



Visit
LOUDOUN



LOUDOUN
DC'S WINE
COUNTRY
VIRGINIA

FY24 Sales Plan

Objectives Strategies Measures

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Addendums:

- A Tradeshow Calendar (Pending Approval)
- B STR Custom Forecast (Pending Approval)

About Visit Loudoun

The Loudoun Convention & Visitors Association (Visit Loudoun) is the destination management organization for Loudoun County and its incorporated towns. As the primary programmatic arm for Loudoun’s travel and tourism promotion, it leads the Loudoun tourism industry to work together to generate visitor spending by developing and implementing comprehensive destination management programs. It is a self-governing private not-for-profit corporation with a Board of Directors elected by dues paying members.

Visit Loudoun was established in 1995 as the Loudoun Tourism Council to support the preservation, utilization, and enhancement of Loudoun's unique historic, cultural, and natural tourism assets to ensure community wellbeing and sustainable economic returns including tax revenues, employment, business profitability, and return on investment. Today, Visit Loudoun has a signed Memo of Understanding with Loudoun County to perform core tourism services and works with the industry to implement a county-wide Tourism Destination Strategy.

A NOTE ON POST COVID-19

The extraordinary circumstances brought on by the pandemic have altered and will continue to affect FY24 sales plans and executions with new challenges: staff shortages and supply chain issues. We are also challenged with dated product, lack of new product and recession concerns. The situation remains fluid and so the strategies and tactics outlined here are likely to shift in response.

Vision Statement

To be a “must visit” destination supported by a community that recognizes the economic and quality of life benefits that come from sharing our home with visitors. Loudoun County will be the preferred east coast destination for lovers of artisanal, epicurean, and culturally rich experiences.

Mission Statement

To stimulate the sustainability and enhancement of Loudoun County’s economy and quality of life by advocating for smart destination development and marketing an exceptional experience to travel consumers worldwide.

Internationally Accredited Destination Marketing Organization (DMO)

Visit Loudoun (DMO) is accredited by Destination Marketing Accreditation Program (DMAP) of the Destination Marketing Association International, 2505 M Street, NW, Suite 500, Washington, DC 20036, Phone: 202-296-7888.

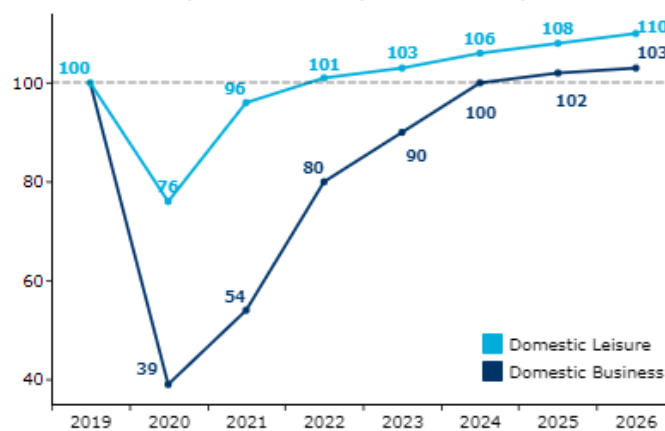
Lodging and Travel Trends

United States

US Travel and Tourism Economics have forecasted continued pandemic recovery and growth across all markets through the rest of 2023 and into 2024. At the national level, domestic leisure travel has already recovered to 2019 levels and is expected to continue to grow in 2023 and 2024. Despite an uncertain economy with high inflation and high gas prices, the pent-up demand for travel is leading Tourism Economics to forecast domestic leisure travel to reach 103% of 2019 levels for the rest of 2023.

