

PricewaterhouseCoopers LLP

Virginia State Tourism Plan

Virginia Tourism Corporation

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Introduction

PricewaterhouseCoopers LLP ("PwC") was engaged by the Virginia Tourism Corporation ("VTC") to develop a statewide tourism plan that will guide the development of Virginia's tourism industry and serve as a blueprint for communities to develop products that will provide a competitive edge while also preserving the authenticity of its regions and the Commonwealth. The plan enables communities to build upon Virginia's diverse tourism assets and success as a destination while preparing it to compete in the global economy. Ultimately, the plan is designed to increase economic development through tourism.

This plan identifies a vision for the Commonwealth's tourism industry and establishes a set of desired outcomes, objectives, and strategies for both the public and private sectors to achieve this vision. This direction for tourism identifies the key lures or areas of focus for tourism products on statewide and regional bases to increase competitiveness. It also sets a framework for the tourism infrastructure, partnerships, promotions, and policies needed to support tourism growth.

Why Virginia Needs the State Tourism Plan?

- Virginia is highly diverse in its tourism experiences, yet focus is needed to enable growth.
- Virginia is committed to tourism; and future efforts to grow tourism need to be strategically planned in a cohesive manner.
- Virginia needs to build on its tourism asset base and its successes, yet continue to be innovative and competitive.
- Global competition for tourists continues to increase; and a plan is needed to ensure Virginia remains competitive.
- Virginia has the opportunity through this plan to unite as a state and chart its path towards being a world-class place to visit and live.

What is the State Tourism Plan?

- This state tourism plan is a blueprint that identifies areas of development and growth for the tourism industry.
- The blueprint is an overall plan for the state that will also provide focus to Virginia's **nine regional tourism areas**.
- The plan looks at where the tourism industry needs to go over the next five years to provide a competitive edge and increase economic development through tourism.
- The plan is industry driven, built on the vision and input gathered from more than 1,300 of **Virginia's tourism stakeholders**.

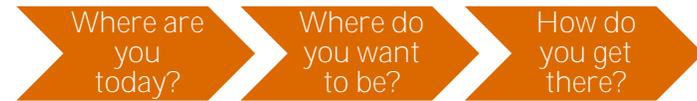
State Tourism Plan Features:

- Five-year blueprint for tourism direction in the Commonwealth with a regional focus
- Direction that will provide competitive edge and increase economic development through tourism
- Built upon the vision and input of Virginia's tourism industry stakeholders
- Tourism strategy, not a marketing plan with advertising and slogans

Methodology

PwC developed and implemented a customized approach to develop a statewide plan with a regional focus, built on input from a broad group of tourism stakeholders. The plan process focused on studying three critical areas: **1) Where are you today? 2) Where do you want to be?**

3) How do you get there? Within these three areas, analyses of the industry and market were conducted along with a visioning process where stakeholder input was gathered to ultimately prepare the tourism strategic plan.



Research was a critical step in developing the plan. PwC undertook an extensive research effort involving two key areas: the first involved primary research through personal visitor experience and reaching out to tourism stakeholders in Virginia to understand the current state of tourism in Virginia, including regional lures, challenges, and desired vision for the next five years; and the second involved an analysis of the tourism industry on a global, national, and state level basis, including trending visitor volume, spending, tourism funding, traveler preferences, competitive comparisons, and tourism assets inventory. These research and analysis efforts were conducted in parallel to each other, whereby PwC analyzed the results of each effort to develop the basis for the tourism development plan.

PwC gathered input from industry stakeholders through a variety of methods, including an on-line survey, group workshops, and individual discussions, which covered the diversity of the industry from each region. Stakeholders included representatives from VTC, state agencies (Department of Conservation and Recreation, Department of Transportation, Department of Game and Inland Fisheries, Virginia Economic Development Partnership, and others), representatives of the State General Assembly, destination marketing organizations (DMOs), tourism associations, regional/local government leaders, tourism attraction management (wineries, theme parks, parks, agri-tourism, etc.), hoteliers, meeting facilities, arts & cultural organizations, national parks, developers, airport & transportation entities, corporations, colleges/universities, tour companies, event organizers, sports organizations, sports venues, and others.

Stakeholder Input:

- Input from more than 1,300 Virginians
- Workshops - 180 participants in 10 sessions
- Individual Discussions - 140
- Survey – More than 1,000 completed responses

Stakeholder input and market and industry analysis established a comprehensive view of Virginia's diverse tourism industry, allowing PwC to gain an understanding of the tourism market, socio-cultural character, and its key issues related to tourism products, infrastructure, partnerships, promotions, and policies of the Commonwealth and its regions. These elements culminated into the tourism development plan for the Commonwealth.

With input from primary and secondary research, including tourism industry stakeholders, numerous factors formed the basis of the State Tourism Plan for Virginia, 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 **State's tourism** strategy, based on input from approximately 1,300 responses statewide.

Tourism Assets: Virginia'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 **state'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** throughout the state, 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 destination marketing organizations, existing tourism plans from numerous destinations throughout the state, 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 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 state, 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 state 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.

Additional 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, 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, 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, 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. 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.).

Where Are You Today?

A situational analysis of Virginia's tourism industry is presented summarizing its size, growth, visitor profile, and key strengths and challenges.

Tourism Economy

Virginia's rich beauty and diverse landscape from mountains to beaches, combined with its deep-rooted history and a variety of culinary, cultural, and business opportunities has enabled the Commonwealth to grow its tourism industry into an economic driver valued at \$20.4 billion from domestic expenditures in 2011.

Virginia's tourism industry continues to recover from the economic recession with spending in 2011 exceeding pre-recession levels. Spending increased eight percent over 2010. In addition, visitor expenditures from international travelers totaled nearly \$390 million in 2011. This represents an increase of 21 percent over 2010. In 2011, the tourism industry supported 207,000 jobs and **contributed \$1.3 billion to state and local taxes.** Virginia's tourism industry ranked fifth for non-farm industry by employment in 2011.

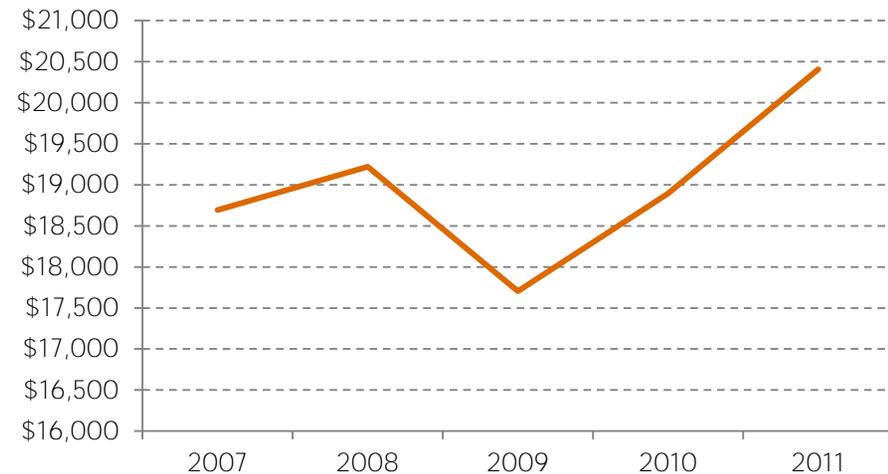
Virginia's tourism industry is supported by a relatively strong economy and a generally high quality of life, although some areas of the state continue to be economically challenged. Virginia is the 12th most populous state with a population of nearly 8.1 million. Virginia has achieved an unemployment rate more than two percentage points below the national average (estimated at 5.9 percent). The Commonwealth is home to 25 Fortune 500 companies, ranking sixth among all states in the U.S. With proximity to Washington D.C., government and government-related business is a major economic driver.

With low business taxes, moderate corporate income taxes, low price of workers' compensation and unemployment insurance, a highly educated workforce, and major national and international gateway connections, Virginia consistently ranks as one of America's most business-friendly states. With a strong structure for business, Virginia is well positioned to support the growth of tourism.

Tourism Industry Highlights (2011):

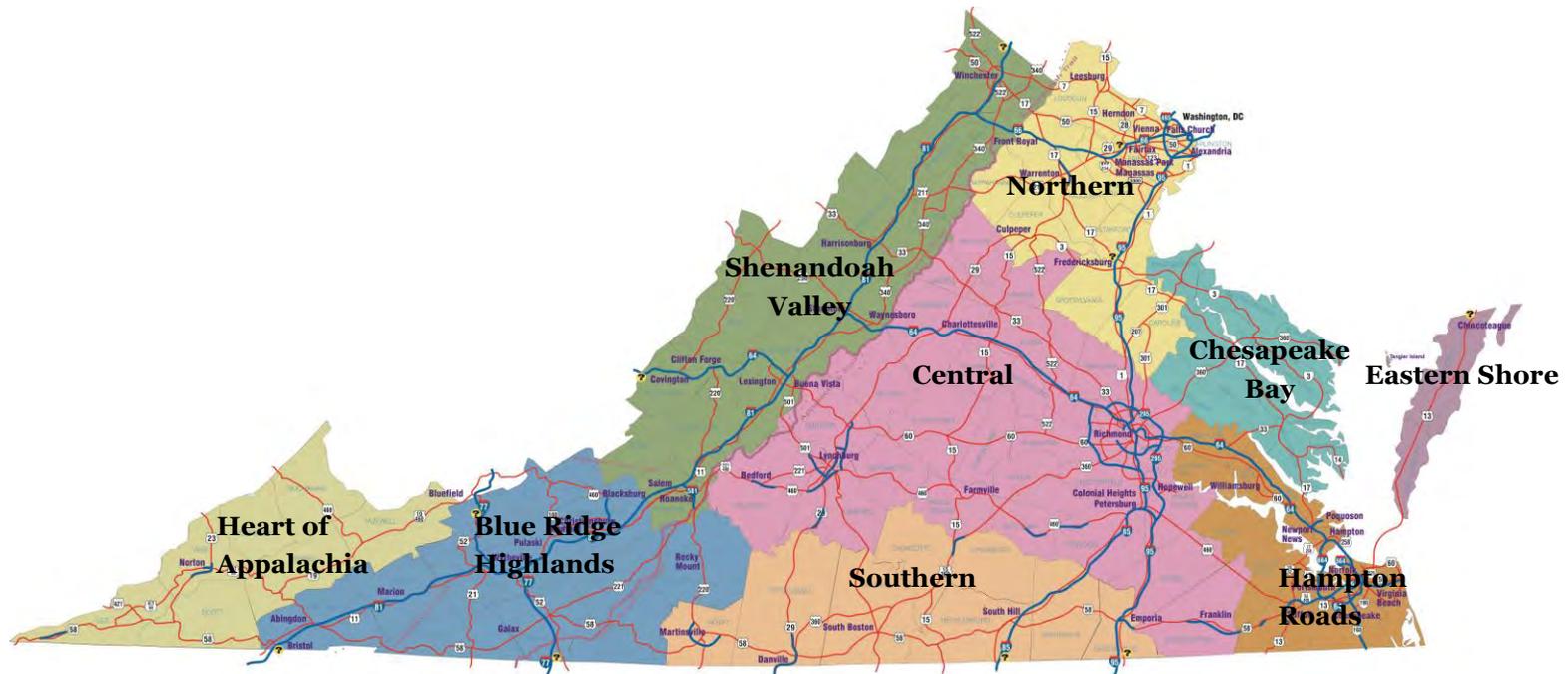
- Economic impact of \$20.4 billion in 2011
- Growth of 8% over 2010
- Exceeding pre-recession spending levels
- Spending of \$390 million from international visitors, an increase of 21% over 2010
- Supports 207,000 jobs
- Fifth largest non-farm industry
- Contributes \$1.3 billion to state and local tax revenue

Virginia Tourism Expenditures (millions)



Where are you today - Tourism Geography

Virginia benefits from its strategic location in the southern part of the Mid-Atlantic States. The proximity of Washington D.C. at the state's northern border is a significant advantage for the state from a tourism and economic development perspective. Set within the Appalachian Mountains at its western edge, it borders West Virginia and Kentucky, while Tennessee and North Carolina sit south of the state, and the Chesapeake Bay and Atlantic Ocean serve as the state's eastern borders. The following map highlights Virginia's nine tourism regions, which include the Blue Ridge Highlands, Central Virginia, Chesapeake Bay, Eastern Shore, Hampton Roads, Heart of Appalachia, Northern Virginia, Shenandoah Valley, and Southern Virginia.



Shenandoah Valley, and Southern Virginia. The map also highlights the key interstate and state road corridors throughout the state. Overall, Virginia is accessible through eight commercial airports, 22 Amtrak stations, and a portion of six major interstates (64, 66, 77, 81, 85, and 95). Virginia benefits from the location of Dulles International, the primary international airport serving D.C., in Chantilly, and the upcoming extension of the Metro to Dulles will further increase convenience and connectivity. However, road congestion is cited as a challenge for visitors and residents, particularly in the Northern Virginia and Hampton Roads regions. Traffic congestion impacts visitation and diminishes the potential for cross-visitation among destinations. This transportation challenge is a potential limiting factor for future tourism growth.

Signage is also recognized as a challenge among stakeholders. In particular, stakeholders noted that working with the Virginia Department of Transportation to obtain signage was a challenge.

Where are you today - Virginia Visitors

With Virginia's geographic location, it is natural for the top domestic markets to be visitors from North Carolina and Maryland. Other top markets include New York, Pennsylvania, and Florida. In addition, Virginians travel frequently within the state accounting for the largest share of travelers. International visitors are also prevalent in Virginia. In 2011, spending by overseas visitors reached nearly \$390 million, up 21% over 2010. Canadian traveler expenditures reached nearly \$150 million, an 11.3 percent increase over 2010.

While visiting with friends and family are the most frequently cited activities by Virginia visitors, other top activities included shopping, rural sightseeing, visiting historic sites/churches, fine dining, visiting museums, visiting state/national parks, urban sightseeing, and visiting the beach. In terms of the characteristics of travelers in Virginia, 79 percent are between the ages of 25 and 64, and 65 percent have a household income exceeding \$50,000. Couples represent the largest segment of travelers at 41 percent of Virginia visitors, and over two-thirds of visitors stayed for four or fewer days.

The most visited months during the year are July and August. Seasonality remains a challenge in the state, particularly in certain areas of the state.

Origin	
Virginia	32%
North Carolina	10%
Maryland	6%
New York	6%
Pennsylvania	5%
Florida	5%
New Jersey	3%
Ohio	3%
California	3%
Georgia	3%

General Activities / Attractions	
Visiting relatives	30%
Visiting friends	16%
Shopping	15%
Rural sightseeing	13%
Historic sites/churches	12%
Fine dining	11%
Museums	10%
State/National Park	9%
Urban sightseeing	9%
Beach	8%

Source: VTC

Month of Travel	
July	12%
August	11%
September	7%
October	9%
November	7%
December	8%
January	5%
February	6%
March	9%
April	10%
May	9%
June	9%

Where are you today - Tourism Products

Diversity - One of Virginia's strengths as a destination is its diversity of tourism experiences. Whereas many other states are recognized by a single leading "lure" or personality (e.g., Florida as a beach destination or Colorado as a ski destination), Virginia's geographic diversity lends itself to a wide variety of visitor experiences year-round from the Eastern Shore's unspoiled beaches and shoreline to the Blue Ridge Mountains, offering outdoor mountain recreation and scenery.

History & Heritage - Set within diverse geographic landscape, Virginia's history and heritage is the outstanding tourism element in the state. The unique colonial and Civil War history as well as presidential, Appalachian, music, frontier, civil rights, African American, Virginia Indians, military, maritime/watermen, coal, and tobacco history and heritage are shown through sites, museums, attractions, towns, architecture, and nature. In fact, there are more than 2,800 registered historic places, 100 Civil War battlefields, 160 historic homes and plantations, 215 historical museums, history-themed trails, and countless historical events and festivals for visitors to experience Virginia's heritage. Virginia is home to a number of nationally recognized assets, including Colonial Williamsburg, Mount Vernon, Jamestown, Monticello, and Arlington National Cemetery, amongst others. Early Virginia Indian culture can be experienced at the Mattaponi Museum & Minnie HA HA, Pamunkey Indian Museum, and the Monacan Indian Nation Ancestral Museum, to name a few. Civil Rights history can also be experienced through the Civil Rights in Education Heritage Trail, the Virginia Civil Rights Memorial, and the Robert Russa Moton Museum. However, a continual challenge for historic destinations across the globe is ensuring appealing and relevant visitor experiences.

Nature & Outdoor Recreation - Virginia's natural beauty and opportunity for outdoor recreation are prevalent throughout the state. There are 35 state parks and 48 national parks and forests, including the Shenandoah Valley National Park, the George Washington & Jefferson National Forests, and the Breaks Interstate Park, often referred to as the "Grand Canyon of the South," just to name a few. Virginia's coastal areas, beaches, and numerous lakes and rivers offer opportunities for water recreation. There are numerous trails and water trails, including the longest section of the Appalachian Trail, the Virginia Birding and Wildlife Trail which blankets the state, Wilderness Road Trail, Virginia Creeper Trail, Bike 76 Route Trail, Captain John Smith Water Trail, and the Upper James Water Trail, among others. In addition to a scenic environment for relaxing getaways, Virginia offers outdoor recreation for hiking, biking, rafting, paddling, climbing, horseback riding, hunting, fishing, boating,

Tourism Lures & Strengths:

- Tourism asset diversity - mountains, history, beaches, arts, culture, wine, and more
- Scenic beauty and outdoor recreation - relaxing getaways and opportunity for outdoor adventure, including hiking, biking, paddling, fishing, boating climbing, wildlife, equestrian, caverns, and others
- History - Significant colonial and Civil War history as well as civil rights, presidential, Appalachian, music, frontier, African American, Virginia Indians, military, maritime/watermen, coal, tobacco, etc.
- Nationally-recognized assets
- Over 200 wineries and 25 wine trails
- Adjacent to Washington D.C.
- Corporate base
- 8 commercial airports, including Dulles
- Small towns and main streets
- Overall economic strength of state and business-friendly environment
- Strong university presence
- Strong state brand recognition and state name

and other outdoor activities. There are also 14 caverns and other natural formations, such as Luray Caverns and Natural Bridge, and five national scenic byways, including Skyline Drive, the Blue Ridge Parkway, and Colonial Parkway, that also provide a unique opportunity for visitors to experience the natural scenery, beauty, and fall foliage.

Arts & Music - Virginia also possesses a growing creative economy built on musical and artistic roots and combined with modern culture. From mountain, folk, and bluegrass music to world class art museums, galleries, and theatres, there are many opportunities to experience the cultural arts. Additionally, 25 designated Main Street communities and other towns and cities throughout rural and urban areas offer genuine downtown charm and unique shops, galleries, restaurants, events, and festivals that help define the artistic culture present throughout the Commonwealth.

Culinary - The Virginia climate and landscape provides an ideal environment for the agriculture industry. Virginia has emerged as a significant wine destination, ranked as one of the top ten wine destinations worldwide in 2012 by Wine Enthusiast Magazine. More than 200 wineries and 25 wine trails provide an opportunity for visitors to experience the culinary industry first hand. Similarly, breweries and distilleries are also growing in the state with more than 50, providing an opportunity for tourism growth in this area as well. More than 220 farmer markets and 350 agri-tourism attractions further enhance the farm-to-table movement that has grown in popularity. These, along with a variety of dining experiences, are offered in restaurants throughout the Commonwealth.

Sports - Virginia benefits from numerous colleges and universities throughout the state, including those such as Virginia Tech, University of Virginia, Old Dominion, and Virginia Commonwealth University that provide opportunities for sports fans. In addition, minor league teams, including the Norfolk Tides and Danville Braves offer additional spectator sport opportunities. With four Sprint Cup NASCAR races at Martinsville Speedway and Richmond International Raceway each year, an additional two races at the Bristol Motor Speedway in nearby Bristol, Tennessee, and countless other races throughout the Commonwealth, motorsports also add to Virginia's sports landscape. In addition, Virginia International Raceway (VIR) hosts events such as the Grand-Am Rolex Sports Car Series and the American Le Mans Series.

Meetings - Approximately 1,500 hotels with more than 150,000 rooms, in addition to timeshares, cabins, cottages, B&Bs, and inns, provide a sizable lodging supply, although certain areas of the state may be underserved in terms of accommodation supply. Furthermore, with nearly two million square feet of meeting space in convention and conference venues, and an additional 1.2 million square feet of hotel meeting space, Virginia has group infrastructure to attract meetings and help support the corporate base. Within a highly competitive meetings market and a

Key Challenges:

- Challenge to keep history appealing and relevant
- Traffic congestion and its potential limitation for future growth
- Limited major visitor anchors statewide
- Lack of connectivity among themes/attractions/destinations in some locations
- Seasonality, particularly in some areas of the state
- Some economically challenged areas of the state
- Limited accommodations in some areas of the state
- Strong brand, but some confusion of meaning
- Uneven levels of tourism maturity across state

slowly recovering economy, there is market saturation nationally, but opportunities may exist for communities in Virginia to gain greater market share and serve local event needs.

Competitive Considerations - While Virginia is highly diverse and its destinations are able to offer a variety of experiences, this diversity may somewhat hinder the ability for Virginia to define the identity of the state. In other words, "something for everyone" may dilute message focus. That said, Virginia's image as a travel destination is strongly tied to history, which may overshadow other attractive tourism products such as outdoor recreation, wine, music, etc. Virginia has a number of nationally-recognized unique attractions, sites, and destinations, yet many of the state's assets and towns/cities may lack awareness, including differentiation from Washington D.C. in Northern Virginia. In addition, although the "Virginia is for Lovers" brand tagline is well recognized, some confusion among consumers (family friendly vs. romance) related to messaging remains.

Virginia's outdoor elements serve as strengths, but Virginia is somewhat challenged in differentiating its experiences for nature and outdoor recreation from neighboring states with similar offerings, some of which may be well known, competitively marketed, and offered in a concentrated area. This includes other coastal and mountain destinations. Similarly, experiences related to Appalachian culture, motorsports, arts, music, wine, and history are also offered by competitive states. However, Virginia's concentration and recognition of wine experiences as well as its distinctive national history are strong differentiators among its competitors.

With various levels of industry maturity, major tourism anchors throughout the state are also a challenge, and many assets are spread among towns/cities throughout the Commonwealth rather than in concentrated areas. As such, tourism attractions and destination connectivity are important, but they may be limited in some areas. Furthermore, Virginia offers tremendous opportunities for history-related experiences as well as scenic beauty; however, because Virginia is known for these elements, these experiences may be perceived as more passive and not necessarily exciting to potential visitors. For example, cities such as Charleston, South Carolina, which is well known for its history, has also been recognized as one of America's Great Adventure Towns by National Geographic offering eco-tours, surfing, kayaking, horseback riding, and hiking. West Virginia has become well known for its whitewater rafting and has expanded these experiences with other outdoor adventure elements such as zip lines, ropes courses, and other activities.

Competitive Considerations:

- Virginia excels in nationally unique and recognized historical assets
- Wine is a strong differentiator among competition which can be leveraged for other visitor themes
- Strong business base and proximity to Washington, D.C.
- Diversity can be a challenge for defined identity
- Strength of history may overshadow other stand-out elements of the state
- Differentiation of some assets, including coastal and mountain experiences, offered in other states
- Key visitor origin/target markets are also significant competition
- Lack of recognition of some assets and towns, including differentiation from Washington D.C.

Where are you today - Tourism Investment

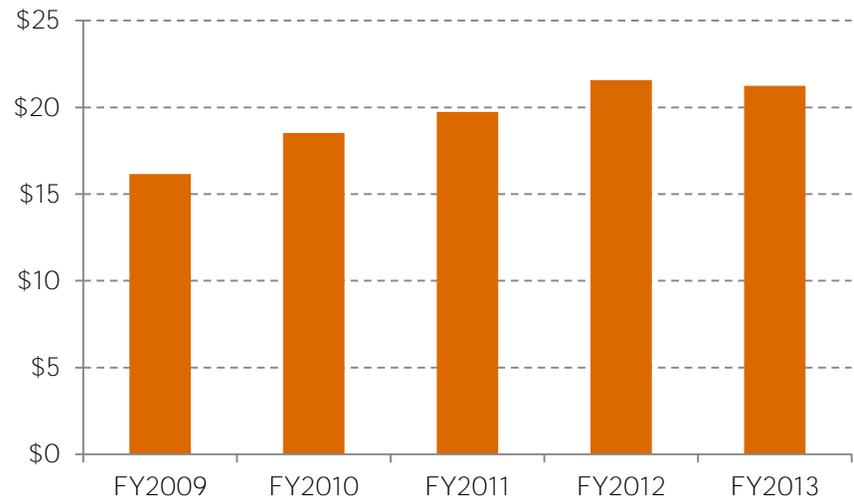
State Funding - Given its substantial economic impact, Virginia has recognized the importance of tourism and has made investments in recent years to support the industry. Governor McDonnell appropriated significant additional investment in tourism and film marketing in 2010. Despite budget increases, tourism marketing funding at the state level needs to be appropriated every year and is not necessarily tied to a dedicated funding source. As such, tourism at the state level, like other departments, is subject to change and political influence.

The Governor signed three bills in 2011, which were intended to help increase tourism and attract new business to the state, including the Tourism Development Financing Program, support for the commercial space port at Wallops Island, and license tax relief for new businesses. In addition, the Governor signed two pieces of legislation to support Virginia craft brewers in 2012. Senate Bill 604 allows retail sales of beer and sampling on the premises of Virginia breweries, allowing brewers to have tasting rooms, similar to wineries. House Bill 359 allows manufacturers to lease space in their brewhouses to smaller-scale brewers, which is intended to reduce some of the significant start-up costs and ultimately allow small-scale breweries to grow.

Product Development - In order to spark tourism development, the Tourism Development Financing Program was created to provide gap financing for localities and developers needing funds for 20 percent or less of the overall development costs. It specifically enables localities that establish and adopt a tourism zone and implement a tourism development plan to work with an economic development authority or political subdivision to enter into a performance agreement which must demonstrate that 80 percent of the financing for the development is in place. The debt service for the gap, or the remaining 20 percent, is financed by a combination of the city, state, and developer. The first project under the program was announced in June 2012.

Research - Virginia has invested in tourism research, which serves as a critical cornerstone for tourism initiatives and provides communities with important information about visitors. The VTC develops visitor profile data showing what type of travelers are visiting Virginia, where they are

VTC Budget (millions)



Investment Key Points:

- Governor's commitment to grow the tourism industry
- State tourism and film funding of \$21.2 million for fiscal 2013
- Tourism Marketing Leverage Funding of \$1.4 leveraged to \$6 million in the marketplace in 2011
- Tourism Development Financing is the newest assistance program
- Local funding limitations and limited dedicated staff
- Desire for greater out-of-state marketing investment

coming from, where they are staying, and what activities they are doing by season, region, and visitor interest. Attitudinal studies also illustrate traveler perceptions and interests, while performance trends are available regarding international visitation, hotels, visitor spending and economic impacts, and others. Communities also continue to invest in research specific to their destinations to remain competitive. Research is an area of on-going importance for Virginia's tourism industry.

Marketing – The Virginia Tourism Corporation's marketing strategy focus is on key, targeted domestic and international markets. Domestic markets include Virginia, Maryland, North Carolina, Pennsylvania, New York, and Ohio. One of the main challenges in domestic marketing is that primary origin markets also serve as key competitors for visitors, and in many cases, they have larger marketing budgets.

Primary international markets include Canada, the United Kingdom, and Germany. Secondary international markets include Belgium, the Netherlands, France, and Latin America, including Mexico and Brazil. China and South Korea are key emerging international markets, and the state has put resources in developing programs in both countries. Virginia participates in a 20-year partnership with Capital Region USA, Inc. (CRUSA). CRUSA is the official regional destination marketing organization promoting Washington D.C., Maryland, and Virginia to overseas visitors. Virginia also partners with the U.S. Travel Association and Brand USA on overseas marketing initiatives.

Tourism stakeholders have expressed the desire for additional out-of-state marketing and international marketing. Survey results of tourism stakeholders, including destination marketing organizations and attractions, also show that a large proportion of marketing efforts (approximately 41 percent for DMOs and 66 percent for attractions) are conducted in-state.

At the local level, funding for tourism marketing is a challenge in many towns across the state, which may have limited funds for advertising as well as operations. For many, tourism marketing is often a function of a department of economic development and/or the chamber of commerce, and may not have full-time staff dedicated to tourism development and promotion. In addition, three-quarters of tourism entities listed on Virginia.org have marketing budgets of less than \$10,000. These funding limitations have contributed to a lack of tourism focus and industry maturity in certain areas of the state. Tourism funding at a local level is recognized as a challenge for some destinations where tourism tax revenue is used for other projects unrelated to tourism due to a lenient interpretation of Virginia's tax code. Others have cited Virginia's Dillon Rule, which requires legislative approval for any increases to county taxes, as a hindrance in the ability to raise additional funds.

Tourism marketing funds are also available through the **Virginia Tourism Corporation's** Marketing Leverage Program, where a minimum of three entities partner to apply for up to \$50,000 in matching funds to invest in a marketing program intended to increase visitor spending. In 2011, \$1.4 million in grant funding was leveraged into approximately \$6 million in the marketplace through this program. Additional marketing funding programs administered by the Virginia Tourism Corporation include the American Civil War Sesquicentennial Leverage Program and the Virginia Tourism and the Arts Grant Program.

At the state level, Virginia has been forward-thinking in terms of tourism marketing. Virginia was the first state to launch a statewide tourism website (in 1995) and is considered an industry leader in social media such as Facebook, Twitter, Instagram, Flickr, and Pinterest and a leader in electronic marketing. The VTC was recently awarded the Mercury Award for the Best State Travel Website by the National Council of State Tourism Directors. After receiving an artistic, structural, and functional redesign in 2011, the site was visited by more than 6.9 million unique visitors.

Education - Virginia has also invested in training and education for entrepreneurs, front-line employees, communities, and tourism professionals. VTC's Partnership Marketing offers tourism planning, marketing, and development assistance for communities and businesses, customer service training, and support for numerous programs for entrepreneurs, agri-tourism business, and tourism businesses. The Virginia Hospitality & Travel Association supports educational opportunities for students as well as food and drink service programs. The Virginia Association of Convention and Visitors Bureaus offers professional development programming for DMO staff. Some local destination marketing organizations are also involved in tourism training programs. Stakeholders continue to recognize the need for additional training to ensure a competent workforce. For example, while Virginia is generally known for friendly residents in tradition with "Southern hospitality," stakeholders have recognized the need for additional tourism customer service training to ensure travelers feel welcome and frontline employees are able to answer questions regarding local tourism assets, and informally promote destinations.

Where are you today -Virginia's Tourism Industry

The Virginia tourism experience is highly complex and is supported by public- and private-sector stakeholders including the VTC, local and regional destination marketing organizations (DMOs), suppliers who provide goods or services to visitors, transportation carriers, travel agents, government organizations, non-profit organizations, and countless secondary businesses that indirectly support the tourism businesses. Industry stakeholders are inherently connected as illustrated in the graphic on the following page, showing a sample of the groups and experiences relevant to Virginia including history, music, arts, wine, outdoor recreation, accommodation, transportation and others. While complex and intertwined, the industry is driven by its tourism assets that visitors want to experience. These assets are supported by the promotions which attract people to destinations, the transportation and accommodation infrastructure which allow visitors to travel to and stay in destinations, and the partnerships and policies which enable preservation, promotion, and development.

