

VIRGINIA
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Statewide Strategic
Tourism Plan

2026 – 2029



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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

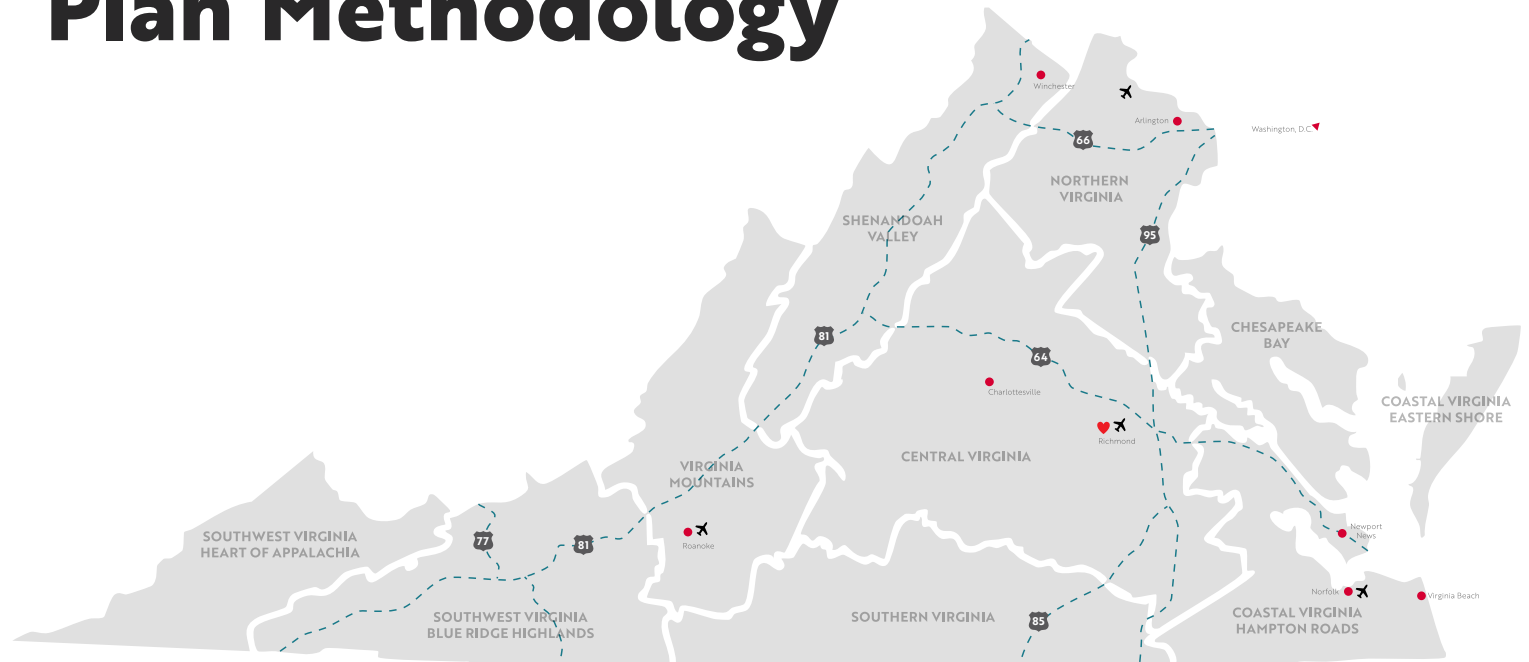
Outlines priority projects and funding opportunities, ranks initiatives with the greatest statewide and regional impact, and provides a tactical roadmap for recommendation implementation.

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.

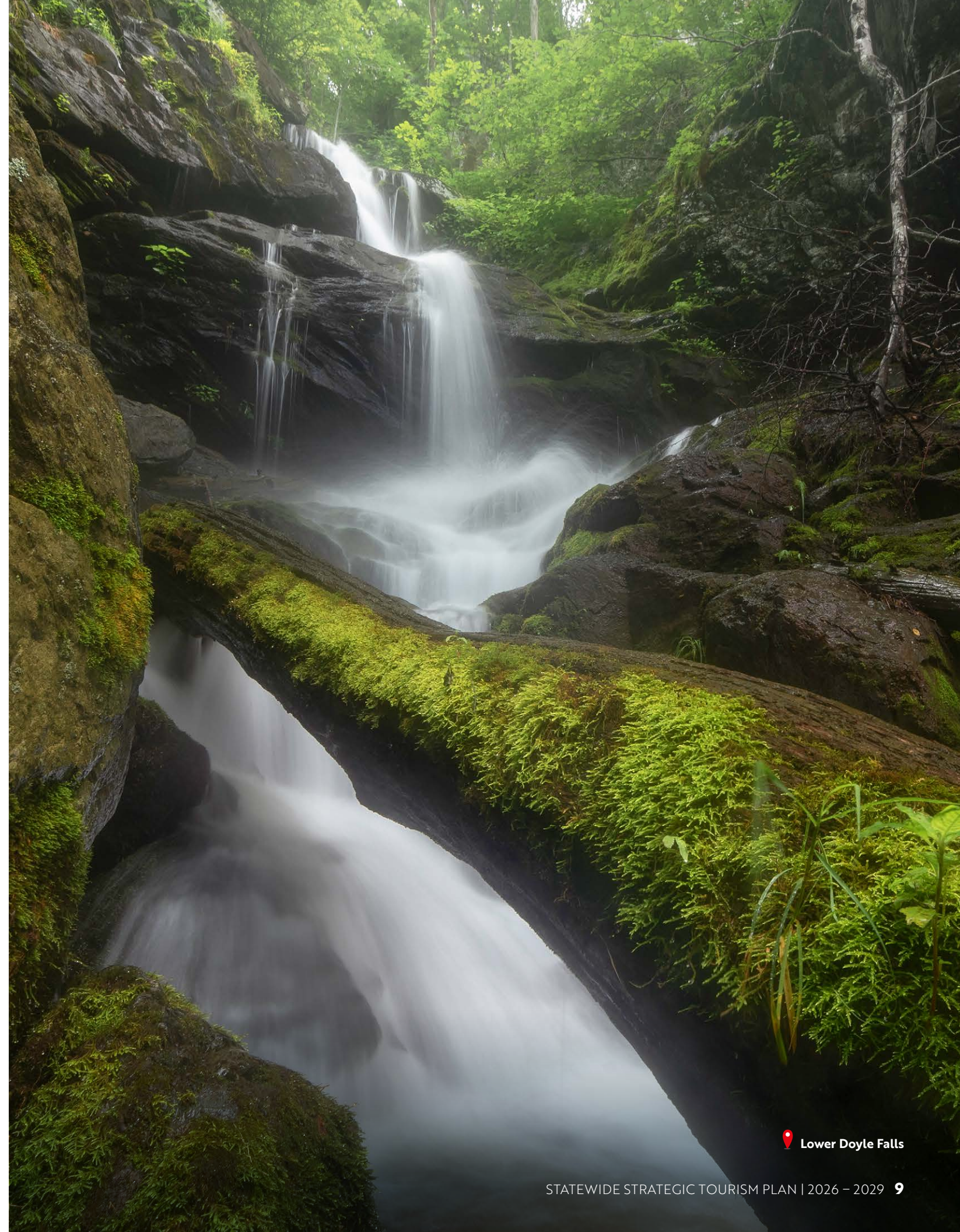
COMPONENTS OF THE STP:

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

30

Virtual Steering Committee Meetings

15

Site Visits to Regions

235

Virtual and/or In-Person Focus Group Meetings

450

POIs Visited

700

Individual Stakeholders Engaged

180

In-Person Meetings



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.

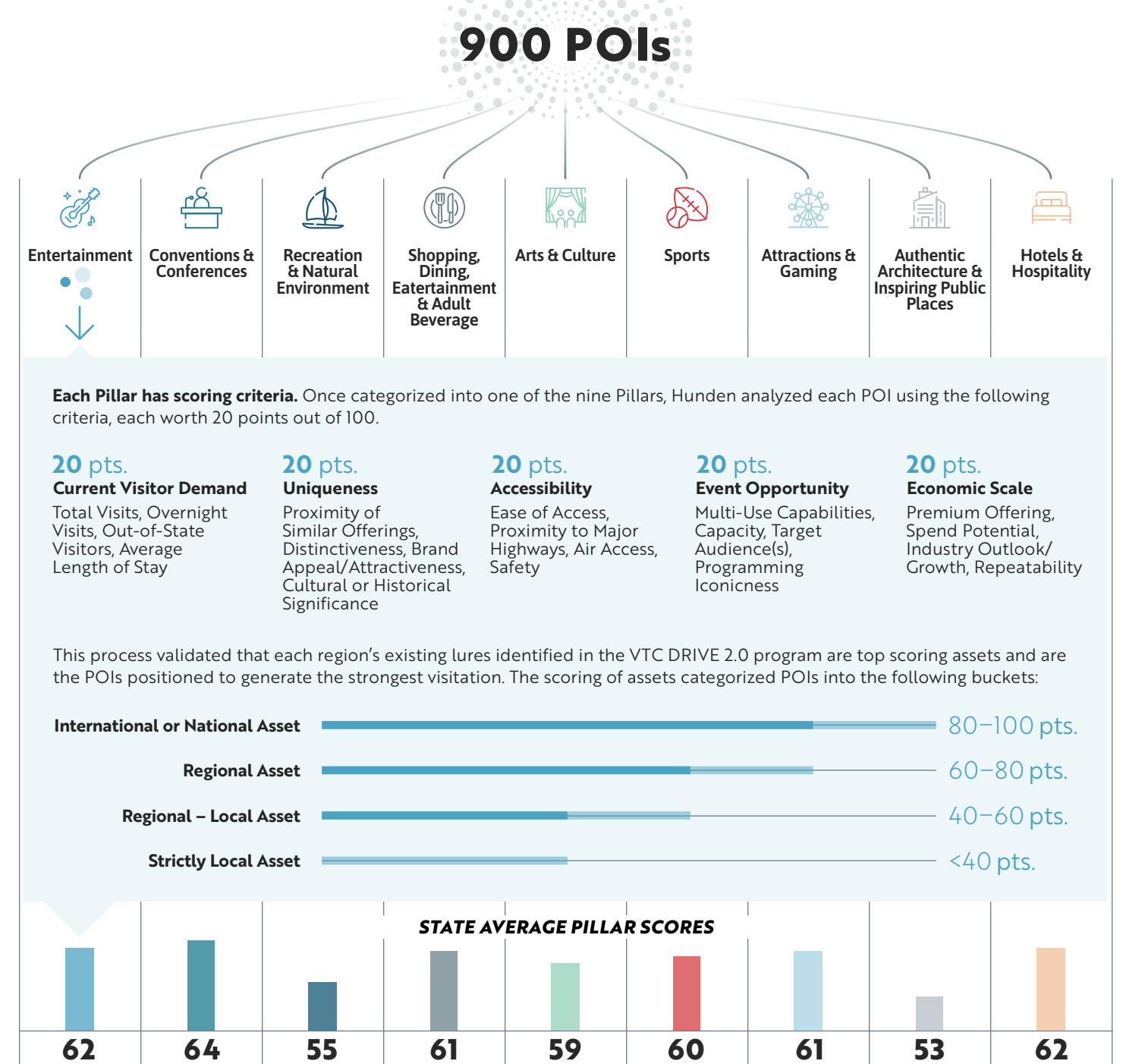
Hunden applied a proprietary scoring methodology to all POIs provided by VTC to evaluate regional asset performance and determine each region’s current positioning. POIs were then categorized into Hunden’s Pillars of Place, grouping similar asset types to ensure consistency across regions while allowing 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"> 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> 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> Aman Resorts – known for privacy, serenity, and highly personalized service in secluded, destination-driven settings. <i>Example: Amangani Jackson Hole, WY.</i> 	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.	Strong potential for boutique resort development, wellness-oriented lodging, and premium food experiences that can capture longer, higher-spend stays across Virginia.
Solo Travel	<ol style="list-style-type: none"> Intrepid Travel’s solo-only tours – purpose-built itineraries for solo travelers seeking independence with built-in community. Priceline’s “Solo Explorer” promotions – demonstrates how OTAs are actively targeting and packaging solo travel demand. Solo-focused tour operators expanding in the U.S. – signals the scale and maturity of the solo travel segment. 	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.	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.
Adventure Tourism on the Rise	<ol style="list-style-type: none"> Recreational kayaking and watersports showing strong growth, particularly in urban-adjacent areas. Moab, UT expanding outfitters offering packaged rentals and guided experiences that reduce barriers to entry. National Park Service reporting a record 331.9 million recreation visits across more than 400 sites in 2024. 	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.	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.
Authentic Local Cultural Interest	<ol style="list-style-type: none"> Airbnb integrating bookable local services and experiences alongside accommodations, enabling easier access to local guides, chefs, and makers. Lake Charles, LA culinary storytelling – using signature dishes and local food identity to connect visitors with place. People-First Tourism (Raleigh, NC) – centering resident voices, local businesses, and community benefit in tourism development. 	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.	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.

TREND	BEST PRACTICE EXAMPLE	OVERVIEW	VA IMPLICATION
"Town-Sizing" & the Value-Seeking Traveler	<ol style="list-style-type: none"> New Hope, PA & Lambertville, NJ for walkable downtowns, antiques, and riverfront settings. Ouray, CO for outdoor recreation paired with hot springs and small-town character. Bentonville, AR for world-class outdoor recreation combined with strong cultural amenities. 	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.	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.
Technology Driving Bookings	<ol style="list-style-type: none"> AI-powered trip-planning chat tools enabling conversational, personalized itinerary building. AI-integrated travel search platforms that allow travelers to plan complete trips by asking questions rather than navigating filters. Flexible payment and “Buy Now, Pay Later” options increasingly offered at checkout for travel and event bookings. 	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.	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.
Road Trips and Regional Travel Persist	<ol style="list-style-type: none"> The quintessential California road trip experience. Route 66 Centennial-themed travel experiences. The Blue Ridge Parkway, a long-established Virginia asset. 	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.	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.
Experiences Drive Destination Choice	<ol style="list-style-type: none"> Multigenerational travel destinations such as Outer Banks, NC and Hilton Head, SC. All-inclusive experiential resorts like Mohonk Mountain House, NY. Themed experience trails such as the Kentucky Bourbon Trail. 	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.	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.
Travel Planning Windows are Getting Shorter	<ol style="list-style-type: none"> Vacations by Marriott last-minute deals offering time-sensitive discounts. American Airlines featured and last-minute fare promotions targeting near-term travel decisions. Last-minute hotel booking platforms designed for same-day or next-day stays. 	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.	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.

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."

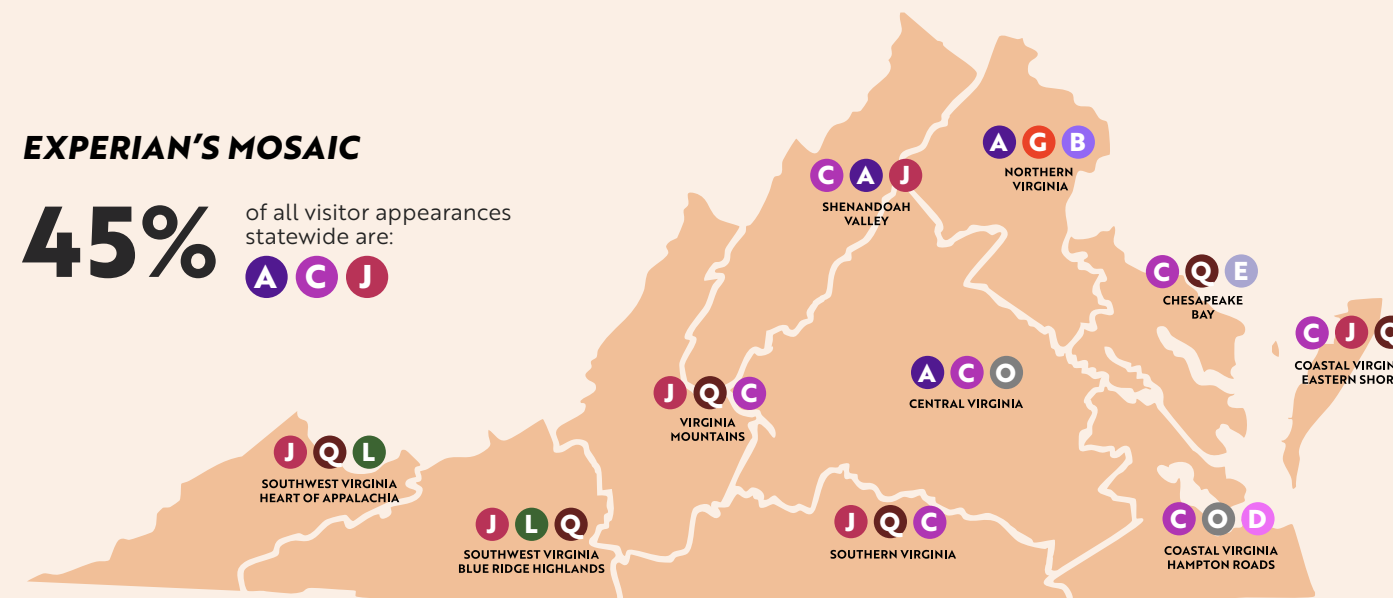
TRAVEL & ACTIVITY ENTHUSIASTS

■ 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:



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



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



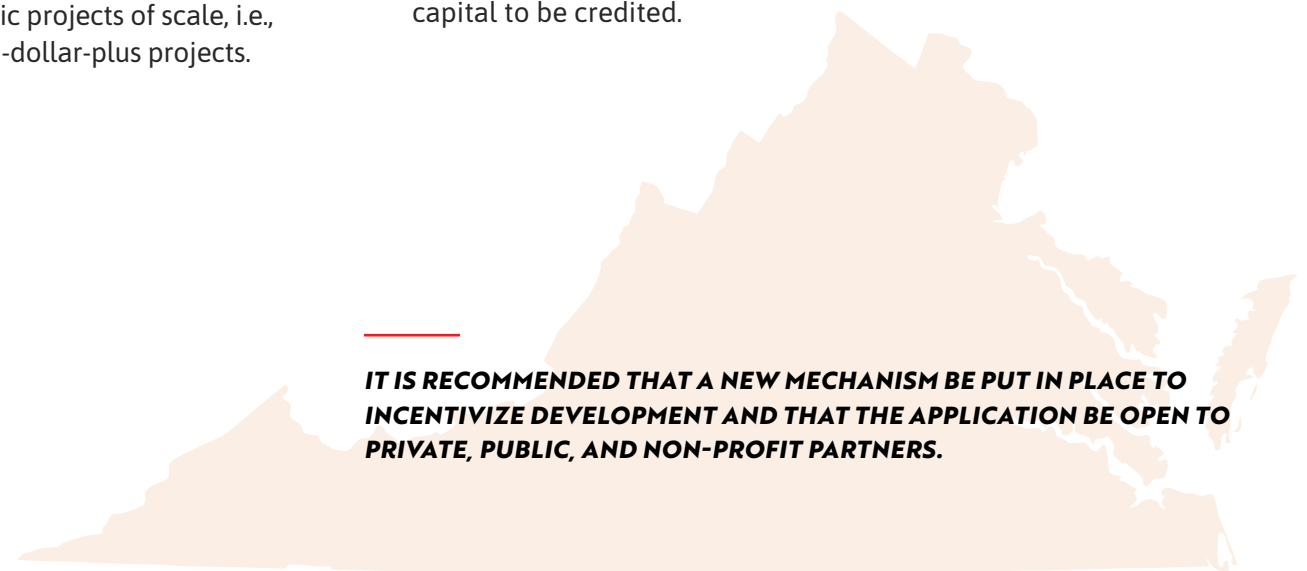
New Point Comfort Natural Area Preserve

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

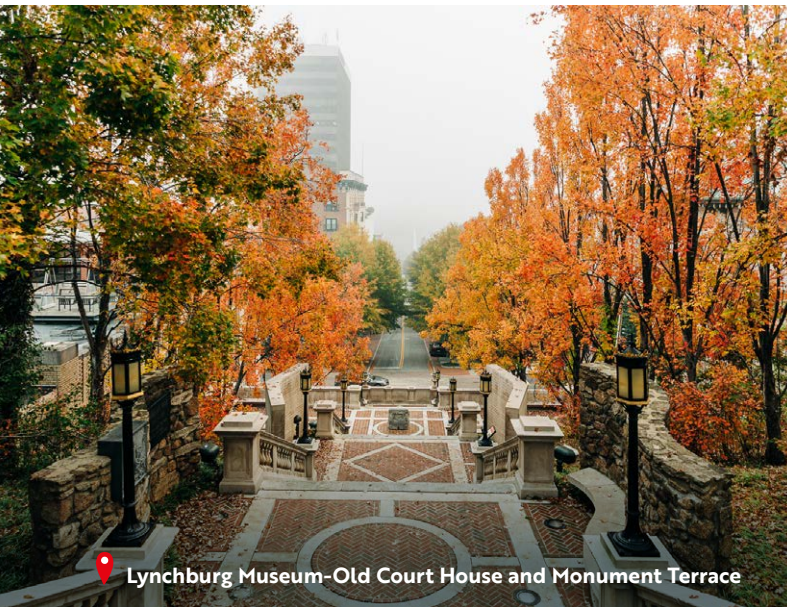
CLICK TO TRAVEL TO REGION



Central Virginia

STATE OF THE REGION

The Central Virginia Region is comprised of twenty-three (23) counties including Albemarle, Amelia, Amherst, Appomattox, Buckingham, Campbell, Chesterfield, Cumberland, Dinwiddie, Fluvanna, Goochland, Greene, Hanover, Henrico, Louisa, Madison, Nelson, Nottoway, Orange, Powhatan, Prince Edward, Prince George, Sussex, and six independent cities including Charlottesville, Colonial Heights, Hopewell, Lynchburg, Petersburg, and Richmond. Central Virginia is the state's largest geographical region anchored by dynamic hubs such as Richmond, Charlottesville, and Lynchburg, yet equally defined by its expansive rural landscapes and small-town character. Beyond its urban centers which blend historic charm with modern amenities, much of Central Virginia is characterized by quiet living, scenic countryside, and intimate communities where heritage and hospitality remain integral to daily life. The region is home to major universities, government institutions, and healthcare centers, alongside thriving financial, manufacturing, and agricultural sectors. Visitors enjoy award-winning wineries, historic presidential estates, museums, and cultural attractions. With access to the Blue Ridge Mountains, Shenandoah National Park, and the James River, Central Virginia combines rich history, natural beauty, and economic vitality.



Lynchburg Museum-Old Court House and Monument Terrace



\$6.0B	Total Direct Spending
46.95K	Total Employment
\$2.0B	Total Labor Income
\$173.0M	Total State Taxes
\$283.6M	Total Local Taxes

Based on the 2024 economic impact numbers prepared by VTC, the Central Virginia Region generated the impacts above, which allotted for nearly 18 percent of Virginia's total spending, ranking it the third highest economic impact contributing region for the state.

Visitor spending and associated economic impact from tourism continues to increase year over year for the Central Region, which indicates that the region is not only stable but expanding its tourism economy, outpacing inflation in select categories.

Based on Hunden's Pillars of Place assessment and feedback accumulated from extensive stakeholder engagement, which included regional focus groups, industry-represented steering committee, individual interviews, and a region-specific survey, a SWOT analysis was prepared for the region.

STRENGTHS

The region's strategic central location is well-served by interstate access via I-64, I-81, I-95, and U.S. Routes 360 and 460, connecting the region's more rural areas and presenting economic diversity across key sectors. Central Virginia is successfully attracting visitors with its mix of cultural, historical, and outdoor assets.

The assets among the Sports, Hotels & Hospitality, Entertainment, Attractions & Gaming, and Arts & Culture scored the strongest as a pillar across enough critical mass of points of interest (POIs) analyzed. These results are consistent with the identified core lures for the region, History and Heritage, Attractions, Lodging and Accommodations, and Food and Beverage Experiences.

Sports

Central Virginia is positioned as a rising sports hub with assets across the region that drive overnight stays and increased economic impact with large-scale events that attract teams and groups on a national level. Nationally recognized facilities in the region include the River City Sportsplex and Henrico Sports & Events Center. Sports has been highlighted as one of the core product priorities for the region and serves as a major growth sector.

Entertainment

Although Central Virginia features a modest inventory of standalone entertainment venues, existing assets demonstrate strong visitor demand and deliver high-quality experiences. Entertainment in the region naturally complements and blends with its arts and culture, and dining scenes, creating immersive experiences that serve as an anchor for visitation.

Hotels & Hospitality

Central Virginia's hospitality sector is anchored by landmark hotels such as The Jefferson Hotel and Keswick Hall, which offer nationally recognized lodging experiences that elevate the region's profile. These iconic accommodations, combined with a diverse mix of boutique hotels, historic inns, resorts, and chain properties, ensure a strong balance between tourism generators and tourism accommodators. The breadth of hospitality offerings allows Central Virginia to serve both leisure travelers seeking authentic stays and business visitors attending conventions or meetings.

Attractions & Gaming

Central Virginia's attraction assets serve as powerful draws for both residents and visitors, to offer a diverse range of experiences that enhances the region's tourism appeal. The region's attractions range from family-friendly destinations such as Kings Dominion and Lewis Ginter Botanical Garden to outdoor recreation such as Liberty Mountain Snowflex Centre and Wintergreen Resort. These assets provide year-round opportunities for leisure and exploration. The introduction of gaming facilities has further diversified the entertainment landscape, with Petersburg home to the Live! Casino & Hotel Virginia, set to open in 2027 and the temporary casino opened in January 2026. These assets strengthen Central Virginia's position as a dynamic and multifaceted destination.

Arts & Culture

Central Virginia's arts and culture assets form one of the region's greatest strengths, reflected in the high volume of identified POIs compared to other regions across the Commonwealth. This concentration underscores both the depth and diversity of cultural offerings found throughout the entire region with a blend of history and contemporary experiences. Anchored by major universities such as the University of Virginia, Virginia State University, Longwood University, Liberty University, and Virginia Commonwealth University (VCU), among others, the region benefits from steady demand drivers of performances, major events, and academic programming that enrich the cultural landscape and attract visitors year-round.

WEAKNESSES

Despite its strong asset base, Central Virginia faces notable challenges to its tourism potential. Lodging supply remains a persistent gap, particularly in rural areas and near sports venues and outdoor recreation assets, constraining multi-day visitation. Infrastructure and accessibility issues — including gaps in air access, public transit, and trail networks — further hinder visitor mobility. Central Virginia's natural assets are unmatched but infrastructure improvements could leverage visitor experiences. Overreliance on traditional history and heritage tourism risks narrowing appeal, particularly among younger and more diverse audiences who seek interactive and contemporary experiences.

The region also faces the perception of misalignment with rural and underrepresented assets overshadowed by larger, urban centers like Richmond and Charlottesville, which tests the ability to offer a cohesive regional experience.

Central Virginia

OPPORTUNITIES

Centrality can be further leveraged to position the region as a convenient hub for tourism, business, and events. The region currently offers rich cultural and historic identity with prominent assets that can be a key differentiator with tactful coordination and modern cultural programming. Based on strengths and current gaps in the market, opportunities in multiple Pillars of Place asset categories were identified.

Recreation & Natural Environment

One of Central Virginia's greatest assets is the natural environment and outdoor recreation, which remains a top priority with potential to enhance riverfront access, improve existing facilities, expand and connect trail networks, and introduce authentic lodging options such as cabins and glamping. The region's growing agritourism sector presents an opportunity to deepen visitor engagement with the landscape while supporting local producers. Collectively, these initiatives could create authentic and intentional experiences with development along riverfronts and trails that would present new experiences for visitors.

Shopping, Dining, Eatertainment & Adult Beverage

Central Virginia can further establish itself as a premier culinary and beverage destination by strengthening trails, partnerships, and regional branding across wineries, breweries, and farm-to-table dining. With stronger cross-market trails and regional campaigns, bundling culinary and beverage experiences with attractions could encourage longer stays and higher visitor spending.

Sports

The region attracts national tournaments and produces a high volume of sports tourism with its current supply. Its competitive advantage is diminished by infrastructure challenges such as lodging surrounding these venues. There is an opportunity to enhance facilities and accommodations to support larger tournaments and events, further positioning the region as a sports hub for youth, collegiate, and amateur tournament hosting.

Hotels & Hospitality

Due to the region's geographic diversity, needs in hotel and hospitality vary by city and county. The region's rural counties lack unique and compelling lodging options to convert visitors to recreation areas to overnight stays, while the more urban areas – particularly Richmond – face a shortage of quality, full-service hotels with sufficient room blocks, meeting space, and onsite amenities to accommodate conventions and larger group business in addition to corporate and leisure travel. While Richmond has an existing base of full-service hotels, the absence of a convention-scale property limits its ability to attract and host larger meetings and events, resulting in unaccommodated or lost group demand. There is a healthy supply of new hotels in the pipeline in booming areas such as Henrico County and Chesterfield County that will fill a gap in the market and support sports tourism anchors; however, other areas across the region continue to recognize the need for additional and more appropriately scaled hotel supply to fully capture group, convention, and overnight visitation opportunities.

THREATS

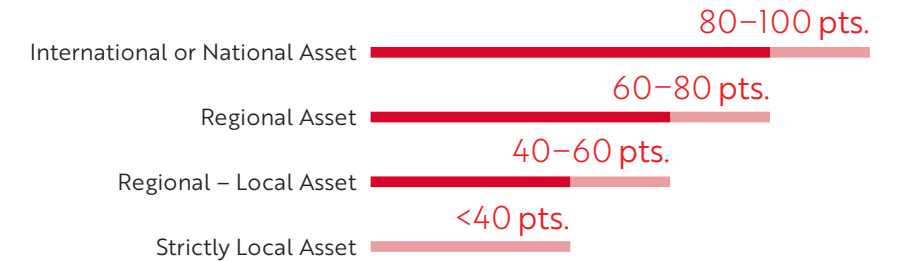
Central Virginia's growth potential is tempered by several external risks. Competing markets such as Charleston, Asheville, and Knoxville may capture market share through stronger branding, infrastructure, and visibility. Without continued investment in transportation, lodging, and recreation access, Central Virginia risks being outpaced by these peers. Stronger cohesion and storytelling would benefit Central Virginia as to not be perceived as a "middle region" rather than a premier destination, limiting its ability to differentiate itself in a highly competitive tourism landscape.



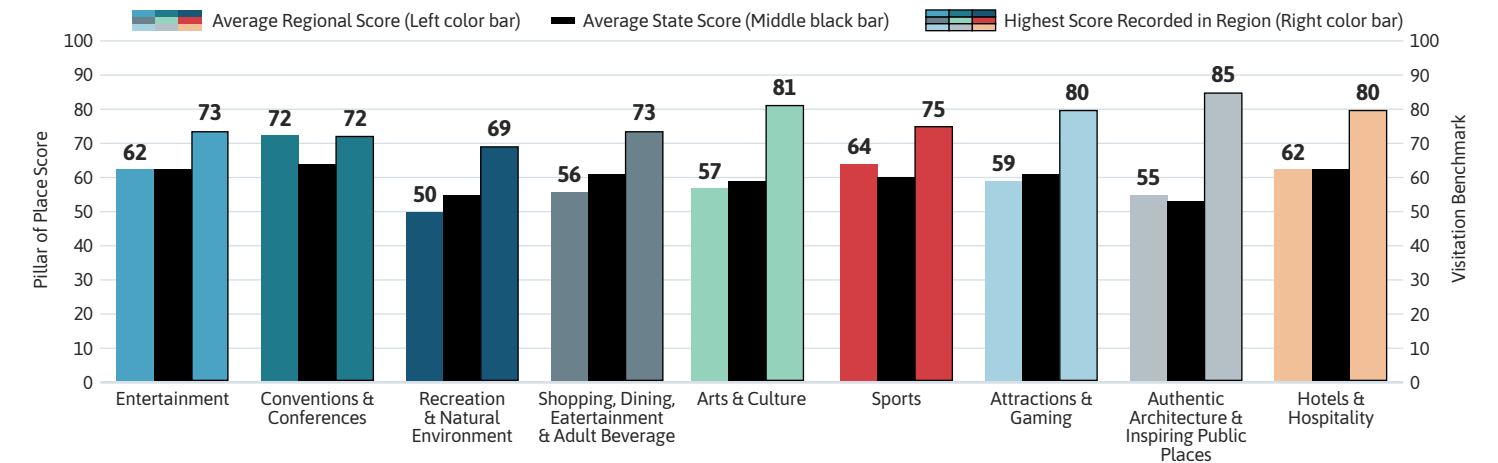
PILLARS OF PLACE – REGIONAL ASSET PERFORMANCE

VTC worked with stakeholders across the state in each region to identify relevant POIs for the tourism experience. Hunden scored and ranked the regional POIs as provided by VTC to analyze the regional performance of assets versus the average performance of assets across the state.

Assets were scored on a scale between 0 and 100 by a total of 20 different metrics. The scoring of assets was categorized in the following tiers shown on the right, while the regional pillar scores are shown in the table below:

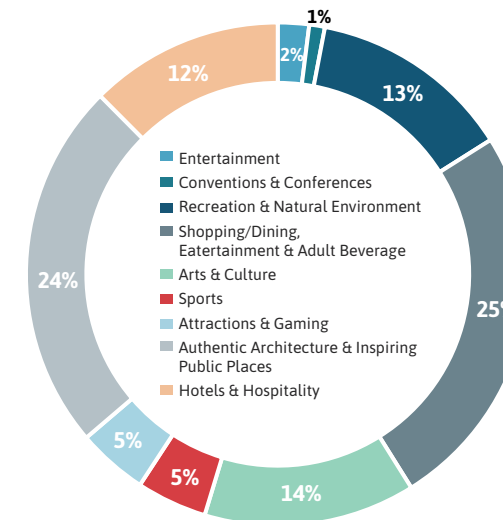


Pillars of Place Assessment | Central Virginia



The following graphic details the number of POIs within each Pillar of Place within the region.

Pillars of Place Assessment | Total POIs by Pillar



The Pillars of Place analysis, the volume of POIs within each Pillar, stakeholder feedback, and the region's current and future target audience were considered when identifying tactical recommendations for each region. Assets were individually assessed based on offerings and current effectiveness in attracting national and regional visitation to identify gaps within each Pillar.

Within Central Virginia, this analysis highlighted the lack of total assets and current scoring in the Convention and Conferences, Attractions and Gaming, Hotels and Hospitality, and Entertainment Pillars. Hunden identified tactical recommendations for specific Pillars to raise the regional Pillar score with assets capable of attracting national and regional visitation.

Central Virginia shows strong regional draw across all the Pillars, with a high volume of assets. Although some Pillar categories score lower than the state average overall, the maximum score reflects the strength of high-quality assets and the scoring in national and regional levels. This showcases the opportunity to continue to promote existing product as a vital contributor to the tourism economy.

Central Virginia

TARGET AUDIENCE PROFILES

The target audience analysis for Central Virginia was conducted on a sample of the top assets across the pillars in the region to provide insight into the current visitor types, as well as those most aligned with the region's offerings to leverage for future growth. The audience profiles were analyzed through Placer.ai access to Experian customer data based on current visitation.

The three dominant segments — Power Elite, Booming with Confidence, and Singles and Starters — account for the majority of visitation across premier destinations. These three segments account for the highest percentage of visitation to the top POIs aligned with the regional lures. The distribution represents Central Virginia's appeal to affluent, experience-driven travelers as well as younger, socially active audiences seeking authentic experiences shaped by the region's culture, history, and sense of place.

A

Power Elite

The Power Elite group represents the most affluent households with average incomes exceeding \$250,000 and defined by influence, education, and refined living. These accomplished professionals are visitors who value refined yet authentic experiences, suggesting opportunities to expand premium offerings, such as curated culinary events, private heritage tours, and elevated lodging and wellness experiences.

C

Booming with Confidence

The Booming with Confidence audience consists of prosperous, established couples and families that value comfort, quality, and shared experiences. Their stability and affluence make them strong consumers or an ideal target for family-friendly lodging, agritourism, and outdoor recreation that blends relaxation with culture and nature.

O

Singles and Starters

Younger Singles and Starters are most common at urban and university-linked attractions like Downtown Richmond, the Downtown Mall in Charlottesville, and the University of Virginia. They are social, digital, and trend-driven with spending reflecting emerging independence. This group seeks authentic and vibrant settings with entertainment, dining, and nightlife options. Appealing to this audience through creative marketing, modernized options, and walkable, mixed-use environments can boost engagement and repeat visitation.

Source: Placer.ai Experian Mosaic Segments

Primary in-state feeder markets include Northern Virginia and Hampton Roads, which generate strong demand from affluent professionals, active empty nesters, and younger adults seeking easy, drivable cultural getaways. High-potential nearby out-of-state markets include the Washington, D.C., metropolitan area, suburban Maryland, and the Raleigh-Durham Research Triangle, where concentrations of Power Elite, Booming with Confidence, and Singles and Starters travelers are drawn to Central Virginia's blend of history, culinary experiences, arts, and vibrant urban energy. Secondary feeder markets such as Baltimore and the North Carolina Piedmont area (Greensboro-Winston-Salem) fall within a comfortable drive range and include educated, experience-driven households and social travelers seeking short stays centered on culture, events, and authentic local experiences. Collectively, these markets align strongly with Central Virginia's dominant audience segments and represent the region's greatest opportunity for incremental visitation growth.

The following regional priorities highlight the opportunities to enhance offerings catered toward the current regional target audience and to attract new target audience groups. Product recommendations were outlined to better position Central Virginia against its regional competitors within Virginia's top competitive statewide markets.



REGIONAL PRIORITIES

Regional priorities for product development and Pillar of Place enhancement were formulated based on regional scoring metrics and stakeholder feedback from in-person workshops, Steering Committee meetings, and virtual Focus Group workshops.

Entertainment

While there are only a handful of facilities, the region compares favorably to others, with venues such as the recently opened Allianz Amphitheater at Riverfront, the Paramount Theater, Virginia Credit Union LIVE! and The Meadow Event Park experiencing strong demand. Expand midsized and multipurpose venues in secondary markets like Charlottesville to complement landmark facilities. An effective programming strategy will be essential for planned venues such as the Riverfront Park Amphitheater, which is expected to open in Lynchburg in 2026 at the time of this report. Focus on building entertainment experiences that cross-blend with arts, food, and cultural districts to enhance year-round visitation.

Conventions & Conferences

Anchored by the Greater Richmond Convention Center, the current supply of event venues is supported by university venues and a select number of hotels with function space that need regional connectivity. Charlottesville and Lynchburg are examples of destinations that could serve as secondary convention spokes targeting midsized meetings, paired with hospitality and entertainment amenities. Rural destinations such as Farmville, Ashland, and Scottsville can function as spokes in the regional meeting ecosystem. Leveraging existing product in more rural areas of the region, such as Blackstone's recently renovated event venue The Armory, as well as prioritizing new product development in rural areas can target breakout retreats, workshops, or rotating niche associations to grow overnight visitation.

Recreation & Natural Environment

The region consists of the richest supply in the state (21 rivers, 47 lakes, 8 state parks, James River whitewater). However, the region scores lower than state average due to underdeveloped access points and trail connectivity. There has been investment in enhancing trails; for example, Appomattox River Trail development, the Fall Line Trail under development, and the Virginia Capital Trail and extensions coming to this asset soon. Continued investment in access to riverfront development, trail networks (bike/water), outdoor outfitters, and authentic outdoor lodging can create multi-day itineraries and drive visitation to more rural areas of the region.

Shopping, Dining, Entertainment & Adult Beverage

Strong offerings in Central Virginia with dozens of wineries and breweries, respectively, and nationally recognized dining in Richmond and Charlottesville. A regional culinary and beverage brand or certification that unifies trails under a single identity could enhance marketing efforts and awareness around these assets to elevate the region as Virginia's premier destination.

Arts & Culture

Central Virginia is home to renowned higher education institutions and historic heritage sites for visitors to explore. Growing cultural tourism through large-scale festivals and regional packaging presents an opportunity to position the arts as a connector to entertainment, food, and historic storytelling. The region already offers a rich mix of products within this pillar, rooted in its strong historical and cultural foundations, and target audience profiles consistently show a high level of interest in history, heritage, and culture. Partners should continue to work on contemporary experiences and modernize storytelling for existing product promotion.

Sports

The region attracts national tournaments and produces a high volume of sports tourism, but the infrastructure surrounding these venues reduces the region's competitive advantage. The demand for the investment in youth and collegiate tournament infrastructure and improved lodging near sports complexes ranked as one of the highest priorities among stakeholders to enhance Central Virginia's identity as a competitive sports destination.

Attractions & Gaming

Major existing anchors include Kings Dominion, Lewis Ginter Botanical Garden, and Wintergreen Resort raise the overall score of the current supply. There is a need to continue developing family-friendly attractions and integrate them into multi-day itineraries with food, beverage, and outdoor recreation. The development of the Live! Casino & Hotel in Petersburg, which is set to open in 2027 and the temporary casino opened in January 2026, will be a pivotal project for the area and create a prime attraction.

Authentic Architecture & Inspiring Public Places

Central Virginia contains a dynamic mix of unique and vibrant downtowns that provide visitors a range of experiences in Downtown Richmond, Charlottesville's Downtown Mall, and Lynchburg's riverfront as standout examples. The region should continue to revitalize historic downtowns and riverfronts, ensuring walkability, mixed-use development, and event activation in authentic areas such as Ashland, Farmville, Blackstone, and Lynchburg.

Hotels & Hospitality

The region currently has strong high-end assets (The Jefferson, Keswick Hall, Boar's Head Resort), complemented by boutique and chain hotels. However, gaps persist in rural areas, near sports venues and demand drivers such as Petersburg's new casino, and in proximity to outdoor attractions. Continue to encourage development of authentic lodging options in underserved areas.



Central Virginia

COMPETITORS

Of the statewide competitors identified for Virginia (Kentucky, Pennsylvania, North Carolina, Tennessee, and West Virginia) the following states and regions are most relevant to Central Virginia:

Pennsylvania: Lancaster and Chester and Bucks Counties

Pennsylvania’s Lancaster and Amish Country region is a strong comparable market for Central Virginia as both destinations attract visitors seeking authentic, heritage-driven, and agritourism experiences. Lancaster draws travelers with its pastoral landscapes, farm-to-table traditions, historic sites, and cultural immersion into Amish life. These experiences resonate with families, heritage travelers, and those looking for slower-paced, meaningful getaways. Both regions serve as drive-market destinations for nearby metro populations (Philadelphia for Lancaster, Washington, D.C., and Richmond for Central Virginia), drawing couples, multigenerational families, and experiential travelers who value a blend of history, foodways, and rural charm.

Central Virginia is unique where it also directly competes with Philadelphia’s Countryside region, anchored by Chester and Bucks counties. Both areas blend heritage, agritourism, wineries, and upscale leisure experiences. Chester and Bucks attract visitors with their historic estates, Revolutionary War landmarks, and well-established wine trails, paired with proximity to Philadelphia’s urban amenities. This creates a profile that resonates strongly with heritage travelers, affluent couples, and food-and-wine enthusiasts. Central Virginia competes effectively in this space by offering a broader and more nationally recognized set of historic assets from Monticello and Appomattox to Civil War and Civil Rights landmarks, which carry deeper resonance in American history.

North Carolina: Piedmont/Research Triangle Region

Raleigh, Durham, Chapel Hill, and Charlotte corridor

Central Virginia competes strongly with North Carolina’s Piedmont/Research Triangle region (Raleigh, Durham, Chapel Hill, and Charlotte corridor), where major universities, innovation hubs, and growing culinary and beverage scenes define the visitor experience. Much like Central Virginia’s anchors of the University of Virginia, VCU, and Liberty University, the Piedmont draws visitors for academics, sports, and business travel, which often extend into leisure. Both regions appeal to affluent, experience-driven travelers through acclaimed food scenes, vibrant cultural programming, and expanding beverage trails. While the Piedmont benefits from the scale of metro populations and corporate investment, Central Virginia differentiates itself with nationally iconic historic landmarks, presidential estates, and a stronger wine identity in the Monticello American Viticultural Area (AVA).

Tennessee: East Tennessee

Knoxville, Smoky Mountains, Gatlinburg/Sevierville

The East Tennessee/Smoky Mountains region serves as a natural point of comparison for Central Virginia, with both destinations drawing visitors through their scenic landscapes and recreation-based tourism. While East Tennessee leverages the Smoky Mountains, Gatlinburg, and Pigeon Forge to attract families and outdoor adventurers, Central Virginia offers a parallel mix of mountain foothills, rivers, and family attractions such as Kings Dominion and Wintergreen Resort. What sets Central Virginia apart is its ability to layer outdoor adventure with nationally significant history, Civil Rights landmarks, and a celebrated food and beverage scene, creating a more diverse experience that resonates not only with families and adventure seekers but also with heritage tourists and culinary travelers.

Kentucky: Lexington & Bluegrass Region

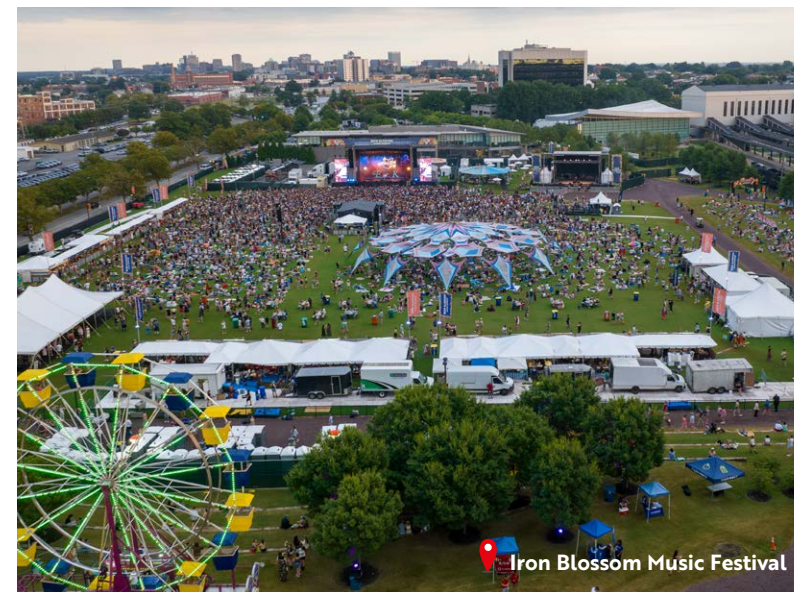
Central Virginia competes with Kentucky’s Lexington & Bluegrass Region, where equestrian culture, bourbon distilleries, and pastoral landscapes define the visitor experience. Much like Kentucky’s horse farms and bourbon trail, Central Virginia offers vineyards, equestrian heritage, and craft beverage trails, appealing to affluent leisure travelers and heritage enthusiasts. While Lexington leans heavily on its global identity as the “Horse Capital of the World,” Central Virginia broadens its appeal by pairing agritourism and equestrian roots with presidential history, cultural attractions, and nationally acclaimed dining, capturing both traditional and experience-seeking visitors.



Petersburg National Battlefield



Liberty Mills Farm



Iron Blossom Music Festival



Fort Germanna Visitor Center

Central Virginia

TACTICAL RECOMMENDATIONS

Based on the Pillars of Place analysis and stakeholder feedback, Hunden recommends an emphasis on the following Pillars of Place for the enhancement of tourism in Central Virginia. Additionally, regional coordination could be improved, with stakeholders citing the need for stronger cross-locality collaboration and closer alignment with VTC.

Recreation & Natural Environment

- **Riverfront Development & Access:** Expand public access along the James and Appomattox Rivers through new launch points, docks, and activity hubs developed in partnership with local governments, landowners, land trusts, and outfitters. Activate riverfront areas using concession-based models that support rentals, guided experiences, food and beverage, and seasonal programming.
- **Regional Trails & Connectivity:** Complete and connect regional trail systems by aligning jurisdictions on phased development plans and co-branding them under a unified Central Virginia outdoor identity, supported by state and federal recreation grants. Enhance visitor navigation through coordinated wayfinding signage, kiosks, and mobile tools that connect trails and rivers with nearby dining and lodging.
- **Outdoor Lodging & Overnight Conversion:** Encourage development of authentic outdoor lodging such as cabins, eco-lodges, and glamping accommodations near natural assets. Utilize eligible tax credits, incentives, and public-private partnerships to attract developers and landowners.
- **Agritourism & Signature Outdoor Assets:** Expand agritourism offerings, celebrating the region's farming heritage through farm stays, vineyard tours, and hands-on agricultural experiences that blend recreation with heritage tourism. Explore the feasibility of signature outdoor adventure assets, such as a branded riverwalk or adventure park, to differentiate Central Virginia from the regional marketplace.