Leisure vs. Business Travel Volume

Forecasted recovery, relative to 2019 (index, 2019=100)

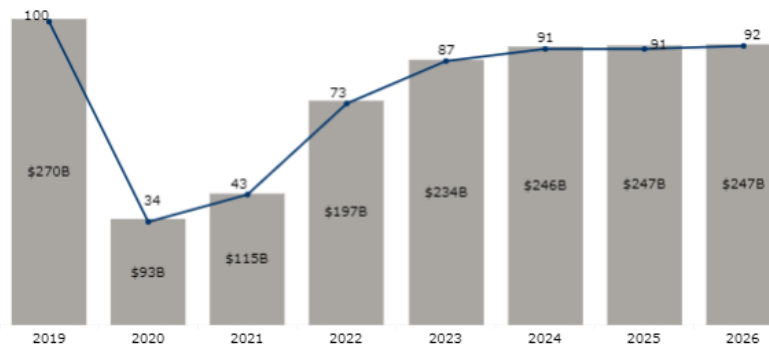


Source: Tourism Economics

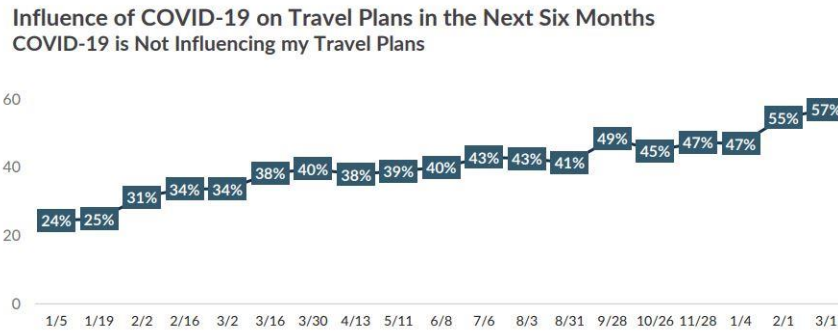
The outlook for domestic business travel is a somewhat different story. In 2023, domestic business travel is expected to be at 90% of 2019 levels and to be 100% recovered by 2024. However, it is forecasted that domestic business travel spending will not be equal to 2019 spending until past 2026.

Real Domestic Business Travel Spending

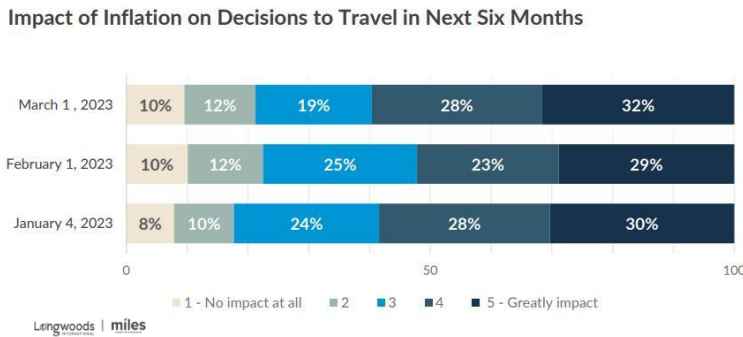
Forecasted recovery, relative to 2019 (index, 2019=100)



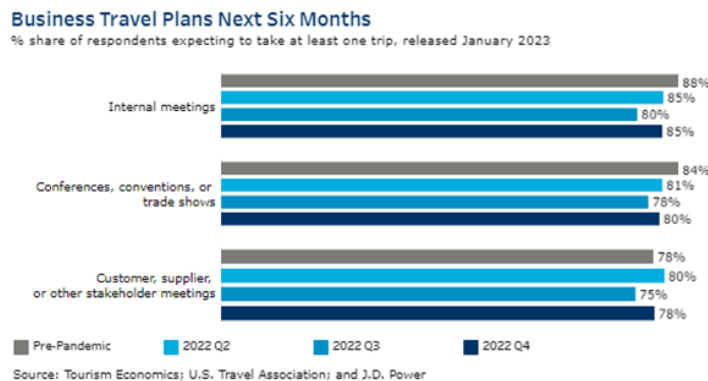
While Covid-19 still challenges the travel industry with staff shortages, supply chain issues, and recession concerns. Travelers are eager to start traveling again. Only 17% of travelers say coronavirus will greatly impact their travel decisions in the next six months, the lowest level since March of 2020. The chart below was fielded March 2023. The chart shows the 33% increase of travelers not letting Covid-19 concerns affect their travel plans.



