
Shenandoah Valley Regional Section

Introduction

As a supplement to the Virginia State Tourism Plan, this section is dedicated to the Shenandoah Valley region. ***It is strongly suggested that the Virginia State Tourism Plan be read in conjunction with this regional section.***

The key elements of this regional section include the following:

- A situational analysis of tourism in the region, which highlights the key tourism products, regional strengths and challenges, competitive considerations, and other relevant information, is presented to set the framework for the regional strategy.
- Key product themes of focus are identified and applicable objectives and strategies are presented for the five plan outcomes of Products, Pillars (infrastructure), Partnerships, Promotions, and Policies for the Shenandoah Valley tourism strategy.
- Action steps specific to the region, which are above and beyond the actions of the state level plan are outlined.
- Stakeholders proposed to be involved in implementing the plan are also identified.
- Key takeaways for the Shenandoah Valley's tourism development in the next five years are outlined.

Process for Findings

Numerous factors formed the basis of the Shenandoah Valley's tourism strategy, including the tourism industry's own vision for the region, an inventory and analysis of the tourism assets currently offered, input and analysis of visitor information, and an analysis of the competitive environment. These four key areas are further described below:

Industry Vision: The industry vision served as the foundation for the region's strategy, based on input from approximately 1,300 responses statewide, including stakeholders from the Shenandoah Valley region through workshops, surveys, and discussions. The desire among Shenandoah Valley stakeholders is to utilize the region's natural assets and further develop outdoor recreation experiences, and build on its rich history and heritage, authentic small town atmosphere, arts & music culture, and other attractive attributes in the region.

Tourism Assets: The Shenandoah Valley's tourism assets were analyzed by the study team. This included the current mix of tourism products such as attractions, visitor activities, hotel inventory, natural assets and topography, industry base, and socio-cultural character. The strengths and challenges of the region's current characteristics such as infrastructure, road/air accessibility, partnerships, policies, and promotions were

also discussed with numerous key stakeholders and assessed. In addition to the study team's personal experience of the Shenandoah Valley, other input contributed to an understanding of the existing tourism assets, including input from tourism stakeholders, VTC databases, local tourism marketing information/promotional information from organizations such as the Shenandoah Valley Travel Association, DMOs, and chambers of commerce, existing tourism plan of the Shenandoah Valley Travel Association and Alleghany, Bath, Botetourt, Craig, and Roanoke Valley, tourism industry associations, tourism industry resources, PwC resources, and others.

Consumer Perspective: Research was analyzed on a global, national, state, and regional level. This research included visitor trends, activities, perceptions/preferences, performance indications, and emerging elements. Macro trends impacting tourism such as population and demographic trends, GDP/GSP, unemployment rates, consumer prices, personal consumption spending, gas prices, and other factors impacting tourism in a broad sense were also analyzed.

Sources of research related to Virginia and Shenandoah Valley compiled by the VTC were analyzed, which included profiles of past visitors (by traveler type, geography, season, and activity), traveler attitude studies, and other data. Profiles of past visitors (statewide) showed activities engaged in which are offered in the Shenandoah Valley, seasonality, party size, spending, demographics, income levels, travel distance and patterns, duration of trip, travel party origin, and other relevant information. Attitude studies of past and prospective travelers provided additional insight for the Shenandoah Valley in terms of appeal, perceptions of tourism products, activities, and destination attributes as well as other relevant hub and spoke travel behavior and activities engaged in by past and prospective visitors to Virginia. Visitor data was also analyzed against existing tourism assets.

Visitor insights show that the Shenandoah Valley region had a high favorability rating among past and prospective travelers. It was highly rated for its outdoor recreation opportunities, being relaxing, being good for families, and its overall atmosphere. The region was also recognized by most for being great for scenic drives, possessing interesting small towns, great for hiking/exploring nature, good for viewing wildlife/birds, and being a great place for camping among others. In addition, while recognized for outdoor recreation, other outdoor elements such as paddle sports, biking, and fishing were not as prominent in visitors' minds. The region is best described by visitors as scenic with top of mind features including the region's mountains/hills and its beauty, while additional improvements for appeal include lodging and activities/entertainment.

Additional state/regional sources included data on visitor spending patterns based on economic impact data in the region, state parks attendance, welcome center statistics, the Economic Impact of Wine and Grapes on the State of Virginia, the Weldon Cooper Center for Public Service, and other sources. Examples of national and international sources include data from the United Nations World Tourism Organization, U.S. Travel Association, Office of Travel & Tourism Industries (OTTI), MMGY Global, Outdoor Industry Association, U.S. Culture and Heritage Travel Council, National Trust for Historic Preservation, World Food Travel Association, National Parks Service, Smith Travel Research (STR), America's Byways, Woods & Poole, other U.S. government sources, travel industry publications and articles, and other relevant sources.

Competitive Perspective: To understand the offering and competitive positioning of Virginia and the Shenandoah Valley region, research and analysis was conducted which evaluated destinations, product offerings, market segments, and key strengths of competition on a regional basis and analysis of products, tourism spending, product rankings, and best practices and trends in tourism product areas on a statewide/national basis. For the Shenandoah Valley, West Virginia, Tennessee, North Carolina, and Pennsylvania were analyzed. More specifically, areas of those states were analyzed for key product strengths and included mountainous areas of western North Carolina, eastern Tennessee, West Virginia and western Pennsylvania. Competitive insights show that region is somewhat challenged in differentiating its experiences such as nature and outdoor recreation from nearby mountainous areas in North Carolina, Tennessee, Pennsylvania, some of which may be well known, competitively marketed, and offered in a concentrated area. For example, West Virginia and Tennessee outdoor recreation opportunities are concentrated in centralized areas, offering opportunities for families and outdoor enthusiasts to experience many activities in one area such as outdoor recreation vacations, including lodging, restaurants, camping facilities, along with recreation activities. Eastern Tennessee is also well promoted for its outdoor experiences and packages for rafting, zip lines, ropes courses, etc. States such as Pennsylvania may offer similar scenic getaway experiences as Virginia as well as some wineries. Western North Carolina, including Asheville and surrounding towns, not only offer outdoor recreation (rafting, zip line, fishing, camping), but it also shares the Blue Ridge Parkway and Blue Ridge heritage with Virginia. Asheville has also developed into a strong arts and culinary destination, recognized for local farm-to-table restaurants, high profile chefs and restaurants, and craft breweries. While these states also offer mountain town experiences, including heritage, arts, and culture, the Shenandoah Valley region is differentiated by own unique history and towns with an authentic combination of additional opportunities, such as wine, music, arts, agri-tourism and other visitor experiences.

