



VIRGINIA
IS FOR
LOVERS®

Statewide Strategic
Tourism Plan

2026 – 2029

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**New Virginia Piedmont region effective January 1, 2027. Regional plan will be included in future editions of STP.*

 Massanutten Resort - Ridge Trail

EXECUTIVE SUMMARY

Virginia's tourism industry is a powerful economic engine for the Commonwealth, generating billions in visitor spending, supporting hundreds of thousands of jobs, and producing meaningful tax revenue at the state and local levels. Yet neighboring states are investing aggressively to grow their own market share, and traveler expectations continue to shift. This plan provides the strategic framework Virginia needs to sharpen its competitive edge, grow visitation, extend visitor length of stay, and increase spending across all 10 tourism regions.

This plan is the result of extensive research across the Commonwealth. Hunden Partners engaged more than 2,000 stakeholders across all 10 regions through workshops, focus groups, surveys, and in market site visits. Additionally, a detailed quantitative analysis of approximately 900 points of interest was conducted to understand each region's current tourism product positioning. This plan identifies what Virginia does well and where critical gaps remain.

The findings point to consistent statewide needs: expanded lodging options with more full-service and boutique hotel options, more family-friendly attractions, improved outdoor recreation access and amenities, and tournament-caliber sports infrastructure to capture a fast-growing market.

SUMMARY OF RECOMMENDATIONS

To act on these findings, the plan recommends three statewide priorities:

- 1 Add new and enhance existing funding mechanisms to incentivize catalytic tourism product development at scale.**
- 2 Target tourism product development investment guided by each region's specific strengths and gaps.**
- 3 Create stronger connectivity across jurisdictions, regional partners, and VTC programs to ensure coordinated execution.**

The pages that follow detail the methodology, statewide analysis, and region-by-region plans that bring this strategy to life.

STATEWIDE OVERVIEW

Plan Goals

The goal of the Virginia Tourism Corporation (VTC) Statewide Strategic Tourism Plan (STP) is to design a strategy that will guide Virginia's tourism growth, sharpen the Commonwealth's competitive edge and increase both visitation and traveler spending over the next three years.

The Plan identifies strategies to extend traveler length of stay by highlighting unique attractions to increase Virginia's competitiveness, and support economic development throughout Virginia's ten (10) tourism regions. This regional approach will further enhance visitor experiences, increase visitor spending, and strengthen the overall appeal of the Commonwealth.

The following components are executed region by region in subsequent regional plans:

EXISTING PRODUCT PROMOTION

Evaluates each region's top Points of Interest (POIs) and assesses how well existing assets align with traveler preferences and competitive destinations.

FUTURE PRODUCT DEVELOPMENT

Analyzes competitive gaps, recommends new products or enhancements, and identifies each region's direction for the next three years.

EXECUTION RECOMMENDATIONS & STRATEGY

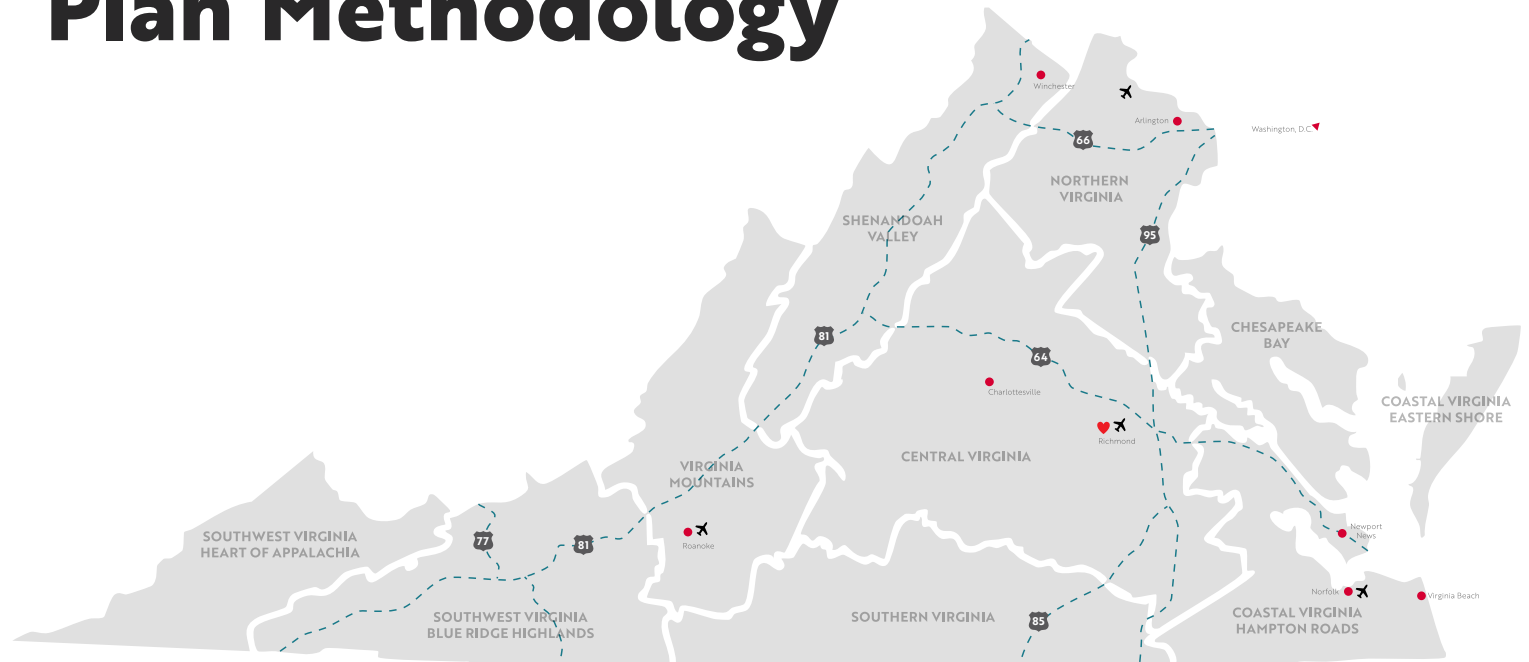
Outlines priority projects and funding opportunities, ranks initiatives with the greatest statewide and regional impact, and provides a tactical roadmap for recommendation implementation.

The above components were completed through a detailed statewide process and comprehensive methodology that included stakeholder input through interviews, focus groups, survey responses as well as detailed market research on existing product, target markets, and more, to ultimately recommend regional strategies for increasing competitiveness throughout the Commonwealth's tourism ecosystem.

VTC has a mission to expand domestic and international in-bound travel and motion picture production to generate revenue and employment in Virginia. This Plan furthers that mission through the commitment to drive visitation into and across the Commonwealth through regional strategies for product promotion and new product development.

VTC engaged Hunden Partners (Hunden) to facilitate the planning process across all 10 tourism regions beginning in early 2025. Hunden is the leading destination development consulting firm that works with Destination Marketing Organizations (DMOs), local and state governments and related agencies to plan for and support future placemaking initiatives that catalyze communities and grow the tourism ecosystem for good. The STP, developed by Hunden in conjunction with VTC, delivers strategies for implementation to increase returns across the Commonwealth and impact the tourism economy of all 10 regions.