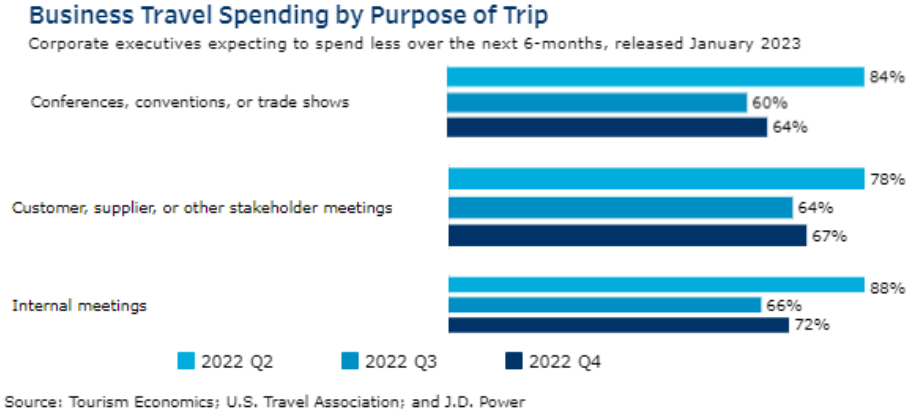
However, the finances of travelers and inflation of prices are making an impact on the decisions of travelers, with only 10% saying that inflation has no impact at all on their travel decisions as of March 2023.



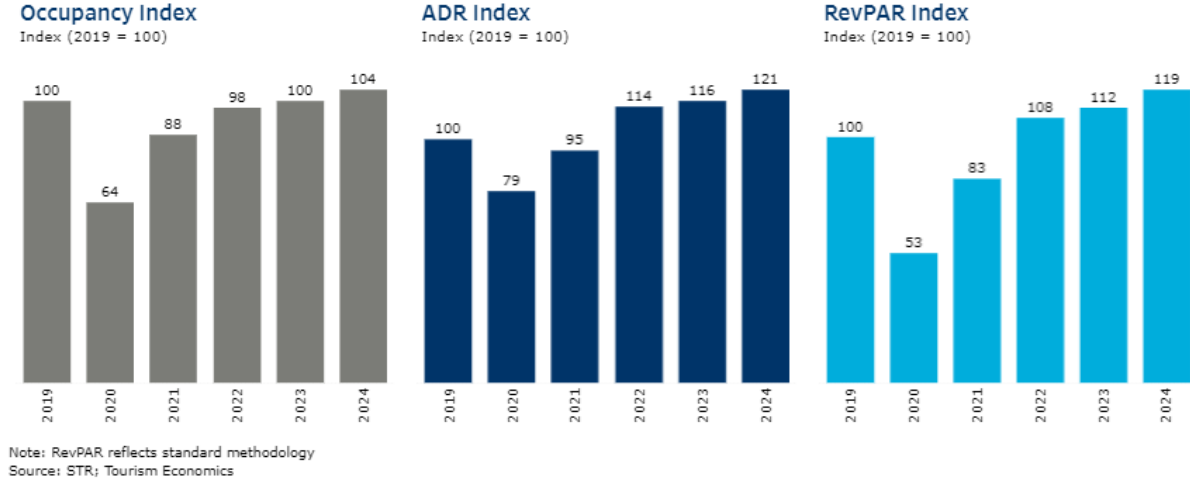
Companies, however, are making travel plans despite the concerns of inflation. Business travel plans are expected to continue, and businesses are expecting to take at least one trip within the next year. These travelers' expectations are forecasting to either meet 2019 predictions or come within a few percentages.



Although companies are expecting to have business travel plans within the next 6 months, business travel spending is forecasted to decrease an average of 16% between the three categories below.



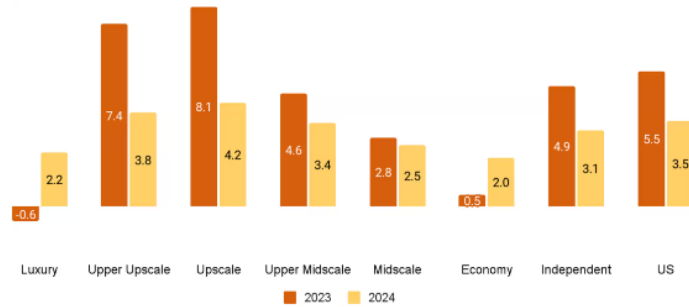
Tourism Economics and STR anticipate a weaker economic momentum will temper with travel recovery, but the rebuilding of business travel and ongoing prioritization of leisure travel is expected to support the continued lodging demand growth next year. US hotel demand is forecast to recover slightly above 2019 levels in 2023. ADR is expected to recover 15.3% above 2019 levels in 2023.



