Research Objectives

Why do they come?

Who are they?

What do they do here?

How do we get more?

Visitors

Wine Visitors
Visitor Demographics

Day trip 44%
Paid lodging 38%
Visit friends/family (VFR) 18%
Visitors who stay in Paid Lodging

On average:

- 3.1 people in travel party
- Stay 2.4 nights in Loudoun County
- 2.5 visits to Loudoun County in past few years
- Half choose Loudoun County a month before visiting

Why do they visit?

- Leisure
- Business
- Wedding/event
- Sports

How do they get here?

Visit LOUDOUN

2018 Traveler Profile
Visitors who stay in Paid Lodging

What do they do in Loudoun County?

Average 4.5 activities/trip

How much do they spend in Loudoun County?

<table>
<thead>
<tr>
<th>Activity</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lodging</td>
<td>$327</td>
</tr>
<tr>
<td>Meals/food/groceries</td>
<td>$176</td>
</tr>
<tr>
<td>Shopping</td>
<td>$148</td>
</tr>
<tr>
<td>Wineries, vineyards + tours/products</td>
<td>$87</td>
</tr>
<tr>
<td>Transportation within Loudoun County</td>
<td>$55</td>
</tr>
<tr>
<td>Arts &amp; culture</td>
<td>$34</td>
</tr>
<tr>
<td>Breweries + related tours/products</td>
<td>$30</td>
</tr>
<tr>
<td>Other</td>
<td>$29</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>$885</strong></td>
</tr>
</tbody>
</table>

When do they visit?

Jan     Feb     Mar     Apr     May     Jun     Jul     Aug     Sep     Oct     Nov     Dec
Visitors who stay with Friends/Family

On average:

- 2.8 people in travel party
- Stay 2.7 nights in Loudoun County
- 4.7 visits to Loudoun County in past few years
- Half choose Loudoun County within 2 weeks of visiting

Why do they visit?
- Leisure
- Business
- Wedding/event
- Sports

How do they get here?
- Car
- Airplane
- Train
Visitors who stay with Friends/Family

What do they do in Loudoun County?

- Average 3.5 activities/trip

How much do they spend in Loudoun County?

<table>
<thead>
<tr>
<th>Activity</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Meals/food/groceries</td>
<td>$102</td>
</tr>
<tr>
<td>Shopping</td>
<td>$83</td>
</tr>
<tr>
<td>Transportation within Loudoun County</td>
<td>$36</td>
</tr>
<tr>
<td>Wineries, vineyards + tours/products</td>
<td>$32</td>
</tr>
<tr>
<td>Arts &amp; culture</td>
<td>$10</td>
</tr>
<tr>
<td>Breweries + related tours/products</td>
<td>$8</td>
</tr>
<tr>
<td>Other</td>
<td>$15</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>$288</strong></td>
</tr>
</tbody>
</table>

When do they visit?

Jan Feb Mar Apr May Jun Jul Aug Sep Oct Nov Dec
Day Trip Visitors

On average:

- 2.7 people in travel party
- 6.8 visits to Loudoun County in past few years
- Over half choose Loudoun County within a week of visiting

Why do they visit?

- Leisure
- Business
- Wedding/event
- Sports

How do they get here?
Day Trip Visitors

What do they do in Loudoun County?

Average 2.3 activities/trip

How much do they spend in Loudoun County?

<table>
<thead>
<tr>
<th>Activity</th>
<th>Cost</th>
</tr>
</thead>
<tbody>
<tr>
<td>Shopping</td>
<td>$60</td>
</tr>
<tr>
<td>Meals/food/groceries</td>
<td>$45</td>
</tr>
<tr>
<td>Transportation within Loudoun County</td>
<td>$21</td>
</tr>
<tr>
<td>Wineries, vineyards + tours/products</td>
<td>$20</td>
</tr>
<tr>
<td>Breweries + related tours/products</td>
<td>$4</td>
</tr>
<tr>
<td>Arts &amp; culture</td>
<td>$4</td>
</tr>
<tr>
<td>Other</td>
<td>$8</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>$163</strong></td>
</tr>
</tbody>
</table>

When do they visit?