Plan Methodology



Source: VTC

The STP includes a statewide framework as well as 10 unique plans for each of Virginia's tourism regions, as shown above. This framework builds on previous strategic initiatives, including:

- VTC's Statewide Strategic Tourism Plan 2020 - 2025: DRIVE 2.0,
- VTC's lure/hub-and-spoke model

This STP furthers prior efforts by applying Hunden's proprietary Pillars of Place analysis for data-driven insights into promotion and product development opportunities. The Pillars of Place analysis provides a graded assessment of each region's existing lures, hubs, and spokes to identify gaps and opportunities that enhance the regions through tourism product development.

In addition to the Pillars of Place analysis, the research process included comprehensive stakeholder engagement across all 10 regions. Hunden conducted in-person stakeholder meetings, focus groups, steering committees, and a regional survey. The findings from Hunden's engagement, research, and analysis inform the three-year tactical strategy, which balances statewide priorities with actionable steps for all tourism regions.

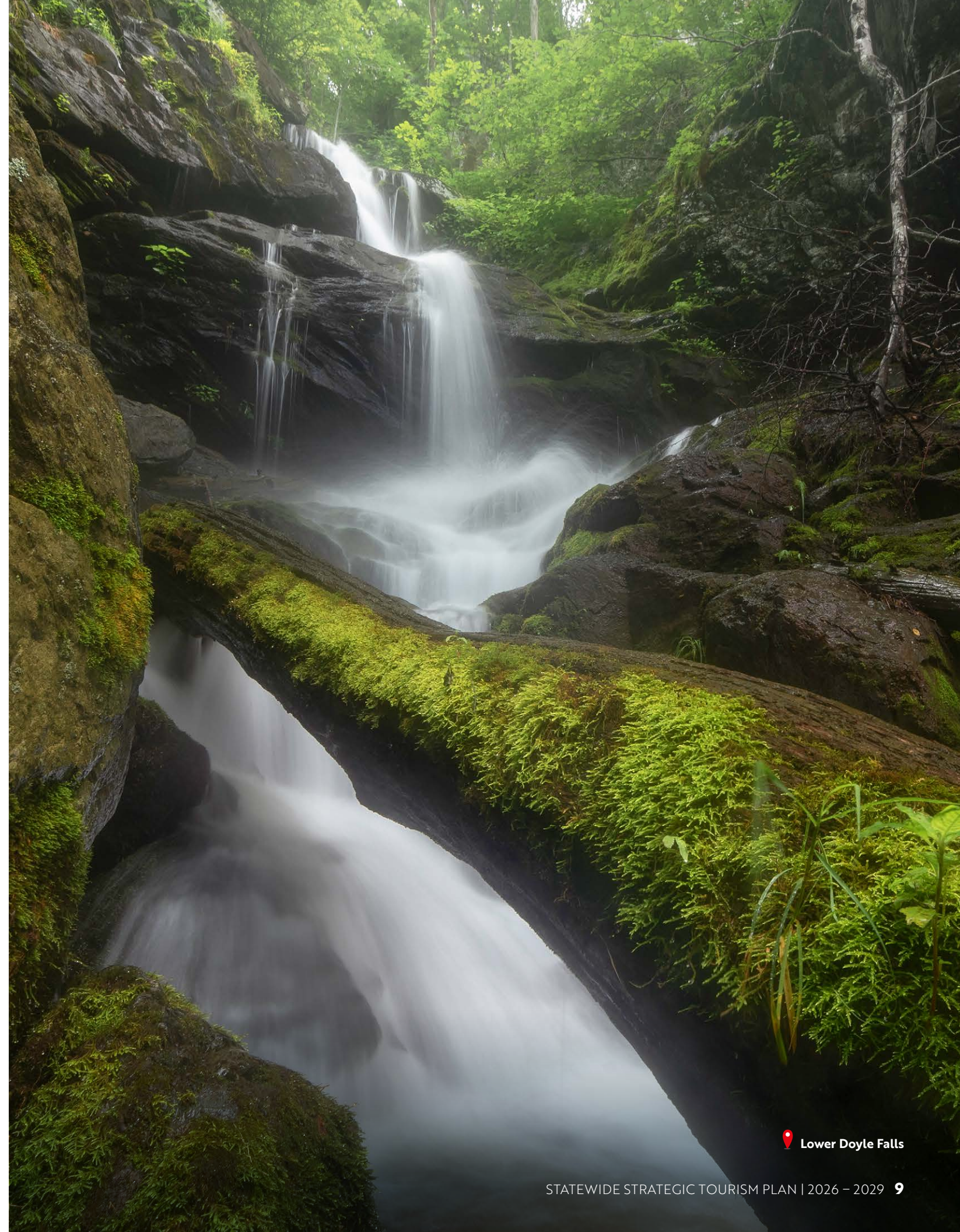
COMPONENTS OF THE STP:

QUALITATIVE

- Stakeholder engagement – regional and state-level stakeholders
- Case studies input
- Analysis of trends
- Strengths, Weaknesses, Opportunities, Threats (SWOT) by region
- Competitive and comparable case studies in the Commonwealth
- Competitor research

QUANTITATIVE

- Pillars of Place research
- Stakeholder survey
- Audience research and travel data



Lower Doyle Falls

Stakeholder Engagement

Throughout the research process, Hunden Partners had more than 2,000 stakeholder touchpoints across the Commonwealth. The engagement process included more than 235 virtual and in-person workshops, engaged more than 700 stakeholders in person, received 1,167 survey responses to the statewide Stakeholder Engagement Survey, and visited more than 450 Points of Interest (POI)s across Virginia.

As part of this comprehensive engagement, Regional Steering Committees were created to engage and guide the planning process. These Regional Steering Committees met three times during the research

process: (1) At the beginning to guide the process and provide input on the region's current positioning, (2) at the Project midpoint/after initial product analysis was concluded and recommendations were being formed, and (3) once draft recommendations were drawn prior to the conclusion of the process. These meetings served as integral touchpoints to gain feedback on the methodology and findings of Hunden's Pillars of Place analysis. Furthermore, Hunden met with regional Focus Groups, using contacts provided by VTC and the Steering Committees to provide feedback and help form key regional themes.

A SUMMARY OF HUNDEN'S STAKEHOLDER ENGAGEMENT PROCESS ACROSS ALL 10 REGIONS IS AS FOLLOWS:

2,000

Stakeholder touchpoints across the Commonwealth

This industry and stakeholder engagement was a cornerstone of the planning process. Feedback from stakeholders guided the outcomes and ensured alignment with regional product needs. Key stakeholder themes are included in both the Statewide Opportunities section as well as each regional section of this Plan.