Development within Recreation & Natural Environment strengthens Central Virginia's overall tourism foundation by enhancing access to natural assets, improving connectivity, and expanding experiential offerings that support longer stays, increased visitor spending, and repeat visitation across a broad range of traveler types.

Attractions & Gaming

Central Virginia has an opportunity to strengthen its tourism profile by broadening the range of attractions available to visitors and creating experiences that complement, rather than replicate, its historic and natural assets.

- Development of interactive, family-friendly, and experiential attractions that encourage longer stays and repeat visitation, including indoor/outdoor experiences, immersive exhibits, and hands-on entertainment concepts.
- Attractions should be designed to operate year-round and support a range of group sizes, including families, couples, and social travelers.
- Evaluation of larger-scale signature attractions, such as themed resorts or signature entertainment complexes, that elevate Central Virginia's visibility and differentiate the region within the competitive landscape.
- New assets should complement, not replicate, existing anchors such as Kings Dominion, and should integrate seamlessly with the region's outdoor, culinary, and hospitality offerings.
- Exploration of small- to mid-scale destination entertainment districts that integrate attractions with food, beverage, retail, and public gathering spaces. These districts should be walkable, flexible, and capable of hosting seasonal programming and events.
- A feasibility study should be conducted to determine the optimal scale, location, and mix of attraction and entertainment assets that would generate the greatest impact on overnight visitation and year-round demand.

Central Virginia currently lacks a concentration of modern, experiential attractions that can consistently drive multi-day itineraries beyond its historic and natural offerings, particularly when compared to regions such as Pennsylvania's Chester and Bucks Counties, with their established wine trails and immersive heritage estates, and North Carolina's Piedmont/Research Triangle, where vibrant cultural programming, culinary scenes, and university-driven experiences support extended visitation. While existing assets perform well independently, the absence of clustered, destination-oriented entertainment affects the region's ability to extend stays and compete with peer regions offering more comprehensive visitor experiences.

Hotels & Hospitality

- Closing lodging gaps is critical to Central Virginia's ability to convert visitors into overnight guests. The ability to grow as a tourism destination depends on developing a more diverse and strategically located lodging portfolio that reflects both the character of the region and the needs of today's travelers.
- There is an opportunity for a full-service hotel with at least 300 rooms, accompanied by an additional 20,000 – 30,000 square feet of ballroom and meeting space, located in more urban or high-demand areas to capture group, corporate, and event-driven business.
- Encourage boutique hotels in historic downtowns to complement the region's cultural and culinary assets.
- Expand authentic lodging options such as cabins, inns, and glamping near outdoor recreation areas and agritourism hubs.
- Support development of destination resorts that integrate wellness, culinary, and cultural experiences.
- While iconic properties such as The Jefferson and Keswick Hall set a high standard, gaps remain in mid-scale, resort-style, and experience-driven accommodations. Expanding lodging variety is critical to converting day visitors into overnight guests and enabling visitors to pair the region's wineries, historic sites, outdoor adventures, and cultural attractions with accommodations that feel rooted in Central Virginia's unique identity.

CONCLUSION

Central Virginia occupies a unique position within the Commonwealth, offering a compelling blend of historic depth, vibrant urban culture, agricultural heritage, and accessible outdoor recreation. While these assets already draw consistent visitation, the region's long-term growth potential depends on better connecting experiences, expanding visitor-ready infrastructure, and converting strong day-trip demand into longer higher-value stays.

Addressing gaps in recreation access, attractions and entertainment, and lodging diversity will allow the region to function more cohesively as a multi-day destination rather than a collection of individual sites.

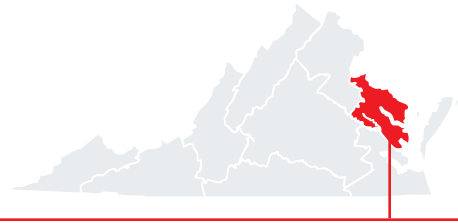


Chesapeake Bay

STATE OF THE REGION

The Chesapeake Bay Region is comprised of eleven (11) counties: King George, Lancaster, Richmond County, Northumberland, and Westmoreland, in the Northern Neck; and Essex, Gloucester, King & Queen, King William, Middlesex, and Mathews, on the Middle Peninsula. Virginia's Chesapeake Bay region is defined by its waterfront heritage, scenic shorelines, and historic small towns. Comprised of the Northern Neck and Middle Peninsula, the region blends coastal charm with economic activity in tourism, aquaculture, and marine trades. Visitors are drawn to its calm beaches, Civil War and Revolutionary War history, festivals, and boating culture, while communities continue to preserve centuries-old traditions. With its strategic location, natural beauty, and relaxed pace, the Chesapeake Bay region offers a distinctive balance of heritage, hospitality, and coastal vitality.

The Northern Neck part of the region was also recently designated a National Heritage Area, a milestone achieved after two decades of effort. This designation elevates the Chesapeake Bay's national profile and positions the region to leverage new funding, preservation initiatives, and heritage tourism opportunities.



\$366M Total Direct Spending
2.56K Total Employment
\$78.3M Total Labor Income
\$7.7M Total State Taxes
\$15.4M Total Local Taxes

Based on the 2024 economic impact numbers prepared by VTC, the Chesapeake Bay Region generated the impacts above, which allotted for one percent of Virginia's total spending.

Based on Hunden's Pillars of Place assessment and feedback accumulated from extensive stakeholder engagement, which included regional focus groups, industry-represented steering committee, individual interviews, and a region-specific survey, a SWOT analysis was prepared for the region.

STRENGTHS

The Chesapeake Bay region offers a diverse mix of tourism experiences, with its strongest assets concentrated in the Authentic Architecture & Inspiring Public Places, Recreation & Natural Environment, and Events & Festivals Pillars. Points of Interest (POIs) within these categories emerged as the highest-performing attractions across the region and align closely with several of VTC's key lures for the area, which include maritime heritage, small-town charm, outdoor recreation, and coastal culinary experiences.

Authentic Architecture & Inspiring Public Places

Historic waterfront towns such as Urbanna, Irvington, and Colonial Beach offer authentic charm through preserved main streets, working harbors, and small-scale gathering places. These settings strongly appeal to travelers seeking a slower-paced, community-centered experience and provide a backdrop for seasonal festivals and local events.

Recreation & Natural Environment

The region is surrounded by more than 200 miles of coastal shoreline and extensive waterways that support kayaking, boating, fishing, and oyster harvesting. The presence of state parks and abundant camping options throughout Middlesex County such as Bethpage Camp-Resort, provide foundational natural assets. Although much of the waterfront is privately owned, existing assets such as numerous marinas, public landings, and parts of the Virginia Water Trails form a foundation for water-based tourism. Collaborative initiatives such as Virginia's River Realm, a partnership between Middlesex, Lancaster counties, and the Town of Tappahannock, further demonstrate the potential of unified destination branding, marketing, and programming to elevate the region's outdoor recreation profile. Emerging projects like the TriWay Trail and waterfront improvements in Lancaster County further demonstrate the region's momentum in enhancing access and outdoor recreation infrastructure. The natural environment remains a primary draw for both in-state and regional visitors.

Events & Annual Festivals

Seasonal programming, including signature events like the Urbanna Oyster Festival and the Gloucester Daffodil Festival, along with cycling events like the Tour de Chesapeake, and local market days and farmers markets, serve as a core visitor attraction and a key demand driver. These events encourage repeat visitation and showcase the region's cultural identity and community spirit.

WEAKNESSES

Despite its rich natural environment and historical character, the Chesapeake Bay region faces several challenges that limit its ability to fully capitalize on tourism. The region's hotel supply, particularly family friendly and midscale accommodations, reduces its ability to convert day-trippers into overnight visitors. Improving the number and type of lodging options fosters extended stays and group events.

Public waterfront access is a major constraint. While the region is geographically defined by its shoreline, more than 90 percent of waterfront property is privately owned, which lessens physical access to one of the area's defining assets.

Transportation access is also a key barrier. Without direct interstate connections and fixed-route public transit, travel between destinations in the region often requires long, rural drives. Wayfinding, signage, and parking are inconsistent, particularly at recreational sites.

While the Northern Neck is supported by a unified regional destination marketing organization (DMO), the Middle Peninsula lacks a comparable structure. As a result, cross-regional marketing and promotion remain fragmented, limiting the ability to deliver a cohesive visitor journey across the broader Chesapeake Bay region. Strengthening collaboration between the Northern Neck and Middle Peninsula presents a key opportunity to unify messaging and enhance the overall visitor experience. Additionally, some communities remain resistant to tourism growth, citing concerns about preserving rural character and an absence of consensus on how and where to accommodate increased visitation. These challenges are compounded by the outmigration of young adults and working-age residents, which diminishes the labor force needed to support tourism infrastructure.



Town of Irvington



Gloucester Daffodil Festival

Chesapeake Bay

OPPORTUNITIES

The Chesapeake Bay Region has several clear opportunities to expand and enhance its tourism product by leveraging existing strengths and addressing identified gaps:

Recreation & Natural Environment

With its expansive shoreline and waterways, the region is well positioned to emerge as a leader in outdoor recreation. Investments in water access points, wayfinding, and equipment rentals, combined with the development of blueway and greenway trail networks, could significantly enhance the visitor experience. Integrating these improvements with existing marinas, campgrounds, and outfitters would create impactful, low-cost enhancements of the regional offering.

Hotels & Hospitality

Targeted investments in boutique inns, midscale hotels, and family-friendly accommodations, especially in areas such as Kilmarnock, Gloucester, and Colonial Beach, could generate new overnight demand. At the same time, several parts of the region have no hotel accommodations, including West Point/King William, Warsaw/Richmond County, King & Queen County, and Middlesex County, creating clear gaps in lodging coverage and hindering tourism growth potential. Existing underutilized hotel properties may benefit from stronger marketing, group bookings aligned with festivals or sporting events, and partnerships with outdoor recreation operators.

Agritourism & Culinary Experiences

Emerging lavender farms, farm-to-table offerings, seafood traditions, and wine trails provide a foundation for distinctive culinary and agritourism branding. With improved coordination, packaging, and itinerary development, these experiences could attract regional visitors beyond peak event seasons.

Sports

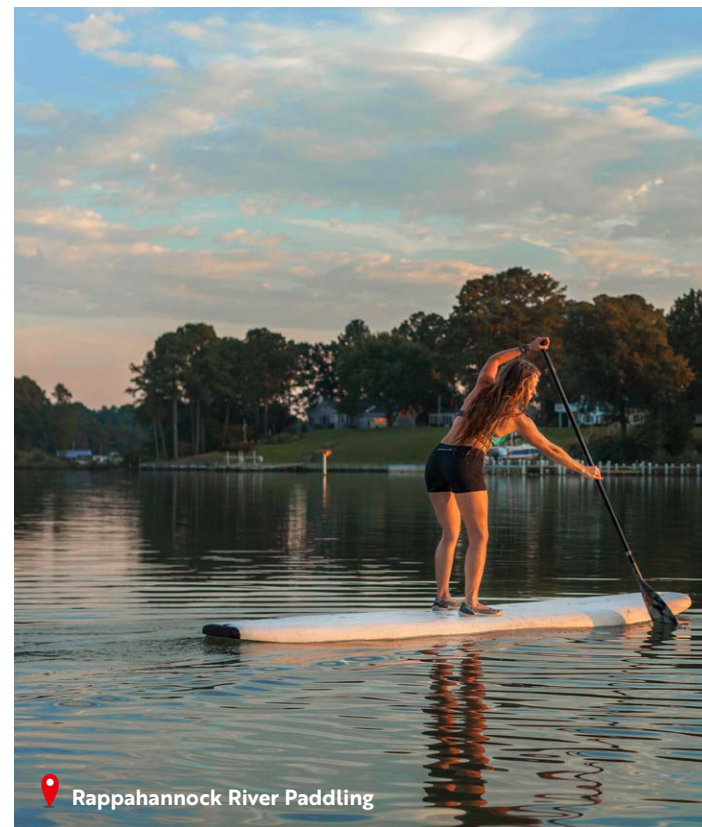
There is strong interest in developing new sports infrastructure, particularly youth fields and indoor-outdoor facilities that can support regional tournaments and events. These investments could serve as catalysts for hospitality growth, provided they are supported by affordable lodging and family dining options.

THREATS

Several external and internal threats may hinder tourism momentum in the Chesapeake Bay region. Competing destinations such as small towns in Maryland and the Carolinas, may draw visitors through more cohesive branding, stronger infrastructure, and broader access to water-based recreation.

Internally, ongoing population decline among working-age residents could benefit from greater access to affordable workforce housing. The price of housing poses a direct threat to the hospitality labor force, reducing service capacity, and ultimately, visitor satisfaction. Anti-growth sentiment and visible signals of exclusion present reputational risks that may deter both visitors and investors. Continued efforts to promote diversity, hospitality, and cultural sensitivity will help strengthen the region's appeal to a broader visitor base and encourage private-sector investment.

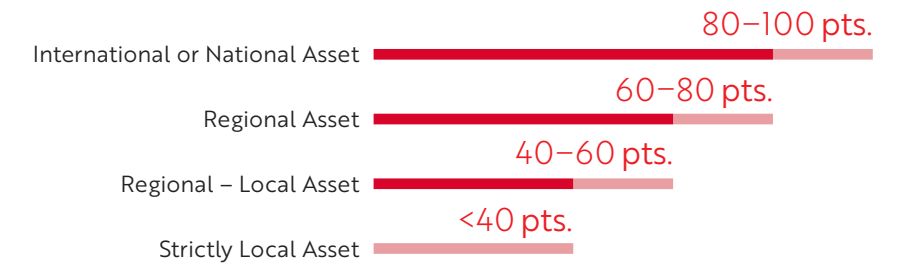
Seasonality remains a critical vulnerability. Many of the region's attractions, events, and outdoor assets are weather-dependent, leaving large portions of the year with minimal tourism activity. Without investment in year-round, indoor, and inclusive tourism infrastructure, the region risks being perceived as a short-season, low-service destination, losing market share to peers with more comprehensive offerings.



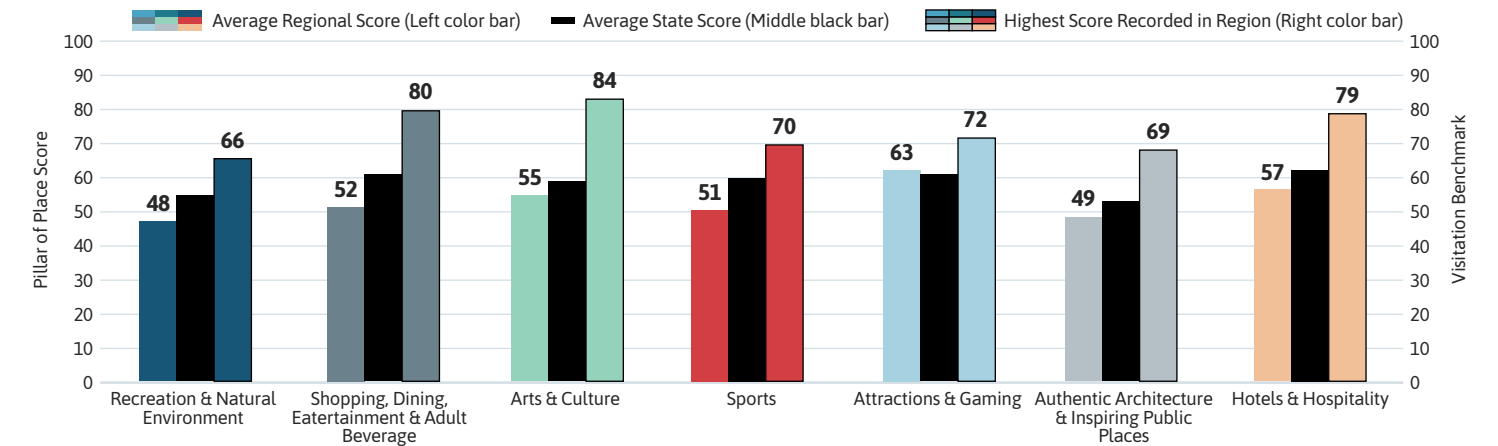
PILLARS OF PLACE – REGIONAL ASSET PERFORMANCE

VTC worked with stakeholders across the state in each region to identify relevant POIs for the tourism experience. Hunden scored and ranked the regional POIs as provided by VTC to analyze the regional performance of assets versus the average performance of assets across the state.

Assets were scored on a scale between 0 and 100 by a total of 20 different metrics. The scoring of assets was categorized in the following tiers shown on the right, while the regional pillar scores are shown in the table below:

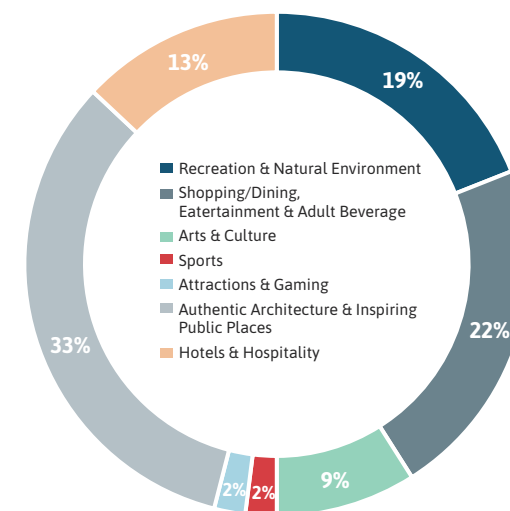


Pillars of Place Assessment | Chesapeake Bay



The following graphic details the number of POIs within each Pillar of Place within the region.

Pillars of Place Assessment | Total POIs by Pillar



The Pillars of Place analysis, the number of POIs within each Pillar, stakeholder feedback, and the region's current and future target audience were considered when identifying tactical recommendations for each region. Assets were individually assessed based on offerings and current effectiveness in attracting national and regional visitation to identify gaps within each Pillar. Within Chesapeake Bay, this analysis highlighted amount of assets and current scoring in the Entertainment, Conventions & Conferences, Sports, and Attractions & Gaming Pillars. Hunden identified tactical recommendations for specific Pillars to raise the regional pillar score with assets capable of attracting national and regional visitation.

Chesapeake Bay

TARGET AUDIENCE PROFILES

The target audience analysis for Chesapeake Bay was conducted on a sample of the top assets across the Pillars in the region to provide insight into the current visitor types, as well as those most aligned with the region's offerings to leverage for future growth. The audience profiles were analyzed through Placer.ai access to Experian customer data based on current visitation. The audience composition across Chesapeake Bay reveals a highly diversified yet complementary visitor base. The three dominant segments — Booming with Confidence, Golden Year Guardians, and Thriving Boomers — account for the majority of visitation across Chesapeake Bay's premier destinations. This distribution underscores the region's strength in attracting established, experience-oriented travelers who value history, nature, and relaxed coastal settings.

C

Booming with Confidence

The Booming with Confidence audience consists of prosperous, college-educated couples in their peak earning years who have secured stable, comfortable suburban living. Their spending skews toward travel, cultural outings, and classic home and lifestyle upgrades rather than trend-driven purchases. With strong incomes and established assets, they balance conservative tastes with selective indulgence in quality experiences. Booming with Confidence households are typically aged 51 to 65.

Q

Golden Year Guardians

Golden Year Guardians represent the oldest and most settled households, defined by modest fixed incomes, long-term homeownership, and quiet, community-centered lifestyles. They prioritize routine, health, and essential spending while avoiding technology, luxury, and high-cost travel. Their habits reflect caution in financial decisions and a strong attachment to tradition, favoring reliability and simplicity across all consumption choices. Golden Year Guardians are typically 76 or older.

E

Thriving Boomers

Thriving Boomers are upper-middle-class baby-boomer couples with stable suburban homes, approaching retirement with practical spending habits. They prefer domestic travel, outdoor recreation, and reliable home upgrades over status-driven goods. Technology adoption is cautious, but they engage selectively with both traditional and digital media. Thriving Boomers are typically aged 51 to 65.

Source: Placer.ai Experian Mosaic Segments

Primary in-state and nearby feeder markets include Northern Virginia, the Greater Richmond region, and the Fredericksburg area, which generate strong demand from affluent empty nesters and professionals seeking easily accessible weekend escapes. High-potential out-of-state markets include the Washington, D.C., metropolitan area and the Raleigh–Durham Research Triangle, where concentrations of Booming with Confidence households seek authentic coastal experiences that are quieter and less commercialized than traditional ocean resorts. Secondary feeder markets, including the Philadelphia metropolitan area, South Central Pennsylvania, and parts of Delaware, fall within a comfortable drive range and include significant populations of Golden Year Guardians and Thriving Boomers drawn to the region's maritime heritage, calm waters, and small-town pace.



REGIONAL PRIORITIES

Regional priorities for product development and Pillar of Place enhancement were formulated based on regional scoring metrics and stakeholder feedback from in-person workshops, Steering Committee meetings, and virtual Focus Group workshops.

Entertainment

Most programming in the Chesapeake Bay Region centered around seasonal festivals and outdoor events. The region needs mid-sized, flexible venues that support concerts, cultural programming, and year-round events. Future development, including the potential for existing businesses to expand on these offerings, should focus on adaptable spaces that align with culinary, arts, and waterfront assets to sustain year-round engagement.

Conventions & Conferences

The region's formal conference infrastructure exists in small community facilities and private venues. Investment should target modest-scale, multifunctional spaces that meet civic and business needs. These facilities should be paired with adjacent lodging and dining amenities in localities such as Gloucester, Kilmarnock, and Colonial Beach to support overnight visitation and off-season economic activity.

Recreation & Natural Environment

Chesapeake Bay's shoreline and waterways are among its greatest natural assets, yet public access remains severely restricted. Most waterfront land is privately owned, and accessible areas are often underutilized because of constrained parking, and insufficient signage and visitor amenities. The region needs strategic investment in new water access points, kayak launches, marina amenities, and equipment rentals. Upcoming investments such as Lancaster County's waterfront enhancements and the TriWay Trail will expand public access, strengthen blueway and greenway connectivity, and support multi-day outdoor recreation itineraries.

Shopping, Dining, Entertainment & Adult Beverage

The region offers a growing number of wineries, oyster experiences, and local farms but a cohesive identity and cross-promotional infrastructure are needed to elevate these assets. Dining options, particularly in rural areas, remain inconsistent in both quality and availability. Existing collaborative branding initiatives, most notably Virginia's River Realm, serve as a successful model for this coordination by connecting the region's "9 Charming Small Towns" with local dining and coastal experiences. Building on such models, the region should pursue a unified culinary and beverage brand that connects these experiences and local restaurants under a shared narrative. Expanding restaurant supply in waterfront towns and event hubs, paired with festivals and outdoor recreation, would strengthen destination experiences and extend visitor stays.

Arts & Culture

Cultural assets across the region, including museums, historical societies, and tribal events, are often fragmented and under-promoted. There is an opportunity to unify these offerings through regional itineraries, digital tools, and interpretive storytelling that highlight the area's maritime, Indigenous, and rural heritage. Connecting museums, galleries, festivals, and public art under shared themes will help build cultural identity, drive shoulder-season visitation, and strengthen community pride. Additionally, the Northern Neck's National Heritage Area designation creates a unifying framework for itineraries, interpretive storytelling, and cross-regional cultural programming.



Chesapeake Bay

REGIONAL PRIORITIES (CONT.)

Sports

The region is underserved in youth and amateur sports infrastructure, with few tournament-ready fields or indoor facilities. Stakeholders emphasized the importance of scalable, multi-use venues that serve both residents and visiting teams. Investment should focus on flexible complexes in localities with hospitality infrastructure and align with family-friendly accommodations and dining to form viable sports tourism clusters.

Attractions & Gaming

Beyond the Compass Entertainment Complex in Irvington, there are few indoor facilities or destination anchors across the region. There is an opportunity to introduce niche attractions, such as experiential entertainment or small-scale indoor recreation, that complement outdoor and seasonal offerings. Future development should prioritize locally grounded, curated experiences that reinforce regional identity rather than generic large-scale venues.

Authentic Architecture & Inspiring Public Places

Historic localities such as Urbanna, Kilmarnock, Mathews, Gloucester, and Tappahannock offer walkable, visually distinctive environments that are highly valued by both residents and visitors. These communities would benefit from targeted investment in pedestrian infrastructure, public gathering spaces, and activation strategies to support everyday use and seasonal programming. Improvements in signage, wayfinding, and visitor services would enhance navigability while preserving local character.

Hotels & Hospitality

Hotel capacity and distribution throughout the region could benefit from improvement. Although some boutique and chain properties exist, many are underutilized or not located near demand generators. Stakeholders identified the need for affordable, family-friendly accommodations to support sports tourism, events, and seasonal visitation. Investment should focus on increasing accommodations in areas with high tourism potential, targeting midscale hotels, inns, and alternative lodging such as cabins and campgrounds. Coordinated marketing, group bookings, and tourism partnerships would help increase occupancy and support new development.

COMPETITORS

Kentucky, Pennsylvania, North Carolina, Tennessee, and West Virginia were identified as Virginia's core competitive set. Within these states Chesapeake Bay's most relevant competitors by region include:

Maryland: Eastern Shore & Western Shore Towns

Chestertown, St. Michaels, Cambridge, Solomons Island

These towns reflect the Chesapeake Bay region's scale, maritime heritage, and water-based tourism character. They combine harbor-front walkability, seafood culture, boutique lodging, boating and heritage interpretation, and small-town authenticity. For the Chesapeake Bay region, they represent direct peer competition in attracting regional boaters, heritage tourists, and weekend visitors.

North Carolina: Outer Banks, Pamlico-Albemarle Peninsula, Brunswick and Pender Counties

Outer Banks offers a nature-focused coastal model that blends preserved barrier islands and maritime parks with indoor attractions, strong rentals, and off-season programming. It highlights the need for infrastructure that balances conservation with access, modest indoor venues, and curated itineraries.

The Pamlico-Albemarle Peninsula resembles the Chesapeake Bay Region in its rural waterfront towns, estuarine systems, and slower-paced tourism. With wildlife refuges, working waterfronts, and historic towns like Belhaven and Columbia, it demonstrates how to leverage natural assets for passive recreation and ecotourism.

Southport and Burgaw reflect Chesapeake Bay towns with walkable main streets, colonial architecture, and maritime access. Southport models heritage-driven tourism through ferry service, maritime museums, and lively retail districts. This approach underscores opportunities to enhance waterfront placemaking and year-round cultural programming.

South Carolina: Lowcountry

Beaufort, Bluffton, and Georgetown

The Lowcountry region competes directly with the Chesapeake Bay for the "Golden Year Guardians" and affluent retiree market, offering a similar landscape of salt marshes, tidal rivers, and historic waterfront districts. Towns like Beaufort and Georgetown mirror the architectural charm and walkable harborfronts found in Irvington or Urbanna, appealing to visitors seeking authentic Southern maritime history without the crowds of a major resort city.

However, the Lowcountry area distinguishes itself with a higher density of upscale hospitality investment, including luxury inns and planned communities like Palmetto Bluff that seamlessly blend conservation with high-end tourism.

Delaware: Historic Coast & River Towns

Lewes, Milton, and Bowers Beach

Delaware's historic coastal towns offer a compelling alternative for family and heritage travelers. Lewes, in particular, parallels the Chesapeake Bay's offering with its deep maritime history, preserved 18th-century architecture, and safe, calm water beaches on Delaware Bay. The shared "bayside" geography attracts a similar visitor profile interested in fishing, kayaking, and quiet relaxation rather than high-energy boardwalks.

COMPETITOR SUMMARY

The competitive landscape for the Chesapeake Bay Region consists of destinations that share its maritime heritage, estuarine geography, and relaxed pace, primarily within Maryland, North Carolina, South Carolina, and Delaware. These peer regions compete for similar audiences by offering historic waterfronts and nature-based recreation. Maryland's Eastern Shore and Delaware's coastal towns function as direct competitors for regional weekend visitors, while destinations in the Carolinas compete by pairing comparable natural assets with more built-out tourism infrastructure. The Lowcountry and Outer Banks, in particular, stand out for their higher concentrations of upscale lodging, more visitor-ready town centers, and stronger year-round programming. This contrast underscores the need for the Chesapeake Bay Region to better align its authentic rural character with modern visitor expectations for hospitality and walkability.



The Hatchery

Chesapeake Bay

TACTICAL RECOMMENDATIONS

Based on the Pillars of Place analysis and stakeholder feedback, Hunden recommends an emphasis on the following Pillars of Place for the enhancement of tourism in Chesapeake Bay:

Hotels & Hospitality

To increase overnight visitation and extend visitor spending, the Chesapeake Bay region must address lodging gaps across rural waterfront towns and event hubs. The seasonality, specialization, and scale of existing accommodations constrains the region's ability to support group travel, weddings, and multi-day stays. Expanding quality lodging is the most critical step toward establishing the region as a competitive weekend destination. Higher concentrations of upscale lodging in competing regions like the Lowcountry and Outer Banks underscore the need for additional "visitor-ready" infrastructure to capture affluent travelers.

- Prioritize authentic and midscale lodging in key opportunity areas, including Kilmarnock, Urbanna, Gloucester, Colonial Beach, and Tappahannock, with an emphasis on boutique inns, small-format branded hotels, and maritime-inspired properties.
- Encourage a mix of accommodation types, including family-friendly hotels, waterfront inns, and alternative lodging such as eco-lodges, glamping, cabins, and small-scale campgrounds.
- Pursue zoning and land-use flexibility, particularly near town centers and waterfronts, along with public-private partnerships to reduce development barriers.
- Coordinate incentives, small-area plans, and site-readiness strategies through regional economic development organizations to de-risk investment and clearly signal opportunities.
- Pair new lodging with dining and entertainment assets to form destination clusters that maximize returns from events, small weddings, and leisure travel.

Recreation & Natural Environment

Despite its vast coastal geography and identity tied to the water, the Chesapeake Bay region suffers from insufficient public access and underleveraged outdoor assets. Enhancing the quality and availability of public access points, boat launches, and trails is essential to capturing the Outdoor Recreation lure and serving the active target audiences.

- Collaborate across counties to secure and improve public water access through targeted property acquisitions, negotiated public easements, and infrastructure enhancements at existing marinas and landings.
- Expand and professionally promote parts of the Virginia Water Trails and other existing blueways under a unified Chesapeake Bay outdoor recreation brand, complete with safety information, clear signage, and mapped itineraries.
- Activate existing trailheads, kayak launches, and marinas with concession-based models that offer easy access to rentals, guided eco-tours, and basic food and beverage services, transforming access points into small visitor hubs.
- Invest in rural trail connectivity, cycling loops, and agritourism circuits that link water-based activities with farms, downtowns, and lodging clusters, providing diverse opportunities for visitors to explore the peninsulas.
- Support the visitor experience with comprehensive wayfinding systems, digital kiosks, and GPS-enabled itinerary tools that clearly connect recreational corridors to local dining, retail, and accommodations, minimizing traveler confusion in rural areas.

Shopping, Dining, Entertainment & Adult Beverage

The region's culinary and retail offerings are hyper-local but inconsistent in quality, availability, and coordination. Restaurant supply, operating hours, and seasonal closures confine visitor spending and overnight stays. The region's globally recognized oyster culture and growing beverage trails provide a strong, authentic foundation for strategic culinary tourism growth.

- Expand restaurant supply and diversity in key town centers and waterfront districts. This expansion should emphasize high-quality, year-round, family-friendly, chef-driven, and casual dining concepts that showcase local seafood and produce.
- Incentivize extended evening and weekend operating hours and strategically cluster restaurants near marinas, event venues, and historic districts to enhance walkability and increase cross-visitation between different asset types.
- Develop a cohesive and promotable food and beverage identity (e.g., The Virginia Oyster Trail) that highlights oyster traditions, crab culture, farm-to-table dining, and local beverage producers (breweries, wineries, distilleries).
- Implement branded culinary trails, restaurant networks, and marketing campaigns that effectively bundle dining experiences with lodging, recreation, and festivals, encouraging longer stays and higher spending.
- Consider micro-grant programs and small business development initiatives to support pop-up retail, mobile food vendors, and entrepreneurship within the downtown commercial districts, adding vibrancy and unique retail appeal.

CONCLUSION

The Chesapeake Bay region offers a distinctive mix of maritime heritage, scenic shorelines, and small-town character that appeals to visitors seeking authentic, restorative experiences. Converting this appeal into sustained economic growth requires addressing gaps in lodging, water access, and regional connectivity. To shift from a seasonal day-trip market to a cohesive multi-day destination, the region must invest in visitor-ready infrastructure that supports its outdoor and culinary assets while preserving its rural identity.

Strategic investment in boutique and midscale hospitality, expanded public waterfront access, and cohesive branding around the maritime heritage would position the region to attract affluent, experience-driven travelers. Anchored by oyster culture, historic landscapes, and a growing outdoor recreation network, the Chesapeake Bay is well positioned to emerge as a premier coastal escape. Preservation-focused placemaking and cross-jurisdictional collaboration will strengthen the visitor experience while supporting long-term community and working waterfront vitality.



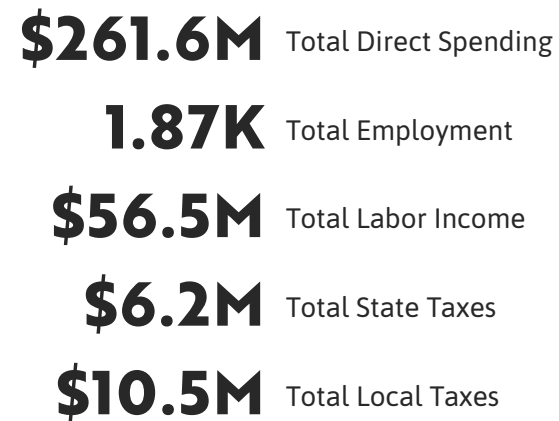
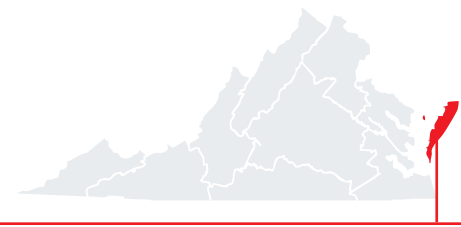
Coastal Virginia: Eastern Shore

STATE OF THE REGION

The Coastal Virginia-Eastern Shore Region is comprised of two counties, Accomack County and Northampton County, along with multiple small towns including Cape Charles, Onancock, and Chincoteague.

Virginia's Eastern Shore is a distinctive and captivating region, defined by its rich coastal heritage, agricultural landscapes, and small-town charm. This narrow peninsula between the Chesapeake Bay and Atlantic Ocean offers a unique blend of natural beauty and cultural depth. Its unspoiled beaches, sprawling wildlife refuges, and abundant waterways provide a haven for outdoor recreation, birding, and ecotourism, while historic towns and working waterfronts reflect centuries of maritime tradition. The Eastern Shore's fertile farmland and working waterfronts support a thriving agriculture and aquaculture economy, complemented by growing industries in renewable energy and sustainable development. With its scenic byways, historic landmarks, and welcoming communities, the region balances heritage, commerce, and hospitality. The region attracts visitors seeking coastal tranquility and businesses drawn to its strategic location and natural resources.

Based on the 2024 economic impact numbers prepared by VTC, the Eastern Shore Region generated the impacts above. The Eastern Shore region accounts for approximately 0.7 percent of the State's total impact.



Based on Hunden's Pillars of Place assessment and feedback accumulated from extensive stakeholder engagement, which included regional focus groups, industry-represented steering committee, individual interviews, and a region-specific survey, a SWOT analysis was prepared for the region.



STRENGTHS

The Eastern Shore's tourism offering is most strongly anchored by the Recreation & Natural Environment, Authentic Architecture & Inspiring Public Places, and Hotels & Hospitality Pillars. Assets within these categories represent the region's highest-performing Points of Interest (POIs) and closely align with VTC's primary visitor lures, including Beaches & Waterfront, Outdoor Recreation, Wildlife & Nature, History, and Downtown Experiences. Together, these assets support a tourism product centered on coastal recreation, heritage-based exploration, walkable town centers, and overnight leisure stays, reinforcing the Eastern Shore's appeal as an experience-driven coastal destination.

Recreation & Natural Environment

The Eastern Shore is defined by its iconic outdoor recreational assets, distinctive coastal identity, and natural beauty. Assets such as Assateague Island National Seashore and the uninhabited Barrier Islands showcase the region's diverse wildlife and expansive waterways that set the Eastern Shore apart from peer destinations. These resources serve as a foundation of the visitor experience and drive significant overnight and out-of-state visitation.

Authentic Architecture & Inspiring Public Places

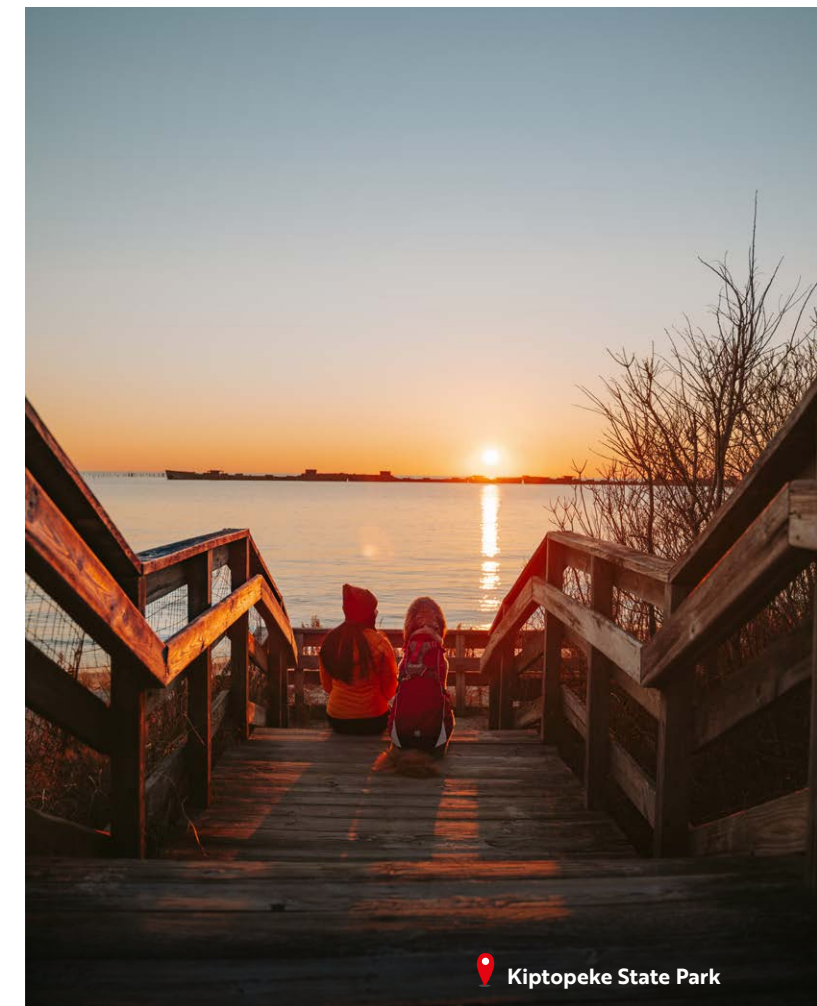
Spaces such as Onancock's Market Street, Cape Charles Historic District, and Tangier Island create memorable visitor experiences and bring to life the small-town authenticity that characterizes the region. These settings combine historic architecture, working waterfronts, and quaint hospitality, which creates an environment that appeals to leisure travelers and those seeking community-centered destinations. In addition, the strong commercial corridors provide support for many of the year-round events hosted throughout many communities on the Eastern Shore.

Hotels & Hospitality

The Eastern Shore offers a diverse mix of hotels and hospitality product, ranging from family camping resorts such as Chincoteague Bay RV Resort & Cottages and Cape Charles/Chesapeake Bay KOA Resort to boutique properties like Hotel Cape Charles, Refuge Inn, and the Inn at Onancock. Additional options across the region include chain properties and state park lodging, providing accommodations that serve a wide variety of visitor types.

WEAKNESSES

Travel accessibility remains a persistent challenge for the Eastern Shore, in terms of reaching the region and traveling within it. Visitors have no direct commercial airport access and only two main highway access points. Visitors may naturally choose to visit another destination that is easier to access. Gaps in supporting infrastructure such as restaurants, retail, and services exacerbated by staffing shortages, hinder extended visitor stays. While the region appeals to visitors seeking a slower-paced, small-town atmosphere, expectations for professional services and convenience are not always met, which can discourage certain visitors that expect a higher standard of service. Seasonal fluctuations intensify these issues, with demand more likely in summer than in winter. In addition, the region's heavy reliance on outdoor experiences highlights a lesser focus on indoor activities, arts and cultural products, especially catered to families that could sustain visitation during inclement weather and off-peak months.



Coastal Virginia: Eastern Shore

OPPORTUNITIES

Shopping, Dining, Eateertainment & Adult Beverage

The Eastern Shore has an opportunity to elevate its shopping and dining sector by enhancing the quality, variety, and differentiation of existing restaurants to better meet visitor expectations. Encouraging new restaurants, extended hours, and diverse culinary concepts would provide both residents and travelers with more choices, helping to sustain tourism in shoulder seasons and positioning dining as a stronger driver of overnight visitation.

Arts and Culture

The region is home to a vibrant network of artisans, small galleries, and community-based venues that contribute meaningfully to its cultural identity. Assets such as the Historic Onancock School and its artisan spaces, ESO Arts Center in Belle Haven, and historic theaters in Cape Charles, Chincoteague, and Onancock provide diverse creative outlets for residents and visitors alike. Additional venues, including the Chincoteague Center, the Do-Drop Inn, and The Impact Center, further enrich the region's artistic and cultural landscape. Continued product development in this area presents a clear opportunity to strengthen regional identity by expanding and connecting these existing assets with new cultural venues, galleries, and performance spaces that complement the natural and coastal environment. This also helps counter the region's weakness, a tendency for sensitivity to seasonality. Enhancing arts and cultural experiences is essential to broadening visitor appeal, extending length of stay, and balancing the region's reliance on outdoor recreation.

Entertainment

Entertainment on the Eastern Shore is anchored by a strong festival presence; however, the region is short on dedicated venues for concerts, performances, and touring shows. The recently opened Pavilion at the Historic Onancock School provides a valuable new outdoor venue and represents an important step toward expanding event infrastructure. Nevertheless, the region still faces a shortage of flexible, mid-sized indoor spaces that could host performances and touring acts year-round. Addressing this gap would not only attract a wider range of entertainment but also diversify the tourism product beyond seasonal outdoor events and provide residents with consistent programming throughout the year.

THREATS

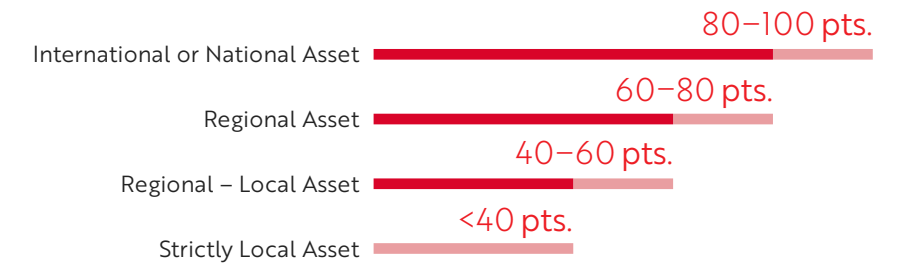
The Eastern Shore faces a few threats that may constrain its tourism potential. Rising operating costs and the undersupply of affordable workforce housing limit the ability of restaurants, retailers, and hospitality businesses to recruit and retain staff, directly impacting service levels and visitor satisfaction. At the same time, the region's dependence on outdoor assets makes it highly vulnerable to seasonality, weather disruptions, and environmental risks, which leaves gaps in year-round product and visitor appeal. Without investment in more diversified offerings and solutions to workforce challenges, the region risks losing competitiveness to peer coastal destinations with broader infrastructure and amenities.



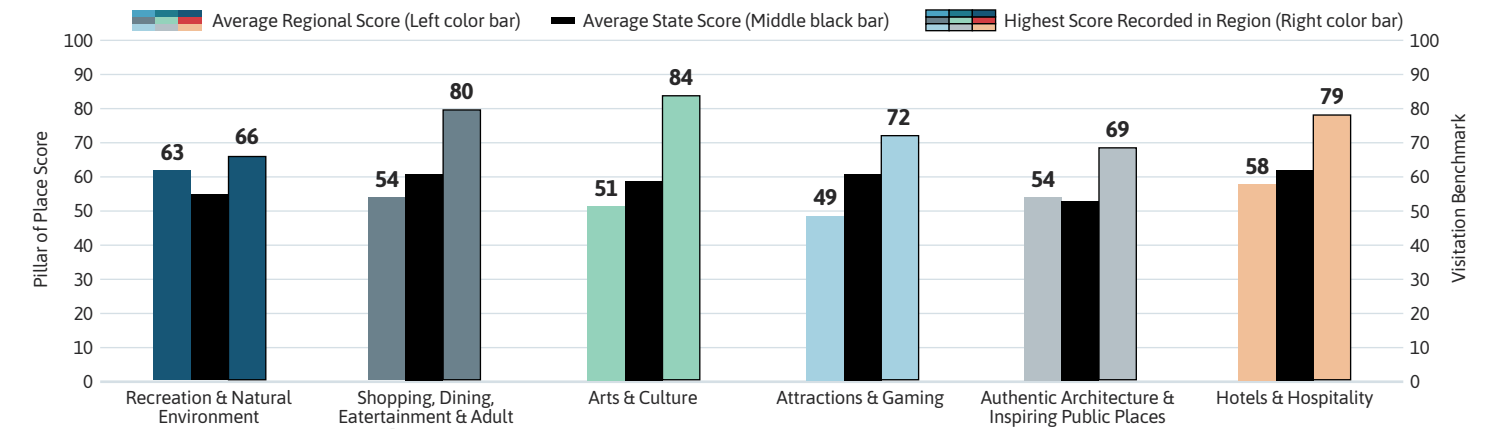
PILLARS OF PLACE – REGIONAL ASSET PERFORMANCE

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Assets were scored on a scale between 0 and 100 by a total of 20 different metrics. The scoring of assets was categorized in the following tiers shown on the right, while the regional pillar scores are shown in the table below:

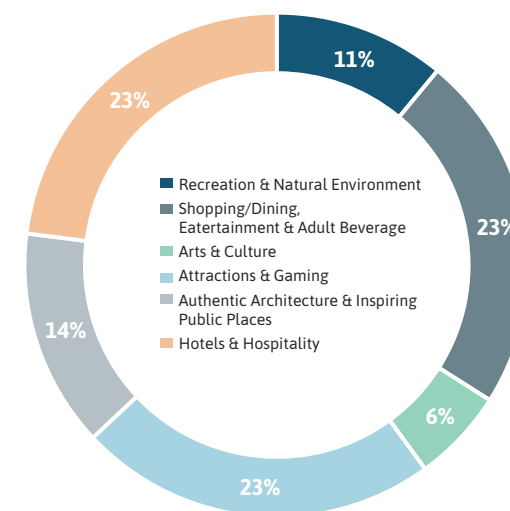


Pillars of Place Assessment | Coastal Virginia: Eastern Shore



The following graphic details the number of POIs within each Pillar of Place within the region.

Pillars of Place Assessment | Total POIs by Pillar



The Pillars of Place analysis, the percentage of POIs within each Pillar, stakeholder feedback, and the region's current and future target audience were considered when identifying tactical recommendations for each region. Assets were individually assessed based on offerings and current effectiveness in attracting national and regional visitation to identify gaps within each Pillar. Within the Eastern Shore, this analysis highlighted a modest supply of total assets and current scoring in the Entertainment, Conventions & Conferences, and Sports Pillars.

Coastal Virginia: Eastern Shore

TARGET AUDIENCE PROFILES

The target audience analysis for the Eastern Shore Region was conducted on a sample of the top assets across the pillars in the region to provide insight into the current visitor types, as well as those most aligned with the region's offerings to leverage for future growth. The audience profiles were analyzed through Placer.ai access to Experian customer data based on current visitation. The three dominant segments — Booming with Confidence, Autumn Years, and Golden Year Guardians — account for the majority of visitation across premier destinations.

C

Booming with Confidence

The Booming with Confidence audience consists of prosperous, established couples and families that value comfort, quality, and shared experiences. Their stability and affluence make them strong consumers or an ideal target for family-friendly lodging, agritourism, and outdoor recreation that blends relaxation with culture and nature. Top attractions include Assateague National Seashore and Downtown Chincoteague's Main Street.

J

Autumn Years

Mature, long-settled couples leading peaceful, community-centered lives in older, single-family homes. Rooted in tradition and financial security, they enjoy quiet routines filled with hobbies, reading, and outdoor pastimes. Loyal to familiar brands and conservative in lifestyle, they value stability and local ties.