Sources of this competitive information included, but were not limited to, review of tourism marketing websites/promotional information, tourism marketing and strategic plans, tourism organization annual reports, tourism industry publications and articles, rankings, available consumer-oriented research (statewide) which addresses competition, and tourism companies (outfitters, tour guides, etc.).

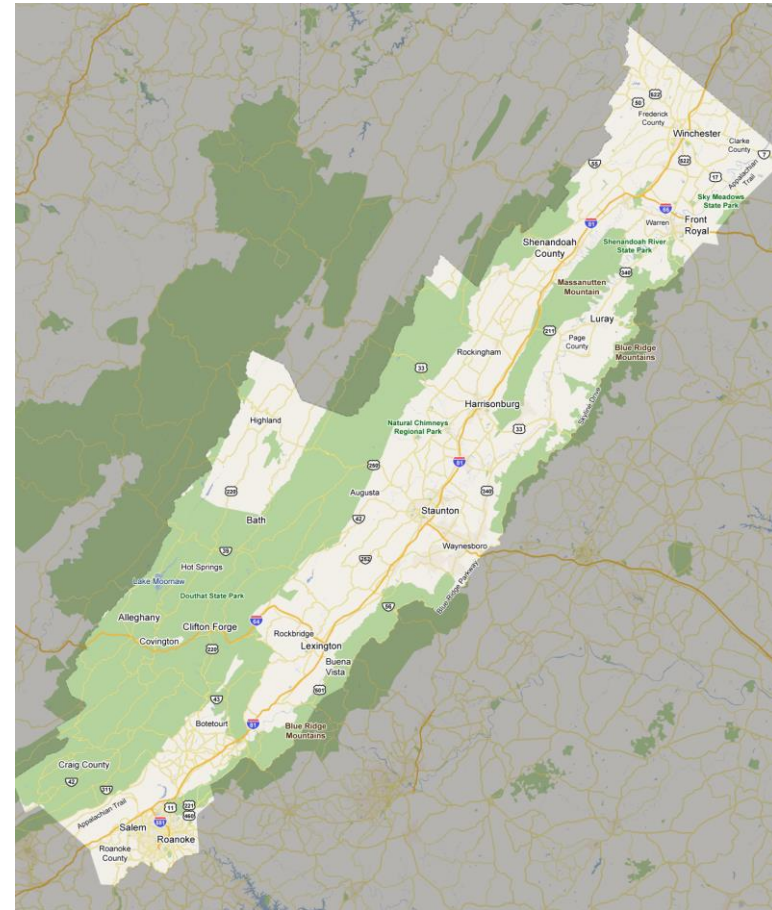
Tourism Situation

Set within the Blue Ridge and the Allegheny of the Appalachian Mountain range, the region is rich in natural beauty and assets, including scenic mountains and valleys, the Shenandoah National Park, Douthat State Park, George Washington & Jefferson National Forests, natural caverns, and others, the Shenandoah Valley region is situated along the western portion of Virginia, bordering West Virginia to the west and the north. The region also has deep historical roots of the Civil War, frontier, and early American history.

The region has grown to over 760,000 residents. The most populous cities include Roanoke (97,000), Harrisonburg (49,000), and Winchester (26,000). It is also strategically located at the cross roads of Interstate 64 connecting Richmond to West Virginia, Interstate 66 connecting Washington D.C. to the Shenandoah Valley, and Interstate 81 connecting Northern Virginia to Tennessee.

From a tourism industry perspective, the region in its entirety is generally one of the more established destinations in the state, and it continues to grow. The Shenandoah Valley region accounted for nearly \$2.1 billion in travel and tourism expenditures in 2011 (approximately ten percent of the state's overall travel and tourism expenditures), which is an increase of 11.9 percent over 2007. In addition to tourism marketing at the destination level, the Shenandoah Valley Travel Association is one of the country's oldest travel organizations. The SVTA markets collaboratively the communities throughout the Shenandoah Valley region, although regional collaboration among stakeholders is recognized as an area for improvement.

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Regional Facts:

- Region Population: 760,000
- Largest Town/city: 97,000
- Border States: WV
- Interstates: I-64, I-66, I-81
- 2011 Tourism Expenditures: \$2.1 billion
- 2007-11 Expenditure Growth: 11.9%

recognized for outdoor recreation, other outdoor elements such as paddle sports, biking, and fishing were not as prominent in visitors' minds. The region is best described by visitors as scenic with top of mind features including the region's mountains/hills and its beauty, while additional improvements for appeal include lodging and activities/entertainment.

Nature and outdoor recreational opportunities are key visitor strengths for the region, offering scenic getaways and adventure for families and outdoor enthusiasts offered by its mountainous landscape, waterways, forests, and other outdoor features. Well-known experiences such as the Blue Ridge Parkway, Skyline Drive, and the Appalachian Trail all run through the region. Other trails include Wilderness Road – Virginia's Heritage Migration Route, US Bicycle Route 76, and the Virginia Birding and Wildlife Trail. In conjunction with these trails, there are also numerous opportunities to hike, bike, horseback ride, observe wildlife, rock climb, hunt, fish, kayak, canoe, and ski among other nature areas such as the George Washington & Jefferson National Forests, Shenandoah National Park (the only National Park fully contained within Virginia), Natural Chimneys Park, Devils Back Bone State Forest, Shenandoah River or one of the two state parks. Furthermore, the region has nine caverns, natural springs, and other natural formations including Luray Caverns, Shenandoah Caverns, Hot Springs, Warm Springs, Natural Bridge, Falling Spring, and others.