1,167

Survey Responses

180

In-Person Meetings

450

POIs Visited

15

Site Visits to Regions

30

Virtual Steering Committee Meetings

235

Virtual and/or In-Person Focus Group Meetings

700

Individual Stakeholders Engaged



View of Buggs Island Lake

Pillars of Place

The Pillars of Place analysis is a quantitative framework used to assess a destination’s existing assets and identify strengths and potential gaps. The analysis is based on Points of Interest selected by VTC in conjunction with local stakeholders.

VTC currently tracks approximately 900 active POIs statewide, an industry-leading dataset used in partnership with Symphony and Tourism Economics for research and marketing applications. These POIs serve as indicators of tourism activity rather than an exhaustive inventory of all tourism-related assets.

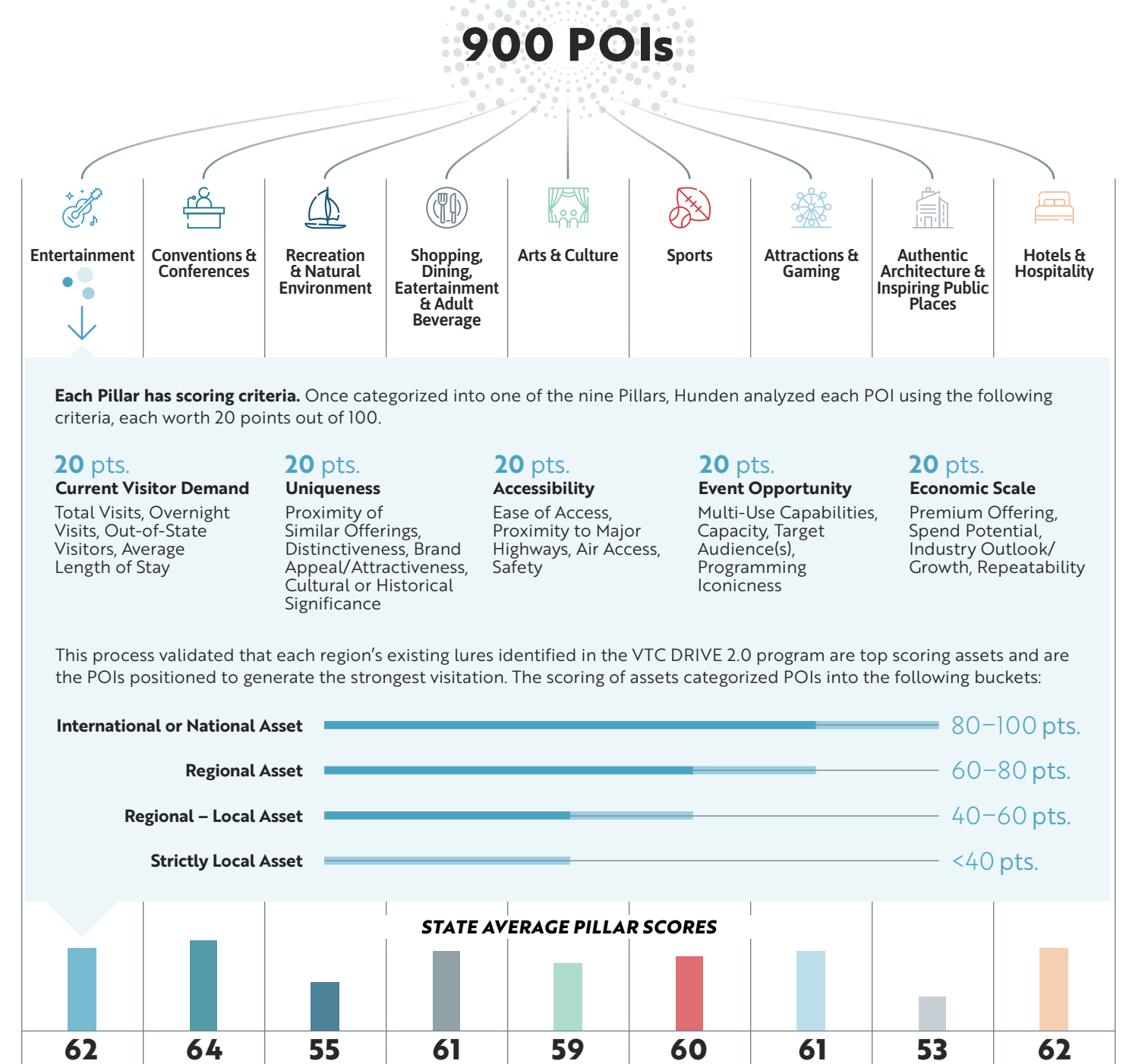
Hunden applied a proprietary scoring methodology to all POIs provided by VTC to evaluate regional asset performance and determine each region’s current positioning. POIs were then categorized into Hunden’s Pillars of Place, grouping similar asset types to ensure consistency across regions while allowing for regional nuance informed by stakeholder input.

For example, attractions and gaming assets include venues such as Caesars Virginia, Virginia International Raceway, Kings Dominion, and the Metro Richmond Zoo. Entertainment assets include venues such as Jiffy Lube Live, Wolf Trap National Park for the Performing Arts, and the American Shakespeare Center’s Blackfriars Playhouse. Colleges and universities were generally categorized under Arts and Culture unless a facility functioned primarily as a tourism-driving sports or entertainment venue, such as John Paul Jones Arena at the University of Virginia.

PILLARS OF PLACE

- Entertainment
- Conventions & Conferences
- Recreation & Natural Environment
- Shopping, Dining, Entertainment & Adult Beverage
- Arts & Culture
- Sports
- Attractions & Gaming
- Authentic Architecture & Inspiring Public Places
- Hotels & Hospitality

PROCESS FOR POI ANALYSIS



All POI scores roll up to a regional pillar score, which creates a scoring matrix. This matrix helps identify supply, demand, and product gaps as well as which regions need certain product.

THE GOALS OF THIS PROCESS ARE TO:

CRAFT REGIONAL IMPLICATIONS ON EXISTING PRODUCT → **IDENTIFY STRONGEST ASSETS FOR VISITOR ATTRACTION** → **IDENTIFY GAPS IN PRODUCT**

The Pillars of Place analysis was conducted on the regional level with more detail on the outcomes and subsequent product recommendations in each respective regional plan.