Q

Golden Year Guardians

Golden Year Guardians are the nation's oldest households, composed of retirees living comfortably in long-owned homes or settled retirement communities. Financially cautious and traditional, they value security, community involvement, and familiar routines over novelty or technology. Top attractions include Onancock's Market Street and the Curtis Merritt Harbor.

Recalling the regional lures (History & Heritage, Beaches & Waterfront, Wildlife & Nature, Arts & Culture, Food & Beverage, and Downtown Experiences), the Eastern Shore's target audiences, comprised primarily of affluent couples, mature travelers, retirees, and families seeking slower-paced, experience-driven travel, align closely with the region's top-performing Points of Interest. These assets emphasize unspoiled natural environments, nationally significant wildlife refuges, historic town centers, working waterfronts, and locally rooted dining and cultural experiences that appeal to leisure travelers seeking authenticity, tranquility, and connection to place.

Primary in-state feeder markets for the Eastern Shore include Hampton Roads, the greater Richmond Region, and portions of Central Virginia, which generate steady visitation from couples, families, and retirees drawn to the region's beaches, outdoor recreation, small-town charm, and coastal heritage.

Adjacent out-of-state feeder markets include Maryland's Eastern Shore, suburban Maryland, and the Washington, D.C., metropolitan area, where households seeking quieter coastal getaways, nature-based experiences, and historic small-town destinations align well with the Eastern Shore's mix of wildlife, waterfront access, and heritage assets. These markets represent an important source of repeat visitation, particularly during shoulder seasons.

Additional secondary feeder markets within a comfortable drive range include Pennsylvania, Delaware, and portions of New Jersey, where mature households, affluent empty nesters, and nature-oriented travelers show strong propensity for short-break travel to destinations offering beaches, birding, ecotourism, scenic byways, and authentic downtown experiences with minimal congestion.

The following regional priorities highlight opportunities to enhance offerings tailored to the Eastern Shore's current target audiences while selectively attracting new visitor segments. The recommended product investments are intended to strengthen the region's competitive position relative to peer coastal and nature-based destinations within Virginia and the broader Mid-Atlantic, while preserving the character and scale that define the Eastern Shore's appeal.

REGIONAL PRIORITIES

Regional priorities for product development and Pillar of Place enhancement were formulated based on regional scoring metrics and stakeholder feedback from in-person workshops, Steering Committee meetings, and virtual Focus Group workshops.

Entertainment

Entertainment offerings on the Eastern Shore are largely centered on its strong events and festival calendar, which draw visitors year-round. Still, the region could benefit from dedicated entertainment venues capable of hosting concerts, performances, or touring acts. Investment in flexible mid-sized venues within larger hubs in the region such as Chincoteague could diversify entertainment offerings and provide additional indoor assets.

Conventions & Conferences

Improvements in the Eastern Shore's infrastructure are needed to accommodate large-scale venues or headquarters hotels to attract group business. The current level of infrastructure affects the region's ability to serve meetings, association gatherings, and other multi-day events. However, the area is mainly a leisure-driven market, and while meeting offerings could supplement that tourism, it likely would not be sustainable at a large scale because of accessibility constraints.

Hotels & Hospitality

Hotels & Hospitality on the Eastern Shore is anchored by a mix of campgrounds, boutique inns, and midscale hotels, supplemented by a robust short-term rental market that provides visitors with diverse lodging options. While modest hotel development could be supported in select locations, the strength of the short-term rental and vacation rental market, combined with the region's existing variety of supply, suggests that large-scale new hotel development is not currently warranted. Future opportunities lie in targeted, small-scale projects that enhance year-round lodging options without oversaturating the market.

Sports

Sports tourism on the Eastern Shore exists on a modest scale. Large-scale facility development is not recommended at this time given the region's size, infrastructure, and market constraints. However, opportunities exist to expand smaller-scale facilities that support community recreation and incremental tourism, such as multipurpose indoor spaces and outdoor amenities for sports like pickleball, which has grown in popularity nationally. These types of investments would strengthen local quality of life, provide modest visitor appeal, and align with the region's scale and resources.

Recreation & Natural Environment

The Eastern Shore's most competitive strength lies in its natural environment, anchored by Assateague Island National Seashore, Chincoteague National Wildlife Refuge, and the unspoiled Barrier Islands. Expanding recreational trail systems, such as advancing the development of the Eastern Shore Rail Trail, along with enhancing waterfront access and investing in marina and harbor amenities, would enable multi-day outdoor itineraries. Additionally, cycling rentals and guided tours would extend time for leisure travelers. Additional lodging linked to natural attractions would further encourage longer stays and strengthen the region's position as a premier nature-based destination.

Source: Placer.ai Experian Mosaic Segments



Coastal Virginia: Eastern Shore

REGIONAL PRIORITIES (CONT.)

Shopping/Dining, Entertainment & Beverage Experiences

The Eastern Shore offers a growing base of dining and beverage experiences, highlighted by seafood traditions and walkable downtown districts such as Cape Charles Main Street and Onancock's Main Street, both recognized Virginia Main Streets. Strong holiday programming, including Cape Charles's popular Festive Fridays, further enhances the region's small-town charm and seasonal appeal. However, the number of year-round restaurants and retail options shortens visitor stays and spending. Investment in additional restaurants, extended hours, and differentiated culinary concepts would provide visitors with more options across seasons, while curated food and beverage trails could reinforce the region's coastal identity and drive repeat visitation.

Arts & Culture

The Eastern Shore has a strong foundation of artisans, galleries, and performance spaces, including the Historic Onancock School, ESO Arts Center, and historic theaters in Cape Charles, Chincoteague, and Onancock. Additional venues such as the Chincoteague Center, Do-Drop Inn, and The Impact Center, reflect a rich creative community. Expanding and connecting these assets through new galleries, performance spaces, and interpretive centers tied to the region's maritime heritage would strengthen year-round visitation and diversify the tourism offering beyond outdoor recreation.


Attractions & Gaming

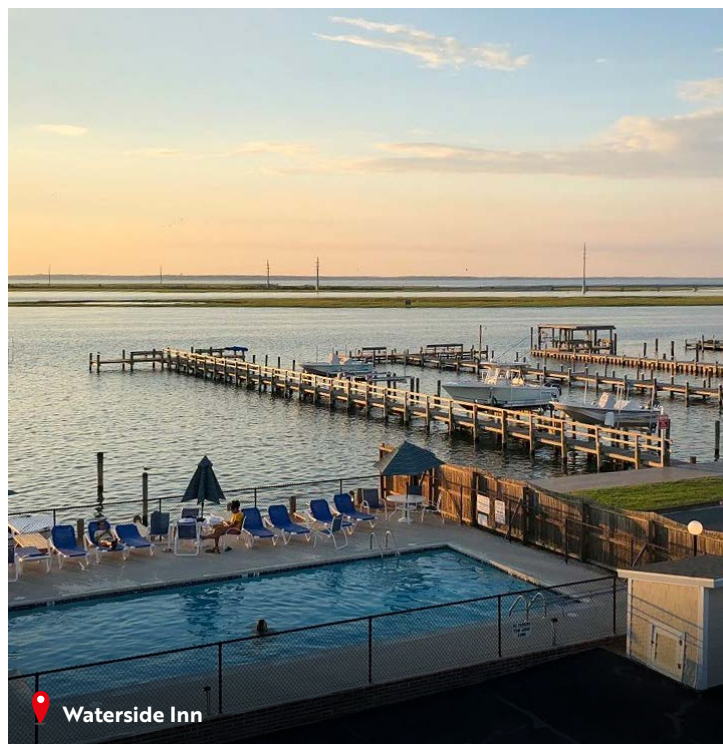
The Eastern Shore's attractions are primarily outdoors and family oriented. While these resources provide strong seasonal appeal, the region has an opportunity to add complementary indoor family entertainment options that could balance seasonality and extend visitor stays. Developing modest indoor attractions, such as interactive discovery centers or entertainment hubs, would strengthen the rainy-day alternatives, and ensure year-round relevance for both residents and visitors.

Authentic Architecture & Inspiring Public Places

The Eastern Shore's small towns and waterfronts are among its most distinctive assets. Cape Charles's beachfront and marina, Tangier Island, Onancock's Market Street, and Chincoteague's Historic Downtown all provide authentic settings that blend historic architecture with community gathering spaces. Continued investment in placemaking, public realm improvements, and storytelling within these town cores would strengthen their role as visitor hubs, encouraging exploration, shopping, and extended stays. Expanding connections through rail-to-trail initiatives would further link these communities, enhance walkability and cycling access, and create new opportunities for recreation and heritage-based tourism.



 The Jackspot at Sunset Beach



 Waterside Inn

COMPETITORS

Kentucky, Pennsylvania, North Carolina, Tennessee, and West Virginia were identified as Virginia's core competitive set. Within these states, the Eastern Shore's most relevant competitors by region include:


North Carolina: Outer Banks (specifically Ocracoke Island, Manteo, Hatteras Village), Crystal Coast

The Outer Banks offers a useful point of comparison for understanding how nature-led coastal destinations can balance preservation with tourism development. The region successfully integrates protected barrier-island assets such as lighthouses, wildlife habitats, and national seashore access with a modest supply of indoor attractions, including an aquarium and aviation heritage sites. While the Eastern Shore's character and scale are distinct, the Outer Banks model underscores the value of prioritizing conservation and view-shed protection, introducing selective indoor family attractions to mitigate weather risks, strengthening ferry and marina connectivity, and creating multi-day itineraries that link natural assets with authentic town centers such as Cape Charles, Onancock, and Chincoteague.

The Crystal Coast, encompassing Beaufort, Morehead City, and Atlantic Beach, provides another useful comparison for the Eastern Shore as a destination that combines preserved coastal environments with small-town authenticity. The region leverages Cape Lookout National Seashore and Shackleford Banks as natural anchors, supported by complementary indoor cultural and family attractions such as maritime museums, aquariums, and interactive waterfront experiences. Historic downtowns are activated with dock-and-dine amenities, walkable retail, and curated culinary districts that encourage visitors to stay beyond a single day. For the Eastern Shore, the Crystal Coast model demonstrates the value of pairing coastal recreation with modest indoor cultural assets, strengthening marina and harbor amenities, and curating dining and retail corridors to reduce seasonality and extend overnight visitation.

The Eastern Shore's competitive set demonstrates that successful coastal destinations extend the value of their natural assets through complementary shopping, arts, and entertainment offerings. Peer regions such as the Outer Banks and North Carolina's Crystal Coast show how modest indoor attractions, activated downtowns, curated retail corridors, and cultural institutions can mitigate seasonality, encourage longer stays, and broaden visitor appeal without compromising environmental integrity. These competitors reinforce the case for targeted investment in walkable shopping districts, local arts and cultural venues, and family-friendly entertainment on the Eastern Shore. These elements enhance the visitor experience, support local businesses, and convert day trips into multi-day visits while remaining consistent with the region's authentic small-town and coastal character.



 Chincoteague Pony Swim

Coastal Virginia: Eastern Shore

TACTICAL RECOMMENDATIONS

Based on the Pillars of Place analysis and stakeholder feedback, Hunden recommends an emphasis on the following Pillars of Place for the enhancement of tourism in the Eastern Shore.

Arts & Culture

- Network of Small, Indoor Cultural Venues: Expand and strengthen a connected network of compact museums, galleries, and interpretive spaces that reflect the Eastern Shore's maritime history, coastal ecology, and creative community. Priority assets include the Cape Charles Museum, Saxis Island Museum, Eastern Shore Watermen's Museum, Museum of Chincoteague Island, the Historic Onancock School, and ESO Arts Center.
- Adaptive Reuse of Civic & Waterfront Spaces: Convert or expand existing civic buildings and waterfront structures into indoor cultural venues such as ecology discovery centers, rotating gallery spaces, and interpretive exhibits to increase rainy-day and shoulder-season capacity.
- Regionwide Cultural & Heritage Trail: Establish a unified cultural and heritage trail connecting museums, galleries, performance spaces, and watermen heritage sites, supported by coordinated branding, signage, wayfinding, and digital mapping.

The Eastern Shore's cultural assets present a clear opportunity to expand year-round visitation and strengthen regional identity beyond outdoor recreation. Concentrating small-scale cultural venues within walkable town cores such as Cape Charles, Onancock, and Chincoteague will support consistent visitation while reinforcing small-town authenticity. Coordinated programming including seasonal artist residencies, interpretive workshops, and rotating exhibits, would create a cohesive cultural experience and extend visitor itineraries. Existing VA250-related driving tours provide a strong foundation for a formalized regional cultural trail that broadens visibility for smaller assets and encourages multi-stop exploration.

Entertainment

- Small- to Midsized Indoor Entertainment Venues: Develop flexible, indoor venues capable of hosting concerts, touring acts, lectures, cultural performances, and community events that complement the region's strong festival calendar.
- Strategic Hub-Based Development: Prioritize entertainment investment in key hubs such as Chincoteague (year-round visitation), Cape Charles (integration with dining and waterfront amenities), and Onancock (building on the cultural momentum of the Historic Onancock School).
- Flexible, Multi-Use Design: Focus on adaptable spaces that can accommodate a range of programming rather than single-purpose venues.

While the Eastern Shore benefits from a strong calendar of festivals and outdoor events, even greater improvement could occur with dedicated indoor entertainment venues that can support year-round programming. Investment in small- to midsized, flexible venues would diversify the tourism product, provide alternatives during inclement weather and off-peak months, and support local and regional performers. Embedding these venues within established town centers would extend evening activity, increase visitor spending, and strengthen the nighttime economy in ways that align with each community's character and scale.

Shopping, Dining, Entertainment & Adult Beverage

- Year-Round Restaurant & Retail Expansion: Encourage additional restaurants and retail businesses to operate year-round, extend evening hours, and introduce differentiated culinary concepts that better meet visitor expectations.
- Coastal Flavor Trail: Develop a curated regional food and beverage trail, highlighting seafood, aquaculture, watermen heritage, local farms, and signature dining districts.
- Downtown & Waterfront Concentration: Focus dining, retail, and beverage investments within walkable downtowns and waterfront areas such as Cape Charles' Main Street, Onancock's Market Street, and Chincoteague's commercial corridors.
- Dock-and-Dine & Culinary Programming: Expand dock-and-dine options and support waterfront culinary events and festivals that reinforce the region's maritime identity.

Although the Eastern Shore is known for its seafood traditions and coastal charm, restaurant variety, hours of operation, and seasonality constrain overnight stays and visitor spending. Expanding year-round dining and retail options would provide visitors with dependable experiences across seasons and position food and beverage as a stronger driver of tourism. A curated Coastal Flavor Trail would reinforce regional identity, encourage multi-stop exploration, and link downtowns, waterfronts, and rural producers. Concentrating these offerings in town centers would enhance walkability, integrate dining with culture and recreation, and reduce the region's reliance on peak summer visitation.

CONCLUSION

The Tactical Recommendations within Arts & Culture, Entertainment, and Shopping/Dining are primarily aligned with the Eastern Shore's existing target audiences, including mature couples, retirees, and affluent families seeking nature-based, heritage-driven, and small-town coastal experiences. Strategic investment in Arts & Culture and Entertainment, particularly through small-scale indoor venues, cultural programming, and connected heritage assets, presents an opportunity to broaden the visitor base by attracting shoulder-season and repeat visitors, while providing alternatives to weather-dependent outdoor activities.

The Eastern Shore is anchored by its beaches, wildlife refuges, working waterfronts, and historic towns. Despite its strong sense of place and appeal to visitors seeking tranquility and authenticity, the region remains highly seasonal and reliant on outdoor recreation. Investment in modest, appropriately scaled indoor cultural, entertainment, and dining experiences is essential to support year-round visitation, extend length of stay, and enhance visitor satisfaction without compromising the region's character.

The Eastern Shore is well positioned with a unique set of natural and heritage assets; however, gaps remain across key Pillars of Place, particularly in Entertainment, Arts & Culture, and year-round Shopping/Dining experiences, that limit the region's ability to fully capitalize on existing demand and compete with peer coastal destinations. Targeted, small-scale development within these Pillars would strengthen the region's tourism offering, support assets currently classified as regional attractions, and reinforce the Eastern Shore's role within VTC's hub-and-spoke framework.

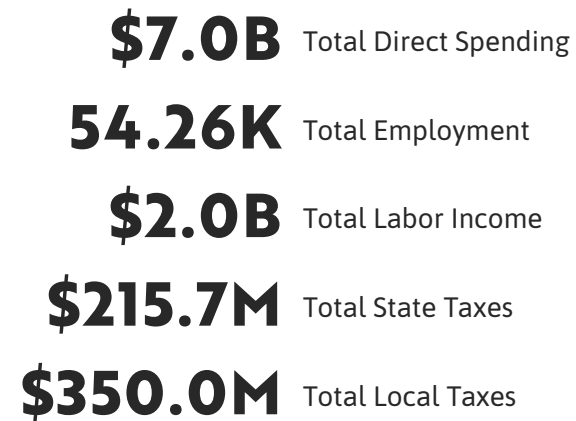


Coastal Virginia: Hampton Roads

STATE OF THE REGION

The Coastal Virginia – Hampton Roads Region is comprised of seven counties including James City, York, Isle of Wight, New Kent, Southampton, Charles City, and Surry. The region includes a diverse mix of cities and towns such as Chesapeake, Franklin, Hampton, Newport News, Norfolk, Portsmouth, Suffolk, Virginia Beach, Williamsburg, and smaller historic and rural communities including Smithfield. Together, these urban centers, waterfront towns, and rural areas reflect the region’s breadth, offering a combination of metropolitan amenities, historic villages, working farmland, and waterfront landscapes that contribute to Hampton Roads’ overall character and visitor appeal.

Hampton Roads is one of Virginia’s most dynamic regions, home to more than a dozen cities, towns, and counties. Anchored by its deepwater ports, naval presence, and proximity to Chesapeake Bay and the Atlantic Ocean, the region serves as both a global gateway and a vibrant coastal destination. Hampton Roads offers a rich mix of urban centers, historic landmarks, and waterfront communities, drawing leisure travelers to its beaches, cultural attractions, and the historic triangle of Williamsburg, Jamestown, and Yorktown. Beyond its urban and maritime appeal, the region’s rural areas showcase farmland, waterways, and natural beauty that support agritourism and outdoor recreation, creating a balance of heritage, commerce, and hospitality that attracts both visitors and businesses.



Based on the 2024 economic impact numbers prepared by VTC, the Hampton Roads Region generated the impacts above. The Hampton Roads region accounts for approximately 20 percent of the State’s total impact.

Based on Hunden’s Pillars of Place assessment and feedback accumulated from extensive stakeholder engagement, which included regional focus groups, industry-represented steering committee, individual interviews, and a region-specific survey, a SWOT analysis was prepared for the region.

STRENGTHS

The Hampton Roads Region’s tourism offering is most strongly anchored by the Arts & Culture, Authentic Architecture & Inspiring Public Places, Entertainment, Attractions & Recreation, and Shopping/Dining, Eatertainment & Beverage Experiences Pillars. Assets within these categories represent the region’s highest-performing Points of Interest (POIs) and closely align with VTC’s primary visitor lures, including History & Heritage, Beaches & Waterfront, Theme Parks & Attractions, Live Entertainment, Food & Beverage, and Downtown Experiences. Together, these assets support a tourism product centered on large-scale attractions, cultural and historic exploration, waterfront recreation, and vibrant urban and town-center activity, reinforcing Hampton Roads’ role as a multifaceted coastal destination capable of serving both leisure and group travel markets.

Arts & Culture

Hampton Roads is steeped in nationally significant history and culture, anchored by assets such as Colonial Williamsburg, the Chrysler Museum of Art, Fort Monroe, Historic Jamestowne, Jamestown Settlement, The Mariners’ Museum and Park, and the American Revolution Museum of Yorktown. These assets, paired with a rich maritime heritage and strong cultural institutions, attract heritage travelers and cultural tourists alike. The region also features a vibrant performing arts scene, with venues like the Ferguson Center for the Arts, The NorVa, and the Sandler Center for Performing Arts hosting nationally recognized performances.

Authentic Architecture & Inspiring Public Places

The region blends historic authenticity with coastal charm. Iconic public spaces such as the Virginia Beach Boardwalk, Norfolk’s Waterside District, and Colonial Williamsburg provide immersive visitor experiences. These settings combine centuries-old architecture with engaging outdoor spaces, creating an environment that resonates with both leisure and business travelers.

Entertainment

Hampton Roads is a proven performer in entertainment, with venues like Hampton Coliseum, Scope Arena, and the Veterans United Home Loans Amphitheater drawing large-scale events and national touring acts. These are complemented by outdoor venues like Town Point Park and the Portsmouth Pavilion, enhancing the region’s appeal for live music, festivals, and special events. Sports-related entertainment includes Colonial Downs and teams such as the Norfolk Tides and Norfolk Admirals.

Attractions & Gaming

Major destinations like Busch Gardens Williamsburg, Norfolk Botanical Garden, the Virginia Aquarium & Marine Science Center, and the Virginia Zoo provide high-value visitor experiences that serve as significant regional draws.

Shopping, Dining, Eatertainment & Beverage Experiences

Hampton Roads offers a mix of experiences, from the boutique shopping of Merchants Square to regional wineries such as The Williamsburg Winery, and Upper Shirley Vineyards. Additional shopping of note includes the Williamsburg Premium Outlets and Norfolk Premium Outlets. Its culinary scene continues to grow, with waterfront dining and seasonal food festivals drawing both visitors and locals.

WEAKNESSES

Hampton Roads’ geography is defined by peninsulas, rivers, and waterways. This makes bridges and tunnel crossings essential but also a significant barrier to visitor movement. Frequent congestion at major crossings such as the Hampton Roads Bridge-Tunnel (HRBT) and Monitor-Merrimac Memorial Bridge-Tunnel can create long delays, especially during peak travel seasons, weekends, and major events, discouraging multi-stop exploration and complicating logistics for group travel, conventions, and sporting events. These choke points not only affect leisure travelers but also add cost and complexity for meeting planners and tour operators. Currently, the HRBT is undergoing a \$3.9-billion expansion, which is the largest highway construction project in Virginia’s history. Additionally, the region could benefit from more public transit options and connectivity between key tourism areas to ease access and lengthen visitor stays. Together, these transportation challenges diminish the overall visitor experience and constrain the region’s ability to maximize the economic impact of its diverse tourism assets.



Colonial Williamsburg

Coastal Virginia: Hampton Roads

OPPORTUNITIES

Conventions & Conferences

Expanding convention capacity through a new, full-service headquarters hotel with a minimum of 500 guest rooms and 40,000–50,000 square feet of ballroom and improved meeting space is a top opportunity. Enhancing the scale and amenities of convention infrastructure would allow Hampton Roads to compete more directly for major events and corporate meetings, diversifying the visitor base and increasing year-round tourism.

Sports

The Virginia Beach Sports Center, Hampton Virginia Aquaplex, and Boo Williams Sportsplex are strong foundational assets, but there is room to grow the region's sports tourism capacity. Investment in larger multipurpose indoor and outdoor facilities could elevate Hampton Roads as a destination for regional and national youth tournaments and sporting events. The 200,000-square-foot Greater Williamsburg Sports & Events Center, planned to open in 2026, will help to address this gap, but additional capacity is needed to stay competitive.

Hotels & Hospitality

Development of additional high-end hotels and boutique lodging, especially near historic districts and waterfront areas, would enhance the visitor experience and increase capacity for conventions, group travel, and luxury leisure segments. This additional development would complement existing supply that includes The Historic Cavalier Hotel and Beach Club in Virginia Beach, as well as the Williamsburg Lodge and Williamsburg Inn at Colonial Williamsburg, both in Williamsburg.

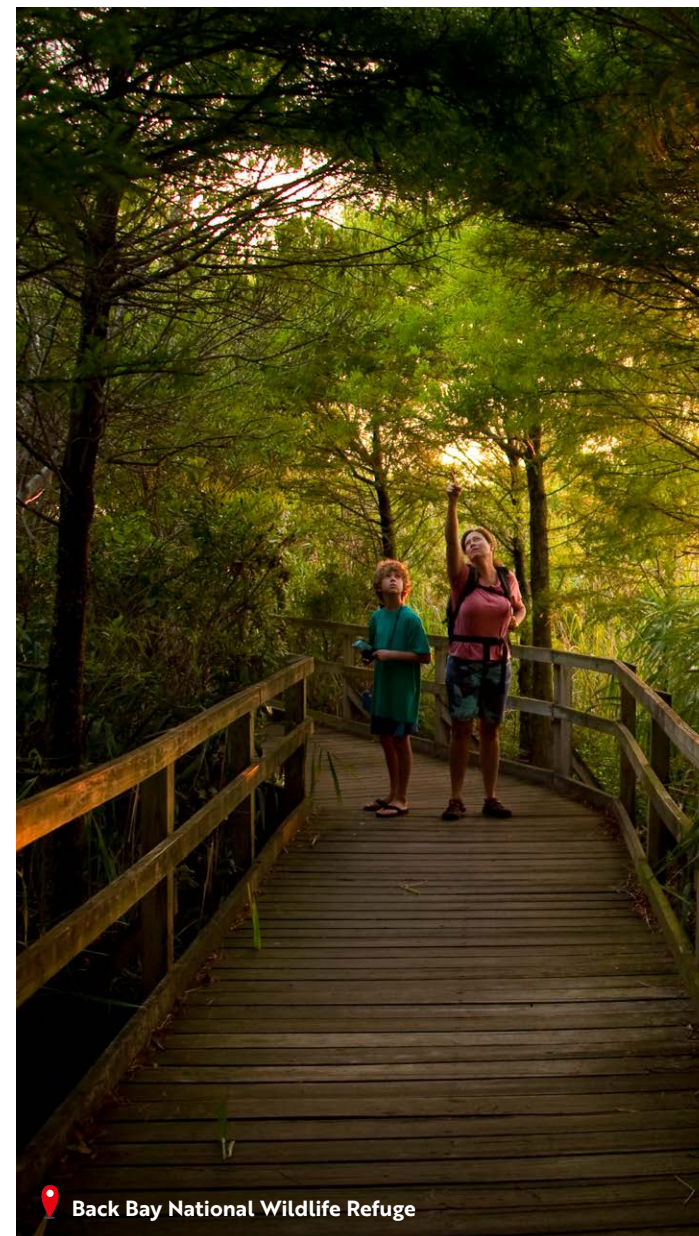
Entertainment

While Hampton Roads performs well in large-scale entertainment, existing anchor venues such as Scope Arena and Hampton Coliseum have yet to undergo the modernization of contemporary facilities in competing markets. Their age and outdated amenities constrain the region's ability to attract top-tier touring acts, national events, and large conventions seeking premium, multipurpose spaces. Adding modern, flexible facilities would not only enhance visitor experience and event capacity but also strengthen the region's ability to host a broader range of concerts, cultural programming, and private events. In addition, developing smaller and mid-sized multipurpose venues in urban cores, such as The NorVa, particularly in areas that don't offer such facilities, could further diversify the event landscape, attract more frequent touring acts, and support seasonal festivals and regional programming.

THREATS

Hampton Roads faces strong competition from Charleston, South Carolina, Savannah, Georgia, and coastal North Carolina, which are investing heavily in boutique hospitality, waterfront development, and cohesive tourism branding. These competitors are targeting similar leisure and group markets.

As a coastal region, Hampton Roads is more sensitive to seasonal visitation fluctuations and potential weather-related disruptions and impacts, which can affect year-round revenue stability and planning.

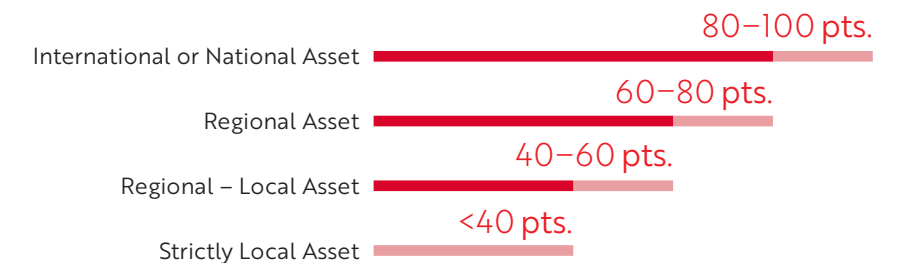


Back Bay National Wildlife Refuge

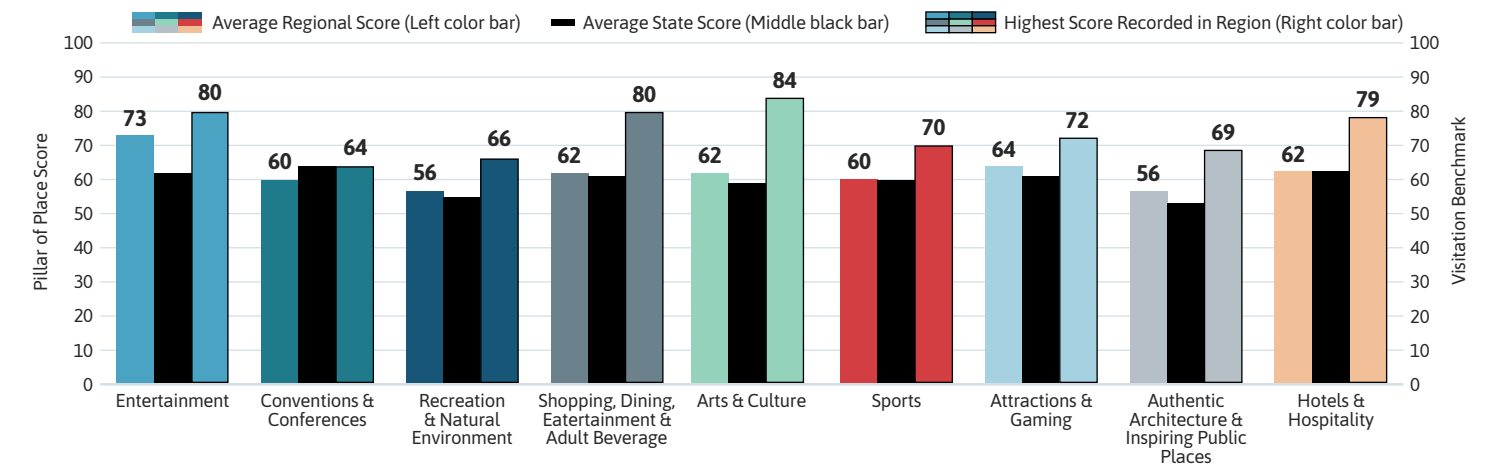
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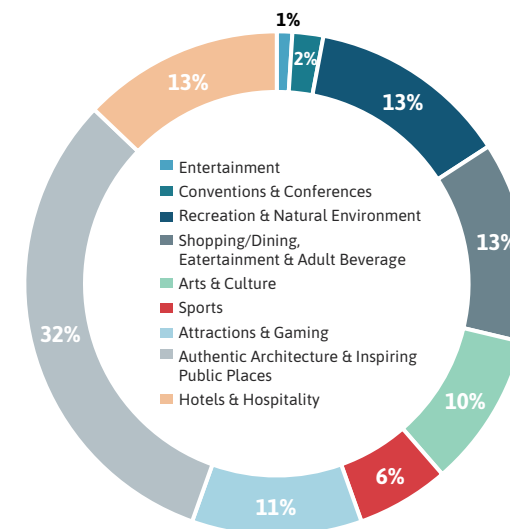


Pillars of Place Assessment | Coastal Virginia: Hampton Roads



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Pillars of Place Assessment | Total POIs by Pillar



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Coastal Virginia: Hampton Roads

TARGET AUDIENCE PROFILES

The target audience analysis for Hampton Roads was conducted on a sample of the top assets across the Pillars in the region to provide insight into the current visitor types, as well as those most aligned with the region's offerings to leverage for future growth. The audience profiles were analyzed through Placer.ai access to Experian customer data based on current visitation. The audience composition across Hampton Roads reveals a highly diversified yet complementary visitor base. The three dominant segments — Booming with Confidence, Singles and Starters, and Suburban Style — account for the majority of visitation across premier destinations. The distribution represents the region's ability to attract both affluent, experience-driven travelers and younger, socially active audiences seeking authentic experiences that reflect local culture, heritage, and quality of life.

C

Booming with Confidence

The Booming with Confidence audience consists of prosperous, established couples and families that value comfort, quality, and shared experiences. Their stability and affluence make them strong consumers or an ideal target for family-friendly lodging, agritourism, and outdoor recreation that blends relaxation with culture and nature.

O

Singles and Starters

Younger Singles and Starters are most common at attractions such as The NorVa, Busch Gardens Williamsburg, and the Virginia Beach Town Center. They are social, digital, and trend-driven, with spending reflecting emerging independence. This group seeks authentic and vibrant settings with entertainment, dining, and nightlife options. Appealing to this audience through creative marketing, modernized options, and walkable, mixed-use environments can boost engagement and repeat visitation.

D

Suburban Style

The Suburban Style group represents diverse, middle-aged families and couples building comfortable lives in established suburban neighborhoods. They balance career growth, family routines, and active social lives, valuing convenience, stability, and time together. Tech-savvy and brand-conscious, they respond well to incentives and loyalty programs.

Source: Placer.ai Experian Mosaic Segments

Recalling the regional lures (History & Heritage, Beaches & Waterfront, Arts & Culture, Food & Beverage, Attractions, and Downtown Experiences), Hampton Roads' target audiences are comprised of affluent families, multigenerational leisure travelers, young professionals, and socially active adults, aligning closely with the region's top-performing Points of Interest. These assets emphasize nationally significant history, large-scale attractions, cultural institutions, waterfront recreation, destination dining, and entertainment experiences that appeal to both leisure and group travel markets.

Primary in-state feeder markets for Hampton Roads include the greater Richmond region, Central Virginia, and Northern Virginia, which generate consistent visitation from families, couples, and young professionals drawn to the region's beaches, historic sites, theme parks, festivals, and coastal lifestyle. These markets benefit from strong highway connectivity and established travel patterns that support both weekend and extended stays.

Adjacent out-of-state feeder markets include North Carolina metropolitan areas such as Raleigh-Durham, the Research Triangle, and the Outer Banks region – as well as portions of southern Maryland – where households seeking coastal vacations, family-oriented attractions, and heritage experiences align well with Hampton Roads' mix of waterfront recreation, historic destinations, and entertainment offerings. These markets represent a strong base for repeat leisure visitation and seasonal travel.

Additional secondary feeder markets within a comfortable drive range include Washington, D.C., suburban Maryland, Philadelphia, and southern Pennsylvania, where dense populations of Booming with Confidence, Singles and Starters, and Suburban Style show strong propensity for short-break and vacation travel to destinations offering beaches, immersive history, major attractions, walkable districts, and a diverse dining and entertainment scene.

The following regional priorities highlight opportunities to enhance offerings tailored to Hampton Roads' current target audiences while attracting new visitor segments. The recommended product investments are intended to strengthen the region's competitive position relative to peer coastal and heritage destinations within Virginia's and the Mid-Atlantic's most competitive tourism markets.

REGIONAL PRIORITIES

Regional priorities for product development and Pillar of Place enhancement were formulated based on regional scoring metrics and stakeholder feedback from in-person workshops, Steering Committee meetings, and virtual Focus Group workshops.

Entertainment

Hampton Roads' entertainment offerings are anchored by major venues such as Hampton Coliseum, Veterans United Home Loans Amphitheater, and Scope Arena, which consistently attract large-scale events and touring acts. However, these facilities are aging, hampering the region's competitiveness for top-tier events and premium touring acts. Investment in upgrades or redevelopment of these venues, coupled with the addition of smaller multipurpose entertainment spaces in dense urban cores that do not offer such facilities, would expand programming opportunities, attract more frequent live events, and support conventions, festivals, and cultural gatherings. In addition to urban venues, smaller-scale entertainment and event spaces in rural communities such as New Kent, Surry, and Southampton counties (including fairgrounds, heritage sites, and adaptive reuse of historic buildings) could support community festivals, regional events, and seasonal programming that complement the region's larger venues while dispersing visitation across the region.

Conventions & Conferences

The region's current convention infrastructure, amount of exhibit space, and absence of a true headquarters hotel with adequate overflow accommodations, affect its ability to satisfy meeting planners. The region's venues like the Virginia Beach Convention Center and Hampton Roads Convention Center currently cannot accommodate large-scale conventions, trade shows, and meetings. This is largely due to those missing headquarters hotel rooms and additional quality product nearby. Expansion of meeting and event space, paired with development of a full-service headquarters hotel, is a critical priority to elevate Hampton Roads as a meetings and group travel destination. Additionally, transportation to shuttle attendees to and from events can be improved.

Recreation & Natural Environment

The region's waterfront location and natural assets remain underutilized. Expanding recreational infrastructure, waterfront access, and water-based activities would enhance Hampton Roads' appeal as a seasonal destination. Investments in outdoor recreation amenities and enhanced connectivity between natural areas and urban attractions, such as strengthening links to the Virginia Capital Trail, could significantly extend visitor

stays and spending.

Shopping, Dining, Entertainment & Adult Beverage

Hampton Roads offers a strong foundation of culinary, beverage, and retail experiences, from Merchants Square, the Virginia Beach Oceanfront, and the Waterside District to local wineries and waterfront dining. Building on this foundation with curated culinary districts, trails, and signature events can further differentiate the region and drive expenditures. The region's culinary heritage is equally significant, especially in Surry and Smithfield, with deep historical roots in Virginia ham, peanuts, and other traditional foodways that reflect its agricultural legacy. This agricultural legacy is most strongly experienced in the region's rural counties, where farms, wineries, breweries, distilleries, and roadside markets can be further connected through curated agritourism and beverage trails linking urban dining districts with rural producers. Hampton Roads also played an early and influential role in the development of craft beverages in America, particularly wine, spirits, and beer, offering an authentic narrative that connects modern culinary innovation to the region's historic past.

Arts & Culture

With globally recognized historical sites, museums, and cultural venues, Hampton Roads is well positioned to strengthen its reputation as a cultural hub. Enhanced programming, marketing, and cross-regional cultural trails linking sites such as Colonial Williamsburg, Fort Monroe, and Bacon's Castle would elevate this Pillar and attract both domestic and international visitors.



Coastal Virginia: Hampton Roads

REGIONAL PRIORITIES (CONT.)

Sports

Hampton Roads has a growing sports tourism base supported by assets such as the Virginia Beach Sports Center, Hampton Virginia Aquaplex, and Boo Williams Sportsplex. However, the region can add scale and diversity of facilities needed to compete nationally for major youth and amateur tournaments. The development of the Greater Williamsburg Sports & Events Center will help to address this gap. Existing outdoor sports complexes such as Warhill Sports Complex are frequently at capacity, and expansion efforts would increase hosting capacity, improve event logistics, and elevate the region's sports tourism profile. Rural areas within the region may also offer opportunities for future outdoor sports expansion, where larger land availability could support tournament-scale facilities while easing development pressure in more urbanized locations.

Attractions & Gaming

Flagship attractions like Busch Gardens Williamsburg and Norfolk Botanical Garden anchor the region's leisure appeal, but potential exists to expand family-oriented attractions, experiential tourism, and entertainment districts. Future development should focus on diversifying the region's attraction mix to appeal to a broader audience and drive multi-day stays.

Authentic Architecture & Inspiring Public Places

Hampton Roads' historic fabric and waterfront public spaces are major assets that differentiate the region. Key destinations such as Town Point Park, Nauticus and the USS Wisconsin, and the Norfolk Cruise Terminal further enhance this waterfront appeal and provide opportunities for both leisure and maritime tourism. Enhancing these areas through placemaking investments, public realm improvements, and interpretive storytelling can further elevate their draw for visitors and residents alike.

Hotels & Hospitality

The development of both high-capacity, full-service hotels and distinctive boutique properties is needed to support the region's tourism growth. A headquarters hotel adjacent to major convention facilities would significantly enhance group travel competitiveness, while boutique properties near historic districts, waterfronts, and agritourism areas would enrich the visitor experience and appeal to higher-spending leisure travelers. High-end and luxury hotel products have also been identified as a growth area for the region.

COMPETITORS

Kentucky, Pennsylvania, North Carolina, Tennessee, and West Virginia were identified as Virginia's core competitive set. Within these states, Hampton Roads' most relevant competitors by region include:

North Carolina: Outer Banks, Wilmington

The Outer Banks and Wilmington regions of North Carolina represent some of Hampton Roads' closest competitors in the coastal leisure and heritage tourism space. Both regions leverage their waterfront locations, maritime history, and relaxed beach town environments to attract families, couples, and experience-seeking travelers. The Outer Banks is renowned for its pristine natural environment, lighthouses, and ecotourism experiences, while Wilmington combines historic downtown charm with growing opportunities for a riverfront entertainment district and coastal recreation. Both destinations compete directly with Hampton Roads for visitors seeking beach vacations, heritage experiences, and outdoor recreation. Wilmington's recent investments in boutique hotels, riverwalk amenities, and culinary districts have strengthened its competitive position, while the Outer Banks' emphasis on high-quality natural and cultural experiences appeals to many of the same traveler demographics targeted by Virginia Beach and Williamsburg.

Tennessee: Chattanooga and Smoky Mountains

Chattanooga and the greater Smoky Mountains region represent instructive competitors for Hampton Roads not because of similar geographies, but because of their success in packaging outdoor assets with sports, entertainment, and family-oriented attractions to drive year-round visitation. Chattanooga has repositioned itself as a dynamic mid-sized destination by leveraging its riverfront, investing in signature attractions such as the Tennessee Aquarium, and developing walkable entertainment districts that support festivals, events, and spectator activities. The nearby Smoky Mountains, one of the most visited national park areas in the U.S., demonstrate how a nature-based destination can significantly expand visitation through trail systems, scenic drives, gateway towns, and large-scale event programming that appeals to families and multigenerational travelers. Chattanooga has intentionally positioned itself as an outdoor sports and active recreation hub. The city hosts and supports endurance events, cycling, trail running, rowing, climbing, and river-based competitions that draw participants and spectators year-round. Its riverfront and surrounding natural assets are programmed for organized sporting events and tournaments, not just passive recreation. This makes Chattanooga a strong analog for how Hampton Roads could better leverage its waterfronts, parks, and trails for sports tourism.

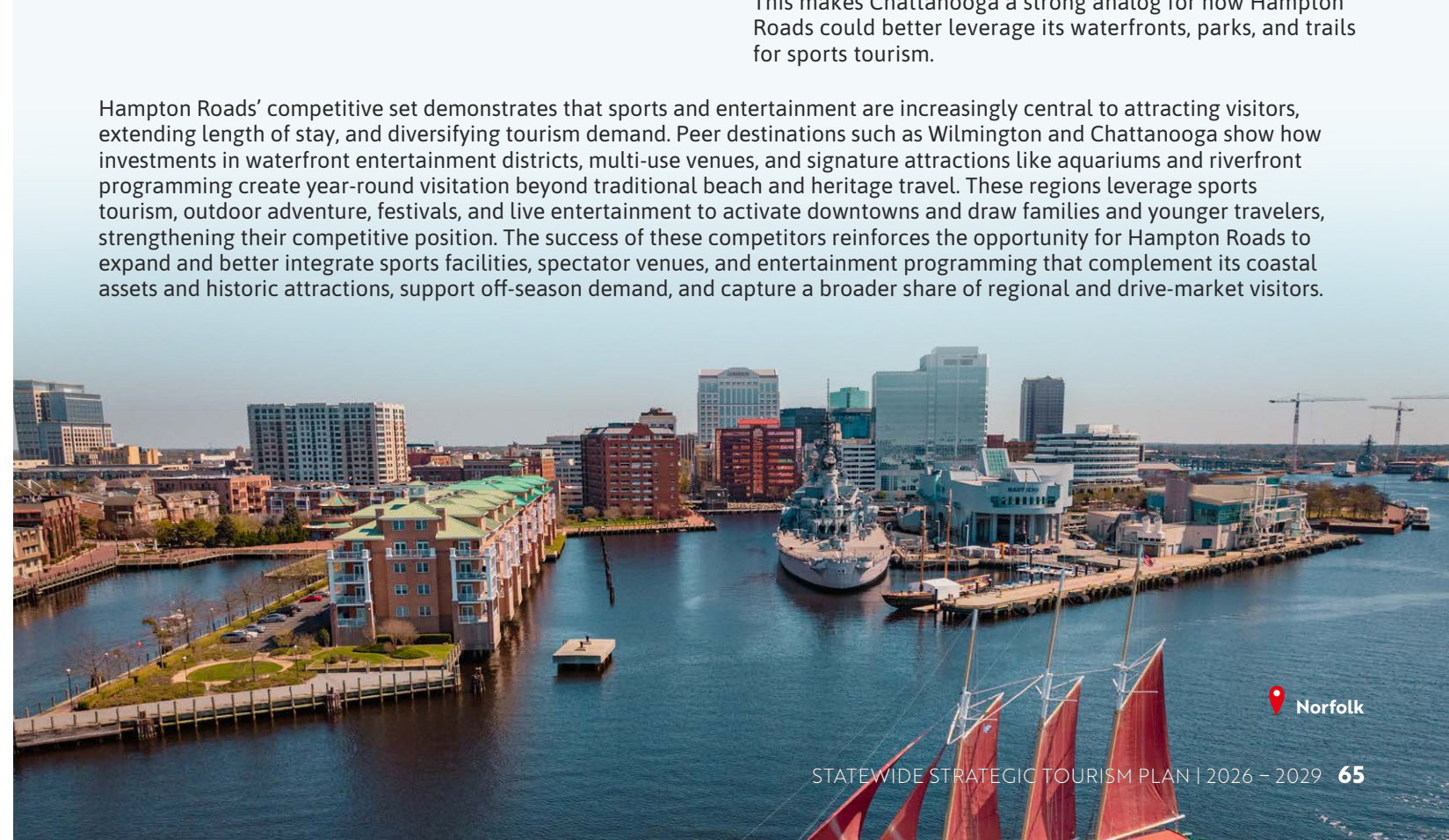
Hampton Roads' competitive set demonstrates that sports and entertainment are increasingly central to attracting visitors, extending length of stay, and diversifying tourism demand. Peer destinations such as Wilmington and Chattanooga show how investments in waterfront entertainment districts, multi-use venues, and signature attractions like aquariums and riverfront programming create year-round visitation beyond traditional beach and heritage travel. These regions leverage sports tourism, outdoor adventure, festivals, and live entertainment to activate downtowns and draw families and younger travelers, strengthening their competitive position. The success of these competitors reinforces the opportunity for Hampton Roads to expand and better integrate sports facilities, spectator venues, and entertainment programming that complement its coastal assets and historic attractions, support off-season demand, and capture a broader share of regional and drive-market visitors.



Busch Gardens Williamsburg



Cavalier Resort



Norfolk

Coastal Virginia: Hampton Roads

TACTICAL RECOMMENDATIONS

Based on the Pillars of Place analysis and stakeholder feedback, Hunden recommends an emphasis on the following Pillars of Place for the enhancement of tourism in Hampton Roads:

Sports

- **Indoor Multipurpose Sports Complex:** A large-scale indoor facility is needed, capable of hosting basketball, volleyball, cheer and dance, wrestling, pickleball, and non-sporting events such as expos and community gatherings. The upcoming Greater Williamsburg Sports & Events Center will address many of the region's indoor sports needs and should be positioned as a central hub for year-round tournament programming.
- **Outdoor Sports Complex:** Establish a comprehensive outdoor complex with a minimum of 12 turf multipurpose fields and/or baseball and softball diamonds capable of hosting regional and national youth tournaments in a single location.
- **Feasibility Study:** Conduct a regional feasibility study to determine the optimal size, location, phasing, and partnership structure for both indoor and outdoor sports facilities to maximize utilization, economic impact, and return on investment.

Hampton Roads has a strong foundation for sports tourism anchored by assets such as the Virginia Beach Sports Center, Hampton Virginia Aquaplex, Harbor Park, and the region's beaches, which function as natural sports venues for marquee events including the North American Sand Soccer Championships, the Jackalope Festival, Virginia Beach Jeep Fest, and major marathons. However, the region can improve the scale, diversity, and centralized capacity required to consistently attract large regional and national youth and amateur sports events. Many tournaments are forced to use multiple venues across cities, creating operational inefficiencies and a diminished visitor experience. Strategic investment in centralized indoor and outdoor sports complexes would enable Hampton Roads to compete more effectively, complement existing assets such as Warhill Sports Complex, and significantly increase year-round visitation and economic impact.

Entertainment

- **Major Venue Renovation or Redevelopment:** Comprehensive modernization of flagship venues such as Hampton Coliseum and Scope Arena to improve flexibility, production capabilities, acoustics, premium seating, and hospitality amenities.
- **Small- and Midsized Multipurpose Entertainment Venues:** Development of indoor venues in dense urban cores that can host touring acts, cultural performances, private events, and convention-related programming.