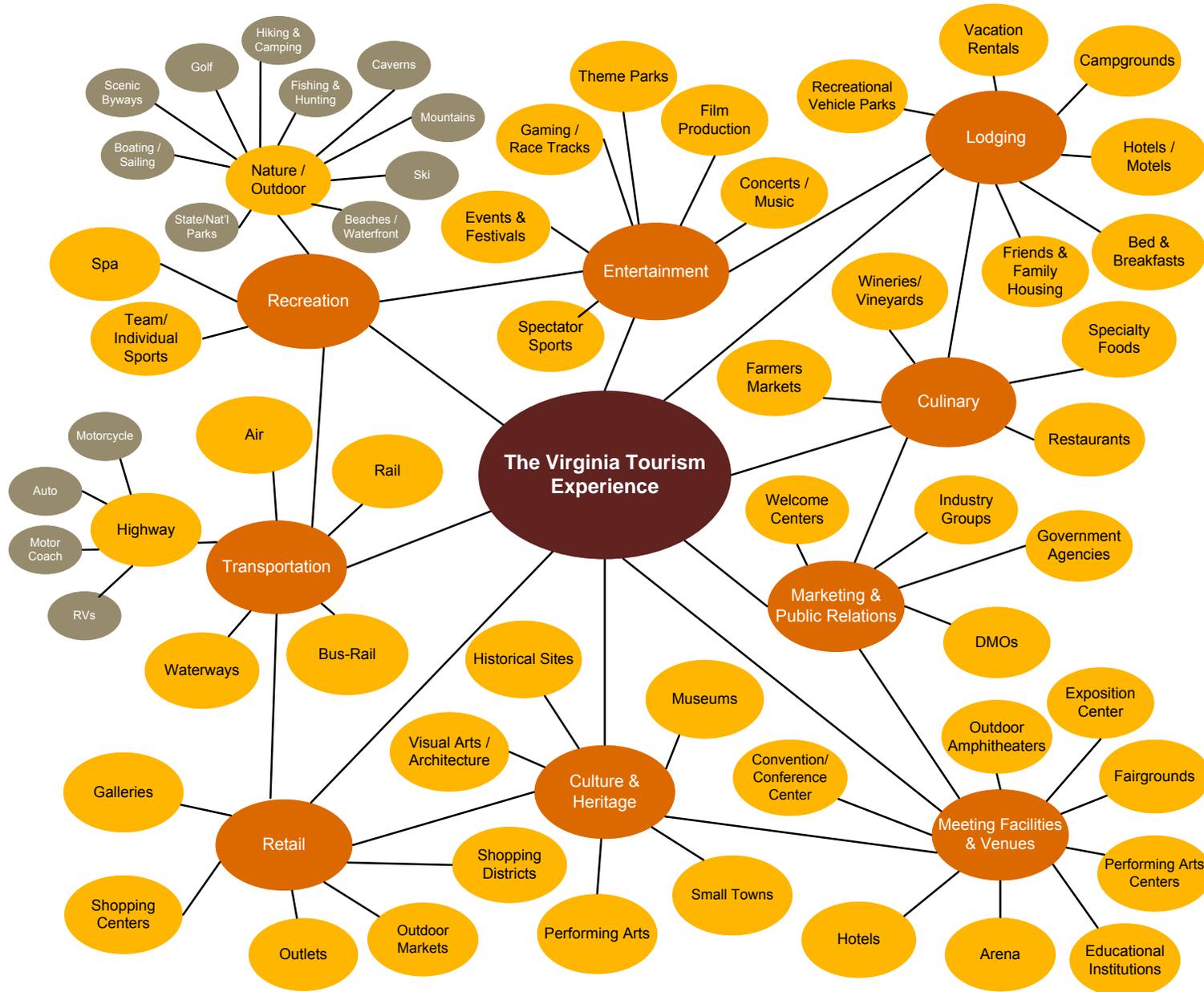
Industry Key Points

- Tourism industry is widespread and intertwined
- New tourism organizations forming
- Limited tourism stakeholder cooperation in some areas of the state
- Limitations in business, government, and resident recognition of tourism value
- Limited cohesive focus on tourism economic development

Local tourism departments and destination marketing organizations continue to develop and grow throughout the state, including city tourism departments as well as regional efforts such as the Coastal Virginia Tourism Alliance and the emerging Southwest Virginia Region. Tourism

collaboration, cooperation, and coordination are generally cited as areas for improvement by stakeholders where a "silo effect" occurs to some extent at a local or state level among organizations directly and indirectly involved in tourism. In addition, normal competition among attractions and destinations is often another limiting factor for industry cooperation.

While most residents have an understanding of the benefit of tourism in terms of quality of life, stakeholders believe there remains a general lack of understanding and acceptance of tourism as an economic development tool among local government leaders, businesses, and residents. The combination of limitations in tourism support, funding, staffing, and cooperation have resulted in a lack of cohesive focus on tourism economic development. The products, supporting infrastructure, partnerships, policies, and promotions needed to enable an environment for tourism economic development and growth in the next five years are addressed in this plan.



Where Do You Want to Be? - The Vision for Virginia Tourism

The following vision for Virginia's tourism industry is based upon input from tourism stakeholders regarding the direction for the Commonwealth in the next five years.

The Vision for Virginia Tourism

Looking ahead over the next five years, **Virginia's tourism industry will** enhance its prominence as a world-class destination, delivering distinctive visitor experiences. Virginia and its diversity will offer superior environments for individual visitors, couples, families, groups, and residents to enjoy nature and outdoor recreation ranging from relaxing getaways to adventure travel across the Commonwealth's coastal shores, beaches, and lowlands to the mountain and valleys along its western borders.

Historical experiences prevalent across the state that highlight the nation's colonial, Civil War, presidential, frontier, Virginia Indians, African American, civil rights, maritime, and military history among others, will serve as enriching tourism draws.

Authentic experiences showcasing Virginia's various music genres, performing, visual and craft arts, community character, culinary richness, wine, and agriculture will be recognized as stand-out elements of the Commonwealth.

Virginia and its destinations will generate incremental economic development through tourism by leveraging rich natural beauty, recreational opportunities, historic and cultural assets, unique attractions, and other existing and new visitor experiences. The successful growth and development of the Virginia tourism industry will be realized while its individual communities are able to maintain their distinctive and valuable socio-cultural attributes, character, and sense of place. Public- and private-sector investment in the various assets within the Commonwealth will be

Virginia's Vision Highlights

- Prominence as a world-class destination enhanced, delivering distinctive visitor experiences
- Generation of incremental economic development by leveraging rich natural beauty, recreational opportunities, historic and cultural assets, unique attractions, and other existing and new visitor experiences
- Growth and development of tourism realized while communities maintain their unique and valuable socio-cultural attributes, character, and sense of place
- Investment in assets to enhance, preserve, and support tourism in a sustainable and environmentally-sensitive manner for visitors and residents
- Emphasis on the visitor experience and focus on creating, promoting, and connecting diverse and authentic experiences in both urban and rural areas that attract increased numbers of visitors and spending across all demographics
- Virginians view tourism as critical to the vitality of the Commonwealth and as an economic engine, while contributing significantly to residents' improved quality of life and providing positive socio-economic impacts

made to enhance, preserve, and support tourism in a sustainable and environmentally-sensitive manner for visitors and residents. Infrastructure will be maintained and improved to enable tourism growth.

Tourism stakeholders will focus on creating, promoting, and connecting diverse and authentic experiences in both urban and rural areas of the Commonwealth that attract increased numbers of visitors and spending across all demographics. Emphasis on the visitor experience will be a central component that contributes to this growth and ensures high levels of return visitation. Virginia will be dynamic and flexible in serving visitors, anticipating their preferences, and efficiently adapting to changes that enable long-term competitiveness.

The tourism industry will be recognized by the Commonwealth's government leaders, private sector, and residents for its significant role as a leading catalyst for and driver of economic development and job creation across all regions of the state. All Virginians will view tourism as critical to the vitality of the Commonwealth and as an economic engine, while contributing significantly to residents' improved quality of life and providing positive socio-economic impacts. The tourism industry will be supported through funding, education, programs, and policies vital to its continued growth. Stakeholders throughout Virginia will work collaboratively to grow tourism in a strategic manner, ensuring partnerships and cooperative efforts that continue to strengthen the Commonwealth's image and success as a tourist destination.

How Do You Get There?

The blueprint for tourism defines how Virginia should achieve this comprehensive vision.

Blueprint Structure

This blueprint for tourism in Virginia is structured in a way which outlines (1) desired outcomes for the tourism industry in the next five years, (2) objectives for achieving those outcomes, and (3) strategies to achieve those objectives. The desired outcomes for Virginia's tourism industry are applicable to all tourism regions of the Commonwealth. Each strategy includes a brief description, list of actions, and potential key critical factors for success of the strategy, as well as the following elements:



- **Priority/timing:** High (immediate) or medium (over the next five years). The categorization of high or medium is both a function of timing and priority for the state. 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.
- **Roles:** Key stakeholders who should be involved in implementing each strategy are identified. It is anticipated that destinations implementing this plan will identify a key leadership role and a group of supporting stakeholders, which will contribute to specific strategy elements. Stakeholders include organizations at the local, state, and national levels of the public and private sectors.

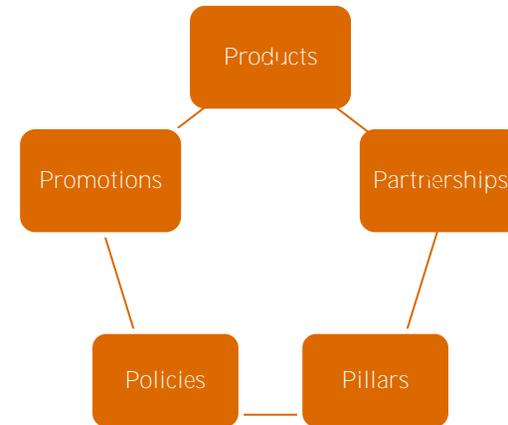
Certain organization names have been coded, including the following: VTC - Virginia Tourism Corporation, DMO - Destination Marketing Organization, PDC - Planning District Commission, VEDP - Virginia Economic Development Partnership, VHHA - Virginia Hospitality & Travel Association, VDOT - Virginia Department of Transportation, DHCD - Virginia Department of Housing and Community Development, DCR - Virginia Department of Conservation and Recreation, DGIF - Virginia Department of Gaming and Inland Fisheries, DEQ - Virginia Department of Environmental Quality, NPS - National Park Service.

- **Potential Measures of Success:** Potential measures to gauge success during the implementation phase where leading organizations will establish metrics. It is anticipated that destinations implementing this plan will establish unique metrics for their respective destinations.

- **Example destinations:** Examples of destinations that implemented similar strategies. For the set of product strategies, each contains an example of a destination in Virginia and elsewhere on a national basis. National examples are also provided for the remaining strategies, associated with supporting elements, partnerships, policies, and promotions, where applicable.

How Do You Get There? - Five Competitive Factors

Virginia's tourism strategy for the next five years centers around five competitive factors for economic development focused on products, pillars (supporting elements), partnerships, promotions, and policies. Products include visitor lures, draws, and attractions. Pillars or supporting elements involve transportation infrastructure, wayfinding, workforce training, and research, which serve to support tourism growth and industry success. Partnerships are characterized by the cooperation, coordination, and collaboration among tourism stakeholders to support tourism development and promotion. Promotions in the context of this plan relate to the strategic elements for tourism promotion, rather than specific advertising tactics. Policies include programs, legislation, and funding which support tourism.



The five factors translate to the following desired outcomes for Virginia's tourism industry:

- **Outcome 1: Products** - Virginia's unique natural, historical, cultural, and public and private assets are leveraged to develop and enhance visitor experiences in an effort to increase economic development through tourism
- **Outcome 2: Pillars (Support Elements)** - The tourism infrastructure of the Commonwealth and supporting elements are improved or developed to enable the success of visitor experiences
- **Outcome 3: Partnerships** - Virginia has strong partnerships among industry stakeholders all working toward authentic experiences with collaboration from governmental, private sector, and industry organizations
- **Outcome 4: Promotions** - Strategic messaging to prospective visitors and industry partners is implemented to increase tourism, economic development, and industry support
- **Outcome 5: Policies** - Policies are created and supported that allow for an integrated approach to the enhancement of visitor experiences, partnerships, and promotions, while improving quality of life and overall economic development

How Do You Get There? – Key Tenets

Three key tenets of Virginia's tourism industry are identified as *Visitor Experience*, *Connectivity*, and *Authenticity*, which provide an underlying basis for achieving the desired product, pillar, partnership, promotion, and policy outcomes.

Virginia's Strategic Tourism Plan Tenets

- **Visitor Experience:** Focus on the complete visitor experience by developing diverse product offerings in an effort to extend traditional visitor seasons. Leverage current strong assets of the Commonwealth, including cities and towns, history, nature and outdoor recreation, music and the arts, culinary, sports, group business, events, industry base, and commercial assets.
- **Connectivity:** Develop clusters of new experiences (attractions) which complement and leverage current assets and enable "hub and spoke" experiences. Enhance experiences to serve as destination anchors and distinctive visitor experiences
- **Authenticity:** Maintain character and personality and create new development in a sustainable manner

How Do You Get There? - Objectives

Each outcome includes a series of objectives which are summarized below.

Outcome 1: Products

Objective 1: **Town/City Centers** - Visitor experiences in town/city centers are improved to create attractive destinations

Objective 2: **Nature & Outdoor Recreation** - Visitor experiences are further developed which highlight Virginia's natural beauty and natural assets

Objective 3: **History & Heritage** - History and heritage experiences are preserved, refreshed, and expanded

Objective 4: **Meetings** - 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

Objective 5: **Sports** - Facilities for participant and spectator sporting events are enhanced and developed

Objective 6: **Culinary** - Culinary visitor experiences (wineries, agri-tourism, dining, etc.) are established and expanded

Objective 7: **Arts & Music** - Visitor experiences related to music and arts (performance, visual, craft, etc.) are created and enriched

Objective 8: **Industry** - Other visitor experiences, which leverage Virginia's economic strengths and specialized industries are enhanced and created

Objective 9: **Commercial Attractions** - Commercial attractions are increased

Objective 10: **Events** - Events which leverage Virginia's tourism assets are created and expanded

Outcome 2: Pillars (Infrastructure)

Objective 1: Strategies to improve transportation are developed and executed

Objective 2: Visitor wayfinding is improved

Objective 3: Tourism education and training programs are continued and enhanced

Objective 4: Tourism research is available which supports tourism development and marketing initiatives

Outcome 3: Partnerships

Objective 1: Organizations to lead tourism initiatives are strengthened or formed

Objective 2: Collaboration among government organizations at the local, state, and federal levels for tourism initiatives is improved

Objective 3: Connectivity among tourism attractions, businesses, and destinations is improved through partnering

Outcome 4: Promotions

Objective 1: Efforts to promote and educate government leaders, the business community, and residents on tourism initiatives and benefits are continued

Objective 2: Tourism promotion efforts for economic development are enhanced

Objective 3: Virginia is positioned based on the lures of tourism assets with a strategy to improve connectivity among destinations, attractions, and visitor themes

Objective 4: Visitor markets with high impact continue to be targeted, while new markets are explored

Outcome 5: Policies

Objective 1: Funding is available for tourism growth

Objective 2: Tourism policies and programs which provide assistance for growth and development are enhanced

Objective 3: Policy for government cooperation is created to assist and support the tourism industry

Objective 4: Policies and programs designed to preserve historical, cultural, and natural assets are maintained

Outcome 1 – Products

Virginia's unique natural, historical, cultural, and public and private assets are leveraged to develop and enhance visitor experiences in an effort to increase economic development through tourism.

Visitor Themes of Product Development

Ten key visitor themes form the basis of the product objectives as follows:

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

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

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

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, collegiate, professional, minor league, and motorsports

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

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

Industry - Refers to products that leverage specific industry areas which Virginia has a base; industries include corporate, military, equestrian, and space

Commercial Attractions - Refers to tourism attractions designed for user entertainment and enjoyment and may not necessarily rely heavily upon inherent destination features. Examples include cruise, higher-end/luxury attractions (golf, spa, resort, and other experiences with upscale elements targeted to an affluent market), family-oriented (theme park), etc.

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.

Product Objectives

The product objectives based on the ten key themes are described below.

Objective 1: ***Town/City Centers*** - Visitor experiences in town/city centers are improved to create attractive destinations

Objective 2: ***Nature & Outdoor Recreation*** - Visitor experiences are further developed which highlight Virginia's natural beauty and natural assets

Objective 3: ***History & Heritage*** - History and heritage experiences are preserved, refreshed, and expanded

Objective 4: ***Meetings*** - 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

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Objective 7: ***Arts & Music*** - Visitor experiences related to music and arts (performance, visual, craft, etc.) are created and enriched

Objective 8: ***Industry*** - Other visitor experiences, which leverage Virginia's economic strengths and specialized industries are enhanced and created

Objective 9: ***Commercial Attractions*** - Commercial attractions are increased

Objective 10: ***Events*** - Events which leverage Virginia's tourism assets are created and expanded

Product Objectives

Objective 1: Visitor experiences in town/city centers are improved to create attractive destinations

Virginia is fortunate to contain city and town centers with unique character and historical charm ranging from urban destinations such as Richmond to smaller communities such as Floyd. A number of towns and cities have invested significantly in their central or downtown areas; however, continued improvement of city and town centers is critical for attracting visitors and new residents, as well as improving the quality of life. Improvements of a town or city center and catalysts should focus on creating unique environments and defining destination identity by building on the history and community character and its residents. Several strategies are presented as steps to enhance town and city centers, some of which are more applicable in certain destinations than others depending on the level of redevelopment and investment that has occurred to date.

In evaluating either individual developments or an overall town or city center plan, it is important to understand that three key requirements are **critical to success. These requirements involve the necessary “mix,” “mass,” and “mesh” for developments to successfully improve or even transform a downtown or main-street district.**

- First, it is important for a diversity of development efforts to occur in combination with each other and in complement to current downtown assets. While they can and do serve as catalysts, no single development, whether it ranges from a major convention center or sports arena to a modest streetscape project should be considered a panacea in creating a vibrant center-city destination. **A diverse “mix” of products (hotels, retail, entertainment, attractions, nightlife, parks, event centers, etc.) is necessary for any catalyst to be successful.**
- **Second, while the precise mix of products is unique to each destination, our research indicates that a critical “mass” (both in number and size) of developments or elements must exist in order to consistently and effectively attract visitors.** This could relate to areas such as the number of hotel rooms necessary to ensure a successful convention center, the number of restaurant establishments needed to create a destination-dining district, or the number of venues and/or clubs needed to create a music district.
- **Finally, individual products should be developed in a way that they “mesh” well with existing and future products.** This could involve building products next to one another (a concept such as building a convention center in a location that is conducive to future hotel development or **creating a continuous “row” of restaurants and outdoor dining experiences**) and/or **ensuring that safe, secure, and convenient transportation linkages (including pedestrian walkability) exists between them.**

Many redevelopment plans fail because all of the essential ingredients (the mix) do not exist at the same time, in sufficient amounts (the critical mass), or they are not sufficiently near each other (the mesh) to enable the promised catalytic or synergistic interaction to occur.

The matrix below is a summary of the strategies and the pages that follow provide a detailed description of each strategy. In regards to the priority/timing, red indicates a high priority and blue indicates a medium priority.

Strategy	Priority/ Timing	Key Stakeholder Roles	Potential Measures of Success	Comparable Case Study
Develop and enhance outdoor experiences in the town or city center	●	Local Govt - Parks & Rec, Local Downtown Development Associations, DHCD, Environmental Organizations, Chambers of Commerce, DMOs, Hospitality Associations, VA Downtown Development Association, VTC, Urban Forest Council, Virginia Tech Community Design Assistance Center, DEQ, Keep Virginia Beautiful, and other community organizations	Number of outdoor improvement initiatives planned and completed Increase in resident and visitor satisfaction	Greenville, South Carolina
Enhance town/city center areas through development of the arts	●	Arts Commission/Council, Local Arts Organizations, Chambers of Commerce, DMOs, Hospitality Associations, VTC, VA Commission for the Arts, Artisan Center of Virginia, Colleges/Universities art programs, VA Downtown Development Association, VA General Assembly	Number of art programs and installations Number of arts facilities planned and completed Number of arts events/festivals Number of new designated arts & cultural districts Increase in resident and visitor satisfaction	Paducah, Kentucky

<p>Establish and uphold guidelines for town/city center enhancement and redevelopment</p>		<p>Local Govt - Planning, Downtown Development Associations, DHCD, Department of Historic Resources, Virginia Tech Community Design Assistance Center, Chambers of Commerce, DMOs, Hospitality Associations, VTC, and other relevant community organizations</p>	<p>Number of development/redevelopment guideline programs established or revised</p> <p>Increase in resident and visitor satisfaction</p>	<p>Franklin, Tennessee</p>
<p>Take steps to align with standards of the Virginia Main Street Program and National Main Street Program</p>		<p>Local Govt - Planning/Eco Development, Downtown Development Associations, DHCD, Chambers of Commerce, DMOs, Hospitality Associations, VTC, and other community organizations</p>	<p>Number of destinations that have progressed on the four elements of the program</p> <p>Number of new Virginia Main Streets</p> <p>Number of Main Street award winners</p>	<p>Libertyville, Illinois</p>
<p>Encourage the development of enterprises that enhance and balance the town/city center's current offerings and increase vibrancy</p>		<p>Local Govt - Planning/Eco Development, Downtown Development Associations, Chambers of Commerce, DMOs, Hospitality Associations, VTC, PDCs, DHCD, VA Downtown Development Association, VA Business Incubation Association, VA Community Development Corporation, VA Dept of Historic Resources, VA Dept of Business Assistance, VEDP, Virginia Chamber</p>	<p>Number of development initiatives for town/city center enhancement</p> <p>Number of new businesses resulting from initiatives</p> <p>Number of tourism zones, enterprise zones, technology zones or other similar districts created</p> <p>Increase in resident and visitor satisfaction</p>	<p>Newark, Delaware</p>
<p>Develop transportation that allows for enhanced connectivity within and to the town/city center</p>		<p>Local Govt - Transportation, VDOT, VA Dept of Rail and Public Transportation, DMOs, Chambers of Commerce, Hospitality Associations, VTC, PDCs, Virginia Chamber</p>	<p>Number transportation plans and relevant studies completed</p> <p>Number of pilot transportation programs initiated</p>	<p>EI Reno, Oklahoma</p>

			Number of transportation programs implemented or expanded	
			Increase in resident and visitor satisfaction	

Products - Towns/City Centers

Strategy 1) Develop and enhance outdoor experiences in the town or city center

Virginia offers tremendous natural beauty and opportunities for outdoor recreation which should be incorporated into city and town centers. Outdoor elements in the town/city center area contributes to destination appeal, visitor experience, and resident quality of life.

Actions:

- Develop and improve outdoor elements such as green spaces, parks, urban trails, water features, river/coast developments, and outdoor cafés, as well as connecting outdoor trails to the town/city center
- Establish or enhance beautification programs, addressing landscapes, streetscapes, waste removal, abandoned buildings, and other related areas
- Incorporate family-friendly and pet-friendly features for both visitor and resident appeal
- Embrace assets of the area where the town or city center serves as a gateway to additional outdoor experiences in the region. Examples could include an outdoor climbing wall, a simulated kayak or rafting experience, incorporation of wildlife, and outfitter visibility in town/city center, outdoor-related events in the town/city center areas, and information and promotional kiosks.

Potential Success Factors:

- Approached holistically to complement other downtown developments with multiple outdoor elements to spur a new direction or revitalization
- Promotion to attract residents to the downtown area and messaging emphasizing quality of life improvements
- Ensuring policies are in place which protect and preserve green spaces and natural assets, yet create programs to encourage development
- Involvement and support from government, businesses, and residents from conceptual planning to on-going maintenance of community assets
- Direct investment by localities and incentive programs to encourage private sector investment and cooperation, leveraging available investment and incentive programs from

Priority/Timing: High

Key Stakeholder Roles: Local Govt - Parks & Rec, Local Downtown Development Associations, DHCD, Environmental Organizations, Chambers of Commerce, DMOs, Hospitality Associations, VA Downtown Development Association, VTC, Urban Forest Council, Virginia Tech Community Design Assistance Center, DEQ, Keep Virginia Beautiful, and other community organizations

Potential Measures of Success:

- Number of outdoor improvement initiatives planned and completed
- Increase in resident and visitor satisfaction

Example Destinations:

- Virginia: Damascus - "Trail Town USA"
- National: Greenville, South Carolina
 - Created Falls Park on the Reedy in 2004 for \$13 million, featuring a 26-acre public garden, bridge, and art
 - RiverPlace was then developed with condos, offices, shops, and minor league ballpark
 - After developments completed, 50 new businesses sprung up downtown
 - ULI Urban Open Space Award Winner

state and national resources on a public and private **basis** such as DHCD, DCR, DEQ, National Trust for Historic Preservation, and other programs

Products - Towns/City Centers

Strategy 2) Enhance town/city center areas through development of the arts

Art has the potential to not only enhance the character, destination appeal, and authenticity of a community, but to also define its brand and recognition through signature visuals that come to represent the destination. Destinations in Virginia including Harrisonburg, Alexandria, Abingdon, Richmond, and Charlottesville have improved their town/city centers through art.

Actions:

- Incorporate art in public spaces where possible (paintings, photography, murals, statues/sculptures, mosaics, and other forms) created by local artists
- Encourage local art to be displayed in businesses such as restaurants, hotels, stores, etc.
- Explore the development of facilities, institutions, and events/festivals to enhance the local arts community in the downtown area, which may include cultural arts venues (visual, performing, etc.), educational programs, creative incubators, and other similar developments
- Continue to form designated arts & cultural districts in town/city centers
- Incorporate art that can serve as iconic branding for destinations and showcase character with themes that may include maritime, equestrian, wine, hiking, etc.
- Use events and festivals to showcase arts (visual, performing, craft, etc.) in the town/city center area

Potential Success Factors:

- Collaboration among local governments, private businesses, and the arts community to create and approve spaces for arts displays
- Promotions of art events, exhibits, and installations to both residents and visitors through various means, including the use of social media

Priority/Timing: High

Key Stakeholder Roles: Arts Commission/Council, Local Arts Organizations, Chambers of Commerce, DMOs, Hospitality Associations, VTC, VA Commission for the Arts, Artisan Center of Virginia, Colleges/Universities art programs, VA Downtown Development Association, VA General Assembly

Potential Measures of Success:

- Number of art programs and installations
- Number of arts facilities planned and completed
- Number of arts events/festivals
- Number of new designated arts & cultural districts
- Increase in resident and visitor satisfaction

Example Destinations:

- Virginia: Luray Arts & Cultural District
- National: Paducah, Kentucky
 - Created a downtown revitalization plan in the early 2000's
 - Implemented an Artist Relocation Program
 - Invested \$2 million which led to the recruitment of over 75 new artists/residents/businesses to the downtown and over \$30 million in private investment
 - Earned multiple national/international awards

-
- Leveraging programs and assistance from the VA Commission for the Arts, Artisan Center of Virginia, and the National Endowment for the arts

Products - Towns/City Centers

Strategy 3) Establish and uphold guidelines for town/city center enhancement and redevelopment

The destination aesthetics of many communities in Virginia have evolved organically throughout history, while other communities have undergone cohesive redevelopment efforts through planning and guidelines. Towns/cities should explore aesthetic guidelines to further define their destination in an authentic manner.

Actions:

- Develop and adhere to guidelines, where appropriate, in an effort to promote aesthetic appeal, preserve historical architecture, and strengthen the character and "sense of place" of the community
- Encompass building facades, height restrictions, business signage, historical markers, and informational/directional signage developed in consideration of other planned improvements for the town/city center areas
- Develop guidelines in a concerted effort to maintain historic character and align with culture and heritage of the area

Potential Success Factors:

- Flexibility to allow for distinctive aesthetics and not be overly restrictive, discouraging development
- Input on guidelines sought from the community, including residents and business owners
- Promotion of benefits to residents and business owners to build support for the downtown guidelines
- Leveraging assistance from Organizations such as the DHCD and Virginia Tech Community Design Assistance Center
- Direct investment required by localities and to the extent possible creation of incentive programs to encourage private sector investment and cooperation

Priority/Timing: Medium

Key Stakeholder Roles: Local Govt - Planning, Downtown Development Associations, DHCD, Department of Historic Resources, Virginia Tech Community Design Assistance Center, Chambers of Commerce, DMOs, Hospitality Associations, VTC, and other relevant community organizations

Potential Measures of Success:

- Number of development/redevelopment guideline programs established or revised
- Increase in resident and visitor satisfaction

Example Destinations:

- Virginia: Staunton
- National: Franklin, Tennessee
 - 15-block historic district, boasts an eclectic mix trendy boutiques, antique shops and restaurants
 - Guidelines for downtown redevelopment were an integral factor in establishing the character and developments
 - Franklin Land Use Plan is the guiding document for the city, setting the vision for the community and giving detailed prescriptions for each section of the city

Products - Towns/City Centers

Strategy 4) Take steps to align with standards of the Virginia Main Street Program and National Main Street Program

Main street programs involve community investment and redevelopment, helping to improve quality of life, community sense of pride, and cooperation, while increasing destination appeal and reinforcing a sense of authenticity. Virginia has 25 nationally recognized main streets, including award winners, such as Staunton, Culpeper, and Abingdon. Steps for additional communities to become recognized main streets or align with tenets of the program should be explored.

Actions:

- Follow the four guiding principles of the program for downtown development (recognizing that not all communities are able to be recognized by the programs):
 - Organization to build partnerships amongst the various groups and stakeholders that have interest in the downtown
 - Promotion of a positive downtown image to build community pride and consumer and investor confidence
 - Design to enhance the physical elements (buildings, signs, parking areas, public art) and image of downtown
 - Economic structure to strengthen the current businesses while also diversifying the downtown businesses

Potential Success Factors:

- Collaboration among community stakeholders, including government leaders, businesses, and other community organizations as required by the program
- Promotion of benefits to residents and business owners to build support for the initiatives and input sought from the community on redevelopment efforts
- Direct investment required by localities and to the extent possible creation of incentive programs to encourage private sector investment and cooperation

Priority/Timing: Medium

Key Stakeholder Roles: Local Govt - Planning/Eco Development, Downtown Development Associations, DHCD, Chambers of Commerce, DMOs, Hospitality Associations, VTC, and other community organizations

Potential Measures of Success:

- Number of destinations that have progressed on the four elements of the program
- Number of new Virginia Main Streets
- Number of Main Street award winners

Example Destinations:

- Virginia: Culpeper, Great American Main Street Award
- National: Libertyville, Illinois
 - Launched Main Street Program in 1982, including a bold system of tax increment financing
 - Restored Victorian character of buildings
 - Formed Downtowners club, produced a downtown guide, and established a loan pool program for renovating buildings within Tax Increment Fund district
 - Between 1986 and 1995, property values climbed 78 percent, up nearly \$21 million, and sales tax revenue increased 77 percent

-
- Leveraging assistance from DHCD, which administers the Virginia Main Street Program

Products - Towns/City Centers

Strategy 5) Encourage the development of enterprises that enhance and balance the town/city center's current offerings and increase vibrancy

The mix of businesses offered by communities is an important element applicable to smaller towns such as South Boston as well as larger metropolitan areas such as Roanoke. This mix contributes to destination appeal, visitor experiences, and resident quality of life. Businesses may include retail, restaurants, nightlife and entertainment, office space, government facilities, museums, cultural centers, and educational institutions.

Actions:

- Evaluate business offerings, which help to maximize the business mix for visitors
- Utilize incentives for targeted business types, which may include the formation of tourism zones, enterprise zones, tax increment financing districts, technology zones, or other similar programs
- Encourage businesses such as unique retail, restaurants, and entertainment to operate during hours conducive to visitor and resident behaviors, including evenings and weekends
- Encourage some retail developments to be connected to the culture and heritage of the area, which reinforces the sense of destination authenticity. These may include antiques, farmers markets, arts and crafts, and others.
- Offer free WiFi in public areas to enhance visitor experiences and quality of life, allowing people to stay downtown longer and utilize outside areas

Potential Success Factors:

- Include a balanced mix of businesses as part of a community's economic development strategy to invest in attracting businesses and increase the economic base
- Education and information availability on economic incentives programs, including enterprise zones, tourism zones, technology zones, tax increment financing districts, etc.
- Local governments encouraged to work closely with the private sector regarding this

Priority/Timing: High

Key Stakeholder Roles: Local Govt - Planning/Eco Development, Downtown Development Associations, Chambers of Commerce, DMOs, Hospitality Associations, VTC, PDCs, DHCD, VA Downtown Development Association, VA Business Incubation Association, VA Community Development Corporation, VA Dept of Historic Resources, VA Dept of Business Assistance, VEDP, Virginia Chamber

Potential Measures of Success:

- Number of development initiatives for town/city center enhancement
- Number of new businesses resulting from initiatives
- Number of tourism zones, enterprise zones, technology zones or other similar districts created
- Increase in resident and visitor satisfaction

Example Destinations:

- Virginia: Stonewall Jackson Hotel and Conference Center, Staunton
- National: Newark, Delaware
 - \$30+ million in private funds invested in new building construction and reconstruction projects and nearly \$1.3 million invested in public improvements downtown, which helped attract more than 25 new businesses

initiative, which may include the formation of public-private partnerships

- Leveraging resources such as the DHCD, VEDP, and VA Department of Business Assistance

Products - Towns/City Centers

Strategy 6) Develop transportation that allows for enhanced connectivity within and to the town/city center

For greater connectivity in a town/city center, transportation options may include rail, light rail, trolleys, shuttle services, and signage. Other personal mobility options may include scooters, Segways, golf carts, bike rentals, etc. The recently developed light rail in downtown Norfolk, as well as Alexandria's King Street Trolley are a couple of examples of connectivity. Greater connectivity within and to the town/city center helps to increase convenience and the overall visitor experience. Additional transportation options increase convenience and destination experience for visitors as well as residents.

Actions:

- Explore the creation of transportation options that connect areas of the town/city center
- Explore the development of transportation options that connect the town/city center with popular visitor attractions, main parking areas, airports, and rail stations outside of the town/city center

Potential Success Factors:

- Involvement of tourism professionals and the business community in transportation planning efforts to help ensure maximum benefits to visitors and residents
- Promotion of new transportation elements to residents as well as visitors to increase awareness, use, and ultimate success of any transportation developments
- Evaluation of the feasibility of development and financing of various transportation options that serve the resident and visitor base unique to each community. Pilot testing of programs should be conducted, as appropriate.
- Leverage available investment and incentive programs from state and national resources

Priority/Timing: Medium

Key Stakeholder Roles: Local Govt - Transportation, VDOT, VA Dept of Rail and Public Transportation, DMOs, Chambers of Commerce, Hospitality Associations, VTC, PDCs, Virginia Chamber

Potential Measures of Success:

- Number transportation plans and relevant studies completed
- Number of pilot transportation programs initiated
- Number of transportation programs implemented or expanded
- Increase in resident and visitor satisfaction

Example Destinations:

- Virginia: Alexandria's Old Town Trolley
- National: El Reno, Oklahoma
 - Revitalized its old trolley, the Heritage Express Trolley, to provide public transportation throughout the downtown and celebrate the town's railroad heritage
 - Used \$1.2 million in Intermodal Surface Transportation Efficiency Act funds and \$200,000 from private and public funders
 - Began operations in 2001, 92 years after the original, to great acclaim
 - Attracts new visitors to El Reno's commercial district

Objective 2: Visitor experiences are further developed which highlight Virginia's natural beauty and natural assets

Virginia offers tremendous natural beauty and opportunities for outdoor experiences for residents and visitors across a variety of terrains from kayaking in the Chesapeake Bay to mountain climbing in Shenandoah National Park. Virginia is fortunate to be home to nationally recognized outdoor experiences, including the Appalachian Trail, Blue Ridge Parkway, and others, and while destinations across Virginia have invested in promoting and developing outdoor experiences for visitors, potential exists for further advancement of the outdoors industry given the Commonwealth's vast and rich natural environment. Enhancing outdoor experiences for visitors should focus on preservation and sustainability of the natural environment while offering visitors access to nature and recreational opportunities and amenities to support their experience. Several strategies are presented as steps to enhance the outdoor experience for visitors, some of which are more applicable in certain areas than others depending upon the type of outdoor experiences available in various destinations and investment in the industry that has occurred to date.