Industry Trends

Planning for the future requires an understanding of key trends. As VTC looks to grow tourism impacts these trends will identify opportunities to capitalize in key areas of product and experience development. The following section includes top trends and examples relevant to Virginia’s tourism economy over the next three years. Additional trends were considered and are included in the appendix.

| TREND | BEST PRACTICE EXAMPLE | OVERVIEW | VA IMPLICATION |
|--|--|--|--|
| "Quiet Luxury" | <ol style="list-style-type: none"> 1. Grand Bohemian Lodge (Autograph Collection) – a design-forward, boutique property where luxury is expressed through craftsmanship, setting, and service rather than overt branding. <i>Example: Greenville, SC.</i> 2. Relais & Châteaux restaurants – chef-led, small-scale dining experiences emphasizing provenance, storytelling, and exceptional service. <i>Example: The Saloon at Dunton Hot Springs, Dolores, CO.</i> 3. Aman Resorts – known for privacy, serenity, and highly personalized service in secluded, destination-driven settings. <i>Example: Amangani Jackson Hole, WY.</i> | <p>This trend reflects a shift toward understated, experience-led luxury. Travelers are prioritizing privacy, personalization, and authenticity over conspicuous consumption. Demand remains strong where luxury feels meaningful and tailored rather than performative.</p> | <p>Strong potential for boutique resort development, wellness-oriented lodging, and premium food experiences that can capture longer, higher-spend stays across Virginia.</p> |
| Solo Travel | <ol style="list-style-type: none"> 1. Intrepid Travel’s solo-only tours – purpose-built itineraries for solo travelers seeking independence with built-in community. 2. Priceline’s “Solo Explorer” promotions – demonstrates how OTAs are actively targeting and packaging solo travel demand. 3. Solo-focused tour operators expanding in the U.S. – signals the scale and maturity of the solo travel segment. | <p>Solo travel continues to grow as travelers seek flexibility, autonomy, and shorter, experience-rich trips. Many solo travelers are also opting into small-group departures, creating a hybrid model that balances independence with social connection.</p> | <p>Virginia’s Singles and Starters segment aligns strongly with this trend. Destinations can respond with easy-to-book micro-itineraries, small-group guided experiences, and safe, social activities that still preserve a sense of independence.</p> |
| Adventure Tourism on the Rise | <ol style="list-style-type: none"> 1. Recreational kayaking and watersports showing strong growth, particularly in urban-adjacent areas. 2. Moab, UT expanding outfitters offering packaged rentals and guided experiences that reduce barriers to entry. 3. National Park Service reporting a record 331.9 million recreation visits across more than 400 sites in 2024. | <p>Adventure tourism continues to attract travelers seeking exploration, immersion in nature, and active experiences that provide a break from routine. Nature, adventure, and active travel now represent a substantial share of global tourism spending.</p> | <p>Virginia’s extensive outdoor recreation assets position the Commonwealth well. Creating clustered outdoor recreation zones and linking them with hospitality and entertainment nodes can extend stays. Expanding outfitters and guide services will help make adventure more accessible and bookable.</p> |
| Authentic Local Cultural Interest | <ol style="list-style-type: none"> 1. Airbnb integrating bookable local services and experiences alongside accommodations, enabling easier access to local guides, chefs, and makers. 2. Lake Charles, LA culinary storytelling – using signature dishes and local food identity to connect visitors with place. 3. People-First Tourism (Raleigh, NC) – centering resident voices, local businesses, and community benefit in tourism development. | <p>Travelers increasingly seek meaningful connections to local culture, prioritizing experiences that support small businesses and offer a deeper sense of place. Cultural immersion and learning have become core motivators, particularly among younger travelers.</p> | <p>Virginia’s history, heritage, and local culture are strong differentiators. Emphasizing authentic storytelling, immersive learning, and locally rooted experiences can give visitors a deeper sense of meaning and long-term connection to place.</p> |

| TREND | BEST PRACTICE EXAMPLE | OVERVIEW | VA IMPLICATION |
|---|--|--|---|
| "Town-Sizing" & the Value-Seeking Traveler | <ol style="list-style-type: none"> 1. New Hope, PA & Lambertville, NJ for walkable downtowns, antiques, and riverfront settings. 2. Ouray, CO for outdoor recreation paired with hot springs and small-town character. 3. Bentonville, AR for world-class outdoor recreation combined with strong cultural amenities. | <p>Travelers are increasingly choosing smaller towns over large cities, seeking a slower pace, distinctive character, and better overall value. These destinations often support longer stays, shorter planning windows, and more memorable experiences.</p> | <p>Virginia’s small towns are well positioned to capitalize on this trend. Shared-economy accommodations and experience-based offerings can fill lodging gaps, attract value-conscious travelers, and support local economic development.</p> |
| Technology Driving Bookings | <ol style="list-style-type: none"> 1. AI-powered trip-planning chat tools enabling conversational, personalized itinerary building. 2. AI-integrated travel search platforms that allow travelers to plan complete trips by asking questions rather than navigating filters. 3. Flexible payment and “Buy Now, Pay Later” options increasingly offered at checkout for travel and event bookings. | <p>Travel planning and booking are increasingly shaped by AI-assisted discovery and frictionless checkout. Travelers expect fast answers, personalized recommendations, and payment flexibility that lowers upfront cost barriers and accelerates decision-making.</p> | <p>Virginia businesses and DMOs must remain discoverable and bookable across emerging digital platforms. Clear content, mobile-first design, itinerary-ready products, and flexible payment options will be critical to reaching next-generation travelers.</p> |
| Road Trips and Regional Travel Persist | <ol style="list-style-type: none"> 1. The quintessential California road trip experience. 2. Route 66 Centennial-themed travel experiences. 3. The Blue Ridge Parkway, a long-established Virginia asset. | <p>Domestic travel continues to dominate U.S. tourism spending, with road trips remaining one of the most popular, affordable, and flexible ways to explore destinations—particularly for short-notice and value-driven trips.</p> | <p>Virginia is well positioned as a drive market from Washington, D.C., Philadelphia, and Charlotte. Leveraging scenic byways, hub-and-spoke itineraries, and regional routes can extend stays and encourage broader exploration across the Commonwealth.</p> |
| Experiences Drive Destination Choice | <ol style="list-style-type: none"> 1. Multigenerational travel destinations such as Outer Banks, NC and Hilton Head, SC. 2. All-inclusive experiential resorts like Mohonk Mountain House, NY. 3. Themed experience trails such as the Kentucky Bourbon Trail. | <p>Travelers increasingly select destinations based on the breadth and quality of experiences available. A strong mix of guided and unguided activities, paired with nearby lodging and dining, encourages longer stays and repeat visitation.</p> | <p>Virginia’s diverse experiences—from wine and seafood to outdoor recreation and heritage—position the state well for experience-driven itineraries that appeal to multigenerational and interest-based travel markets.</p> |
| Travel Planning Windows are Getting Shorter | <ol style="list-style-type: none"> 1. Vacations by Marriott last-minute deals offering time-sensitive discounts. 2. American Airlines featured and last-minute fare promotions targeting near-term travel decisions. 3. Last-minute hotel booking platforms designed for same-day or next-day stays. | <p>Travelers are increasingly making decisions closer to departure, and brands are responding with limited-time pricing, featured inventory, and urgency-based offers. Shorter planning windows now influence seasonal, event-based, and leisure travel patterns.</p> | <p>Virginia’s proximity to major drive markets provides a competitive advantage. Marketing quick-turn getaways, seasonal activations, and last-minute itineraries can help capture near-term demand and convert undecided travelers.</p> |

Target Audiences

The STP's focus on extending length of stay and increasing traveler spending to further the impact of the tourism economy means the visitor has to be a match for the experiences offered across the Commonwealth. Currently, VTC has three visitor personas based on research created from the state's agency of record:

OUTDOOR EXCURSIONIST

■ Motivated by destinations and trips that provide adventurous and explorative experiences while allowing them to get away from everyday stress. Inhibited by the fact that they have lower incomes and take fewer trips per year compared to other audiences. These visitors need destinations that offer a variety of outdoor experiences at an affordable cost and the ability to disconnect and take things at a leisurely pace while enjoying the outdoors."