According to a PricewaterhouseCoopers forecast, while leisure travel is strong now, it is slowing. At the same time, business travel and group business are contributing to growth. For the remainder of 2023 and into 2024, demand growth from individual business travel and groups is expected to offset a softening in leisure demand. With flattening occupancy levels in 2024, growth is expected to come almost entirely from ADR, with an expected year-over-year increase in RevPAR of 3.5 percent – approximately 118 percent of pre-pandemic levels. PwC Hospitality’s outlook for 2023 has RevPAR growth moderates - up 5.5%, growth in ADR slows, as the government continues to gain control over

inflation – up 4.1%, and demand growth slows significantly as the economy slows, resulting in an occupancy of 63.4%.

RevPAR percent change, US and chain scales



Source: PwC, based on data from STR

Virginia & the DC Metro Region

Travel is a significant economic driver for Virginia. It plays an essential role in generating new job opportunities, cultivating communities, creating new businesses, and contributing to public funding. Domestic and international travelers spent an estimated \$30.4 billion while visiting Virginia in 2022. With travel spending being 4.5% above 2019 levels and 20.4% above 2021 levels.

STATE DATA				
YEAR	TRAVEL SPENDING	STATE AND LOCAL TAX RECEIPTS	JOBS	TRAVEL INDUSTRY EMPLOYMENT RANKING
2019	\$29.1 Billion	\$2.1 Billion	240,800	5
2020	\$17.5 Billion	\$1.4 Billion	170,800	8
2021	\$25.2 Billion	\$1.8 Billion	187,300	8
2022*	\$30.4 Billion			

SOURCE: U.S. Travel Association and Tourism Economics
*Preliminary

Throughout the pandemic, the DC Market was one of the hardest hit markets in the US, and Northern Virginia has had lower hotel performance than most other regions of Virginia due to its more urban environment and reliance on business travel. However, so far in 2023, Northern Virginia has outperformed other Virginia regions. Northern Virginia has the highest YTD RevPAR and ADR (March) of any other region. This suggests there will continue to be strong performance in the region throughout the rest of the year. The state level 2023 hotel forecast from Virginia Tourism Company and STR is shown below. This was as of March 2023.

Virginia Hotel Forecast		2023
Occupancy		+8.4%
ADR		+12.3%
RevPAR		+41.4%

Source: VTC & STR.

Loudoun County Hotel Performance

Loudoun County currently has 37 hotels with 6,012 rooms. In addition to these hotels, there are 44 Bed and Breakfast Inns located throughout the county. A Home2 Suites in Leesburg opened in May of 2023. The table below shows Loudoun County's hotel performance for the last few years and the 2023 performance.

Annual Performance*	Year	Occupancy		ADR		RevPAR	
		%	% Change	\$	% Change	\$	% Change
	2019	67.0	-2.5	126.82	2.3	84.99	-0.3
	2020	40.5	-39.5	105.13	-17.1	42.62	-49.9
	2021	55.7	37.4	118.80	13.0	66.18	55.3
	2022	67.8	21.9	133.59	12.4	90.63	37.0
	2023	67.1	7.7	141.78	13.8	95.17	22.5

Source: STR, Inc. The 2023 performance is as of May 2023 * All these figures are for calendar years.

Leesburg Hotel Performance

Leesburg currently has 7 hotels with 686 rooms. In addition to these hotels, there are 4 Bed and Breakfast Inns located in Leesburg. A Home2 Suites in Leesburg opened in May of 2023. The table below shows Leesburg's hotel performance for the last few years and the 2023 performance.

Annual Performance*	Year	Occupancy		ADR		RevPAR	
		%	% Change	\$	% Change	\$	% Change
	2019	69.4	5.9	110.16	0.5	76.47	6.4
	2020	39.7	-42.8	95.94	-12.9	38.11	-50.2
	2021	54.3	36.8	112.56	17.3	61.14	60.4
	2022	64.2	18.2	119.58	6.2	76.78	25.6
	2023	63.0	2.8	116.07	7.0	73.16	10.0

Source: STR, Inc. The 2023 performance is as of May 2023 * All these figures are for calendar years.