The matrix below is a summary of the strategies and the pages that follow provide a detailed description of each strategy. In regards to the priority/timing, red indicates a high priority.

Strategy	Priority/ Timing	Key Stakeholder Roles	Potential Measures of Success	Comparable Case Study
Develop, maintain, and expand outdoor trails and water trails	●	Govt - Parks & Rec, DMOs, VTC, PDCs, DCR, DGIF, VA Marine Resources Commission, DEQ, VA Dept of Forestry, VDOT, NPS, National Forest Service, National Refuge Service	Number of trails completed which are currently under development Number of plans for new trails and expansions Number of new trails or mileage expansion Increase in trail participation/park attendance Number of events incorporating trails	Hatfield-McCoy Trails, West Virginia
Continue to develop and enhance Outdoor experiences at parks, forests, recreation areas, nature areas, and preserves	●	Govt - Parks & Rec, DMOs, VTC, PDCs, DCR, DGIF, VA Marine Resources Commission, DEQ, VA Dept of Forestry, NPS, National Forest Service, National Refuge Service	Number of new outdoor recreation experiences developed or redevelopment/enhancement projects Number of park/area	Warriors' Path State Park, Tennessee

			<p>classifications by experience type</p> <p>Increase in park/area attendance</p> <p>Increase in visitor satisfaction</p>	
Leverage Virginia's waterfront areas	●	Local Govt - Dept depends on use (Parks & Rec, Planning, Economic Development, etc.), DMOs, VTC, Hospitality Associations, PDCs, DCR, DGIF, VA Marine Resources Commission, VEDP, VDOT, VA Dept of Business Assistance, NPS, National Refuge Service	<p>Number of waterfront developments planned and completed, including commercial and eco-friendly developments</p> <p>Number of water access improvements</p> <p>Increase in park/area attendance</p> <p>Increase in resident and visitor satisfaction</p>	Governors Island, New York
Seek and maintain designations for National Scenic Byways and the Virginia Scenic Byways and Scenic Drives	●	Govt - Parks & Rec, VDOT, DMOs, VTC, DCR, DGIF, VA Dept of Forestry, NPS, National Forest Service, National Refuge Service	<p>Number of byway and scenic drive applications submitted</p> <p>Number of new designations</p> <p>Number of improvements to existing drives and byways</p>	Pacific Coast Highway, California
Develop and enhance accommodations related to outdoor experiences	●	Local Govt Planning/Eco Development, DMOs, Lodging Developers, VTC, Hospitality Associations, VA Dept of Business Assistance, VEDP, Virginia Tech Community Design Assistance Center, Virginia Green, and other community organizations	Number of accommodations studied, planned, and developed	The Lodge at Sun Ranch, Montana

Products - Nature & Outdoor Recreation

Strategy 1) Develop, maintain, and expand outdoor trails and water trails

Trails have the opportunity to create and define visitor experiences, connect destinations and attractions, and promote visitor themes. Virginia not only contains the longest section of the world-renowned Appalachian Trail, but also has numerous trails and water trails providing a variety of outdoor activities. Notable trails include the Virginia Birding and Wildlife Trails, Bike 76 Trail, Virginia Creeper Trail, and others as well as water trails such as the Captain John Smith Trail, Upper James Water Trail, and Mathews Maritime Heritage Trail.

Actions:

- Continue to develop trails related to hiking, biking, equestrian, birding, ATV, and watercraft (e.g. sailboats, kayaks, motorized boats, and rafts) to enhance outdoor experiences and connect attractions and destinations
- Complete trails under development such as the Virginia Capital Trail and Spearhead Trails
- Ensure accessibility to water and access to navigation information through mobile devices (apps, websites), signage, and maps
- Explore visitor amenities such as outfitters and guides, guides on call, trail "rest areas" and shade areas, as well as accommodations and other attractions near trails
- Explore distinctive trails that connect regions and areas outside the state, have specific themes, tie in other visitor themes (history, music, culinary, etc.), and seek designations such as National Recreation Trails
- Utilize events and festivals to enhance trail recognition and points of interest along trails
- Incorporate motorized access (cars, smart cars, golf carts, handicapped access or group access, etc.) with the recreation trails in a minimally invasive manner, as appropriate
- Include geo-caching activities along trails
- Explore the development of shuttle services to allow for one-way trail activity

Potential Success Factors:

- Collaboration between numerous local, state, and national entities

Priority/Timing: High

Key Stakeholder Roles: Govt - Parks & Rec, DMOs, VTC, PDCs, DCR, DGIF, VA Marine Resources Commission, DEQ, VA Dept of Forestry, VDOT, NPS, National Forest Service, National Refuge Service

Potential Measures of Success:

- Number of trails completed which are currently under development
- Number of plans for new trails and expansions
- Number of new trails or mileage expansion
- Increase in trail participation/park attendance
- Number of events incorporating trails

Example Destinations:

- Virginia: Damascus - "Trail Town USA"
- National: Hatfield-McCoy Trails, West Virginia
 - Off-highway vehicle trail system consisting of seven trails with over 600 total miles
 - Trails are opened to ATVs, dirt bikes, and utility vehicles (UTVs) and have at least one trail head with parking and restrooms and many trails offer connective trails to ATV-friendly towns
 - The trails also host events throughout the year, such as National Trailfest
 - The trails provided a financial boost for southern WV and received national recognition

-
- Promotion of trails under development to residents to garner support and inform potential visitors of coming attractions
 - Public investment for trail development and incentive programs to encourage private sector investment in visitor amenities to support trail visitors
 - Leveraging programs such as the VA Recreational Trails Fund and National Trails Fund

Products - Nature & Outdoor Recreation

Strategy 2) Continue to develop and enhance outdoor experiences at parks, forests, recreation areas, nature areas, and preserves

With 35 state parks, 48 nationally designated parks, forests, recreation areas, and hundreds of local and regional parks, Virginia has a broad range of options for visitors to experience nature and engage in outdoor activities. Activities may include walking/hiking, biking, swimming, equestrian, camping, picnicking, boating, rafting, paddling, fishing, hunting and others. Ensuring accessible, distinctive, and enjoyable outdoor offerings increases the visitor experience.

Actions:

- Continue to develop distinctive experiences for visitors and residents to enjoy nature, observe wildlife, and engage in recreational and educational activities for various types of visitors from outdoor enthusiasts to **“soft” recreation suitable for families and more** relaxing outdoor activities and fully leverage the diverse landscapes from the mountains to beaches for these experiences
- Explore the development/expansion of new amenities on site or nearby such as additional park activities, accommodations (camping, lodges, cabins, etc.), outfitter and guide services, food/concessions, group facilities, and education facilities. These amenities should accommodate group business and larger travel parties, including the parking infrastructure for tour buses, RVs, large vehicles, etc.
- Consider designating certain parks/areas as "Adventure" parks, in addition to activities offered for families and for relaxing nature experiences. Adventure park elements should be enhanced and developed to include elements such as rafting, zip lines, mountain biking, ATVing, high ropes courses, mountain climbing, hang gliding/paragliding, canyoning, etc., and other adventure activities that are typical for more extreme outdoor activities. In addition, other parks/areas could be positioned as "city breaks", relaxing getaways, or family adventures which offer nature, educational, and recreational experiences that are geared towards all types of visitors and experience levels and have a greater focus of

Priority/Timing: High

Key Stakeholder Roles: Govt - Parks & Rec, DMOs, VTC, PDCs, DCR, DGIF, VA Marine Resources Commission, DEQ, VA Dept of Forestry, NPS, National Forest Service, National Refuge Service

Potential Measures of Success:

- Number of new outdoor recreation experiences developed or redevelopment/enhancement projects
- Number of park/area classifications by experience type
- Increase in park/area attendance
- Increase in visitor satisfaction

Example Destinations:

- Virginia: Breaks Interstate Park
- National: Warriors' Path State Park, Tennessee
 - 950-acre park known for its modern-day outdoor activities
 - In 2007, the park added Darrell's Dream playground. The \$3 million facility intended for children has a sand area, puzzles, climbing poles, puppet theatre area, pipe bells, Anderson Treehouse, Palmer Center Foundation Amphitheater, and Lions Narnia Braille Trail, which has eight sensory stations along a quarter-mile, wheelchair-accessible trail that narrates the story of Aslan from the Chronicles of Narnia to visitors.

walking trails, wildlife, canoeing, boating, camping, star-gazing, and other similar activities.

- Continue preservation, maintenance, and cleanliness of natural resources
- Ensure accessibility to recreational experiences, including infrastructure (informational and directional signage) maintenance for trails, and water access points
- Leverage the recognition of national parks, forests, and recreational areas, which are often most familiar and visible to out-of-state and international visitors. Park/area information should also be easily accessed through mobile devices for navigation and information about the park/area and destination offerings.
- Include park and recreation area elements that are kid-friendly, including distinctive play areas and smaller-scale adventures, as well as pet-friendly and horse-friendly elements
- Incorporate seasonal activities in park and recreation areas, which may include winter activities such as tubing, tobogganing, etc.
- Continue to utilize park areas for events and festivals

Potential Success Factors:

- Outdoor recreation opportunities should be enhanced and developed in a collaborative manner among government, businesses, community organizations, and residents, which may occur at a local, state, and national level
- Improvements or developments related to recreational attractions should be promoted to residents as well as visitors
- Policies should be maintained and developed which protect and preserve natural areas, yet allow for recreational use in a sustainable manner
- Direct investment will be required by the public sector for improvements and developments, and incentives for private sector investment in visitor amenities to support recreational assets should be explored

Products - Nature & Outdoor Recreation

Strategy 3) Leverage Virginia's waterfront areas

Virginia has vast miles of waterfront along its rivers, lakes, beaches, and coastlines where visitor opportunities for recreation and enjoyment in both natural and developed settings can be maximized. Virginia utilizes much of its waterfront areas in strategic locations for visitors and residents to enjoy nature and outdoor recreation from Tides Inn resort in Irvington to Buggs Island Lake in Southern Virginia to the James River Park in Richmond. However, access to waterfront areas has been recognized as a challenge in certain areas, such as the Chesapeake Bay region or limited beach access in the Eastern Shore. Further sustainability and balance of these natural attractions with development will be critical elements for tourism growth.

Actions:

- Enhance and expand elements which enable and support water accessibility and recreation activities such as fishing, boating (including sailing and yachting), rafting, paddle sports (kayaking, canoeing, paddle boarding, etc.), tubing, hiking/biking activities along the shorelines, and others. Experiences are encouraged to be positioned as both eco-friendly and family-friendly. Accessibility features include boat ramps/slips, marinas, rentals/charters, guides/ tours, and parking. Outfitter businesses near water access points should also be encouraged and expanded in strategic locations to support waterfront activities. Infrastructure, including roads and signage directing visitors to water access points should also be improved.
- Create and enhance waterfront attractions for visitors and residents that are minimally invasive for the environment. Accommodations, dining/concessions, retail, and entertainment, such as event facilities, waterfront music, arts, and wine opportunities should be developed in strategic locations in proximity to coastline areas. New development or redevelopment should leverage the current aesthetic and character of the destination. For accommodations, coastlines present a key opportunity for resort development with on-site access to natural resources and recreation opportunities.

Priority/Timing: High

Key Stakeholder Roles: Local Govt - Dept depends on use (Parks & Rec, Planning, Economic Development, etc.), DMOs, VTC, Hospitality Associations, PDCs, DCR, DGIF, VA Marine Resources Commission, VEDP, VDOT, VA Dept of Business Assistance, NPS, National Refuge Service

Potential Measures of Success:

- Number of waterfront developments planned and completed, including commercial and eco-friendly developments
- Number of water access improvements
- Increase in park/area attendance
- Increase in resident and visitor satisfaction

Example Destinations:

- Virginia: Norfolk
- National: Governors Island, New York
 - 172-acre island located approximated one-half mile from the southern tip of Manhattan and is accessible via a complimentary ferry only
 - The island hosts cultural events, food festivals, concerts, performances, and offers activities such as a bicycle path, an artistic mini golf course, and plenty of fields for activities
 - Today, the island attracts thousands of visitors each day and has become known as New York City's "Playground for the Arts"

Distinctive resort options should be explored, including luxury spa resorts, vacation rentals, cabins or cottages, outdoor retreats, floating accommodations, and other options.

- Maintain and develop parks, trails (water and land), piers, and boardwalk areas along coastal destinations equipped with points of interest, activity points, and educational information (nature, history, etc.). Themed trails that further enhance the visitor experience and connectivity should also be explored.
- Explore developing or expanding designated areas and preserves for fishing and hunting (both public and private), creating concentrated attraction areas and lending potential to further support amenity development. The licensing process for out-of-state visitors should continue to be convenient and efficient with licenses available from commercial locations and online.
- Further develop and promote rivers with rapids as white water rafting and kayaking locations. Outfitters, guides, river access points, parking, and other infrastructure (concessions, first aid, restrooms, etc.) should be developed in strategic locations to improve the rafting or kayaking experience. Outfitters and/or guides should offer transportation services for individuals or groups. Other visitor activities and supporting elements should also be available around access points.
- Continue preservation, maintenance, and cleanliness of natural resources to ensure ongoing use and appeal

Potential Success Factors:

- Approach waterfront development opportunities in a holistic manner for development that leverages the natural area, complements other destination attractions, and is respectful of the environment
- Cooperation among government entities, private businesses, and environmental organizations
- Maintain and develop policies which protect and preserve natural areas, yet allow for recreational use in a sustainable manner
- Investment may be led by the private or public sector, yet exploration of incentives for private sector investment in waterfront developments and businesses which serve as visitor amenities near the waterfront should be explored
- Leveraging potential resources for development assistance such as the Land and Water Conservation Fund and the Community Development Block Grants

Products - Nature & Outdoor Recreation

Strategy 4) Seek and maintain designations for National Scenic Byways and the Virginia Scenic Byways and Scenic Drives

Through byways and scenic drives, Virginia is able to showcase its natural beauty throughout the year, including areas for prime foliage viewing and areas near coastlines as well as roads serving as connections among destinations and attractions. They are visitor experiences themselves and help to connect destinations and attractions. Virginia is nationally recognized for the Blue Ridge Parkway and other byways such as Skyline Drive and Colonial Parkway that leverage natural beauty and historic environment. Virginia's Back of the Dragon Trails is also an example of a scenic driving experience positioned for motorcycles.

Actions:

- Engage in planning process for byway and scenic drive designations with stakeholders on a collaborative basis and on a strategic basis to complement other tourism attractions
- Ensure signage, including directional signage and informational signage promoting nearby attractions/destinations and key milestones, is clear and easily visible
- Evaluate driving experiences to ensure accessibility, availability of picturesque stop-off points, and proximity to lodging and visitor amenities
- Ensure information on the drives and the opportunity to see Virginia's natural beauty is readily available, including mobile devices

Potential Success Factors:

- Collaboration of government, DMOs, and transportation authorities
- Leverage assistance from the VDOT, DCR, and the America's Byways program related to designations
- Marketing support for newly designated roads and byways, where additional promotion is needed beyond the state or national listing
- Ongoing maintenance and investment to maintain cleanliness, landscaping, and road

Priority/Timing: High

Key Stakeholder Roles: Govt - Parks & Rec, VDOT, DMOs, VTC, DCR, DGIF, VA Dept of Forestry, NPS, National Forest Service, National Refuge Service

Potential Measures of Success:

- Number of byway and scenic drive applications submitted
- Number of new designations
- Number of improvements to existing drives and byways

Example Destinations:

- Virginia: Skyline Drive
- National: Pacific Coast Highway, California
 - Runs along the coast of California and includes two portions that are designated as National Scenic Byways: the Big Sur Coast Highway and the San Luis Obispo North Coast Byway
 - Big Sur offers picturesque views to travelers of the Pacific Coast Highway as well as an opportunity for travelers to exit the scenic byway and participate in outdoor activities
 - Visitors at San Luis Obispo North Coast Byway can enjoy outdoor activities such as kayaking, fishing, and swimming at William R. Hearst Memorial State Beach

upkeep to deliver on visitor expectations

Products - Nature & Outdoor Recreation

Strategy 5) Develop and enhance accommodations related to outdoor experiences

With the vast outdoors, Virginia offers a number of accommodations geared toward outdoor experiences, including cabins, camping, lodges, and nature-oriented resorts, including those such as Primland, the Homestead, Massanutten, and Mountain Lake Hotel to name a few. Additional accommodations to enhance nature-oriented experiences for visitors should be explored.

Actions:

- Evaluate the development of additional accommodations in a concentrated manner such as cabins, lodges, and cottages designed for outdoor experiences in strategic locations. Explore lodge options and suite accommodations which may be attractive for group business and larger travel groups such as multi-generational travelers.
- Explore the development of eco-oriented resorts and accommodations intended to embrace and highlight Virginia's beauty and natural assets and offer visitors distinctive experiences
- Study the expansion or development of winter-oriented resorts. The Homestead, Massanutten, Wintergreen, and Bryce also offer year-round outdoor experiences with skiing, snowboarding, snowshoeing, snowmobiling, and tubing. Virginia's climate and geography allow for winter activities, but in a much more limited fashion than more northern locations on the east coast. This, along with inherent weather volatility, call for the need to study these types of offerings.
- Consider the development of higher-end as well as rustic accommodations
- Incorporate lodging and outfitter partnerships with outfitter access from accommodations

Priority/Timing: High

Key Stakeholder Roles: Local Govt Planning/Eco Development, DMOs, Lodging Developers, VTC, Hospitality Associations, VA Dept of Business Assistance, VEDP, Virginia Tech Community Design Assistance Center, Virginia Green, and other community organizations

Potential Measures of Success:

- Number of accommodations studied, planned, and developed

Example Destinations:

- Virginia: Primland
- National: The Lodge at Sun Ranch, Montana
 - An eco-oriented dude ranch located on 26,000 acres in Cameron, Montana known for its green initiatives
 - The six rooms and two private cabins at the lodge are all constructed from pre-existing structures and recycled building materials by local contractors and the gourmet cuisine is organic and free-range
 - Each room has scenic views of the mountains and of the local wildlife
 - While at the resort, visitors can participate in outdoor recreation activities such as horseback riding, paddling, fly fishing, and hiking

Potential Success Factors:

- Investment for the development or enhancement of accommodations related to outdoor experiences may be led by the public or private sector and exploration of incentives for business developments or expansions
- Consideration of public/private partnerships to ensure development
- Evaluation and potential amendment for ordinances/ policies which may limit accommodation development

Objective 3: History and heritage experiences are preserved, refreshed, and expanded

Virginia’s history is the nation’s history and a truly distinctive element for the Commonwealth. Virginia is well known for its history and its related attractions, including colonial, presidential, Civil War, Virginia Indian, civil rights, African American, music, coal, tobacco, military, maritime/watermen, frontier, Appalachian culture, and other history and cultural heritage, which continue to be important for visitors. As the tourism industry continues to develop and mature, it will be critical for historic and heritage assets to be preserved while visitor experiences continue to be high quality, enriching, and relevant for consumers. Several strategies are presented as steps to enhance the history and heritage experience, some of which are more applicable in certain areas than others depending upon the type of history and heritage inherent to various areas.

The matrix below is a summary of the strategies and the pages that follow provide a detailed description of each strategy. In regards to the priority/timing, red indicates a high priority.

Strategy	Priority/ Timing	Key Stakeholder Roles	Potential Measures of Success	Comparable Case Study
Refresh history and heritage visitor experiences	●	Local Govt- Planning/Eco Development, Attraction Management, DMOs, History Foundations/Non-Profit Organizations, VTC, Preservation Virginia, Virginia Historical Society, VA Dept of Historic Resources	Number of improvements to historical experiences (programming, technology, exhibits, kid-friendly elements, etc.) Number of new history/heritage experiences planned and developed Number of events with history/heritage elements	National Civil Rights Museum, Memphis, Tennessee
Invest in historic structures, sites, and attractions	●	Preservation organizations, Local Govt, DMOs, History Foundations/Non-Profit Organizations, VTC, Preservation Virginia, Virginia Historical Society, VA Dept of Historic Resources, National Trust for Historic Preservation, NPS	Number of historic preservation/rehabilitation projects Number of historic re-use/expansion developments Number of recognized preservation efforts Number of new historic	American Brewery Building, East Baltimore, Maryland

			designations/registered places	
Continue to connect history experiences	●	DMOs, Local Govt, VTC, Attraction Management, History Foundations/Non-Profit Organizations, Virginia Preservation, Virginia Historical Society, VA Dept of Historic Resources, National Trust for Historic Preservation, NPS, DCR, PDCs, VDOT	<p>Number of new history/heritage trails or expansions</p> <p>Number of history/heritage trails connected with other visitor themes</p> <p>Number of history/heritage itineraries</p> <p>Number of history/heritage packages</p> <p>Number of history/heritage events connected with trails</p>	Freedom Trail, Boston
Enhance historical experiences through accommodations	●	Local Govt - Planning/Eco Development, DMOs, Lodging Developers, History Foundations/Non-Profit Organizations, Preservation Virginia, Virginia Historical Society, VA Dept of Historic Resources, and other relevant community organizations	<p>Number of accommodations planned and developed</p> <p>Number of historic hotel designations</p> <p>Number of historic preservation, rehabilitation, or re-use projects for accommodations</p>	The Gettysburg Hotel, Gettysburg, Pennsylvania

Products - History & Heritage

Strategy 1) Refresh history and heritage visitor experiences

With the abundance of history and heritage opportunities across the state, it is important **that these visitor experiences continue to be interesting and don't become stale.** This is a challenge not only for Virginia, but for historical sites and destinations across the globe as the changing visitor demographic, today's high-paced environment, and technology are impacting visitor demands and preferences. Not only must the history and heritage stories be compelling and authentic, but aspects of the visitor experience such as scheduled tours, passive exhibits, limited hours, etc. may detract from the appeal to modern visitors.

Actions:

- Refresh history and heritage experience through innovative ways to tell historic stories and position experiences that are attractive for various visitor groups, including Millennial, family, international, and multi-cultural/ethnic travelers
- Increase use of technology (listening devices, iPads, touch screens), interactive/hands-on experiences, self-guided tours, and offer various means of experiencing the attractions while ensuring authenticity
- Create kid-friendly amenities and activities on **site, such as children's designated activity** areas, hands-on exhibits, outdoor areas, animals, merchandise, water features, etc.
- Ensure that historic stories continue to relate to emerging traveler segments and new stories and perspectives continue to be told. Explore niche history areas such as ghost tourism at haunted places (which Virginia ranks high on the list of national registered haunted places), alcohol history, motorsports, etc. to convey history in a new way.
- Incorporate geo-caching and scavenger hunt activities at historic sites and attractions
- Continue to highlight heritage with visitor themes such as culinary (oysters, Brunswick stew, etc.), arts (Heartwood and Round the Mountain trails), music (Crooked Road), and other visitor themes through attractions and events
- Continue to promote history and heritage through events and festivals, including celebration of cultural heritage and traditions as well as commemorations of historic figures and dates. Event opportunities throughout the year may include times such as

Priority/Timing: High

Key Stakeholder Roles: Local Govt- Planning/Eco Development, Attraction Management, DMOs, History Foundations/Non-Profit Organizations, VTC, Preservation Virginia, Virginia Historical Society, VA Dept of Historic Resources

Potential Measures of Success:

- Number of improvements to historical experiences (programming, technology, exhibits, kid-friendly elements, etc.)
- Number of new history/heritage experiences planned and developed
- Number of events with history/heritage elements

Example Destinations:

- Virginia: Ralph Stanley Museum
- National: National Civil Rights Museum, Memphis
 - Undergoing \$27 million renovation designed to accommodate how younger visitors process information, replacing original text-heavy exhibits with more immersive environments, interactive technology, archival film, and artifacts
 - New exhibits to "show" rather than "tell" story of civil rights, including Brown vs. Board of Education courtroom, new theatre for "From the Mountaintop" speech, and others

Presidents Day, Veterans Day, and Black History month, among others.

- Ensure accessibility for group business at historical sites, including parking infrastructure for tour buses

Potential Success Factors:

- Investment in history-related visitor experiences to ensure continued growth. Incentives should be explored and policies/programs should enable historical attraction improvements while maintaining authenticity and character.
- Cooperation between attraction management and other community stakeholders, including government entities, historical organizations, destination marketing organizations, and others are encouraged to create distinctive experiences for visitors
- Promotion of historical enhancements to inform potential visitors of improvements to the visitor experience
- Leveraging resources for assistance which may include Preservation Virginia, Virginia Historical Society, Virginia Department of Historic Resources, the National Trust for Historic Preservation, and others

Products - History & Heritage

Strategy 2) Invest in historic structures, sites, and attractions

Preservation is critical to ensuring that visitors can continue to experience rich national and Virginia history. Over \$1.5 billion has been invested in certified rehabilitation projects in over 1,200 historic buildings in the last ten years, and this type of preservation should **continue to ensure Virginia's authenticity is maintained.**

Actions:

- Continue to invest in historical structures and attractions and ensure sustainability
- Enhance visitor experiences with preservation in mind and ensure enjoyable and accessible visitor experiences. Continue to explore opportunities for reuse of historic assets and **structures for tourism purposes such as wine tasting rooms, B&B's, art venues, boutique hotels, and other attractions.**
- Explore investment in history and heritage attractions to further accommodate groups and large travel parties, such as on-site group facilities and parking infrastructure appropriate for buses, RVs, large vehicles, etc.
- Heritage should continue to be maintained, enriched, and promoted through events, arts, music, architecture, culinary, natural landscapes, historical attractions, and others means
- Seek recognition for preservation efforts such as those awarded through Preservation Virginia and National Trust for Historic Preservation, which not only helps to preserve the asset itself, but also to promote history
- Explore designations for National Historic Sites, National Heritage Areas, National Landmarks, etc. to aid in preservation efforts for historical, cultural, and natural assets and promotion of history and heritage experiences. Heritage designations in Virginia include the Journey Through Hallowed Ground multi-state area and the Shenandoah Battlefields area. The Northern Neck area is currently seeking a designation as is Southwest Virginia for Crooked Road.

Priority/Timing: High

Key Stakeholder Roles: Preservation organizations, Local Govt, DMOs, History Foundations/Non-Profit Organizations, VTC, Preservation Virginia, Virginia Historical Society, VA Dept of Historic Resources, National Trust for Historic Preservation, NPS

Potential Measures of Success:

- Number of historic preservation/rehabilitation projects
- Number of historic re-use/expansion developments
- Number of recognized preservation efforts
- Number of new historic designations/registered places

Example Destinations:

- Virginia: The Fort A.P. Hill - Camden Innovative Preservation Project
- National: American Brewery building, East Baltimore
 - Restoration of the 1887 Gothic building retained the key historical elements of the original brewery
 - Serves as Humanim office headquarters, and since moving in 2009, it has been inundated by requests for tours and rental space
 - Economic development catalyst for its troubled urban neighborhood
 - Public-private project for \$25 million
 - Awarded the National Preservation Award in 2011

Potential Success Factors:

- Policies and programs of the Virginia Department of Historic Resources and Preservation Virginia which provide tax credits and funding for historic preservation should be continued. These organizations, along with the Virginia Historical Society, may be leveraged as resources.
- Promotion of importance of preservation efforts to residents and government leaders
- Collaboration among government, tourism, and historical organizations

Products - History & Heritage

Strategy 3) Continue to connect history experiences

Opportunities to connect history and heritage experiences through trails, itineraries, and packages should continue in an effort to enhance visitor experiences, while connecting destinations and attractions. The Civil War Trails, Journey Through Hallowed Ground, Presidential Trail of Virginia, Overmountain Victory National Historic Trail, Wilderness Road Trail, and Captain John Smith Trail are just a few examples of trails in Virginia helping to connect historic sites, heritage experiences, attractions, and areas.

Actions:

- Use trails, itineraries, and packaging to connect historical sites, attractions, events, and destinations. These should connect various historical themes and connect history with other visitor themes, such as arts, music, wine, and the outdoors. This also includes heritage experiences personified through these themes.
- Utilize events and festivals to enhance trail recognition and points of interest along trails
- New or existing trails should be distinctively defined through the heritage experience offered to the visitor. Connection may also be enhanced through the designation of National Heritage Areas (as also noted in Strategy 2).

Potential Success Factors:

- Collaborative planning among tourism stakeholders and cooperation among attractions and destinations
- Promotions necessary to support trails and packages. Promotions and information visibility should be easily accessible and navigated with information readily available through mobile devices, signage, and maps.
- Distinct paths for themed trails and signage along trails, which denotes trail stop and name of attraction

Priority/Timing: High

Key Stakeholder Roles: DMOs, Local Govt, VTC, Attraction Management, History Foundations/Non-Profit Organizations, Virginia Preservation, Virginia Historical Society, VA Dept of Historic Resources, National Trust for Historic Preservation, NPS, DCR, PDCs, VDOT

Potential Measures of Success:

- Number of new history/heritage trails or expansions
- Number of history/heritage trails connected with other visitor themes
- Number of history/heritage itineraries
- Number of history/heritage packages
- Number of history/heritage events connected with trails

Example Destinations:

- Virginia: The Historic Triangle
- National: Freedom Trail, Boston
 - The urban walking trail connects 16 sites which includes historic buildings and locations that include events of the early settlement of Boston, American Revolution, the War of 1812, the Civil War, and various cultural civil events such as the abolitionist movement and the literary enlightenment of the 1800's
 - The trail attracts more than 3.2 million people per year, contributes economic value, and is an

Products - History & Heritage

Strategy 4) Enhance historical experiences through accommodations

With Virginia's rich history, Virginia is in the position to further provide and promote history through accommodations such as through the Stonewall Jackson Hotel, Jefferson Hotel, Williamsburg Inn, Berry Hill Resort, and others. Opportunities to enhance historical themes through unique lodging accommodations should continue to be explored.

Actions:

- Use historic structures, hotels designed in connection with historical aesthetic, and hotels **designated as “Historical Hotels” by the National Trust for Historic Preservation** to reinforce historical experiences
- Seek new designations as "Historic Hotels"
- Continue to utilize historic homes for bed & breakfasts
- Use historic hotels for history/heritage events and festivals, including commemoration locations

Potential Success Factors:

- Investment for the development or enhancement of accommodations related to historical experiences led by the public sector or the private sector and exploration of incentives for business developments or expansions
- Exploration of public/private partnerships to ensure development
- Evaluation and amendment of ordinances or policies which may limit accommodation development, as needed, to ensure accommodation demand is fulfilled
- Promotions to key visitor segments similarly to other accommodations

Priority/Timing: Medium

Key Stakeholder Roles: Local Govt - Planning/Eco Development, DMOs, Lodging Developers, History Foundations/Non-Profit Organizations, Preservation Virginia, Virginia Historical Society, VA Dept of Historic Resources, and other relevant community organizations

Potential Measures of Success:

- Number of accommodations planned and developed
- Number of historic hotel designations
- Number of historic preservation, rehabilitation, or re-use projects for accommodations

Example Destinations:

- Virginia: The Craddock Terry Hotel in Lynchburg
- National: The Gettysburg Hotel
 - Originally opened in 1797 steps away from the Battle of Gettysburg and President Lincoln's Gettysburg Address
 - Closed in 1964, the hotel was reopened in 1991 as the 119-room Best Western Gettysburg Hotel and is a member of the "Historic Hotels of America"
 - Hotel guests have the opportunity to relive the historic events of Gettysburg, all within walking distance of the battlefield, attractions, shops, and restaurants

Objective 4: 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

With Virginia's destination diversity and offerings, economic strength, and facility offerings, Virginia has the opportunity to grow and enhance its meetings market. Facilities to hold events, combined with attractive destination features, such as accommodations, transportation accessibility, affordability, activities and entertainment, and population base are critical for attracting various types of meeting events. These may include meetings, conferences, conventions, trade shows, exhibitions, trainings/seminars, and others for associations, corporations, government organizations, social, military, educational, and fraternal groups, and others. Proximity to Washington D.C. will continue to position Virginia well for government-related and corporate business in particular. This geographic position, along with Virginia's notable facilities such as the National Conference Center, Richmond Convention Center, Hampton Roads Convention Center, and Virginia Beach Convention Center, and strong destination attributes will continue to be important for the meetings market. On a smaller scale, the Wytheville Meeting Center, Danville's Institute Conference Center, and the Smithfield also offer meeting and event opportunities.