URBAN EXPLORERS

■ Motivated by destinations and trips that have unique urban offerings, culture, and a creative spirit in the destination they are visiting. Inhibited by the fact that they take fewer trips per year and are less interested in remote areas. These visitors need destinations that offer a rich urban experience with other amenities that are easily accessible and provide the ability to learn more about the destination as they immerse themselves in the destination they are visiting."

TRAVEL & ACTIVITY ENTHUSIASTS

■ Motivated by enriching leisure trips that allow them to experience a wide variety of activities and locations over a longer trip. Inhibited by trips with selective offerings or challenged to locate family friendly accommodations. These visitors need destinations that offer an abundance of activities and things to do and authentic, adventurous experiences that create memories that last a lifetime."

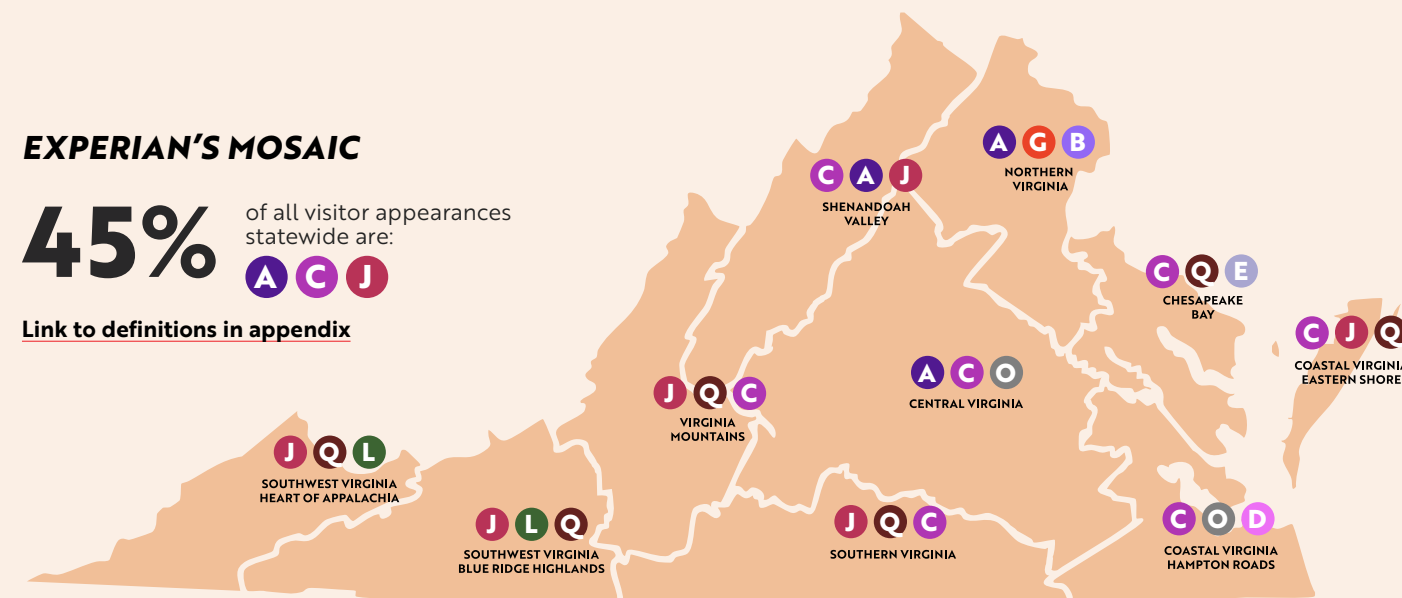
Sharp Top Mountain

EXPERIAN'S MOSAIC

45% of all visitor appearances statewide are:



[Link to definitions in appendix](#)



Capturing the dual character of the state's visitor base: affluent, educated professionals alongside older, settled retirees.

Visitor economy driven by high-income earners and older households who prioritize cultural, leisure, and travel experiences over routine consumption. [Link to definitions in appendix](#)



Shenandoah Valley
Central Virginia



Heart of Appalachia
Blue Ridge Highlands



Virginia Mountains
Southern Virginia
Coastal Virginia Eastern Shore



[Scan for Segment Definitions](#)



Hampton Roads



Chesapeake Bay



Northern Virginia

TOURISM PRODUCT ATTRACTS KEY SEGMENTS

These statewide personas as well as the additional segmentation research align well with the existing product across the Commonwealth and within each region. The categories of POIs created during the Pillars of Place analysis found that 25 percent of the POIs studied fall into the Authentic Architecture and Public Spaces, which includes many of the local downtowns and main streets and showcases the cultural exchange experienced across Virginia's communities.

The next highest concentration of POIs studied include Recreation and Natural Environment. Virginia's rich natural resources and abundant outdoor experiences including hiking trails, scenic viewpoints, rafting, paddle sports, and more make Virginia an incredible destination for those seeking everything from relaxing outdoor experiences to active adventure. The third most concentrated Pillar includes POIs in the Shopping/Dining and Adult Beverage experiences. This speaks to Virginia's rich culture and heritage in wine production, boutique shopping, and culinary experiences. The concentration of assets in these Pillars aligns well with existing personas across the Commonwealth.

THESE AUDIENCES AND PERSONAS SHOULD BE FURTHER TARGETED TO EXPAND ON VIRGINIA'S STRONG PERFORMANCE IN THESE CATEGORIES AS ALL THE 10 REGIONS ARE REPRESENTED WITH EXISTING PRODUCT THAT FITS THESE VISITOR PERSONAS AND PROFILES.

Competition

Virginia is an incredibly diverse state with a range of tourism and hospitality offerings ranging from national parks and byways, history, culture, heritage, outdoor recreation, and nationally recognized sites, venues, and attractions. This diverse landscape of assets and amenities along with a globally recognized brand in Virginia is for Lovers makes the entire Commonwealth a great place to visit for a multitude of reasons.

Because of this diversity in offerings, Virginia attracts a range of visitor types. As mentioned previously, VTC has three primary target personas, the Outdoor Excursionist, Urban Explorer, and Travel and Activity Enthusiast, which competitive states are also interested in targeting. These personas represent the statewide attributes that make a traveler interested in Virginia's

tourism experiences. According to research conducted by VTC, visitors to Virginia are likely to be well educated couples and families, with the majority having a college or post college degree. At the regional level, there is more nuance based on the specific localities' offerings. Leisure travelers' interests range across arts and culture, beach, outdoor recreation, foodies, entertainment, music, wine, and more. More detail on this will be explained in each regional plan.

To understand how VTC and the regions can capture more market share and increase the impacts of the tourism ecosystem across the state, this plan looked not only at the assets across the Commonwealth, but also how Virginia's tourism product compares to neighboring, competitive states.