Consistent with the nature and outdoor recreation theme, the region possesses the largest share of cottages/cabins (38 percent) and the second largest share of camping/RV parks (19 percent). Page County has the largest concentration of cabins and is called the "Cabin Capital of Virginia". Massanutten, The Homestead Resort, and Bryce Resort also offer resort experiences in a natural setting, including skiing and winter activities. However, the region's economy and mid-scale chains comprise 92 percent of chain properties (excluding independent hotels) based in STR data, indicating limited supply of upscale (and higher-rated) chain properties, which are typically full-service hotels. In addition, outdoor outfitters appear underserved for the region given the number of natural assets and in comparison to other areas of the state.

Highlights of Regional Lures/Strengths:

- Blue Ridge and Allegheny Mountains
- Scenic beauty and Outdoor Recreation opportunities
- Nature-oriented: Appalachian Trail, Blue Ridge Parkway, Skyline Drive, George Wash. & Jeff. National Forest, Shenandoah National Park, Numerous caverns, Natural Bridge
- Civil War History
- National Main Streets: Berryville, Harrisonburg, Luray, Staunton, Waynesboro, Winchester
- Notable Cities & Towns: Roanoke, Lexington, Clifton Forge, Hot Springs, Front Royal, Shenandoah County
- Resorts: Massanutten, Bryce, and Homestead offering skiing and outdoor recreation
- Name recognition of Shenandoah Valley
- Interstate connectivity
- Cabin, Camping and Campground availability

Regional Challenges:

- Differentiation from competition in nearby states - outdoors
- Experiences are dispersed throughout the region
- Limited recognition of assets and towns
- Limited upscale hotel supply
- Limited outfitters

The region is somewhat challenged in differentiating its experiences such as nature and outdoor recreation from nearby mountainous areas in North Carolina, Tennessee, Pennsylvania, some of which may be well known, competitively marketed, and offered in a concentrated area. For example, West Virginia and Tennessee outdoor recreation opportunities are concentrated in centralized areas, offering opportunities for families and outdoor enthusiasts to experience many activities in one area such as outdoor recreation vacations, including lodging, restaurants, camping facilities, along with recreation activities (e.g. ACE Adventure Resort and Adventures on the Gorge Resort in West Virginia, French Broad River Dude Ranch in Tennessee, etc.). Eastern Tennessee is also well promoted for its outdoor experiences and packages for rafting, zip lines, ropes courses, etc. States such as Pennsylvania may offer similar scenic getaway experiences as Virginia as well as some wineries. Western North Carolina, including Asheville and surrounding towns, not only offer outdoor recreation (rafting, zip line, fishing, camping), but it also shares the Blue Ridge Parkway and Blue Ridge heritage with Virginia. Asheville has also developed into a strong arts and culinary destination, recognized for local farm-to-table restaurants, high profile chefs and restaurants, and craft breweries.

While these states also offer mountain town experiences, including heritage, arts, and culture, the Shenandoah Valley region is differentiated by own unique history and towns with an authentic combination of additional opportunities, such as wine, music, arts, agri-tourism and other visitor experiences. The region is also rich in history with nearly 20 battlefields and the Shenandoah Battlefields National Heritage Area. The region is also home to the historic Washington & Lee University where General Robert E. Lee served as president after the war, as well as sites devoted to the pioneers who traveled westward, settled, and farmed such as the Frontier Culture Museum and Cyrus McCormick's Farm.

The Shenandoah Valley region is also home to many of Virginia's great small towns. Berryville, Harrisonburg, Luray, Staunton, Waynesboro, and Winchester, are all designated main streets by the National Main Street Program. Other notable destinations include Roanoke, Lexington, Clifton Forge, Hot Springs, and Front Royal. US Route 11 also serves as a connector among many of the region's towns, including Winchester, Staunton, Lexington, Harrisonburg, New Market, Salem, and Roanoke.

While the region offers a range of visitor opportunities and attractions, they are dispersed throughout the region. However, the Blue Ridge Parkway, Skyline Drive, Appalachian Trail, Interstate 81, wine trails, and other outdoor trails, certainly help to connect attractions and destinations. Other visitor opportunities in the region include 27 wineries as well as over 50 agri-tourism attractions. For sport enthusiasts, the region also offers collegiate athletics at James Madison University and Virginia Military Institute and sports complexes in Salem. Meeting space is also available at the Roanoke Civic Center, Salem Civic Center, Hotel Roanoke, the Homestead, and other various hotels, but supply is generally lower than other areas of the state.

Shenandoah Valley Strategy

Product Focus Areas

Based upon research and analysis efforts described and in consideration of the tourism situation, the following are identified as the primary and secondary areas of product focus for the Shenandoah Valley. The key definitions below describe these areas, which form the basis of the product objectives.

- **Primary theme focus:** Nature & Outdoor Recreation, Town/City Centers, History & Heritage, Arts & Music, Events
- **Secondary theme focus:** Culinary (Agri-tourism, Dining, Wineries), Meetings (Meetings & Conferences), Sports, Industry (Corporate/Business Base), Commercial Attractions (Family, Higher-end)

Those product themes identified as "primary" can generally be characterized as existing or growing product areas that within the next five years should be further developed or enhanced in an effort to serve as (or support) primary draws for the area. Those categorized as "secondary" are areas that in the next five years may realistically need a longer time horizon to develop into a primary draw for the region. Secondary may also indicate areas that may be more niche focused, or those that are generally complementary/auxiliary product experiences to the primary draws in the next five years.