Strategies are presented as steps to enhance the meetings market, some of which are more applicable in certain areas than others depending upon the level of facilities offered and the destination maturity. The matrix below is a summary of the strategies and the pages that follow provide a detailed description of each strategy. In regards to the priority/timing, red indicates a high priority and blue indicates a medium priority.

Strategy	Priority/ Timing	Key Stakeholder Roles	Potential Measures of Success	Comparable Case Study
Develop and expand group event facilities in strategic locations	●	Local Govt - Planning/Eco Development, DMOs, Hospitality Associations, Private Businesses, Downtown Development Associations, and other community organizations	Number of meeting facilities studied, planned, and completed	Irving Convention Center, Irving, Texas
Enhance meeting facilities through supporting elements	●	Local Govt - Planning/Eco Development, DMOs, Hospitality Associations, Private Businesses, Downtown Development Associations, Chambers of Commerce, VA Dept of Business Assistance, DHCD, and other community organizations, Virginia	Number of supporting amenities studied, planned, and developed Number of zones or districts created surrounding meeting facilities Increase in resident and visitor satisfaction	National Harbor, Maryland

		Chamber		
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Products - Meetings

Strategy 1) Develop and expand group event facilities in strategic locations

New event facilities for meetings and venue expansions should be evaluated. Meeting facilities may include purpose-built facilities such as convention centers, conference centers, and conference hotels/resorts, as well as other hotels with meeting space, universities, arenas, community venues, and unique venues (historic attractions, museums, performing arts centers, etc.). Virginia's existing meetings facilities are largely concentrated in the Northern, Central, and Hampton Roads regions.

Actions:

- Study new developments and expansions of meeting facilities to understand the local, regional, and national market for events in a particular destination. Facilities should be developed with the intention of maximizing economic impact, yet overall value to a community for local events should also be considered. Each destination is unique in its ability to attract out-of-state business and serve the needs of the local/regional community. Larger, urban destinations are often best suited for purpose-built facilities, but more rural destinations can also be well positioned for resorts and venues designed for corporate retreats.
- Leverage destination characteristics for distinction among the significant level of competitive supply available on a regional and national basis, which may range from mountain lodges to eco-oriented coastal retreats

Potential Success Factors:

- Marketing efforts targeted to key markets suitable for facility type and destination type
- Investment led by public sector as part of a community's economic development strategy
- Promotion to business community and residents to garner support
- Exploration of economic incentives, which may include tourism zones
- Consideration of public/private partnerships to ensure development
- Supporting amenities (lodging, dining, retail, and entertainment) near the meeting

Priority/Timing: Medium

Key Stakeholder Roles: Local Govt - Planning/Eco Development, DMOs, Hospitality Associations, Private Businesses, Downtown Development Associations, and other community organizations

Potential Measures of Success:

- Number of meeting facilities studied, planned, and completed

Example Destinations:

- Virginia: The National Conference Center
- National: Irving Convention Center (Texas)
 - Opened the Irving Convention Center at Las Colinas in 2011 after significant study of the type and size of facility to effectively compete as a destination in the highly saturated and competitive Dallas/Fort Worth Metroplex
 - Designed as a multi-functional center to host simultaneous events ranging from meetings with exhibits to amateur sporting events. While the center has the capacity to accommodate groups of up to 4,000 people, Irving largely targets groups in the 800 to 1,200-person range.
 - Plans to further develop Las Colinas urban center include hotel and entertainment center development

facilities as well as transportation access

Products - Meetings

Strategy 2) Enhance meeting facilities through supporting elements

Efforts to further develop supporting amenities that improve the meeting attendee experience and destination competitiveness should be pursued. Supporting amenities for meeting facilities such as accommodations, unique dining, retail, and entertainment are critical elements for success of meeting facilities. These elements also make up the same fundamentals for developing attractive destinations. Such pursuits for a headquarter hotel in Virginia Beach and proposed redevelopment of the Norfolk Waterside Festival Marketplace are just a couple of examples of this continuous area for improvement for destinations, which may involve public sector investment to ensure development.

Actions:

- Evaluate business offerings, which help to maximize the business mix for meeting and event attendees
- Continue to provide an appealing environment to visitors within proximity to meeting facilities and/or offer on-site amenities. The proximate area should provide distinctive experiences for visitors showcasing the destination character.
- Ensure a complement of hotel supply on site or within walking distance of new development or expansions as well as supporting restaurants, retail, and entertainment establishments that are unique for the destination and transportation access. Businesses should be encouraged to operate during hours conducive to meeting attendee behaviors, including evenings and weekends.
- Provide incentives for targeted business types

Potential Success Factors:

- Supporting elements part of a community's economic development strategy
- Exploration of economic incentives, which may include tourism zones
- Consideration of public/private partnerships to ensure development

Priority/Timing: High

Key Stakeholder Roles: Local Govt - Planning/Eco Development, DMOs, Hospitality Associations, Private Businesses, Downtown Development Associations, Chambers of Commerce, VA Dept of Business Assistance, DHCD, and other community organizations, Virginia Chamber

Potential Measures of Success:

- Number of supporting amenities studied, planned, and developed
- Number of zones or districts created surrounding meeting facilities
- Increase in resident and visitor satisfaction

Example Destinations:

- Virginia: The Hotel Roanoke and Conference Center and Roanoke's downtown area
- National: National Harbor, Maryland
 - Located on 300 acres on the Potomac waterfront in Maryland and developed as a convention and entertainment district
 - Gaylord National Resort and Conv. Center is the cornerstone of the \$2.1 billion mixed-used development with more than 2,000 guestrooms
 - Supporting elements include four additional hotels, restaurants, retail stores, condominiums, a full-service marina, and commercial office space

-
- Leveraging assistance from resources such as DHCD, VDEP, and Dept of Business Assistance

Objective 5: Facilities for participant and spectator sporting events are enhanced and developed

Sporting events related to both spectator and participant sports have the potential for significant tourism drivers. Participant sports draw not only the athletes, but families of those athletes, while spectator sports draw both traveling fans and attendees from the local area. Virginia has developed facilities to attract and hold a variety of sports events including those for youth, college, elite athletes, professional, minor league, and motorsports. Strategies are presented as steps to enhance the sports event market, some of which are more applicable in certain areas than others depending upon the level of facilities offered. Please note that an objective related to events is noted in Objective 10.

The matrix below is a summary of the strategies and the pages that follow provide a detailed description of each strategy. In regards to the priority/timing, red indicates a high priority and blue indicates a medium priority.

Strategy	Priority/ Timing	Key Stakeholder Roles	Potential Measures of Success	Comparable Case Study
Develop and enhance youth and amateur athletic facilities	●	Local Govt - Parks & Rec, Sports Associations, Universities/Colleges, DMOs	Number of facilities planned, studied, and developed Increase in number of youth tournaments/events	Frisco, Texas
Develop and enhance college and elite athletic facilities	●	Colleges/Universities, Local Govt, DMOs, Sports Associations, Private Businesses	Number of college/elite sports facilities studied, planned, or developed Increase in number of sports events /tournaments and ancillary events	Louisiana State University, Baton Rouge, Louisiana
Develop and enhance spectator sport facilities for minor or professional sports	●	Local Govt - Planning/Eco Development, Team Ownership/Management, Private Businesses, DMOs	Number of minor/pro sports facilities planned, studied, developed Number of minor/pro sports teams maintained or secured	The Sprint Center, Kansas City, Missouri
Develop and enhance experiences related to motorsports	●	Local Govt - Planning/Eco Development, DMOs, Attraction Management, including raceway management, Private Businesses	Number of motorsports experiences planned, studied or developed Number of races retained Increased event attendance	East Lincoln Speedway, Stanley, North Carolina

Products - Sports

Strategy 1) Develop and enhance youth and amateur athletic facilities

Participatory sports have the potential to not only provide activities for local children and adults, but also attract players and families from around the state and nation as they participate in camps and tournaments. Destinations such as Richmond, Salem, Virginia Beach, and others in Northern Virginia have penetrated the youth sports market. Facilities may include baseball/softball fields, soccer fields, volleyball courts, basketball courts, football fields, swimming venues, and other multipurpose sports venues. Parks, schools, colleges/universities, and other locations with single fields can be utilized for local club sports and leagues to garner local participation. Additional development to pursue youth and amateur sports should be explored.

Actions:

- Continue to penetrate the youth/amateur sports market in strategic locations
- Explore the development of facilities to attract regional and national events, such as Amateur Athletic Union (AAU) and US Youth Soccer events. These usually require facilities with at least four basketball/volleyball courts, or six soccer fields, or eight baseball/softball fields. Communities should be encouraged to begin development with concentration in fields/facilities in which the community has local support and then expand into other sports types.
- Plan and coordinate opportunities for residents and local businesses to participate in and support the sports programs and facilities
- Cluster sports field/facility development and explore the development of marquee field/facility to championship match viewing. Include lighting, stands, shade cover, and visitor concessions/amenities.

Potential Success Factors:

- Potential support from a sports commission or other organization which can provide the funding needed to acquire business in the highly competitive sports market

Priority/Timing: High

Key Stakeholder Roles: Local Govt - Parks & Rec, Sports Associations, Universities/Colleges, DMOs

Potential Measures of Success:

- Number of facilities planned, studied, and developed
- Increase in number of youth tournaments/events

Example Destinations:

- Virginia: Virginia Beach has a large concentration of youth and amateur youth sports facilities
- National: Frisco, Texas
 - Made significant public investment in the development of sports venues for professional, amateur, and youth sports to develop the city as a destination for tourism and visitors, to improve the quality of life for Frisco residents, and to differentiate the city from other local communities
 - Since 1998, Frisco has developed four major venues: Frisco Superdome, Dr. Pepper Ballpark, Dr. Pepper Arena, FC Dallas Stadium

-
- Investment for the development or enhancement of youth/amateur sports facilities likely led by the public sector
 - Promotion on the benefits of initiatives to business community and residents
 - Local support from clubs and associations
 - Exploration of economic incentives and consideration of public/private partnerships
 - Availability of supporting amenities, such as accommodations (particularly family-oriented), dining, retail, and family entertainment in the destination

Products - Sports

Strategy 2) Develop and enhance college and elite athletic facilities

With Virginia's strong collegiate base, including University of Virginia, Virginia Tech, Old Dominion and others, Virginia has the opportunity to further leverage its strong athletic programs to increase visitors to the state. In addition to providing spectator events, college athletics can help recruit out-of-town students to the school, attract out-of-town visitors and alumni for games, spark ancillary developments, attract corporations, create jobs, and provide exposure of the community and state on national television and other media outlets.

Actions:

- Explore the development and improvement of major game day venues, such as stadiums, arenas, and ballparks, elite training facilities for Olympic-caliber athletes, and intramural fields that can be used by students, locals, and other organized groups. Investment in facilities is intended to continue spectator attendance.
- Balance the need to upgrade historic facilities with the ability to accommodate more visitors and include premium seating features, yet still include innovative and modern technology in facilities for spectators and attraction of elite athletes
- Build up other events in connection with major sporting event weekends

Potential Success Factors:

- Investments for the development or improvement of collegiate athletic facilities is likely to be led by the college, with project funds coming from alumni and other donors, sponsorships, and premium seating
- Support from students, alumni, donors, residents, and the business community is critical, and as such, promotion of the benefits of initiatives should be communicated to garner support for the project
- If appropriate, public/private partnerships should also be considered to ensure development
- Availability of supporting amenities for athletic facilities, such as accommodations, dining,

Priority/Timing: Medium

Key Stakeholder Roles: Colleges/Universities, Local Govt, DMOs, Sports Associations, Private Businesses

Potential Measures of Success:

- Number of college/elite sports facilities studied, planned, or developed
- Increase in number of sports events /tournaments and ancillary events

Example Destinations:

- Virginia: The University of Virginia
- National: Louisiana State University, Baton Rouge
 - Top Tier athletic program that ranks 7th for all time NCAA championships
 - Continues to invest in facilities with new developments, renovations, and enhancements to older facilities in an effort to continue to draw spectators and invest in athletic program
 - Opened the 10,150-seat Alex Box Stadium in 2009, used for baseball, and the approximately 2,500-seat Tiger Park, used for softball
 - Tiger Stadium underwent expansions in 2000 and 2005, and has plans for an additional expansion that will be completed in 2014, which will increase the seating capacity to over 100,000

retail, and entertainment, near the athletic facilities

Products - Sports

Strategy 3) Develop and enhance spectator sport facilities for minor or professional sports

Spectator sports not only have the ability to strengthen and even define the character of a community, but can positively impact the economy by providing jobs and attracting new business and other ancillary developments. Continued minor league support and recent initiatives such as expanding the Washington Redskins practice facility in Loudoun County and moving the training camp to Richmond in 2013 help demonstrate the demand for professional sports. In addition, the construction of an arena and relocation of the Sacramento Kings to Virginia Beach has also been proposed.

Actions:

- Explore the development or improvement of spectator sports facilities in an effort to retain and increase, if feasible, the number of minor league and professional sports teams in the Commonwealth. New facilities should be developed with the latest technology and design and include features which allow for family-friendly activities on site and pet-friendly elements.

Potential Success Factors:

- Investments for development involve funds coming from private investors, government, professional or minor league sports teams and leagues, sponsorships, and premium seating
- Support from residents, local and state government, and the business community
- Promotion of the benefits of initiatives communicated to garner support for the project
- Exploration of economic incentives, including public/private partnerships to ensure development
- Availability of supporting amenities for athletic facilities, such as accommodations, dining, retail, and entertainment, near the athletic facilities

Priority/Timing: Medium

Key Stakeholder Roles: Local Govt - Planning/Eco Development, Team Ownership/Management, Private Businesses, DMOs

Potential Measures of Success:

- Number of minor/pro sports facilities planned, studied, developed
- Number of minor/pro sports teams maintained or secured

Example Destinations:

- Virginia: LewisGale Field at Salem Memorial Baseball Stadium located in Salem
- National: The Sprint Center, Kansas City
 - 18,000-seat multi-purpose arena that cost \$276 million and opened in 2007 with 72 suites and approximately 1,400 club seats
 - Despite not having a professional sports tenant, the arena has proven to be a success as it hosts more than 100 events per year including concerts, family shows, and special events, as well as professional, collegiate, and amateur sporting events
 - Major events include exhibition NHL games, Big 12 Conference Men's Basketball Tournament, and multiple large concerts

Products - Sports

Strategy 4) Develop and enhance experiences related to motorsports

With venues such as the Richmond International Raceway, Virginia International Raceway (VIR), Martinsville Speedway, and others, Virginia has the opportunity to enhance motorsports experiences for visitors. VIR hosts events such as the Grand-Am Rolex Sports Car Series and the American Le Mans Series. It also hosts corporate events and serves as a test track to companies working on research, innovation, and development of motorsports equipment at the Virginia Motorsports Technology Park. Its campus includes three hotels, spa, several dining options, and activities such as karting, skeet, and two golf courses.

NASCAR has reported struggling event attendance in recent years, some of which has been attributed to the economy, highlighting the importance of strategic planning for investments related to tourism in this area. The level of capital investment in this area should be studied and may be most appropriate for communities that have maintained or seen event growth as well as interest from visitors. However, additional experiences related to motorsports have the potential for increased visitor spending and other visitation during non-event times.

Actions:

- Develop attractions and experiential activities for both race enthusiasts and visitors on non-race days throughout the year. Potential developments may include museums related to racing history, interactive entertainment or exhibitions, test tracks, the "NASCAR experience" on-track driving, and festivals and events held in addition to races. Kid-friendly elements could include a themed playground with racing cars/replicas and a remote control racing and car park.
- Ensure major races, including NASCAR and Le Mans Series are retained at Virginia motorsports tracks

Priority/Timing: Medium

Key Stakeholder Roles: Local Govt - Planning/Eco Development, DMOs, Attraction Management, including raceway management, Private Businesses

Potential Measures of Success:

- Number of motorsports experiences planned, studied or developed
- Number of races retained
- Increased event attendance

Example Destinations:

- Virginia: Virginia International Raceway
- National: East Lincoln Speedway, Stanley, NC
 - Smaller destination in the state. It has a 3/8 mile clay oval with racing ranging from Super Late Models to go-karts.
 - In addition to its regular Saturday night racing program, the track has been open for testing, special events, and for use as a movie set
 - Since acquisition in 2008, investments have been made in fan and racing safety and plans for expansion of grandstands and parking
 - North Carolina is home to 90 percent of NASCAR teams, the NASCAR Hall of Fame, more than 80 tracks, and nearly 10 motorsports related colleges
 - Motorsports industry has an economic impact of \$6 billion to the state

Potential Success Factors:

- Coordination among attraction management and raceways related to promotions and event timing
- Promotion of new motorsports experiences to key target markets, including residents
- Cooperation on promotions, including cross-promotions, discounting, etc. among attraction management and raceways
- Incentives, grants, and other funding vehicles encouraged for new developments

Objective 6: Culinary visitor experiences (wineries, aqua/agri-tourism, dining, etc.) are established and expanded

Culinary experiences are an integral part of a visitor's overall experience in a destination, and a destination's culinary offerings enhance its culture and heritage through food and drink. In addition, visitors are increasingly seeking out food and drink experiences and experiential elements in destinations. Virginia has a deep agricultural history and continues to evolve its offerings to include wine, emerging craft beer and distilleries, and food products including, but not limited to, crab, oysters, ham, and peanuts. Strategies are presented as steps to enhance culinary experiences, some of which are more applicable in certain areas than others depending upon the level of culinary assets offered.

The matrix below is a summary of the strategies and the pages that follow provide a detailed description of each strategy. In regards to the priority/timing, red indicates a high priority and blue indicates a medium priority.

Strategy	Priority/ Timing	Key Stakeholder Roles	Potential Measures of Success	Comparable Case Study
Expand wine tourism experiences	●	Local Govt - Planning/Eco Development, DMOs, VTC, Attraction Management (Wineries), VA Wine Board, VA Wine Marketing Office, VA Wineries Association, VA Dept of Business Assistance, VA Dept Agriculture and Consumer Services	Number of new wineries planned and developed Number of winery improvements/expansions planned and developed Number of wine centers and tasting rooms planned and developed Number of events and festivals incorporating wine	Oregon
Develop tourism related to Virginia's growing breweries and distilleries	●	Local Govt - Planning/Eco Development, DMOs, Attraction Management (Brewery/Distillery), VTC, VA Craft Brewers Guild, VA Dept of Business Assistance, VA Dept of Agriculture and Consumer Services	Number of brewery/distillery experiences developed or expanded Number of events and festivals incorporating brewery beer and distillery products	Kentucky Bourbon Trail
Develop and enhance visitor experiences related to Virginia's agriculture and aquaculture products	●	Local Govt - Planning/Eco Development, Attraction Management (Agri/Aqua-tourism Businesses), VA Dept of Agriculture and Consumer	Number of agri-tourism experiences developed or expanded Number of aqua-tourism	Maine's Lobster Industry

		Services, VTC, DMOs, Chambers of Commerce, VA Dept of Business Assistance	<p>experiences developed or expanded</p> <p>Number of events and festivals incorporating local agriculture and aquaculture</p>	
Build reputation as a destination for dining and continue to develop unique restaurant experiences	●	DMOs, Restaurant Owners, VTC, Chambers of Commerce, VA Dept of Business Assistance, Local Govt	<p>Number of restaurants added to restaurant rating guides</p> <p>Number of national media stories related to Virginia food and dining</p> <p>Number of four- and five-star restaurant experiences planned and developed</p> <p>Number of culinary events and festivals, including restaurant weeks</p> <p>Increase in attendance at culinary events and festivals</p> <p>Number of new experiential culinary offerings added</p>	Asheville, North Carolina
Develop and expand trails to enhance culinary experiences	●	DMOs, Attraction Management, VTC, Chambers of Commerce, VDOT, Local Govt	<p>Number of trails planned, developed, or expanded</p> <p>Number of events and festivals connected with trails</p> <p>Number of trails connected with other visitor themes</p>	Louisiana Culinary Trail

Products - Culinary

Strategy 1) Expand wine tourism experiences

With over 200 wineries throughout the Commonwealth and ranking among the top 10 wine travel destinations worldwide, Virginia has established itself as a destination for wine. Efforts to build upon Virginia's industry base and recognition should continue as an element of culinary tourism for the state.

Actions:

- Continue to broaden visitor experiences of on-site amenities, including tasting rooms, retail, accommodations (B&Bs and resorts with wine theme), indoor/outdoor seating, food service and restaurants (well-known chef partner for restaurant), tours, group and event facilities for group functions/tour groups, meetings, concerts, social events, weddings, wine classes, art galleries, etc.
- Develop and enhance outlets which promote Virginia's wines and wineries, which may include tasting rooms and retail locations in town/city center locations, airports, and other locations, such as visitor centers which serve to promote winery experiences and Virginia's wine. Historic buildings in town/city center locations could, for example, serve as wine tasting rooms.
- Consider the inclusion of family-friendly elements such as grape stomping activities, play areas, picnic areas, pet-friendly areas, etc.
- Continue to use events and festivals as a means to promote and enrich wine tourism experiences. This includes wine events such as those taking place during Virginia Wine Month as well as other festivals and events where Virginia wines may be featured, promoted, and served.
- Explore the access to wineries from outdoor trails
- Ensure parking infrastructure to accommodate tour buses, RVs, larger vehicles, etc., as appropriate

Priority/Timing: High

Key Stakeholder Roles: Local Govt - Planning/Eco Development, DMOs, VTC, Attraction Management (Wineries), VA Wine Board, VA Wine Marketing Office, VA Wineries Association, VA Dept of Business Assistance, VA Dept Agriculture and Consumer Services

Potential Measures of Success:

- Number of new wineries planned and developed
- Number of winery improvements/expansions planned and developed
- Number of wine centers and tasting rooms planned and developed
- Number of events and festivals incorporating wine

Example Destinations:

- Virginia: Charlottesville
- National: Oregon
 - The wine industry in Oregon dates back to the 1960s and has evolved into a world-class wine growing state with 15 winegrowing regions and more than 72 grape varieties
 - Oregon ranks fourth largest in the number of wineries, but still remains focused on producing small-batch artisan wine
 - Oregon recently instituted a sustainable winery certification program, which aligns with and reinforces the state's image and branding as an eco-friendly and "green" destination

Potential Success Factors:

- Wine promotions and ensure winery information is easily accessible through mobile channels
- Distinguishing wine experiences for visitors with the numerous wineries across Virginia, yet continue to collaborate on promotions and wine trails
- Evaluation and amendment of ordinances or policies which may limit development at wineries or on agricultural land to increase tourism
- Leveraging resources for assistance including the Virginia Wineries Association Wine Board, Wine Marketing Office, and Virginia Department of Agriculture and Consumer Services
- Encouragement of Virginia wines to be sold at restaurants

Products - Culinary

Strategy 2) Develop tourism related to Virginia's growing breweries and distilleries

Virginia has grown to 50 breweries and distilleries, and experiences for visitors should be further developed.

Actions:

- Enhance and develop experiences similar to those of wine tourism for this market as it relates to on-site activities, to the extent permitted under regulations, such as tasting rooms, retail, restaurant (which may include an innovative gastro pub) and food service, accommodations (which may include a craft beer theme), tours, group and event facilities for group functions/tour groups, meetings, concerts, social events, etc. as well as trails and events
- Include brewery and distillery products as part of the wine centers, and brewery/distillery information should be easily accessed through mobile channels
- Include brewery history and tie in Virginia history with locations in historic structures/buildings
- Build upon the theme of distilleries and Virginia's history and develop experiences related to Virginia's moonshine history
- Continue to use events and festivals as a means to promote craft beer and distillery tourism experiences. This includes wine events such as those taking place during Craft Beer Month, Oktoberfests, and other festivals and events where Virginia products may be featured, promoted, and served.
- Explore the access to breweries/distilleries from outdoor trails
- Ensure parking infrastructure to accommodate tour buses, RVs, larger vehicles, etc. , as appropriate

Potential Success Factors:

- Promotions, particularly as breweries and distilleries continue to grow, and brewery/distillery information easily accessible through mobile channels

Priority/Timing: Medium

Key Stakeholder Roles: Local Govt - Planning/Eco Development, DMOs, Attraction Management (Brewery/Distillery), VTC, VA Craft Brewers Guild, VA Dept of Business Assistance, VA Dept of Agriculture and Consumer Services

Potential Measures of Success:

- Number of brewery/distillery experiences developed or expanded
- Number of events and festivals incorporating brewery beer and distillery products

Example Destinations:

- Virginia: Brew Ridge Trail, Nelson and Albemarle Counties and Charlottesville
- National: Kentucky Bourbon Trail
 - Trail created by Kentucky Distillers Association in 1999, which has become one of the state's most popular attractions
 - Consists of seven distilleries located within an hour of each other and includes the Jim Beam Distillery and Wild Turkey Distillery
 - Provides visitors with a behind-the-scenes tour of the bourbon making process, ending with a bourbon tasting
 - Passport program developed
 - Louisville leveraged trail popularity and developed the Urban Bourbon Trail of 20 bars

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- Distinguishing visitor experiences
 - Continuing to collaborate on promotions and trails
 - As an emerging area, potential additional investment to spur development and promotions, and exploration of incentives
 - Evaluation and amendment of ordinances or policies which may limit development at breweries/distilleries or on agricultural land to increase tourism

Products - Culinary

Strategy 3) Develop and enhance visitor experiences related to Virginia's agriculture and aquaculture products

Virginia's vast agriculture and aquaculture assets, including signature products related to wine, produce, peanuts, ham, crab, oysters, and others, position Virginia to enhance and develop agri-tourism and aqua-tourism experiences. These experiences allow visitors to see farms, animals, harvest fruits and vegetables, purchase fresh products and homemade goods, and experience commercial fishing, oyster farms, crabbing, clams, and fisheries.

Actions:

- Continue to broaden on-site amenities at farms, including accommodations (B&Bs), family- friendly activities, food service, product tasting, educational/scientific experiences, tours, group and event facilities for group functions/tour groups, event facilities for meetings, concerts, social events, etc.
- Develop and enhance aquaculture experiences for visitors related to oyster fishing, crabbing, commercial fishing, and fisheries. Tour opportunities should be further developed, enhanced, and promoted for these unique visitor experiences. A certification program, similar to Virginia's Eco-tour Guide, should be explored for aquaculture experiences, where guides are used for boating tours.
- Continue to enhance agriculture and aquaculture visitor themes through farmers' markets
- Continue to use events and festivals to celebrate culinary heritage and as a means to promote Virginia's agriculture and aquaculture products. Culinary heritage events may be related to Brunswick stew, cast iron cook-off, and Chesapeake Bay oysters, to name a few. Signature food festivals and other festivals and events where Virginia products may be featured, promoted, and served should be continued.
- Ensure parking infrastructure to accommodate tour buses, RVs, larger vehicles, etc. , as appropriate

Potential Success Factors:

- Collaboration among attraction management on promotions, trails, and events

Priority/Timing: Medium

Key Stakeholder Roles: Local Govt - Planning/Eco Development, Attraction Management (Agri/Aqua-tourism Businesses), VA Dept of Agriculture and Consumer Services, VTC, DMOs, Chambers of Commerce, VA Dept of Business Assistance

Potential Measures of Success:

- Number of agri-tourism experiences developed or expanded
- Number of aqua-tourism experiences developed or expanded
- Number of events and festivals incorporating local agriculture and aquaculture

Example Destinations:

- Virginia: Rappahannock River Oysters
- National: Maine's lobster industry
 - Visitors may take a lobster boat tour to learn about lobster harvesting from a licensed fisherman and enjoy the scenic coastline. Some boats allow visitors to catch and cook on the boat.
 - Visitors enjoy fresh lobsters as local restaurants
 - Maine Lobster Festival held in Rockland has grown to approximately 100,000 attendees and features a parade, lobster cooking contest, and marine tent which provides visitors a hands-on opportunity to touch and learn about a variety of marine life

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- Potential investment to spur development and exploration of incentives for this area
 - Evaluation and amendment of ordinances or policies which may limit development on agricultural land
 - Formation of an agri/aqua-tourism professional association, found in a number of other states, is also suggested to further develop tourism efforts
 - Leverage programs through the USDA and assistance through the Virginia Department of Agriculture and Consumer Services

Products - Culinary

Strategy 4) Build reputation as a destination for dining and continue to develop unique restaurant experiences

Virginia is home to a range of dining experiences and locally-owned restaurants, including fine dining, farm-to-table, gastronomy, rising chefs, etc. with nationally ranked restaurants, but Virginia is not necessarily well recognized as a food destination. Improving dining opportunities, which help to build destinations and create opportunities for distinctive experiences for visitors and residents, should be pursued, while existing dining strengths are further emphasized.

Actions:

- Build reputation of destinations and restaurants through rating guide entries, PR, television opportunities, social media, well-known chefs, and signature events
- Develop new unique dining experiences and incorporate distinctive food for the region, local agriculture, Virginia foods, farm-to-table elements, wine, and seafood to ensure unique Virginia experiences
- Use food events and festivals to strengthen Virginia's culinary reputation. Culinary should continue to play a strong role in other themed events, including concerts, arts, outdoors, and other events, and include signature events which feature Virginia's agriculture and aquaculture products
- Cluster development of dining experiences
- Continue to leverage Virginia's wine and growing breweries to further develop foodie culture
- Explore development of experiential culinary classes targeted to visitors
- Explore the development/enhancement of culinary institutes to help raise culinary profile

Potential Success Factors:

- Collaborative effort among restaurant owners, Virginia residents, and DMOs
- Exploration of incentives related to small business development and tourism zones

Priority/Timing: High

Key Stakeholder Roles: DMOs, Restaurant Owners, VTC, Chambers of Commerce, VA Dept of Business Assistance, Local Govt

Potential Measures of Success:

- Number of restaurants added to restaurant rating guides
- Number of national media stories related to Virginia food and dining
- Number of four- and five-star restaurant experiences planned and developed
- Number of culinary events and festivals, including restaurant weeks
- Increase in attendance at culinary events and festivals
- Number of new experiential culinary offerings added

Example Destinations:

- **Virginia: Alexandria's Restaurant Week**
- National: Asheville, North Carolina
 - With the influx of restaurants with commitment to farm-to-table practices and highly-skilled chefs, Asheville became the world's only Foodtopian Society
 - Currently, there are nearly 250 independent restaurants, 12 farmers markets, and many craft breweries

Products - Culinary

Strategy 5) Develop and expand trails to enhance culinary experiences

Winery trails from "D.C.'s Wine Country" in Northern Virginia to the Blue Ridge Wineway in Southwest Virginia are spread across the state. Trails for wineries, breweries, distilleries, farms, and restaurants or dining destinations should continue to be created. Such trails help to connect culinary experiences and destinations, reinforce authenticity, and deepen the visitor experience.

Actions:

- Continue to develop and expand wine trails as new wineries open
- Develop and expand brewery and distillery trails as more distilleries open
- Use trails to connect to farms, markets, and destinations. An example could be through barn art using traditional quilt squares to create a connection among farms, incorporate traditional arts, and catch visitor interest in rural areas.
- Develop foodie trails or itineraries which help showcase Tastes of Virginia within destinations and among various locations
- Incorporate various types of restaurants in culinary trails from fine dining to diners with a variety of food diversity
- Include a mix of urban and rural trails
- Connect trail locations through various means, including outdoor trails (biking, horse etc.)
- Incorporate events along culinary trails, from culinary crawls to outdoor events
- Explore improvement to trail locations to accommodate group business on site with facilities and parking infrastructure
- Seek opportunities to tie culinary trails with other visitor themes such as history/heritage, arts & music, and others

Priority/Timing: Medium

Key Stakeholder Roles: DMOs, Attraction Management, VTC, Chambers of Commerce, VDOT, Local Govt

Potential Measures of Success:

- Number of trails planned, developed, or expanded
- Number of events and festivals connected with trails
- Number of trails connected with other visitor themes

Example Destinations:

- **Virginia: D.C.'s Wine Country**
- National: Louisiana Culinary Trail
 - Developed to rebuild tourism following Hurricane Katrina
 - Emphasizes Louisiana's Cajun and Creole culinary heritage and position as a top-ranked destination for food
 - Total of seven distinct trails based on geography and culinary offerings, including 'Red River Riches,' 'Delta Delights,' 'Prairie Home Cooking,' 'Capital Cuisine,' 'Seafood Sensation,' 'Bayou Bounty,' and 'Creole Fusion'
 - Stops along trails include a mix of mom-and-pop cafes, upscale restaurants, hole-in-the-wall hideaways, farmers markets, sandwich shops, seafood joints, roadside stands, local grocery stores, bakeries, and food festivals
 - Marketed through a guidebook and website

Potential Success Factors:

- Promotion of culinary trails
- Strategically branded trails to distinguish visitor experiences for trails that connect various destinations, other visitor themes, and specific culinary experiences. Other visitor themes may include history, arts, music, and the outdoors, such as trails connected by biking paths
- Collaborative efforts among public and private stakeholders as trail development (depending on scale) may require significant planning efforts
- Collaboration on promotions required by attraction management and DMOs
- Signage for trails along with maps and visitor information that are visible and easily accessible through electronic channels and mobile devices
- Exploration of incentives to encourage private sector investment in visitor amenities to support trail visitors

Objective 7: Visitor experiences related to music and arts (performance, visual, craft, etc.) are created and enriched

A destination's music and arts experiences enhance its culture and heritage. With Virginia's combination of music and arts heritage, modern experiences related to various musical genres as well as performance, visual, and craft-related arts, Virginia has the opportunity to further utilize these assets to attract visitors. Several strategies are presented as steps to enhance arts and music experiences, some of which are more applicable in certain areas than others depending upon the type of experiences available in various destinations and investment that has occurred to date.