Using Tripadvisor's aggregation of state-by-state attractions rated three stars or higher, Hunden compared product volume to the landscape in the Commonwealth. In order to compare quality product across all competitive states, only listings of 3 stars or higher were screened. Virginia was compared to North Carolina, Pennsylvania, Tennessee, West Virginia, and Kentucky, regional peers with overlapping visitor markets. This table offers a statewide snapshot of Virginia's inventory of assets and amenities, beyond the POIs tracked, compared to its competitive neighboring states based on TripAdvisor's inventory and user generated rating scales. While this table showcases the state-level comparisons, regional sections of the analysis further refine comparisons at a local level.

Virginia's nearly 5,000 attractions place it above most regional peers and well ahead of smaller states like West Virginia and Kentucky, though still short of North Carolina's larger inventory. Its balanced mix across major categories such as Nature & Parks, Sights & Landmarks, and Museums provide broad appeal and a strong foundation for both leisure and cultural tourism. However, this balance also means Virginia does not dominate in any one area.

Additionally, states like West Virginia and Kentucky have recently made significant investments in tourism product development and plan to continue such investments to grow the tourism economy and its impact. Kentucky leverages legislation for tourism product development to incentivize new private sector development, while West Virginia's Department of Tourism has a similar tourism development incentive. More detail on these programs is in the Competition Investment Case Studies section. Both states are making a push to capture more market share through product development efforts, which presents a threat to Virginia's current market share positioning.

To strengthen its competitiveness, the state could focus on growing products that drive repeat visitation and longer stays, such as amusement attractions, meeting space, sports complexes, nightlife, and other unique activities and experiences. Pairing these attractions with continued investment in Virginia's natural and historic strengths would allow the state to maintain its market share and grow visitation and continued spending.



Cape Charles LOVEwork

STATE COMPETITION: TOTAL ATTRACTIONS & KEY CATEGORIES

| | Total Attractions | Nature & parks | Sights & Landmarks | Fun & Games | Museums | Spas & Wellness | Boat Tours & Water Sports | Nightlife | Classes & Workshops | Water & Amusement Parks | Zoos & Aquariums | Casinos & Gambling |
|-----------------|-------------------|----------------|--------------------|-------------|------------|-----------------|---------------------------|------------|---------------------|-------------------------|------------------|--------------------|
| Virginia | 4,933 | 642 | 781 | 491 | 480 | 265 | 215 | 176 | 100 | 30 | 15 | 7 |
| North Carolina | 6,971 | 922 | 719 | 709 | 585 | 400 | 601 | 484 | 222 | 38 | 31 | 4 |
| Pennsylvania | 6,353 | 752 | 1043 | 698 | 602 | 265 | 134 | 634 | 157 | 47 | 20 | 16 |
| Tennessee | 4,396 | 604 | 581 | 501 | 321 | 170 | 195 | 282 | 118 | 51 | 14 | 0 |
| West Virginia | 1,108 | 215 | 211 | 82 | 125 | 46 | 31 | 46 | 17 | 6 | 4 | 6 |
| Kentucky | 2,049 | 297 | 350 | 189 | 200 | 62 | 45 | 147 | 37 | 19 | 6 | 8 |
| Average | 4,302 | 572 | 614 | 445 | 386 | 201 | 204 | 295 | 109 | 32 | 15 | 7 |

Source: Tripadvisor

Competitor Investment Case Studies



KENTUCKY TOURISM DEVELOPMENT ACT (KTDA)

The Kentucky Tourism Development Act is one of the most established models for incentivizing private tourism investment in the United States. The program has helped catalyze bourbon tourism destinations, museum expansions, and unique resort properties across the state, strengthening Kentucky's brand identity. **The KTDA program has incentivized product development, resulting in more than \$601M across 29 projects. The total incentives are valued at \$150M in sales tax, of which \$56.8M has already been recovered.**

This program allows developers of approved tourism projects, such as attractions, hotels, entertainment complexes, and resorts, to recover up to 25 percent of eligible project costs through a rebate of state sales tax generated by the project over a ten-year period. If the project is on state-owned land the rebate is potentially up to 50 percent. This performance-based structure ensures the state only provides funding as the attraction succeeds, while also reducing upfront financial risk for developers. As a competitive state for tourism market share, Kentucky is an emerging performer.

Virginia has an existing Tourism Development Financing Program (TDFP) intended to serve as gap funding in rebate form. In the current TDFP hotels are primarily funded and the locality is the applicant; however, Virginia could benefit from a similar mechanism. Virginia should consider a new mechanism with this program as a reference point.



WEST VIRGINIA OFFICE/ SECRETARY OF TOURISM

West Virginia elevated tourism by creating a cabinet-level Secretary of Tourism position with substantial funding authority. The office oversees not only statewide marketing but also direct investment in product development through bonding authority and dedicated state appropriations. This has enabled West Virginia to expand lodging and recreation infrastructure, enhance marketing reach, and prioritize tourism as a pillar of economic growth. By aligning tourism strategy with financing capabilities at the highest level of state government, the program ensures continuity and political visibility. Similar to Kentucky, West Virginia is an emerging performer.

Additionally, West Virginia has a new "Governor's School for Tourism" which was announced by Governor Justice in 2024. This is a first of its kind program that will function as a traveling classroom for high school students to get a behind-the-scenes look at what keeps the tourism economy running across the state. The curriculum and educational components will be led by West Virginia University's Hardy Family Hospitality and Tourism Management program within the John Chambers College of Business. This is a unique partnership to lift the tourism and hospitality sector and build a pipeline for future talent.

Virginia may draw lessons from this model by considering whether VTC should have enhanced bonding capacity or statutory funding authority to directly catalyze new physical tourism assets across its regions. Additionally, Virginia could learn from the workforce education and development program to build a future pipeline of tourism and hospitality industry professionals for the next generation.



TENNESSEE DEPARTMENT OF TOURIST DEVELOPMENT (TDTD)

Tennessee's Department of Tourist Development (TDTD) administers direct grant programs that fund tourism product development at the community level. The flagship **Tourism Enhancement Grant** awards up to \$100,000 per project to non-profits and local government entities for the creation or expansion of public-facing attractions, facilities, and events. In November 2025, Tennessee awarded more than \$2 million across 30 communities in a single round, funding stages, historic preservation, ADA upgrades, and visitor-serving infrastructure.

The **Tennessee Special Event Fund** provides a competitive incentive for securing major events capable of generating \$10 million or more in direct economic impact or \$1 million in state and local tax revenue, giving Tennessee a strategic edge for high-profile national events. The **Regional Tourism Grant** supports development of regional promotion plans, strengthening coordination among DMOs and localities statewide.

Virginia could draw lessons from Tennessee's layered approach. Virginia's Special Events & Festivals Grant mirrors the Special Event Fund, but Tennessee's \$10M+ impact threshold reflects a more aggressive commitment to major event attraction. More critically, Virginia lacks an equivalent to the Tourism Enhancement Grant, which targets physical product development rather than marketing. A comparable mechanism — expanding the TDFP or establishing a new stand-alone grant — would fill a key gap in Virginia's local tourism infrastructure investment across all 10 regions.