Hampton Roads' entertainment offering is anchored by large legacy venues that have historically attracted major concerts and events but now face competitive disadvantages due to age, design limitations, and outdated amenities. These constraints limit the region's ability to attract premium touring acts and national-scale events. Modernizing existing venues and adding a network of smaller, flexible indoor spaces would increase event frequency, support group travel and conventions, strengthen the nighttime economy, and reinforce Hampton Roads' position as a year-round entertainment destination.

Hotels & Hospitality

- **Headquarters Hotel & Convention Hotel:** Development of a full-service hotel with a minimum of 500 guest rooms and 40,000–50,000 square feet of ballroom and meeting space, directly connected to a major convention facility such as the Virginia Beach Convention Center or Hampton Roads Convention Center.
- **Boutique & Lifestyle Hotels:** Expansion of distinctive boutique hotel offerings in historic districts, waterfronts, and experiential destinations including Williamsburg, Norfolk, Smithfield, and Virginia Beach, with additional opportunities in underrepresented areas such as New Kent, Surry, and Charles City.
- **Developer Outreach & Incentives:** Proactive engagement with development partners and operators to raise awareness of authentic hospitality opportunities aligned with Hampton Roads' heritage, waterfront character, and tourism goals.

The Hampton Roads hospitality market is constrained by two key gaps: the absence of a true headquarters hotel capable of supporting large-scale conferences and conventions, and a shortage of distinctive boutique lodging options that appeal to higher-spending leisure travelers. The predominance of properties with these gaps hampers the region's ability to extend stays and capture premium demand, particularly in historic and experiential submarkets. The development of a headquarters hotel would significantly enhance the region's competitiveness for group business, while expanded boutique and lifestyle lodging would strengthen coverage across the region, support emerging destinations, and elevate the overall visitor experience.

CONCLUSION

The Tactical Recommendations within Sports, Entertainment, and Hotels & Hospitality are primarily aligned with Hampton Roads' existing leisure-oriented target audiences, including families, group travelers, and event-driven visitors drawn to the region's beaches, waterfronts, and cultural amenities. Strategic investment in Sports, particularly through large-scale indoor and outdoor tournament facilities, also presents a significant opportunity to broaden the visitor base by attracting regional and national youth sports participants and their families, introducing new audiences to the region's existing lures and encouraging repeat visitation beyond peak beach seasons.

Hampton Roads has long functioned as one of Virginia's most recognizable coastal destinations, anchored by its Atlantic beaches, military presence, port activity, and historic and cultural assets. Despite its strong brand recognition and year-round population base, the region is missing the modern Entertainment and Hotels & Hospitality infrastructure required to consistently attract premium touring acts, large-scale conferences, and multi-day group travel. Investment in modernized entertainment venues and the development of a true headquarters hotel with integrated meeting and convention space is necessary to support group demand, enhance the region's competitiveness, and unlock higher-value visitation tied to conferences, conventions, and major events.

Hampton Roads is well positioned with a diverse set of tourism assets and serves as one of the Commonwealth's highest-impact tourism regions; however, gaps remain across key Pillars of Place that limit its ability to fully capitalize on existing demand and compete with peer coastal and urban destinations. Targeted development within Sports, Entertainment, and Hotels & Hospitality would strengthen the region's ability to host year-round events, support assets currently classified as regional and national attractions and reinforce Hampton Roads' role as a hub destination under VTC's hub-and-spoke framework that drives longer stays, increased visitor spending, and more balanced seasonal performance.

Northern Virginia

STATE OF THE REGION

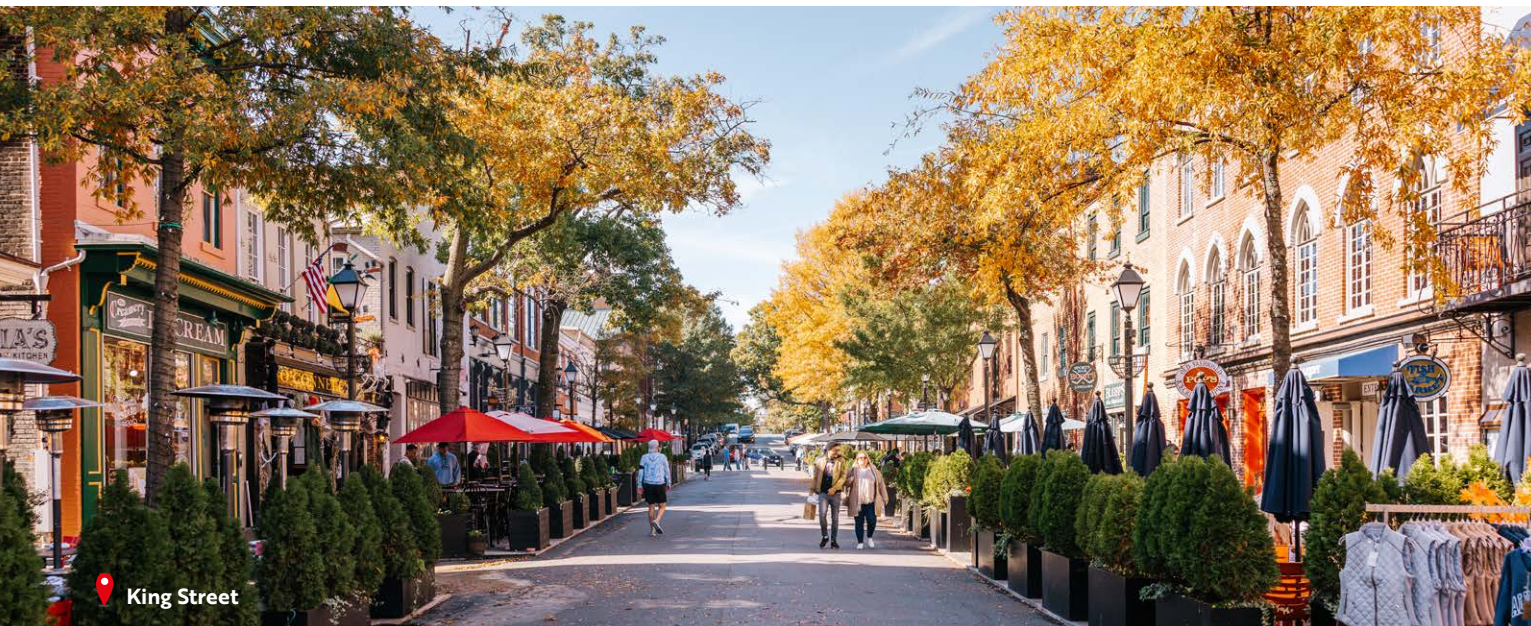
The Northern Virginia region is comprised of ten counties including Arlington, Caroline, Culpeper, Fairfax, Fauquier, Prince William, Loudoun, Stafford, Spotsylvania, Rappahannock, and the independent city of Alexandria. Northern Virginia is the state's most populated region with slightly more than 3 million residents. The region is anchored by the Dulles and Reagan Airports and its proximity to Washington, D.C. Due to its diversity of urban, suburban, and rural environments, Northern Virginia offers upscale hospitality, shopping, dining, and entertainment districts that attract both leisure travelers and business visitors. Beyond its urban appeal, the region extends into Loudoun, Stafford, Spotsylvania, Caroline, Culpeper, Rappahannock, and Fauquier, where Virginia's wine country and agritourism thrive, offering recreational assets within proximity to urban assets.

Based on the 2024 economic impact numbers prepared by VTC, the Northern Virginia Region generated approximately 48 percent of the state's total tourism impact. The following metrics provide further economic impact highlights.



\$16.7B Total Direct Spending
82.40K Total Employment
\$4.5B Total Labor Income
\$387.5M Total State Taxes
\$686.4M Total Local Taxes

Based on Hunden's Pillars of Place assessment and feedback accumulated from extensive stakeholder engagement, which included regional focus groups, industry-represented steering committee, individual interviews, and a region-specific survey, a SWOT analysis was prepared for the region.



King Street

STRENGTHS

The region's diverse mix of tourism offerings stands out most among the Arts & Culture, Shopping/Dining, Eatertainment & Beverage Experiences, and Authentic Architecture & Inspiring Public Places Pillars. Assets within these categories scored as the strongest POIs across the region and have significant overlap with many of VTC's identified lures for the region, including History, Shopping, Winery/Brewery, Food, and Downtown.

Arts & Culture

Northern Virginia is flush with national and internationally recognized cultural assets from various areas of the nation's history, reinforcing its role as a gateway to the nation's capital. Signature attractions such as George Washington's Mount Vernon estate, Steven F. Udvar-Hazy Center, and National Museum of the Marine Corps anchor the region's cultural offering, while venues like Wolf Trap National Park for the Performing Arts, the Torpedo Factory Art Center, and the Hylton Performing Arts Center highlight a strong contemporary arts presence. Together, these assets position arts and culture as a primary driver of visitation and year-round demand.

Shopping, Dining, Eatertainment & Adult Beverage

Northern Virginia offers a highly diversified mix of shopping, dining, and consumer beverage experiences shaped by its urban centers, historic districts, and rural landscapes. Visitors can enjoy chef-driven dining and nationally recognized culinary experiences (including a two-star Michelin

restaurant) in places such as Old Town Alexandria, alongside upscale shopping in dense, mixed-use environments and destination retail centers. The region also features the highest concentration of wineries in the Commonwealth, complemented by craft breweries such as Port City Brewing Company, creating a robust food-and-beverage ecosystem that appeals to affluent leisure travelers, social travelers, and day-trip visitors alike.

Authentic Architecture & Inspiring Public Places

Northern Virginia contains a dynamic mix of upscale, mixed-use districts, and historic downtowns that provide visitors a range of experiences. These assets are complemented by upscale resorts such as Lansdowne in Leesburg and experiential destinations like Marriott Ranch, allowing the region to seamlessly connect authentic architecture, outdoor space, and cultural activity across urban, suburban, and rural settings. The region blends arts and culture with authentic architecture and public space for unique experiences unlike any other region in the state.

WEAKNESSES

Transportation and traffic are notable weaknesses within the Northern Virginia tourism experience. Traffic congestion and mobility challenges are a hurdle for tourists' ability to experience multiple POIs throughout a day. Amtrak and the Washington Metropolitan Area Transit Authority (Metro) train lines help with regional and inter-regional connectivity, but car traffic and accessibility remained a top response from stakeholders in in-person interviews and virtual stakeholder sessions. Additionally, while the region benefits from its asset diversity, there is a consequent need for a central identity relative to other regions within Virginia's competitive set of states.



Great Falls National Park



Downtown Fredericksburg

Northern Virginia

OPPORTUNITIES

Northern Virginia has the density and critical mass to support large-scale tourism asset development and needs assets capable of attracting repeat visitation. The region's current strengths provide visitors with a unique cultural and leisure experience, but the utility of generating consistent repeat visitation remains a challenge. Based on current gaps and opportunities in the market, opportunities in multiple Pillars of Place were identified.

Conventions & Conferences

As a major economic hub within the state supported by two international airports, the region ought to include conference and convention assets with associated lodging supply. The demand for the development of conference and convention space ranked as one of the most consistent themes among stakeholders across the region.

Sports

The region produces a high volume of sports tourism with its current supply but loses a high volume of business from sports tourism events due to the absence of tournament caliber indoor and outdoor youth sports assets. The demand for the development of indoor and outdoor youth sports assets ranked as one of the most consistent themes among stakeholders across the region.

Hotels & Hospitality

Due to the region's geographic diversity, needs in hotel and hospitality vary by city and county. The region faces a dual lodging gap involving boutique accommodations in rural areas and insufficient full-service, group-oriented hotels in its urban centers. Arlington's newly opened Hilton Arlington Rosslyn The Key, fills a gap in the market, but other cities in Northern Virginia recognize the need for additional supply of full-service hotels accompanied by a convention center to fulfill the currently lost business.

Entertainment

Jiffy Lube Live, EagleBank Arena, the Wolf Trap National Park for the Performing Arts, and NOVA Live attract touring acts into the region, generating consistent out-of-state visitation. The region performs strongly in large-scale entertainment assets, but has opportunities for smaller, multipurpose entertainment venues in its denser urban cores.

THREATS

While Northern Virginia benefits from its location next to Washington, D.C., as another national tourism hub, this influences the region's ability to have its own identity. Northern Virginia's competitive regions have built brands upon their identities and continue to invest in assets that align with their strategic initiatives.

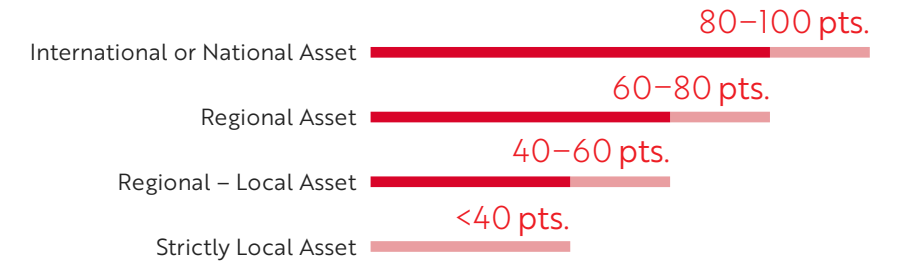
Government and corporate travel are heavily influenced by activity within Washington, D.C., which can cause unpredictable shifts in activity in the region.



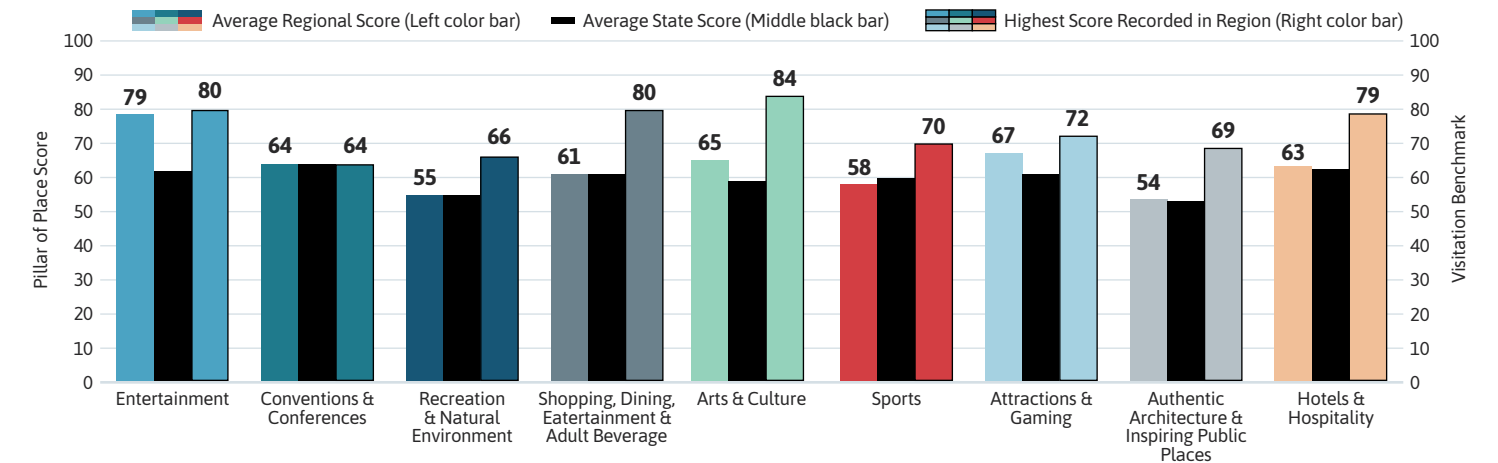
PILLARS OF PLACE – REGIONAL ASSET PERFORMANCE

VTC worked with stakeholders across the state in each region to identify relevant POIs for the tourism experience. Hunden scored and ranked the regional POIs as provided by VTC to analyze the regional performance of assets versus the average performance of assets across the state.

Assets were scored on a scale between 0 and 100 by a total of 20 different metrics. The scoring of assets was categorized in the following tiers shown on the right, while the regional pillar scores are shown in the table below:

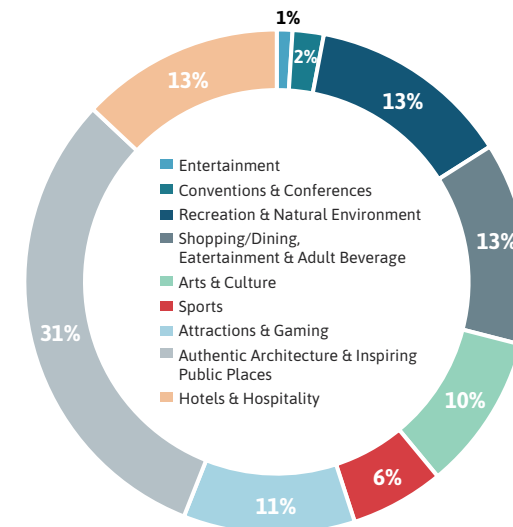


Pillars of Place Assessment | Northern Virginia



The following graphic details the number of POIs within each Pillar of Place within the region.

Pillars of Place Assessment | Total POIs by Pillar



The Pillars of Place analysis, the number of POIs within each Pillar, stakeholder feedback, and the region's current and future target audience were considered when identifying tactical recommendations for each region. Assets were individually assessed based on offerings and current effectiveness in attracting national and regional visitation to identify gaps within each Pillar.

Within Northern Virginia, this analysis highlighted the total assets of total assets and current scoring in the Convention and Conferences, Sports, Hotels and Hospitality, and Entertainment Pillars. Hunden identified tactical recommendations for specific Pillars to raise the regional pillar score with assets capable of attracting national visitation.

Northern Virginia

TARGET AUDIENCE PROFILES

The target audience analysis for the Northern Virginia was developed using a sample of the region's top-performing assets across the Pillars to understand the current visitor types and identify audiences most aligned with the region's offerings to leverage for future growth. The audience profiles were analyzed through Placer.ai access to Experian customer data based on current visitation. The three dominant segments within Northern Virginia include Power Elite, Young City Solos, and Flourishing Families. These three segments account for the highest percentage of visitation to the top POIs aligned with the regional lures. The distribution highlights Northern Virginia's distinct position at the intersection of affluence, proximity, and cultural access, appealing simultaneously to high-spend experiential travelers and younger audiences drawn to socially vibrant, locally rooted offerings.

A

Power Elite

The Power Elite group represents the most affluent households with average incomes exceeding \$250,000 and defined by influence, education, and refined living. These accomplished professionals are visitors who value refined yet authentic experiences, suggesting opportunities to expand premium offerings, such as curated culinary events, private heritage tours, and elevated lodging and wellness experiences.

G

Young City Solos

The Young City Solos audience consists of urban professionals who live fast-paced, career-focused lives in major cities. They prize independence and social engagement while gravitating toward brands that embody innovation, sustainability, and a sense of prestige. With active routines and limited free time due to affinities to professional enhancement, Young City Solos have a tendency toward impulsive spending; they prioritize convenience, memorable experiences, and stylish products in their purchases. Young City Solos are typically aged 31–35 with incomes ranging \$75,000 – \$100,000.

B

Flourishing Families

Flourishing Families include affluent, college-educated parents that prioritize comfortable suburban lifestyles supported by strong financial stability. They place a high value on family, health, and travel, directing much of their spending toward their children and active lifestyles. Travel tendencies tend to skew toward educational and recreational opportunities. Spending is balanced between long-term financial security and limited, selective premium purchases. Flourishing Families are typically aged 36–45 with heads of the household earning incomes ranging \$125,000 – \$150,000.

Source: Placer.ai Experian Mosaic Segments

Recalling the regional lures (History, Shopping, Winery/Brewery, Food, and Downtown), these target audiences, primarily consisting of affluent young families and young professionals, align with the region's current top POIs that emphasize history, arts and culture, education, luxury food and beverage and hospitality offerings, and entertainment.

Primary in-state feeder markets for Northern Virginia include the greater Richmond region, Hampton Roads, and suburban areas of Central Virginia, which generate steady visitation from affluent professionals, young adults, and families drawn to Northern Virginia's cultural attractions, entertainment districts, and proximity to national landmarks.

Adjacent out-of-state feeder markets include the Washington, D.C. metropolitan area and suburban Maryland counties such as Montgomery, Prince George's, and Howard, as well as south-central Pennsylvania communities including York, Lancaster, and Harrisburg, where higher-income households, young urban professionals, and family travelers align closely with Northern Virginia's mix of arts and culture, sports, shopping, dining, and educational attractions.

Additional secondary feeder markets within a comfortable drive range include New York City, Philadelphia, Pittsburgh, and Raleigh-Durham, where dense populations of Power Elite professionals, Young City Solos, and Flourishing Families show strong propensity for short-break travel to destinations offering world-class museums, walkable urban experiences, family-friendly attractions, and easy regional accessibility.

The following regional priorities highlight the opportunities to enhance offerings catered toward the current regional target audience and attracting new target audience groups. Product recommendations were outlined to better position Northern Virginia against its regional competitors within Virginia's top competitive statewide markets.



REGIONAL PRIORITIES

Regional priorities for product development and Pillar of Place enhancement were formulated based on regional scoring metrics and stakeholder feedback from in-person workshops, Steering Committee meetings, and virtual Focus Group workshops.

Entertainment

Jiffy Lube Live, EagleBank Arena, the Wolf Trap National Park for the Performing Arts, and NOVA Live attract touring acts into the region, generating consistent out-of-state visitation. The region performs strongly in large-scale entertainment assets, but has opportunities for smaller, multipurpose entertainment venues in its denser urban cores.

Conventions & Conferences

As a major economic hub within the state supported by two international airports. Although the region is a major economic hub within the state supported by two international airports, the region has no significant conference and convention assets with associated lodging supply. The demand for the development of conference and convention space ranked as one of the most consistent themes among stakeholders across the region.

Recreation & Natural Environment

The southern and western boundaries of the region serve as major hubs for recreational tourism. Assets in areas of the region that border Shenandoah Valley, Central Virginia, and Chesapeake Bay, are in need of additional boutique hospitality developments to bolster tourism impacts. Northern Virginia has yet to fulfill the high demand for waterfront activity opportunities along the Potomac River.

Shopping, Dining, Entertainment & Adult Beverage

Visitors to Northern Virginia can experience shopping, dining, and consumer beverage experiences in a myriad of fashions due to the diverse geographic landscapes of the region. Northern Virginia provides visitors with high-end shopping experiences in dense mixed-use developments, highly-regarded restaurants (including a two-star Michelin restaurant), and the highest concentration of wineries in the state.

Arts & Culture

Northern Virginia is flush with nationally and internationally recognized cultural assets from various areas of the nation's history. Arts and culture serve as a major driver for the region with a multitude of museums, venues like the Hylton Performing Arts Center, historic battlefields, and monuments.

Sports

The region produces a high volume of sports tourism with its current supply but loses a high volume of business from sports tourism events due to the absence of indoor and outdoor youth sports assets. The demand for the development of indoor and outdoor youth sports assets ranked as one of the most consistent themes among stakeholders across the region.

Attractions & Gaming

The development of the Kalahari Resort in Spotsylvania diversifies the region's major attraction supply and will also assist in filling the gap for the region's needed convention and conference space. Other attractions such as Kings Dominion in a neighboring region, Central Virginia, accommodate visitor demand in proximity to the region.

Authentic Architecture & Inspiring Public Places

Northern Virginia contains a dynamic mix of upscale, mixed-use districts and historic downtowns that provide visitors with a range of experiences. The region blends arts and culture with authentic architecture and public space for unique experiences unlike any other region in the state.

Hotels & Hospitality

Due to the region's geographic diversity, needs in hotel and hospitality vary by city and county. While the region is home to multiple luxury properties and newly delivered boutique properties in Alexandria and Loudoun County, the region still faces lodging gaps involving boutique accommodations in rural areas and insufficient full-service, group-oriented hotels in its urban centers. Arlington's newly opened Hilton property helps to fill a gap in the market, but other cities in Northern Virginia recognize the need for additional supply of full-service hotels accompanied by a convention center to fulfill the currently lost business.



Northern Virginia

COMPETITORS

Kentucky, Pennsylvania, North Carolina, Tennessee, and West Virginia were identified as Virginia’s core competitive set. Within these states Northern Virginia’s most relevant competitors by region include:

Pennsylvania: Philadelphia and the Countryside

The Greater Philadelphia region is one of the most direct competitors to Northern Virginia because of the overlapping assets focused on American history tourism, upscale dining and shopping amenities, and domestic and international accessibility. Like Northern Virginia, Philadelphia is rich with globally recognized icons such as Independence Hall, the Liberty Bell, and Old City, which parallel Northern Virginia’s Mount Vernon, Manassas Battlefield, and Alexandria’s Old Town. Both regions also balance these historical anchors with modern urban vibrancy including Arlington, Tysons, and the Mosaic District in Northern Virginia, and Center City and the Delaware River Waterfront in Philadelphia.

Philadelphia also extends its competitive profile with nearby countryside escapes such as Bucks County’s wineries, Chester County’s historic estates, and the Main Line suburbs, which share similarities with Loudoun and Fauquier’s wine country and agritourism appeal. Both regions share similar target audiences including heritage travelers, international visitors on Northeast Corridor itineraries, business travelers, and high-spending cultural explorers who value access to both city amenities and quick day trips.

North Carolina: Piedmont Region Raleigh, Durham, and Charlotte

The Research Triangle and Piedmont region of North Carolina compete in the innovation-and-lifestyle space with its mix of major universities, technology hubs, cultural amenities, and proximity to wine and craft beverage areas. Similar to Northern Virginia, this region within North Carolina has attracted investments from major corporations relocating headquarters office developments and has simultaneously invested in its conference and convention assets to accommodate high-spending meetings and convention audiences, focused on the technology and innovation space.

Tennessee: Middle Region

Nashville

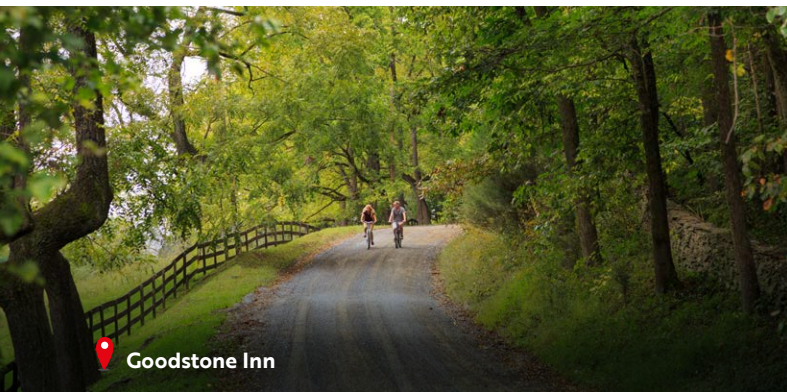
The Middle Region of Tennessee positions itself as both a booming leisure destination and a major meetings hub with its downtown convention center, growing headquarters hotel inventory, and walkable downtown entertainment district (Broadway and Bridgestone Arena). Nashville is one of the nation’s most recognized live music epicenters, branding itself as “Music City.” Furthermore, Nashville differentiates itself from Northern Virginia with major investments in sports tourism, both professionally and at the youth level, with projects such as Nissan Stadium, GEODIS Park, Bridgestone Arena, and nationally visited indoor hockey complexes and outdoor field facilities.

In terms of target audiences, Nashville and Northern Virginia overlap heavily in pursuing experience-driven leisure travelers, event attendees, and high-spending business visitors. Nashville captures younger tourists drawn to live music, nightlife, and culinary culture, while also appealing to affluent couples and groups interested in premium suburban escapes and cultural touring. This audience mix is similar to Northern Virginia’s wine country, historic attractions, and modern entertainment districts.

Kentucky: Louisville Area Bourbon, Horses & History

The Louisville Area in Kentucky draws a similar mix of leisure and business visitors through its signature experiences coupled with an emerging meetings and events market, much like Northern Virginia blends historic assets with urban dining and entertainment. Louisville recently expanded the Kentucky International Convention Center and continues to build its supporting hospitality amenities.

The Louisville area has differentiated itself as a nationally unique tourism destination by declaring itself as “Bourbon City,” while actively reinforcing this tagline through investments supported by Kentucky Tourism. Louisville’s Urban Bourbon Trail attracts national and international visitation from affluent, experience-driven travelers seeking curated distillery experiences, high-end boutique hotels, and an emerging dining scene. The region is also home to Churchill Downs, one of the nation’s most famous annual horse races. Horse racing is another defining aspect of Louisville’s identity, attracting affluent tourists seeking unique sports tourism experiences. The western part of NOVA is recognized as “Horse Country,” which is an element that could be embraced in the future for the region, similar to how Louisville has leveraged its success.



Goodstone Inn



COMPETITOR SUMMARY

Northern Virginia competes with a set of highly visible, experience-driven destinations that successfully pair iconic cultural assets with modern urban districts, signature branding, and convention-ready infrastructure, including Greater Philadelphia and its Countryside, North Carolina’s Piedmont region, Tennessee’s Middle Region anchored by Nashville, and the Louisville area in Kentucky. These competitors reinforce the importance of leveraging nationally recognized anchors while investing in walkable entertainment districts, conference and convention capacity, and clearly defined thematic branding. Philadelphia demonstrates how historic assets can be activated through adjacent urban neighborhoods and countryside escapes, while Nashville and the North Carolina Piedmont highlight the role of clustered entertainment, live music, and innovation-driven meetings infrastructure in driving year-round demand. Louisville illustrates the power of a unifying experiential brand, such as the Urban Bourbon Trail, supported by targeted investment and storytelling.

Collectively, these competitors suggest that Northern Virginia’s opportunity lies in more intentionally packaging its history, dining, arts, wine country, and equestrian assets; strengthening its identity as a gateway to the nation’s capital; and advancing convention and group-ready development to compete for high-spending leisure and business travelers.



Bluemont Vineyard

Northern Virginia

TACTICAL RECOMMENDATIONS

Based on the Pillars of Place analysis and stakeholder feedback, Hunden recommends an emphasis on the following Pillars of Place for the enhancement of tourism in Northern Virginia:

Conventions & Conferences | Hotels & Hospitality

- Exhibit Space: 80,000 – 100,000 square feet
- Ballroom Space: 20,000 – 30,000 square feet
- Meeting Space: 12,000 – 15,000 square feet
- Attached full-service hotel with at least 500 rooms, accompanied by an additional 40,000 – 50,000 square feet of ballroom and meeting space
- A feasibility study should be conducted to determine the recommended size and scale of a convention center and attached full-service hotel

As of September 2025, there are plans to transition the Dulles Expo Center into an IKEA, further affecting the region's conference and convention assets. Neither property offers the exhibit or ballroom space, or the attached hospitality assets required for hosting major conventions or conferences that have historically inquired about space within the region.

An asset of this scale will allow Northern Virginia to compete with Philadelphia, Raleigh-Durham, Nashville, and Louisville for convention and conference business, an area where all competitors have made recent investments.

Sports

- Indoor Multipurpose Sports Complex: Minimum of eight hardwood basketball courts, convertible into 16 volleyball courts. The facility's flat floor would cover roughly 100,000 – 130,000 square feet of usable function space for sporting events such as wrestling, cheer and dance, pickleball, and other, non-sporting events.
- Outdoor Sports Complex: Minimum of 12 turf multipurpose fields and/or 12 turf multipurpose baseball/softball diamonds
- A feasibility study should be conducted to determine the optimal size of an indoor complex for the Northern Virginia region. Similarly, a feasibility study should be conducted to determine the elements of an outdoor complex that would provide the highest volume of sports tourism for the region and state.

Northern Virginia could benefit from development of both indoor and outdoor youth sports venues with the required number of surfaces in one location for regional and national events. Regional sporting events are currently being hosted within the region, but require multiple facilities across counties, leading to operational inefficiencies and negative visitor experiences. The St. James in Springfield is a nationally recognized youth sports facility but is a privately operated facility primarily utilized by members of the facility. Accessibility to utilize the venue restricts the ability to bid for impactful youth sports events within the region.

These assets will help Northern Virginia compete with the identified competitive regions for indoor and outdoor youth sports tourism events throughout the calendar year.

Hotels & Hospitality

As previously mentioned in the Conference & Convention tactical recommendation, there is an opportunity in the region for a full-service hotel with at least 500 rooms, accompanied by an additional 40,000 – 50,000 square feet of ballroom and meeting space.

Boutique hotel product development in Stafford, Spotsylvania, Caroline, Culpeper, Rappahannock, and Fauquier could complement the region's historic downtowns, agrotourism, and recreational asset offerings. Relative to other parts of the region, these counties contain primarily limited-service hotel properties and short-term rentals, which do not offer visitors a unique, compelling hospitality option within the region.

To attract boutique hotels with amenities, VTC and regional partners should raise awareness with development partners for authentic opportunities that fit the regional brand.

Entertainment

- Small and midsized multipurpose entertainment venues located within the region's dense, urban cores could attract national and regional touring with live, ticketed entertainment acts. Multipurpose assets would be available for private rentals and group events to support convention and conference assets

Northern Virginia's entertainment supply is currently highlighted by Jiffy Lube Live and Wolf Trap National Park for the Performing Arts, both large-scale outdoor venues. While both venues score as high-performing assets within the region, an indoor, multipurpose entertainment venue will allow the region to attract a higher frequency of national and regional touring acts.

CONCLUSION

The Tactical Recommendations within Sports, Hotels & Hospitality, and Entertainment are primarily catered to the existing Target Audiences within Northern Virginia; however, development within Sports allows for the opportunity to attract a more diverse base of families, exposing additional visitors to the region's current lures.

Northern Virginia has evolved into one of the most advanced and diversified technology and corporate business hubs in the United States. Anchored by its proximity to Washington, D.C., and supported by two major airports, the region has become a hub for innovation, data management, and professional services. Development of Conference & Convention assets is needed to support the growing demand for business travel, conventions, and conferences. Major Conference & Convention assets also provide the infrastructure to host a wide variety of events with different subject matters, serving as a magnet for new target audiences for the region.

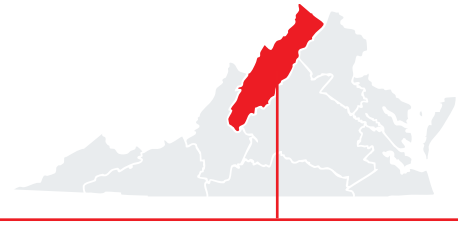
Northern Virginia's is well positioned with a diverse set of tourism assets, making it the most impactful tourism region in the state, per VTC's 2024 economic impact report. Despite its supply of nationally attractive assets, the region has gaps in several Pillars of Place that would, if developed, enhance and further diversify its tourism offerings and increase competitiveness of the region compared to the identified regions in other states. Development of assets in Convention and Conference, Sports, and Hotels and Hospitality would also support assets currently classified as regional assets with a higher volume of annual tourism activity, in line with VTC's hub-and-spoke methodology.

Shenandoah Valley

STATE OF THE REGION

The Shenandoah Valley region is comprised of eight counties including Augusta, Clarke, Frederick, Page, Rockbridge, Rockingham, Shenandoah, and Warren, and the cities of Harrisonburg, Lexington, Buena Vista, Staunton, Winchester, and Waynesboro. The Shenandoah Valley region, home to approximately 525,000 residents, is one of Virginia's most recognizable and picturesque regions. Anchored by Shenandoah National Park, the Blue Ridge Parkway, Skyline Drive, and the Appalachian Trail, the region offers a strong concentration of outdoor experiences that attract nature enthusiasts, agritourists, and families. Shenandoah Valley also features historic downtowns, Civil War battlefields, Revolutionary War history, and educational and cultural institutions such as museums, performing arts venues, and universities. Compared to its neighboring regions, Shenandoah Valley is positioned less as an urban commercial hub and more as a destination for leisure, recreation, and agritourism.

Shenandoah Valley is primarily a drive-in destination, which contributes to the region's tourism draw as a popular scenic road trip destination. The region is supported by Interstate 81 (I-81) running north and south through the region. I-81 bisects with Interstate-64 (I-64), connecting the region to West Virginia to the west and Central Virginia to the east. State Routes 3 and 33 provide scenic route access via I-95. I-66, Route 7, Route 50, and US 211 are also considered major thoroughfares for travelers coming from Washington, D.C., and Northern Virginia.



\$1.6B	Total Direct Spending
14.98K	Total Employment Jobs
\$472.1M	Total Labor Income
\$48.8M	Total State Taxes
\$76.7M	Total Local Taxes

Based on the 2024 economic impact numbers prepared by VTC, the Shenandoah Valley Region achieved approximately 5 percent of the state's total tourism impact. The following metrics provide further economic impact highlights:

Based on Hunden's Pillars of Place assessment and feedback accumulated from extensive stakeholder engagement, which included regional focus groups, industry-represented steering committee, individual interviews, and a region-specific survey, a SWOT analysis was prepared for the region.

STRENGTHS

The Shenandoah Valley's strongest assets are defined by the region's identity as a nationally recognized recreational and environmental destination. Beyond assets within the built environment, the region attracts high volumes of visitation in the fall months for its natural beauty, events and festivals, and historic offerings. Assets within these categories scored as the strongest POIs across the region and have significant overlap with many of VTC's identified lures for the region, including Outdoor, History, Park, Landscape, Caverns, Agritourism, Towns, and Winery/Brewery.

Recreation & Natural Environment

The Shenandoah Valley is most widely known for its recreational tourism offerings, highlighted by the Shenandoah National Park. POIs within this category scored the highest within the region, including entrances to the national park, Luray Caverns, Natural Bridge State Park, and Skyline Drive. While this Pillar contains the region's highest scoring POIs and has the highest count of POIs, there are opportunities for additional offerings including enhanced access to the Shenandoah River and further development of mountain biking trails.

Arts & Culture

The region is a hub for arts and culture, anchored by its universities, which contribute performing arts, museums, and academic-driven cultural programming. Universities like James Madison University also generate sports tourism through athletic programs and entertainment tourism with productions at the Forbes Center for the Performing Arts. Historic cities such as Staunton, Winchester, Waynesboro, and Lexington showcase preserved architecture, Civil War heritage, and nationally recognized institutions such as the American Shakespeare Center and the Virginia Military Institute Museum. Winchester's role as a historic gateway to the Shenandoah Valley positions it as a key cultural anchor within the northern portion of the region, while Waynesboro benefits from its proximity to Shenandoah National Park and the Blue Ridge Parkway, blending outdoor access with a growing downtown arts and dining scene.

Authentic Architecture & Inspiring Public Places

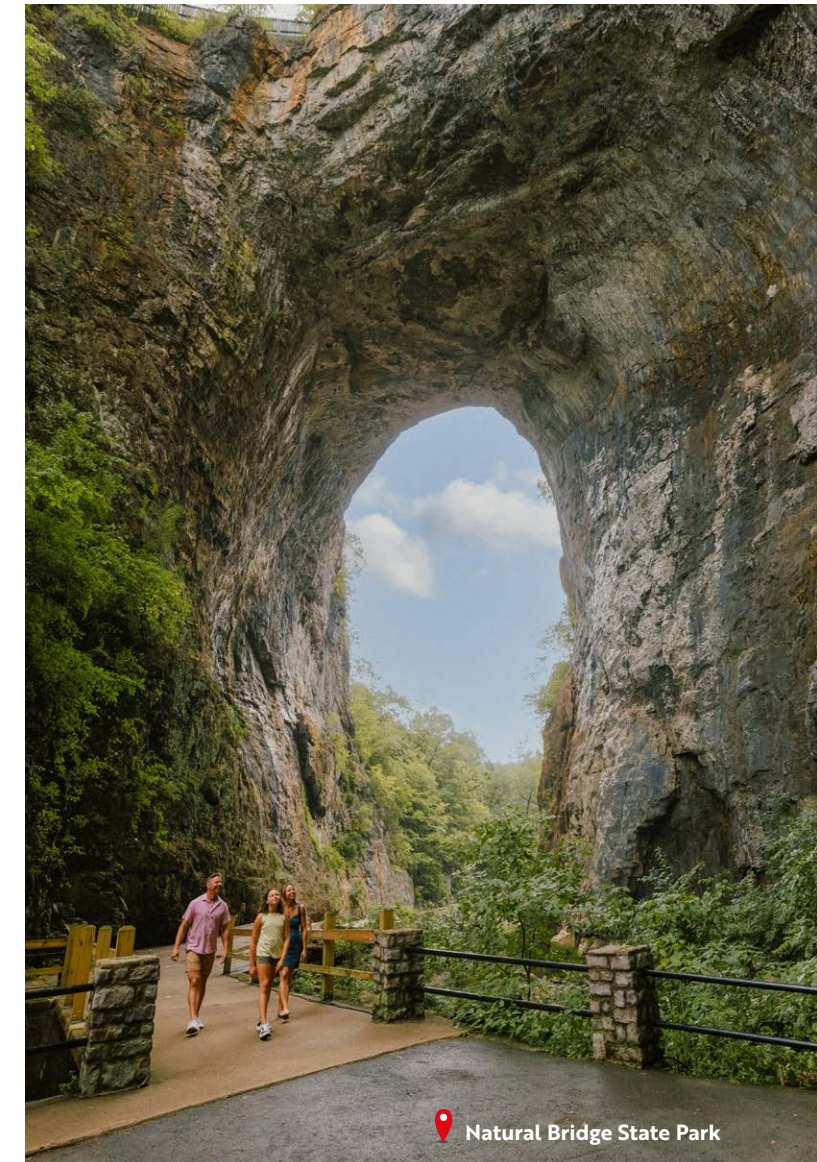
The Shenandoah Valley is distinguished by its historic downtown districts, which define the character of its many small towns and cities. These walkable districts combine historic preservation with modern amenities like locally-owned restaurants, shopping, and cultural venues. The downtown districts across the region also tend to host a variety of events and festivals throughout the year with themes specialized to each locality.

WEAKNESSES

Seasonality and accessibility are two weaknesses for the region. As a region centered around recreation, outdoor tourism, and agritourism, the winter months are slower periods for the Shenandoah Valley. Accessibility by air serves as a barrier for attracting visitation outside the regional drive-in market beyond the current target market of visitors seeking a combination of recreational tourism and historical tourism. The vast size of the region and distance between major tourism assets within the region can be viewed as a benefit for encouraging visitors to extend their stay, but this also serves as a weakness for ease of access to the region's top attractions.



Great Valley Farm Brewery and Winery



Natural Bridge State Park

Shenandoah Valley

OPPORTUNITIES

The Shenandoah Valley has an established brand and identity that can be amplified through strategic investments in a number of areas including Conference and Convention assets to attract group business to the market, high-end lodging options to extend visitation of affluent visitors seeking recreational tourism, promotion of a diverse adult beverage ecosystem, and a niche sporting and event market.

Conventions & Conferences

The Shenandoah Valley has some meeting and conference space, however it has yet to develop assets of scale in the Conferences and Conventions Pillar. The Blackburn Inn and Conference Center is in the midst of an expansion to increase inventory from 50 to 96 total on-site hotel rooms but still needs adequate venues for attracting group business to the region. Stakeholder feedback and Symphony data reinforce the strong demand from Washington, D.C., Maryland, and Pennsylvania, to host conventions and conferences in the region, but current leads must align with the available supply.

Hotels & Hospitality

Due to the region's geographic diversity, needs in hotel and hospitality vary by city and county. Overall, there are opportunities for boutique hotel developments in various parts of the region. Hotels such as the Hotel 24 South, George Washington Hotel, and Hotel Madison are examples of compelling offerings within the region, but opportunities exist within the region for upscale, lifestyle offerings that cater to affluent, recreational travelers. From a resort standpoint, Massanutten Resort ranks as one of the highest scoring POIs within the region due to the diversity of on-site amenities and seasonal offerings. With amenities for visitors throughout the year and for all age groups, the resort is a potential location for additional Convention and Conference assets.

Shopping, Dining, Eaterertainment & Adult Beverage

The region is rich with wineries, breweries, and an emerging culinary scene. The majority of the region's wineries are family-owned and -operated, providing visitors with authentic and intimate experiences. A challenge that wineries face within the region is accessibility and connectivity between properties, resulting in challenging commutes for visitors between venues. There are opportunities for eaterertainment

concepts that combine dining with family entertainment options within the region to increase visitor spending and complement the recreational tourism draws.

The region's wineries require additional exposure within restaurants in Virginia. Most wineries within the region do not have the resources to market and distribute products throughout the state or into other surrounding states; despite the fact that many are award-winning wineries. Marketing and distribution opportunities exist with the Virginia Wine Distribution Company and Virginia Beer Distribution Company, but further collaboration within Shenandoah Valley's wineries and local restaurants is needed to help with brand notoriety across the state. For example, Bluestone Vineyards shared information on prior partnerships with restaurants in Harrisonburg that offered their products on their menus. These offerings helped the brand gain traction with residents and visitors to the city, and it led to increased visitation to the winery for tastings and the opportunity to buy bottled products.

Recreation & Natural Environment | Sports | Events

As established throughout the regional summary, the Shenandoah Valley is known on a national level for its Recreation & Natural Environment POIs, which serve as a primary driver of visitation. To sustain and grow this advantage, the region has an opportunity to strategically reinvest in and diversify these assets through enhanced trail connectivity, expanded river access and the development of signature sports- and event-based experiences that complement the Valley's outdoor identity. By strengthening its ability to host niche sporting events and outdoor-focused festivals, the region can increase visitation during shoulder seasons, extend length of stay, and generate greater economic impact while reinforcing its position as a premier outdoor destination.

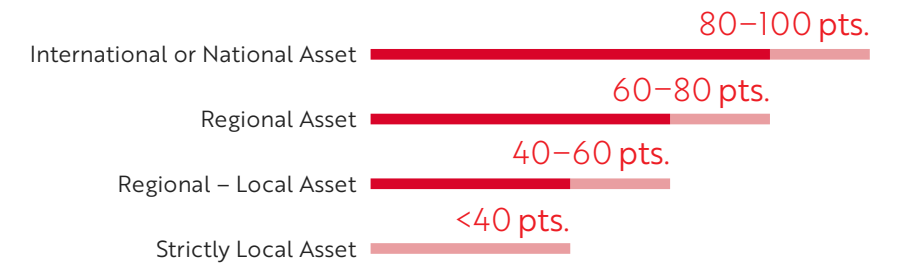
THREATS

Enhancing recreational and natural assets has a higher barrier to entry compared to other Pillars of Place due to the inability to recreate landscapes; therefore, the Shenandoah Valley must continue to focus on diversifying the offerings within this Pillar to further the regional destination appeal and economic benefits. Competitive markets found within North Carolina and Tennessee have emerged as destinations for recreational tourism with the ability to cater to the demands of visitors of various economic backgrounds. To compete in the future, investments must be made to diversify the recreational offerings within the region and to elevate the quality of lodging, meetings and event infrastructure, arts and culture, and entertainment.

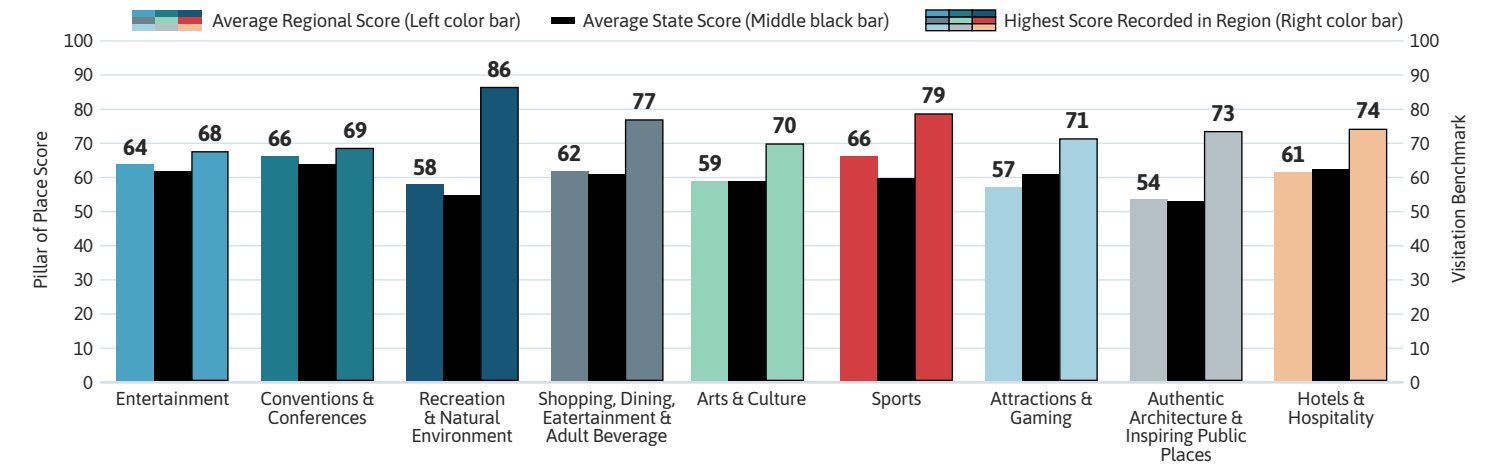
PILLARS OF PLACE – REGIONAL ASSET PERFORMANCE

VTC worked with stakeholders across the state in each region to identify relevant POIs for the tourism experience. Hunden scored and ranked the regional POIs as provided by VTC to analyze the regional performance of assets versus the average performance of assets across the state.