The matrix below is a summary of the strategies and the pages that follow provide a detailed description of each strategy. In regards to the priority/timing, red indicates a high priority and blue indicates a medium priority.

Strategy	Priority/Timing	Key Stakeholder Roles	Potential Measures of Success	Comparable Case Study
Develop and enhance music and performance art venues	●	Local Govt - Planning/Eco Development, Arts Commission/Council, Local Arts Organizations, Private Businesses, Chambers of Commerce, DMOs, VTC, Virginia Commission for the Arts, Artisan Center of Virginia, Virginia Music Associations, Non-Profit Arts & Music Organizations, Colleges/Universities Art/Music Programs	Number of music and/or performance art venues planned and developed	Austin, Texas
Enhance and develop music and art trails	●	DMOs, Arts Commission/Council, Local Arts Organizations, Local Govt, Chambers of Commerce, DMOs, VTC, Virginia Commission for the Arts, Artisan Center of Virginia, Virginia Music Associations, Private Businesses, Non-Profit Arts & Music Organizations, Colleges/Universities Art/Music Programs	Number of art trails planned and developed Number of music trails planned and developed Number of trails connected with other visitor themes Number of events and festivals connected to trails	Country Music Highway, Kentucky

Add art to public spaces	●	Art Commission/Council, Local Govt, Local Arts Organizations, Chambers of Commerce, DMOs, VTC, Virginia Commission for the Arts, Artisan Center of Virginia, Colleges/Universities Art Programs, Virginia Downtown Development Association	Number of art programs and installations Increase in resident and visitor satisfaction	Waterfire, Providence, Rhode Island
Develop and enhance concentrated arts experiences	●	Art Commission/Council, Local Govt, Local Arts Organizations, Chambers of Commerce, DMOs, VTC, Virginia Commission for the Arts, Artisan Center of Virginia, Colleges/Universities Art Programs, Virginia Downtown Development Association	Number of new designated arts & cultural districts Number of art facilities planned and developed (markets, communes, institutes)	Chautauqua Institution, New York

Products - Arts & Music

Strategy 1) Develop and enhance music and performance art venues

Virginia should continue to build upon its musical heritage and strengths among a variety of genres, including folk, country, bluegrass, hip-hop, and rock n' roll as well as the performing arts. With venues ranging from Wolf Trap National Park for the Performing Arts to Carter Family Fold, Virginia offers diverse music and performing arts opportunities.

Actions:

- Explore the development of venues, including theatres, outdoor amphitheatres, large concert and performance halls, temporary outdoor performance stages/areas, and club venues in strategic locations to allow for new and expanded events and festivals
- Maintain current performance venues
- Explore the development of an art and/or music institute which can be used as a **performance venue, attracting additional musicians and artists and raising Virginia's arts and music profile**

Potential Success Factors:

- Clustering of venues for a range of musical experiences should be explored to further enhance musical culture in a concentrated area
- Attracting talent, shows, and productions should be an area of concentration to ensure venue attractiveness
- For multiple venues in an area, coordination among venue management is encouraged to ensure maximized venue attendance and cooperative promotions, where appropriate
- Investment from the public sector may be required to spur development, and incentives should be explored. If appropriate, public/private partnerships should also be considered to ensure development.
- Resources for arts and music venue development should be leveraged from state and national programs such as the National Endowment for the Arts' Visual Arts Program,

Priority/Timing: Medium

Key Stakeholder Roles: Local Govt - Planning/Eco Development, Arts Commission/Council, Local Arts Organizations, Private Businesses, Chambers of Commerce, DMOs, VTC, Virginia Commission for the Arts, Artisan Center of Virginia, Virginia Music Associations, Non-Profit Arts & Music Organizations, Colleges/Universities Art/Music Programs

Potential Measures of Success:

- Number of music and/or performance art venues planned and developed

Example Destinations:

- Virginia: Bristol - "Birthplace of Country Music"
- National: Austin, Texas
 - Austin, Texas has a vibrant and established music scene spanning a variety of genres from rock and blues to country and jazz
 - Nicknamed the "Live Music Capital of the World", visitors and residents can listen to live music at one of the nearly 200 live music venues, including clubs, coffeehouses, bar, taquerias, auditoriums, and concert halls
 - Austin is also the home of world renowned festivals such as Austin City Limits and South by Southwest

Design Arts Program, and the Virginia Commission for the Arts grant programs

Products - Arts & Music

Strategy 2) Enhance and develop music and art trails

Connecting arts and music experiences enriches visitor experiences, providing opportunities to partake in additional authentic offerings and see new destinations, while tying together destinations and attractions. Initiatives similar to the Crooked Road and Round the Mountain artisan trails should be explored in other areas across the Commonwealth.

Actions:

- Explore musical trail themes that connect various musical genres and artists, while connecting destinations, understanding that it may be difficult to connect the musical venues and heritage in a similar fashion to the Crooked Road. Trails could also be explored on a smaller scale within a cluster of destinations.
- Develop and expand arts and artisan trails which provide visitors the opportunity to experience local art as well as international exhibitions
- Tie in other visitor themes such as history/heritage, agriculture, wine, etc. with trails to the extent possible. An example could be through barn art using traditional quilt squares to create a connection among farms, incorporate traditional arts, and catch visitor interest in rural areas.
- Include experiential elements along trail stops, such as classes and hands-on activities
- Utilize events and festivals to enhance trail recognition and points of interest along trails
- Explore improvement to trail locations to accommodate group business on site with facilities and parking infrastructure

Potential Success Factors:

- Developing distinctive arts and music experiences, connecting those experiences through trails, and promotions of those experiences are critical to success
- Information on trails should be readily available through electronic channels (including mobile devices), signage, and maps
- Collaboration among attraction management regarding promotions is encouraged as well

Priority/Timing: High

Key Stakeholder Roles: DMOs, Arts Commission/Council, Local Arts Organizations, Local Govt, Chambers of Commerce, DMOs, VTC, Virginia Commission for the Arts, Artisan Center of Virginia, Virginia Music Associations, Private Businesses, Non-Profit Arts & Music Organizations, Colleges/Universities Art/Music Programs

Potential Measures of Success:

- Number of art trails planned and developed
- Number of music trails planned and developed
- Number of trails connected with other visitor themes
- Number of events and festivals connected to trails

Example Destinations:

- Virginia: Crooked Road
- National: Country Music Highway, Kentucky
 - Features the birthplaces of country music stars along a 144-mile stretch of U.S. Highway 23
 - The highway was named in 1994 and has been recognized as a National Scenic Byway by the U.S. Department of Transportation since 2002
 - Sites along the highway include the Country Music Highway Museum, the Country Music Hall of Fame, and live performance venues

as coordination on event schedules to maximize attendance

- Trail development (depending on scale) may require significant planning efforts on a collaborative basis among public and private stakeholders. During the development process, the trails should be promoted to residents to garner support and inform potential visitors of coming attractions. Incentives to encourage private sector investment in visitor amenities to support trail visitors should be explored.

Products - Arts & Music

Strategy 3) Add art to public spaces

Art has the potential to not only enhance the character, destination appeal, and authenticity of a community, but also define its brand and recognition through signature visuals that come to represent the destination. Public art has emerged in destinations throughout the state, including Bedford, Luray, and Chincoteague, to name a few.

Actions:

- Incorporate art such as paintings, photography, murals, statues/sculptures, mosaics, landscape art, and other forms created by local artists to increase visual appeal and promote the local arts community
- Incorporate art where possible in public spaces and encourage display in businesses such as restaurants, hotels, retail establishments, etc.
- Use art to create iconic destination branding
- Incorporate art which reflects the destination and region, which may include a variety of themes, such as hiking, fishing, equestrian, maritime history, military history, etc.
- Explore a variety of venues, which may include utilizing wineries as galleries, rural art gardens, and other venues

Potential Success Factors:

- Adding art to public spaces will require collaboration among local governments, private businesses, and the arts community to create spaces for arts displays. Approvals for public displays, for example, will be needed from local governments.
- Promotions of art events, exhibits, and installations will be a critical factor to both residents and visitors through various means, including the use of social media
- Leveraging programs and assistance from the Virginia Commission for the Arts, Artisan Center of Virginia, and the National Endowment for the arts

Priority/Timing: High

Key Stakeholder Roles: Art Commission/Council, Local Govt, Local Arts Organizations, Chambers of Commerce, DMOs, VTC, Virginia Commission for the Arts, Artisan Center of Virginia, Colleges/Universities Art Programs, Virginia Downtown Development Association

Potential Measures of Success:

- Number of art programs and installations
- Increase in resident and visitor satisfaction

Example Destinations:

- Virginia: Piedmont Arts, Martinsville
- National: Waterfire, Providence, Rhode Island
 - The award-winning fire and musical display consists of over 100 bonfires spread throughout nearly one mile of rivers along a waterfront park and is accompanied by music
 - The artistic performance is scheduled on various nights throughout the summer months and attracts crowds ranging from 10,000 to 100,000, including both residents and visitors, and has garnered national and international media attention

Products - Arts & Music

Strategy 4) Develop and enhance concentrated arts experiences

To further enhance and promote the creative economy, concentrated experiences for arts and culture should be explored, including art districts, communes, and markets. A number of arts and cultural districts have been recognized by the Virginia Assembly, including Blacksburg, Winchester, and Petersburg. Other concentrated arts experiences include the Torpedo Arts Factory in Alexandria and Heartwood in Abingdon.

Actions:

- Continue to enhance concentrated arts experiences and allow visitors to meet artists and see and observe artists' work first hand. This area or commune can offer tours, group events, and educational classes and programs for both visitors and residents.
- Create and maintain arts and culture districts
- Explore the development of an arts institute, which is also open to visitors and may offer classes, tours, events, etc.

Potential Success Factors:

- Cooperation among government bodies and the arts community will be critical to the development, support, and promotion of arts distinctive experiences
- Concentrated arts efforts as part of a community's economic development strategy
- Direct investment from the public sector related to development and promotions may be required, and governments should create incentive programs to encourage private sector investment and attract artisans
- Evaluation and amendment of policies/ordinances which may limit the expansion of arts
- Leveraging programs and assistance from the Virginia Commission for the Arts, Artisan Center of Virginia, and the National Endowment for the Arts

Priority/Timing: Medium

Key Stakeholder Roles: Art Commission/Council, Local Govt, Local Arts Organizations, Chambers of Commerce, DMOs, VTC, Virginia Commission for the Arts, Artisan Center of Virginia, Colleges/Universities Art Programs, Virginia Downtown Development Association

Potential Measures of Success:

- Number of new designated arts & cultural districts
- Number of art facilities planned and developed (markets, communes, institutes)

Example Destinations:

- Virginia: Torpedo Factory Art Center, Alexandria
- National: Chautauqua Institution, New York
 - Not-for-profit community set on 750 acres in southwestern New York State that is centered on four program areas--the arts, education, religion, and recreation
 - Each summer, over 8,000 students (both youth and adult) enroll in summer school which offers courses in art, music, dance, theater, writing skills and other special interests, many of which take residence on property
 - The nine-week summer season attracts over 170,00 visitors

Objective 8: Other visitor experiences, which leverage Virginia's economic strengths and specialized industries are enhanced and created

In addition to Virginia's natural assets, history, culinary, and other cultural assets, Virginia has other economic assets and specialized industries that should continue to be leveraged to enhance the visitor experience. These clusters of economies provide opportunity for increased success for tourism attractions, events, and businesses which may be developed in connection with and in support of these industries. In addition to the Commonwealth's strong corporate base, specialized industries include its space industry, military, and equine industry, which provide opportunity for new and enhanced visitor experiences. Several strategies are presented as steps to enhance visitor experiences related to these areas, some of which are more applicable in certain areas than others depending upon the industries available in various destinations.

The matrix below is a summary of the strategies and the pages that follow provide a detailed description of each strategy. In regards to the priority/timing, red indicates a high priority and blue indicates a medium priority.

Strategy	Priority/ Timing	Key Stakeholder Roles	Potential Measures of Success	Comparable Case Study
Develop visitor experiences and infrastructure to leverage space launches and research taking place at Wallops Island	●	Govt - Planning/Eco Development, DMOs including the Eastern Shore Tourism Commission, Chambers of Commerce, PDCs, Virginia Commercial Space Flight Authority, NASA, VDOT, Private Businesses, VTC, Virginia Chamber	Number of space-related visitor experiences planned and developed Number of visitor infrastructure efforts completed Number of launch alternative plans completed Number of events and festivals incorporating space Number of space economic development pursuits	NASA's Marshall Space Flight Center, Huntsville, Alabama
Leverage military assets	●	Govt - Local/Military, DMOs, Departments of the Armed Forces, Military Associations, VTC	Number of experiences related to military planned and developed Increase in group business related to military	San Diego, California

			Number of itineraries, packages, and discounts developed related to military	
Leverage Virginia's equine industry and its rich history to improve visitor experiences	●	Govt - Planning, Private Businesses, Virginia Horse Shows Association, Horse Breed Associations, DMOs, Local Govt, Dept of Agriculture and Consumer Services, DCR	Number of equine experiences planned and developed Number of events and festivals with equine elements Increase in equine event attendance	Kentucky
Leverage strong corporate and business base	●	Local Govt - Planning/Eco Development, DMOs, Private Businesses, VEDP, VDOT, Hospitality Associations, Chambers of Commerce, VTC, Virginia Chamber	Increase in visitor expenditures related to business travel Increase in business visitor satisfaction Number of economic development efforts	Silicon Valley, California

Products - Industry

Strategy 1) Develop visitor experiences and infrastructure to leverage space launches and research taking place at Wallops Island

With NASA's Wallops Island Flight Facility and the Mid-Atlantic Regional Spaceport (MARS), there is an opportunity to leverage space-related tourism. Space launches are an attraction for visitors and residents that is an ongoing activity that can bring in tourists and spark ancillary development. There is also economic development potential to attract space-related businesses to the area.

Actions:

- Develop infrastructure to support visitors for launches in strategic viewing locations with accessible roads, prime views, parking, and amenities on site such as restrooms, concessions, and equipment for better viewing. These sites should be multi-purpose and available to use for other activities during inactive periods, which may include positioning these sites and locations for star-gazing and astronomical events.
- Enhance and develop experiences which build upon the launches and NASA's presence, including redevelopment of the visitors center and museum to create educational, yet modern and interactive experiences and launch pad tours
- Consider distinctive developments such as a planetarium, simulated space launches, expansion of space camp programs for families and groups on a day, weekend, or extended stay-basis and others
- Explore opportunities for events and festivals, which relate to space and may surround launches
- Pursue economic development opportunities to attract space-related businesses, educational institutions, and research facilities
- Develop visitor options for delayed launches and suggested visitor activities prior to and following launches for extended visitor stays. This includes readily visible and accessible activities and attractions that may be appealing to families and visitor types traveling to the shore for launches. This may include itineraries for Assateague Island and Chincoteague,

Priority/Timing: High

Key Stakeholder Roles: Govt - Planning/Eco Development, DMOs including the Eastern Shore Tourism Commission, Chambers of Commerce, PDCs, Virginia Commercial Space Flight Authority, NASA, VDOT, Private Businesses, VTC, Virginia Chamber

Potential Measures of Success:

- Number of space-related visitor experiences planned and developed
- Number of visitor infrastructure efforts completed
- Number of launch alternative plans completed
- Number of events and festivals incorporating space
- Number of space economic development pursuits

Example Destinations:

- Virginia: Wallops Flight Facility, Wallops Island
- National: NASA's Marshall Space Flight Center, Huntsville
 - In 1970, Alabama established the U.S. Space & Rocket Center, serving as a museum and educational center of the U.S. space program as well as the visitor information center for the nearby Marshall Space Flight Center
 - Today, it features more than 1,500 space artifacts of the U.S. space program, as well as simulators, interactive science exhibits, and IMAX and 3-D films and is the home to the U.S. Space Camp and Aviation Challenge

Tangier Island, coastal tours, special events scheduled near launch dates, and other similar options

Potential Success Factors:

- Virginia should work with NASA and MARS officials to ensure its programs and investment in its Virginia facilities are continued, which may involve economic development or other incentives. Investment in infrastructure and enhanced space experiences by the public sector will need to be developed, and incentives to support and attract tourism businesses should also be explored.
- Promotion of the launches and information availability will be critical, which should be conducted on a coordinated basis by local parties including NASA. Packages and itineraries incorporating other key attractions and accommodations should be developed.
- Cooperation with Maryland which is an existing partner for MARS
- Collaboration with Virginia Space Flight Academy
- Partnerships with NASA Langley, Virginia Air & Space Center, and Udvar-Hazy Center

Products - Industry

Strategy 2) Leverage military assets

Current and historical assets related to the military should be leveraged to enhance and develop visitor experiences related to the military, including army, navy, air force, national intelligence, etc. With strong naval history in the Hampton Roads region, active military bases, Arlington National Cemetery, and other features, Virginia is well positioned to leverage this history and presence to attract visitors.

Actions:

- Continue to leverage military heritage in attracting reunions to further increase group business. Attractions should explore creation or expansion of facilities that may accommodate group business, including facilities for group/tour function, reunion events, social functions, etc. as well as ensuring parking infrastructure is available for tour buses, RVs, large vehicles, etc.
- Explore the development of a military-themed trail connecting military heritage and active military assets
- Explore educational and experiential attractions, which may include tours of active assets, interactive museums and exhibits, events of celebration and commemoration, hands-on experiences with old equipment and vehicles (in a kid-friendly manner), opportunities to meet and interact with soldiers and veterans, and development of military experiences, such as simulated training camps and war games
- Ensure DMOs have strong relationships with military/defense organizations to coordinate accommodations for visiting military and friends and family and provide itineraries, discounts, and packages for military personnel and friends and family
- Continue air show events and explore opportunities to leverage and expand events
- Explore use of naval ships for hosting of special events, including sports events, attracting military personnel, veterans, residents, and tourists

Priority/Timing: Medium

Key Stakeholder Roles: Govt - Local/Military, DMOs, Departments of the Armed Forces, Military Associations, VTC

Potential Measures of Success:

- Number of experiences related to military planned and developed
- Increase in group business related to military
- Number of itineraries, packages, and discounts developed related to military

Example Destinations:

- Virginia: Fort Monroe, Hampton
- National: San Diego
 - San Diego has Navy, Marine Corps, and Coast Guard installations
 - Leveraged its military history and presence to develop visitor experiences
 - Attractions: USS Midway Museum, Flying Leatherneck Aviation Museum, Maritime Museum of San Diego, Marine Corps Recruit Depot Museum, San Diego Air and Space Museum, and the Veterans Museum and Memorial Center
 - Annual events: Fleet Week San Diego, the Miramar Air Show, and Salute to Navy

Potential Success Factors:

- Cooperation with Virginia's military organizations and Virginia's tourism stakeholders will be critical to ensuring authentic and respectful experiences are available for visitors
- Promotion and information availability will be critical to success, including information on procedures provided to visitors regarding entry to active military basis

Products - Industry

Strategy 3) Leverage Virginia's equine industry and its rich history to improve visitor experiences

The equine industry in Virginia is worth an estimated \$1.2 billion in expenditures. Virginia ranks 15th on the most recent listing of the number of farm-based horses in each state. Tourism is viewed as a means for continued horse industry growth through racing, shows, and other activities.

Actions:

- Encourage the equine culture in strategic locations and personify it through events such as steeplechases, polo, and competition events, accommodations such as the five-star Salamander Resort planned to open in 2013 with an equestrian theme and on-site horse facilities, community branding, architecture, art, retail offerings, horse-friendly towns, horse demonstrations in town center area, and other means
- Maintain and explore expansion of equestrian trails, including trails that may connect wineries and those that allow for carriage rides
- Continue to maintain competition venues, such as Virginia Horse Center, Commonwealth Park, and Great Meadows Event Park, and encourage events, including shows, competitions, etc.

Potential Success Factors:

- Continued marketing and promotions to this market, including participants in shows and events as well as casual travelers
- Information should be readily available to visitors regarding events and access to riding opportunities
- Ordinances or policies which may limit development on agricultural land should be evaluated and sought to be amended to increase tourism
- Communication and cooperation among equine attraction management, DMOs, and other community stakeholders

Priority/Timing: Medium

Key Stakeholder Roles: Govt - Planning, Private Businesses, Virginia Horse Shows Association, Horse Breed Associations, DMOs, Local Govt, Dept of Agriculture and Consumer Services, DCR

Potential Measures of Success:

- Number of equine experiences planned and developed
- Number of events and festivals with equine elements
- Increase in equine event attendance

Example Destinations:

- Virginia: Fauquier County
- National: Kentucky
 - Kentucky has leveraged its horse culture and history to develop visitor attractions and **experiences, particularly in the state's bluegrass region**
 - While Kentucky holds the world-renowned Kentucky Derby, which attracts over 160,000 attendees over the two-week Kentucky Derby Festival, it also offers visitors a variety of equestrian activities such as the Kentucky Horse Park, horse camps in remote locations, Kentucky Derby Museum, International Museum of the Horse, and the American Saddlebred Museum

Products - Industry

Strategy 4) Leverage strong corporate and business base

Virginia ranks sixth in the nation in the number of Fortune 500 companies and has a strong corporate base in companies serving the federal market. As part of their economic generation, these companies attract business travelers and generate meetings activity. There are also opportunities to leverage this corporate concentration in a particular industry and create specific visitor opportunities.

Actions:

- Continue economic developments and quality of life efforts to attract and maintain corporate base
- Continue to work with business to offer discounts and packages, which may spur additional visitation and spending from business travelers, such as incentives for extending stays or return visits
- Continue to support corporate visitors with accommodations positioned to serve the corporate market in strategic locations, convenient transportation access, and concentration of dining, and other features that are also important to leisure travelers
- Explore opportunities to leverage the strong corporate base to develop additional visitor attractions. Attractions could include corporate tours or corporate sponsored visitor center/museums. Potential may exist, for example, related to tours for the Rolls Royce facility in Prince George County and other similar visitor opportunities.

Potential Success Factors:

- Communication with the corporate community will be a critical factor for success to help ensure an understanding of the needs of corporate travelers to a community for future growth of this market

Priority/Timing: Medium

Key Stakeholder Roles: Local Govt - Planning/Eco Development, DMOs, Private Businesses, VEDP, VDOT, Hospitality Associations, Chambers of Commerce, VTC, Virginia Chamber

Potential Measures of Success:

- Increase in visitor expenditures related to business travel
- Increase in business visitor satisfaction
- Number of economic development efforts

Example Destinations:

- Virginia: Richmond
- National: Silicon Valley, California
 - The Silicon Valley region has a large concentration of technology corporations and has developed into a destination that appeals to both business and leisure travelers
 - Both public and private-sector investments have resulted in new tourism offerings and infrastructure
 - The area leveraged its technology roots to develop several visitor attractions including the Tech Museum of Innovation, the Computer History Museum, The Intel Museum (located at Intel headquarters), and NASA Ames Exploration Center

-
- Informing the corporate community on tourism news and events and forming strong relationships will also assist in building support, potential investment, and sponsorship for tourism initiatives

Objective 9: Commercial attractions are increased

Commercial tourism attractions are those designed for user entertainment and enjoyment, but these may not necessarily rely heavily upon inherent destination features. Examples of commercial attractions may include theme parks, water parks, aquariums, parks for extreme sports, cruise, golf, spa, and others. These developments have the potential to be signature attractions and demand generators and also complement a destination's mix of visitor opportunities. With the potential for significant investment, these should be studied to determine feasibility. Several strategies are presented as steps to enhance visitor experiences related to these areas, some of which are more applicable in certain areas of Virginia than others depending on the level of destination maturity and visitor infrastructure.

The matrix below is a summary of the strategies and the pages that follow provide a detailed description of each strategy. In regards to the priority/timing, blue indicates a medium priority.

Strategy	Priority/ Timing	Key Stakeholder Roles	Potential Measures of Success	Comparable Case Study
Explore the development of family-oriented commercial attractions	●	Local Govt - Planning/Eco Development, Private Businesses (Developers/Attraction Management), DMOs, VTC, VEDP, Virginia Dept of Business Assistance	Number of family-oriented experiences planned and developed Number of kid-friendly improvements to existing attractions	Lancaster County, Pennsylvania
Explore the development of commercial attractions designed for a higher-end, luxury market	●	Local Govt - Planning/Eco Development, Private Businesses, DMOs, VTC, VEDP, Virginia Dept of Business Assistance	Number of higher-end/luxury developments planned and completed Number of higher-end/luxury experiential offerings increased	Arizona
Maintain and explore expansion of cruise tourism	●	Local Govt - Eco Development, DMOs, Virginia Port Authority, Private Businesses (cruise, yacht companies), VEDP, Virginia Dept of Business Assistance	Number of cruise experiences added, including overnight and day cruises Number of ancillary destination improvements for cruise passengers	Port of Baltimore, Maryland

Products - Commercial Attractions

Strategy 1) Explore the development of family-oriented commercial attractions

Virginia contains a number of family-oriented attractions such as Busch Gardens, Kings Dominion, WaterCountry USA, the Virginia Aquarium, and others. Additional opportunities to add new family-oriented attractions, which complement the destination mix and add to visitor appeal, should continue to be explored.

Actions:

- Explore creating a cluster of commercial attractions with a family-friendly theme that offers distinctive experiences, such as themed entertainment, children's museums, adventure parks, theme parks, skate parks, and others that serve visitors and residents to enhance visitor experiences
- Continue to leverage existing assets and incorporate kid-friendly features and activities at attractions, including incorporation of the outdoors (water features, animals, etc.), scavenger hunts, kid-oriented events and competitions at festivals, designated playground areas and hands-on and interactive exhibits, adventure activities with scale appropriate for kids (zorbing, zip lining, ropes courses, etc.), family activities at wineries, and family music and arts classes among other activities
- Continue to incorporate children-oriented elements at events and festivals
- Explore improvement in attractions and lodging to better accommodate larger travel groups, such as multi-generational travel

Potential Success Factors:

- Significant developments may involve support from government, businesses, community organizations, and residents
- As part of a community's economic development strategy, direct investment may be required in developing commercial attractions, and incentive programs should be explored. If appropriate, public/private partnerships should also be considered to ensure development.

Priority/Timing: Medium

Key Stakeholder Roles: Local Govt - Planning/Eco Development, Private Businesses (Developers/Attraction Management), DMOs, VTC, VEDP, Virginia Dept of Business Assistance

Potential Measures of Success:

- Number of family-oriented experiences planned and developed
- Number of kid-friendly improvements to existing attractions

Example Destinations:

- Virginia: Clemyjontri Park, Fairfax County
- National: Lancaster County, Pennsylvania
 - Lancaster County is known for its Pennsylvania Amish community
 - While in Amish Country, visitors can learn about the Amish culture via Amish homesteads and villages, buggy rides, mud sales, quilt shops, Pennsylvania Dutch dining, roadsides stands, and farmers' markets
 - Schoolhouse, Amish home, and barn tours are also available to learn more about the Amish lifestyle
 - To broaden its appeal for families, Dutch Wonderland, a family amusement park with over 30 rides, is located within the area, and Hersheypark, which includes rides, a waterpark, and zoo is located within 30 minutes

-
- During the development process, promotions to potential visitors as well as residents of coming attractions should be advertised
 - Supporting visitor amenities developed near proposed commercial attractions, such as accommodations, dining, retail, and other entertainment, is also encouraged

Products - Commercial Attractions

Strategy 2) Explore the development of commercial attractions designed for a higher-end, luxury market

Virginia's natural beauty combined with upscale elements such as wine and equestrian position it well for higher-end/luxury attractions that add to the visitor experience and destination appeal, as evidenced through current elements such as Keswick Hall in Charlottesville, Jefferson Hotel in Richmond, Morrison House Hotel in Alexandria, Homestead in Bath County, and Primland in Patrick County. In addition, the new Salamander Resort under construction in Middleburg is expected to add to the luxury offerings in Virginia as a five-star resort with meeting, spa, and equestrian facilities.

Actions:

- Explore development and enhancement of higher-end/luxury-oriented attractions, such as destination spas, resorts, and golf courses in strategic locations
- Seek opportunities to expand, leverage, and **further promote Virginia's Golf Trail**
- Include higher-end experiential elements such as personal guides, yacht rentals, making own wine, personal chef culinary classes, and other features

Potential Success Factors:

- Developing distinctive higher-end experiences and promoting these to key target markets
- As part of a community's economic development strategy, direct investment may be required in developing commercial attractions, and incentive programs should be explored. If appropriate, public/private partnerships should also be considered to ensure development.

Priority/Timing: Medium

Key Stakeholder Roles: Local Govt - Planning/Eco Development, Private Businesses, DMOs, VTC, VEDP, Virginia Dept of Business Assistance

Potential Measures of Success:

- Number of higher-end/luxury developments planned and completed
- Number of higher-end/luxury experiential offerings increased

Example Destinations:

- Virginia: Keswick Hall, Charlottesville
- National: Arizona
 - Arizona has emerged as a popular destination for affluent travelers as it offers a number of luxury resorts, many of which feature high-end spas and golf courses
 - Scottsdale features five AAA Five-Diamond hotels
 - **Arizona's luxury spas are frequently featured in publications such as *Conde Nast Traveler* and *Travel + Leisure***
 - Top golf courses that appeal to the luxury market include the Grayhawk Golf Club, Troon North, and TPC Scottsdale

Products - Commercial Attractions

Strategy 3) Maintain and explore expansion of cruise tourism

Cruise tourism refers to traditional cruise ships as well as day-cruises. Cruises from Norfolk sail to the Bahamas and offer "cruises to nowhere" out to sea through Carnival lines. Norfolk also serves as a port of call. Harbor cruises also provide shorter-term experiences. Opportunities to expand upon this current business with the potential to garner market share from competitive ports such as Baltimore.

New EPA rules requiring lower sulphur fuel starting in 2015 may impact cruise business in Norfolk and other cruise ports. The new regulations will increase cruise company costs, potentially affect the number of cruises from Norfolk or other nearby ports such as Baltimore. At this time, Carnival continues to market Norfolk itineraries for 2013.

Actions:

- Work with cruise companies to ensure service offerings are maintained and explore the potential for expanded service, additional stops for port of call, "cruises to nowhere," and smaller scale ship rentals
- Continue to enhance destination elements related to tours, activities, entertainment, hotels, dining, shopping, accommodations, and transportation to strengthen appeal for cruise visitors and encourage longer stays in home port
- Explore expansion of yachting and sailing cruises in addition to traditional large-scale cruises as a means to further leverage Virginia's natural coastline and outdoor assets

Potential Success Factors:

- Cooperation with cruise companies will be critical to success in expanding cruise tourism
- Incentives to encourage ancillary destination development
- Continued promotions to key target markets
- Evaluation of Baltimore's cruise business to gauge the potential for greater market share in the Mid-Atlantic region

Priority/Timing: Medium

Key Stakeholder Roles: Local Govt - Eco Development, DMOs, Virginia Port Authority, Private Businesses (cruise, yacht companies), VEDP, Virginia Dept of Business Assistance

Potential Measures of Success:

- Number of cruise experiences added, including overnight and day cruises
- Number of ancillary destination improvements for cruise passengers

Example Destinations:

- Virginia: Norfolk
- National: Port of Baltimore
 - A new cruise terminal at the Port of Baltimore in downtown Baltimore was opened in 2006 to increase capacity and improve the facilities, and now offers year-round departures
 - In 2011, a record-breaking 252,000 people sailed on 105 cruises from Baltimore
 - **Baltimore's cruise terminal also appeals to non-local travelers who have convenient transportation access to the terminal by air or highway and numerous hotel options in the downtown district. The cruise terminal's location allows visitors to lengthen their vacation to enjoy the famous Inner Harbor area and other nearby attractions.**

Objective 10: Events which leverage Virginia's tourism assets are created and expanded

Events have the opportunity to be significant tourism lures in and of themselves and have the ability to reinforce visitors themes, lures, and attractions. Events can help to raise the profile of visitor themes and emerging markets, where the success of events may lead to greater destination and attraction recognition and spark new tourism product development. Events also add to the depth of the visitor experience, while highlighting the authentic natural, historical, and cultural strengths of the Commonwealth. Events may also bring together multiple visitor themes, where for example, heritage may be connected to outdoors, arts, music, and culinary assets. Events also have the ability to extend traditional visitor seasons/off-set low visitor seasons. Virginia should continue to use and leverage events for these purposes, while developing signature events and distinctive experiences for visitors and residents. Events may include festivals, fairs, concerts, performances, tournaments/races (running, biking, swimming, kayaking, rowing, boating/sailing, fishing, etc.), sporting events, exhibitions, and meetings. The events strategy presented may be more applicable in certain areas of Virginia than others depending on the tourism lures and existing events offered in various locations.

The matrix below is a summary of the strategies and the pages that follow provide a detailed description of each strategy. In regards to the priority/timing, red indicates a high priority.