Key Definitions

Nature & Outdoor Recreation - Relaxing and active experiences to enjoy Virginia's scenic natural environment and outdoors, including but not limited to driving tours, hiking, biking, paddling, boating, fishing, hunting, observing wildlife, and others. Beach experiences are also included.

Town/City Centers - Refers to the central area of a destination, generally a downtown or main street area

History & Heritage - Experiences, structures, and sites that show Virginia and U.S. history and heritage

Arts & Music - Visual, performance, and craft arts experiences and music of various genres and musical heritage

Events - May include festivals, fairs, concerts, performances, tournaments/races (running, biking, swimming, kayaking, rowing, boating/sailing, fishing, etc.), and other events. These events serve to further enhance other product themes.

Culinary - Includes wineries, breweries, distilleries, foodie/dining, and agri/aqua-tourism

Meetings - Refers primarily to facilities that serve the meetings market such as conventions, conferences, corporate meetings, trade shows, exhibitions, trainings/seminars, and other group events

Sports - Refers primarily to facilities that host sports events and tournaments, including youth, amateur, college, professional, minor league, and motorsports

Industry - Refers to products that leverage specific industry areas in which Virginia has a base. For Shenandoah Valley, this definition specifically refers to corporate base.

Commercial Attractions - Refers to tourism attractions designed for user entertainment and enjoyment and may not necessarily rely heavily upon inherent destination features. For Shenandoah Valley, this specifically refers to the higher-end/luxury attractions and family-oriented attractions (e.g. theme park). Higher-end/luxury attractions may include spas, resorts, golf courses, and other experiences with upscale elements targeted to an affluent market.

In addition, it should be noted that **cultural heritage** refers to the cultural and social characteristics of a region that are fundamental to evaluating a tourism destination. Culture consists of the beliefs, behaviors, objects, and other characteristics common to the members of a particular group or society. From a tourism perspective, visitors want to experience the local culture of a destination. This includes many components, such as art and music of the region, history, local crafts, traditions, style and types of local food, architecture, religion, and distinctive leisure activities. These are what make the cultural heritage of Virginia “authentic.” By its very nature, culture is interpreted by visitors in many ways. Each region will have the opportunity to further define the regional “cultural” lures, based on information in this plan.

Objectives and Strategies

Applicable objectives and strategies are presented for the five plan outcomes of Products, Pillars (infrastructure), Partnerships, Promotions, and Policies. Following the objectives and strategies are additional action steps specific to the region which are above and beyond the actions of the state level plan. Additional action steps should be read in conjunction with action steps of the state level plan.

Strategies in the plan are assigned a priority/timing as high or immediate action (denoted by red) and medium or mid-term action over the next five years (denoted by blue). The categorization of high or medium is both a function of priority and timing for the region. Those categorized as "high" can generally be characterized as existing or growing product areas that within the next five years should be further developed or enhanced in an effort to serve as (or support) primary draws. Those categorized as "medium" are areas that within the next five years may realistically need a longer time horizon to develop into a primary draw, those that may be more niche areas, or those that are generally complementary/auxiliary product experiences to the primary draws in the next five years.

Products

Nature & Outdoor Recreation

| Nature & Outdoors Objective: Visitor experiences are further developed which highlight Virginia's natural beauty and natural assets | | | |
|---|-----------------|--|-----------------|
| Strategy | Priority/Timing | Strategy | Priority/Timing |
| Develop, maintain, and expand outdoor trails and water trails | ● | Seek and maintain designations for National Scenic Byways and the Virginia Scenic Byways and Scenic Drives | ● |
| Continue to develop and enhance outdoor experiences at parks, forests, recreation areas, nature areas, and preserves | ● | Develop and enhance accommodations related to outdoor experiences | ● |
| Leverage Virginia's waterfront areas | ● | | |

Additional Regional Actions:

- Seek designations for Appalachian Trail Communities
- Leverage the Blue Ridge Parkway to connect outdoor experiences
- Explore the development or designation of adventure parks, which may include mountain biking, rope courses, climbing, zip lines, winter sports, and other activities. Balance adventure elements with relaxing or "soft" recreation experiences offered throughout the region's mountains, forests, and parks.
- Continue to leverage the prominence of the Shenandoah National Park
- Continue to leverage the Blue Ridge and Allegheny mountains for outdoor experiences for climbing, hiking, winter sports, etc. and fully utilize their vistas and backdrop for scenic outdoor experiences that allow for year-round (four-season) opportunities in the region.
- Explore opportunities to further leverage and promote the natural springs in the Allegheny Highlands area, including Warm Springs, Hot Springs, and Healing Springs and the historic Jefferson Pools
- Continue to promote and leverage Upper James River Trail
- Explore water trail development for the Jackson, Maury, and Shenandoah Rivers and ensure accessibility and amenities near the trail
- Ensure maintenance of the Blue Ridge Parkway and Skyline Drive designations
- Evaluate the need for additional cabins, camping, and lodges in strategic locations given the generally adequate availability of outdoor accommodations in the area
- Explore development of additional upscale-oriented lodging for the outdoors such as mountain lodges or resorts, which incorporate the character and nature of the region

Products (continued)

Towns/City Centers

| Town/City Centers Objective: Visitor experiences in town/city centers are improved to create attractive destinations | | | |
|--|-----------------|--|-----------------|
| Strategy | Priority/Timing | Strategy | Priority/Timing |
| Develop and enhance outdoor experiences in the town or city center | ● | Take steps to align with standards of the Virginia Main Street Program and National Main Street Program | ● |
| Enhance town/city center areas through development of the arts | ● | Encourage the development of enterprises that enhance and balance the town/city center's current offerings and increase vibrancy | ● |
| Establish and uphold guidelines for town/city center enhancement and redevelopment | ● | Develop transportation that allows for enhanced connectivity within and to the town/city center | ● |

Additional Regional Actions:

- Leverage nature and recreation opportunities prevalent in the area and tie in these opportunities to the town/city center area. This includes outfitter locations in the downtown area where activity/equipment is visible to visitors.
- Include outdoor demonstrations or sample equipment in the town/city center, which may include a climbing wall or temporary winter activities such as a half pipe or kid-friendly simulated cavern activities
- Ensure works of regional artists are displayed, including those that showcase the Civil War history of the region, various arts and music genres, outdoor features such as caverns, hikers along the

Appalachian Trail, youth culture in college towns, and iconic representations of the region

- Explore the development of business offerings to further support visitors, which may include the development of upscale hotel supply, outfitters, and unique dining and retail to balance offerings in destinations
- Explore the development of shuttle service from town to outdoor areas for one-way biking, hiking, and paddling trips and trolley service among historic towns
- Leverage US Route 11 as a connector of towns in the region, including Winchester, Staunton, Lexington, Harrisonburg, New Market, Salem, and Roanoke.

Products (continued)

History & Heritage

| History & Heritage Objective: History and heritage experiences are preserved, refreshed, and expanded | | | |
|---|-----------------|---|-----------------|
| Strategy | Priority/Timing | Strategy | Priority/Timing |
| Refresh history and heritage visitor experiences | ● | Continue to connect history experiences | ● |
| Invest in historic structures, sites, and attractions | ● | Enhance historical experiences through accommodations | ● |

Additional Regional Actions:

- Ensure history and heritage attractions, including Civil War sites and battlefields, include experiential elements and incorporate modern technology that educate and entertain visitors. Highlight history and heritage beyond the Civil War assets, spanning Native American history through the transportation age
- Enhance history and heritage through distinctive trail experiences in the region, which in addition to Civil War Trails, should include cross-theme history attractions, such as The Wilderness Road Heritage Trail
- Continue to utilize the architecture in the towns of the region, including Staunton, Harrisonburg, Winchester, and others, for historic accommodations such as hotels and bed & breakfasts
- Continue to showcase the region's history and heritage through events and festivals as well as personifying the culture of the region through performance, visual, and craft arts and culinary experiences
- Build upon the region’s industrial and transportation heritage: Virginia’s Rail Heritage Region

Arts & Music

| Arts & Music Objective: Visitor experiences related to music and arts (performance, visual, craft, etc.) are created and enriched | | | |
|---|-----------------|---|-----------------|
| Strategy | Priority/Timing | Strategy | Priority/Timing |
| Develop and enhance music and performance art venues | ● | Add art to public spaces | ● |
| Enhance and develop music and art trails | ● | Develop and enhance concentrated arts experiences | ● |

Additional Regional Actions:


- Explore the development and enhancement of performance venues that allow the region to further develop its music and performing arts presence, which may include sizable venues in Roanoke, venues in college towns, and temporary venues which leverage the seasons throughout the year

- Explore the development of art trails and music trails, which connect the region's towns. Explore opportunities to tie in wine, agriculture, history, and the outdoors with the trails, which may include cross-theme trails, clustered development, and physical trail development
- Explore the development of a music trail, which may be similar in concept to the Crooked Road experience, but offers visitors additional musical variety, including potential new and innovative music which may stem from the concentration of colleges in the region
- Utilize the Blue Ridge Parkway as a connector for arts experiences
- Ensure works of regional artists are displayed, including those that showcase various arts and music genres, college culture of a number of towns, the history and heritage of the region, such as Civil War history, and outdoors features, such as caverns, hikers

- along the Appalachian Trail, and iconic representations of the region
- Explore additional opportunities to tie in art and music experiences with the region's colleges and universities and develop additional arts and cultural districts in the region's towns
- Explore the development of an arts commune in a mountain environment as a place for artists to live, work, and display work and hold events for the public
- Continue to seek designations for arts & cultural districts
- Encourage attractions to collaborate with artisans to show and sell work

Products (continued)

Events

| Events Objective: Events which leverage Virginia's tourism assets are created and expanded | |
|--|--|
| Strategy | Priority/Timing |
| Enhance and develop events which promote the key visitor themes |  |

Additional Regional Actions:

- Develop and enhance signature events for the region. These signature events should build upon, promote, and reinforce key visitor themes and showcase the authenticity and character for the region, including outdoors, history, music and arts, culinary.
- Continue to leverage the fall visitor season with events featuring food, wine, and the outdoors
- Use events to extend visitor seasons and attract visitor seasons during the traditional off-season
- Tie in multiple visitor themes in events, where appropriate
- Explore various types of events including winter-sports events at ski resorts and events attracting the college population. The regions multiple battlefields lend themselves to position athletic, culinary, or music competitions as "Battles" taking place at or near battlefields, such as a signature Battle of the Bands competition.

Products (continued)

Culinary

| Culinary Objective: Culinary visitor experiences (wineries, agri-tourism, dining, etc.) are established and expanded | | | |
|--|-----------------|--|-----------------|
| Strategy | Priority/Timing | Strategy | Priority/Timing |
| Expand wine tourism experiences | ● | Build reputation as a destination for dining and continue to develop unique restaurant experiences | ● |
| Develop tourism related to Virginia's growing breweries and distilleries | ● | Develop and expand trails to enhance culinary experiences | ● |
| Develop and enhance visitor experiences related to Virginia's agriculture and aquaculture products | ● | | |

Additional Regional Actions:

- Continue to grow wine tourism experiences with opportunities to differentiate wineries in the region as mountain experiences. Leverage history, arts, music, agri-tourism, the outdoors, and towns in the region to enhance winery experiences through trails and events
- Continue to build agri-tourism experiences utilizing a relative concentration of agri-businesses in the region
- Explore opportunities to enhance and develop agri-tourism attractions, showcasing farm heritage of the region, education, and hands-on experiential opportunities for visitors
- Continue to use events and festivals as a platform to enhance culinary profile of the region, tying in heritage, arts, music, and other visitor themes
- Tie in arts with agricultural experiences
- Leverage strong towns to further cluster and develop distinctive dining experiences for visitors
- Leverage the region's agri-tourism to build distinctive farm-to-table dining experiences and continue to develop unique dining experiences
- Develop culinary trails, including wine, agri-tourism, and food which tie in other visitor themes, towns, music, and arts
- Develop outdoor trails, which connect culinary experiences, and utilize the Blue Ridge Parkway to connect culinary experiences