Assets were scored on a scale between 0 and 100 by a total of 20 different metrics. The scoring of assets was categorized in the following tiers shown on the right, while the regional pillar scores are shown in the table below:

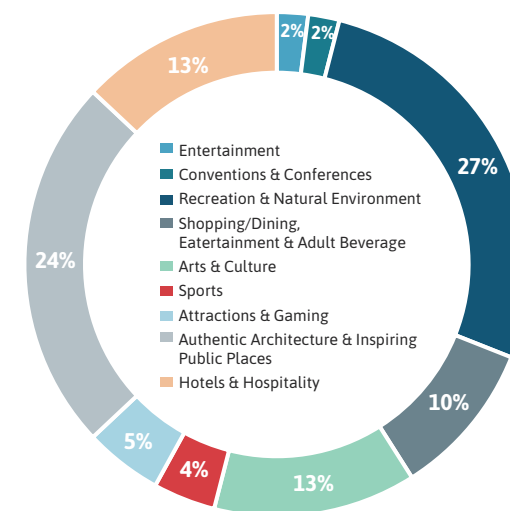


Pillars of Place Assessment | Shenandoah Valley



The following graphic details the number of POIs within each Pillar of Place within the region.

Pillars of Place Assessment | Total POIs by Pillar



The Pillars of Place analysis, the number of POIs within each Pillar, stakeholder feedback, and the region's current and future target audience were considered when identifying tactical recommendations for each region. Assets were individually assessed based on offerings and current effectiveness in attracting national and regional visitation to identify gaps within each pillar.

Within Shenandoah Valley, this analysis highlighted the total assets and current scoring in the Conventions & Conferences, Hotels & Hospitality, Shopping, Dining, Eaterertainment & Adult Beverage Experiences. Hunden identified tactical recommendations for specific pillars to raise the regional Pillar score with assets capable of attracting national visitation.

Shenandoah Valley

TARGET AUDIENCE PROFILES

The target audience analysis for the Shenandoah Valley was developed using a sample of the region's top-performing assets across the Pillars to understand the current visitor types and identify audiences most aligned with the region's offerings to leverage for future growth. The audience profiles were analyzed through Placer.ai access to Experian customer data based on current visitation. The three dominant visitor segments currently within Shenandoah Valley include Booming with Confidence, Power Elite, and Autumn Years. These three segments account for the highest percentage of visitation to the top POIs aligned with the regional lures. The distribution represents Shenandoah Valley's diverse demographic background of visitors seeking recreational, historic, and natural environmental experiences within the region.

C

Booming with Confidence

The Booming with Confidence audience consists of prosperous, established couples and families that value comfort, quality, and shared experiences. Their stability and affluence make them strong consumers or an ideal target for family-friendly lodging, agritourism, and outdoor recreation that blends relaxation with culture and nature.

A

Power Elite

The Power Elite group represents the most affluent households with average incomes exceeding \$250,000 and defined by influence, education, and refined living. These accomplished professionals are visitors who value refined yet authentic experiences, suggesting opportunities to expand premium offerings, such as curated culinary events, private heritage tours, and elevated lodging and wellness experiences.

J

Autumn Years

Mature, long-settled couples who lead peaceful, community-oriented lives in older single-family homes. Rooted in tradition and financial stability, they prefer quiet routines centered on hobbies, reading, and outdoor pastimes. Loyal to familiar brands and conservative in their lifestyle choices, they place high value on stability and strong local ties.

Source: Placer.ai Experian Mosaic Segments

Recalling the regional lures (Outdoor, History, Park, Landscape, Caverns, Agritourism, Towns, and Winery/Brewery), these target audiences, primarily consisting of active young adults, affluent established families with children, and mature adults, align with the region's current top POIs that emphasize recreational tourism, agritourism, historical experiences, arts and culture, education, and historic downtowns.

Primary in-state feeder markets for the Shenandoah Valley include Northern Virginia, the greater Richmond region, and Hampton Roads, which generate consistent visitation from affluent professionals, families, and mature households seeking scenic, culturally rich, and easily accessible getaway destinations.

Adjacent out-of-state feeder markets include the Washington, D.C. metro area and suburban Maryland counties such as Montgomery, Howard, and Frederick, as well as south-central and southeastern Pennsylvania communities including Lancaster, York, Harrisburg, and Chester County, all of which share high concentrations of educated, higher-income households with strong interest in outdoor recreation, historic downtowns, and experiential travel.

Additional secondary feeder markets within a comfortable drive range include Charlotte and the North Carolina Piedmont, the Eastern Panhandle of West Virginia, and portions of central North Carolina, where established professionals and near-retirement households align closely with the Shenandoah Valley's blend of scenic landscapes, cultural assets, agritourism, and authentic small-town experiences.

The following regional priorities highlight the opportunities to enhance offerings catered toward the current regional target audience and attract new target audience groups. Product recommendations were outlined to better position Shenandoah Valley against its regional competitors within Virginia's top competitive statewide markets.



REGIONAL PRIORITIES

Regional priorities for product development and Pillar of Place enhancement were formulated based on regional scoring metrics and stakeholder feedback from in-person workshops, Steering Committee meetings, and virtual Focus Group workshops.

Entertainment

Overall, the region has assets for live, ticketed performances including, the Forbes Center for the Performing Arts, the Rebecca J. Graves Regional Performing Arts Center of Luray, and Court Square Theater. But due to complex talent routing networks, visitation to these venues tends to skew toward the local visitor profile. A purpose-built entertainment venue would require additional due diligence to determine optimal location and sizing within the region to maximize economic impact and attract long-distance visitation without competing with the existing facility supply.

Conventions & Conferences

The Shenandoah Valley is currently underserved in the Conferences and Conventions Pillar. While the Blackburn Inn and Conference Center is in the midst of an expansion to increase inventory from 50 to 96 total on-site hotel rooms, additional capacity for rooms and venue space for attracting group business to the region will remain. The Hotel Madison and Shenandoah Valley Conference Center are also notable assets within the region. Stakeholder feedback and Symphony data reinforce the strong demand from Washington, D.C., Maryland, and Pennsylvania, to host conventions and conferences in the region, but current leads must accommodate the available supply.

Recreation & Natural Environment

The Shenandoah Valley is most widely known for its recreational tourism offerings, highlighted by the Shenandoah National Park. POIs within this category scored the highest within the region, including entrances to the national park, Luray Caverns, Natural Land Bridge State Park, and Skyline Drive. While this Pillar contains the region's highest scoring POIs and has the highest count of POIs, there are opportunities for additional offerings including enhanced access to the Shenandoah River and further development of mountain biking trails.

Shopping, Dining, Entertainment & Adult Beverage

The region is rich with wineries, breweries, and an emerging culinary scene. The majority of the region's wineries are family-owned and -operated, providing visitors with authentic and intimate experiences. A challenge that wineries face within the region is accessibility and connectivity between properties, resulting in challenging commutes for visitors between venues. There are opportunities for eatertainment concepts within the region to increase visitor spending and complement the recreational tourism draws.



Shenandoah Valley

REGIONAL PRIORITIES (CONT.)

Arts & Culture

The region is a hub for arts and culture, anchored by its universities, which contribute performing arts, museums, and academic-driven cultural programming. Universities like James Madison also generate sports tourism through athletic programs and entertainment tourism with productions at the Forbes Center for the Performing Arts. Historic towns like Staunton and Lexington showcase preserved architecture, Civil War heritage, and nationally recognized institutions such as the American Shakespeare Center and the Virginia Military Institute Museum.

Sports

The Virginia Horse Center ranked as one of the region's highest scoring POIs, attracting high volumes of visitation from across the region for niche programming. While the region attracts a high volume of recreational tourism, accessibility concerns and lodging constraints affect opportunities for major sports developments. Opportunities for the development of traditional sports assets reflect cost concerns, though opportunities exist in the region for sporting activities such as mountain biking and water sports, as mentioned in the Recreation & Natural Environment Pillar.

Attractions & Gaming

The Virginia Safari Park is a unique asset within the region, offering visitors the opportunity to engage with non-native animals. The 180-acre park features a variety of experiences and educational opportunities that cannot be found elsewhere in the state. Beyond the park, the tourism identity of the region, as represented in the Attractions and Gaming Pillar, is catered more to the natural and cultural assets rather than large-scale theme parks.

Authentic Architecture & Inspiring Public Places

The Shenandoah Valley is distinguished by its historic downtown districts, which define the character of its many small towns and cities. These walkable districts combine historic preservation with modern amenities like locally-owned restaurants, shopping, and cultural venues. The downtown districts across the region also tend to host a variety of events and festivals throughout the year with themes specialized to each locality.

Hotels & Hospitality

Due to the region's geographic diversity, needs in hotel and hospitality vary by city and county. Overall, there are opportunities for boutique hotel developments in various parts of the region. Hotels such as the Hotel 24 South, George Washington Hotel, and Hotel Madison are examples of compelling offerings within the region, but opportunities exist within the region for upscale, lifestyle offerings that cater to affluent, recreational travelers. The Massanutten Resort ranks as one of the highest scoring POIs within the region due to the diversity of on-site amenities and seasonal offerings. With amenities for visitors throughout the year and for all age groups, the resort is a potential location for additional Convention and Conference assets.

COMPETITORS

Kentucky, Pennsylvania, North Carolina, Tennessee, and West Virginia were identified as Virginia's core competitive set. Within these states Shenandoah Valley's most relevant competitors by region include:

Pennsylvania

Lehigh Valley

The Lehigh Valley offers competitive assets including historic downtowns, universities, and arts and culture assets. Like Winchester, Harrisonburg, and Staunton, Lehigh Valley cities blend preserved architecture with vibrant arts, dining, and shopping scenes. For travelers seeking authentic mid-sized towns with history and culture layered into modern experiences, Lehigh Valley and Shenandoah Valley often target the same demographic segments, including active, older travelers, young families, and urban residents seeking recreational and natural tourism.

North Carolina

Asheville/Blue Ridge Mountains & Boone

As an aspirational competitive destination, Asheville is one of the most relevant competitors to the Shenandoah Valley. Asheville has many similar assets found within the Shenandoah Valley's historic downtowns, but features multiple boutique hotels, including Hilton Tapestry and Curio Collection properties, the Omni Grove Park Inn & Spa, an emerging arts scene, recreational assets, interstate access, and a regional airport.

As a current competitive destination, Boone, North Carolina, is centered on outdoor recreation and scenic mountain landscapes, including access to the Blue Ridge Parkway, Appalachian Trail, Pisgah National Forest, and nearby ski areas such as Appalachian Ski Mountain and Beech Mountain. Boone attracts visitors seeking hiking, cycling, winter sports, and fall foliage, positioning it as a four-season destination for outdoor-oriented travelers. Unlike larger destinations such as Asheville, Boone maintains a low-density small-town feel with an emphasis on authenticity, nature, and community-driven experiences versus large-scale attractions.

Anchored by Appalachian State University, Boone's tourism and cultural identity is heavily influenced by its college-town character, which supports performing arts, sporting events, and seasonal festivals. The presence of the university provides a steady flow of visitors tied to academic, athletic, and cultural programming, similar to the role that institutions like James Madison University play within the Shenandoah Valley.

Tennessee

Great Smoky Mountains Region & Chattanooga

The Great Smoky Mountains region, including Gatlinburg, Sevierville, and Pigeon Forge, competes with Shenandoah in its topography, outdoor recreation, and family travel appeal. While the Smoky Mountains was routinely mentioned as a regional competitor to Shenandoah Valley by stakeholders, the Smoky Mountains' features of major attractions and theme parks contrast with Shenandoah Valley's more natural identity.

Similar to Asheville, Chattanooga has emerged as an attractive smaller-market destination for a blend of accessible recreational tourism complemented by a walkable downtown with elevated shopping and dining opportunities. Chattanooga distinguishes itself through a concentrated set of paid, year-round attractions that complement its natural environment. Signature experiences such as the Tennessee Aquarium, Chattanooga Zoo, and Tennessee Valley Railroad Museum provide reliable, weather-resilient activities that appeal strongly to families, multigenerational groups, and educational travelers.

COMPETITOR SUMMARY

The Shenandoah Valley competes with a range of Appalachian and mid-sized mountain destinations that blend outdoor recreation, historic downtowns, and cultural programming, including Pennsylvania's Lehigh Valley, North Carolina's Asheville/Blue Ridge Mountains and Boone, Tennessee's Great Smoky Mountains region and Chattanooga, and select destinations in Kentucky focused on equestrian and agritourism experiences. These competitors illustrate both the scale of development the Valley does not seek to replicate and the strategic opportunities it can pursue. While destinations such as the Great Smoky Mountains and Asheville benefit from a concentration of large-scale attractions, indoor family entertainment, and highly developed tourism infrastructure, the Shenandoah Valley is better positioned to compete by selectively enhancing family-friendly, weather-resilient attractions and expanding programming in communities such as Harrisonburg, Winchester, and Staunton. Chattanooga demonstrates the value of pairing natural assets with a critical mass of year-round, paid attractions that support multigenerational visitation, while Boone reinforces the strength of a university-anchored, authenticity-driven model similar to the Valley's own college towns. Kentucky's equestrian and agricultural tourism offerings further highlight opportunities for the Shenandoah Valley to elevate its horse heritage, farm-based experiences, and rural landscapes as differentiated, experience-driven products.

Collectively, these competitors reinforce the need for the Shenandoah Valley to complement its nationally recognized natural environment with targeted investments in family-oriented attractions, indoor experiences, and place-based cultural offerings that extend stays and broaden its appeal without compromising its authentic character.



Shenandoah Downs

Shenandoah Valley

TACTICAL RECOMMENDATIONS

Based on the Pillars of Place analysis and stakeholder feedback, Hunden recommends an emphasis on the following Pillars of Place for the enhancement of tourism in Shenandoah Valley:

Conventions & Conferences | Hotels & Hospitality

- Ballroom Space: 30,000 – 40,000 square feet
- Meeting Space: 15,000 – 20,000 square feet
- Attached full-service hotel with at least 250 rooms, and a variety of on-site amenities combined with accessibility to the region's diverse recreational and natural assets
- Destination resort developments require thorough feasibility analysis to recommend optimal location, sizing, and amenity offerings for operational success

There is an opportunity for additional Conference and Convention assets coupled with resort-style amenities in the northern part of Shenandoah Valley with strong accessibility to major regional markets.

Alternatively, while the Massanutten Resort is more centrally located within the region, its existing assets including golf courses, skiing facilities, and continued investment in attractions such as a mountain roller coaster and water park expansion suggest that opportunities may exist for complementary Conference and Convention assets at the property.

Hotels & Hospitality

- 80- to 120-room, branded boutique hotel, including amenities such as a full-service restaurant, rooftop cocktail bar, spa, and indoor/outdoor function space within a walkable downtown environment
- Restaurant and bar spaces should incorporate ingredients from local farms and offerings from local wineries and breweries

Boutique hotel product development ranked as the top opportunity for product development among regional stakeholders. Stakeholder feedback and Symphony data show evidence of a high frequency of day trips to the region, likely due to current, compelling lodging assets within Shenandoah Valley's attractive and historic downtowns. Competitive destinations such as Asheville, North Carolina, have attracted investment from developers to restore historic buildings into nationally recognized, branded boutique hotels, but this level of investment has yet to occur in the Shenandoah Valley. Due to the national brand identity the region has attained from its coveted recreational assets, opportunities exist for these properties throughout the Shenandoah Valley.

To attract boutique hotels with amenities, VTC and regional partners should raise awareness with development partners for authentic opportunities that fit the regional brand. Further case study development should be conducted for best practices and inspiration for a boutique, branded property.

Recreation & Natural Environment | Sports | Events

As established throughout the regional summary, the Shenandoah Valley is known on a national level for its Recreation & Natural Environment POIs; however, the most successful destinations and regions across the country and the world must continue to reinvigorate and reinvest in their most attractive offerings to continue to drive visitation. Looking beyond regions located in Virginia's most competitive states, destinations such as Bentonville, Arkansas, should be studied for best practices in niche sporting destination development.

Bentonville has branded itself as the "Mountain Biking Capital of the World" with its extensive trail system developed for riders of all experience levels. Shenandoah Valley attracts recreational tourists to the Appalachian Trail but has the opportunity for further trail development on the naturally occurring terrain for major event hosting capabilities. Mountain biking has historically been a popular activity in the region, attracting international corporate presence for manufacturing and testing, and events have gained popularity, but opportunities exist for nationally recognized events within the region.

CONCLUSION

The Shenandoah Valley occupies a distinctive position within the Commonwealth as a nationally recognized destination for outdoor recreation, scenic landscapes, historic downtowns, and agritourism rooted in Appalachian culture. While these strengths already generate strong visitation, particularly from regional drive markets, the Valley's long-term growth potential depends on complementing its natural and heritage assets with visitor-ready infrastructure that supports longer stays and higher-value travel. Strategic investment in conference and convention facilities, boutique and resort-style lodging, and enhanced recreation- and event-based experiences will allow the region to better capture group business, shoulder-season demand, and multigenerational travel.

By strengthening its hospitality base, expanding trail and sports-related offerings, and reinforcing the role of its historic downtowns as overnight hubs, the Shenandoah Valley can evolve from a predominantly day-trip destination into a more cohesive, multi-day region while preserving the authentic character that defines its appeal.

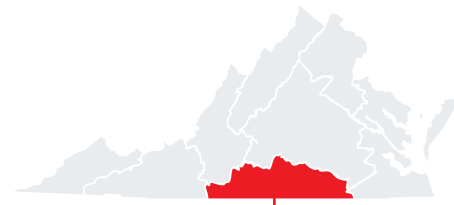
Southern Virginia

STATE OF THE REGION

The Southern Virginia Region, encompassing the counties of Brunswick, Charlotte, Greensville, Halifax, Henry, Lunenburg, Mecklenburg, and Pittsylvania, along with the cities of Danville, Emporia, and Martinsville, is defined by its rolling landscapes, vibrant small towns, and deep connections to heritage, motorsports, and outdoor recreation. Once anchored by manufacturing and tobacco industries, the region has diversified to view tourism as a catalyst for economic revitalization, blending its natural assets, lakes, and trails with growing arts, culture, and culinary experiences. Based on the 2024 economic impact numbers prepared by VTC, the Southern Virginia Region generated the impacts to the right, which allotted for 1.8 percent of Virginia’s total spending. This spending dynamic continues to change significantly with the influence of the opening of Caesars Virginia.

Southern Virginia offers visitors a balance of scenic tranquility and active adventure. The region’s hallmark attractions include Buggs Island Lake (Kerr Reservoir), the Dan River, and Smith River, which together provide some of Virginia’s most accessible and scenic freshwater recreation. Beyond the outdoors, the region’s motorsports legacy continues to thrive through the Virginia International Raceway (VIR), the Martinsville Speedway, and the South Boston Speedway, which attract year-round audiences. Downtowns in Danville, Clarksville, and South Boston are experiencing strong revitalization, fueled by boutique lodging, breweries, and community-driven events that connect visitors to the authentic character of Southern Virginia.

As tourism momentum builds, major investments such as Caesars Virginia in Danville are reshaping the visitor landscape. This new entertainment hub presents a critical opportunity to diversify experiences, encouraging visitors to explore beyond the casino to enjoy dining, shopping, and outdoor recreation



\$619.3M	Total Direct Spending
5.38K	Total Employment Jobs
\$154.9M	Total Labor Income
\$32.0M	Total State Taxes
\$24.5M	Total Local Taxes

across the region. Youth sports facilities, new hotel development, and riverfront projects further highlight Southern Virginia’s growth trajectory. However, rural and remote areas still face challenges of connectivity, lodging variety, and cohesive regional identity.

With strategic interstate access via I-85, I-95, and Rte. 58, growing partnerships with VTC, and a strong entrepreneurial ecosystem centered on adaptive reuse and placemaking, Southern Virginia is well positioned to leverage its natural beauty, heritage, and hospitality to become a premier Southern destination. The following outlines the strengths, weaknesses, opportunities and threats of the Southern region.

Based on Hunden’s Pillars of Place assessment and feedback accumulated from extensive stakeholder engagement, which included regional focus groups, industry-represented steering committee, individual interviews, and a region-specific survey, a SWOT analysis was prepared for the region.

STRENGTHS

Southern Virginia’s identity is shaped by a strong mix of natural assets, established destination anchors, and revitalizing communities that together support tourism growth. Expansive lakes and rivers such as Smith Mountain Lake, Buggs Island Lake, and the Dan River provide a foundation for outdoor and water-based recreation, while nationally recognized motorsports venues including Virginia International Raceway and Martinsville Speedway draw visitors year-round. Longstanding assets such as the Berry Hill Resort & Conference Center, alongside new significant investments like Caesars Virginia, strengthen the region’s hospitality and event infrastructure and expand its ability to serve leisure, group, and event-driven travel. Complementing these anchors, revitalized downtowns including those in Danville, South Boston, and Clarksville, along with riverfront development and placemaking initiatives, continue to enhance community character and the overall visitor experience.

Recreation & Natural Environment

Abundant lakes, rivers, and reservoirs such as Smith Mountain Lake, Buggs Island Lake, and the Dan River create a strong foundation for water-based recreation and multi-day visitation.

Attractions & Gaming

Virginia International Raceway, Martinsville Speedway, and South Boston Speedway are nationally recognized anchors that attract visitors year-round. However, the region is still working on a unified visitor experience that motivates guests to extend their stay and explore the full breadth of its towns. Projects like Caesars Virginia, new hotels, and adaptive reuse developments along the Dan River are diversifying and expanding the region’s tourism offerings.

Authentic Architecture & Inspiring Public Places

Investment in downtowns such as those in Danville, South Boston, and Clarksville has created momentum for boutique lodging, breweries, dining, and event activity. A growing emphasis on placemaking and livability enhances both resident satisfaction and visitor experience. A great example includes the riverfront development in Danville. Proximity to major interstates and neighboring markets in North Carolina positions the region to capture cross-border visitation.

WEAKNESSES

Southern Virginia faces several structural gaps that limit its ability to fully capitalize on visitor demand and extend stays across the region. The number of lodging options near lakes, motorsports venues, and outdoor recreation areas constrain overnight visitation and reduce overall visitor spending. Although the region benefits from abundant natural assets, water-based recreation experiences remain underdeveloped, with relatively few rentals, outfitters, and guided offerings. While progress is underway in places such as Danville and through initiatives like the SoVA Blueway Project, there is significant opportunity for expansion. The region’s rich heritage, though visible in its architecture and historic buildings, is not consistently integrated into the visitor experience, limiting its potential as a compelling storytelling and placemaking tool. Connectivity and accessibility challenges of signage, rail networks, and broadband access in some areas further hinder visitor navigation and destination growth. In addition, smaller destination marketing organizations and rural communities often face resource constraints in staffing and funding necessary for sustained marketing and product development. Finally, reliance on summer lake visitation and event-driven travel creates seasonal demand fluctuations, underscoring the need for more year-round attractions and experiences.



Martinsville Speedway

Southern Virginia

OPPORTUNITIES

Southern Virginia has the foundational assets and emerging demand to support significant tourism development, yet the region has not fully capitalized on opportunities to drive repeat visitation. While its natural beauty, outdoor recreation, historic towns, and expanding agritourism offerings create a compelling visitor experience, these strengths need scale and variety to consistently attract return travel. Based on current market gaps and areas of opportunity, potential investments across multiple Pillars of Place have been identified.

Recreation & Natural Environment

Southern Virginia's lakes, rivers, and trail systems represent some of its most compelling and underleveraged tourism assets. There is significant opportunity to enhance water-based recreation infrastructure at Buggs Island Lake, Philpott Lake, and Smith Mountain Lake through improved marinas, public lake access, visitor amenities, and trail connections. Additional investment along the Smith and Dan rivers can expand paddling, fishing, and riverfront experiences while strengthening connections between recreation areas and nearby downtowns. Developing regional recreation itineraries that link parks, lakes, rivers, and trail networks would encourage multi-day visitation and broaden the region's outdoor identity. Alignment with the Foothills of the Blue Ridge Outdoor Recreation Plan provides a framework to guide coordinated investment and ensure long-term sustainability.

Hotels & Hospitality

Targeted lodging development is critical to converting day visitors into overnight guests and maximizing economic impact. Opportunities exist to attract new lodging investment near key outdoor and motorsports assets, particularly in or adjacent to revitalizing downtowns. Boutique lakefront lodging, cabins, glamping, and camping experiences can better align with the region's natural setting, while adaptive reuse of historic downtown buildings for hospitality can reinforce community character. Expanding agritourism, farm-to-table concepts, boutique accommodations, and short-term rentals would further support experience-driven travel. Comparable regions with similar geographic assets are already advancing these models, and Southern Virginia is well positioned to capture this growing demand.

Shopping, Dining, Eateertainment & Adult Beverage

Southern Virginia can strengthen visitor retention and spending by expanding and clustering local dining, breweries, wineries, and entertainment offerings. Supporting food and beverage growth near downtowns, lakes, and recreation hubs would create more complete visitor experiences and encourage longer stays. Coordinated culinary itineraries and regional promotion of dining and beverage assets can further establish Southern Virginia as a distinctive destination for authentic, locally rooted experiences.

THREATS

Southern Virginia faces several interrelated threats that could constrain future tourism growth if not proactively addressed. Neighboring states such as North Carolina and Tennessee continue to make significant investments in tourism infrastructure, lodging, and destination marketing, increasing competitive pressure and drawing potential visitors away from the region. At the same time, greater coordination and deeper investment, as well as a shift from stagnated status quo can significantly reduce the risk of eroded momentum and clarify the reality that standing still ultimately leads to falling behind. Rural accessibility challenges further compound these issues, as remote communities may be left behind due to distance, insufficient transportation infrastructure, and connectivity constraints. Economic leakage is also a concern, particularly at major anchor destinations such as Caesars Virginia, where visitors may concentrate spending onsite unless surrounding communities develop complementary attractions, experiences, and services. Finally, workforce and talent constraints pose a growing challenge, as shortages in hospitality and tourism labor, especially in smaller towns, could hinder the region's ability to scale offerings, maintain service quality, and fully capitalize on increased visitation.

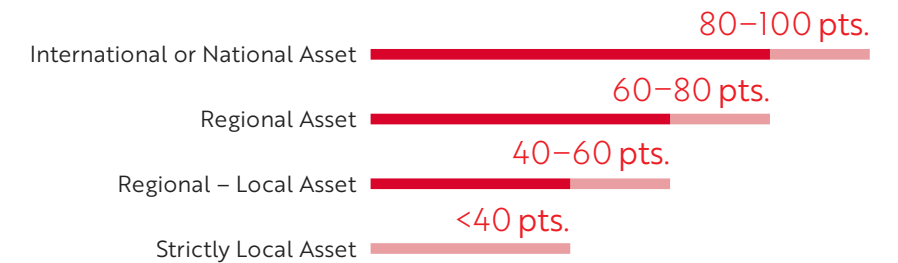
Southern Virginia's tourism foundation is strengthening through new investment, collaboration, and a growing sense of regional identity. With continued focus on water-based recreation, downtown revitalization, and visitor experience, the region can extend stays, attract new markets, and ensure that tourism remains a powerful driver of economic diversification and community pride.



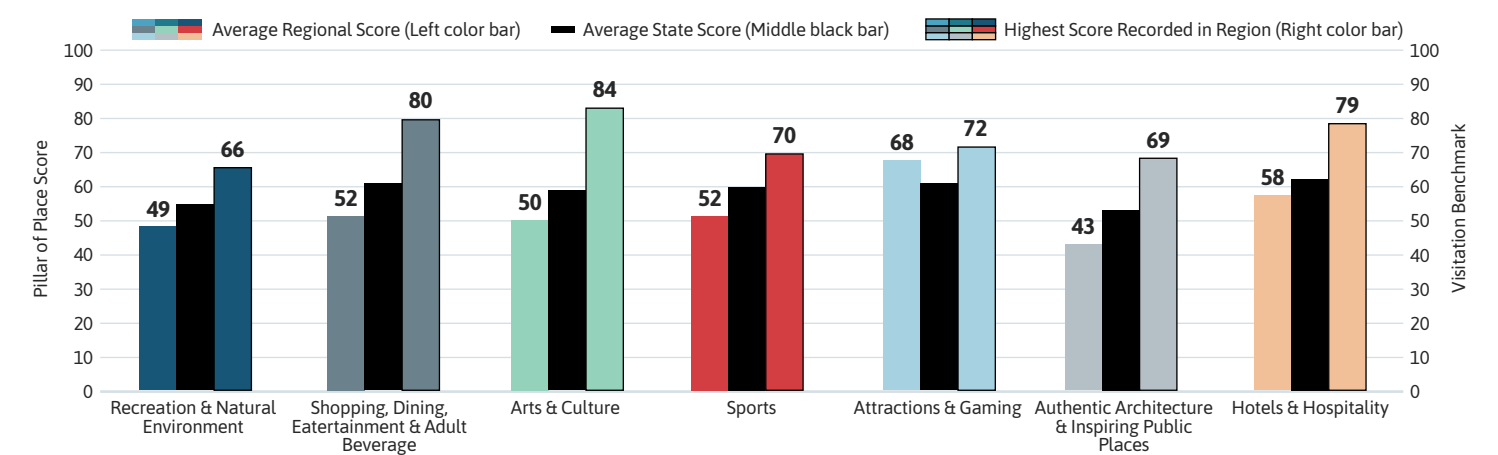
PILLARS OF PLACE – REGIONAL ASSET PERFORMANCE

VTC worked with stakeholders across the state in each region to identify relevant POIs for the tourism experience. Hunden scored and ranked the regional POIs as provided by VTC to analyze the regional performance of assets versus the average performance of assets across the state.

Assets were scored on a scale between 0 and 100 by a total of 20 different metrics. The scoring of assets was categorized in the following tiers shown on the right, while the regional pillar scores are shown in the table below:

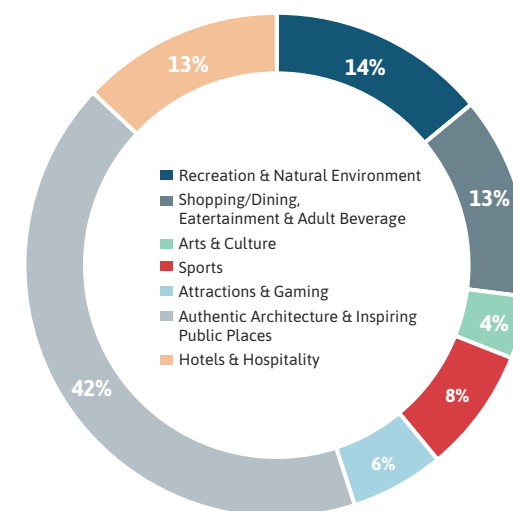


Pillars of Place Assessment | Southern Virginia



The following graphic details the number of POIs within each Pillar of Place within the region.

Pillars of Place Assessment | Total POIs by Pillar



The Pillars of Place analysis, the number of POIs within each Pillar, stakeholder feedback, and the region's current and future target audience were considered when identifying tactical recommendations for each region. Assets were individually assessed based on offerings and current effectiveness in attracting national and regional visitation to identify gaps within each Pillar.

Results revealed strong performance in Attractions & Gaming and Hotels & Hospitality, driven by the introduction of the new Caesars Virginia. Recreation & Natural Environment as well as Authentic Architecture & Public Space are significant factors in the region and based on POI scoring are areas that can be improved on. Lower scores were found in Shopping, Dining, Eateertainment & Adult Beverage experiences and Arts & Culture, highlighting potential opportunities for product development and improved visitor infrastructure.

Southern Virginia

TARGET AUDIENCE PROFILES

The target audience analysis for the Southern Region was developed using a representative sample of the region's top-performing tourism assets across outdoor recreation, heritage destinations, cultural attractions, and hospitality anchors to better understand current visitor types and identify audiences most aligned with the region's offerings for future growth. Audience profiles were analyzed using Placer.ai access to Experian customer data based on observed visitation patterns.

The audience composition across the Southern Region reflects a visitor base that is demographically distinct within the Commonwealth, characterized by mature, long-settled households; financially secure couples; and retirees seeking relaxed, authentic, and nature-oriented travel experiences. Across the region's signature destinations, including scenic byways, historic downtowns, outdoor recreation corridors, cultural sites, and resort-oriented communities, the three dominant segments are Autumn Years, Golden Year Guardians, and Booming with Confidence.

Together, these audiences demonstrate the Southern Region's strong appeal to travelers who value scenic beauty, heritage, comfort, and low-stress recreation, while also highlighting opportunities to further capture affluent, active couples seeking premium lodging, curated outdoor experiences, and elevated cultural amenities.

J

Autumn Years

Mature, long-settled couples leading peaceful, community-centered lives in older single-family homes. Rooted in tradition and financial security, they enjoy quiet routines filled with hobbies, reading, and outdoor pastimes. Loyal to familiar brands and conservative in lifestyle, they value stability and local ties.

Q

Golden Year Guardians

Nation's oldest households, composed of retirees living comfortably in long-owned homes or settled retirement communities. Financially cautious and traditional, they value security, community involvement, and familiar routines over novelty or technology.

C

Booming with Confidence

The Booming with Confidence segment includes prosperous, established couples and families in their peak earning years who seek quality, comfort, and well-curated experiences. Their affluence and lifestyle preferences position them as strong consumers of upscale lodging, elevated dining, premium outdoor recreation, and distinctive cultural offerings.

Source: Placer.ai Experian Mosaic Segments

Core in-state and adjacent feeder markets include the Richmond and Hampton Roads metros, Northern Virginia, and the Research Triangle and Piedmont Triad regions of North Carolina, where mature, affluent households seek relaxed, drivable destinations with outdoor and cultural appeal. Additional high-potential markets include Charlotte, Raleigh-Durham, Greensboro–Winston-Salem, and the Greater Washington, D.C. metropolitan area, which generate strong demand for weekend and short-stay leisure travel. Beyond adjacent states, secondary feeder markets such as Atlanta, Nashville, Knoxville, Charleston, and parts of central and eastern Tennessee fall within a comfortable drive range and contain high concentrations of retirees, financially secure couples, and active empty nesters. Collectively, these markets offer strong alignment with Southern Virginia's target audiences and represent the greatest opportunity for sustained regional visitation growth.

The following regional priorities highlight the opportunities to enhance offerings catered toward the current regional target audience and to attract new target audience groups. Product recommendations were outlined to better position Southern Virginia against its regional competitors within Virginia's top competitive statewide markets.



REGIONAL PRIORITIES

Regional priorities for product development and Pillar of Place enhancement were formulated based on regional scoring metrics and stakeholder feedback from in-person workshops, Steering Committee meetings, and virtual Focus Group workshops.

Entertainment

The Southern Region currently has a limited supply of large-scale entertainment assets; however, there is growing momentum that presents meaningful opportunities for expansion. Anchor venues such as Virginia International Speedway are actively diversifying their programming to include concerts, festivals, and special events, while Caesars Virginia in Danville has quickly emerged as a significant host of live entertainment. As these venues continue to mature, additional performance spaces such as Carrington Pavilion and other local theaters and outdoor venues should be viewed as strategic investment opportunities. Expanding and enhancing entertainment infrastructure will help elevate the region's profile, extend visitor stays, and position Southern Virginia as a more competitive and recognizable entertainment destination.

Conventions & Conferences

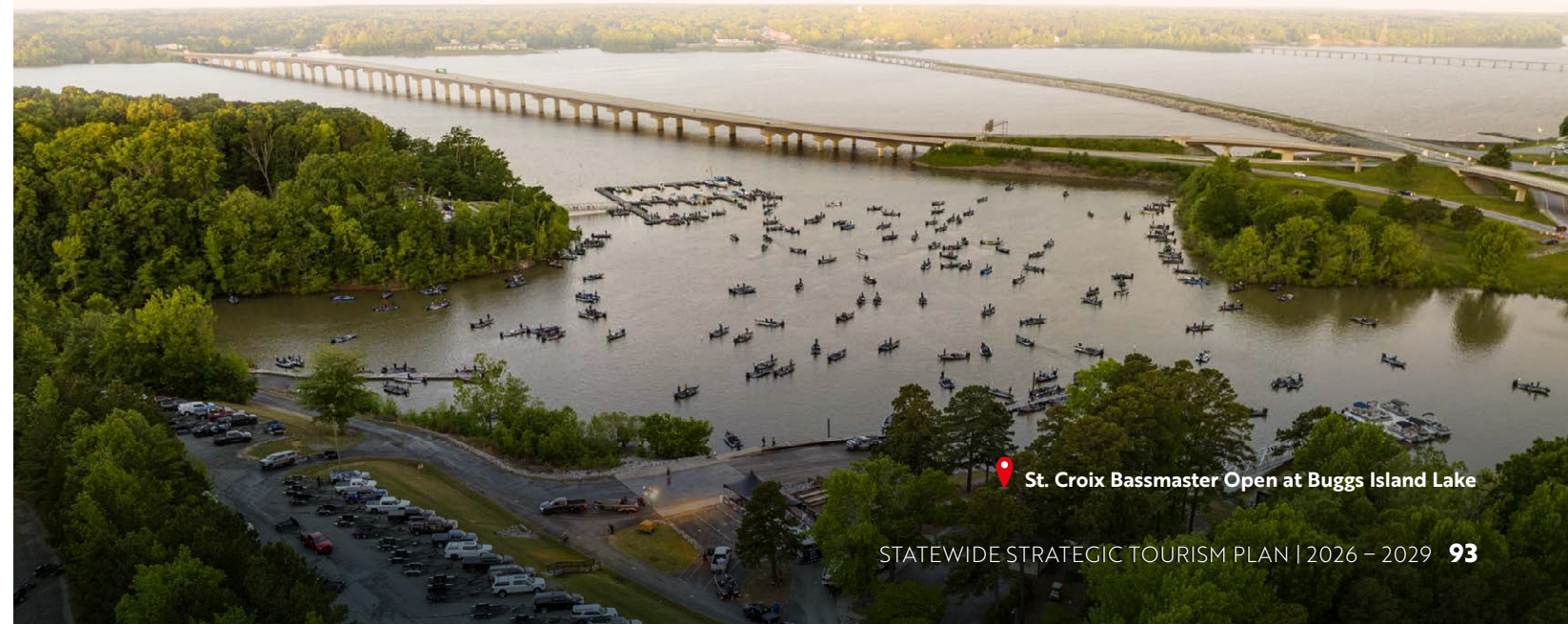
While the Southern Region does not currently feature a dedicated convention center or large-scale conference facility, it benefits from several high performing assets that drive meetings and events activity. Venues such as Berry Hill Resort & Conference Center, Caesars Virginia, and Cottontail Weddings & Events generate significant group visitation and economic impact. Caesars Virginia, in particular, has begun to attract substantial group business, creating an opportunity to further strengthen the region's meetings and events sector. A key priority should be enhancing the visitor experience for these groups in a way that encourages exploration beyond the host venue, driving spending into nearby downtowns, attractions, dining, and outdoor assets.

Recreation & Natural Environment

Southern Virginia's natural assets represent one of the region's strongest competitive advantages. Continued investment is needed to enhance water-based recreation infrastructure, including marinas, lake access points, trail connections, and visitor amenities around Buggs Island Lake, Philpott Lake, Smith Mountain Lake, and along the Smith and Dan Rivers. Developing regional outdoor recreation itineraries that connect parks, lakes, rivers, and trail systems can encourage longer stays and repeat visitation. Opportunities also exist to align planning efforts with the Foothills of the Blue Ridge Outdoor Recreation Plan, particularly in the western portion of the region, to ensure coordinated development, branding, and stewardship of natural resources.

Hotels & Hospitality

Targeted lodging investment is needed to support growth in outdoor recreation, motorsports, and event driven visitation. Priorities include attracting new hotels near key assets and within or adjacent to downtowns to reinforce walkable, experience rich visitor environments. There is also strong opportunity to encourage boutique lakefront lodging, glamping and camping concepts, and the adaptive reuse of historic downtown buildings for hospitality purposes. Expanding agritourism, farm to table experiences, and distinctive short term lodging options will further differentiate the region. Peer destinations with similar geographic and recreational assets are already advancing in this direction, and Southern Virginia is well positioned to capture growing demand for experience driven accommodations. Priority lies in advocacy for the need for lodging, as well as the review of regional and local incentive structures and information sharing between entities on how to induce development in this industry.



Southern Virginia

REGIONAL PRIORITIES (CONT.)

Shopping, Dining, Entertainment & Adult Beverage

Expanding the region's dining, brewery, winery, and specialty retail offerings is essential to improving visitor retention and overall destination appeal. Supporting food and beverage clusters near downtowns, lakes, and major attractions can help create compelling culinary itineraries and strengthen nighttime and off peak activity. There is a particular opportunity to incentivize visitors attending signature events or anchor attractions, such as Caesars Virginia, to explore nearby towns and dining districts. Developing coordinated strategies to connect these visitors with surrounding communities through marketing, transportation, and programming should be a priority to deliver a more cohesive and immersive destination experience.

Sports

The Southern Region has made intentional progress in advancing sports tourism, highlighted by the completion of the Visit SoSi Sports Tourism Strategic Plan in 2024. Hunden's broader assessment aligns closely with the findings of this plan, which identified several key priorities for continued growth. These include targeted investment in improving existing sports facility infrastructure, the formation of a regional sports tourism advisory board, greater utilization of third-party expertise, and the long-term development of an indoor sports facility to expand event hosting capabilities. Collectively, these initiatives can help the region compete more effectively for tournaments and multi-day sporting events.

Attractions & Gaming

The region outperforms many peer markets due to the presence of strong anchor attractions and gaming assets, which have significantly diversified the local economy and driven visitation. Stakeholder engagement underscored

the importance of these assets while also identifying a key challenge: visitation generated by large attractions does not always translate into meaningful economic impact for surrounding towns and businesses. A core regional priority should be developing collaborative strategies that better disperse visitor spending across communities. This may include coordinated marketing, transportation solutions, shared programming, and partnerships that connect major events and attractions with nearby downtowns, retail, dining, and cultural assets.

Arts & Culture

Southern Virginia's arts and cultural assets provide an opportunity to tell a distinctive and authentic regional story. Leveraging heritage resources, African American history, and industrial legacy sites can deepen the visitor experience and differentiate the region from competitors. Supporting regional collaboration for arts events, festivals, and cultural programming will help scale impact, increase visibility, and encourage cross community visitation while reinforcing local identity and pride. Stakeholders identified that although this takes places, continued resource and collaboration is necessary.

Authentic Architecture & Inspiring Public Places

Continued revitalization of historic downtowns remains a critical priority for the Southern Region. Investments in placemaking, pedestrian friendly design, public realm improvements, and façade enhancement programs can strengthen community character and improve the visitor experience. Enhancing wayfinding and interpretive signage will help unify individual communities under a cohesive Southern Virginia brand, making it easier for visitors to navigate the region and discover its diverse offerings.

COMPETITORS

Southern Virginia competes for visitors, investment, and regional visibility with destinations in North Carolina and Tennessee. Many of these neighboring markets benefit from more mature tourism infrastructure and longer-standing brand recognition. However, Southern Virginia's combination of affordability, scenic water assets, motorsports venues, and growing heritage tourism base provides a distinctive foundation for both visitation and long-term economic growth.

North Carolina: Kerr Reservoir region, Uwharrie National Forest, Greensboro, Burlington, Raleigh, Durham, Chapel Hill

Along its southern border, Southern Virginia competes with several high-performing tourism areas in North Carolina, including the Kerr Reservoir region, the Uwharrie National Forest area, and destinations anchored by Greensboro, Burlington, and the Research Triangle communities of Raleigh, Durham, and Chapel Hill. Lake Norman, Badin Lake, and the Yadkin Valley also serve as comparable destinations that attract visitors seeking outdoor recreation, lakefront experiences, wineries, and nearby urban amenities. These areas are supported by strong hospitality pipelines, modern lodging, and consistent public and private investment.

North Carolina's statewide tourism funding and coordinated marketing efforts have helped communities such as Winston-Salem, High Point, and Asheville capture a significant share of the regional drive market. Beyond statewide funding and marketing, these communities benefit from specific, visitor-ready products that convert drive-market demand into overnight stays. For example, Winston-Salem's downtown revitalization anchored by projects such as Kaleideum, a reimagined, interactive children's museum integrated into the downtown core, has helped activate surrounding dining, retail, and public spaces while expanding family-oriented visitation. For Southern Virginia, these destinations represent both direct competition and opportunity. Strategic investment in lakefront lodging, dining, and outdoor recreation experiences which are identified in the following tactical recommendations, paired with cross-border collaboration, could help retain visitor spending that currently flows into North Carolina markets.

Visitor-driven economic activity in North Carolina supports job creation, entrepreneurship, and downtown redevelopment in places like Lexington, Albemarle, and Salisbury. These outcomes illustrate the potential for Southern Virginia to further leverage tourism as a catalyst for small business growth and community reinvestment by expanding and strengthening its own tourism ecosystem.

Tennessee: Northeast Tennessee, Tri-Cities (Bristol, Johnson City, Kingsport), Knoxville, Pigeon Forge, Sevierville

To the west, Northeast Tennessee presents competition through a well-established mix of outdoor recreation, music heritage, and hospitality offerings. Communities such as Bristol, Johnson City, Kingsport, and Jonesborough benefit

from strong branding tied to Appalachian culture, the Birthplace of Country Music, and proximity to the Great Smoky Mountains. These destinations are supported by consistent investment in placemaking, festivals, event programming, and workforce development, allowing tourism to function as a core economic driver.

While Tennessee benefits from more developed tourism infrastructure, Southern Virginia holds competitive advantages through its extensive lake and river systems, nationally recognized motorsports venues, and lower barriers to entry for development and investment. By aligning tourism development with broader economic strategies, Southern Virginia can attract complementary industries such as outdoor recreation manufacturing, event operations, and hospitality training that strengthen regional employment and long-term growth.

Within Virginia, Southern Virginia overlaps geographically and economically with the Blue Ridge Highlands Region, particularly around Smith Mountain Lake, where lodging demand, second-home markets, and outdoor recreation audiences intersect. The Heart of Appalachia Region also competes for similar traveler segments seeking affordable, nature-based, and culturally authentic experiences, particularly in communities such as Abingdon, Wise, and Norton. These overlaps reinforce the importance of regional coordination in marketing, infrastructure investment, and brand differentiation.

By positioning itself as Virginia's destination for water recreation, motorsports, and outdoor living, Southern Virginia can complement neighboring regions rather than compete directly with them. This approach can help attract visitor spending as well as private-sector investment from resort developers, recreation outfitters, and hospitality operators.

COMPETITOR SUMMARY

While surrounding regions in North Carolina and Tennessee currently outpace Southern Virginia in tourism infrastructure and visibility, the region is well positioned to close this gap through strategic alignment of tourism development and economic priorities. Continued investment in lodging, recreation infrastructure, and downtown revitalization will allow Southern Virginia to capture greater visitor spending, support small business growth, create jobs, and reinvest in community assets. Tourism serves not only as an economic driver but also as a catalyst for improving quality of life, which is critical to retaining residents and attracting new businesses to the region.

Southern Virginia

TACTICAL RECOMMENDATIONS

Grounded in the Pillars of Place assessment and informed by stakeholder input throughout the region, Hunden recommends prioritizing specific Pillar areas that will strengthen and diversify Southern Virginia's tourism economy. These tactical recommendations reflect the region's emerging momentum in outdoor recreation, downtown revitalization, motorsports, and lake-based experiences, while also addressing infrastructure, lodging, and branding needs that limit visitor growth. Successful implementation will depend on close collaboration with VTC, localities, economic development organizations, DMOs, and private partners to advance funding strategies, support new product development, and elevate the region's overall competitiveness.

Recreation & Natural Environment

- Assess the potential for an adventure park adjacent to a public access point in a popular water-based recreational area. This would include an outdoor adventure park, kayak rentals, stand-up paddleboards, and other amenities. A great example of one that has been widely successful is the Riversport OKC in Oklahoma City.
- Align with and build on the Southern Virginia Blueway's Project (SVBP) through an implementation plan which can guide coordinated investment in lakes, trails, and river access points and strengthen the region's overall outdoor recreation economy.

Shopping, Dining, Entertainment & Adult Beverage

- Specifically, in Danville, facilitating and driving investment in mixed-use shopping and dining districts within proximity to Caesars Virginia is necessary to build on current momentum and generate significant economic impact. This should target higher-end local dining options.
- Build culinary and beverage experiences that pair local farms, wineries, and breweries with lake and downtown destinations. This should be a focus in surrounding smaller communities and can be a catalyst for follow-on hospitality investment. Without these demand drivers, hospitality investment in more rural areas is challenging.