Loudoun County Sales Performance (FY21-FY23)

The following chart displays the definite room night totals and leads sent, by segment and quarter during FY21, 22 & 23.

Quarter 1	Definite Room nights			Leads Sent		
Market Segment	FY 21	FY22	FY23	FY21	FY22	FY23
Corporate/Association	13,258 (8,000)	1,426	1,917	59	29	95
Government/Military		1,495	7,679	1	3	13
SMERFEE		285	29	6	21	12
Tour & Travel	205	982	1,059	2	26	43
Sports	3,634	3,886	2,084	12	9	8
Weddings	1,738	1,223	2,014	58	32	51
TOTAL	18,835	9,297	14,782	138	120	222

Quarter 2	Definite Room nights			Leads Sent		
Market Segment	FY21	FY22	FY23	FY21	FY22	FY23
Corporate/Association	1,223	6,260	3,241	14	32	37
Government/Military		3,278	7,206	2	7	10
SMERFEE		145		8	4	12
Tour & Travel	181	783	987	11	20	22
Sports	9800 (2745)	7,427	15,695	5	16	9
Weddings	2,396	3,039	3,025	57	92	56
TOTAL	13,600	20,752	30,154	97	173	146

Quarter 3	Definite Room nights			Leads Sent		
Market Segment	FY21	FY22	FY23	FY21	FY22	FY23
Corporate/Association	3,681	4,653	7,921	23	51	56
Government/Military	10,320			2	1	2
SMERFEE		317	20	6	19	15
Tour & Travel	207	891	1,598	7	24	39
Sports	4,355	2,870	3,558	9	38	30
Weddings	2,093	2,336	2,437	68	106	78
TOTAL	20,606	11,067	15,534	115	239	220

Quarter 4	Definite Room nights			Leads Sent		
Market Segment	FY21	FY22	FY23	FY21	FY22	FY23
Corporate/Association	2,093	834	7,002	16	50	42
Government/Military		8,008			8	11
SMERFEE	146	689	1,406	7	17	9
Tour & Travel	514	8,627	10,156	5	185	245
Sports	9,607	5,973	6,295	31	16	6
Weddings	1,818	2,058	1,155	52	42	48
TOTAL	14,178	26,189	26,014	111	318	361

YEAR END TOTAL	56,474	67,305	86,484	461	850	949
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Leesburg Hotel Sales Performance (FY21-FY23)

The following chart displays the definite room night totals and leads sent, by hotel and market during FY21, 22 & 23.

Please note Home2 Suites Leesburg opened in 2023

<u>Yearly Totals</u>	<u>Definite Room nights</u>			<u>Leads Sent</u>		
<u>Hotel</u>	<u>FY 21</u>	<u>FY22</u>	<u>FY23</u>	<u>FY21</u>	<u>FY22</u>	<u>FY23</u>
Best Western Leesburg Hotel & Conference Center						
Meeting Sales	100	66	662	10	24	16
Sports Sales	444	300	510	11	13	9
Tour/Travel				2	7	4
Weddings	250	642	260	215	250	51
TOTAL	794	1,008	1,432	238	294	80
Clarion Hotel & Conference Center Leesburg						
Meeting Sales				9	18	7
Sports Sales	775	80	500	8	8	7
Tour/Travel				2	2	1
Weddings	640	932	757	221	253	194
TOTAL	1,415	1,012	1,257	240	281	209
Comfort Suites Leesburg						
Meeting Sales	39	65	45	12	19	12
Sports Sales			200	7	10	8
Tour/Travel				3	10	5
Weddings	780	413	220	211	249	199
TOTAL	819	478	465	233	288	224
Hampton Inn & Suites Leesburg						
Meeting Sales	662		26	8	15	12
Sports Sales	120	235	345	9	12	11
Tour/Travel		25	150	2	8	6
Weddings	795	1,294	1,889	140	134	153
TOTAL	1,577	1,554	2,410	159	169	180
Home2 Suites Leesburg						
Meeting Sales			45			3
Sports Sales			34			5
Tour/Travel						1
Weddings			391			129
TOTAL			407			138
Homewood Suites by Hilton - Leesburg						
Meeting Sales	113		2647	10	20	23
Sports Sales	21		370	9	10	9
Tour/Travel				4	7	3
Weddings	601	1,411	3,573	131	250	204
TOTAL	735	1,411	6,590	154	287	234
Red Roof Inn Leesburg						
Meeting Sales	8	160	58	11	8	4
Sports Sales	75			5	8	7
Tour/Travel				1	1	1
Weddings	185			217	250	196
TOTAL	268	160	58	236	267	215
GRAND TOTAL	5,608	5,623	12,619	1,259	1,586	1,223