Meetings

| Meetings Objective: Facilities to attract meetings (conventions, conferences, corporate meetings, trade shows, exhibitions, trainings/seminars, etc.) are built and improved to maximize economic impact and community value | | | |
|--|-----------------|--|-----------------|
| Strategy | Priority/Timing | Strategy | Priority/Timing |
| Develop and expand group event facilities in strategic locations | ● | Enhance meeting facilities through supporting elements | ● |

Additional Regional Actions:

- Explore opportunities to expand existing meeting space at venues in the region (hotels, resorts, etc.) based on feasibility of market demand
- Explore mountain lodging retreats which incorporate the character of the area and are equipped for corporate and association conferences, reunions, youth group events, and destination wedding events. Facilities in the region have the opportunity to be

- upscale or value-oriented for youth events, and should be encouraged to be eco-oriented to tie in the natural environment.
- Explore opportunities to develop traditional hotel accommodations with meeting space and conference/event space in town/city centers or in connection with universities in the region
- Explore opportunities and feasibility of developing larger meeting venues

Products (continued)

Sports

| Sports Objective: Facilities for participant and spectator sporting events are enhanced and developed | | | |
|---|-----------------|---|-----------------|
| Strategy | Priority/Timing | Strategy | Priority/Timing |
| Develop and enhance youth and amateur athletic facilities | ● | Develop and enhance college and elite athletic facilities | ● |

Additional Regional Actions:

- Explore enhancement of youth/amateur sport facilities in strategic locations, which given infrastructure and location, may have potential in Roanoke/Salem area
- Continue to leverage visitor opportunities from college athletics, James Madison University and Virginia Military Institute, related

to visiting teams, fans, and family members and encourage facility enhancement, as needed, to ensure continued sports program strength

Industry

| Industry Objective: Other visitor experiences, which leverage Virginia's economic strengths and specialized industries are enhanced and created | |
|---|-----------------|
| Strategy | Priority/Timing |
| Leverage strong corporate and business base | ● |

Additional Regional Actions:

- Leverage corporate base in the region, including Roanoke's metropolitan presence, as a source for business travel and ensure amenities, including lodging, dining, and entertainment are available for corporate travelers and additional activities are available for opportunities to extend trips

Products (continued)

Commercial Attractions

| Commercial Attractions Objective: Commercial attractions are increased | | | |
|--|-----------------|--|-----------------|
| Strategy | Priority/Timing | Strategy | Priority/Timing |
| Explore the development of family-oriented commercial attractions | ● | Explore the development of commercial attractions designed for a higher-end, luxury market | ● |

Additional Regional Actions:

- Explore the development of family-oriented commercial attractions. With the visitor infrastructure and resident population, the Roanoke area may be positioned for themed developments, but other locations could be explored with an opportunity to further draw from the D.C area market. In addition to themed attractions, family attractions may include the development or enhancement of an outdoor adventure park oriented to kids that includes smaller scale activities suitable to children or beginners, such as a smaller zip line or ropes courses, as well as traditional kid-friendly elements including play areas and water features.
- Explore the development of higher-end attractions, which incorporate the character and nature of the region. This may include additional mountain resorts with winter activities and spa which allow visitors to experience the outdoors and in a higher-end environment and include additional experiential features of on-site outfitters and guide, and customized outdoor adventure.
- Explore higher-end accommodations within town/city area which leverage, history, art, architecture and other features of the area

Pillars

| <i>Strategy</i> | <i>Priority/Timing</i> | <i>Strategy</i> | <i>Priority/Timing</i> |
|---|------------------------|--|------------------------|
| <i>Transportation Objective: Strategies to improve transportation are developed and executed</i> | | | |
| Initiate concerted strategy to improve road transportation for tourism | ● | Explore increased air access, rail, and mass transit for strategic locations | ● |
| <i>Wayfinding Objective: Visitor wayfinding is improved</i> | | | |
| Ensure signage and visitor information is visible and available through multiple points | ● | Invest in technology infrastructure (Wi-Fi, cell reception, GPS, etc.) | ● |
| Reinforce community sense of place | ● | | |
| <i>Education & Training Objective: Tourism education and training programs are continued and enhanced</i> | | | |
| Enhance training and education of tourism workforce | ● | Ensure tourism education programs are continued for students | ● |
| <i>Research Objective: Tourism research is available which supports tourism development and marketing initiatives</i> | | | |
| Continue to engage in or obtain research on visitors | ● | | |

Additional Pillar Action Steps:

- As a region, ensure tourism stakeholders are involved with other regional leaders in transportation planning initiatives, including improvements or expansions of highway, rail, and air access. This includes enhancements to I-81 as well as contributing to transportation solutions related to alleviating traffic through corridors which channel visitors from D.C.
- Continue to work with Blue Ridge Parkway authorities related to on-going improvement initiatives
- Explore opportunities for additional rail access to the region, in conjunction with VDOT's I-81/Route 29 Intercity Passenger Rail Project intended to extend passenger rail service, increase capacity, and improve service reliability between Bristol, Roanoke and Lynchburg with connections to Richmond and D.C.
- Ensure tourism stakeholders come together to work with VDOT related to signage issues