![Graph showing the visitation patterns from Jan to Dec]
Who or what influences which wineries/vineyards you choose?

- Wine tastings: 88% Loudoun County visitors, 83% Potential visitors
- Recommendations from friends/family: 77% Loudoun County visitors, 84% Potential visitors
- Recommendations from other vineyards/wineries: 66% Loudoun County visitors, 66% Potential visitors
- Awards or ratings: 64% Loudoun County visitors, 61% Potential visitors
- Wine trail tours: 62% Loudoun County visitors, 62% Potential visitors
- Website/wine blog: 56% Loudoun County visitors, 48% Potential visitors
- Waiters/restaurants: 53% Loudoun County visitors, 49% Potential visitors
- Wine publications: 47% Loudoun County visitors, 42% Potential visitors
- Advertisements: 44% Loudoun County visitors, 47% Potential visitors
Wine Visitors

How much do wine visitors spend in Loudoun County?

<table>
<thead>
<tr>
<th>Category</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lodging</td>
<td>$188</td>
</tr>
<tr>
<td>Meals/food/groceries</td>
<td>$130</td>
</tr>
<tr>
<td>Wineries, vineyards + tours/products</td>
<td>$88</td>
</tr>
<tr>
<td>Breweries + related tours/products</td>
<td>$25</td>
</tr>
<tr>
<td>Arts &amp; culture</td>
<td>$20</td>
</tr>
<tr>
<td>Shopping</td>
<td>$121</td>
</tr>
<tr>
<td>Transportation within Loudoun County</td>
<td>$47</td>
</tr>
<tr>
<td>Other</td>
<td>$26</td>
</tr>
<tr>
<td>Total</td>
<td>$646</td>
</tr>
</tbody>
</table>

Nearly half stay in paid lodging

Wine visitors are more likely to stay in high-end hotels and B&B’s

Trip spending by age group

- 18-34: $638
- 35-54: $799
- 55+: $433

Visit Loudoun
What do you consider the best U.S. wine regions?
Potential visitors are not familiar with Loudoun County

Lack of information could be a chief reason for non visitation.
Where to advertise to reach Potential Visitors

- Philadelphia
- Pittsburgh
- Washington, DC
- Baltimore
- Harrisburg
- Scranton
- Richmond
- Salisbury
- Harrisonburg
- Johnstown
Insights & Recommendations
Activities to Promote...

- Locally owned restaurants
- Chain restaurants
- Parks
- Outdoor recreation
- Farmers’ markets
- Wineries/vineyards
- Festivals/events
- Shopping
- Historical attractions
- Country/scenic drives
- Sightseeing
- Rest and relaxation
- Local art
- Nightlife/entertainment
- Cideries/distilleries
- Wine pass
- Golf
- W&OD Trail
- Farms/Ag
- Breweries or beer trail
- Arts and culture
- Sporting events
- Equestrian activities
- Weddings

Visit LOUDOUN 2018 Traveler Profile
Activities to Promote in Paid Media

- Wineries/vineyards
- Festivals/events
- Shopping
- Historical attractions
- Country/scenic drives
- Sightseeing
- Rest and relaxation
Activities to Promote through Partner Niche Marketing

- Breweries or beer trail
- Arts and culture
- Sporting events
- Equestrian activities
- Weddings
Activities to Promote through In-Destination Marketing

Locally owned restaurants
Chain restaurants
Parks
Outdoor recreation
Farmers’ markets
Activities to Promote through In-Destination Niche Promotion

Low Motivation

Local art
Nightlife/entertainment
Cideries/distilleries
Wine pass
Golf
W&OD Trail
Farms/Ag
Museums

Small Audience

2018 Traveler Profile
Insights & Recommendations

Identify ways to increase overnight visitation

Wine is a key element of the county’s leisure experience and should be a main focus of marketing.

Incentivize people to recommend Loudoun County – reward locals who bring in visitors to the wineries

#loveloudoun

Events are a niche that works and brings in visitors

Philadelphia and Pittsburgh are promising markets for expanded advertising