FY24 Sales Initiatives

Market Segmentation – Sales Department

Sales Department is broken down by market segments:

- Corporate, Association
 - Construction
 - AAA
 - Business Travel
- Government/ Military
- SMERFEE
 - Military/ Family Reunions
 - Religious
 - Equestrian
 - AAA
- Sports
- Tour & Travel
 - Domestic
 - International
- Weddings

Room Night Goals – Historical Data

Fiscal Year	Room Night Goal	YOY* Change (# of room nights)	YOY* Percentage Change (Approx.)
FY19	94,934	9,934	11%
FY20	105,750	10,816	11%
FY21	49,180	-56,570	-53.5%
FY22	69,126	19,946	29%
FY23	72,000	2,874	1%
FY24	77,000	5,000	6.5%

*YOY = Year over Year

Room Night Goal – FY24

The department’s room night **goal for FY24 is 77,000 based** on US Travel current market trends. Latest STR forecast is....

Market Segment	Room night Goal:
Corporate/ Association/ Government/ Military/ SMERFEE	29,000
Sports	25,000
Tour & Travel	13,000
Weddings	10,000
TOTAL:	77,000

FY24 Sales Meetings and Tradeshow by Market

The plan's timing and tactics are subject to change based on POST COVID-19 and economic climate, as noted on Page 2 of this document.

Corporate/ Association Market Segment

Corporate market consists of travel planners sourcing in-person and hybrid meetings for their corporations including trainings, special events, seminars, board retreats. GBTA and GWBTA are also instrumental in capturing business travelers to include AAA corporate business groups.

Association market consists of meeting planners and executive directors who are sourcing their in-person or hybrid annual conventions and regional meetings as well as staff retreats and special events. This segment includes both State and National Associations.

3rd Party Planners such as Helms Briscoe, and Conference Direct who book meetings and events for corporations, associations and SMERFEE segments (mainly). They are included in the corporate/association market segments.

Government/Military

Includes local, state, and federal government planners as well as military events (NOT including reunions see below).

SMERFEE (including Equestrian)

“S” is for Social such as Sororities, “M” is for military reunions, “E” is for Educational Groups which originated from an educational institution, “R” is for Religious Groups who originate from a church, synagogue, mosque, or retreat center. “F” is for fraternal organizations such as college fraternities, “E” is for entertainment groups and our last “E” represents our Equestrian Market which is a segment unique to Loudoun.

Construction

Due to Covid19 we continue our increased focus in this market. Loudoun County is a leader in the Northern Virginia area for new project data centers, infrastructure improvements, retail, and residential development.

Tradeshows:

- Connect DC Corporate Track
- Connect Midwest Association Track
- CVB Reps Holiday & Summer Client Events
- eVA Procurement

- GBTA – Global Business Travel Association
- Helms Briscoe Annual Business Conference
- Loudoun County Equine Alliance Expo- Local Loudoun Equestrian Show
- National Education Conference/Society of Government Meeting Planners - NEC/SGMP Annual Conference
- Northstar Boutique Meetings
- Potomac Meeting Planners International - PMPI ReConEx
- Professional Convention Management Association – PCMA Annual Conference
- Reston Herndon Meeting Planners - RHMP Summer Camp
- Smart Meetings Smart Women
- Virginia Society of Association Executives - VSAE Annual Conference
- Virginia Society of Association Executives - VSAE Fall Expo