Partnerships

| <i>Strategy</i> | <i>Priority/Timing</i> | <i>Strategy</i> | <i>Priority/Timing</i> |
|---|------------------------|---|------------------------|
| <i>Tourism Organizations Objective: Organizations to lead tourism initiatives are strengthened or formed</i> | | | |
| Create and strengthen tourism organizations | ● | | |
| <i>Government Objective: Collaboration among government organizations at the local, state, and federal levels for tourism initiatives is improved</i> | | | |
| Increase communication, planning, and coordination among government entities | ● | | |
| <i>Connectivity Objective: Connectivity among tourism attractions, businesses, and destinations is improved through partnering</i> | | | |
| Develop and enhance communication and partnering among Virginia tourism industry stakeholders | ● | Increase coordination and collaboration among stakeholders that share interests in tourism assets outside of Virginia | ● |

Additional Partnership Action Steps:

- Continue to strengthen regional organizations such as the Roanoke Valley CVB and the Shenandoah Travel Association and build capacity for local DMOs in the region with tourism professionals dedicated to tourism marketing and development
- Continue to improve intra-government coordination and collaboration among the multiple destinations as stakeholders
- work as a region to address signage issues with VDOT, major regional events, and other tourism initiatives
- Enhance collaboration among attractions through additional trail, package, and itinerary development based on key visitor themes for the region, including nature/outdoors, history/heritage, town/city centers, music, arts, wine, agri-tourism, and others

Promotions

| <i>Strategy</i> | <i>Priority/Timing</i> | <i>Strategy</i> | <i>Priority/Timing</i> |
|--|------------------------|---|------------------------|
| <u>Government, Business & Resident Objective:</u> Efforts to promote and educate government leaders, the business community, and residents on tourism initiatives and benefits are continued | | | |
| Communicate and inform local and state government officials on tourism benefits and initiatives | ● | Communicate and inform tourism industry stakeholders, including partners, the business community, and residents on tourism initiatives and benefits | ● |
| <u>Economic Development Objective:</u> Tourism promotion efforts for economic development are enhanced | | | |
| Enhance promotion of Virginia to potential tourism investors, businesses, and developers to generate economic development | ● | | |
| <u>Connectivity Objective:</u> Virginia is positioned based on the lures of tourism assets with a strategy to improve connectivity among destinations, attractions, and visitor themes | | | |
| Enhance and create visitor itineraries and packages | ● | Enhance and develop themed trails | ● |
| <u>High Impact Markets Objective:</u> Visitor markets with high impact continue to be targeted, while new markets are explored | | | |
| Continue to identify and evaluate key geographic and thematic target markets for promotions | ● | | |

Additional Promotion Action Steps:

- Develop communication plans for government officials, tourism stakeholders, businesses, and residents and continue to educate and inform officials on tourism benefits (qualitative and quantitative based on research) as well as ongoing initiatives for economic development through various means
- Identify and engage key opinion leaders in the region, which may help to serve as ambassadors for the tourism industry and aid in the education and promotion of tourism to government leaders, funding efforts, and development initiatives
- Work with economic development corporations on tourism development initiatives and investment attraction for the region
- Leverage economic strength of Roanoke area as well as colleges/universities in the region for tourism investment and economic development
- Enhance collaboration among attractions through additional trail, package and itinerary development, based on key visitor themes for the region, including nature/outdoors, history/heritage, town/city centers, music, arts, wine, agri-tourism, and others
- Explore theme trail development to enhance destination and attraction connectivity, incorporating the length of the region from Winchester to Salem, as well as the Alleghany Highlands.
- Leverage geographic position on the bordering West Virginia for promotional purposes on a strategic basis
- Continue niche market promotions where appropriate, including the niche for Civil War enthusiasts as well as promotions for other major visitor themes

Policies

| <i>Strategy</i> | <i>Priority/Timing</i> | <i>Strategy</i> | <i>Priority/Timing</i> |
|---|------------------------|---|------------------------|
| Funding Objective: Funding is available for tourism growth | | | |
| Enforce policy for use of tourism tax revenues collected by localities | ● | Create sustainable funding policies for tourism marketing and development for communities | ● |
| Tourism Policies and Programs for Assistance Objective: Tourism policies and programs which provide assistance for growth and development are enhanced | | | |
| Continue and enhance programs which support tourism marketing | ● | Continue to evaluate policies which encourage an attractive tourism business environment | ● |
| Continue and explore improvements for programs which support tourism product development | ● | Educate public and private sector stakeholders on legislative policies and programs impacting tourism | ● |
| Explore establishment of assistance program for tourism businesses | ● | | |
| Tourism Policy for Government Objective: Policy for government cooperation is created to assist and support the tourism industry | | | |
| Establish policy for cooperative guidelines and arrangements for cohesive government approach to the tourism industry | ● | | |
| Preservation Objective: Policies and programs designed to preserve historical, cultural, and natural assets are maintained | | | |
| Uphold policies and programs which promote sustainability and preservation of historical, cultural, and environmental assets | ● | | |

Additional Policies Action Steps:

- Explore the development of a tourism council at the community level in localities where policy enforcement is recognized as an issue. The council should be comprised of public and private stakeholders that are responsible for overseeing the use of tourism tax revenue in the community.
- Identify local liaisons or advocates which can work to address policies and programs, including the creation of Tourism Zones and national grant and assistance programs
- Continue to explore alternative creative funding solutions to achieve community solutions and work with local governments, where appropriate, to secure dedicated funding that could be reinvested for tourism marketing and development purposes. Garnering widespread support from tourism stakeholders and an advocacy effort of the industry will be important in influencing government leaders. For tourism development, the formation of a tourism development fund at local level could be explored.
- Continue to evaluate business policies, ordinances, codes, etc. at the local level that may impact visitation and tourism business growth. Local policies and their enforcement may vary throughout the state, and it is critical for local stakeholders to collaborate on efforts to create or amend policies which will positively impact tourism.
- Explore the development of tourism business assistance programs, such as incubators, through local governments, small business administrations, and economic development departments, as appropriate, to seek support and assistance for tourism businesses
- Continue to engage in preservation and sustainability efforts at the local level, regarding historical, cultural, and environmental assets,

including seeking Virginia Green Certifications and LEED certifications for new development

- Continue to evaluate permitting policies with Federal Agencies.