Authentic Architecture & Inspiring Public Places

- Support continued downtown revitalization through programs and partnerships with organizations such as the Virginia Main Street program.
- Advocate for, promote, and build community support around the growing momentum in downtown development, exemplified by the success seen in places like Danville. Exposure from a state level can grow local pride, build on economic development measures, and increase small business investment.
- Expand signage and wayfinding linking major outdoor, motorsports, and cultural assets under a unified identity.
- Educationally push the importance of tourism to the hospitality economy, such as tourism ambassador programs and workforce training initiatives focused on the hospitality industry.

Entertainment

- Support and partner with the region's motorsports assets to diversify their offerings and become event and entertainment hubs that can host a wide variety of events, concerts, and festivals. Virginia International Raceway is currently in progress with this. Supporting their organization and growing exposure for events that can be held is important to the broader tourism economy.

Hotels & Hospitality

- Encourage hospitality investment through regional or state incentive programs (required program creation), strategic partnerships, coordinated marketing, and targeted land acquisition to ensure development-ready sites.
- Additional staffing dedicated to tourism and business attraction may also be needed to sustain momentum.
- Prioritize boutique and unique lodging concepts, particularly properties of 100 rooms or fewer, that reflect the character of the region and appeal to visitors seeking authentic and intimate stays that have farm-to-table or wellness offerings.
- Glamping hospitality resorts are a significant trend that the region can target and attract.

The tactical recommendations outlined above directly reflect lessons observed in competing destinations across North Carolina and Tennessee. Peer markets have demonstrated that sustained investment in outdoor recreation infrastructure, downtown placemaking, culinary clusters, and diversified entertainment programming is essential to capturing visitor spending and driving reinvestment into local communities. Southern Virginia should aim to replicate competitors' coordinated approaches to infrastructure development, branding, and public private collaboration, while differentiating itself through its affordability, extensive lake and river systems, nationally recognized motorsports assets, and emerging gaming and entertainment anchors. By intentionally connecting these assets through unified branding, visitor itineraries, and targeted hospitality investment, the region can convert competitive pressure into opportunity and position itself as a distinct, experience driven destination rather than a secondary alternative to neighboring markets.

CONCLUSION

Southern Virginia is emerging as a dynamic tourism region defined by natural beauty, heritage, and recreation. Its mix of lakes, motorsports, and revitalized small towns creates a compelling platform for growth. With coordinated investment in lodging, outdoor infrastructure, and storytelling, the region can elevate its visibility, attract new visitor markets, and solidify its position as both an authentic and aspirational destination within Virginia's tourism landscape.

The region has good momentum with recent investments. Continued advocacy to support tourism growth and impact will remain a priority. Examples may be expanded or improved hotels, additional product offerings such as festival grounds or music venues, or the rehabilitation of adjacent structures into unique businesses or outfitters.



Rooster Walk Music & Arts Festival

Southwest Virginia: Blue Ridge Highlands

STATE OF THE REGION

The Blue Ridge Highlands Region encompasses the counties of Bland, Carroll, Floyd, Giles, Montgomery, Patrick, Grayson, Pulaski, Smyth, Washington, and Wythe, along with the cities of Bristol, Galax, and Radford. The region is distinguished by its mountain landscapes, communities of artisans, and rich musical heritage.

The Southwest portions of the Blue Ridge Highlands Region sits at the gateway to Virginia's Blue Ridge Mountains, serving as both an entry point and a connective corridor between the state's most iconic mountain landscapes and its deep-rooted cultural traditions. Anchored by its role as a central segment of The Crooked Road: Virginia's Heritage Music Trail, the region is nationally recognized for its living music heritage, including bluegrass, old-time, and Appalachian folk traditions that remain integral to local identity. This cultural backbone is complemented by dramatic mountain scenery, outdoor recreation opportunities, historic communities, and artisan culture, allowing the region to offer an authentic Appalachian experience that blends music, storytelling, craft, and landscape.

Visitors are drawn to the region for its blend of outdoor adventure, creative culture, and authentic sense of place. From hiking and biking along the New River Trail State Park and the Appalachian Trail to exploring Floyd's renowned arts and music scene, or attending major events such as the Bristol Rhythm and Roots Reunion, the region delivers experiences that capture the essence of Appalachia. Downtown revitalization in communities such as Abingdon, Bristol, Galax, and Wytheville has further enhanced the visitor experience by creating active cultural hubs that connect heritage with modern creativity.

Based on the 2024 economic impact numbers prepared by VTC, the Southwest Virginia Blue Ridge Highland Region generated the following impacts which allotted for three percent of Virginia's total spending.



\$1.08B	Total Direct Spending
9.85K	Total Employment Jobs
\$350.2M	Total Labor Income
\$42.9M	Total State Taxes
\$54.5M	Total Local Taxes

Anchor institutions such as the Southwest Virginia Cultural Center and Marketplace showcase regional art and traditions while serving as a gateway and brand ambassador for Southwest Virginia. Investments in youth sports facilities in the Town of Abingdon with The Meadows Sports Complex, Christiansburg with multiple facilities, and Pulaski County with a new indoor complex are all transforming the visitor economy by attracting families for multi-day tournaments and stimulating demand for new lodging and services. In Smyth County, outdoor recreation assets and revitalized downtowns such as Marion demonstrate the power of linking natural amenities with placemaking to strengthen community identity and tourism readiness. The following outlines the strengths, weaknesses, opportunities, and threats of the Blue Ridge Highlands region.

Based on Hunden's Pillars of Place assessment and feedback accumulated from extensive stakeholder engagement, which included regional focus groups, industry-represented steering committee, individual interviews, and a region-specific survey, a SWOT analysis was prepared for the region.

STRENGTHS

The Blue Ridge Highlands Region offers a diverse mix of tourism experiences, with its strongest assets concentrated in Recreation & Natural Environment, Hotels & Hospitality, Attractions & Gaming, Sports, and Authentic Architecture and Public Space Pillars. Points of Interest (POIs) within these categories emerged as the highest-performing attractions across the region and align closely with several of VTC's key lures for the area, which include outdoor recreation, music, and lodging. The region's proximity to Interstates 81 and 77 provides efficient access to major drive markets in North Carolina, Tennessee, West Virginia, and beyond, supporting year-round visitation.

Recreation & Natural Environment

Expansive mountain vistas, state and national parks, and signature trails such as the New River Trail, Hungry Mother State Park, Fairy Stone State Park, and Grayson Highlands State Park, Virginia Creeper Trail, New River Water Trail, and Appalachian Trail create a strong foundation for outdoor recreation and nature-based tourism. The region's landscapes are among the most compelling in the state. The Lodge at Primland, an Auberge Collection resort, ranked the #1 resort in America by Travel + Leisure for its 2025 World's Best Awards, leverages this scenery and draws international visitors seeking luxury Blue Ridge Mountain experiences that are only minutes from the Blue Ridge Parkway.

Arts & Culture

The region's deep ties to Appalachian music, supported by The Crooked Road and anchor events like the Bristol Rhythm & Roots Reunion, FloydFest, Front Porch Fest, Galax Fiddlers Convention, Appalachian Trail Days Festival, and Chautauqua Festival, all elevate its national visibility and reinforce its cultural identity.

Authentic Architecture & Inspiring Public Places

Investments in downtown revitalization in places such as Abingdon, Bristol, Marion, Floyd, Blacksburg, and Wytheville reflect a strong commitment to preserving local character while enhancing visitor amenities and placemaking.

Attractions & Gaming

Institutions including the Southwest Virginia Cultural Center and Marketplace, the Barter Theatre, Moss Arts Center, Floyd Country Store, The Wayne C. Henderson School of Appalachian Arts, and the Birthplace of Country Music Museum serve as key gateways, cultural anchors, and platforms for regional storytelling. Major attractions such as Lane Stadium at Virginia Tech and the newly developed Hard Rock Hotel and Casino Bristol are anchor attractions that draw hundreds of thousands of visitors each year.

WEAKNESSES

The region faces several key challenges that hinder its ability to maximize tourism growth. Infrastructure gaps in broadband access, inconsistent signage and wayfinding, and aging public facilities, reduce overall connectivity and complicate visitor navigation. Many local governments and destination marketing organizations operate with constrained resources, making it difficult to maintain consistent marketing efforts, support new product development, or sustain effective cross-regional collaboration. A shortage of boutique and higher end lodging further limits overnight visitation and reduces visitor spending, particularly in rural and gateway communities where there is lodging demand opportunity. Additionally, the region's broad geography and dispersed attractions can make itinerary planning more difficult without strong thematic or geographic clusters to guide visitors. These issues are compounded by a seasonal and event-driven economy, which leads to fluctuations in visitor spending and creates instability within the tourism workforce.



Bristol Rhythm & Roots Reunion

Southwest Virginia: Blue Ridge Highlands

OPPORTUNITIES

The Blue Ridge Highlands Region is well positioned to benefit from growing interest in outdoor recreation, authentic cultural experiences, and vibrant small-town destinations. Opportunities exist to strengthen the visitor economy by enhancing recreation infrastructure, elevating downtown vitality, diversifying lodging and hospitality offerings, and better coordination of regional storytelling. A core opportunity lies in expanding passenger rail service through the region. To ensure its success, it will be important to understand potential visitor travel patterns and identify the supporting infrastructure and mobility investments needed in communities that could experience future rail service expansion. These improvements, guided by the Pillars of Place, can reinforce the region's identity as a premier mountain destination and support long-term economic resilience.

Authentic Architecture & Inspiring Public Places

The region has an opportunity to further distinguish itself through vibrant, well-maintained downtowns that serve as gateways to surrounding recreation and cultural assets. By enhancing historic buildings, public spaces, and walkable environments, communities can reinforce the Blue Ridge Highlands' small-town charm while creating welcoming hubs for visitors, events, dining, and local commerce.

Recreation & Natural Environment

With a concentration of marquee trails, parks, and waterways, the Blue Ridge Highlands can strengthen its position as a premier outdoor destination by improving connectivity, access, and supporting services. Creating a more seamless network of trails and recreation hubs, paired with high-quality visitor amenities and outfitter experiences, presents an opportunity to capture longer stays and broaden appeal across seasons.

Hotels & Hospitality

Expanding the region's lodging and hospitality offerings represents a key opportunity to convert visitation into overnight demand. Experience-forward accommodations such as boutique hotels, unique stays, agritourism-driven stays, and nature-integrated lodging can complement the region's outdoor and cultural assets, elevate its profile as a drivable mountain escape, and position the Blue Ridge Highlands as a distinctive leisure and lifestyle destination.

THREATS

The region faces several threats that could limit its ability to compete effectively in the broader tourism landscape. Economic leakage remains a concern as visitors may spend money in nearby regions that offer more cohesive downtowns, stronger lodging options, and more fully developed hospitality amenities. Competitive pressure continues to grow as destinations in North Carolina, Tennessee, and West Virginia invest heavily in marketing, outdoor recreation, and lodging development, often outpacing the Blue Ridge Highlands in both scale and visibility. Aging infrastructure and an older workforce further constrain service capacity and limit the region's ability to support long-term tourism growth. In regions characterized by multiple towns and dispersed pockets of tourism activity, fragmented branding and inconsistent messaging across communities is a threat to be called out that can dilute the region's overall identity, reducing clarity and weakening its ability to stand out in an increasingly competitive tourism marketplace.

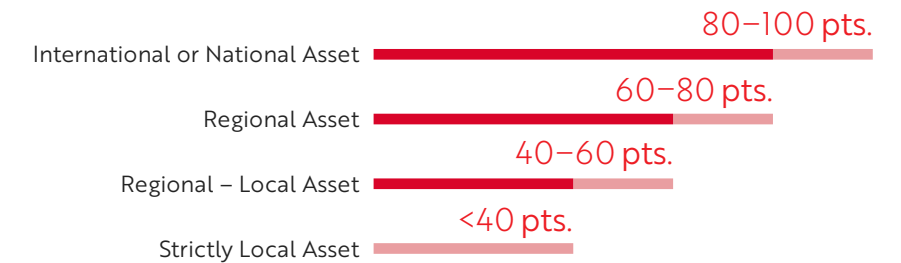


New River Stand-Up Paddle Boarding

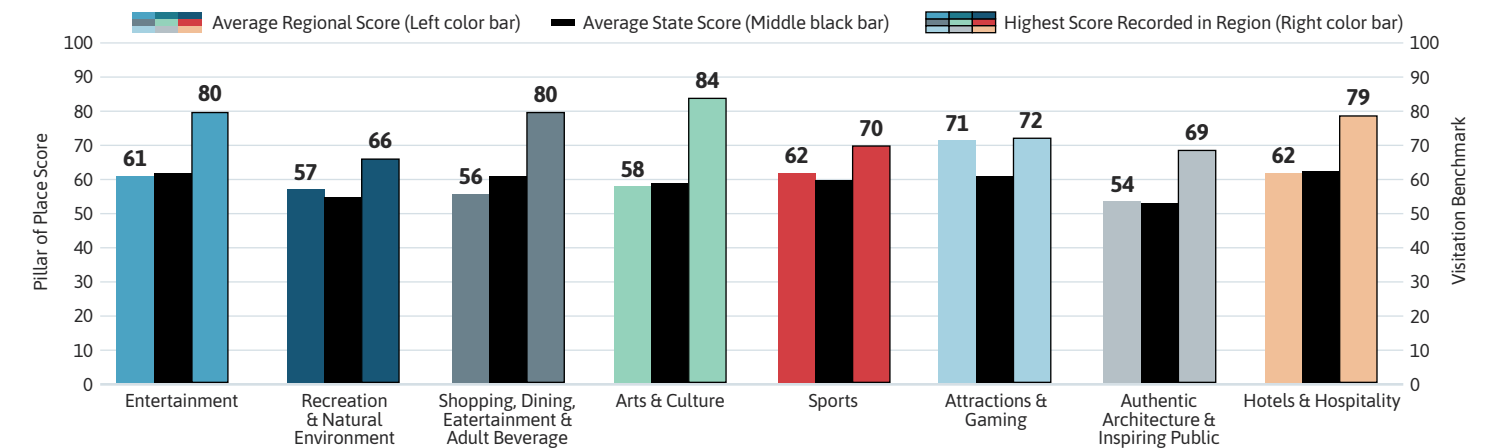
PILLARS OF PLACE – REGIONAL ASSET PERFORMANCE

VTC worked with stakeholders across the state in each region to identify relevant POIs for the tourism experience. Hunden scored and ranked the regional POIs as provided by VTC to analyze the regional performance of assets versus the average performance of assets across the state.

Assets were scored on a scale between 0 and 100 by a total of 20 different metrics. The scoring of assets was categorized in the following tiers shown on the right, while the regional pillar scores are shown in the table below:

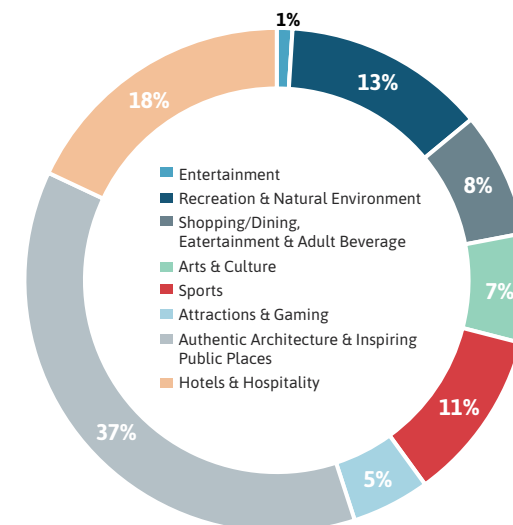


Pillars of Place Assessment | Southwest Virginia: Blue Ridge Highlands



The following graphic details the number of POIs within each Pillar of Place within the region.

Pillars of Place Assessment | Total POIs by Pillar



The assessment revealed strong performance in the Attractions & Gaming category, driven by Virginia Tech and the Hard Rock Hotel and Casino Bristol. Lower performance was observed in Conventions & Conferences, Shopping & Dining, and Authentic Architecture & Public Space. These findings informed the prioritization of product development recommendations and served as the basis for stakeholder and Steering Committee discussions.

Southwest Virginia: Blue Ridge Highlands

TARGET AUDIENCE PROFILES

The target audience analysis for the Blue Ridge Highlands region was conducted using a sample of the top assets across the Pillars to better understand both current visitor types and those most aligned with the region's offerings for future growth. The audience profiles were analyzed through Placer.ai access to Experian customer data based on current visitation.

The audience composition across the Blue Ridge Highlands reveals a concentrated yet well-matched visitor base. The three dominant Mosaic segments, Autumn Years, Golden Year Guardians, and Blue Sky Boomers, represent the majority of visitation across premier destinations. These groups tend to value approachable recreation, authentic cultural experiences, and the charm and comfort of small towns, all of which closely mirror the strengths of the Blue Ridge Highlands. Their presence underscores the region's ability to attract visitors who seek meaningful, place-based experiences, family-friendly activities, and affordable, accessible travel rooted in Appalachian culture and quality of life. It is worth noting that several signature points of interest in the region attract visitors from the affluent Power Elite segment. While this is not the predominant audience, there is meaningful potential to grow this market by expanding luxury offerings that create a customized experience while remaining authentic to the region's character.

This alignment between visitor motivations and regional offerings positions the Blue Ridge Highlands for strong, sustainable growth as it continues to refine and elevate its tourism assets.

J

Autumn Years

Mature, long-settled couples leading peaceful, community-centered lives in older single-family homes. Rooted in tradition and financial security, they enjoy quiet routines filled with hobbies, reading, and outdoor pastimes. Loyal to familiar brands and conservative in lifestyle, they value stability and local ties.

Q

Golden Year Guardians

Nation's oldest households, composed of retirees living comfortably in long-owned homes or settled retirement communities. Financially cautious and traditional, they value security, community involvement, and familiar routines over novelty or technology.

L

Blue Sky Boomers

Middle-class, near-retirement adults living in small towns and rural communities. Grounded in traditional values and modest lifestyles, they favor stability, outdoor recreation, and practical spending over luxury. Loyal to familiar brands and local stores, they prioritize affordability and American-made products.

Source: Placer.ai Experian Mosaic Segments

Primary in-state and nearby feeder markets include the Roanoke–Lynchburg metropolitan area, the New River Valley, and the Greater Richmond region, which generate steady demand from mature households seeking scenic, affordable, and culturally rich destinations. Adjacent and high-potential out-of-state markets include Greensboro, Winston-Salem, and Charlotte in North Carolina; the Tri-Cities area of Bristol, Johnson City, and Kingsport in Tennessee; and communities across eastern Kentucky and southern West Virginia, where retirees and near-retirement households value small-town charm, outdoor recreation, and Appalachian heritage. Additional secondary feeder markets such as Knoxville, Nashville, Charleston, South Carolina, and parts of central Ohio fall within a comfortable drive range and contain concentrations of stable, middle-income, and retiree households well matched to the region's authentic, place-based experiences.

The following regional priorities highlight the opportunities to enhance offerings catered toward the current regional target audience and to attract new target audience groups. Product recommendations were outlined to better position the Blue Ridge Highlands against its regional competitors within Virginia's top competitive statewide markets.

REGIONAL PRIORITIES

Regional priorities for product development and Pillar of Place enhancement were formulated based on regional scoring metrics and stakeholder feedback from in-person workshops, Steering Committee meetings, and virtual Focus Group workshops.

Authentic Architecture & Inspiring Public Places

Strengthening downtown environments remains essential to the region's long-term competitiveness. Efforts should focus on advancing revitalization projects that directly improve building conditions, activate key public spaces, and support a healthy mix of storefronts. Priorities include façade improvement programs, targeted streetscape enhancements, and expanded pedestrian connections, particularly within towns located along major travel routes. Supporting small business development through coordinated incentives, technical assistance, and retail recruitment strategies will further reinforce these downtown districts as welcoming gateways for visitors.

Recreation & Natural Environment

Enhancing and connecting outdoor recreation assets is critical to meeting growing visitor demand. The region should prioritize trail connectivity between the Virginia Creeper Trail, New River Trail State Park, Hungry Mother State Park, the New River Water Trail, Grayson Gravel Traverse Trail, Huckleberry Trail, Mendota Trail, Grayson Highlands State Park, and surrounding recreation hubs, while also improving trailheads, restrooms, river access points, and wayfinding to create a safer and more seamless user experience. Expanding the capacity of local outfitters, guides, rental operators, and gear retailers through targeted support and infrastructure investments will strengthen the region's position as a premier outdoor recreation destination. Opportunities exist to align with the foothills of the Blue Ridge Outdoor Recreation Plan findings and recommendations in the south-eastern part of the region. Additionally, leveraging the key scenic driving trails, including Blue Ridge Parkway and others, should continue to be a priority.

Hotels & Hospitality

Developing a broader and more innovative lodging base is key to capturing overnight visitation. The region should support the advancement of boutique hotels, unique stays, cabins, and outdoor hospitality products in strategic locations such as trail towns, revitalized downtowns, and major event destinations. Partnering with developers and local jurisdictions to identify and prepare investment-ready sites will accelerate this growth. Hospitality concepts that integrate wellness, agritourism, and nature-driven experiences should be encouraged to align with rising demand for high-quality, drivable mountain escapes. Nicewonder serves as a strong example of an integrated hospitality product that combines lodging, a vineyard, and a spa into a cohesive, experience-driven destination. Expanding similar offerings would elevate the region's profile and strengthen its recognition as a distinctive leisure and lifestyle hub.

Sports

The region is actively investing in the sports tourism industry. These investments demonstrate regional priority identification in areas such as Pulaski County with the 165,000-square foot Pulaski County Sportsplex which is expected to open in 2026 and The Meadows Sports Complex in Abington. Regional priorities in the sports tourism pillar should be to seek incremental investment in existing facilities, support the infrastructure around anchor assets such as the new Pulaski County facility to ensure success, and advocate for a cohesive sports tourism identity to draw major events. It should be noted that Lane Stadium and sports events at Virginia Tech are significant economic drivers for the region in this pillar. Providing additional things to do for visitors to these events in the surrounding region is advantageous and should be a continued priority for those driving in to events.

Entertainment

The region has rich music heritage, especially in Bristol and in towns along The Crooked Road. With the growth and exposure that the folk music scene continues to experience nationally, the region should prioritize collective strategies to bring the national audience into the region to experience the music heritage. Prioritizing a complete experience for visitors, ensuring that venues and spaces have the necessary infrastructure to accommodate, and aligning on the idea that regional entertainment exposure benefits and elevates all towns and entities.



FloydFest



Iron Heart Winery

Southwest Virginia: Blue Ridge Highlands

REGIONAL PRIORITIES (CONT.)

Conventions & Conferences

While a large standalone convention center is not feasible, the region can strengthen its event market through incremental investments in flexible gathering spaces and hotel or casino affiliated meeting space investment. Increasing the supply of hotel ballroom and meeting room space, small event halls, and municipal or privately operated venues will create new opportunities for small and mid-sized events. Supporting hotel-adjacent projects that provide at least 15,000 square feet of total function space will help attract regional meetings, sports groups, and specialty events. Expanding wedding and private event offerings is particularly promising given the area's scenic landscapes and growing interest in destination celebrations.

Shopping, Dining, Entertainment & Adult Beverage

Expanding culinary and entertainment offerings will play an important role in elevating the visitor experience and increasing spending. The region should continue to build out food trails, brewery and distillery partnerships, and farm-to-table programming to strengthen its culinary appeal. Encouraging and supporting restaurants and retailers to maintain extended evening and weekend hours and aligning around extended days open during peak periods will better support visitor activity patterns. Enhancing entertainment options, including live music, nighttime programming, and seasonal events within walkable downtowns, will further enrich the region's tourism ecosystem.

Attractions & Gaming

The region is anchored by several high-performing attractions and newly developed gaming assets, most notably Hard Rock Hotel and Casino Bristol, which has quickly become a major driver of visitation and regional visibility. While this asset generates substantial demand, stakeholder feedback consistently emphasized the importance of more effectively dispersing visitor activity and spending beyond the immediate host community. A core regional priority is the development of cohesive, multi-day itineraries that intentionally connect gaming and entertainment visitors with surrounding towns, cultural attractions, outdoor recreation assets, dining districts, and retail destinations. Strengthening partnerships between anchor attractions, local governments, DMOs, and small businesses will be essential to converting single-destination trips into broader regional experiences that maximize economic impact and support sustainable growth across the entire region.

Arts & Culture

The region's cultural identity can be strengthened by expanding collaboration and programming within the arts and music community. Enhancing the reach of The Crooked Road through coordinated marketing, cross-promotion, and experience packaging will deepen its role as a regional anchor. Developing new shoulder-season festivals and cultural events can stabilize visitation throughout the year and build on the success of events such as Bristol Rhythm and Roots Reunion. Supporting artist studios, galleries, and makerspaces will reinforce the region's Appalachian heritage while providing authentic experiences that resonate with visitors.

COMPETITORS

The Blue Ridge Highlands region competes directly with major mountain and outdoor recreation destinations across North Carolina, Tennessee, and West Virginia. These peer regions continue to invest heavily in tourism infrastructure, downtown revitalization, outdoor recreation, and branded storytelling, capturing many of the same travelers the Blue Ridge Highlands seeks to attract.

North Carolina: Asheville, Boone, Blowing Rock and the Blue Ridge Parkway Corridor

North Carolina's mountain destinations including Asheville, Boone, Blowing Rock, and the Blue Ridge Parkway corridor represent some of the most established competitors to the Blue Ridge Highlands. These communities benefit from deeply rooted cultural ecosystems, including Asheville's River Arts District, Boone's craft and folk art traditions, and the state-supported Blue Ridge Music Trails program, all of which reinforce a strong sense of place. A nationally recognized culinary and beverage scene, anchored by breweries such as Highland Brewing and complemented by dense clusters of chef-driven dining, attracts food and culture-oriented travelers. Walkable downtowns filled with galleries, boutiques, and upscale lodging options like the Foundry Hotel and Chetola Resort further enhance the visitor experience. Ongoing public and private investment in trails, river access, and Blue Ridge Parkway visitor enhancements continues to support growing outdoor visitation and positions the region as a polished, high-capacity mountain destination.

Tennessee: Northeast Tennessee, Tri-Cities Bristol, Johnson City, Kingsport, Knoxville, Pigeon Forge, Sevierville

In Northeast and Central Tennessee, cities such as Johnson City, Kingsport, and Knoxville have emerged as increasingly competitive mountain and outdoor tourism hubs through sustained downtown revitalization and lifestyle-oriented investment. Johnson City's Founders Park area exemplifies how public realm improvements and adaptive reuse have

helped attract younger, urban minded travelers. Significant growth in craft breweries, distilleries, and taprooms, often clustered in redeveloped industrial areas, has added to the region's appeal. At the same time, expanding trail systems like the Tweetsie Trail and the development of mountain biking destinations have strengthened Tennessee's draw among overnight outdoor enthusiasts. Boutique hotel development, including projects tied to the redevelopment of the John Sevier Center and supported by public funding, is further reinforcing the downtown core as a complete, stay-ready destination.

West Virginia: Southern West Virginia, New River Gorge Region

West Virginia's outdoor tourism landscape has been transformed in recent years, led by the New River Gorge National Park and Preserve, the Greenbrier Valley, and the Hatfield-McCoy Trail System. The National Park designation has elevated the New River Gorge to national prominence, placing it on must-see travel lists and spurring new investment in outfitters, climbing schools, and hospitality in Fayetteville and nearby communities. Full-service adventure resorts such as ACE Adventure Resort and Adventures on the Gorge offer integrated experiences that combine rafting, ziplining, lodging, and dining, making trip planning seamless for visitors. The Hatfield-McCoy Trail System adds another powerful draw, with hundreds of miles of interconnected ATV trails supported by lodging clusters and trailhead services. These assets are reinforced by the state's highly effective Almost Heaven branding campaign, which has generated strong national awareness, media attention, and digital engagement.

COMPETITOR SUMMARY

Despite growing competition from nearby destinations, the Blue Ridge Highlands retains a distinctive place in the market. The region's authentic small-town character, reflected in communities such as Abingdon, Marion, Wytheville, and many others combines with cultural assets like The Crooked Road, Southwest Virginia Cultural Center & Marketplace, The Floyd Country Store, the Rex Theater, and the Barter Theatre to create a deeply rooted Appalachian experience. Strong accessibility along Interstates 81 and 77 give the region an advantage over more remote competitors, while uncrowded outdoor assets like the Appalachian Trail, New River Trail State Park, Grayson Highlands State Park, and Mount Rogers Recreation Area offer a quieter and more restorative alternative to high-traffic destinations. These qualities position the Blue Ridge Highlands as a place where visitors can experience genuine culture, accessible recreation, and a more relaxed mountain environment.



Virginia Creeper Trail

Southwest Virginia: Blue Ridge Highlands

TACTICAL RECOMMENDATIONS

Grounded in the Pillars of Place assessment and informed by stakeholder engagement across the region, Hunden recommends prioritizing targeted Pillar areas that will strengthen and diversify Blue Ridge Highlands tourism economy. These tactical recommendations reflect the region's momentum in outdoor recreation, small-town revitalization, and arts and culture, while addressing key needs in lodging, connectivity, and regional branding. A core finding in Hunden's work that extends beyond the Pillars of Place assessment is the opportunity for expanded Amtrak and other passenger rail service. This potential investment represents a significant opportunity for the region, offering a new gateway for visitation and access. The state and region should not only support efforts to bring more visitors via rail, but also encourage coordinated transportation, expansion, and cross-promotion strategies that enable these travelers to easily experience destinations and communities beyond the immediate station area.

Successful implementation of all tactical recommendations will require close collaboration with VTC, local governments, regional economic development organizations, DMOs, and private-sector partners to secure funding, support new product development, and elevate the region's overall competitiveness.

Authentic Architecture & Inspiring Public Places

- Invest in downtown development and small business growth by reducing barriers, offering targeted resources, and expanding placemaking initiatives that strengthen walkability and visitor experience.
- Support continued revitalization efforts through partnerships with organizations such as the Virginia Main Street program to enhance storefronts, public spaces, and historic preservation.
- Support passenger rail connectivity to enhance regional access, stimulate new investment, and broaden the market reach for both leisure and business travelers.
- Strengthen advocacy, marketing, and staffing capacity to better connect tourism efforts with broader economic development strategies.
- Enhance regional collaboration through shared marketing platforms, unified branding initiatives, and coordinated event calendars to help the region compete more effectively with neighboring destinations.

Shopping, Dining, Entertainment & Adult Beverage

- Develop and promote a culinary and craft beverage trail connecting Floyd, Abingdon, and Bristol to anchor the region's food and beverage identity and drive cross-regional visitation and build on the Mountain Spirit Trail.
- Encourage expanded evening and weekend hours and recruit higher-quality dining options to strengthen destination appeal and visitor spending.
- Explore an additional purpose-built food hall or activatable space to showcase these offerings all in one place, similar to The Commons in Abingdon.

Hotels & Hospitality

- Create a regional lodging investment strategy that focuses on boutique hotels, adaptive reuse concepts, and unique stays that elevate the region's hospitality offerings and meet rising visitor expectations.
- Combine this strategy with the momentum in the youth sports tourism projects that have been completed or are in process in the region. There is a need for hotels to support this new inbound sports tourism activity.

Recreation & Natural Environment

- Expand trail connectivity and visitor amenities to reinforce the region's identity as an outdoor recreation hub.
- Improved access points, rest areas, and signage will enhance safety and allow visitors to explore a more cohesive trail network.

The tactical recommendations for the Blue Ridge Highlands are reinforced by patterns observed in competing destinations across North Carolina, Tennessee, and West Virginia. Peer regions have demonstrated that coordinated investment in downtown placemaking, trail and outdoor infrastructure, culinary and craft beverage clusters, and boutique lodging is essential to converting outdoor demand into overnight visitation and sustained economic impact. The Blue Ridge Highlands should seek to replicate these proven strategies while differentiating itself through its authentic small-town character, deeply rooted Appalachian music and arts heritage, lower congestion, and superior regional accessibility via interstate and potential passenger rail connections. By emphasizing quality over scale and experience over volume, the region can position itself as a more approachable, culturally rich alternative to higher-traffic mountain markets while remaining competitive for both visitors and investment.

CONCLUSION

The Blue Ridge Highlands Region possesses one of Virginia's strongest combinations of scenic beauty, cultural authenticity, and creative energy. Yet many communities remain under-resourced and require sustained support to strengthen their tourism and economic foundations. Aligning tourism development with economic development is essential to long-term regional vitality.

Targeted investments in lodging, public spaces, downtown revitalization, and tourism infrastructure will extend visitor stays and enhance community pride. Anchored by its music heritage, outdoor recreation, sports tourism investments, and welcoming small towns, the Blue Ridge Highlands offers a distinctive sense of place that appeals to both regional visitors and national audiences. With continued commitment to placemaking, infrastructure, and regional branding, the area is positioned to grow as a premier mountain destination delivering lasting cultural and economic benefits.

Southwest Virginia: Heart of Appalachia

STATE OF THE REGION

The Heart of Appalachia Region encompasses Virginia's seven coalfield counties: Buchanan, Dickenson, Lee, Russell, Scott, Tazewell, and Wise, along with the city of Norton. It is defined by dramatic mountain landscapes, an extensive trail network, distinct Appalachian heritage, and a strong sense of place rooted in coal mining, music, and artisan traditions. Visitors are drawn to its off-the-beaten-path character, abundant outdoor recreation, and authentic small-town communities. Through extensive collaboration with regional partners, VTC conducted a comprehensive analysis of tourism assets to identify key visitor destinations across the Southern region. This process included detailed data collection, validation, and scoring to ensure accuracy and regional relevance, supporting the broader goal of elevating and promoting the region's existing tourism product. All evaluations were completed using VTC's standardized asset list and methodology to maintain consistency across the Southwest Virginia- Heart of Appalachia Region.

Based on the 2024 economic impact numbers prepared by VTC, the Southwest Virginia Heart of Appalachia Region generated the following impacts which allotted for 0.7 percent of Virginia's total spending.



\$225.7M	Total Direct Spending
1.99K	Total Employment Jobs
\$56.4M	Total Labor Income
\$6.0M	Total State Taxes
\$8.8M	Total Local Taxes

Tourism development has accelerated through new trail investments, expanding marketing efforts, and continued investment in outdoor recreation development. However, challenges of access, lodging diversity, and wayfinding signage continue to constrain overnight visitation and regional connectivity.

Despite strong competition from nearby states investing heavily in outdoor recreation and tourism branding, the Heart of Appalachia remains well positioned to capture increasing demand for immersive and authentic travel experiences. With improved lodging, stronger infrastructure, and a cohesive regional mindset, the area can reinforce its identity as Virginia's premier Appalachian adventure and heritage destination. The following outlines the strengths, weaknesses, opportunities, and threats of the Heart of Appalachia Region.

Based on Hunden's Pillars of Place assessment and feedback accumulated from extensive stakeholder engagement, which included regional focus groups, industry-represented steering committee, individual interviews, and a region-specific survey, a SWOT analysis was prepared for the region.

STRENGTHS

The strengths of the Heart of Appalachia align closely with the region's top visitor lures, particularly its renowned outdoor recreation, dramatic landscapes, extensive trail systems, motorsports culture, and deep musical heritage. These assets perform strongly across the Pillars of Place framework, reinforcing the region's position as an authentic Appalachian destination with a compelling blend of natural and cultural experiences.

Recreation & Natural Environment

The region offers extensive outdoor recreation infrastructure, including well-established Spearhead Trails ATV/UTV systems, multi-use trails, and trailheads that consistently attract adventure travelers. These assets support year-round visitation and position the area as a premier destination for motorized and non-motorized outdoor activities. Unique natural destinations such as Breaks Interstate Park, Natural Tunnel State Park, Clinch River State Park, and Wilderness Road State Park provide dramatic geography, breathtaking vistas, elk tours, and diverse built amenities ranging from lodging to outdoor adventure offerings that draw visitors from across the region and beyond. Other notable outdoor assets include Birch Knob Tower, High Knob Tower, Devil's Bathtub, and The Channels.

Arts & Culture

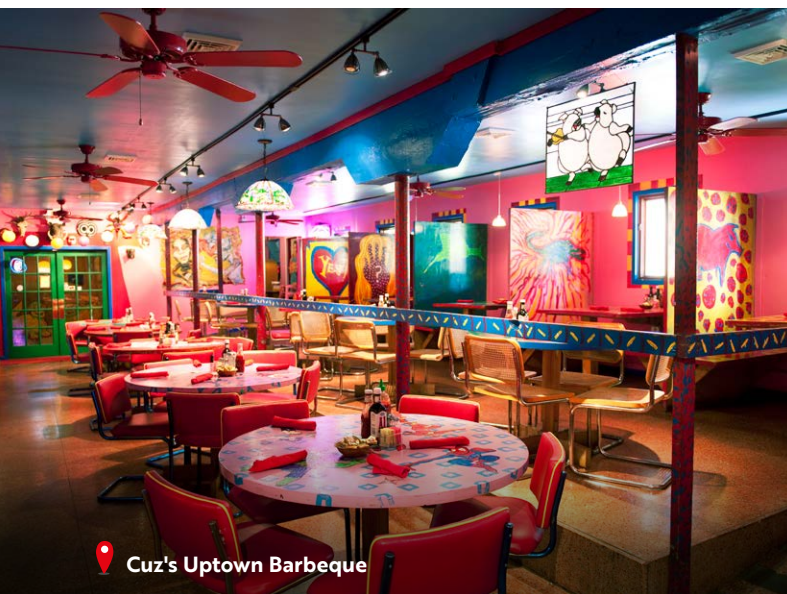
The Heart of Appalachia boasts a deep-rooted musical heritage and artisan culture that is distinct to the region. This authenticity is reflected in local shops, community festivals such as Blue Highway Fest, Ralph Stanley Hills of Home, Clinch River Days, Best Friends Festival, and Cedar Fest; music venues such as Carter Family Fold, and the Ralph Stanley Museum; and a culinary scene highlighted by establishments such as Cuz's Uptown Barbeque, Woodbooger Grill, The Heritage Table, and many others that celebrate Appalachian traditions, creating engaging, place-based visitor experiences.

Authentic Architecture & Inspiring Public Places

The region's historic downtowns, characterized by preserved architecture, pedestrian-friendly streets, and locally owned shops and eateries, serve as vibrant gateways into its cultural heritage. Examples include St. Paul, Tazewell, Big Stone Gap, and Gate City. These authentic community cores provide a compelling sense of place for visitors seeking meaningful, place-based experiences. Additionally, the area's scenic winding roads and picturesque small towns make it especially appealing to motorcyclists frequenting rides to Back of the Dragon and other places along many of the beautiful roadways that traverse the region.

WEAKNESSES

The region faces several challenges that limit its ability to maximize tourism growth. Major obstacles of accessibility and connectivity remain, with interstate access, terrain, and the absence of direct air service making travel to and within the area difficult. Travel times from major metropolitan regions are long and public transportation options are minimal. Lodging variety is also constrained; while boutique and experiential options such as cabins, glamping, and small inns are beginning to grow, the overall inventory and consistency in quality remain nascent. Digital visibility presents another barrier, with many tourism assets under-promoted online and inconsistent marketing, branding, and web presence reducing the region's reach. Infrastructure gaps, including inconsistent wayfinding, signage, and visitor services such as visitor centers, rest stops, and amenities, can further hinder the visitor experience. Additionally, the region can be perceived as remote or economically distressed, a perception that at times overshadows its natural beauty and cultural appeal.



Cuz's Uptown Barbeque



Breaks Interstate Park

Southwest Virginia: Heart of Appalachia

OPPORTUNITIES

The region is well positioned to build on its strong sense of place, natural assets, and cultural heritage by focusing on a set of high-level opportunities that strengthen the visitor experience and support long-term economic vitality. These opportunities reflect both market demand and stakeholder input and are intended to guide future investment by reinforcing the region's competitive advantages rather than prescribing specific projects. At a strategic level, the greatest opportunities center on elevating outdoor recreation as a complete destination experience, expanding lodging options to support overnight visitation, and strengthening cultural and community assets through coordinated regional storytelling and placemaking.

Recreation & Natural Environment

The region's natural beauty, outdoor recreation assets, and wildlife form the foundation of its tourism identity and present an opportunity to further position the area as a premier outdoor destination. By continuing to invest in trails, access points, wayfinding, and visitor-support infrastructure, the region can enhance usability, safety, and connectivity across recreation assets. Aligning these efforts with the Southwest Virginia Powell & Clinch Outdoor Recreation Plan creates an opportunity to package outdoor experiences more effectively and compete with neighboring destinations that already offer more integrated recreation, lodging, and dining experiences.

Hotels & Hospitality

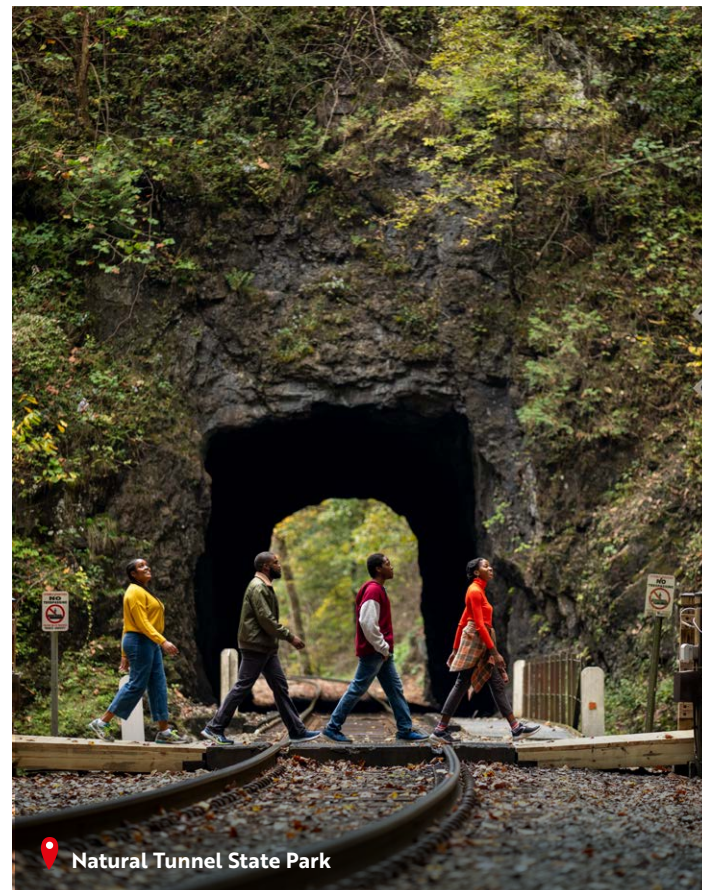
Expanding lodging options represents one of the region's most significant opportunities to capture overnight stays and increase visitor spending. While development in remote areas presents challenges, there is strong potential to attract unique stays, small-scale hotels, and experience-driven accommodations that align with the region's outdoor and cultural character. Targeting niche visitor segments such as motorcycle tourists, outdoor enthusiasts, and heritage travelers provides an opportunity to support lodging development that meets specific market needs while strengthening the region's overall hospitality ecosystem.

Arts & Culture | Authentic Architecture & Inspiring Public Places

The region's small towns, historic architecture, and cultural traditions present an opportunity to elevate arts, culture, and placemaking through a coordinated regional approach. Building on established assets such as The Crooked Road and the 'Round the Mountain Artisan Network can deepen storytelling, increase visibility, and encourage cross-community visitation. By investing in public spaces and historic structures in ways that honor local history and industrial heritage, the region can create authentic environments that resonate with visitors and attract interest from American heritage brands seeking meaningful, place-based narratives.

THREATS

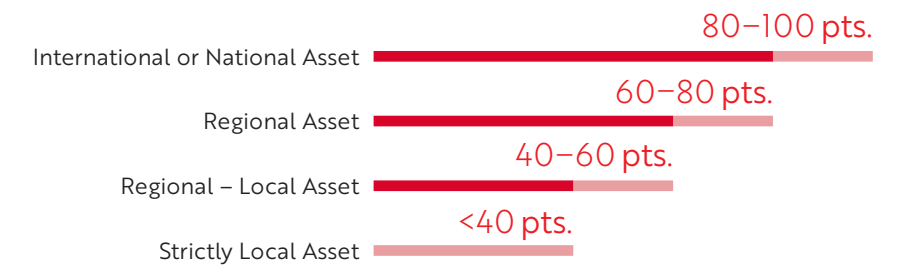
The region faces several threats that could hinder long-term tourism growth. Population decline continues to shrink the available workforce, limiting the ability of tourism and hospitality businesses to fill essential roles in lodging, dining, attractions, and retail. As younger residents leave for larger metropolitan areas and fewer new households move in, staffing shortages reduce operating capacity, diminish service quality during peak seasons, and make the region less attractive to investors who depend on a reliable labor pool. At the same time, competition from nearby regions in West Virginia, Eastern Kentucky, Tennessee, and North Carolina is intensifying as these areas invest heavily in outdoor recreation, lodging, and tourism branding. Their stronger infrastructure and marketing reach can draw visitors away and apply pressure to the Heart of Appalachia's growing tourism offerings. Perception challenges also persist, as the region's rural identity, coal-related history, and relative remoteness can shape visitor expectations and awareness. Without cohesive messaging and modernized branding, the area risks being overshadowed by destinations with more established reputations.



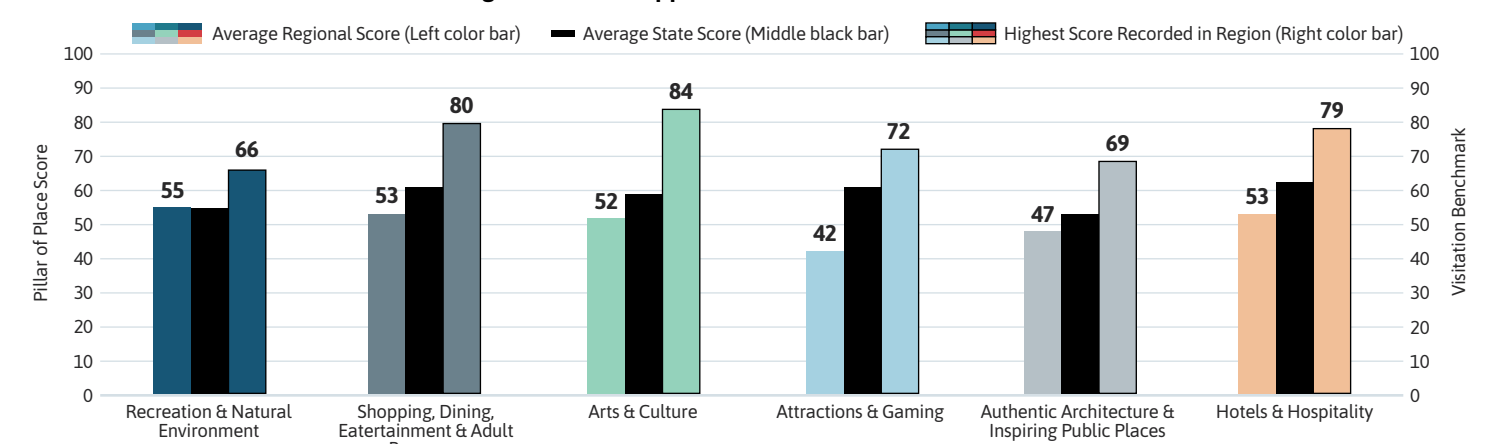
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Assets were scored on a scale between 0 and 100 by a total of 20 different metrics. The scoring of assets was categorized in the following tiers shown on the right, while the regional pillar scores are shown in the table below:

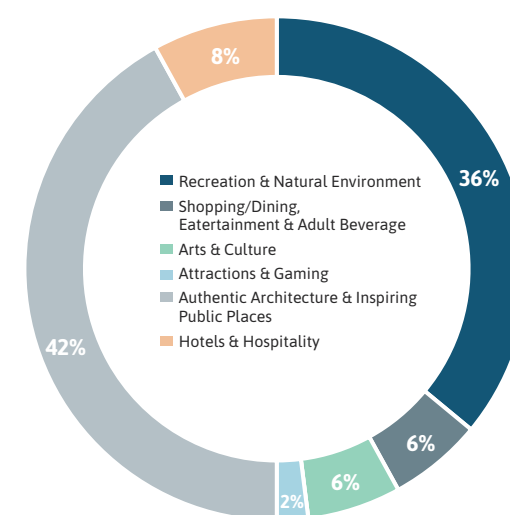


Pillars of Place Assessment | Southwest Virginia: Heart of Appalachia



The following graphic details the number of POIs within each Pillar of Place within the region.

Pillars of Place Assessment | Total POIs by Pillar



The Heart of Appalachia shows strong concentration in Authentic Architecture & Public Space and Recreation & Natural Environment, reflecting its outdoor and cultural strengths. Gaps remain in Hotels & Hospitality, Attractions & Gaming, and Conventions & Conferences, indicating clear opportunities for product development and investment that align with statewide visitation trends.