Strategy	Priority/ Timing	Key Stakeholder Roles	Potential Measures of Success	Comparable Case Study
Enhance and develop events which promote the key visitor themes	●	DMOs, Event Organizers, Associations, Non-Profit Organizations, Chambers of Commerce, Local Govt, Attraction Management, Private Businesses, VTC, and other community organizations	Number of events developed or expanded Number of events that incorporate multiple visitor themes Increase in event attendance	Gasparilla Pirate Festival, Tampa

Products - Events

Strategy) Enhance and develop events which promote the key visitor themes

Events and festivals have the opportunity to serve as primary drivers for visitors, add to the visitor experience, highlight the authentic natural, historical, and cultural strengths of Virginia, and reinforce and connect key visitor themes. A multitude of events and festivals occur throughout the year in Virginia, ranging from Floyd Fest to the International Gold Cup Races. Opportunities to create and attract distinctive events and improve existing events should be pursued, including those that attract off-season visitors. Communities are encouraged to coordinate, so that similar events are not replicated and communities can work together to create signature events for a region.

Actions:

- Enhance and develop events which promote key visitor themes, such as towns, history/heritage, nature/outdoors, sports, culinary, arts & music, and industries of Virginia, and those which leverage unique assets of its localities and regions
- Establish signature events that are unique and embody the local culture, while attracting a broad audience. These should be recognized as signature events not only for Virginia, but also on a national/international scale. New events, for example, may leverage Virginia's battlefield assets to create various culinary or music competitions such as a "Battle of the Bands" event. Event recognition should be built through available channels, including television coverage, PR, and social media.
- Expand events, where possible, to extend the theme and event days and incorporate new activities associated with the event such as additional athletic events, culinary events, parades, and other activities, which may be spread over multiple weekends
- Design events to attract visitors and serve the local community throughout the year and extend traditional visitor seasons
- Plan event timing, theme, and composition to maximize event success in consideration of other events occurring in nearby locations
- Encourage the development and improvement of facilities, grounds, and supporting infrastructure for events

Priority/Timing: High

Key Stakeholder Roles: DMOs, Event Organizers, Associations, Non-Profit Organizations, Chambers of Commerce, Local Govt, Attraction Management, Private Businesses, VTC, and other community organizations

Potential Measures of Success:

- Number of events developed or expanded
- Number of events that incorporate multiple visitor themes
- Increase in event attendance

Example Destinations:

- Virginia: Old Fiddler's Convention, Galax
- National: Gasparilla Pirate Festival, Tampa
 - The annual Gasparilla Pirate Festival in Tampa is a parade celebrating Jose Gaspar, a Spanish nobleman and naval officer who turned to piracy and supposedly operated in Southwest Florida
 - The festival typically attracts more than 300,000 people on both boat and foot. Given its economic impact of almost \$20 million, the festival has expanded from a weekend event to a month-long event, and now includes the Children's Gasparilla Extravaganza, Gasparilla Festival of the Arts, Gasparilla Film Festival, Gasparilla Music Festival, Gasparilla Night Parade, Gasparilla Distance Classic, and Gasparilla Pageant and Fashion Festival

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- Hold events in town/city center locations, where appropriate, allowing them to showcase local cuisine, agriculture, music, arts & crafts, industries in the area, and other areas to support town/city center activity
 - Tie in various types of visitor themes, such as outdoors, history, culinary, wine/beer, arts, music, etc. when possible. Virginia's culinary industry should continue to play a strong role in other themed events including concerts, arts, outdoors, and other events. This includes events, which celebrate culinary heritage such as Brunswick stew, cast iron cook-off, and Chesapeake Bay oysters, and other events which promote the growing craft beer industry, including Craft Beer Month and Oktoberfests.
 - Incorporate kid-friendly elements as part of events, such as arts or athletic competitions

Potential Success Factors:

- Cooperation and collaboration among private businesses and destinations within the region to maximize event success and coordination of event timing
- Promotions to local and regional residents as well as to potential visitor segments that involves a concerted effort among event organizations, DMOs, businesses, local governments, and other relevant parties
- Continuing to build event recognition through available channels, including television coverage, PR, and social media
- Ensure local policies which enable group gatherings
- Exploration of incentives and grants to aid in event development

Outcome 2 – Pillars

The tourism infrastructure of the Commonwealth and supporting elements are improved or developed to enable the success of visitor experiences.

Pillars (Supporting Elements) Objectives

Pillars or supporting elements involve transportation infrastructure, wayfinding, workforce training, and research, which serve to support tourism growth and industry success. The objectives for these supporting elements are defined as follows:

Objective 1: Strategies to improve transportation are developed and executed

Objective 2: Visitor wayfinding is improved

Objective 3: Tourism education and training programs are continued and enhanced

Objective 4: Tourism research is available which supports tourism development and marketing initiatives

Objective 1: Strategies to improve transportation are developed and executed

Transportation is a fundamental support element for visitors' ability to access destinations and travel within destinations, which directly impacts the visitor experience. While Virginia has connectivity with its commercial airports, interstates, rail, Metro, and other public access, improvements are needed. Stakeholders cited the lack of quality transportation systems as one of the state's top challenges for tourism. Improved transportation is needed to alleviate congestion in certain areas to help ensure tourism growth. Given the role of transportation in tourism, it is important that the tourism industry is involved in and represented in transportation decisions with substantial tourism **implications, such as those contained in VDOT's Virginia Surface Transportation Plan 2035** and other transportation projects. Put simply, it is critical that tourism stakeholders are "at the table" related to transportation developments and influence the direction of transportation developments to positively impact tourism.

The matrix below is a summary of the strategies and the pages that follow provide a detailed description of each strategy. In regards to the priority/timing, red indicates a high priority and blue indicates a medium priority.

Strategy	Priority/ Timing	Key Stakeholder Roles	Potential Measures of Success	Comparable Case Study
Initiate concerted strategy to improve road transportation for tourism	●	VDOT, DMOs, Local Govt, PDCs, VTC, VHTA, Virginia Chamber	Number of transportation initiatives evaluated Number of transportation projects started, under-construction, and completed Number of transportation initiatives with involvement from tourism stakeholders Increase in promotion of mass transit and usage	Honolulu, Hawaii
Explore increased air access, rail, and mass transit for strategic locations	●	VA Dept of Aviation, VA Dept of Rail and Public Transportation, DMOs, Local Govt, PDCs, VTC, VDOT, AMTRAK, Virginia Chamber	Number of transportation initiatives evaluated Number of transportation projects started, under-construction, and completed Number of transportation initiatives with involvement from tourism stakeholders Increase in promotion of mass transit and usage	Charleston, South Carolina

Pillars - Transportation

Strategy 1) Initiate concerted strategy to improve road transportation for tourism

Road transportation is critical to tourism and in certain areas, including Northern Virginia and Hampton Roads, it may be an inhibitor to future tourism growth. As such, it is important for the tourism industry to be involved in addressing solutions to improve this challenge and other transportation initiatives which may impact tourism. Examples include toll roads such as the proposed toll road along a portion of Interstate 95 connecting Southern Virginia and Central Virginia which may impact tourism related to travelers on this route.

Actions:

- Evaluate VDOT's planned strategies (as part of its 2035 plan) for road transportation improvements with significant potential impact on tourism. These involve expressway development, tunnel development, widening of highways, adding HOV lanes, adding truck climbing lanes in mountainous areas, and adding shoulders for bicycles.
- Accelerate road improvements, to the extent possible, which alleviate congestion and increase accessibility
- Evaluate the impact of transportation improvements and work to manage and mitigate their resulting effects
- Incorporate alternative transportation options as part of a comprehensive road transportation strategy that alleviates congestion and provides various options for visitors. These may include mass transit options such as rail, light rail, and ferry alternatives (described further in the following strategy, Strategy 2) as well as other green transportation initiatives for eco-friendly personal mobility. These other transportation options should be well promoted and communicated to visitors as well as residents.
- Execute long-term plan strategies

Potential Success Factors:

- Collaboration among VDOT, VTC, VHTA, Virginia Chamber, PDCs, local governments, and others in the tourism community in the development of transportation plans

Priority/Timing: High

Key Stakeholder Roles: VDOT, DMOs, Local Govt, PDCs, VTC, VHTA, Virginia Chamber

Potential Measures of Success:

- Number of transportation initiatives evaluated
- Number of transportation projects started, under-construction, and completed
- Number of transportation initiatives with involvement from tourism stakeholders
- Increase in promotion of mass transit and usage

Example Destinations:

- National: Honolulu, Hawaii
 - Honolulu was recently announced as the most traffic congested city in the annual National Traffic Scorecard by INRIX
 - With Hawaii's significant dependence on tourism, alleviating this congestion became critical. A 20-mile high-capacity rail project is under construction. The rail will connect passengers from Kapolei to downtown in roughly 45 minutes and serve Waipahu, Pearl Harbor, and the airport.
 - Honolulu expects the rail to serve 116,300 passengers on a daily basis by 2030. The \$5.3 billion project was approved for construction in 2008. The first segment is expected to be completed in 2015, with an additional extension in 2017, and the full line completed in 2019.

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- Study of potential impacts on tourism visitation from new transportation developments
 - Planning to adjust to changes in traffic flows resulting from transportation changes and improvements
 - Information visibility on transportation options and alternatives until construction projects are completed

Pillars - Transportation

Strategy 2) Explore increased air access, rail, and mass transit for strategic locations

In addition to road transportation, accessibility by air, rail, and other forms will continue to be important as methods for not only getting visitors to Virginia, but also connecting destinations and aiding in traffic alleviation.

Actions:

- Work with airline companies to evaluate the demand for and secure additional routes and/or frequency to Virginia locations, particularly as it relates to routes from key origin markets. Incentives for retaining service should be explored, which is emphasized further by the recent loss of AirTran service, for example, at the Newport News Williamsburg International Airport.
- Similarly, work with rail companies such as Amtrak and Virginia Railway Express to study the demand for and secure additional routes and/or frequency to Virginia locations. Extensions, for example, such as the recently announced extension of rail access extending to Norfolk and connecting to the Northeast Corridor should continue.
- Explore alternatives related to mass transit improvement such as high-speed rail, Metro, and light rail in strategic locations
- Complete current projects such as the Silver Line Metro extension to Dulles International Airport. This is anticipated to be a considerable benefit, alleviating traffic for visitors and Virginia and D.C. residents, and serve as a convenient connection to the airport. High speed or light rail options should be explored as ways to ease up congestion.
- Evaluate the need for improved visitor infrastructure at key rail and mass transit stations for access to rental cars, hotel shuttles, taxis, and other amenities and explore incentives, which encourage the establishment of these on-site station options
- Include mass transit options that allow for greater connectivity within town/city centers and to/from attractions, such as trolleys, shuttle services, etc. These should connect popular visitor attractions, main parking areas, airports, and rail stations as well as connectivity among the town/city center.
- Explore opportunities for additional ferry services to connect parts of the state similar to

Priority/Timing: Medium

Key Stakeholder Roles: VA Dept of Aviation, VA Dept of Rail and Public Transportation, DMOs, Local Govt, PDCs, VTC, VDOT, AMTRAK, Virginia Chamber

Potential Measures of Success:

- Number of transportation initiatives evaluated
- Number of transportation projects started, under-construction, and completed
- Number of transportation initiatives with involvement from tourism stakeholders
- Increase in promotion of mass transit and usage

Example Destinations:

- National: Charleston, South Carolina
 - Charleston was successful in luring JetBlue Airways to Charleston International Airport after two and a half years of discussions
 - Starting in February 2013, JetBlue will offer two nonstop, daily flights to New York's John F. Kennedy International Airport and one nonstop, daily flight to Boston's Logan International Airport
 - The Charleston Area Convention and Visitors Bureau, the Charleston County Aviation Authority, and the Charleston Metro Chamber of Commerce all provided incentives

the Elizabeth River Ferry that connects Norfolk and Portsmouth

- Ensure mass transit options for rail, light rail, ferry, etc. are well promoted and communicated to visitors as well as residents

Potential Success Factors:

- Collaboration and communication among destinations, rail companies, and airline companies
- Study of potential impacts on tourism visitation from new transportation developments
- Exploration of investment and public/private partnership for the development of additional transportation options
- Promotions, as needed, with residents as to the benefits of transportation improvements

Objective 2: Visitor wayfinding is improved

Wayfinding is another fundamental element of the visitor experience, and it affects the ability for visitors to connect to attractions and destinations. Navigation within and between destinations should be seamless for visitors, aided through signage, maps, electronic channels, community sense of place, and other means in a convenient manner.

The matrix below is a summary of the strategies and the pages that follow provide a detailed description of each strategy. In regards to the priority/timing, red indicates a high priority and blue indicates a medium priority.

Strategy	Priority/ Timing	Key Stakeholder Roles	Potential Measures of Success	Comparable Case Study
Ensure signage and visitor information is visible and available through multiple points	●	VDOT, Local Govt, DMOs, Chambers of Commerce, Hospitality Associations, Attraction Management, Private Businesses	Evaluation and revision of signage procedures Ongoing communication with VDOT Identification of local advocates and liaisons for signage Number of signage improvements Number of visitor information outlets created and enhanced Number of site/apps developed and enhanced Number of mapping enhancements and developments	Alliance, Nebraska
Reinforce community sense of place	●	Local Govt - Planning/Economic Dev, DMOs, Chambers of Commerce, Hospitality Associations, Private Businesses	Number of community improvement initiatives contributing to sense of place Number of signage improvements	Worcester, Massachusetts

			Development of community guidelines Increase in visitor and resident satisfaction	
Invest in technology infrastructure (Wi-Fi, cell reception, GPS, etc.)	●	Local Govt - Economic Dev, VEDP, PDCs, DMOs, VTC	Number of technology infrastructure improvements completed	Lawrence-Douglas County, Kansas

Pillars - Wayfinding

Strategy 1) Ensure signage and visitor information is visible and available through multiple points

Signage was one of the most frequently cited issues among stakeholders. VDOT has signage programs through Virginia Logos, including the Travel Services Signs, Tourist-Oriented Directional Signs or TODs, Supplemental Guide Signs, General Motorist Services Signs, and Integrated Directional Signage Programs (Civil War Trails, DGIF Wildlife Trails, Waterways, Scenic Rivers, and Winery). However, availability of signage and the ability to obtain signage through VDOT in an affordable and convenient manner are areas of concern among stakeholders, which should be addressed by the industry.

Actions:

- Ensure requests to VDOT (and its contractor) are handled in a timely manner that does not impede visitor promotions or tourism development. This may include identifying advocates or liaisons that may assist communities with signage program implementation, additions, and replacement.
- Evaluate the fee structure and costs of fabrication, installation, maintenance, and replacement to ensure affordable options are available to businesses and communities and seek revisions to the program
- Explore the development of a comprehensive wayfinding master plan for the state
- With improvement to signage programs, continue to make informational and directional signage highly visible on interstate highways, state roads, and within destinations. Signage includes notice of attractions (e.g. trails, parks, wineries, historical sites, etc.), connection to scenic byways and roads, and visitor amenities, including welcome centers, accommodations, dining, shopping, etc. Trail signage, whether for driving or active recreation trails, should be well marked.
- Continue to provide visitor information through centralized locations such as a kiosks, visitor centers, hotels, and businesses which can be visible sources of visitor information, maps, and customer service
- Continue to make wayfinding information available from hardcopy maps as well as

Priority/Timing: High

Key Stakeholder Roles: VDOT, Local Govt, DMOs, Chambers of Commerce, Hospitality Associations, Attraction Management, Private Businesses

Potential Measures of Success:

- Evaluation and revision of signage procedures
- Ongoing communication with VDOT
- Identification of local advocates and liaisons for signage
- Number of signage improvements
- Number of visitor information outlets created and enhanced
- Number of site/apps developed and enhanced
- Number of mapping enhancements and developments

Example Destinations:

- National: Alliance, Nebraska
 - Alliance, Nebraska recently implemented a new wayfinding program, which included 14 new signs and plans to further expand the program by adding 22 more signs in surrounding areas
 - The program was created through a partnership between Nebraska Department of Roads, City of Alliance, Alliance City Council, Alliance Tourism Task Force, attractions of Alliance, and volunteers and neighbors from the community

electronic channels on destination sites, travel sites, attraction sites, accommodation sites, mobile applications, and GPS. Websites also need to be easily usable from mobile devices.

Potential Success Factors:

- Commitment from local advocates or liaisons which can work with communities to ensure signage improvements are executed
- Cooperation and communication among local governments, VDOT, other state government departments, and the business community
- Cooperation and communication among tourism stakeholders to ensure availability of visitor information

Pillars - Wayfinding

Strategy 2) Reinforce community sense of place

Sense of place refers to the traits of a destination which define its aesthetic and appeal. A greater sense of place contributes to the ease of visitor wayfinding and overall visitor experience. This sense of place begins with a sense of arrival to a destination from the visitor perspective, which helps visitors become oriented with a destination. Communities in Virginia should seek opportunities to further define their destination through reinforcing sense of place.

Actions:

- Enhance visitor wayfinding through further creating community sense of place by using signage, landscaping, distinct community icons, art, architectural design, and other aesthetics. These elements should be coordinated to build a cohesive destination. Town/city names on signage, landscaping, icons, etc. may be placed throughout the destination, but key entry points provide the opportunity to create distinctive gateways to communities for a greater sense of arrival.
- Explore the development of community guidelines for improvement and redevelopment efforts to create cohesive elements which define destination sense of place

Potential Success Factors:

- Approach from a community improvement perspective with collaboration, involvement and support from government, DMOs, attractions, businesses, community organizations, and residents
- Incentive programs to encourage private sector investment and cooperation in addition to direct public investment
- Exploration of and use of available investment and incentive programs from state and national resources on a public and private basis such as DHCD, Virginia Commission for the Arts, VDOT, Virginia Tech Community Design Assistance Center, and others
- Efforts for community sense of place tied to branding and image, including use of distinctive and iconic features for the destination

Priority/Timing: Medium

Key Stakeholder Roles: Local Govt - Planning/Economic Dev, DMOs, Chambers of Commerce, Hospitality Associations, Private Businesses

Potential Measures of Success:

- Number of community improvement initiatives contributing to sense of place
- Number of signage improvements
- Development of community guidelines
- Increase in visitor and resident satisfaction

Example Destinations:

- National: Worcester, Massachusetts
 - Worcester is currently fund-raising to implement the \$3 million Worcester Wayfinding Project
 - The project is being developed by a public-private partnership between the City of Worcester and its businesses, higher education, and cultural communities with the goal of establishing a comprehensive identification and wayfinding system that creates a strong identity for City, for districts, for destinations, while using signature landmarks and gateways, providing consistent sign design, and telling Worcester's unique story
 - The project is intended to provide a distinctive sense of arrival for visitors, reinforce pedestrian and vehicular wayfinding paths, and enhance sense of place unique to Worcester

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- Flexibility in guidelines to allow for distinctive aesthetics and not be overly restrictive, discouraging development
 - Input on guidelines sought from the community, including residents and business owners

Pillars - Wayfinding

Strategy 3) Invest in technology infrastructure (Wi-Fi, cell reception, GPS, etc.)

Improvements in technology infrastructure also contribute to easing visitor wayfinding as technology has become an increasingly important tool to aid travelers in navigation and information on destinations. Ensure technology infrastructure not only assists with wayfinding, but affects visitors' overall experience and destination impression.

Actions:

- Ensure technology elements, including cell reception, Wi-Fi availability, GPS recognition, fiber optics, etc. are available in strategic locations for the benefit of both visitors and residents. In more rural areas of the state, greater investment in these areas may be required. Although visitors may be seeking rural retreats in these areas, there are fundamental technologies which visitors have come to expect and demand in destinations. It is also recognized that varying terrain issues may also impact the level of technology investment possible in certain destinations.
- Ensure destination, travel, attraction, and accommodation sites are easily navigable using mobile devices

Potential Success Factors:

- Incentive programs to encourage private sector investment in addition to direct public investment
- Collaboration among public sector and tourism industry stakeholders in planning for technology investment in strategic locations

Priority/Timing: Medium

Key Stakeholder Roles: Local Govt - Economic Dev, VEDP, PDCs, DMOs, VTC

Potential Measures of Success:

- Number of technology infrastructure improvements completed

Example Destinations:

- National: Lawrence-Douglas County, Kansas
 - Local, state, and federal representatives in the Lawrence-Douglas County area are exploring ways to use technology to improve the efficiency and safety of roads, public transit, and emergency services by creating an Intelligent Transportation System (ITS), which is an application of technologies and communications intended to improve roadways and transit systems, and includes detection systems and cameras for monitoring traffic conditions on roadways, dynamic message signs to provide real time travel information, and vehicle location systems to track transit and emergency service vehicles
 - The four key areas include traffic management and traveler information projects; maintenance and construction management projects; emergency management projects; and public transportation management projects

Objective 3: Tourism education and training programs are continued and enhanced

An educated tourism workforce is a critical element to sustain and grow Virginia's tourism industry. Virginia has invested in training and education for entrepreneurs, front-line employees, communities, and tourism professionals. VTC's Partnership Marketing offers tourism planning, marketing, and development assistance for communities and businesses, customer service training, and support for numerous programs for entrepreneurs, agri-tourism businesses, and tourism businesses. The Virginia Hospitality & Travel Association supports educational opportunities for students as well as food and drink service programs. The Virginia Association of Convention and Visitors Bureaus provides destination marketing professional development and certification. In addition, some local destination marketing organizations are also involved in tourism training programs for the workforce in their communities. Stakeholders continue to recognize the need for additional training to ensure a competent workforce. The tourism industry workforce, including frontline employees, tourism professionals, and students, should continue to be trained and educated to build tourism industry capacity.

The matrix below is a summary of the strategies and the pages that follow provide a detailed description of each strategy. In regards to the priority/timing, red indicates a high priority and blue indicates a medium priority.

Strategy	Priority/ Timing	Key Stakeholder Roles	Potential Measures of Success	Comparable Case Study
Enhance training and education of tourism workforce	●	VHTA, VACVB, VTC, Virginia Chamber, DMOs, Hospitality Associations	Evaluation and completion of tourism education and training plan Establishment of statewide certification program for customer service training Evaluation of tourism provider certification program Number of tourism certifications completed Number of completed courses/programs by tourism professionals Number of new Partnership Marketing field representatives added	Oregon Q Cares

<p>Ensure tourism education programs are continued for students</p>		<p>Govt/Educational Institutions, DMOs, VTC, VHTA, Virginia Chamber, Hospitality Associations</p>	<p>Number of academic courses and programs offered Number of students completing academic programs</p>	<p>Academy of Hospitality & Tourism, Florida</p>
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Pillars - Education & Training

Strategy 1) Enhance training and education of tourism workforce

With the breadth of the tourism industry, the workforce supporting the industry covers a variety of areas, including those that develop, market, and execute the visitor experience. This includes DMO professionals, attractions management, hoteliers, tourism entrepreneurs, tour guides, and front-line employees at restaurants, retail establishments, cab drivers, rental car agencies, gas stations, attractions, and others.

Stakeholders cited the need for additional customer service training to ensure that visitors feel welcome and that frontline employees are able to answer questions regarding local tourism assets and informally promote destinations. Stakeholders also seek additional assistance for further support of the tourism industry organizations.

Actions:

- Evaluate the tourism workforce needs across the state and develop a cohesive plan for public- and private-sector tourism leadership to improve tourism education and training
- Develop a statewide program which certifies businesses for completing tourism training of frontline employees. This not only enhances the workforce, but also reinforces industry pride. While a certification program is developed, existing training and education programs for frontline employees should be continued. Examples of current customer service training **programs include VTC's Partnership Marketing Customer Service Training and other** programs offered by local DMOs, including Martinsville and Virginia Beach.
- Continue training and education for tourism marketing professionals through workshops, education, and assistance. This includes the Virginia Destination Professional certification by Virginia Association of Convention and Visitors Bureaus, VHTA's workshop series for industry professionals, and VTC's Partnership Marketing assistance efforts.
- Encourage professionals to participate in programs offered through Destination Marketing Association International (DMAI) to continue to build capacity. These include the Certified Destination Management Executive, Professional Destination Management certification, Destination Pro, sales and marketing training, and other on-line education programs. In

Priority/Timing: High

Key Stakeholder Roles: VHTA, VACVB, VTC, Virginia Chamber, DMOs, Hospitality Associations

Potential Measures of Success:

- Evaluation and completion of tourism education and training plan
- Establishment of statewide certification program for customer service training
- Evaluation of tourism provider certification program
- Number of tourism certifications completed
- Number of completed courses/programs by tourism professionals
- Number of new Partnership Marketing field representatives added

Example Destinations:

- National: Oregon Q Cares
 - Q Cares is Oregon's statewide customer service training certification program created to support the development of the Tourism & Hospitality Industry through enhanced guest experiences
 - It provides standardized customer service training, emphasizes the importance of quality customer service, and equips employees with the tools and resources needed to better serve visitors
 - The free web-based certification can be taken by anyone wishing to improve customer service skills and is recognized by employers throughout the state

addition, DMAI offers its accreditation program for destination marketing organizations ensuring that DMOs meet overall professional standards.

- Explore the development of a certification program for tourism providers across the state similar to the Eastern Shore Eco-tour Guide Certification Program offered by the Eastern Shore Community College
- Increase Partnership Marketing staff in the field to cover tourism regions in the state for increased tourism assistance

Potential Success Factors:

- Cooperation and collaboration among tourism businesses, DMOs, and other tourism stakeholders to ensure workforce quality
- Leveraging existing local, state, and national training and education programs, including job training programs in other industries
- Incentive programs to encourage private sector participation and direct public investment
- Continued education to businesses and residents on the importance of tourism to communities

Pillars - Education & Training

Strategy 2) Ensure tourism education programs are continued for students

To build the future workforce for tourism in Virginia, student education programs should be continued. Associates programs, for example, are available from Virginia Highlands Community College, National College, and Northern Virginia Community College. The VHTA also offers a number of higher education scholarships, which help to incentivize growth in this field. In addition, other collegiate programs such the Hospitality & Management Program at Virginia Tech, Recreation and Tourism studies offered at Old Dominion, and Hospitality & Tourism Management program at James Madison University should also continue and be leveraged to raise the profile of tourism for the state.

Actions:

- Continue academic programs related to tourism, hospitality, and recreation at the high school and community college levels to support the workforce and business development within the tourism industry in Virginia. Tourism industry professionals are also encouraged to be involved in the development, instruction, and promotion of these programs.

Potential Success Factors:

- Cooperation and collaboration among tourism industry stakeholders and educational systems/institutions
- Continued education to government officials on the importance of tourism to the economy and job opportunities

Priority/Timing: Medium

Key Stakeholder Roles: Govt/Educational Institutions, DMOs, VTC, VHTA, Virginia Chamber, Hospitality Associations

Potential Measures of Success:

- Number of academic courses and programs offered
- Number of students completing academic programs

Example Destinations:

- National: Academy of Hospitality & Tourism, Florida
 - The National Academy Foundation is an educational program for high school students that includes industry-focused curricula, work-based learning experiences, and business partner expertise in five themes, including Hospitality & Tourism
 - In addition to studying career-focused curriculum and working on collaborative projects, the Academy of Hospitality & Tourism students gain critical career knowledge through a series of work-based learning experiences both inside and outside of the classroom, including job shadowing, mock interviews, resume writing workshops, and a compensated internship
 - Over 20 of the academies are located in Florida, which also offers many tourism education programs in community colleges and **universities**

Objective 4: Tourism research is available which supports tourism development and marketing initiatives

Virginia has invested in tourism research which serves as a critical cornerstone for tourism initiatives and provides communities with important information about visitors to assist in making decisions regarding tourism product development, marketing, infrastructure, funding, partnerships, policies, and other industry strategies. Research also plays a vital role in providing evidence **regarding the tourism industry’s size, importance, and benefits to communities, which can be communicated to government leaders.**

From a state level perspective, VTC has developed visitor profile data showing what type of travelers are visiting Virginia, where they are coming from, where they are staying, and what activities they are doing by season, region, and visitor interest. Traveler attitude studies also illustrate traveler perceptions and interests, while performance trends are available regarding international visitation, hotels, visitor spending and economic impacts, and others. Tourism performance indications are also available through lodging reports. The VTC also provides detail regarding the economic benefit in terms of visitor spending, employment, and tax receipts for communities from travel and tourism. At the destination level, communities also continue to invest in research specific to their destinations to remain competitive. Research is an area of on-going importance for Virginia's tourism industry and research efforts should be continued to support critical decisions.

The matrix below is a summary of the strategy for research and the pages that follow provide a detailed description of the strategy. In regards to the priority/timing, red indicates a high priority.

Strategy	Priority/ Timing	Key Stakeholder Roles	Potential Measures of Success	Comparable Case Study
Continue to engage in or obtain research on visitors	●	DMOs (local, regional, state), VTC, VHTA, Local Govt, Chambers of Commerce, Hospitality Associations	Number of tourism research items developed or updated Number of education sessions, communications, or materials provided on tourism research Completion of research outreach campaign	Visit California

Pillars - Research

Strategy) Continue to engage in or obtain research on visitors

Research is an area of on-going importance which should be continued in an effort to support critical decisions. Research should be conducted regularly to ensure the most recent and relevant information is available to anticipate visitor demands as well as to support the value of tourism. This second point is of critical importance to continue to show the benefits of tourism to garner support from government, businesses, and residents for tourism initiatives and for continued investment in the tourism industry.

Actions:

- Continue to conduct **research illustrating the economic benefits of tourism on Virginia's** communities, which can be easily conveyed to government leaders, businesses, and residents. Additional research showing social benefits of tourism, community improvement, and impacts on resident quality of life, which helps to further support the **importance of tourism to Virginia's communities and provide additional insights for** government leaders, should be explored.
- Continue to conduct research on past and potential visitors related to characteristics, preferences, activities, level of satisfaction, travel behaviors, cross-visitation, and other pertinent information important for tourism marketing and product development decisions
- Conduct visitor research related to target markets (existing and new) and messaging for these markets. Target markets may include key domestic and international markets as well as niche or thematic markets. The effectiveness of promotions to these markets should also be assessed.
- Engage in research which illustrates current industry trends and forecasts
- Engage in research which evaluates competitive destinations and initiatives
- Obtain information on indicators for return on investment related to marketing and promotion efforts
- Continue to estimate other indicators such as visitor volume, hotel occupancy, event attendance, group bookings, etc.

Priority/Timing: High

Key Stakeholder Roles: DMOs (local, regional, state), VTC, VHTA, Local Govt, Chambers of Commerce, Hospitality Associations

Potential Measures of Success:

- Number of tourism research items developed or updated
- Number of education sessions, communications, or materials provided on tourism research
- Completion of research outreach campaign

Example Destinations:

- National: Visit California
 - Visit California invests in understanding the economic impact of tourism and its domestic and international visitor markets
 - Research includes monthly lodging reports, annual international visitor profiles, ad effectiveness ROI reports, research presentations, and a dashboard that monitors trends. The annual Overseas and Mexican Visitors to California report highlights information about international travel to California.
 - The annual Domestic Travel to California report includes trip and travel behavior and statistics for domestic travelers
 - The Economic Impact of Travel in California report details the statewide and regional travel impact estimates for California

-
- Conduct feasibility studies, as needed and as appropriate, related to new visitor developments and expansions. These new developments should be strategically planned and rooted in research that demonstrates economic and socio-economic benefits and provides support for decision-making.
 - Provide education sessions, communications, and materials, which help to explain research and contributions of tourism. Research outreach campaigns should be established by VTC which help to educate DMOs as well as their local government leaders on methodology and results of research.

Potential Success Factors:

- Coordination with local and regional DMOs, VTC, VHTA, and other associations to understand the type of research sought after by the industry
- Sharing of available data among tourism stakeholders
- Ensuring distinct funding for research is an integral part of tourism marketing and product development

Outcome 3 – Partnerships

Virginia has strong partnerships among industry stakeholders all working toward authentic experiences with collaboration from governmental, private sector, and industry organizations

Partnership Objectives

Partnerships are of critical importance for the industry in order to execute product development, infrastructure, promotions, and policy initiatives. Partnerships not only connect tourism stakeholders, but have the potential to increase connectivity of destinations and attractions. This element is directly within the control of tourism stakeholders to unite and impact change over the next five years.

Objective 1: Organizations to lead tourism initiatives are strengthened or formed

Objective 2: Collaboration among government organizations at the local, state, and federal levels for tourism initiatives is improved

Objective 3: Connectivity among tourism attractions, businesses, and destinations is improved through partnering

Objective 1: Organizations to lead tourism initiatives are strengthened or formed

Industry partnering begins with tourism organizations themselves, and it is important that these organizations have the capacity, funding, and support to serve as tourism leaders for the Commonwealth. Leadership at the local, regional, and state level are critical to ensuring the development and execution of tourism initiatives. These organizations with professionals dedicated to tourism are essential to ensuring tourism industry growth and maturation.

The matrix below is a summary of the strategies and the pages that follow provide a detailed description of each strategy. In regards to the priority/timing, red indicates a high priority.

Strategy	Priority/ Timing	Key Stakeholder Roles	Potential Measures of Success	Comparable Case Study
Create and strengthen tourism organizations	●	DMOs, VTC, Local Govt, Chambers of Commerce, Hospitality Associations, Attraction Management, Private Businesses, VACVB, VHTA	Number of tourism organizations created or expanded Increase in staffing levels for tourism organizations Increase in direct and indirect funding for tourism	Finger Lakes Tourism Alliance

			organizations Number of mentoring relationships established Increase in membership/community participation	
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Partnerships - Tourism Organizations

Strategy) Create and strengthen tourism organizations

Tourism organizations should continue to be created and strengthened to serve as community and industry leaders for tourism. These organizations may include destination marketing organizations, government-formed departments/organizations, tourism authorities, and tourism marketing associations. Tourism organizations should be strengthened at a community level as well as partnering on a regional level to create and improve regional partnerships. Regional partnering (beyond a single town/city/county) is encouraged to pool resources and efforts and develop synergies to increase visitors to a regional area. Building tourism organizations in emerging tourism areas is particularly important to help establish leadership and responsibility for tourism efforts that ultimately aim to increase tourism and its economic contribution to communities.