NORTH CAROLINA/VISIT NC

Visit North Carolina is the state's official destination marketing organization and part of the Economic Development Partnership of North Carolina. The mission is to unify and lead the state in positioning North Carolina as a preferred destination for travelers, sporting events, and film production and in maximizing economic vitality statewide. North Carolina started a program in 2023 to attract major events to spur the tourism economy. The Major Events, Games, and Attractions Fund was established by the North Carolina General Assembly to stimulate economic activity by attracting events that can, in turn, attract out-of-state visitors to North Carolina, strengthening the state's travel and tourism industry.

Events are a critical aspect of tourism. This kind of fund enables North Carolina localities to offset costs and invest in new and grow existing events to drive visitation into the state. VTC has a Special Events & Festivals Grant program to help with some costs and marketing; however, the North Carolina program is aimed at "major" events targeting professional sports and events with attendance over that exceeds 22,000. Virginia could benefit from a similar mechanism in place to significantly grow events. Stakeholders across the Commonwealth believed in the value of growing event-based tourism.

THESE CASE STUDIES SHOW HOW INVESTMENT IN PRODUCTS, BOTH BUILT AND THE NATURAL ENVIRONMENT, ARE TARGETED TO GROW OFFERINGS AND MAKE THE DESTINATIONS MORE ATTRACTIVE TO VISITORS. THESE PROGRAMS HAVE ALLOWED FOR CATALYTIC DEVELOPMENT AND CONTINUED REINVESTMENT IN THE SECTOR, GENERATING RETURNS FOR DECADES TO COME.

Statewide Recommendations

This Strategic Tourism Plan contains recommendations at the state and regional levels. As stated previously the goal is to attract more visitors, extend stays, increase competitiveness, and capture incremental spending through promotion of current products and new product developments. At the state level there are recommendations to support execution. The following section identifies top priorities in rank order. The detailed recommendations for each region will be contained in the respective regional plans.

Statewide Recommendations: Strategies & Plans for Execution



FUNDING



PRODUCT DEVELOPMENT



CONNECTIVITY



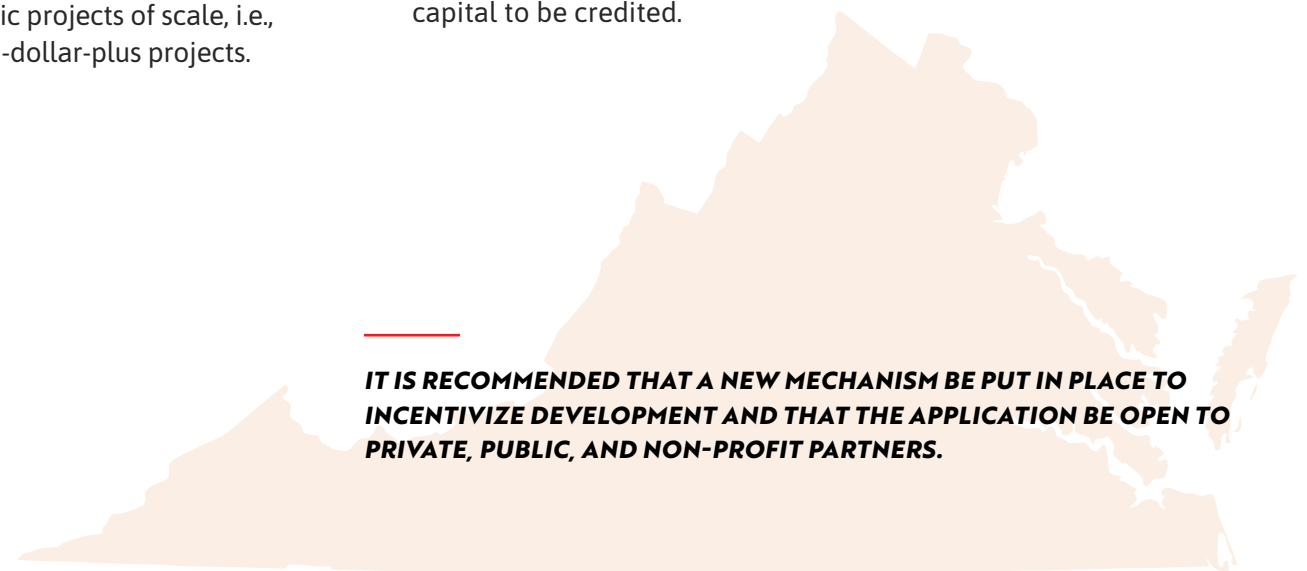
New Point Comfort Natural Area Preserve

Funding

Product Investment Funding – Hunden recommends VTC and its partners at the state level consider developing a program similar to KTDA for product development, expansion, and reinvestment. KTDA uses sales tax refunds as the mechanism for incentive. It would likely require new legislation. It is recommended that new funding mechanisms be open to any kind of tourism product that generates or contributes to hotel tax, sales tax, tourism improvement district taxes, or any other related tourism tax. Currently the TDFP primarily used to develop hotels and current DRIVE Tourism funds are only allocated to DMOs. It is recommended that a new mechanism be put in place to incentivize development and that the application be open to private, public, and non-profit partners.

Steps for execution:

1. VTC and its partners should collaborate with the Virginia Restaurant, Lodging & Travel Association (VRLTA) as the advocacy arm of tourism stakeholders to develop a legislative action plan.
2. Support drafting new legislation similar to KTDA and West Virginia’s new mechanism, with enhancements to include direct funding and potential public sector investments not solely tax credit incentives. It is important to reinforce the scale of the projects coming for an incentive. These are intended to stimulate catalytic projects of scale, i.e., million-dollar-plus projects.
3. Additional partnership with VRLTA on 1398 tax code for VTC to receive funds from OTA collections. The fund has grown roughly 40 percent since the legislation was put in place; however, VTC has not seen its respective portion increase. VRLTA’s legislative priorities could include this opportunity to increase VTC’s funding capacity to reinvest in and market the industry.
4. Leverage existing mechanisms like the Farm Wineries and Vineyards Tax Credit that enables 25 percent of qualified capital to be credited.
5. Similarly, VTC and its partners should further leverage the Agriculture and Forestry Industries Development Fund (AFID) by the VA Department of Agriculture and Consumer Services.
6. Promote VA Main Streets grant programs and opportunities that enable new development and enhancements.



IT IS RECOMMENDED THAT A NEW MECHANISM BE PUT IN PLACE TO INCENTIVIZE DEVELOPMENT AND THAT THE APPLICATION BE OPEN TO PRIVATE, PUBLIC, AND NON-PROFIT PARTNERS.

Statewide Recommendations

Product Development

Statewide product development themes – Across the Commonwealth the need for new and expanded tourism and hospitality product is needed to lift the regions, support increased competitiveness and increase impact on the tourism economy. Each regional plan to follow addresses specific tourism product development opportunities and recommendations based on the Pillars of Place analysis and related market research within each region. Across the Commonwealth there were similar themes for product need. Hunden recommends VTC continue to work with regional partners to further product development.