The comparison of regional POI scores versus statewide POI scores did not explicitly dictate the prioritization of future product development recommendations but rather served as a snapshot of regional performance; however, with future recommended development, the region's score by Pillar would increase closer to the National Asset classification. This analysis served as a platform for discussion during regional Steering Committee and Focus Group meetings.

Southwest Virginia: Heart of Appalachia

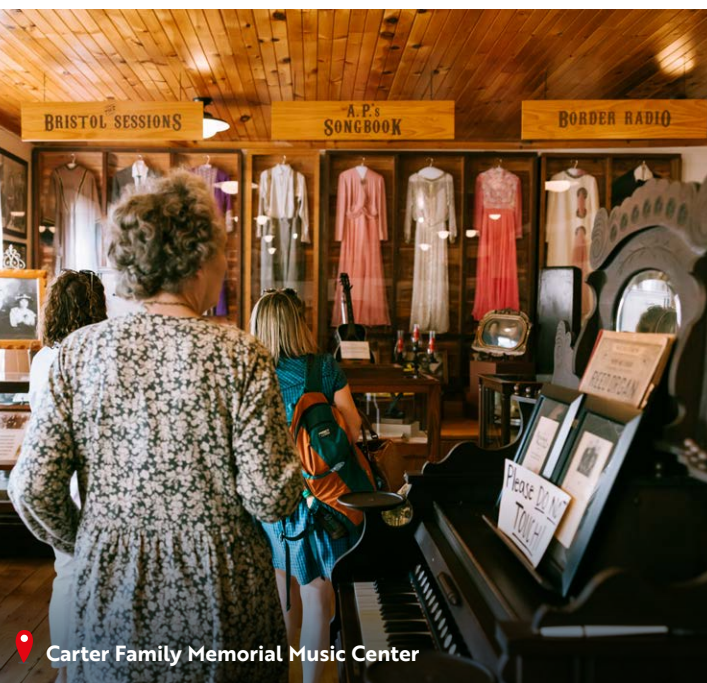
TARGET AUDIENCE PROFILES

The target audience analysis for the Heart of Appalachia region was conducted using a sample of top-performing assets across the Pillars of Place to understand both current visitor profiles and the audiences most aligned with the region's offerings for future growth. The audience profiles were analyzed through Placer.ai access to Experian customer data based on current visitation.

The audience composition across the Heart of Appalachia reveals a concentrated and well-aligned visitor base that reflects the region's strengths in outdoor recreation, heritage, and small-town character. The dominant Mosaic segments visiting the region value approachable, nature-based activities, authentic cultural experiences, and traditional community-oriented environments, qualities that are central to the Heart of Appalachia's identity. Their travel patterns demonstrate strong interest in scenic landscapes, trail systems, music and artisan heritage, and the welcoming atmosphere of the region's towns and communities.

This strong alignment between visitor motivations and the region's natural and cultural assets positions the Heart of Appalachia for sustainable tourism growth as it continues to enhance its outdoor recreation experiences, elevate heritage storytelling, and strengthen its distinctive sense of place.

The target audience profile reflects that of the Blue Ridge Highlands, which draws a similar demographic based on its comparable amenities and attractions.



Carter Family Memorial Music Center

J

Autumn Years

Mature, long-settled couples leading peaceful, community-centered lives in older single-family homes. Rooted in tradition and financial security, they enjoy quiet routines filled with hobbies, reading, and outdoor pastimes. Loyal to familiar brands and conservative in lifestyle, they value stability and local ties.

Q

Golden Year Guardians

Nation's oldest households, composed of retirees living comfortably in long-owned homes or settled retirement communities. Financially cautious and traditional, they value security, community involvement, and familiar routines over novelty or technology.

L

Blue Sky Boomers

Middle-class, near-retirement adults living in small towns and rural communities. Grounded in traditional values and modest lifestyles, they favor stability, outdoor recreation, and practical spending over luxury. Loyal to familiar brands and local stores, they prioritize affordability and American-made products.

Source: Placer.ai Experian Mosaic Segments

Primary in-state feeder markets include Roanoke, Lynchburg, the New River Valley, and the greater Richmond area, which generate consistent visitation from mature and near-retirement households seeking scenic, affordable, and culturally authentic destinations. Adjacent out-of-state feeder markets include eastern Kentucky communities such as Pikeville, Hazard, and Ashland; southern West Virginia including Charleston, Beckley, and Bluefield; and Northeast Tennessee cities such as Bristol, Kingsport, and Johnson City, all of which share similar small-town, Appalachian-oriented demographics and a strong interest in outdoor recreation and heritage travel. Additional secondary feeder markets within a comfortable drive range include Greensboro and Winston-Salem in North Carolina, Knoxville and Chattanooga in Tennessee, and parts of central Ohio, where stable, middle-income, and retiree populations show strong alignment with the Heart of Appalachia's nature-based experiences, music heritage, and welcoming community character.

The following regional priorities highlight the opportunities to enhance offerings catered toward the current regional target audience and to attract new target audience groups. Product recommendations were outlined to better position the Heart of Appalachia against its regional competitors within Virginia's top competitive statewide markets.

REGIONAL PRIORITIES

Regional priorities for product development and Pillar of Place enhancement were formulated based on regional scoring metrics and stakeholder feedback from in-person workshops, Steering Committee meetings, and virtual Focus Group workshops.

Sports

Given the geography and rural character of the Heart of Appalachia, most sports facilities and programs are community driven and primarily serve local and regional needs. Continued investment in this pillar is important for quality of life, youth engagement, and community health; however, traditional sports facilities are unlikely to function as a primary tourism driver for the region. Instead, regional entities should prioritize outdoor sports and recreation, including trail-based activities, motorsports, and adventure recreation, which align more closely with the region's natural assets and have greater potential to attract overnight visitors while still delivering meaningful community benefit.

Entertainment

Expanding ticketed entertainment that leverages the region's rich musical and cultural heritage remains a key priority. The Heart of Appalachia is well positioned to grow its reputation as a live music and cultural performance destination, supported by existing venues and performance spaces throughout the region. Ensuring a high-quality visitor experience that integrates live entertainment with local dining, craft beverage offerings, and walkable downtown environments should be a core focus. Creating cohesive, event-driven experiences that feel authentic to place will help differentiate the region and encourage longer stays.

Conventions & Conferences

The region's convention and conference infrastructure is limited, with meetings and events typically accommodated in local businesses, theaters, community centers, or municipal facilities. While large-scale convention development is unlikely, targeted investment in flexible, multi-use facilities can support small to mid-sized meetings, retreats, and educational programming. Projects such as the High Knob Destination Center demonstrate how dynamic spaces can serve as visitor gateways, interpretive centers, and event venues. Replicating this model at a modest scale can strengthen the region's ability to host group activity without compromising its small-town character.

Recreation & Natural Environment

The Heart of Appalachia is widely recognized for its outdoor recreation opportunities, scenic landscapes, and abundant wildlife, which collectively form the backbone of the region's tourism identity. Continued investment in trails, access points, visitor amenities, wayfinding, and supporting infrastructure is essential to remain competitive with surrounding destinations that offer similar natural assets paired with more developed hospitality ecosystems. Huden strongly encourages ongoing support and alignment with the key plans within the region. Coordinated advocacy and implementation of these plans will be critical to strengthening the region's outdoor recreation economy and enhancing the visitor experience.



Powell Valley Overlook

Southwest Virginia: Heart of Appalachia

REGIONAL PRIORITIES (CONT.)

Attractions & Gaming

Unlike some surrounding regions, the Heart of Appalachia does not rely on large-scale, purpose-built attractions or gaming facilities as primary visitation drivers. Instead, the region's land, geography, outdoor recreation infrastructure, and cultural heritage function as its core attractions. As such, priorities should focus on strengthening and enhancing these existing assets rather than pursuing stand-alone attractions that may not align with the region's identity. Investment should emphasize access, interpretation, and experience development that allows visitors to more fully engage with the landscapes, communities, and stories that define the region.

Hotels & Hospitality

Attracting lodging investment represents one of the region's highest priorities and greatest challenges. While remote locations and smaller markets can complicate traditional hotel development, there are meaningful opportunities to attract unique and experience-driven lodging concepts. Boutique inns, cabins, glamping resorts, and adaptive reuse projects are well suited to the region and align with visitor demand for authentic Appalachian stays. Expanding lodging options will also support key visitor segments such as motorcycle tourists, outdoor adventurers, and users of the Spearhead Trail system, enabling longer stays and increased visitor spending.

Shopping, Dining, Entertainment & Adult Beverage

There is a clear need to strengthen the region's food, beverage, and dining offerings to support both residents and visitors. Successful outdoor and heritage destinations consistently pair recreation with high-quality local dining, breweries, wineries, distilleries, and culturally authentic gathering places. Expanding these offerings will improve visitor convenience, extend length of stay, and increase overall spending. Investment in distinctive, locally owned establishments that reflect Appalachian culture should be prioritized to enhance the region's appeal and sense of place.

Arts & Culture

The Heart of Appalachia is composed of many small, dispersed communities, which can limit access to arts and cultural experiences when approached individually. A regional approach to arts, culture, events, and future investment is essential to maximize impact and visibility. Building on established assets such as The Crooked Road and the 'Round the Mountain Artisan Network will continue to elevate the region's musical and craft heritage. In addition, targeting American heritage brands seeking authentic storytelling opportunities can further amplify exposure, attract new audiences, and stimulate complementary investment.

Authentic Architecture & Inspiring Public Places

Preserving and celebrating the region's historic character should remain a central priority. Investments in restoring historic storefronts, reactivating main streets, and enhancing public spaces offer opportunities to honor the region's coal mining legacy and broader Appalachian history. Thoughtful placemaking that reflects local stories and materials can strengthen community pride, improve visitor experience, and reinforce the authenticity that differentiates the Heart of Appalachia from more commercialized destinations.

COMPETITORS

Kentucky, North Carolina, Tennessee, and West Virginia form the Heart of Appalachia's primary competitive set. Within these states, the most comparable regions include Eastern and Southeastern Kentucky (Daniel Boone National Forest and surrounding state parks), Western North Carolina (Great Smoky Mountains region and Blue Ridge communities), East Tennessee (Great Smoky Mountains and Cumberland Gap), and Southern West Virginia (New River Gorge National Park & Preserve).

Kentucky: Eastern & Southeastern Kentucky

Daniel Boone National Forest and surrounding state parks

Eastern and Southeastern Kentucky function as one of the Heart of Appalachia's most direct competitors due to shared Appalachian terrain, deep frontier history, and a strong outdoor recreation identity. Anchored by Daniel Boone National Forest, Carter Caves Resort Park, and state resort parks such as Jenny Wiley and Cumberland Falls, the region has long been positioned as a premier destination for hiking, climbing, caving, and lake-based recreation. Nationally recognized natural landmarks such as Red River Gorge have built strong awareness among adventure travelers, photographers, and climbers, reinforcing Kentucky's reputation within the outdoor tourism market. The state further extends its competitive reach through a well-established network of state parks, a clear identity rooted in frontier heritage, and a broad inventory of iconic outdoor attractions that are widely recognized by national audiences. While Kentucky offers scale and name recognition, the Heart of Appalachia differentiates itself through a less congested and more tranquil experience, with comparable outdoor amenities but fewer crowds and a more undiscovered character. The region also delivers a stronger concentration of authentic cultural assets, including coal heritage, Appalachian music traditions, and historic small towns, allowing visitors to form a deeper connection to place and a more immersive understanding of Appalachian history.

Tennessee: East Tennessee

Gatlinburg, Pigeon Forge, Sevierville

East Tennessee competes with the Heart of Appalachia through its proximity to the Great Smoky Mountains and its ability to combine outdoor recreation, historical interpretation, and large-scale entertainment. Gateway communities such as Gatlinburg, Pigeon Forge, and Sevierville offer extensive lodging, dining, family attractions, and entertainment districts, supporting one of the Southeast's most robust tourism economies. Cumberland Gap National Historical Park further strengthens the region's frontier heritage narrative and attracts visitors interested in early American history. East Tennessee draws a similar mix of outdoor adventurers, heritage travelers, families, and cultural explorers, while maintaining a clear advantage in tourism infrastructure, including hotel inventory, attractions, and multi-season entertainment options. In contrast, the Heart of Appalachia provides a quieter and more intimate alternative to Tennessee's highly commercialized and often crowded destinations. Visitors seeking authentic Appalachian landscapes without heavy traffic and strip development find the Heart of Appalachia more appealing, particularly as the

region's emerging adventure offerings, such as ATV systems, waterfalls, and traditional music experiences, allow it to compete in niche segments that Tennessee's mainstream leisure corridors frequently overlook.

West Virginia: Southern West Virginia, New River Gorge Region

Heart of Appalachia competes directly with Southern West Virginia through the national prominence of the New River Gorge National Park and Preserve, one of the country's newest national parks and a rapidly growing adventure tourism hub. The region is widely known for world-class whitewater rafting, rock climbing, mountain biking, and dramatic scenic views, supported by a mature network of outfitters and adventure service providers. National park designation has significantly elevated its visibility and positioned the area as a premier destination for high adrenaline outdoor recreation. Both regions appeal to similar demographics of adventure seekers, outdoor enthusiasts, and road trippers exploring the Appalachian Mountains, with West Virginia holding a competitive advantage in signature adventure assets and a cohesive statewide brand through the Almost Heaven campaign. Where the Heart of Appalachia stands out is in its broader and more diverse mix of cultural, historical, and musical experiences integrated with outdoor recreation. While the New River Gorge is largely defined by a single hero asset, the Heart of Appalachia offers a wider combination of activities, including ATV and UTV adventures, fishing, lakes and rivers, scenic byways, coal heritage, frontier history, live music, and authentic small-town experiences. Lower congestion and easier access to trails and scenic areas further enhance its appeal to visitors seeking a relaxed and less commercial alternative to high traffic adventure destinations. Pushing this in marketing, bolstering infrastructure that promotes this quality of a visit, is important in differentiating the region from this region of West Virginia.

COMPETITOR SUMMARY

Despite competing with regions that boast higher visitation, stronger infrastructure, and widely recognized attractions, the Heart of Appalachia distinguishes itself through its tranquility, authentic Appalachian heritage, and compact mix of diverse outdoor experiences. Its affordability, accessibility, and deeply rooted cultural identity resonate strongly with families, heritage travelers, and outdoor enthusiasts. Together, these qualities create an "undiscovered Appalachian" appeal that sets the region apart from more commercialized destinations and positions it as a uniquely compelling place to explore.

Southwest Virginia: Heart of Appalachia

TACTICAL RECOMMENDATIONS

Based on the Pillars of Place analysis and extensive stakeholder engagement, Hunden recommends focusing on targeted Pillar areas that will most effectively enhance the tourism ecosystem in the Heart of Appalachia. These tactical recommendations build upon the region's core strengths in outdoor recreation, cultural heritage, and authentic small-town character while addressing gaps in connectivity, lodging, and visitor support infrastructure. Advancing these priorities will require coordinated collaboration with VTC, local governments, regional economic development partners, destination marketing organizations, and community stakeholders to secure funding, align resources, and support both existing assets and new product development.

Hotels & Hospitality

- Encourage hospitality investment through regional or state incentive programs, strategic partnerships, coordinated marketing, and targeted land acquisition to ensure development-ready sites.
- Additional staffing dedicated to tourism and business attraction may also be needed to sustain momentum.
- Prioritize boutique and unique lodging concepts, particularly properties of 100 rooms or fewer, that reflect the character of the region and appeal to visitors seeking authentic and intimate Appalachia-based stays.
- Glamping hospitality resorts is a significant trend that the region can target and attract.

Authentic Architecture & Inspiring Public Places

- Direct investment into local downtowns by leveraging programs such as the Virginia Main Street program and exploring municipal-led approaches that support entrepreneurs, reduce barriers to entry, and activate vacant or underutilized buildings with destination-building businesses.
- Improve regional signage and wayfinding systems and address barriers that limit consistent installation. A unified signage approach will help reinforce a cohesive regional identity, improve navigation, and increase visibility of key attractions for drive-through travelers.

Recreation & Natural Environment

- Strengthen the region's identity as an outdoor destination by building on its holistic brand, highlighting the combination of rich cultural heritage, high-quality lodging, strong food and beverage experiences, and proximity to signature outdoor attractions.
- Identify and invest in existing recreational hot spots, such as popular trailheads or areas with demonstrated local momentum, to enhance visitor amenities and create stronger recreation clusters.

The tactical recommendations for the Heart of Appalachia are reinforced by lessons from competing regions in Kentucky, Tennessee, and West Virginia, where sustained investment in outdoor recreation infrastructure, lodging capacity, downtown activation, and branded storytelling has translated into higher visitation and longer stays. These markets demonstrate the importance of clustering recreation assets with lodging, dining, and visitor services to convert interest into overnight demand. The Heart of Appalachia should aim to replicate these proven fundamentals while intentionally differentiating itself through its lower congestion, affordability, and deeper integration of outdoor recreation with authentic Appalachian culture, music, coal heritage, and small-town experiences. By emphasizing quality, access, and authenticity over scale and commercialization, the region can position itself as a compelling alternative to heavily trafficked mountain destinations and strengthen its appeal to visitors seeking immersive, place-based experiences.

CONCLUSION

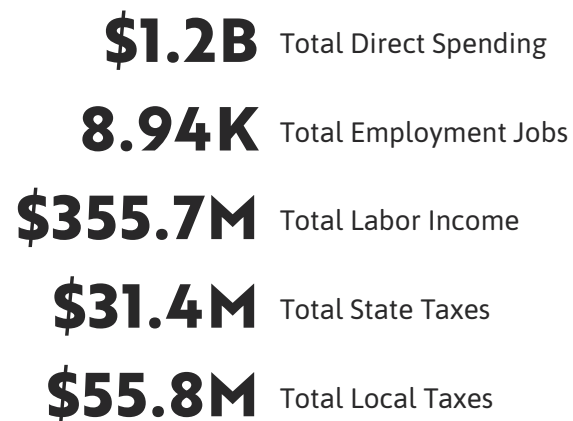
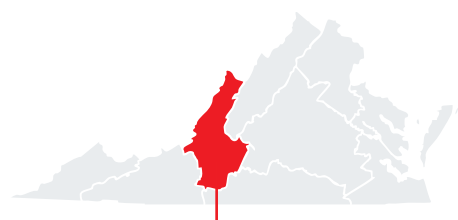
Although the region is remote and access can be challenging, today's travelers are increasingly seeking off-the-beaten-path destinations that deliver authenticity alongside a comfortable, high-quality experience. To fully capitalize on this demand, a strong regional mindset must be cultivated at the local level, supported by coordinated leadership from VTC. Enhanced signage and wayfinding will be critical, particularly given the region's heavy reliance on drive-market visitation. A unified effort is needed to attract distinctive lodging options and complementary dining, beverage, and retail offerings so that growth in visitation and overall competitiveness can benefit. Moving forward, strengthening tourism and community infrastructure, including workforce development initiatives, especially in areas experiencing population decline, will be essential to supporting larger future investments and sustaining long-term regional success.

Virginia Mountains

STATE OF THE REGION

The Virginia Mountains Region is comprised of eight (8) counties including Alleghany, Bath, Bedford, Botetourt, Craig, Franklin, Highland, and Roanoke and the independent cities of Covington, Roanoke, and Salem.

The Virginia Mountains Region, stretching along the western edge of the Commonwealth, is defined by the Blue Ridge and Allegheny Mountain ranges and the Shenandoah Valley foothills. This area is characterized by its natural beauty, small historic towns, and abundant outdoor recreation opportunities, making it one of Virginia's most scenic destinations. The area's appeal lies in its authenticity, scenic landscapes, and ability to attract visitors seeking experience-rich escapes at a slower pace.



Based on the 2024 economic impact numbers prepared by VTC, the Virginia Mountains Region generated the above impacts, accounting for three (3) percent of the statewide total.

The Virginia Mountains tourism economy is growing steadily and balanced across key sectors, with food and beverage and lodging presenting the highest visitor spending by category. Currently, tourism is highly concentrated in the region to Roanoke Valley but supplemented by niche destinations like Bath and Bedford.

Based on Hunden's Pillars of Place assessment and feedback accumulated from extensive stakeholder engagement, which included regional focus groups, industry-represented steering committee, individual interviews, and a region-specific survey, a SWOT analysis was prepared for the region.

STRENGTHS

The Virginia Mountains Region is distinguished by its scenic landscapes, authentic cultural identity, and nationally recognized hospitality anchors, which together create a balanced and resilient visitor economy. The region's greatest strength lies in its outdoor recreation assets, which position it as a premier destination for adventure and nature-based travel. Complementing the natural advantages are landmark hotels and resorts and arts and culture assets, which align with the identified core lures.

Recreation & Natural Environment

The Virginia Mountains are anchored by nationally significant outdoor recreation assets such as the Blue Ridge Parkway, Appalachian Trail, George Washington and Jefferson National Forests, Carvins Cove, and Smith Mountain Lake. These attractions drive recreation spending and make the region a premier destination for hiking, biking, paddling, fishing, and scenic touring. The abundance of trails, water resources, and mountain landscapes gives the region its most distinctive competitive edge.

Hotels & Hospitality

Virginia Mountains Region is home to iconic hospitality properties like the Omni Homestead Resort and The Hotel Roanoke & Conference Center that elevate the region's lodging profile and attract higher-spending visitors. In 2024, lodging accounted for nearly \$270 million in visitor spending (a 24-percent share), with hospitality driving both overnight visitation and major event hosting.

Arts & Culture

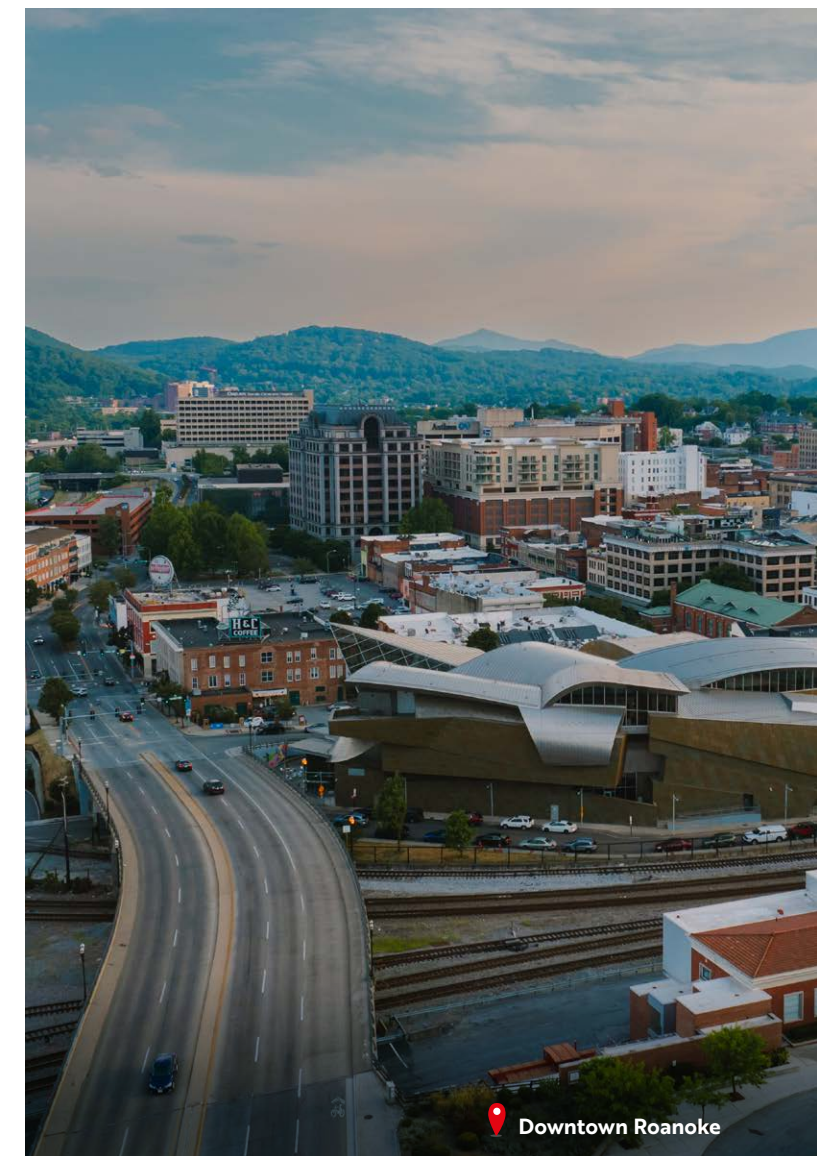
Virginia Mountain's cultural depth is anchored by unique attractions such as the National D-Day Memorial, Taubman Museum of Art, The Harvester Performance Center, and the Harrison Museum of African American Culture, which are highly visited in the region. Coupled with a strong urban arts scene in Roanoke and Salem, Appalachian music traditions, and historic downtowns, the cultural and heritage sites diversify the visitor economy and create year-round tourism appeal.

WEAKNESSES

Despite being rich in natural, cultural, and hospitality assets, the Virginia Mountains Region faces persistent challenges that limit the ability to fully compete with peer destinations. The region's most pressing weakness is its shortage of lodging variety, particularly outside Roanoke and Bath County, which reduces its capacity to capture overnight stays and host larger events. Tourism in the region is unevenly distributed; Roanoke serves as a dominant hub while many rural counties remain underdeveloped and could benefit from greater destination promotion and visitor awareness of their strengths. Accessibility to some of the region's most valued assets remains a key challenge to unlock full visitor potential.



Mill Mountain Overlook



Downtown Roanoke

Virginia Mountains

OPPORTUNITIES

The Virginia Mountains Region has significant opportunities to elevate its brand and expand tourism impact by building on its strongest assets while addressing persistent gaps. While the region possesses nationally recognized natural and cultural assets, its tourism economy is constrained by gaps in lodging supply, visitor infrastructure, and regional visibility. While the region's assets and experiences provide authentic draws for visitors, the region would benefit from improvements in the scale and connectivity needed to consistently generate multi-day stays and repeat visitation. Based on these current gaps and the strengths identified in the Pillars of Place analysis, opportunities exist across several pillars that elevate the region's competitiveness.

Recreation & Natural Environment

The Virginia Mountains have the ability to elevate their position as an outdoor destination by expanding visitor-ready recreation infrastructure. New trailheads, river access points, signage, and wayfinding can make assets like the Blue Ridge Parkway, Appalachian Trail, and Smith Mountain Lake, Jackson River, James River, and the emerging Roanoke River Blueway and Greenway systems more accessible and visitor friendly. These waterways represent some of the region's strongest untapped recreation opportunities, offering paddling, fishing, and water-based trail experiences that can expand the region's outdoor appeal and strengthen connectivity between communities. Leveraging existing regional trail connectivity plans to further link towns, outdoor gateways, and cultural assets, that create a bundled itinerary to encourage multi-day visitation. Beyond infrastructure, opportunities exist to develop signature adventure experiences that can rival competitors' anchor draws.

Attractions & Gaming

The Virginia Mountains can strengthen year-round visitation by diversifying its mix of family-friendly and experiential attractions. Opportunities exist to recruit new

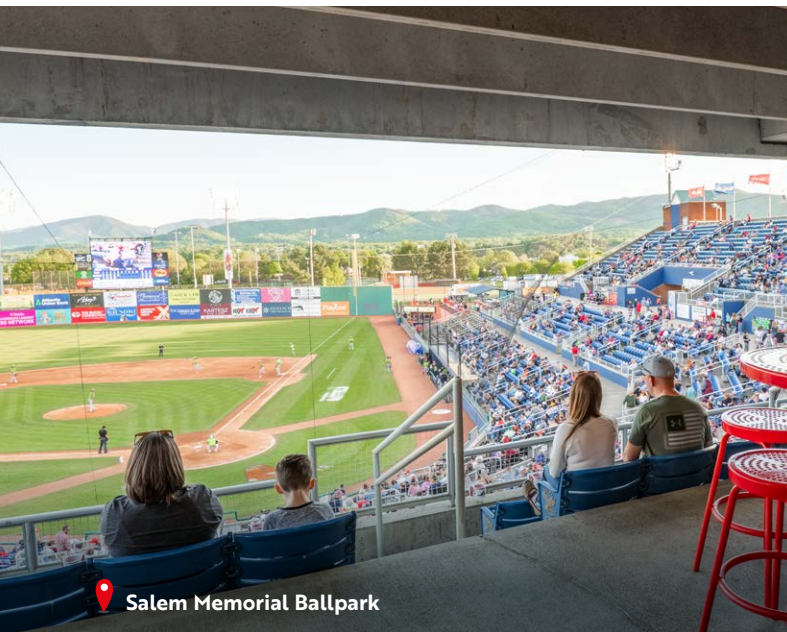
product development and operators that appeal to those demographics such as interactive museums, science and discovery centers, or family adventure parks as examples to appeal to a wide visitor base. There is potential to explore destination-scale entertainment or resort complexes, such as indoor water parks or mixed-use adventure resorts, which could provide large-scale visitation anchors not currently present in the region.

Hotels & Hospitality

Hospitality development presents one of the region's clearest opportunities. Outside Roanoke and Bath County, there are significant lodging gaps that limit overnight stays and event hosting. New boutique hotels in historic downtowns could leverage adaptive reuse and historic tax credits to bring authentic properties online. Expanding authentic lodging such as cabins, eco-lodges, and glamping near natural assets would attract outdoor and experiential travelers. The region also has potential for a new destination resort modeled on the impact of The Omni Homestead, bringing scale and luxury into underserved areas. Together, these hospitality products would diversify the lodging portfolio, balance urban and rural demand, and allow the region to compete more effectively for multi-day tourism.

THREATS

While the Virginia Mountains Region is asset-rich, several external threats could undermine its long-term competitiveness. Peer destinations such as the Smoky Mountains in Tennessee and North Carolina, Asheville, and West Virginia's Greenbrier Valley have stronger national visibility and larger-scale hospitality or attraction investments, drawing market share away from Virginia. The area's heavy reliance on Roanoke City as the economic hub creates vulnerability, as downturns or stagnation in that market could disproportionately affect the region. The region's threats highlight the urgency of investing in product development and regional collaboration to maintain and grow the Virginia Mountains' share of the tourism market.

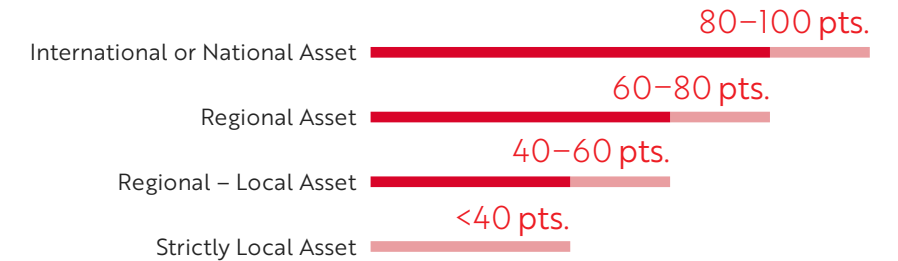


Salem Memorial Ballpark

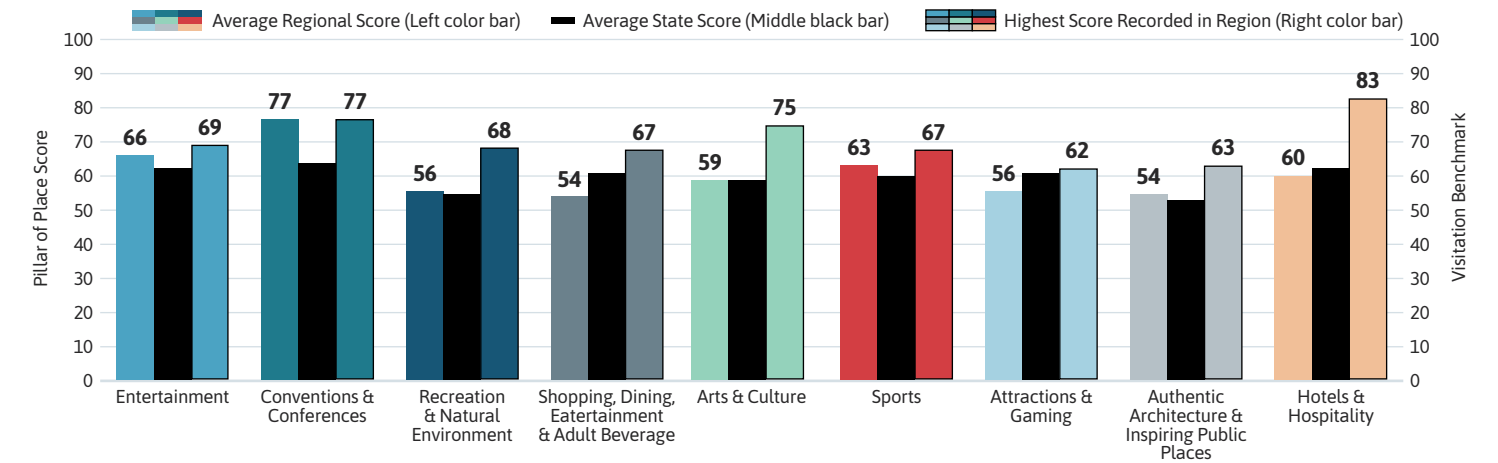
PILLARS OF PLACE – REGIONAL ASSET PERFORMANCE

VTC worked with stakeholders across the state in each region to identify relevant POIs for the tourism experience. Hunden scored and ranked the regional POIs as provided by VTC to analyze the regional performance of assets versus the average performance of assets across the state.

Assets were scored on a scale between 0 and 100 by a total of 20 different metrics. The scoring of assets was categorized in the following tiers shown on the right, while the regional pillar scores are shown in the table below:

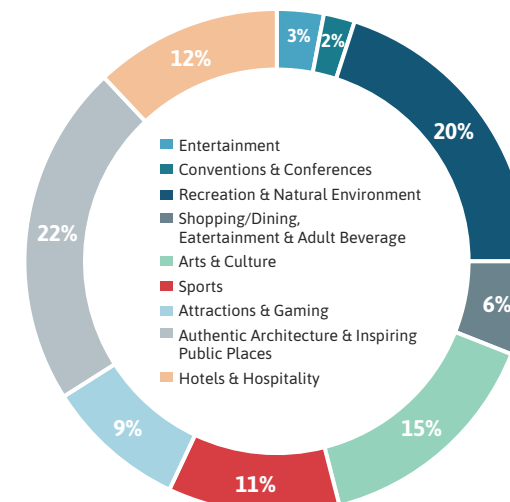


Pillars of Place Assessment | Virginia Mountains



The following graphic details the number of POIs within each Pillar of Place within the region.

Pillars of Place Assessment | Total POIs by Pillar



The Pillars of Place analysis, the number of POIs within each Pillar, stakeholder feedback, and the region's current and future target audience were considered when identifying tactical recommendations for each region. Assets were individually assessed based on offerings and current effectiveness in attracting national and regional visitation to identify gaps within each Pillar. Based on the Pillars of Place assessment, the Virginia Mountains Region demonstrates its strongest concentration of assets in the Recreation & Natural Environment, Authentic Architecture & Inspiring Public Places, and Arts & Culture Pillars. Hunden identified tactical recommendations for specific Pillars to raise the regional Pillar score with assets capable of attracting national and regional visitation.

Virginia Mountains demonstrates consistent regional and local draw across all the Pillars. Although some Pillar categories score lower than the state average overall, the maximum score reflects the strength of high-quality assets and the scoring in national and regional levels. This showcases the opportunity to continue to promote existing product as a vital contributor to the tourism economy.

Virginia Mountains

TARGET AUDIENCE PROFILES

The target audience analysis for Virginia Mountains was developed using a sample of the region’s top-performing assets across the Pillars to understand the current visitor types and identify audiences most aligned with the region’s offerings to leverage for future growth. The audience composition across Virginia Mountains reveals a visitor base that is defined by older, long-settled households, financially secure couples, and retirees seeking peaceful, nature-oriented travel experiences. The audience composition across Virginia Mountains reveals a visitor base that is demographically distinct from other regions of the Commonwealth — defined by older, long-settled households, financially secure couples, and retirees seeking peaceful, nature-oriented travel experiences. Across premier destinations, which include outdoor recreation hubs, cultural sites, hospitality anchors, and walkable historic downtowns, the three dominant segments in the Virginia Mountains are Autumn Years, Booming with Confidence, and Golden Year Guardians.

Together, these audiences illustrate the region’s ability to attract travelers who value scenic beauty, stability, heritage, and low-stress recreation, while also demonstrating growing potential to expand appeal among affluent active couples seeking outdoor adventure, premium lodging, and refined cultural experiences.

J

Autumn Years

The Autumn Years segment represents mature, long-settled couples who lead peaceful, community-centered lives in older single-family homes. Rooted in tradition and financial security, they prefer quiet routines filled with reading, hobbies, and outdoor pastimes. This makes them naturally aligned with the Virginia Mountains’ slow-paced, scenic, and authentically Appalachian lifestyle. Typical heads of household are ages 66 to 75, earning \$50,000 to \$75,000 annually. These visitors are drawn to the region’s small-town character, Blue Ridge Parkway overlooks, accessible trails, lakeside recreation, and heritage-rich main streets like those in Bedford, Fincastle, Rocky Mount, and Clifton Forge.

C

Booming with Confidence

The Booming with Confidence audience includes prosperous, established couples and families in their peak earning years who seek quality, comfort, and curated experiences. Their affluence and lifestyle patterns position them as strong consumers of upscale lodging, elevated dining, premium experiences, and active recreation, making them an increasingly important target for the region’s tourism

Source: Placer.ai Experian Mosaic Segments

Primary in-state feeder markets include Northern Virginia, the Greater Richmond region, and Hampton Roads, which generate strong visitation from mature, financially secure households and retirees seeking scenic, low-stress, and culturally authentic mountain destinations. Adjacent out-of-state feeder markets include the Washington, D.C., metropolitan area and suburban Maryland, the North Carolina Piedmont area (Raleigh-Durham, Greensboro, and Winston-Salem), and eastern Tennessee communities such as Knoxville and the Tri-Cities, where concentrations of affluent empty nesters and near-retirement households are drawn to cooler climates, fall foliage, outdoor recreation, and heritage-rich small towns. Additional secondary feeder markets within a comfortable drive range include South Central Pennsylvania, southern West Virginia, and parts of central Ohio, where long-settled and retiree populations show strong alignment with the Virginia Mountains Region’s scenic landscapes, national parks, historic downtowns, and relaxed pace of travel.

The following regional priorities highlight the opportunities to enhance offerings catered toward the current regional target audience and to attract new target audience groups. Product recommendations were outlined to better position Virginia Mountains against its regional competitors within Virginia’s top competitive statewide markets.

REGIONAL PRIORITIES

Regional priorities for product development and Pillar of Place enhancement were formulated based on regional scoring metrics and stakeholder feedback from in-person workshops, Steering Committee meetings, and virtual Focus Group workshops.

Entertainment

Only a handful of entertainment venues exist in the region. The mid-sized venues of The Harvester Performance Center and Elmwood Park serve regional audiences. Stakeholders identified the need to expand multipurpose performance and entertainment venues, particularly in Roanoke, Salem, and Clifton Forge to host live music, festivals, and cultural events that blend with the region’s food, beverage, and arts assets to sustain year-round visitation.

Conventions & Conferences

The Hotel Roanoke & Conference Center serves as the primary convention anchor, but regional connectivity and meeting capacity in rural areas could benefit from improvement. Priorities include expanding conference and meeting space tied to new full-service hotels, targeting mid-sized association meetings, academic conferences, and niche events that align with the region’s higher education institutions and heritage identity.

Recreation & Natural Environment

The Virginia Mountains are defined by their concentration of recreation assets, from the Blue Ridge Parkway and Appalachian Trail to Smith Mountain Lake, Carvins Cove, and signature destinations such as Explore Park. The region is also home to Virginia’s Blue Ridge Silver-Level Ride Center®, one of IMBA’s designated mountain biking centers of this caliber in the eastern United States, establishing the Roanoke Valley as America’s East Coast Mountain Biking Capital and further leveraging the opportunity for existing product promotion. Roanoke’s position as the largest city on the Appalachian Trail further elevates its national visibility, with the Triple Crown of Virginia (i.e., Dragon’s Tooth, McAfee Knob, and Tinker Cliffs). Investment should focus on enhancing river and trail infrastructure, building regional connectivity, and expanding authentic outdoor lodging such as cabins and glamping, creating multi-day itineraries that extend visitation into rural communities.

Shopping, Dining, Entertainment & Adult Beverage

Food and beverage is the region’s largest visitor spending category, supported by wineries, breweries, a cidery, and farm-to-table dining. The priority is to create a unified regional culinary and beverage identity that ties together agritourism and craft beverage trails with downtown dining and festivals. This approach will reinforce the region as an Appalachian culinary corridor and extend spending across rural and urban communities alike.

Arts & Culture

With anchors like the Taubman Museum of Art, The Harvester Performance Center, Historic Masonic Theatre, and the National D-Day Memorial, arts and culture are well-established but not fully leveraged. Expanding regional festivals, touring performances, and cultural packaging can position arts as a connector across food, heritage, and entertainment, while inclusive storytelling around Civil Rights, Appalachian heritage, and local traditions will broaden market appeal.

Sports

The region’s sports economy is supported by university venues, local facilities, and a select number of facilities like Salem, capable of hosting regional tournaments (e.g., Salem). There is an opportunity to further grow sports tourism off of this foundation. The region could benefit from additional large-scale tournament complexes. Stakeholders ranked investment in indoor and outdoor youth and collegiate tournament facilities and lodging near sports complexes as high priorities to better leverage existing assets, ensuring the region can host multi-day events without relying on dispersed venues across counties.

Attractions & Gaming

Attractions such as The Omni Homestead, Rosie’s Gaming Emporium, and the Franklin County Speedway provide important anchors, but the region could benefit from more family-friendly and interactive attractions. Opportunities include developing experiential attractions and expanding event-driven destinations. Long-term exploration of destination-scale entertainment complexes could diversify the tourism mix.

Authentic Architecture & Inspiring Public Places

The Virginia Mountains are home to authentic, walkable downtowns such as those in Bedford, Roanoke, Clifton Forge, and Salem. Continued investment in historic preservation, riverfront revitalization, and mixed-use development will strengthen these districts as tourism anchors. Priorities include improving walkability, placemaking, and event activation to create compelling experiences in small towns and city centers alike.

Hotels & Hospitality

Hospitality remains a major gap outside Bath County and Roanoke. Priorities include developing boutique hotels in historic towns, expanding authentic rural lodging (cabins, inns, and glamping near natural assets), and pursuing a new destination resort to replicate the outsized impact of the Omni Homestead. Recruiting investors and operators through market briefs and proactive outreach should be central to filling these gaps.

Virginia Mountains

COMPETITORS

Kentucky, Pennsylvania, North Carolina, Tennessee, and West Virginia were identified as Virginia’s core competitive set. Within these states, Virginia Mountains’ most relevant competitors by region include:

Pennsylvania: Laurel Highlands

Pennsylvania’s Laurel Highlands region is a close peer to the Virginia Mountains, with its mix of mountain landscapes, Frank Lloyd Wright’s architectural landmarks, outdoor adventure, and historic sites. Like the Virginia Mountains, it attracts families, outdoor travelers, and cultural visitors seeking authentic Appalachian experiences. The Laurel Highlands benefit from strong regional branding and proximity to Pittsburgh, while the Virginia Mountains have greater cultural anchors such as The Harvester Performance Center and D-Day Memorial, and stronger hospitality icons in The Omni Homestead and The Hotel Roanoke & Conference Center. Both regions compete in the market for drive-in visitation and travelers, heritage tourists, and multigenerational families looking for affordable, outdoors-centered getaways.

North Carolina: Asheville & Blue Ridge Mountains

Asheville and its surrounding Blue Ridge region represent one of the Virginia Mountains’ most direct competitors. Both are mountain-based destinations with strong outdoor recreation, craft beverage, and cultural offerings. Asheville has a national reputation for its arts scene, breweries, and eclectic downtown, giving it higher visibility in national markets. The Virginia Mountains, while less widely branded, compete with comparable assets in outdoor recreation, authentic small towns, and food and beverage growth. The Virginia Mountains’ differentiation lies in its landmark resorts, heritage sites, and Civil War/Civil Rights history, while Asheville’s strength is its urban brand identity and national marketing reach.

Tennessee: Smoky Mountains

Gatlinburg, Pigeon Forge, Knoxville

The Smoky Mountains are perhaps the most significant competitor, with their scale of visitation, family attractions, and entertainment infrastructure. Gatlinburg and Pigeon Forge combine mountain recreation with large-scale attractions like Dollywood, creating a powerful family tourism draw. By comparison, the Virginia Mountains emphasize a more authentic, less commercialized experience, rooted in Appalachian culture, outdoor adventure, and boutique lodging. While the Smokies dominate in sheer visitor volume and brand awareness, the Virginia Mountains can position themselves as the “authentic alternative” — appealing to travelers seeking cultural depth, heritage storytelling, and nature-based experiences.

Kentucky: Eastern Kentucky

Red River Gorge & Appalachian Region

Eastern Kentucky’s Red River Gorge and Daniel Boone National Forest compete directly with the Virginia Mountains through their mountain landscapes, outdoor adventure, and Appalachian cultural traditions. Known for hiking, rock climbing, and rustic lodging, the region attracts visitors motivated by authentic nature-based experiences, similar to those found along the Blue Ridge Parkway, Appalachian Trail, and Smith Mountain Lake. Cultural hubs like Berea, celebrated for Appalachian crafts and traditions, mirror the Virginia Mountains’ emphasis on artisan heritage, live music, and small-town authenticity. Both regions appeal to outdoor enthusiasts, heritage travelers, and families seeking immersive Appalachian experiences, though the Virginia Mountains differentiate with nationally recognized hospitality anchors like the Omni Homestead and The Hotel Roanoke & Conference Center.

West Virginia: Greenbrier Valley

The Greenbrier Valley and its iconic Greenbrier Resort compete directly with Virginia Mountains’ resort and wellness offerings. Both regions share mountain landscapes, outdoor recreation, and historic downtowns. The Greenbrier’s global name recognition sets a high bar for destination hospitality, while the Virginia Mountains counter with a broader mix of cultural attractions, outdoor trails, and multiple hospitality anchors including The Omni Homestead and The Hotel Roanoke & Conference Center. Both appeal to affluent travelers, couples, and wellness-oriented visitors, but the Virginia Mountains have the advantage of greater scale and diversity of experiences across a wider geographic footprint.



Virginia Museum of Transportation

COMPETITOR SUMMARY

The Virginia Mountains Region competes with a diverse set of Appalachian and mountain-based destinations, including Eastern Kentucky, Pennsylvania’s Laurel Highlands, Asheville and the Blue Ridge Mountains in North Carolina, Tennessee’s Smoky Mountains, and West Virginia’s Greenbrier Valley. These competitors reinforce the importance of clear positioning, clustered product development, and strong regional branding. Peer destinations such as Asheville and the Smoky Mountains demonstrate how concentrated entertainment districts, signature attractions, and national marketing can drive scale and visibility, while regions like the Laurel Highlands and Greenbrier Valley highlight the value of iconic hospitality anchors and cohesive storytelling around culture, architecture, and wellness. The Virginia Mountains should seek to replicate competitors’ success in packaging experiences, elevating brand recognition, and clustering complementary assets, while differentiating by emphasizing its authentic Appalachian culture, landmark resorts, heritage sites and outdoor recreation. To remain competitive, the region must align product development and branding strategies across key pillars to reinforce its role as an authentic, multi-day mountain destination rather than a single-attraction or single-community experience.



Carvins Cove Natural Reserve



Virginia Mountains

TACTICAL RECOMMENDATIONS

Based on the Pillars of Place analysis and stakeholder feedback, Hunden recommends an emphasis on the following Pillars of Place for the enhancement of tourism in Virginia Mountains.

Recreation & Natural Environment

Outdoor recreation scored as one of the region's strongest differentiators, with assets consistently highlighted by both data and stakeholders. However, there are opportunities to further strengthen one of the region's greatest assets.

- Improve trail connectivity, wayfinding, and signage across key assets, including Blue Ridge Parkway, Appalachian Trail, Carvins Cove, and Smith Mountain Lake, to better link outdoor recreation areas with nearby towns, lodging, and food and beverage offerings.
- Prioritize visitor-facing infrastructure that enhances ease of navigation and supports multi-day trip planning.
- Incentivize development of authentic recreation-oriented lodging products such as cabins, eco-lodges, and glamping near natural gateways. These products directly address a documented gap in overnight accommodations for outdoor recreation travelers and support longer lengths of stay.
- Conduct feasibility studies for signature adventure developments (e.g., mountain recreation hubs, riverwalks, or adventure parks) that can serve as destination anchors. These assets should be designed to compete with peer destinations such as the Smoky Mountains while remaining authentic to the region's landscape and Appalachian character.