Actions:

- Create and strengthen tourism organizations focused on tourism promotion and tourism economic development on a local and regional basis to serve as tourism leaders in communities and regions
- Establish a funding mechanism for these organizations as well as human capital support from public and private sectors to lead tourism initiatives in respective localities
- Encourage the development and expansions of regional organizations and alliances, such as the Coastal Virginia Tourism Alliance, Virginia's Retreat, and the emerging Southwest Virginia Region
- Encourage a DMO mentoring program for newly formed and emerging DMOs through program established by the Virginia Association of Convention & Visitor Bureaus
- Continue to encourage membership and participation from tourism industry stakeholders and businesses in communities

Potential Success Factors:

- Collaboration among tourism organizations and local and state government organizations, attraction management, private businesses, and other tourism stakeholders

Priority/Timing: High

Key Stakeholder Roles: DMOs, VTC, Local Govt, Chambers of Commerce, Hospitality Associations, Attraction Management, Private Businesses, VACVB, VHTA

Potential Measures of Success:

- Number of tourism organizations created or expanded
- Increase in staffing levels for tourism organizations
- Increase in direct and indirect funding for tourism organizations
- Number of mentoring relationships established
- Increase in membership/community participation

Example Destinations:

- National: Finger Lakes Tourism Alliance
 - The Finger Lakes Tourism Alliance is an association of private sector attractions, tourism related businesses, and participating county tourism offices working together to enhance and promote visitor businesses for the 9,000 square mile Finger Lakes region in a rural portion of New York State
 - The organization is responsible for promoting the region which includes maintaining the regional tourism website and social media sites, creating travel guides and maps, conducting research, and organizing events and other programs that promote the region

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- Industry-focused professional staff
 - Organization staff dedicated to tourism promotion and development
 - Enabling policies which allow for funding sources and sufficient funding levels to be competitive

Objective 2: Collaboration among government organizations at the local, state, and federal levels for tourism initiatives is improved

With a number of organizations directly and indirectly involved in tourism at the local, state, and national level, government collaboration, cooperation, and coordination related to tourism is critical. It is important for government departments at various levels to communicate and collaborate on tourism related initiatives to ensure the most effective use of resources while achieving synergies.

The matrix below is a summary of the strategy and the pages that follow provide a detailed description of the strategy. In regards to the priority/timing, red indicates a high priority.

Strategy	Priority/ Timing	Key Stakeholder Roles	Potential Measures of Success	Comparable Case Study
Increase communication, planning, and coordination among government entities	●	State Government Departments/Agencies including VTC, Local Govt Departments, Virginia Municipal League, Virginia Association of Counties	Establishment of intra-government planning process Establishment of MOUs among government departments/agencies Initiatives for intra-government communication (calls, meetings, networks, email distributions, etc.) Establishment of a government tourism network	Minnesota Scenic Byways Program

Partnerships - Government

Strategy) Increase communication, planning, and coordination among government entities

While government officials across levels and departments currently work together, increased communication, coordination, and cooperation is an area for improvement between towns and counties, between local government and state government entities, within government departments on a local/state level, and between local/state entities and federal organizations such as the National Park Service, National Forest Service, National Trust for Historic Preservation, etc.

Specifically, for cooperation and communication among government departments at the state or local level, a number of departments and agencies are directly and indirectly involved or impacted by tourism. At the state level, these government organizations include, among others, the Department of Forestry, the Department of Agriculture and Consumer Services, the Department of Housing and Community Development, the Department of Game and Inland Fisheries, the Department of Historic Resources, the Department of Transportation, and the Department of Conservation and Recreation.

Actions:

- Establish guidelines for a cohesive government approach to the tourism industry, involving strategic planning and cooperation among government departments most highly involved in tourism, information sharing and briefings, and others. For example, an MOU encouraged by the Governor between state agencies to adopt and integrate their planning, process, and programs to reinforce the aspects of the State Tourism Plan should be created. Agencies may include VEDP, VDOT, DCR, DHCD, VA Dept of Historic Resources, Dept of Agriculture and Consumer Services, and others deemed appropriate. Similar arrangements should also be explored at a local government level, as appropriate. A partnership audit may be conducted, which helps to identify these government departments.
- Strengthen the regular lines of communication regarding shared tourism initiatives such as promotion, preservation, attraction development, development of itineraries, trails, and others. Communications should occur on a regular basis through established calls and

Priority/Timing: High

Key Stakeholder Roles: State Government
Departments/Agencies including VTC, Local Govt
Departments, Virginia Municipal League, Virginia
Association of Counties

Potential Measures of Success:

- Establishment of intra-government planning process
- Establishment of MOUs among government departments/agencies
- Initiatives for intra-government communication (calls, meetings, networks, email distributions, etc.)
- Establishment of a government tourism network

Example Destinations:

- National: Minnesota Scenic Byways Program
 - In 1992, the Minnesota Department of Transportation, the Minnesota Office of Tourism, the Minnesota Department of Natural Resources, and the Minnesota Historical Society signed a Memorandum of Understanding (MOU) that established the Minnesota Scenic Byways Program
 - The program is designed to establish partnerships with communities, organizations, and government agencies to match resources with grassroots marketing and economic development efforts
 - Currently, there are 21 Minnesota Scenic Byways, eight of which are also designated as National Scenic Byways

meetings, on-line networks with news and calendars, social media, email distributions, and other means.

- Ensure that collaboration on tourism and other economic development initiatives are not discouraged by various jurisdictions, funding, and tax arrangements
- Establish liaisons, where appropriate, to work on an intra-government basis
- Create a network amongst government organizations to ensure communication on issues affecting tourism are shared among key groups

Potential Success Factors:

- Ensuring continuity in tourism communication efforts and planning throughout government administration changes
- Establishing policy which calls for intra-government planning and cooperation
- Commitment to continual communication

Objective 3: Connectivity among tourism attractions, businesses, and destinations is improved through partnering

Through greater partnering among tourism industry stakeholders, destination and attraction connectivity that is intended to improve the visitor experience can also be enhanced. In addition, while tourism destinations and businesses are often in competition with each other, better collaboration among tourism stakeholders has the potential to increase tourism, and these efforts should be encouraged.

The matrix below is a summary of the strategies and the pages that follow provide a detailed description of each strategy. In regards to the priority/timing, red indicates a high priority and blue indicates a medium priority.

Strategy	Priority/ Timing	Key Stakeholder Roles	Potential Measures of Success	Comparable Case Study
Develop and enhance communication and partnering among Virginia tourism industry stakeholders	●	Govt, Private Businesses, Attraction Management, DMOs, Hospitality Associations, Chambers of Commerce, VTC, VACVB, VHTA, Virginia Chamber	Number of partnership assessments conducted Number of joint promotional and development initiatives developed or enhanced (itineraries, packaging, trails, cross-promotional discounts, marketing materials) Number of initiatives for communication developed (committees, calls, meetings, networks, email distributions, etc.) Increase in industry association membership Number of new Partnership Marketing field representatives added	Georgia Agritourism Association
Increase coordination and collaboration among stakeholders that share interests in tourism assets outside of Virginia	●	Govt, Private Businesses, DMOs, Hospitality Associations, Chambers of Commerce, VTC	Number of cross-border alliances formed Number of joint promotional and development initiatives created or enhanced	Journey Through the Hallowed Ground

			Number of initiatives for communication developed (committees, calls, meetings, networks, email distributions, etc.)	
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Partnerships - Connectivity

Strategy 1) Develop and enhance communication and partnering among Virginia tourism industry stakeholders

While public and private stakeholders across the state engage in cooperative efforts through advertising, trails, associations, and other regional efforts, it is a continual area of improvement. Through partnerships, visitor connectivity and experiences may be enhanced. Examples of connectivity include ticket packaging among attractions in the Historic Triangle Area and the Virginia Golf Trail with participation from courses, restaurants, and hotels. Associations such as the Virginia Hospitality and Travel Association, Virginia Wineries Association, Virginia Association of Museums, and others, also play a role in helping to unite industry stakeholders and encourage communication and cooperation.

Actions:

- Conduct partnership audit or assessment within communities and neighboring areas so key stakeholders can be identified to help improve connectivity, authenticity, and visitor experiences. This effort may be led by local/regional DMOs, tourism associations, etc.
- Identify partners in the public and private sector within communities and neighboring **areas for “hub and spoke” opportunities**. Stakeholders should seek to increase cooperation among tourism attractions and businesses through the development of itineraries, packaging, trails, cross-promotional discounts, marketing materials, and other initiatives.
- Increase cooperation among attractions and tourism businesses through associations and professional networks with electronic platforms, social media, conference calls, and meetings to discuss tourism issues and shared concerns. Forums for regular communication and information exchange should be developed to support coordination of tourism initiatives, events, and activities.
- Increase tourism association membership and explore the establishment of new business associations, such as an agri-tourism association, which exist in other states, including Georgia, Tennessee, Vermont, Michigan, Pennsylvania, and others
- Establish a consistent communication plan among key leading industry organizations, including the VTC, VHTA, VACVB, and the Virginia Chamber. This may include quarterly meetings and cross-meeting attendance and board representation.

Priority/Timing: High

Key Stakeholder Roles: Govt, Private Businesses, Attraction Management, DMOs, Hospitality Associations, Chambers of Commerce, VTC, VACVB, VHTA, Virginia Chamber

Potential Measures of Success:

- Number of partnership assessments conducted
- Number of joint promotional and development initiatives developed or enhanced (itineraries, packaging, trails, cross-promotional discounts, marketing materials)
- Number of initiatives for communication developed (committees, calls, meetings, networks, email distributions, etc.)
- Increase in industry association membership
- Number of new Partnership Marketing field representatives added

Example Destinations:

- National: Georgia Agritourism Association (noted on following page)

- Continue outreach of the VTC's Partnership Marketing to assist tourism businesses and entrepreneurs, which helps to connect stakeholders.
- Increase Partnership Marketing staff in the field to cover tourism regions in the state.

Potential Success Factors:

- Strategic planning for promotional efforts
- Formation of formal partnerships for promotional efforts
- Leverage DMO and VTC resources for marketing assistance
- Formation or expansion of industry associations
- Continual communication among industry stakeholders

Example Destinations:

- National: Georgia Agritourism Association
 - **Agriculture and tourism are the state's top two** economic generators. The Association is the official voice of this combination.
 - Its mission through advocacy, education, networking and marketing is to facilitate and create new economic growth opportunities for its members and Georgia through increased agri-tourism and profitable agribusinesses by: enabling, supporting, and promoting **Georgia's** agri-tourism enterprises and educating and informing on the value of agri-tourism.

Partnerships - Connectivity

Strategy 2) Increase coordination and collaboration among stakeholders that share interests in tourism assets outside of Virginia

Virginia is well positioned to leverage tourism assets that spread the borders of Virginia and bordering states and assets just beyond Virginia's borders, through enhanced partnerships and cooperation. These assets may include Blue Ridge Parkway, the Appalachian Trail, the George Washington & Jefferson National Forests, Buggs Island Lake, Assateague Island National Seashore, and others.

Actions:

- Enhance partnerships and cooperation among public and private stakeholders that share interests in tourism assets spanning Virginia's borders through joint promotion programs, environmental initiatives, sharing of research, and other initiatives. Organizations or committees which focus on shared assets should be developed or enhanced. Increased communications through forums such as on-line networks with news and calendars, social media, conference calls, meetings, and other means should be explored to discuss shared concerns. Shared concerns and initiatives may include joint promotion programs and environmental improvement efforts.
- Identify partners with shared interest in **tourism assets to develop and promote “hub and spoke” opportunities. Stakeholders should seek opportunities for itineraries, trails, cross-promotion of attractions, creation of packaging, joint-discounts, co-marketing and other efforts in neighboring states (including Washington D.C.) to leverage tourism assets located near Virginia's borders in other states.**

Potential Success Factors:

- Ensuring mutual benefits of Virginia stakeholders and out-of-state stakeholders
- Policies and programs which enable cross-border partnerships
- Education to government leaders and business community on the importance of cross-border collaboration on tourism
- Continual communication among public and private stakeholders

Priority/Timing: Medium

Key Stakeholder Roles: Govt, Private Businesses, DMOs, Hospitality Associations, Chambers of Commerce, VTC

Potential Measures of Success:

- Number of cross-border alliances formed
- Number of joint promotional and development initiatives created or enhanced
- Number of initiatives for communication developed (committees, calls, meetings, networks, email distributions, etc.)

Example Destinations:

- National: Journey Through the Hallowed Ground
 - The Journey Through the Hallowed Ground Partnership is a four-state partnership created in 2005
 - The non-profit organization is responsible for raising awareness of the American heritage extending from Gettysburg, Pennsylvania, through Maryland and West Virginia, all the way to Monticello in Virginia
 - The Partnerships efforts resulted in the region being designated as a National Heritage Area and Route 15 being recognized as a National Scenic Byway
 - The Partnership also created the JTHG Certified Tourism Ambassador Program and nationally award winning education programs

Outcome 4 – Promotions

Strategic messaging to prospective visitors and industry partners is implemented to increase tourism, economic development, and industry support

Promotion Objectives

Tourism promotions are a fundamental function of the industry to attract visitors to destinations and attractions. Similarly, the appeal of **Virginia’s tourism assets is important to attract tourism economic development. Promotion of the tourism benefits and initiatives** are also important to garner support from government leaders and the business community. As such, strategic promotions of the tourism industry should occur on an internal basis, to attract investment, and in approaching key consumer markets.

Objective 1: Efforts to promote and educate government leaders, the business community, and residents on tourism initiatives and benefits are continued

Objective 2: Tourism promotion efforts for economic development are enhanced

Objective 3: Virginia is positioned based on the lures of tourism assets with a strategy to improve connectivity among destinations, attractions, and visitor themes

Objective 4: Visitor markets with high impact continue to be targeted, while new markets are explored

Objective 1: Efforts to promote and educate government leaders, the business community, and residents on tourism initiatives and benefits are continued

The economic and socio-economic benefits of tourism are widespread, yet often not readily visible. To help garner support for tourism initiatives (product development, infrastructure, marketing, etc.) and establish recognition of tourism as economic development, local government officials, state government officials, the business community, and residents should continually be informed of these benefits. Economic benefits include visitor expenditures, tax revenue, jobs, and resident income that support businesses and government and are spread across a number of business sectors, directly impacting restaurants, hotels, retail, arts, entertainment, recreation, and others. Socio-economic benefits often include improved quality of life, economic diversification of communities, lower resident tax burden, improved infrastructure, enhanced cultural interaction and understanding, greater sense of community pride, and others.

The matrix below is a summary of the strategies and the pages that follow provide a detailed description of each strategy. In regards to the priority/timing, red indicates a high priority.

Strategy	Priority/ Timing	Key Stakeholder Roles	Potential Measures of Success	Comparable Case Study
Communicate and inform local and state government officials on tourism benefits and initiatives	●	DMOs (local, regional, state), Hospitality Associations, Chambers of Commerce, Attraction Management, Private Businesses, VHTA, VACVB, Virginia Chamber, Virginia Municipal League, Virginia Association of Counties	Number of government communication plans developed Number of education sessions, communications, or materials provided on tourism Completion of research outreach campaign Number of tourism ambassadors identified and engaged	Michigan
Communicate and inform tourism industry stakeholders, including partners, the business community, and residents on tourism initiatives and benefits	●	DMOs (local, regional, state), VHTA, VACVB, Hospitality Associations, Chambers of Commerce, Local Govt	Number of education sessions, communications, or materials provided on tourism benefits, initiatives, and programs Number of tourism program liaisons identified Number of tourism	Faces of Aspen/Snowmass, Colorado

			ambassadors identified	
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Promotions - Educate Government, Businesses, Residents

Strategy 1) Communicate and inform local and state government officials on tourism benefits and initiatives

It is important to ensure government leaders understand the benefit and significance of tourism to communities and are supportive of tourism efforts from a funding, partnership, and policy perspective at a local and state level. As such, promotion of tourism benefits should be continued and reinforced as new government leaders are elected.

Actions:

- Develop communication plans for local and state government officials, including state representatives, and continue to educate and inform officials on tourism benefits as well as ongoing initiatives for economic development. Efforts may include regular meetings, reports, newsletter/email communications, website updates, and press releases throughout the year. The Virginia Municipal League and the Virginia Association of Counties should be engaged in the development of communication plans.
- Communicate tourism benefits on both a quantitative basis (visitor expenditures, tax revenue, jobs, and resident income) and qualitatively showing resident quality of life, social benefits, and community improvement. Research will be critical to form the basis of this messaging to government leaders. Research outreach campaigns should be established by VTC which help to educate DMOs as well as their local government leaders on methodology and results of research.
- Implement an **effort to educate the Tourism Caucus of Virginia's General Assembly** regarding critical tourism issues and potential options for assistance. This effort may involve presentations to the caucus and briefing papers on key issues.
- Identify and engage key opinion leaders on a local or state level 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 on a local and state basis. This effort may also involve residents and private businesses which are able to advocate on behalf of tourism, sharing experiences on how tourism has positively impacted businesses and quality of life.

Priority/Timing: High

Key Stakeholder Roles: DMOs (local, regional, state), Hospitality Associations, Chambers of Commerce, Attraction Management, Private Businesses, VHTA, VACVB, Virginia Chamber, Virginia Municipal League, Virginia Association of Counties, Council on **Virginia's Future**

Measures of Success:

- Number of government communication plans developed
- Number of education sessions, communications, or materials provided on tourism
- Completion of research outreach campaign
- Number of tourism ambassadors identified and engaged

Example Destinations:

- National: Michigan
 - In an effort to gain funding for the Pure Michigan Campaign, the Michigan Lodging and Tourism Association conducted independent research which showed the economic benefits of tourism and the effect of the Pure Michigan Campaign
 - Tourism business owners wrote more than 750 letters to lawmakers and articles were published about the importance of the tourism industry
 - Michigan State University conducted a study which examined the significance of the campaign and the role of citizen participation in tourism

-
- Invite government leaders to events, tourism businesses, and attractions to experience tourism in their communities firsthand

Potential Success Factors:

- Research showing economic, fiscal, and socio-economic benefits of tourism, including quantitative and qualitative evidence
- Continual communication and education process is undertaken beyond times of annual government approvals. This also helps to ensure that newly elected/appointed leaders are engaged following government turnover.

Promotions - Educate Government, Businesses, Residents

Strategy 2) Communicate and inform tourism industry stakeholders, including partners, the business community, and residents on tourism initiatives and benefits

Along those same lines of promoting and educating government leaders regarding the importance of tourism, industry stakeholders, the business community, and residents need to be continually engaged. Industry partners, businesses, and residents serve as key stakeholders in enhancing visitor experiences and supporting local tourism attractions and businesses. Support of tourism initiatives from the business and resident community also enhances government support. As such, efforts for promotion and education of tourism initiatives and benefits should continue.

Actions:

- Create awareness of tourism benefits and ongoing tourism initiatives intended to enhance the economy through open forums, workshop sessions, websites, newsletters, and local promotions of tourism events, attractions, and activities available and accessible to residents in communities
- Educate tourism stakeholders on state and federal programs which impact tourism (positively or negatively) to enable destinations, attractions, and businesses to effectively utilize programs and manage impacts of initiatives. These education efforts should be part of open forums, workshop sessions as well as website and newsletter efforts. Program liaisons or ambassadors should also be assigned to serve as experts for stakeholders. Programs, for example, may include additional outreach regarding cooperative marketing, including available opportunities and benefits of participation.
- Encourage residents and the business community to engage in tourism development and marketing initiatives, serving as ambassadors, ensuring hospitality, participating in promotions, and executing the visitor experience

Potential Success Factors:

- Research showing economic, fiscal, and socio-economic benefits of tourism, including quantitative and qualitative evidence

Priority/Timing: High

Key Stakeholder Roles: DMOs (local, regional, state), VHTA, VACVB, Hospitality Associations, Chambers of Commerce, Local Govt

Measures of Success:

- Number of education sessions, communications, or materials provided on tourism benefits, initiatives, and programs
- Number of tourism program liaisons identified
- Number of tourism ambassadors identified

Example Destinations:

- National: Faces of Aspen/Snowmass, Colorado
 - The Faces of Aspen/Snowmass is a program that inspires locals to consider how the community presents itself to visitors and to create champions of customer service through rewards and incentives
 - The program offers Guest Service Training booklets in visitor centers and rewards employees that show outstanding guest service
 - The City of Aspen offers the Adopt a Tourist program where travelers sign up to be adopted while in Aspen by locals
 - The Aspen Skiing Company offers the On-Mountain Ambassadors program where ambassadors provide information, helpful suggestions, and recommendations to visitors

-
- Continual communication and education process

Objective 2: Tourism promotion efforts for economic development are enhanced

To encourage tourism product development and investment, another critical audience for tourism promotion includes investors, businesses, and developers. For these markets, Virginia's visitor buying power, destination strength, and attractiveness as a state for business and tourism investment should be conveyed. This promotion should be a component of state and local economic development strategies.

The matrix below is a summary of the strategy. In regards to the priority/timing, red indicates a high priority.

Strategy	Priority/ Timing	Key Stakeholder Roles	Potential Measures of Success	Comparable Case Study
Enhance promotion of Virginia to potential tourism investors, businesses, and developers to generate economic development	●	VTC, VEDP, Local Govt, DMOs	Number of tourism economic development initiatives pursued and resulting efforts Number of film efforts pursued	Fonatur, Mexico

Promotions - Economic Development

Strategy) Enhance promotion of Virginia to potential tourism investors, businesses, and developers to generate economic development

While traditional economic development in the state has often focused on company relocations and job creation in key industries such as manufacturing, technology, and others, greater economic development efforts in this sector should be considered given the value of tourism to the state. Targets for tourism-related economic development may include hotel developers, theme park and media companies, international outfitters, and film productions, among others.

For film production, the VTC's Film Office should continue to invest in attracting movie and television productions to the state, which create economic development through film crew visitation and production spending. Film productions also serve to raise awareness of the state. Other states and destinations are highly competitive in the area in offering incentives, and Virginia will need to be positioned to compete.

Actions:

- Identify, pursue, and attract tourism investment as part of economic development strategies at the local and state levels
- Create a focused effort at the state level through a partnership between VTC and VEDP to promote Virginia tourism to investors, developers, and businesses. There needs to be collaboration between the two agencies on this effort.
- Ensure competitive incentives for film productions. It will be important that incentive programs are evaluated for economic effectiveness.

Potential Success Factors:

- Unified approach from VTC and VEDP
- Communication and collaboration among tourism industry stakeholders and economic development officials
- Research showing economic, fiscal, and socio-economic benefits of tourism and film,

Priority/Timing: High

Key Stakeholder Roles: VTC, VEDP, Local Govt, DMOs

Potential Measures of Success:

- Number of tourism economic development initiatives pursued and resulting efforts
- Number of film efforts pursued

Example Destinations:

- National: Fonatur, Mexico
 - Fonatur is the government agency created in 1973 responsible for the planning and development of sustainable tourism projects in Mexico
 - It specifically promotes new development and raises the necessary capital for the projects through foreign and domestic investment
 - To date, the agency has created six Integrally Planned Resorts: Cancun, Ixtapa, Los Cabos, Loreto, Huatulco, and Nayarit
 - Cancun was the first Integrally Planned Resort completed in 1974
 - By 1976, there were 18,000 residents, more than 5,000 jobs, 1,500 hotel rooms, and more than 100,000 visitors during the winter season
 - More recently, Fonatur has focused on building nine marinas and its newest Integrally Planned Resort in Nayarit

including quantitative and qualitative evidence

Objective 3: Virginia is positioned based on the lures of tourism assets with a strategy to improve connectivity among destinations, attractions, and visitor themes

With numerous and diverse tourism opportunities across the Commonwealth, improving connections among attractions further enhances the visitor experience. Virginia has the opportunity to increase connectivity through promotional efforts. Partnerships and collaboration among tourism stakeholders will also play a fundamental role in ensuring these connections.

The matrix below is a summary of the strategies and the pages that follow provide a detailed description of each strategy. In regards to the priority/timing, red indicates a high priority and blue indicates a medium priority.

Strategy	Priority/ Timing	Key Stakeholder Roles	Potential Measures of Success	Comparable Case Study
Enhance and create visitor itineraries and packages	●	DMOs (local, regional, state), Attraction Management, Private Businesses	Number of itineraries and packages created and improved Number of partnership audits completed	Northeast Tourism Hub & Spoke Initiative, North Carolina
Enhance and develop themed trails	●	DMOs (local, regional, state), Attraction Management, Private Businesses, VA Department of Historic Resources, DCR, NPS, VDOT, VHTA, Artisan Center of Virginia, Virginia Wine Marketing Office	Number of trail experiences developed or enhanced Number of trails connected to multiple visitor themes	Art and Earth Trail, Indiana

Promotions - Connectivity

Strategy 1) Enhance and create visitor itineraries and packages

Visitor research shows the "hub and spoke" behavior patterns of travelers highlight the need for promotional connectivity among destinations and attractions through elements such as itineraries and packages so that the visualization of the tourism experience in Virginia is readily available.

Actions:

- Continue to connect destinations and attractions with itineraries for "hub and spoke" visitor experiences related to key visitor themes and specific visitor markets such as families, couples, outdoor enthusiasts and others on an ongoing basis. DMOs, attractions, and the VTC should continue to engage in these connection efforts.
- Enhance packages of attractions, accommodations, and other amenities as well as cross-promotion/discounts of attractions across regions in the Commonwealth. Cross-border initiatives with neighboring states should also be explored.
- Conduct a partnership audit or assessment within communities and neighboring areas so key stakeholders can be identified to help improve connectivity, authenticity, and visitor experiences. Identify public and private sector partners within communities and neighboring areas for **"hub and spoke" opportunities**.

Potential Success Factors:

- Cooperation and collaboration among DMOs and private businesses/attraction management
- Utilizing grant funds and cooperative marketing arrangements for promotional connectivity initiatives
- Commitment to communication among stakeholders

Priority/Timing: High

Key Stakeholder Roles: DMOs (local, regional, state), Attraction Management, Private Businesses

Potential Measures of Success:

- Number of itineraries and packages created and improved
- Number of partnership audits completed

Example Destinations:

- National: Northeast Tourism Hub & Spoke Initiative, North Carolina
 - The Northeast Tourism Hub & Spoke Initiative was designed by North Carolina's Northeast Commission to increase visitation to the region as a whole and especially for not-so-traveled areas that are within an hour's drive of major destination areas that can accommodate motorcoach groups and individual travelers
 - The program identified six "hub" locations where there is existing hotel inventory, restaurants, and visitor amenities to accommodate motorcoach and other group travelers and prepared itineraries for day trips to "spoke" destinations
 - This concept allows the small towns to reap the benefits brought by a group of 50 travelers spending the day in the small town visiting local attractions, shops, and restaurants.

Promotions - Connectivity

Strategy 2) Enhance and develop themed trails

Virginia is home to a number of themed trails, including Civil War, Crooked Road, Round the Mountain, Journey Through Hallowed Ground, wine trails, and others. These trails connect attractions while further defining the visitor experience. Promotional connectivity through new trail development should continue to be distinctive and seek to connect multiple themes. For example, the proposed Arts & Ag trail in Shenandoah County is intended to connect artisans, farms, lodging, and dining.

Actions:

- Enhance and develop themed trails that connect attractions and destinations. These may be oriented to outdoor recreation, culinary, arts, music, history, and other key visitor themes.
- Continue to promote existing trails and brand distinctive trails for visitor experiences to help define the tourism experience
- Strategically connect trails to various types of attractions and combine themes as appropriate, such as arts and agriculture, history and wine, etc. Enhance trail promotions by developing smartphone applications which allow visitors new and convenient ways to experience the trails in Virginia.

Potential Success Factors:

- Cooperation and collaboration among DMOs and private businesses/attraction management for trail creation
- Utilizing grant funds and cooperative marketing arrangements for promotional connectivity initiatives

Priority/Timing: Medium

Key Stakeholder Roles: DMOs (local, regional, state), Attraction Management, Private Businesses, VA Department of Historic Resources, DCR, NPS, VDOT, VHTA, Artisan Center of Virginia, Virginia Wine Marketing Office

Potential Measures of Success:

- Number of trail experiences developed or enhanced
- Number of trails connected to multiple visitor themes

Example Destinations:

- National: Art and Earth Trail, Indiana
 - The Northern Indiana Tourism Development Commission developed the Art and Earth Trail in northern Indiana
 - The trail is made up of seven loops that connect unique artisan and agri-tourism venues including locally-owned accommodations, restaurants, nurseries, antique shops, farms, studios, and galleries
 - Venues on the trail were selected according to strict criteria and had to be authentic, easily accessible, and reflective of northern Indiana
 - Overall, the trail provides an authentic experience for visitors and is a significant economic development initiative that has increased visitation and visitor spending in the area.

Objective 4: Visitor markets with high impact continue to be targeted, while new markets are explored

Visitors are the primary target of promotions for the tourism industry. From a strategic perspective, it is important that key visitor markets for Virginia continue to be targeted in a tactical manner. With continually changing demographics and visitor preferences, targeting markets with high return on investment should continue to be explored, which may include enhanced national, international, and niche marketing.

The matrix below is a summary of the strategy and the pages that follow provide a detailed description of the strategy. In regards to the priority/timing, red indicates a medium priority.

Strategy	Priority/ Timing	Key Stakeholder Roles	Potential Measures of Success	Comparable Case Study
Continue to identify and evaluate key geographic and thematic target markets for promotions	●	DMOs (local, regional, state), Hospitality Associations, Chambers of Commerce, Local Govt	Evaluation of potential target markets completed Number of new marketing initiatives explored Increase ROI indicated through market studies Increase in number (or share) of visitors from key geographic markets or theme/niche markets Number of key visitor theme or niche market promotional initiatives	Pure Michigan

Promotions - High Impact Markets

Strategy) Continue to identify and evaluate key geographic and thematic target markets for promotions

Key origin markets for visitors to Virginia should continue to be pursued and new and emerging markets should continue to be explored, including opportunities for additional out-of-state and international markets. With a diverse number of visitor experiences available in Virginia, those experiences and attractions that appeal to specific visitor interests should also continue. These may include particular history & heritage, nature/outdoor recreation, culinary, arts & music, and other visitor themes. The decision to target specific markets should be driven by research.

Actions:

- Identify, evaluate, and measure market share opportunities for domestic and international target audiences based on state and regional research
- Continue to identify critical markets which offer strong domestic and international visitor potential based on research. These include historically strong key origin markets, markets with ease of accessibility such as bordering states and markets with direct flights to Virginia, and emerging origin markets.
- Target key markets that provide high return on investment for domestic and international audiences based on state and regional research
- Explore additional strategic investments in national advertising as Virginia has the opportunity to further elevate its image and brand as a tourism destination. For example, Virginia recently returned to television advertising in eight major out-of-state markets aimed at 15 million consumers.
- Evaluate international opportunities through CRUSA, Travel South, and Southeast Tourism Society initiatives as well as other concerted efforts to promote Virginia to international visitors from traditional international markets (i.e. European countries) and emerging travel markets, which may include China, Brazil, etc. Promotions to international visitors once they arrived in the U.S. should also be continued through entry points, in connection with airlines, and other means.

Priority/Timing: High

Key Stakeholder Roles: DMOs (local, regional, state), Hospitality Associations, Chambers of Commerce, Local Govt

Potential Measures of Success:

- Evaluation of potential target markets completed
- Number of new marketing initiatives explored
- Increase ROI indicated through market studies
- Increase in number (or share) of visitors from key geographic markets or theme/niche markets
- Number of key visitor theme or niche market promotional initiatives

Example Destination:

- National: Pure Michigan
 - The Pure Michigan advertising campaign started in 2006 as a regionally concentrated campaign, but was launched nationally in 2009
 - In 2012, the budget for the national campaign was \$12 million, which is the largest amount ever. Each of the four partners, Ann Arbor, Mackinac Island, The Henry Ford, and Traverse City, contributed \$500,000 for the national advertising.
 - In 2010, more than two million additional people traveled to Michigan and spent an additional \$605 million during their stay as a result of the campaign

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- Continue to study key thematic markets and channels, including on-line and social media, given specialization of interests of potential visitors
 - Explore grant funds and cooperative marketing arrangements such as the VTC Marketing Leverage grant

Potential Success Factors:

- Coordination and cooperation in the planning, study, and execution of national and international marketing efforts among local, regional, and state destination marketing organizations, attraction management, and private businesses
- Destination marketing organizations, attraction management, and private businesses are encouraged to cooperate to approach these key markets in a cohesive manner
- Measurement of the effectiveness of marketing efforts

Outcome 5 – Policies

Policies are created and supported that allow for an integrated approach to the enhancement of visitor experiences, partnerships, and promotions, while improving quality of life and overall economic development

Policy Objectives

Policies and programs create the environment which enable economic growth, sustainability, and a sound business environment for tourism with the aims of strong funding, business assistance, state government agencies, and assets that result in "win-win" situations for the tourism industry. Virginia has implemented policies and programs which support the tourism business environment and protect key assets, and these policies should be continued and enforced. Furthermore, additional improvements should continue to be explored through cooperative efforts among industry stakeholders. Ultimately, the policies and programs are intended to contribute to tourism growth and competitiveness of the tourism industry.