Current Market Initiatives:

- Annual Conference NEC/SGMP
- Concierge Services Program (CSP)
- CVB Reps Committee Member
- CVENT Two Diamond
 - o Expanded corporate outreach
- Global Business Travel Association (GBTA), Business Travel, Greater Washington Business Travel Association, Women and Men in Network in Travel (WINIT) Committee Member
- Helms Briscoe Partnership
- Hybrid meetings resource
- Knowland Prospecting resource
- LGBTQ MPA partnership
- Loudoun County Construction Projects Program
- Loudoun County Department of Economic Development (DED), Collaboration of VIP visitors & Inc 5000 reception
- Meeting Planner E-Newsletter (quarterly)
- National Coalition of Black Meeting Planners
- PCMA Advocacy Committee Member
- Potomac Meeting Planners International (PMPI) educational/networking event, quarterly
- Sales Missions
- SCIF meetings resource
- Society for Government Meeting Professionals (SGMP) educational/networking event, quarterly and Expo
- Threshold 360 utilization for construction outreach
 - o VIP services
- Visit Loudoun Mobile Deals Website, QR Code
- VSAE Monthly Educational Seminars/ Networking; Board member; and partnership

New Market Initiatives:

- Annual one on one meetings with top HB producers with Lansdowne
- Connect Diversity
- Continue to expand and improve Concierge Services Program to our meetings' audience via newsletter & website
- Equestrian sales outreach on-going
- eVa Procurement
- FAM with FLEX (Fairfax Loudoun Event Executives)
- Increase tradeshow sponsorship
- Military reunion sponsorship with BF Saul
- Northstar Boutique Meetings
- Research fraternal and new religious tradeshow
- Robust teambuilding: sustainability and wellness
- Sales mission and client events with VADMO

Sports Market Segment

Sports Market consists of event rights-holders to include tournament directors and organization leaders for various individual and team sports.

Third Party Housing Bureaus (i.e., HBC Events Services, Halpern Travel and Travel Team Source) who are contracted by rights-holders and organization leaders to handle all aspects of lodging requirements.

Tradeshows:

- Connect Sports
- Sports ETA
- TEAMS

Organizational Annual Meetings (with PRCS):

- Senior Softball-USA
- USA Softball
- USSSA

Current Market Initiatives:

- Collaboration with professional teams (Loudoun United FC, Old Glory DC, Washington Spirit)
- Combine bid efforts with regional partners
- Continue involvement in Sports Virginia
- Data and market support for public/private indoor sports facility
- ION event development (US Figure Skating, USA Hockey)
- Recruitment of events through sports tournament reimbursement program
- Revenue stream through 3rd party rebates (\$2.00/ room)

- SportsNOVA collaboration
- Utilization of database through SCOUT and Playeasy

New Market Initiatives:

- Data and market support and event development for USTA Mid-Atlantic campus (future tournaments – ITA, Collegiate Athletic Conference, Pickleball)
- Increase trade publication advertising (print and digital)
- Increase tradeshow sponsorship
- Promotion of Hal & Bernie Hanson Regional Park
- SportsNOVA site inspections (single and large multi-sport)

Tour & Travel Domestic Market Segment/International Market Segment

The Domestic Market Segment includes Tour Operators & Receptives

The International Market Segments includes FIT/Wholesalers

Current Tradeshows:

- American Bus Association Annual Marketplace
- Global Travel Exchange
- NVTP (Northern Virginia Tourism Partnership) Sales Mission
- PA Bus Association
- Select Travel
- Southeast Tourism Society Domestic Showcase (Formally Travel South Domestic)
- Student Youth Travel Association (SYTA) – Annual Conference
- Travel South International Showcase
- VADMO (Virginia DMO's) Sales Mission

Current Market Initiatives:

- AAA (American Automobile Association) Group/Leisure
- Building new and reinforcing current receptive relationships
- Destination DC (DDC) marketing events
- FAMS/Site Visits
- Group programming outreach
- Market e-newsletters
- NVTP Sales Initiatives
- Research ways to measure and track day tours
- Tour operator sales missions – Drive Market (See Source data)
- Weekly communications with World Strides

New Market Initiatives:

- ABA Women in Buses (committee application pending)
- Consumer show/OTA (TBD)
- Create diverse itineraries
- FAMS (TBD)
- NVTP/GTE Sponsorship
- Research and outreach bank travel groups
- Select Travel

Weddings/Social Market Segment

Visit Loudoun assists event planners and wedding couples locate accommodations, venues and vendors for their special event.