Key Stakeholders

The below list of regional and universal stakeholders illustrates the types of stakeholder groups that may be involved in implementing the State Tourism Plan and the region's strategies and action steps. The lists are comprehensive, but not necessarily exhaustive. In addition, regional stakeholders include local and regional government offices, economic development offices and planning district commissions. The list of regional stakeholders highlights organizations specific to the Shenandoah Valley region, including those organizations identified as having tourism marketing representatives, while universal stakeholders includes a broader list comprised of key organization types, statewide organizations, state government entities, and federal organizations.

Regional

- Alleghany Highlands Chamber of Commerce and Tourism
- Berryville Main Street
- Botetourt County Office of Tourism
- City of Waynesboro Tourism
- County of Bath Tourism Office
- Craig County Tourism Commission
- Elkton Welcome Center
- Front Royal Department of Tourism
- Harrisonburg Downtown Renaissance
- Harrisonburg-Rockingham Chamber of Commerce
- Harrisonburg Tourism and Visitor Services
- Highland County Chamber of Commerce
- Lexington and the Rockbridge Area Tourism Development
- Luray Downtown Initiative, Inc.
- Luray-Page County Chamber of Commerce & Visitor Center
- Roanoke Regional Airport
- Roanoke Valley Convention & Visitors Bureau
- Salem Visitors Center
- Shenandoah County Tourism
- Shenandoah Fairs and Festivals Alliance
- Shenandoah Valley Battlefields Association
- Shenandoah Valley Music Festival
- Shenandoah Valley Travel Association
- Shenandoah Valley Wine Growers Association
- Staunton Convention & Visitors Bureau
- Staunton Downtown Development Association
- Strasburg Chamber of Commerce
- Virginia's Western Highlands
- Waynesboro Downtown Development, Inc.
- Winchester-Frederick County Convention and Visitors Bureau
- Winchester Old Town Development Board

Universal

- Art/Music Programs
- Artisan Center of Virginia
- Attraction Management
- Chambers of Commerce
- Colleges (including community)/Universities
- Council on Virginia's Future
- Department of Agriculture and Consumer Services
- Department of Business Assistance
- Department of Conservation & Recreation
- Department of Environmental Quality
- Department of Forestry
- Department of Gaming & Inland Fisheries
- Department of Historic Resources
- Department of Housing & Community Development
- Department of Rail and Public Transportation
- Department of Transportation
- Destination Marketing Organizations
- Downtown Development Associations
- Educational Institutions
- Environmental Organizations
- History Foundations/Non-Profit Organizations
- Horse Breed Associations
- Hospitality Associations

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- Keep Virginia Beautiful
 - Local Arts Organizations
 - Local Downtown Development Associations
 - Local Government (Town/City/County)
 - Military Associations
 - National Park Service
 - National Refuge Service
 - National Trust for Historic Preservation
 - Non-Profit Arts & Music Organizations
 - Non-Profit Organizations
 - Planning District Commissions
 - Preservation Virginia
 - Private Businesses

- Sports Associations
- State Government Departments
- State Legislators
- Urban Forest Council
- Virginia Association of Convention & Visitors Bureaus
- Virginia Business Incubation Association
- Virginia Chamber of Commerce
- Virginia Commission for the Arts
- Virginia Community Development Corporation
- Virginia Downtown Development Association
- Virginia Economic Development Partnership

- Virginia Farm Bureau
- Virginia General Assembly
- Virginia Green
- Virginia Historical Society
- Virginia Horse Shows Association
- Virginia Hospitality & Travel Association
- Virginia Marine Resources Commission
- Virginia Music Associations
- Virginia Tech Community Design Assistance Center
- Virginia Tourism Corporation
- Virginia Wine Board
- Virginia Wine Marketing Office

Regional Strategy Takeaways

It is the combination of the tourism products which create a destination, and as such, these combined strategies are meant to build the Shenandoah Valley region as a destination in a sustainable manner and maintain the character and authenticity of the region. The strategies outlined are intended to build upon the region's core strengths, enhance visitor experiences, and ultimately enable the region to increase tourism. When unique and genuine tourism experiences are connected or clustered in offering, destination appeal and strength is increased, allowing the region to compete more effectively against other destinations. The Shenandoah Valley region has the opportunity to do just this by growing its tourism asset base and connecting visitor experiences to increase tourism and enhance competitiveness.

The Shenandoah Valley region has the opportunity to further leverage its beauty, natural assets, and outdoor recreation experiences in combination with the rich history and growing culinary experiences as a four-season destination in the next five years. The region's mountainous landscape, parks, trails, caverns, and well-known assets such as Shenandoah National Park, Appalachian Trail, and Blue Ridge Parkway offer adventure and challenge for outdoor enthusiasts in addition to soft recreation for families and those seeking relaxing outdoor getaways. Moreover, the history of the region, authentic main streets and small town character, arts, music, wine and agriculture experiences, including farm-to-table dining, help define the region and add significant depth of the visitor experience. The region also has the opportunity to leverage its location near Washington D.C. in the northern end of the region and take advantage on the I-81 route running through the region. Integrating and connecting these visitor experiences will be an important competitive differentiation element as the combination of the outdoors, history, arts, culinary, and other visitor attractions increases the strength of the Shenandoah Valley region as a destination.

High-Level Regional Takeaways:

- Leverage outdoors and history as unifying themes for region, further developing relaxing and active outdoor experiences and enhancing historical attractions for interactive experiences
- Build recognition of tourism assets and mountain towns
- Cluster product development and connect attractions and destinations for concentrated experiences, including outdoors, heritage, arts, music, and culinary experiences
- Leverage younger population base in college towns with music, outdoor, and entertainment attractions
- Maintain character and authenticity and create new development in a sustainable manner
- Enhance stakeholder cooperation and collaboration