The following were the most consistent themes related to product development:

- 1. Full-service lodging and boutique hotels** were the most needed product across all 10 regions. This is particularly true in the more rural regions.
- 2. Family friendly attractions** were another consistent opportunity to drive new demand with increased supply. In regions with more craft beverage experiences there was typically a need for more family friendly to round out a family or multigenerational trip. This was also true in regions with more cultural assets and museum experiences. Opportunities for families with kids of various ages needed more hands-on activities.
- 3. Outdoor recreation** is a leading strength across the Commonwealth and in every region, however, things like access points, amenities, trail completion, and guided trips are opportunities to get more out of Virginia's outdoor gems.
- 4. Sports** was also a top theme in many regions as an opportunity market for growth with youth sports tournaments. Some regions needed indoor assets while others needed outdoor fields to compete for regional and national sporting events. Youth sports is a large and continuously growing market. All sports-related investments should be "tournament caliber" in order to capture sports tourism. Additionally, all sports investments should be flexible in order to optimize for multisport use. Regional plans will identify more specifically the type and need.



High Bridge Trail State Park

Connectivity

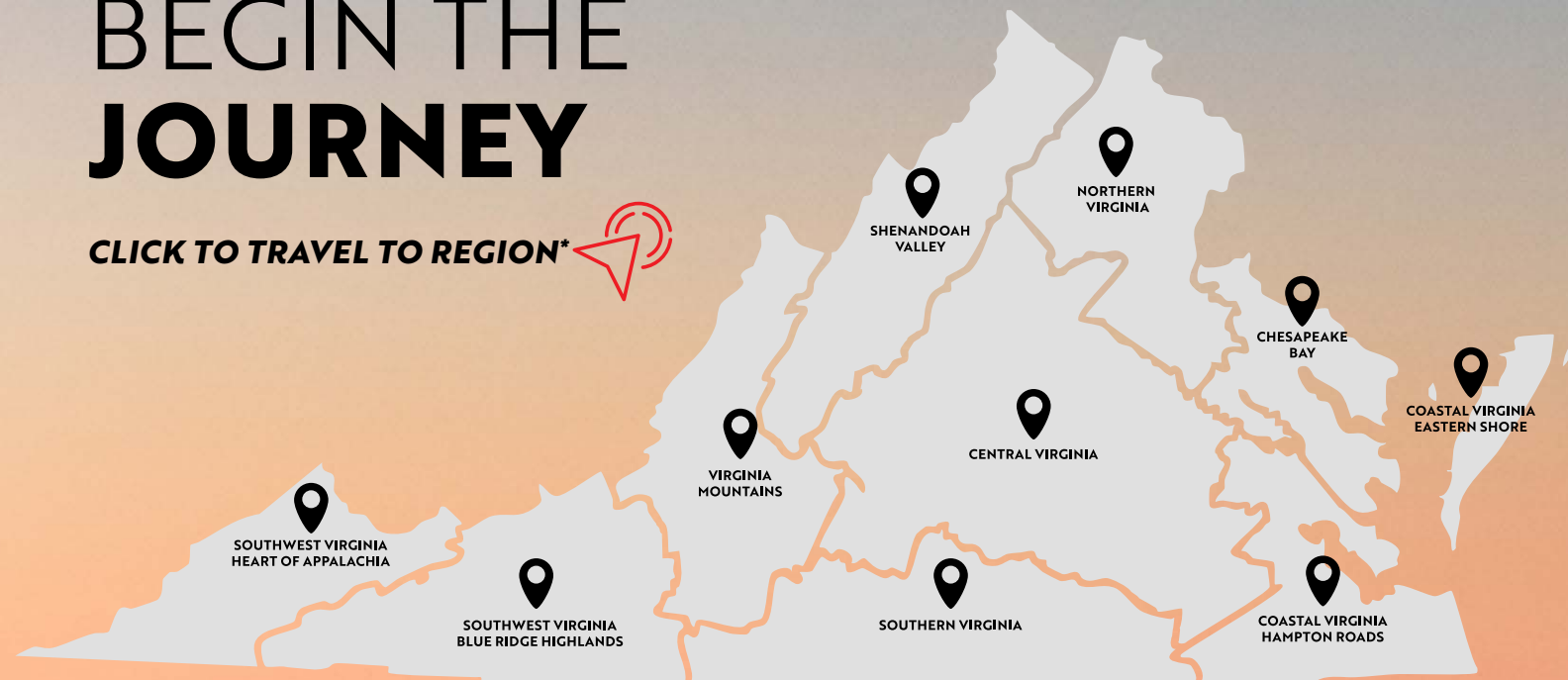
Connectivity at the statewide level is essential to strengthening coordination across Virginia's tourism industry and ensuring effective implementation of this Strategic Tourism Plan. Beyond physical connections between places, connectivity refers to the alignment of partners, regions, programs, and resources that support tourism development and execution. The following strategies focus on improving collaboration across jurisdictions, strengthening regional structures, clarifying roles and coverage, and sustaining industry engagement to better connect stakeholders, prioritize investment, and advance tourism outcomes across the Commonwealth.

Steps for execution:

- 1. Establish targeted tourism development zones.** New and enhanced product development mentioned on previous page, will address some of this, but to go further, Virginia should consider integrated visitor corridors or zones or nodes to increase the connectivity between existing assets and further the lures/hubs-and-spokes approach to visitation. This will improve on critical mass in particular locations of need.
- 2. Destination Development Manager (DDM) Coverage** – Stakeholders across the Commonwealth felt strongly that the DDMs across the state do an incredible job of connecting to local communities and partners. This program is highly valuable to DMOs and businesses at the local and regional levels. Today, the DDM coverage has focused mostly on regions with lesser resources but high potential. However, that has left some regions without in-area coverage or uneven coverage. There may be a need to shift or add DDM resources to cover all regions in market. Stakeholders suggested alignment of coverage with tourism regional boundaries. This would potentially require a budget increase request to fund 2-3 new positions.
- 3. VTC Tourism Regional Boundaries & Potential for New Tourism Regions** – Stakeholders appreciate the regional connection and see value in how the tourism boundaries bring people and places together. However, there could be an opportunity to better align what is considered today to be "sub regions" into standalone regions. Consider a study on regional boundaries based on partner and product alignment. Another consideration is to align the VTC tourism regions with GO Virginia regions for consistency. Hunden recommends VTC work with the localities in the existing tourism regions to study the need for adjustments to tourism regional boundaries.
- 4. Steering Committees** – This project brought stakeholders together for important discourse about the future of planning at the state and regional levels. Steering Committees were formed and met throughout this process. It is recommended that the Steering Committees be extended during implementation of the STP to meet with VTC on a regular cadence, to continue to advance the dialogue about regional needs and partnership.

BEGIN THE JOURNEY

CLICK TO TRAVEL TO REGION* 



**New Virginia Piedmont region effective January 1, 2027. Regional plan will be included in future editions of STP.*