Current Tradeshows:

- Love Loudoun Wedding Showcase
- The Washington Wedding Experience (DC)

Current Market Initiatives:

- Area church outreach
- Hunt Country Celebrations
- Lead referral incentive
- Rack card/magazine wedding venue blitz (ask for leads, shows)
- Research and evaluate regional tradeshows
- Visit Loudoun Wedding Professionals networking mixers
- Wedding Advisory Committee
- Wedding MBA
- Women's Wedding Network

New Market Initiatives:

- Increase Bridal Shower/Bachelor/Bachelorette party interest/leads
- Increase Rehearsal dinner leads
- Local venue wedding shows
- Monthly hotel outreach for wedding group services
- New rack card for expanded social market
- Research and outreach into cultural wedding, religious, and social events
- Vendor education
- Wedding planner FAM

Client Services

Current Client Services

- Loudoun Deals
- Monthly hotel outreach for meeting concierge/sports group services
- Corporate Concierge Services Program expansion
- Welcome Cards/ Postcards (include Welcome message and Deals)
 - o Sports
 - o Meetings & Groups
 - o Tour and Travel (to only include welcome message and 'Fun Facts')
 - o Construction
- Continue to update services menu to include team building: "voluntourism"
- Oversee sales promotional Inventory, inputting orders
- Hybrid and SCIF meeting coordination
- Threshold 360 mapping (does not meet expectations)
- Offering Get Out Loudoun to groups
- Lodging Outlook Forum
- DOS (Director of Sales) Quarterly Meetings

New Client Services

- Welcome Cards/ Postcards (include Welcome message and Deals)
 - o Weddings (create)
 - o Construction (update)
- Review Loudoun mobile Deals QR Code website usage/Plan B (coupon book)
- Continue to update services menu to include team building: "voluntourism," *sustainability, and wellness*
- Research Threshold 360 mapping alternative (marketing)
- Hotel Partner Outreach twice a year (May & October) planning by Dana Henry and Hannah Oliver in order to promote referrals

New Business Development Initiatives

New Initiatives

- Analyze year end See Source data to present at annual hotel/VL meeting
- Continue to update PowerPoint presentation for bid proposals
- Continue to increase inventory of group dining menus
- Update meetings concierge deck
- Create a video for bid proposals (marketing)

- Continue to expand to teambuilding deck
- Update SCIF meeting deck (tentative; marketing)
- Create new wedding pop up banner (marketing)
- Update drone videos of sports facilities
- Branded fitted table covers – 1 with VL logo (w/o wine country), 1 with VL & 2 stamp logos
- Unique meeting space and team building video (marketing)
- Pursuing Optional RFP's in Cvent
- Knowland Prospecting Program
- Bank Travel Group Prospecting
- Research Fraternal organizations
- More exposure (advertising) with National Coalition of Black Meeting Planners for the sports and meeting markets
- HSMAI membership and education
- Loudoun Chamber of Commerce breakfasts
- Loudoun Chamber of Commerce Young Professionals
- Leadership Loudoun
- CTA Sales Script
- Local wedding venue shows
- Construction site calls with deal cards

Visitor Center

Current Initiatives

- Simpleview utilization for Ale Trail redemption, phone call tracking and collateral requests
- Improve organization/set-up of Visitors Center storage and rack card inventory
- Provide positive guest experience with limited hours
- Utilize sandwich board and outdoor box revamp to increase walk-in numbers
- Diversifying first Friday offerings to include all craft beverages and artisans

New Initiatives

- Roll out additional Friday evening events
- Loudoun Deals card for Visitors Center
- Visitor services summit (Destinations International)
- Research Homebase for Visitor Center streamlining
- Address selling items in the Visitor Center (beer glass, wine tumbler, water tumbler, something history) research other destinations visitor centers to see what they sell
- Grant Program for historical sites rack cards production