Objective 1: Funding is available for tourism growth

Objective 2: Tourism policies and programs which provide assistance for growth and development are enhanced

Objective 3: Policy for government cooperation is created to assist and support the tourism industry

Objective 4: Policies and programs designed to preserve historical, cultural, and natural assets are maintained

Objective 1: Funding is available for tourism growth

Funding is a driving factor enabling tourism growth. Funding for both product development and marketing was cited by stakeholders as the two greatest challenges for the tourism industry. In the next five years, ensuring that existing policies related to funding are enforced and managed, while new sources of funding are explored, will be important for the industry.

The matrix below is a summary of the strategies and the pages that follow provide a detailed description of each strategy. In regards to the priority/timing, red indicates a high priority and blue indicates a medium priority.

Strategy	Priority/ Timing	Key Stakeholder Roles	Potential Measures of Success	Comparable Case Study
Enforce policy for use of tourism tax revenues collected by localities	●	VHTA, VTC, VACVB, Virginia Chamber, Local Govt, DMOs, Hospitality Associations, Private Businesses	Number of efforts organized to ensure tax usage Evaluation of Virginia tax code legislation related to the use of	Asheville, North Carolina

			tourism-related taxes Evaluation of the creation of tourism councils	
Explore alternative, non-tax funding sources for dedicated tourism revenue stream for the state	●	VTC, State Government Departments, State Legislators, DMOs, VHTA, VACVB, Virginia Chamber	Evaluation of alternative funding sources completed Securitization of a dedicated funding source for tourism	Tourism Ohio New Funding Model
Create sustainable funding policies for tourism marketing and development for communities	●	Local Govt, DMOs, VACVB, VHTA, Private Businesses	Number of new funding arrangements Number of tourism revenue evaluations Number of cooperative funding arrangements	Buncombe County Tourism Development Authority Tourism Development Fund, Asheville

Policies - Funding

Strategy 1) Enforce policy for use of tourism tax revenues collected by localities

Uses of transient occupancy taxes by localities are defined through Virginia code § 58.1-3819. As the code is written, use of the tax revenue may be open to some interpretation and tax revenues which go into the general fund may not be allocated to direct tourism efforts at times. This tax code should be enforced to ensure consistent use of tourism taxes for tourism initiatives in communities across the state. As necessary, tightening of the tax code legislation should also be explored to better define the use of the tax.

Actions:

- Ensure the existing policies for use of tourism tax revenues on communities are enforced. This action may involve collaboration of tourism stakeholders and advocates to help influence local government.
- Explore tightening tax code legislation language to better ensure that tourism taxes are used for tourism promotion and development to clearly denote the permitted use of tourism-related tax revenue
- Explore the development of a tourism council at the community level, which is comprised of public and private stakeholders that are responsible for overseeing the use of tourism tax revenue in the community. Tourism councils could be a uniform requirement under a change in Virginia Code or a voluntary initiative put into place by localities.

Potential Success Factors:

- Ensuring consistent use of tourism taxes for tourism initiatives in communities
- Widespread support, collaboration, and representation, as needed, to influence government actions and policy
- Research showing economic, fiscal, and socio-economic benefits of tourism
- Continued education on tourism benefits to government leaders, businesses, and residents to encourage support for tourism investment
- Funding arrangements independent of changes in government administration

Priority/Timing: High

Key Stakeholder Roles: VHTA, VTC, VACVB, Virginia Chamber, Local Govt, DMOs, Hospitality Associations, Private Businesses

Potential Measures of Success:

- Number of efforts organized to ensure tax usage
- Evaluation of Virginia tax code legislation related to the use of tourism-related taxes
- Evaluation of the creation of tourism councils

Example Destination:

- National: Asheville, North Carolina
 - Asheville hoteliers and community leadership imposed a tax on local hotels in 1983 that authorized a two percent room occupancy tax on lodging properties with five or more units, which has since increased to four percent
 - A Tourism Development Authority was also created, which is responsible for administering proceeds of the tax to "further the development of travel, tourism, and conventions in the county through state, national, and international advertising and promotion"
 - Within 20 years of the legislation, the economic impact of tourism within the county grew 400 percent and now accounts for more than \$2.12 billion in direct, induced, and non-direct spending from overnight visitors

Policies - Funding

Strategy 2) Explore alternative, non-tax funding sources for dedicated tourism revenue stream for the state

Governor McDonnell appropriated significant additional investment in tourism and film marketing in 2010. This is a considerable commitment to growth; however funding for tourism at the state level continues to be at risk on an annual budget basis, which may limit the ability to plan for and engage in longer-range efforts. It is suggested that sources of funding dedicated to tourism be identified and allocated. Alternative sources would not increase taxes, fees, or assessments on Virginia businesses and residents, but rather it would allow for a dedicated level of guaranteed funding at the state level while communities continue to receive their portion of local and state tourism tax revenue collected. With the importance of funds for continued growth, new or innovative options should be evaluated, which would benefit tourism.

Actions:

- Explore alternative funding sources that can be dedicated for tourism initiatives (marketing and development initiatives). These sources should not stem from tax increases, but should be dedicated for tourism funding. This is consistent with recommendations of the Governor's Job's Commission Report for a dedicated tourism stream.
- Evaluate various alternative funding methods used in other states at a state level and community level
- Identify specific uses for new funding sources and anticipated benefits

Potential Success Factors:

- Widespread support from industry stakeholders and efforts to influence government actions and policy, as needed
- Research showing economic, fiscal, and socio-economic benefits of tourism
- Continued education on tourism benefits to government leaders, businesses, and residents to encourage support for tourism investment

Priority/Timing: Medium

Key Stakeholder Roles: VTC, State Government Departments, State Legislators, DMOs, VHTA, VACVB, Virginia Chamber

Potential Measures of Success:

- Evaluation of alternative funding sources completed
- Securitization of a dedicated funding source for tourism

Example Destinations:

- National: New Tourism Ohio Funding Model
 - In July 2012, Governor John Kasich of Ohio signed Senate Bill 314 which implemented a new funding model for tourism.
 - Dedicated funding will be provided from a portion of the year-over-year increase in state sales tax dollars generated by the businesses the Dept. of Taxation classifies as tourism businesses.
 - No new taxes are implemented and no tax rates are increased as a result of the funding model. The taxes are already being collected, but were not directly funding tourism marketing.
 - Proposed legislation includes \$5 million for Tourism Ohio in the first year until the funding model begins the second year. Legislation is proposed as a five year pilot funding model with a cap of \$10 million in any fiscal year.
 - The fund will be revolving, meaning that not all of the money has to be spent in the fiscal year.

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- Ensure funding arrangements are independent of changes in government administration

Policies - Funding

Strategy 3) Create sustainable funding policies for tourism marketing and development for communities

In addition to enforcing current bed tax policies, it will also be important for communities to ensure sustainable funding policies are in place for further tourism marketing and product development.

Actions:

- Ensure arrangement for continued securitization of existing tourism tax revenue streams
- Explore additional opportunities for tourism revenue streams to fund marketing and tourism development
- Continue to explore cooperative marketing arrangements with other tourism partners, increasing connectivity and synergies
- Ensure accountability systems are in place which measures return on investment

Potential Success Factors:

- Cooperation and support among public and private stakeholders for additional investment in tourism
- Research on tourism visitation, spending, and return on investment initiatives

Priority/Timing: High

Key Stakeholder Roles: Local Govt, DMOs, VACVB, VHTA, Private Businesses

Potential Measures of Success:

- Number of new funding arrangements
- Number of tourism revenue evaluations
- Number of cooperative funding arrangements

Example Destinations:

- National: Buncombe County Tourism Development Authority Tourism Development Fund, Asheville
 - In 2001, the Buncombe County Tourism Development Authority (highlighted in a prior case), increased the Buncombe County hotel occupancy tax from three to four percent to create the Tourism Development Fund
 - 100 percent of the additional one cent tax on each dollar spent on lodging in the county is added to the development fund, which is dedicated to providing financial assistance for major tourism projects that will increase the number of hotel room nights and generate additional economic impact for the area
 - Since its inception, the fund has awarded more than \$13.5 million to 14 community tourism projects

Objective 2: Tourism policies and programs which provide assistance for growth and development are enhanced

Programs and policies which support tourism marketing efforts, tourism development, and assist tourism businesses should be continued and enhanced. These include established national and state programs, including the Marketing Leverage Program and the Tourism Development Financing Program, business assistance services such as facilitation and financing, and policies that improve the business environment. In the next five years, it is also important for Virginia to seek opportunities for continual improvement of policies to remain competitive.

The matrix below is a summary of the strategies and the pages that follow provide a detailed description of each strategy. In regards to the priority/timing, red indicates a high priority and blue indicates a medium priority.

Strategy	Priority/ Timing	Key Stakeholder Roles	Potential Measures of Success	Comparable Case Study
Continue and enhance programs which support tourism marketing	●	VTC, DMOs, Hospitality Associations, Attraction Management, Private Businesses, VACVB, VHTA, Virginia Chamber	Assessment of ROI from marketing funds completed Evaluation of competitive funding levels completed Increase in grant funding Evaluation of marketing program restriction waivers Evaluation of additional types of leverage grants	Wisconsin Meetings Mean Business Grant
Continue and explore improvements for programs which support tourism product development	●	VTC, DMOs, Hospitality Associations, Attraction Management, Private Businesses, VACVB, VHTA, Virginia Chamber	Number of partners who have participated in the Tourism Development Financing program Evaluation of tourism development fund completed Establishment of product development funding Total amount of capital invested and jobs created related to development	Ontario Tourism Development Fund

			initiatives	
Explore establishment of assistance program for tourism businesses	●	VTC, Dept of Business Assistance, Local Govt – Eco Development, VEDP, Private Businesses, VHTA, Hospitality Associations, Virginia Business Incubation Association	<p>Number of financing assistance efforts for tourism small businesses</p> <p>Number of tourism business incubator programs evaluated and developed</p> <p>Number of jobs created from assistance programs</p> <p>Number of new Partnership Marketing field representatives added</p>	Experiential Tourism Incubator, Washington & Hancock Counties, Maine
Continue to evaluate policies which encourage an attractive tourism business environment	●	Chambers of Commerce, Hospitality Associations, Local Govt, VTC, Attraction Management, Private Businesses, VHTA, VACVB, Virginia Chamber	<p>Number of policies evaluated</p> <p>Number of new policies approved/policy revisions which enable tourism business growth</p>	Senate Bill 2341, Hawaii
Educate public and private sector stakeholders on legislative policies and programs impacting tourism	●	VTC, Local Govt, DMOs, DCR, VA Dept of Historic Resources, VDOT, VA Commission for the Arts, VHTA, VACVB	<p>Number of advocates/liaisons identified</p> <p>Number of stakeholder outreach sessions</p> <p>Aggregation of guidance for state and national programs</p>	Pennsylvania Tourism Industry

Policies - Tourism Policies and Programs for Assistance

Strategy 1) Continue and enhance programs which support tourism marketing

The Marketing Leverage Program is a grant program designed to stimulate new tourism marketing programs through the creation of tourism partnerships and to extend the "Virginia is for Lovers" campaign. In addition, similar grant funding programs include the American Civil War Sesquicentennial Tourism Marketing Program and the Tourism and the Arts Marketing Program. For the Marketing Leverage grant, entities are required to partner to apply for funding. State/federal agencies may not be the lead partner and any applications with a state/federal agency must have at least two additional non-state/federal agency partners. Each application must have a lead applicant, who can only be the lead partner in one program per funding cycle. There are two tiers within the program: Tier One offers funds up to \$10,000 with a one-to-one match requirement; Tier Two offers funds from \$10,001 to \$50,000 with a two-to-one match requirement. The Marketing Leverage Program which provided approximately \$1.4 million in matching funds in 2011 is widely supported by tourism stakeholders and is viewed as a significant benefit to tourism businesses and communities, while it also encourages tourism partnerships. However, areas for improvement should continue to be explored.

Actions:

- Continue grant funding programs for tourism marketing. Funds dispersed should be evaluated for return on investment and effectiveness in the marketplace on an annual basis.
- Explore an increase in available marketing grant funds to greater competitive levels. It is suggested that an evaluation be conducted of grant programs offered by other states. Virginia offers approximately \$1.4 million per year in grant funding. Other states such as West Virginia have provided matching funds through its Matching Advertising Partnership Program in recent years of \$1.2 million to \$3.4 million, while New York has provided nearly \$4 million in similar grant funding.
- Evaluate potential benefits from waivers to partnership requirements and restrictions to enable greater access and participation, although the program encourages cooperation among tourism applicants, and consider raising the maximum level of grants available

Priority/Timing: Medium

Key Stakeholder Roles: VTC, DMOs, Hospitality Associations, Attraction Management, Private Businesses, VACVB, VHTA, Virginia Chamber

Potential Measures of Success:

- Assessment of ROI from marketing funds completed
- Evaluation of competitive funding levels completed
- Increase in grant funding
- Evaluation of marketing program restriction waivers
- Evaluation of additional types of leverage grants

Example Destination:

- National: Wisconsin Meetings Mean Business Grant
 - Specific marketing leverage grants for meetings and conventions in addition to traditional programs
 - Provides destinations financial assistance for facility costs or host destination expenses as they bid for regional/national meetings or conventions that generate significant economic impact from additional room night bookings and traveler spending in the community in which they are held
 - Includes associations and organization meetings, tradeshow, education, reunions, or socializing
 - Destinations may apply for 50 percent of the costs for a convention facility rental, in-community

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- Explore additional types of leverage grants such as those that focus on key visitor themes or those that focus exclusively on out-of-state or international marketing

Potential Success Factors:

- Communication with stakeholders to understand on-going development and marketing initiatives
- Enabling policies which allow for creation and expansion of tourism funding programs
- Securing funding sources and ensuring sufficient funding levels available for programs
- Research showing economic, fiscal, and socio-economic benefits of tourism
- Continued education on tourism benefits to government leaders, businesses, and residents to encourage support for tourism investment
- Support for program among tourism industry stakeholders

Policies - Tourism Policies and Programs for Businesses and Destinations

Strategy 2) Continue and explore improvements for programs which support tourism product development

The Tourism Development Financing Program defined under Section § 58.1-3851.1 of the Virginia Code is a relatively new program designed to provide a gap financing mechanism for projects in partnership with developers, localities, financial institutions, and the state. In order to qualify for the program, a performance agreement must be secured, tourism zones for the locality must be defined, a tourism development plan must be approved by the VTC, and all necessary documentation and fees must be submitted. In 2012, the first development project received funding from this program. Other programs that support the development and preservation of tourism assets include the Virginia Recreational Trails Fund, the Land and Water Conservation Fund, and Community Development Block Grants.

This program is a significant step for providing assistance for new tourism developments. However, given the program requirements, the program is somewhat oriented to larger-scale tourism projects. As such, programs which are targeted to smaller-scale developments should be explored. These may include funding programs to support key visitor themes such as outdoors, culinary, agri-tourism, music, etc. A potential solution for funding smaller-scale projects is the establishment of a tourism development fund that could provide grants. This fund would be similar in concept to the Marketing Leverage Program, but funds would be used for product development efforts rather than marketing.

Actions:

- Explore the creation of a tourism development fund, which allows for greater accessibility for smaller-scale development projects and small businesses. It is suggested that an evaluation of other development funds be conducted to ensure Virginia is funded at competitive levels. The local development fund in Asheville, North Carolina has \$1.8 million in funding. Georgia has a Tourism Product Development Agreement Program that provides up to \$15,000 per applicant for tourism product initiatives.

Priority/Timing: High

Key Stakeholder Roles: VTC, DMOs, Hospitality Associations, Attraction Management, Private Businesses, VACVB, VHTA, Virginia Chamber

Potential Measures of Success:

- Number of partners who have participated in the Tourism Development Financing program
- Evaluation of tourism development fund completed
- Establishment of product development funding
- Total amount of capital invested and jobs created related to development initiatives

Example Destination:

- International: Ontario Tourism Development Fund
 - Ministry created a fund which supports tourism investment, development, and industry capacity building. The fund aims to:
 - Support the creation or revitalization of tourism attractions, sites, and experiences
 - Support innovative product development for emerging sectors with market potential
 - Enhance the quality of tourism services, businesses, and practices through training
 - Assist with tourism planning and capacity support to ensure that the tourism industry is well positioned to make future strategic decisions, address issues and opportunities, and improve its image as an economic driver for the province

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- Ensure development assistance for completing a tourism development plan and establishing a tourism zone is available for continued growth of the Tourism Development Financing Program
 - Continue to provide education and promotion of the Tourism Development Financing program

Potential Success Factors:

- Communication with stakeholders to understand on-going development initiatives
- Enable policies which allow for creation and expansion of tourism funding programs
- Ensuring funding sources and sufficient funding levels available for programs
- Continued education on tourism benefits to government leaders, businesses, and residents to encourage support for tourism investment

Policies - Tourism Policies and Programs for Assistance

Strategy 3) Explore establishment of assistance program for tourism businesses

While Virginia offers programs for small businesses that provide financing assistance, such as those through the Department of Business Assistance, additional programs at a state and/or local level which are dedicated to tourism businesses should be explored.

Actions:

- Explore the development of programs, which provide financing assistance specifically for tourism businesses. These programs could be established at a state or local level. Such programs would be designed to provide tourism small businesses and entrepreneurs with start-up financing and financial assistance for expansions. Businesses may include outfitters, guides, B&Bs, agri-tourism businesses, wineries, and similar businesses related to tourism. It is suggested that a broader incubator program be incorporated.
- Explore broader business incubator programs, which in addition to financing assistance, provide business support such as planning, marketing assistance, development, and other assistance. A tourism business incubator can be described as an instrument for economic development that supports the establishment and growth of tourism businesses. An incubator may take a number of forms, but the primary purpose is to foster the success of tourism businesses.
- Increase Partnership Marketing staff in the field to cover tourism regions in the state for increased tourism assistance

Potential Success Factors:

- Collaboration among tourism representatives, Department of Business Assistance, and other economic development organizations, as appropriate
- Dedicating financing sources committed to tourism businesses
- Commitment from financial institutions
- Promotion of program benefits and eligibility for tourism stakeholders
- Enable policies which allow for creation of tourism business assistance resources

Priority/Timing: Medium

Key Stakeholder Roles: VTC, Dept of Business Assistance, Local Govt – Eco Development, VEDP, Private Businesses, VHTA, Hospitality Associations, Virginia Business Incubation Association

Potential Measures of Success:

- Number of financing assistance efforts for tourism small businesses
- Number of tourism business incubator programs evaluated and developed
- Number of jobs created from assistance programs
- Number of new Partnership Marketing field representatives added

Example Destination:

- National: Experiential Tourism Incubator, Maine
 - Designed for experiential tourism that enables rural communities to take advantage of their regional heritage, culture, and natural resources in a way that maximizes the financial gain from tourism while minimizing environmental impact
 - Offers training, technical assistance, business counseling, financing, and business-to-business networking opportunities to assist tourism-related businesses to grow and create jobs
 - Funded by a grant from the U.S. Department of **Health and Human Services' Office of Community Services**, and a grant from the Birch Cove Fund of the Maine Community Foundation.

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- Continued education on tourism benefits to government leaders, businesses, and residents

Policies - Tourism Policies and Programs for Assistance

Strategy 4) Continue to evaluate policies which encourage an attractive tourism business environment

As the tourism industry in Virginia grows and evolves in the next five years, it will be important for stakeholders to continue to evaluate policies and seek opportunities to maximize the business environment. Examples of the types of policies that should continue to be encouraged include: 1) Senate Bill 604 which allows for the retail sale of beer and sampling on the premises of Virginia breweries, providing brewers the ability to have tasting rooms similar to wineries, and 2) House Bill 359 which allows manufacturers to lease space in their brewhouses to smaller-scale brewers, which is intended to reduce some of the significant start-up costs and ultimately allow small-scale breweries to grow.

Actions:

- Continue to evaluate business policies, ordinances, codes, etc. that may impact visitation and tourism business growth. This is particularly important for tourism segments that may be emerging in certain localities such as aqua-tourism, agri-tourism, wineries, B&Bs, music, arts, etc. as well as policies related to events and festivals. These businesses should be able to invest in experiences related to events, food service, retail, and other operations which serve to attract additional visitors and increase business revenues. As appropriate, new policies or amendments should be explored.

Potential Success Factors:

- Advocacy by tourism industry associations and state government organizations to ensure limited restrictions on tourism businesses
- Cooperation among government leaders and private businesses

Priority/Timing: Medium

Key Stakeholder Roles: Chambers of Commerce, Hospitality Associations, Local Govt, VTC, Attraction Management, Private Businesses, VHTA, VACVB, Virginia Chamber

Potential Measures of Success:

- Number of policies evaluated
- Number of new policies approved/policy revisions which enable tourism business growth

Example Destination:

- National: Senate Bill 2341, Hawaii
 - Senate Bill 2341 in Hawaii is an example of legislation that enables agri-tourism businesses to expand its tourism offerings
 - The bill is intended to eliminate state oversight of short-term rentals in agricultural districts as long as the rental "coexists with a bona fide agricultural activity"
 - Currently, all short-term rentals require both county approval and a special use permit from the state
 - Applying for the special use permit is a lengthy process that can take over a year to obtain
 - The new law would allow short-term rentals on agricultural land to be considered an accessory use, instead of a special use, which would eliminate the need for a special use permit

Policies - Tourism Policies and Programs for Assistance

Strategy 5) Educate public and private sector stakeholders on legislative policies and programs impacting tourism

It is important for stakeholders to be well-informed of legislative policies and programs, which help to support tourism initiatives and those that impact tourism. This will allow stakeholders to better utilize and manage these programs and policies effectively. Examples include education of how the bed tax can be spent, establishment of tourism zones, the Tourism Development Financing Program, other state programs from DHCD, VDEP, Department of Business Assistance, etc., and national programs available for tourism-related development.

National programs may include the National Park Service American Battlefield Protection Program, the USDA Farmers Market Promotion Program, National Endowment for the Humanities Challenge Grants, the Historic Preservation Fund Grant program, the Department of Interior Save America's Treasures grants, and the Department of Transportation Recreational Trails Program grants.

Actions:

- Continue to provide information and accessibility regarding tourism-related policies and programs (state and national) related to the use of bed tax, tourism development, economic development, and business assistance, which allows for stakeholders to leverage available programs. Aggregate guidance and provide through multiple channels.
- Provide stakeholder outreach through workshops, sessions, and community assistance. VTC staff should assist in this area through its ongoing assistance efforts.
- Establish advocates and liaisons at a local and state level for these policies and programs which can provide assistance to tourism stakeholders

Potential Success Factors:

- Information on available state and national programs

Priority/Timing: Medium

Key Stakeholder Roles: VTC, Local Govt, DMOs, DCR, VA Dept of Historic Resources, VDOT, VA Commission for the Arts, VHTA, VACVB

Potential Measures of Success:

- Number of advocates/liaisons identified
- Number of stakeholder outreach sessions
- Aggregation of guidance for state and national programs

Example Destination:

- National: Pennsylvania Tourism Industry
 - The Pennsylvania tourism industry website effectively displays information about marketing, state funding & assistance, and the PA Sign Programs in one place
 - The Pennsylvania Association of Travel & Tourism (PATT) delivers a unified voice for the industry and uses a monthly email, direct contact, news bulletin, website, and social media to communicate with members
 - PATT and the Pennsylvania Tourism Coalition both educate government officials and industry stakeholders on public policy and emerging issues affecting the tourism industry and on the economic, cultural, and social impact of Pennsylvania travel and tourism

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- Identification of resources for assistance in utilizing programs
 - Commitment from advocates and liaisons to assist stakeholders

Objective 3: Policy for government cooperation is created to assist and support the tourism industry

A tourism policy has been defined as a set of regulations, rules, guidelines, directives, and development/ promotion objectives and strategies that provide a framework within which the collective and individual decisions directly affecting tourism development and the daily activities within a destination are taken¹. With tourism impacting numerous sectors of Virginia's economy, an important element in growing tourism in the Commonwealth in a strategic and planned manner is the development of a tourism policy to help guide this approach to growth.

While tourism policies may exist on a national level, which typically provide authority to a national governing body, the proposed policy is similar in theory to the Virginia Coastal Zone Management Program, established initially by Executive Order in 1986 and continued through an order by each new governor. As such, Governor McDonnell signed Executive Order No. 18 in 2010 to extend the program. The policy was developed for coastline management purposes among numerous state organizations and planning district commissions. Members of the Coastal Policy Team identify issues that cut across agency jurisdictions and develop policy recommendations. For tourism, it is proposed that if major new initiatives are considered such as off-shore drilling, transportation projects (including toll roads, new rail projects, etc.), wind turbines, etc., the impact on tourism should be considered, planned for, and managed in a cohesive and cooperative manner among state agencies.

The matrix below is a summary of the strategy and the pages that follow provide a detailed description of the strategy. In regards to the priority/timing, blue indicates a medium priority.

Strategy	Priority/ Timing	Key Stakeholder Roles	Potential Measures of Success	Comparable Case Study
Establish policy for cooperative guidelines and arrangements for cohesive government approach to the tourism industry	●	State Government Departments/Agencies, including VTC, Local Government Departments	Development of tourism policy guidelines Identification of partners which may participate in guidelines Number of MOUs for cross-department planning Number of cross-department/agency board appointments Number of tourism contacts	Texas

¹ Policy, Structure, Content and Process 9th Edition 2003

			identified in government departments	
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Policies - Tourism Policy for Government

Strategy) Establish policy for cooperative guidelines and arrangements for cohesive government approach to the tourism industry

A tourism policy is proposed that is intended to ensure that tourism initiatives are approached from a broad perspective in consideration of other major initiatives, which may be undertaken, and in a cooperative manner for sustainable, strategic tourism development through policy and planning. Policy guidelines may be applicable at the state and local level.

Actions:

- Establish tourism policy guidelines for government departments/agencies that aid in the decision making process on initiatives that may impact tourism
- Include the Commonwealth's philosophy and approach to the tourism industry, which more than most industries, affects a broad range of economic sectors
- Include guidelines for strategic planning and cooperation among government departments most highly involved in tourism, information sharing and briefings, and others. Specific elements should include:
 - Creation of a MOU encouraged by the Governor between the departments/agencies to adopt and integrate their planning, process, and programs to reinforce the aspects of the State Tourism Plan. At the state level, these departments may include VEDP, VDOT, DCR, DHCD, VA Dept of Historic Resources, Dept of Agriculture, and others deemed appropriate
 - Identify tourism contacts within key government departments. At the state level, for example, this may include VDOT, VEDP, Department of Agriculture and Consumer Services, and others.

Potential Success Factors:

- Collaboration, cooperation, and communication among government organizations
- Establishing accountability for execution and adherence to tourism policy for State Government

Priority/Timing: Medium

Key Stakeholder Roles: State Government Departments/Agencies, including VTC, Local Government Departments

Potential Measures of Success:

- Development of tourism policy guidelines
- Identification of partners which may participate in guidelines
- Number of MOUs for cross-department planning
- Number of cross-department/agency board appointments
- Number of tourism contacts identified in government departments

Example Destination:

- National: Texas
 - Tourism marketing in Texas is mainly performed by five entities: the Office of the Governor Economic Development & Tourism ("EDT"), Texas Department of Transportation, Texas Parks & Wildlife Department, Texas Commission on the Arts, and the Texas Historical Commission
 - In 2003, these five entities formalized a MOU to improve the coordination of statewide tourism marketing efforts
 - The EDT is the lead entity and each year, the four other entities submit a plan of action for the agency's tourism actions

Objective 4: Policies and programs designed to preserve historical, cultural, and natural assets are maintained

Preservation of Virginia's valuable historic, cultural, and natural assets which serve as important drivers for tourism is critical for ensuring authentic visitor experiences, sustained use, and tourism growth. Virginia has established a number of programs and policies that help to preserve and protect its tourism resources, which should be continued.

The matrix below is a summary of the strategy and the pages that follow provide a detailed description of the strategy. In regards to the priority/timing, blue indicates a medium priority.

Strategy	Priority/ Timing	Key Stakeholder Roles	Potential Measures of Success	Comparable Case Study
Uphold policies and programs which promote sustainability and preservation of historical, cultural, and environmental assets	●	VA Dept of Historic Resources, DEQ, Preservation Virginia, Virginia Historical Society, DCR, Virginia Green, DHCD, VTC, DGIF, VA Marine Resources Commission, VA Dept of Forestry	Number of protection efforts for historic, cultural, and natural assets Number of beautification efforts Number of quality of life studies completed Number of green certifications (Virginia Green, LEED)	Historic Preservation Ordinance, Boulder, Colorado

Policies - Preservation

Strategy) Uphold policies and programs which promote sustainability and preservation of historical, cultural, and environmental assets

Virginia has established a number of policies and programs, such as those under Sections § 58.1-339.2 and §§ 10.1-2202 of Virginia Code, intended to preserve the Commonwealth's rich history and culture, protect its lands, and respect its environment. Sustainable, strategic tourism development through policy and planning is critical. These preservation policies and programs that cover historical, cultural, and environmental assets should be continued.

Virginia Department of Historic Resources and Preservation Virginia offer state tax credits available for owner-occupied and income-producing buildings that are a dollar-for-dollar reduction in the tax liability for rehabilitating historic buildings. Preservation Virginia offers a Revolving Fund Program that is dedicated to saving endangered historic property. Other policies include easements, loans, enterprise zones, and facade or whole building initiatives, which are intended to preserve historical aesthetic, community character, and sense of place. These policies and programs are important for the redevelopment and revitalization of town/city centers.

DCR offers various grants and tax credits for natural assets, including the Virginia Land Conservation Fund, Virginia Open-Space Lands Preservation Trust Fund, Land and Water Conservation Fund, Virginia Recreational Trails Fund, American Battlefield Protection Program, and Civil War Battlefield Acquisition Grants. The Virginia Land Conservation Fund is intended to conserve certain categories of land including open spaces and parks, natural areas, historic areas, and farmland and forest preservation.

As part of encouraging sustainability, the Virginia Green program was specifically developed to reduce environmental impacts **of the tourism industry**. **Virginia's certifications, in tandem** with international LEED certifications, should be encouraged for new tourism developments.

Priority/Timing: Medium

Key Stakeholder Roles: VA Dept of Historic Resources, DEQ, Preservation Virginia, Virginia Historical Society, DCR, Virginia Green, DHCD, VTC, DGIF, VA Marine Resources Commission, VA Dept of Forestry

Potential Measures of Success:

- Number of protection efforts for historic, cultural, and natural assets
- Number of beautification efforts
- Number of quality of life studies completed
- Number of green certifications (Virginia Green, LEED)

Example Destination:

- National: Historic Preservation Ordinance, Boulder, Colorado
 - In 1974, Boulder Historic Preservation Ordinance was passed, which was a grassroots effort aimed at legally protecting the city's many historic places
 - The ordinance has four areas of focus
 - Boulder was one of the first cities in Colorado with the authority to designate and prevent the demolition or destruction of historic, architectural, and cultural resources considered valuable to the community. Today, more than 30 communities in Colorado have a similar historic preservation ordinance, many of which are based on Boulder's model.

Actions:

- Maintain policies and incentives for protection of historical and natural assets
- Continue and encourage beautification policies in conjunction with land and historic preservation efforts for aesthetic improvements and increase in resident quality of life. Explore engaging in quality of life studies related to preservation and sustainability efforts.
- Promote Virginia Green certifications for tourism businesses as well as LEED certifications

Potential Success Factors:

- Continued support from tourism industry stakeholders and residents for preservation
- Ensuring funding sources and sufficient funding levels available for protection programs

Transmittal Letter



March 29, 2013

Mr. Chris Canfield
Vice President of Partnership Marketing
Virginia Tourism Corporation
901 E. Byrd Street
Richmond, Virginia 23219

Dear Mr. Canfield:

PricewaterhouseCoopers LLP ("PwC") has performed certain services to assist the Virginia Tourism Corporation ("Client", "you", or "VTC") in developing a statewide tourism plan for the Commonwealth of Virginia. Our services were performed and this Deliverable (which is hereafter referred to as "Report") was developed in accordance with our engagement letter dated October 12, 2011 and are subject to the terms and conditions included herein. Our services were performed in accordance with Standards for Consulting Services established by the American Institute of Certified Public Accountants ("AICPA"). The procedures we performed did not constitute an examination or a review in accordance with generally accepted auditing standards or attestation standards. Accordingly, we provide no opinion, attestation or other form of assurance with respect to our work or the information upon which our work was based. We did not audit or otherwise verify the information supplied to us in connection with this engagement, from whatever source, except as may be specified in this Report.

Our work was limited to the specific procedures and analysis described herein and was based only on the information made available through September 15, 2012. Accordingly, changes in circumstances after this date could affect the findings outlined in this Report.

This Report has been prepared pursuant to an engagement between PwC and its Client. As to all other parties, it is for general information purposes only, and should not be used as a substitute for consultation with professional advisors.

We appreciate the opportunity to assist you with this matter.

Very truly yours,

PricewaterhouseCoopers LLP