Although outdoor recreation is one of the region's strongest differentiators, inconsistent infrastructure and connectivity block the region's full potential. Strategic investment in access, lodging, and signature experiences will allow the Virginia Mountains to better capitalize on demand and function as a cohesive outdoor destination.

Hotels & Hospitality

Lodging was identified as the No. 1 gap in the region by stakeholders, with shortages evident in both rural counties and around outdoor and sports venues. While The Omni Homestead and The Hotel Roanoke & Conference Center serve as premier anchors, stakeholders stressed that much of the region remains underserved, and would benefit from more ability to host larger events or convert day-trippers into overnight visitors. The region should focus on product development in three tiers:

1. Expand boutique and mid-scale hotels in smaller towns using adaptive reuse and historic tax credits to bring new life to downtown buildings.
2. Support development of authentic lodging such as cabins, inns, and glamping in rural and recreation-adjacent communities, directly addressing demand for unique accommodations.
3. Explore new resort-scale investments with a key count ranging from 150 to 250 rooms modeled after Omni Homestead, which demonstrates how one property can significantly elevate and lift local tourism impacts. In Roanoke, expanding full-service hotel and meeting space capacity will reinforce its role as the regional hub.

Stakeholders consistently identified lodging as the region's most significant gap, hampering its ability to convert day visitors into overnight guests and host larger events. Proactive recruitment of hotel developers and operators supported by clear market data and positioning materials will be essential to unlocking the Virginia Mountains' underbuilt, high-potential lodging market.

Attractions & Gaming | Entertainment

The Virginia Mountains Region has a strong base of cultural and outdoor anchors, and the addition of family friendly, interactive, and mid-sized attractions can diversify visitation and extend overnight stays.

- Develop interactive, family-friendly, and experiential attractions such as adventure parks, interactive museums, or discovery centers that complement the region's outdoor and cultural assets. These attractions should be designed to serve both residents and visitors while encouraging longer stays.
- Focus on attractions that are rooted in Appalachian identity and natural landscapes rather than large-scale, branded concepts to reinforce the region's authenticity and sense of place.
- Expand live music and event venues in Roanoke and Salem to strengthen year-round visitation and diversify the region's entertainment offerings. Target capacities of 1,500 – 4,000 are designed to support flexibility in events.

While the Virginia Mountains benefit from strong cultural and outdoor anchors, a critical mass of mid-sized, experiential attractions is needed to extend stays and broaden appeal. Strategic development of authentic, place-based entertainment assets will allow the region to compete more effectively with destinations such as Asheville and the Smoky Mountains.

CONCLUSION

The Virginia Mountains Region is defined by an exceptional concentration of natural beauty, outdoor recreation assets, and Appalachian heritage, yet these strengths remain under-leveraged from a tourism and economic impact perspective. While the region consistently attracts day visitors drawn to scenic landscapes and cultural sites, gaps in visitor-ready infrastructure and diverse lodging affect its ability to function as a cohesive, multi-day destination. Addressing these gaps is essential to translating the region's existing appeal into sustained visitation growth and broader economic benefit for local communities.

Strategic investment in authentic lodging, improved access and wayfinding, and experience-driven placemaking will allow the Virginia Mountains to fully capitalize on its outdoor and cultural assets. Expanding boutique, mid-scale, and resort-style accommodations will convert day trips into overnight stays, while curated cultural and culinary programming will differentiate the region from peer mountain destinations. Through coordinated development and thoughtful packaging of experiences, the Virginia Mountains Region is well positioned to strengthen its tourism ecosystem while preserving the character and heritage that make it distinctive.



APPENDIX

Steering Committee

NAME	ORGANIZATION	REGION
Becky McDonough	Hopewell/Prince George Chamber of Commerce	Central Virginia
Courtney Cacatian	Charlottesville/Albemarle Convention & Visitors Bureau	Central Virginia
Molly Kinahan	Prince Edward County Tourism	Central Virginia
Maureen Kelley	Nelson County Economic Development & Tourism	Central Virginia
Joanne Williams	Petersburg City	Central Virginia
Katherine O'Donnell	Richmond Region Tourism	Central Virginia
Stacey English	Dinwiddie County	Central Virginia
Marjette Upshur	Lynchburg City	Central Virginia
Roxanne Salerno	Powhatan County	Central Virginia
Tracey Gardner	Madison County	Central Virginia
Alan Yost	Greene County	Central Virginia
Julie Perry	Orange County Economic Development and Tourism	Central Virginia
Brittany Niemeyer	Nelson County Economic Development & Tourism	Central Virginia
Elizabeth Blackney	The Cook Foundation	Chesapeake Bay
Karen Daly	Stratford Hall	Chesapeake Bay
Susan Cockrell	Virginia's River Realm	Chesapeake Bay
Trent Funkhouser	Middlesex County Economic Development Authority (EDA)	Chesapeake Bay
Erin Lazar	King & Queen	Chesapeake Bay
Lisa Hull	Northern Neck Tourism Commission	Chesapeake Bay
Woodie Walker	Essex County EDA	Chesapeake Bay
Melissa Anderson	Town of West Point	Chesapeake Bay
Lewis Lawrence	Middle Peninsula Planning District Commission	Chesapeake Bay
Edward Villafane	The Tides Inn	Chesapeake Bay
Robert Sabbatini	Eastern Shore of Virginia Tourism Commission	Eastern Shore
Clarice MacGarvey	Town of Exmore	Eastern Shore
Joanne Moore	Chincoteague Chamber of Commerce & Visitor Center	Eastern Shore
John Hozey	Town of Cape Charles	Eastern Shore
Matt Spuck	Town of Onancock	Eastern Shore
Billy Joe Tarr	Accomack County, County Board of Supervisors	Eastern Shore
John Coker	Northampton County Board of Supervisors	Eastern Shore
Tammy Holloway	Town of Cape Charles Town Council	Eastern Shore
Denise Bowden	Town of Chincoteague Island Town Council	Eastern Shore
Karen Zamorski	Cape Charles Main Street	Eastern Shore
Kevin Lembke	Busch Gardens Williamsburg	Hampton Roads
Cliff Fleet	Colonial Williamsburg Foundation	Hampton Roads
Christy Coleman	Jamestown-Yorktown Foundation	Hampton Roads
Mary Fugere	Hampton Convention & Visitor Bureau	Hampton Roads
Judy Winslow	Smithfield and Isle of Wight Convention & Visitors Bureau	Hampton Roads
Edward Harris	Visit Williamsburg	Hampton Roads
Sarah Hughes	Visit Norfolk	Hampton Roads

Steering Committee

NAME	ORGANIZATION	REGION
Scott Baker	Arlington Convention and Visitors Service	Northern Virginia
Emily Cassell	Arlington Convention and Visitors Service	Northern Virginia
Barry Biggar	Visit Fairfax	Northern Virginia
Beth Erickson	Visit Loudoun	Northern Virginia
Todd OLeary	Visit Alexandria	Northern Virginia
Kevin Costello	Prince William County Office of Tourism	Northern Virginia
Paige Read	Town of Culpeper	Northern Virginia
Bonnie Jewell	Rappahannock County	Northern Virginia
Laurie Smith	Businesses of Rappahannock, Rappahannock County Farm Crawl	Northern Virginia
Laura Torpy	Fauquier County Economic Development	Northern Virginia
Justin Kerns	Winchester - Frederick County CVB	Shenandoah Valley
Michelle Ridings	Clarke County	Shenandoah Valley
Elizabeth (Lizi) Lewis	Discover Front Royal	Shenandoah Valley
Brenda Black	Shenandoah County Tourism & Economic Development	Shenandoah Valley
Jennifer Bell	Harrisonburg Tourism and Visitor Services	Shenandoah Valley
Joshua Gooden	Visit Rockingham	Shenandoah Valley
Sheryl Wagner	Lexington and the Rockbridge Area Tourism	Shenandoah Valley
Stephanie Duffy	Waynesboro Economic Development & Tourism	Shenandoah Valley
Samantha Johnson	Staunton Convention & Visitors Bureau	Shenandoah Valley
Rebekah Castle	Augusta County Economic Development	Shenandoah Valley
Nina Fox	Page Valley	Shenandoah Valley
Connie Nyholm	Virginia International Raceway	Southern Virginia
Sandra Tanner	South Hill Chamber of Commerce	Southern Virginia
Tara Tuck	Town of Clarksville	Southern Virginia
Sarah Hodges	Martinsville-Henry County	Southern Virginia
Tina Morgan	Mecklenburg County Tourism Office	Southern Virginia
Lisa Meriwether	Danville City, Pittsylvania Co: SoSi Director	Southern Virginia
Dixie Walker Daniel	Brunswick County	Southern Virginia
Shanetta Beck	Emporia City	Southern Virginia
Tracy Gee	Lunenburg County	Southern Virginia
Carl Epsy	Town of Halifax	Southern Virginia
LaTonya Hamilton	County of Halifax + City of South Boston	Southern Virginia

NAME	ORGANIZATION	REGION
Leah Ross	Birthplace of Country Music	Blue Ridge Highlands
Kim Davis	SWVA Cultural Heritage Foundation	Blue Ridge Highlands
Matt Bolas	Explore Bristol	Blue Ridge Highlands
Patti Price Love	City of Galax	Blue Ridge Highlands
Cora Gnegy	Giles County	Blue Ridge Highlands
Tracy Cornett	Grayson County	Blue Ridge Highlands
Karen Hester	The Southern Churn, Cranberry Lane, & Unwind Vacation Rentals	Blue Ridge Highlands
Erika Tolbert	Pulaski County	Blue Ridge Highlands
Amanda Livingston	Smyth County	Blue Ridge Highlands
Tyler Hughes	The Crooked Road	Blue Ridge Highlands
Will Payne	Squabble State Hard Cider & Spirits	Blue Ridge Highlands
Tyler Hughes	The Crooked Road	Heart of Appalachia
Steve Pike	Spearhead Trails	Heart of Appalachia
Jeff Hess	Heart of Appalachia Tourist Information Center	Heart of Appalachia
Brittany Robertston	Scott County Tourism	Heart of Appalachia
Katie Dunn	City of Norton	Heart of Appalachia
AJ Robinson	Tazewell County Tourism	Heart of Appalachia
Matt Fields	Buchanan County Tourism	Heart of Appalachia
Rita Surratt	Dickenson County Visitor Center/Chamber	Heart of Appalachia
Natalie Chapman	Wise County Tourism	Heart of Appalachia
Josh Taylor	Alleghany Highlands Chamber of Commerce & Tourism	Virginia Mountains
Mark Shore	Visit Bath County	Virginia Mountains
Nicole Johnson	Destination Bedford County	Virginia Mountains
Diane Givens	Craig County	Virginia Mountains
Chris Swecker	Highland County Chamber of Commerce	Virginia Mountains
Carey Harveycutter	City of Salem Tourism	Virginia Mountains
Landon Howard	Visit Virginia's Blue Ridge	Virginia Mountains
Andy Bruns	Visit Smith Mountain Lake	Virginia Mountains
Kevin Tosh	Franklin County Tourism	Virginia Mountains
Daniel Pinard	Town of Rocky Mount	Virginia Mountains

This list is inclusive of steering committee members only, as stated in the stakeholder engagement section on page 8, a more comprehensive list of stakeholders participated in focus groups for each region.

Pillars of Place Definitions

ENTERTAINMENT

Live or programmed venues and events that provide cultural, musical, or recreational experiences and serve as leisure anchors across age groups.

Examples: Live music venues, arcades or family fun centers, commercial performance halls.

SHOPPING, DINING, ENTERTAINMENT & ADULT BEVERAGE

Retail, culinary, and craft beverage offerings that reflect regional identity and generate visitor spending through authentic, social experiences.

Examples: Breweries, wineries, oyster or wine trails, chef-driven food halls, historic downtown retail clusters.

ATTRACTIONS & GAMING

Standalone venues offering interactive, themed, or gaming-based experiences that drive family and group visitation, often ticketed or paid experiences.

Examples: Amusement parks, casinos, aquariums.

CONVENTIONS & CONFERENCES

Purpose-built or adaptable venues that host meetings, trade shows, and civic functions, generating group demand and off-season activity.

Examples: Convention centers, civic centers, event spaces.

ARTS & CULTURE

Institutions, venues, and experiences that preserve and present the region's heritage and creativity through visual, performing, and interpretive mediums.

Examples: Regional art centers & museums, colleges & universities, public sculpture installations.

AUTHENTIC ARCHITECTURE & INSPIRING PUBLIC PLACES

Historic downtowns, waterfronts, and civic spaces that reflect the region's character through distinctive buildings and activated public areas.

Examples: Preserved main street districts, historic courthouses, walkable town squares

RECREATION & NATURAL ENVIRONMENT

Outdoor assets and infrastructure that showcase ecological features and support physical activity and nature-based engagement.

Examples: River access points, trail systems, county, regional, state and national parks.

SPORTS

Facilities supporting youth, amateur, and spectator athletics that contribute to group and family travel.

Examples: Multi-field or court sports complexes, minor league stadiums, tournament-capable related fields and facilities.

HOTELS & HOSPITALITY

Accommodations ranging from boutique inns and campgrounds to full-service hotel and resort properties that serve overnight guests and align with the destination's scale and character.

Examples: Boutique waterfront inns, full-service conference hotels, glamping resorts.



 Floodwall Park

Central Virginia POI by Pillars

POI	PILLAR OF PLACE
Monticello	Arts and Culture
University of Virginia	Arts and Culture
James Madison's Montpelier	Arts and Culture
James Monroe's Highland	Arts and Culture
Children's Museum of Richmond and Science Museum of Virginia	Arts and Culture
Virginia State University	Arts and Culture
Longwood University	Arts and Culture
Virginia Museum of History and Culture	Arts and Culture
Liberty University	Arts and Culture
Petersburg National Battlefield	Arts and Culture
Virginia Commonwealth University	Arts and Culture
Randolph Macon University	Arts and Culture
Wilderness Battlefield	Arts and Culture
The Poe Museum	Arts and Culture
Black History Museum and Cultural Center of Virginia	Arts and Culture
American Civil War Museum - Historic Tredegar	Arts and Culture
Virginia Holocaust Museum	Arts and Culture
IX Art Park	Arts and Culture
Keystone Antique Truck & Tractor Museum	Arts and Culture
Lynchburg Museum & Visitor Services and Monument Terrace	Arts and Culture
Ashland Theatre	Arts and Culture
Academy Center of the Arts	Arts and Culture
Hovey Field in Virginia Union University	Arts and Culture
The Cultural Arts Center	Arts and Culture
Virginia Museum of Fine Arts	Arts and Culture
Maggie Walker National Historic Site	Arts and Culture
Railroad Ave Ashland (Train Station, Restaurants, and Museum)	Arts and Culture
Robert Rossa Moton Museum	Arts and Culture
The American Civil War Museum	Arts and Culture
US Army Quartermaster Museum and Army Women's Museum	Arts and Culture
Prince George County Regional Heritage Center	Arts and Culture
Kings Dominion	Attractions and Gaming
Wintergreen Resort	Attractions and Gaming
Lewis Ginter Botanical Garden	Attractions and Gaming
Liberty Mountain Snowflex Centre	Attractions and Gaming
Riverfront Canal Cruises	Attractions and Gaming
Carter Mountain Orchard and Country	Attractions and Gaming
Richlands Creamery and Dairy Farm	Attractions and Gaming
Metro Richmond Zoo	Attractions and Gaming
Downtown Richmond	Authentic Architecture and Public Space

POI	PILLAR OF PLACE
Downtown Mall	Authentic Architecture and Public Space
Maymont	Authentic Architecture and Public Space
Virginia Capitol District	Authentic Architecture and Public Space
Downtown Petersburg	Authentic Architecture and Public Space
Richmond International Airport	Authentic Architecture and Public Space
Broad Street Arts District / Jackson Ward (Broad St from Belvidere to 3rd)	Authentic Architecture and Public Space
Carytown (Stretching from S Nansemond St to S Arthur Ashe Blvd)	Authentic Architecture and Public Space
Downtown Farmville	Authentic Architecture and Public Space
Main Street Station	Authentic Architecture and Public Space
Cold Harbor Battlefield Visitor Center	Authentic Architecture and Public Space
Ancarrow's Landing & Richmond Slave Trail	Authentic Architecture and Public Space
Appomattox Main Street	Authentic Architecture and Public Space
The Fan District (W Main Street from Harrison to Meadow St)	Authentic Architecture and Public Space
Charlottesville Airport	Authentic Architecture and Public Space
Lynchburg Regional Airport	Authentic Architecture and Public Space
Lynchburg Main Street	Authentic Architecture and Public Space
Percivals Island Natural Area	Authentic Architecture and Public Space
Main Street Orange	Authentic Architecture and Public Space
Belle Isle	Authentic Architecture and Public Space
Madison Main Street	Authentic Architecture and Public Space
Blackstone Main Street	Authentic Architecture and Public Space
Hopewell Downtown	Authentic Architecture and Public Space
Ivy Creek Natural Area	Authentic Architecture and Public Space
Charlottesville Train Station	Authentic Architecture and Public Space
Downtown Crozet	Authentic Architecture and Public Space
Gordonsville Main Street (Including Civil War Medical Museum and Barbeque Exchange)	Authentic Architecture and Public Space
Rockfish Gap Tourist Center	Authentic Architecture and Public Space
Stanardsville Main Street	Authentic Architecture and Public Space
Valley Street Scottsville	Authentic Architecture and Public Space
Lynchburg Amtrak Station	Authentic Architecture and Public Space
Farmville Train Station	Authentic Architecture and Public Space
Waverly Main Street	Authentic Architecture and Public Space
Altavista Main Street	Authentic Architecture and Public Space
Goochland Courthouse Area	Authentic Architecture and Public Space
South River Falls Trail	Authentic Architecture and Public Space
Downtown Amelia Courthouse	Authentic Architecture and Public Space
Amherst Main Street	Authentic Architecture and Public Space
Hopewell City Marina	Authentic Architecture and Public Space
Powhatan Courthouse District	Authentic Architecture and Public Space
Dillwyn Main Street	Authentic Architecture and Public Space

Central Virginia POI by Pillars

POI	PILLAR OF PLACE
Petersburg Visitors Center	Authentic Architecture and Public Space
Louisa Main Street	Authentic Architecture and Public Space
Ting Pavilion	Authentic Architecture and Public Space
Hull Street Corridor	Authentic Architecture and Public Space
Petersburg Amtrak Station	Authentic Architecture and Public Space
Petersburg Visitors Center	Authentic Architecture and Public Space
Lake Monticello Marina	Authentic Architecture and Public Space
Downtown Mineral	Authentic Architecture and Public Space
Greene County Visitor Center	Authentic Architecture and Public Space
Lovingston Main Street	Authentic Architecture and Public Space
Greater Richmond Convention Center	Conventions and Conferences
Virginia Crossings Hotel & Conference Center	Conventions and Conferences
Allianz Amphitheater	Entertainment
The Meadow Event Park	Entertainment
Paramount Theater	Entertainment
Beacon Theater	Entertainment
The Jefferson Hotel	Hotels and Hospitality
Keswick Hall	Hotels and Hospitality
Graduate Richmond	Hotels and Hospitality
Graduate Charlottesville	Hotels and Hospitality
RIC Airport Hotels (Hampton Inn, Double Tree, Hilton Garden Inn, Holiday Inn)	Hotels and Hospitality
Virginian Hotel	Hotels and Hospitality
Inn at Willow Grove	Hotels and Hospitality
Hotel Petersburg	Hotels and Hospitality
Bluegreen Vacations Shenandoah Crossing	Hotels and Hospitality
Weyanoke Hotel	Hotels and Hospitality
Richmond Southside Hotels (Candlewood Suites, Best Western, Hampton Inn, Red Roof Inn)	Hotels and Hospitality
The Clifton	Hotels and Hospitality
Petersburg Hotels at Fort Lee (Holiday Inn Express, Comfort Inn, Hampton Inn)	Hotels and Hospitality
Graves Mountain Lodge	Hotels and Hospitality
Craddock Terry Hotel	Hotels and Hospitality
Hyatt Place Richmond/Arboretum	Hotels and Hospitality
Hotels at Cox Road (Hilton Garden Inn, Hyatt Place Innsbrook, Hampton Inn Innsbrook, Comfort Suites)	Hotels and Hospitality
Glen Allen Hotels (Hampton Inn, Courtyard Inn, Spring Hill Suites, Comfort Suites)	Hotels and Hospitality
Chester Hotels (Courtyard, Holiday Inn Express, Homewood Suites)	Hotels and Hospitality
Hotels in Colonial Heights (Holiday Inn, Hampton Inn, Comfort Suites)	Hotels and Hospitality
Lydia Mountain	Hotels and Hospitality
Appomattox Court House National Historic Park	Recreation and Natural Environment

POI	PILLAR OF PLACE
Pocahontas State Park	Recreation and Natural Environment
High Bridge State Park Camp Paradise Entrance	Recreation and Natural Environment
The Park RVA	Recreation and Natural Environment
Stony Point Fashion Park	Recreation and Natural Environment
Great Shiplock Park & Virginia Capital Trail Richmond Trailhead	Recreation and Natural Environment
Sandy River Outdoor Adventure	Recreation and Natural Environment
Bear Creek Lake State Park	Recreation and Natural Environment
Crabtree Falls	Recreation and Natural Environment
Holliday Lake State Park	Recreation and Natural Environment
Henricus Historical Park	Recreation and Natural Environment
Twin Lakes State Park	Recreation and Natural Environment
Sailor's Creek Battlefield State Park	Recreation and Natural Environment
Old Rag Mountain Information Station & Parking	Recreation and Natural Environment
James River State Park	Recreation and Natural Environment
Powhatan State Park	Recreation and Natural Environment
Pamplin Historical Park	Recreation and Natural Environment
Appomattox River Regional Park	Recreation and Natural Environment
Amelia Wildlife Management Area	Recreation and Natural Environment
Whippernock Marina & Campground	Recreation and Natural Environment
Appomattox-Buckingham State Forest	Recreation and Natural Environment
Robious Landing Park	Recreation and Natural Environment
Cumberland State Forest	Recreation and Natural Environment
Hardywood West Creek Brewery	Shopping/Dining, Entertainment and Adult Beverage Experiences
Barboursville Vineyards	Shopping/Dining, Entertainment and Adult Beverage Experiences
Blenheim Vineyards	Shopping/Dining, Entertainment and Adult Beverage Experiences
Scott's Addition	Shopping/Dining, Entertainment and Adult Beverage Experiences
Michie Tavern	Shopping/Dining, Entertainment and Adult Beverage Experiences
Hanover Tavern	Shopping/Dining, Entertainment and Adult Beverage Experiences
Retail Stores At Glen Allen	Shopping/Dining, Entertainment and Adult Beverage Experiences
Trump Winery	Shopping/Dining, Entertainment and Adult Beverage Experiences
Short Pump Town Center	Shopping/Dining, Entertainment and Adult Beverage Experiences
Devils Backbone Brewery	Shopping/Dining, Entertainment and Adult Beverage Experiences
Shockoe Bottom Restaurants	Shopping/Dining, Entertainment and Adult Beverage Experiences
Pippin Hill Farm & Vineyards	Shopping/Dining, Entertainment and Adult Beverage Experiences
Westchester Commons	Shopping/Dining, Entertainment and Adult Beverage Experiences
Woodruffs Café Pie Shop	Shopping/Dining, Entertainment and Adult Beverage Experiences
Virginia Diner	Shopping/Dining, Entertainment and Adult Beverage Experiences
Lickinghole Creek Brewery	Shopping/Dining, Entertainment and Adult Beverage Experiences
King Family Vineyard	Shopping/Dining, Entertainment and Adult Beverage Experiences
Early Mountain Vineyards	Shopping/Dining, Entertainment and Adult Beverage Experiences
Bold Rock Cider	Shopping/Dining, Entertainment and Adult Beverage Experiences

Central Virginia POI by Pillars

POI	PILLAR OF PLACE
Coyote Hole Craft Beverages	Shopping/Dining, Eatertainment and Adult Beverage Experiences
Veritas Vineyards	Shopping/Dining, Eatertainment and Adult Beverage Experiences
Croaker's Spot	Shopping/Dining, Eatertainment and Adult Beverage Experiences
Jefferson Vineyards	Shopping/Dining, Eatertainment and Adult Beverage Experiences
Blue Mountain Brewery	Shopping/Dining, Eatertainment and Adult Beverage Experiences
Afton Mountain Vineyards	Shopping/Dining, Eatertainment and Adult Beverage Experiences
Chesterfield Towne Center	Shopping/Dining, Eatertainment and Adult Beverage Experiences
Stone Mountain Vineyards	Shopping/Dining, Eatertainment and Adult Beverage Experiences
Trapezium Brewing Co	Shopping/Dining, Eatertainment and Adult Beverage Experiences
Virginia Distillery Company	Shopping/Dining, Eatertainment and Adult Beverage Experiences
Cunningham Creek Winery	Shopping/Dining, Eatertainment and Adult Beverage Experiences
Green Front Furniture	Shopping/Dining, Eatertainment and Adult Beverage Experiences
Goochland Wineries	Shopping/Dining, Eatertainment and Adult Beverage Experiences
Mechanicsville Shopping Center	Shopping/Dining, Eatertainment and Adult Beverage Experiences
Scott Stadium	Sports
John Paul Jones Arena	Sports
The Diamond & Arthur Ashe Junior Athletic Center	Sports
River City Sportsplex	Sports
Stuart C. Siegel Center	Sports
Glover Park	Sports
City Stadium Complex	Sports
Virginia Motorsports Park	Sports

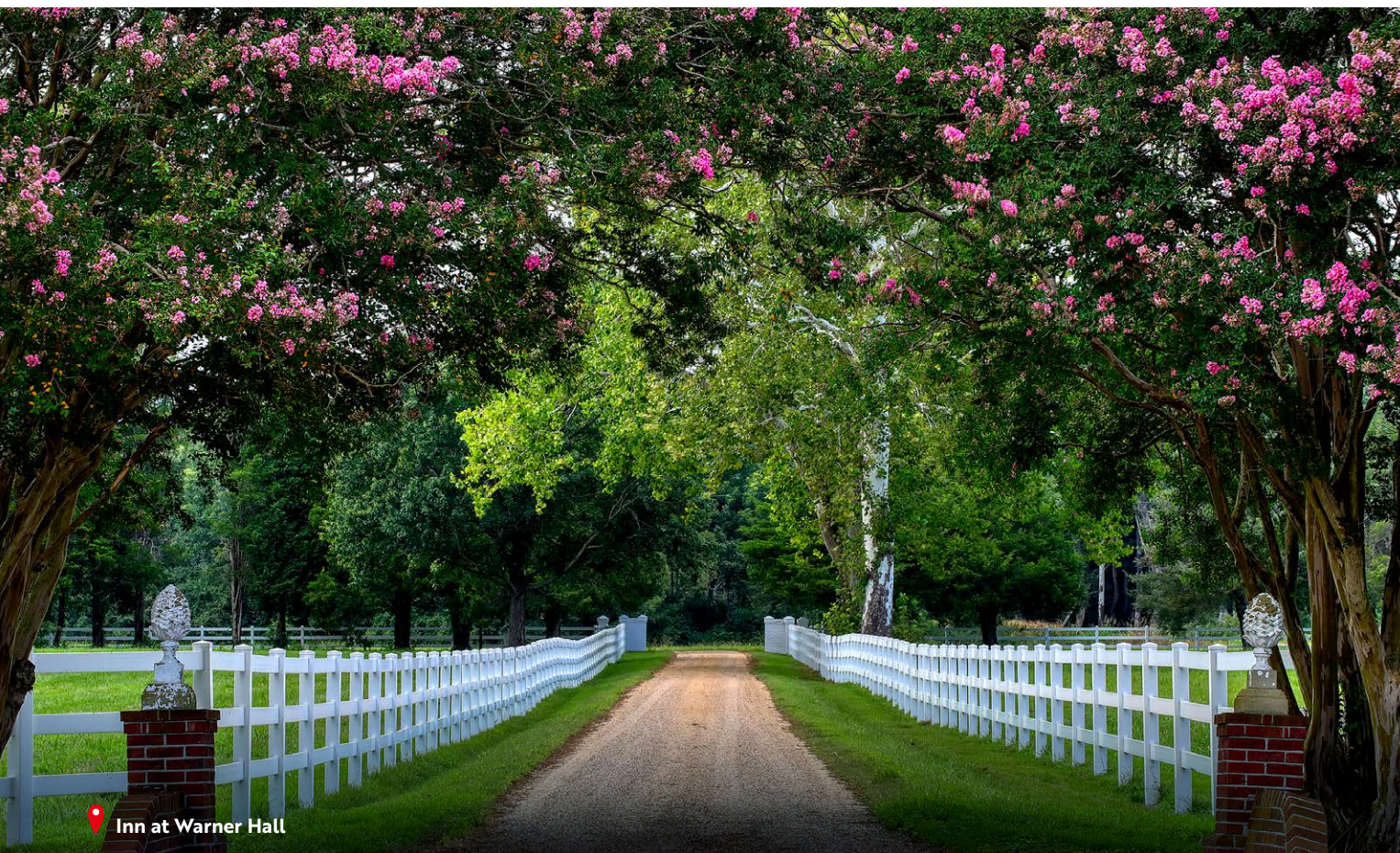


Chesapeake Bay POI by Pillars

POI	PILLAR OF PLACE
Stratford Hall	Arts and Culture
George Washington Birthplace	Arts and Culture
Deltaville Maritime Museum & Holly Point Park	Arts and Culture
Menokin	Arts and Culture
Gloucester Museum of History	Arts and Culture
Compass Entertainment Complex	Attractions and Gaming
Gloucester Main Street	Authentic Architecture and Public Space
Kilmarnock Main Street	Authentic Architecture and Public Space
Deltaville Yachting Club	Authentic Architecture and Public Space
Urbanna Virginia St	Authentic Architecture and Public Space
Gwynn Island (Including Hole in the Wall restaurant and Gwynn's Island Museum)	Authentic Architecture and Public Space
Prince Street Tappahannock	Authentic Architecture and Public Space
Mathews Main Street	Authentic Architecture and Public Space
Hughlett Point Preserve	Authentic Architecture and Public Space
West Point Main Street	Authentic Architecture and Public Space
Warsaw Main Street	Authentic Architecture and Public Space
Norton Yachts	Authentic Architecture and Public Space
West Point Boat Ramp	Authentic Architecture and Public Space
Tides Inn	Hotels and Hospitality
Bethpage Camp - Resort	Hotels and Hospitality
Grey's Point Campground Resort	Hotels and Hospitality
Gloucester Inns (Hampton Inn & Quality Inn)	Hotels and Hospitality
Belle Grove Plantation Bed and Breakfast	Hotels and Hospitality
Holiday Inn Express Tappahannock	Hotels and Hospitality
Kilmarnock Best Western	Hotels and Hospitality
Westmoreland State Park	Recreation and Natural Environment
Belle Isle State Park	Recreation and Natural Environment
Kilmarnock Town Park	Recreation and Natural Environment
Beach at Colonial Beach	Recreation and Natural Environment
Camp Cardinal RV Resort	Recreation and Natural Environment
Machicomoco State Park	Recreation and Natural Environment
Gloucester Point Beach Park	Recreation and Natural Environment
Caledon State Park	Recreation and Natural Environment
Williams Wharf Landing	Recreation and Natural Environment
Rappahannock River Valley Wildlife Refuge	Recreation and Natural Environment
Bethel Beach Natural Area Preserve	Recreation and Natural Environment
New Point Comfort Natural Area Preserve	Recreation and Natural Environment
Beaverdam Park	Recreation and Natural Environment
Haven Beach	Recreation and Natural Environment

Chesapeake Bay POI by Pillars

POI	PILLAR OF PLACE
Colonial Beach Town Pier (including restaurants)	Shopping/Dining, Eatertainment and Adult Beverage Experiences
Dockside Restaurant & Tiki Bar & Colonial Beach Yacht Center	Shopping/Dining, Eatertainment and Adult Beverage Experiences
Main Street Reedville Including restaurants and Inns	Shopping/Dining, Eatertainment and Adult Beverage Experiences
Deltaville Tap and Raw Bar	Shopping/Dining, Eatertainment and Adult Beverage Experiences
Rappahannock Oyster Company	Shopping/Dining, Eatertainment and Adult Beverage Experiences
Restaurants along Richmond Tappahannock Highway	Shopping/Dining, Eatertainment and Adult Beverage Experiences
The Estate at White Hall Vineyards	Shopping/Dining, Eatertainment and Adult Beverage Experiences
Ingleside Vineyards	Shopping/Dining, Eatertainment and Adult Beverage Experiences
Three Rivers Seafood	Shopping/Dining, Eatertainment and Adult Beverage Experiences
YROC Coastal Bar and Grill	Shopping/Dining, Eatertainment and Adult Beverage Experiences
Kings Highway Montross (Including Art of Coffee and Angelo's restaurant)	Shopping/Dining, Eatertainment and Adult Beverage Experiences
NN Burger	Shopping/Dining, Eatertainment and Adult Beverage Experiences
Wind Vineyards Laurel Grove	Shopping/Dining, Eatertainment and Adult Beverage Experiences
Acme Antiques	Shopping/Dining, Eatertainment and Adult Beverage Experiences
Virginia Motor Speedway	Sports



Coastal Virginia: Hampton Roads POI by Pillars

POI	PILLAR OF PLACE
Fort Monroe	Arts and Culture
Governor's Palace	Arts and Culture
Jamestown Settlement	Arts and Culture
Chrysler Museum	Arts and Culture
The Art Museums of Colonial Williamsburg	Arts and Culture
Norfolk Waterfront Venues (Nauticus & Hampton Roads Naval Museum & USS Wisconsin)	Arts and Culture
College of William and Mary	Arts and Culture
Berkeley Plantation	Arts and Culture
Harrison Opera House	Arts and Culture
Children's Museum of Virginia	Arts and Culture
American Revolution Museum at Yorktown	Arts and Culture
Christopher Newport University	Arts and Culture
Hampton University	Arts and Culture
Chippokes Plantation State Park & Forestry Museum	Arts and Culture
Military Aviation Museum	Arts and Culture
Virginia Wesleyan University	Arts and Culture
Old Dominion University	Arts and Culture
Suffolk Center for Cultural Arts	Arts and Culture
Norfolk State University	Arts and Culture
The Mariners' Museum and Park	Arts and Culture
Hampton University Museum	Arts and Culture
Virginia War Museum and Huntington Park	Arts and Culture
Watermen's Museum	Arts and Culture
Hermitage Museum and Gardens	Arts and Culture
Great Bridge Battlefield	Arts and Culture
Virginia Living Museum	Arts and Culture
Hampton History Museum	Arts and Culture
Virginia Museum of Contemporary Art	Arts and Culture
Isle of Wight County Museum	Arts and Culture
Busch Gardens Williamsburg	Attractions and Gaming
Virginia Beach Boardwalk	Attractions and Gaming
Rivers Casino Portsmouth	Attractions and Gaming
Norfolk Botanical Garden	Attractions and Gaming
Rosie's Gaming Emporium & Colonial Downs Race Track	Attractions and Gaming
Virginia Zoo and Lafayette Park	Attractions and Gaming
Virginia Aquarium & Marine Science Center	Attractions and Gaming
Atlantic Park	Attractions and Gaming
Town Point Park & Waterside District	Attractions and Gaming
Water Country USA	Attractions and Gaming
Rosie's Gaming Emporium	Attractions and Gaming

Coastal Virginia: Hampton Roads POI by Pillars

POI	PILLAR OF PLACE
Bacon's Castle	Attractions and Gaming
Virginia Air and Space Center	Attractions and Gaming
Ocean Breeze Water Park	Attractions and Gaming
Cape Henry Lighthouse	Attractions and Gaming
Naval Aviation Monument Park	Attractions and Gaming
Darden's Country Store	Attractions and Gaming
Cape Henry Lighthouse	Attractions and Gaming
Duke of Gloucester St / Merchants Square	Authentic Architecture and Public Space
Norfolk International Airport	Authentic Architecture and Public Space
Ghent District	Authentic Architecture and Public Space
The Docks at Hampton Downtown	Authentic Architecture and Public Space
Downtown Hampton	Authentic Architecture and Public Space
Smithfield Historic District	Authentic Architecture and Public Space
Norfolk Granby Street	Authentic Architecture and Public Space
Hilton Village Corridor	Authentic Architecture and Public Space
ViBe District	Authentic Architecture and Public Space
Yard District	Authentic Architecture and Public Space
Colley Avenue	Authentic Architecture and Public Space
Naval Station Norfolk Tour & Visitor Center	Authentic Architecture and Public Space
Colonial Williamsburg Visitor Center	Authentic Architecture and Public Space
Bluewater Yachting Center	Authentic Architecture and Public Space
Edge District	Authentic Architecture and Public Space
Newport News Airport	Authentic Architecture and Public Space
Jamestown-Scotland Ferry	Authentic Architecture and Public Space
Franklin Main Street	Authentic Architecture and Public Space
Newport News Amtrak Station	Authentic Architecture and Public Space
Naval Station Center	Authentic Architecture and Public Space
High Street Portsmouth	Authentic Architecture and Public Space
Washington Street	Authentic Architecture and Public Space
Historic Jamestowne	Authentic Architecture and Public Space
Toano Historic District	Authentic Architecture and Public Space
Norfolk Train Station	Authentic Architecture and Public Space
Surf Rider & Marina	Authentic Architecture and Public Space
Williamsburg Transportation Center	Authentic Architecture and Public Space
Suffolk Visitor Center	Authentic Architecture and Public Space
Oceanview Marina	Authentic Architecture and Public Space
Virginia Beach Visitor Information Center	Authentic Architecture and Public Space
Chesapeake Arboretum	Authentic Architecture and Public Space
New Kent Visitor Center	Authentic Architecture and Public Space
East Coast Gateway Welcome Center	Authentic Architecture and Public Space
Virginia Beach Convention Center	Conventions and Conferences

POI	PILLAR OF PLACE
Hampton Roads Convention Center	Conventions and Conferences
Smithfield Center	Conventions and Conferences
The NorVa	Entertainment
Hampton Coliseum	Entertainment
Scope Arena	Entertainment
The Cavalier Hotel & Beach Club	Hotels and Hospitality
Kingsmill Resort	Hotels and Hospitality
The Main Hotel	Hotels and Hospitality
Marriott Virginia Beach Resort	Hotels and Hospitality
Williamsburg Inn	Hotels and Hospitality
Williamsburg Lodge, Autograph Collection	Hotels and Hospitality
Great Wolf Lodge Williamsburg	Hotels and Hospitality
Hilton Vacation Club The Historic Powhatan Williamsburg	Hotels and Hospitality
Renaissance Hotel and Riverfront Park	Hotels and Hospitality
Williamsburg Hotels (Holiday Inn, Best Western, Patriots Inn etc)	Hotels and Hospitality
Norfolk Airport Hotels (Delta Hotels, Double Tree, Hampton Inn, Home2 Suites)	Hotels and Hospitality
Hampton Inn Virginia Beach - Oceanfront South	Hotels and Hospitality
Vacation Village	Hotels and Hospitality
Holiday Inn Express & Suites Virginia Beach Oceanfront	Hotels and Hospitality
Element Hotel	Hotels and Hospitality
The Colonies at Williamsburg	Hotels and Hospitality
Hampton Hotels (Hyatt Place, Extended Stay, Courtyard/Marriott, Days Inn, Best Western)	Hotels and Hospitality
Courtyard by Marriott Virginia Beach	Hotels and Hospitality
River's Rest Marina & Resort	Hotels and Hospitality
Chesapeake Hotels (Fairfield Inn, Comfort Inn, Courtyard, Residence Inn etc.)	Hotels and Hospitality
Smithfield Station (Marina)	Hotels and Hospitality
Newport News Hotels (Resident Inn, Courtyard, Extended Stay, Hampton Inn etc.)	Hotels and Hospitality
Colonial National Historic Park and Yorktown Battlefield Visitor Center	Recreation and Natural Environment
First Landing Beach	Recreation and Natural Environment
Great Dismal Swamp National Wildlife Refuge	Recreation and Natural Environment
Victoria Landing Park	Recreation and Natural Environment
Buckroe Beach and Park	Recreation and Natural Environment
Freedom Park	Recreation and Natural Environment
First Landing State Park Trail Center	Recreation and Natural Environment
York River State Park	Recreation and Natural Environment
Sandbridge Beach	Recreation and Natural Environment
Ocean View Beach Park	Recreation and Natural Environment
Mount Trashmore Park	Recreation and Natural Environment
James River Fishing Pier & Huntington Beach	Recreation and Natural Environment

Coastal Virginia: Hampton Roads POI by Pillars

POI	PILLAR OF PLACE
Jamestown Beach Event Park	Recreation and Natural Environment
Sandy Bottom Nature Park	Recreation and Natural Environment
King Lincoln Park	Recreation and Natural Environment
Windsor Castle Park	Recreation and Natural Environment
False Cape State Park	Recreation and Natural Environment
Northwest River Park	Recreation and Natural Environment
Chickahominy Riverfront Park	Recreation and Natural Environment
Ed Allen's Campground	Recreation and Natural Environment
Chickahominy Wildlife Area	Recreation and Natural Environment
Grandview Nature Preserve	Recreation and Natural Environment
Lake Drummond	Recreation and Natural Environment
Oak Grove Lake Park	Recreation and Natural Environment
Great Bridge Lock Park	Recreation and Natural Environment
Fort Boykin	Recreation and Natural Environment
Hoffler Creek Wildlife Preserve	Recreation and Natural Environment
College Creek Beach	Recreation and Natural Environment
Virginia Beach Town Center	Shopping/Dining, Eatertainment and Adult Beverage Experiences
Williamsburg Winery	Shopping/Dining, Eatertainment and Adult Beverage Experiences
Shirley Plantation & Vineyards	Shopping/Dining, Eatertainment and Adult Beverage Experiences
MacArthur Center	Shopping/Dining, Eatertainment and Adult Beverage Experiences
Prince George Street Shops & Restaurants	Shopping/Dining, Eatertainment and Adult Beverage Experiences
Newport News City Center	Shopping/Dining, Eatertainment and Adult Beverage Experiences
Lynnhaven Marina Restaurants	Shopping/Dining, Eatertainment and Adult Beverage Experiences
1865 Brewing Company	Shopping/Dining, Eatertainment and Adult Beverage Experiences
New Kent Winery	Shopping/Dining, Eatertainment and Adult Beverage Experiences
Yorktown Beach (Restaurants & Shops)	Shopping/Dining, Eatertainment and Adult Beverage Experiences
Billsburg Brewery	Shopping/Dining, Eatertainment and Adult Beverage Experiences
Virginia Beer Company (Yorktown)	Shopping/Dining, Eatertainment and Adult Beverage Experiences
Norfolk Premium Outlets	Shopping/Dining, Eatertainment and Adult Beverage Experiences
Williamsburg Premium Outlets	Shopping/Dining, Eatertainment and Adult Beverage Experiences
Wharf Hill Brewing Co	Shopping/Dining, Eatertainment and Adult Beverage Experiences
Bier Garden	Shopping/Dining, Eatertainment and Adult Beverage Experiences
Greenbrier Mall	Shopping/Dining, Eatertainment and Adult Beverage Experiences
The Vanguard Brewpub and Distillery	Shopping/Dining, Eatertainment and Adult Beverage Experiences
Surry Seafood Co	Shopping/Dining, Eatertainment and Adult Beverage Experiences
Hot Tuna Bar and Grill	Shopping/Dining, Eatertainment and Adult Beverage Experiences
Indian Fields Tavern	Shopping/Dining, Eatertainment and Adult Beverage Experiences
Lockside Bar & Grill	Shopping/Dining, Eatertainment and Adult Beverage Experiences
Rudee's Inlet Restaurants	Shopping/Dining, Eatertainment and Adult Beverage Experiences
The Hubs Vine	Shopping/Dining, Eatertainment and Adult Beverage Experiences

POI	PILLAR OF PLACE
Cul's Courthouse Grille	Shopping/Dining, Eatertainment and Adult Beverage Experiences
Saude Creek Vineyards	Shopping/Dining, Eatertainment and Adult Beverage Experiences
Bill Forrest Seafood	Shopping/Dining, Eatertainment and Adult Beverage Experiences
Gurganus Peanut Outlet	Shopping/Dining, Eatertainment and Adult Beverage Experiences
Virginia Beach Sports Center	Sports
Hampton Aquaplex	Sports
Harbor Park	Sports
Warhill Sports Complex	Sports
Princess Anne Athletic Complex	Sports
Boo Williams Sportsplex	Sports
Hampton Roads Soccer Complex	Sports
S.B. Ballard Stadium	Sports
Greenbrier Sports Park	Sports
Langley Speedway	Sports



Coastal Virginia: Eastern Shore

POI by Pillars

POI	PILLAR OF PLACE
Maddox Blvd Chincoteague (Refuge Inn, Museum of Chincoteague Island)	Arts and Culture
Dunne Avenue (Including Eastern shore Railway Museum and Club Bar Café)	Arts and Culture
Maui Jack's Water Park & KOA Campground	Attractions and Gaming
NASA's Wallops Flight Facility Visitor Center	Attractions and Gaming
Barrier Islands Center	Attractions and Gaming
Assateague Lighthouse	Attractions and Gaming
NASA Wallops Visitor Center	Attractions and Gaming
Saxis Public Pier including Restaurants (Martha's Kitchen and Capt. E's)	Attractions and Gaming
Cape Charles Rosenwald School	Attractions and Gaming
Mason Avenue (Restaurants, Hotel Cape Charles)	Authentic Architecture and Public Space
Downtown Chincoteague Main Street & Waterfront Park (Bill's Prime Seafood, Island Theater, Don's Seafood)	Authentic Architecture and Public Space
The Shanty / Town Marina	Authentic Architecture and Public Space
Onancock Market St	Authentic Architecture and Public Space
Curtis Merritt Harbor and Inlet View	Authentic Architecture and Public Space
Central Park/Cape Charles Historic District	Authentic Architecture and Public Space
North Street (The Charlotte Hotel and Restaurant, Blarney Stone pub)	Authentic Architecture and Public Space
Tangier Main Ridge Road	Authentic Architecture and Public Space
Downtown Exmore (Main Street)	Authentic Architecture and Public Space
Eastern Shore of Virginia Welcome Center	Authentic Architecture and Public Space
Downtown Eastville	Authentic Architecture and Public Space
Virginia Welcome Center at New Church	Authentic Architecture and Public Space
Eastern Shore Chamber of Commerce	Authentic Architecture and Public Space
Sun Outdoors Chincoteague Bay	Hotels and Hospitality
Tall Pines Harbor	Hotels and Hospitality
Chincoteague Main Street Hotels (Marina Bay, Anchor Inn, Waterside Inn)	Hotels and Hospitality
Exmore Hotels	Hotels and Hospitality
Wachapreague Inn	Hotels and Hospitality
Assateague Island National Seashore	Recreation and Natural Environment
Cherrystone Family Camping Resort	Recreation and Natural Environment
Cape Charles Beachfront	Recreation and Natural Environment
Kiptopeke State Park	Recreation and Natural Environment
Island Creamery	Shopping/Dining, Eateertainment and Adult Beverage Experiences
Onancock Wharf & Marina (Mallard's Restaurant and Tangier-Onancock Ferry)	Shopping/Dining, Eateertainment and Adult Beverage Experiences
Cape Charles Brewery	Shopping/Dining, Eateertainment and Adult Beverage Experiences
Exmore Diner	Shopping/Dining, Eateertainment and Adult Beverage Experiences

Northern Virginia

POI by Pillars

POI	PILLAR OF PLACE
US Marine Corps War Memorial	Arts and Culture
National Museum of the Marine Corps	Arts and Culture
Steven F. Udvar-Hazy Center	Arts and Culture
Arlington National Cemetery	Arts and Culture
National Museum of the US Army	Arts and Culture
Torpedo Factory Art Center	Arts and Culture
Oatlands Historic House	Arts and Culture
Hylton Performing Arts Center	Arts and Culture
George Mason University	Arts and Culture
Manassas National Battlefield Park	Arts and Culture
George Washington's Mount Vernon	Arts and Culture
Alexandria History Museum at the Lyceum	Arts and Culture
University of Mary Washington	Arts and Culture
Warrenton Main Street corridor (Including The Fauquier History Museum)	Arts and Culture
Culpeper Depot and Museum of History	Arts and Culture
Spotsylvania Courthouse Battlefield	Arts and Culture
Chancellorsville Battlefield Park and Visitor Center	Arts and Culture
Carlyle House Historic Park	Arts and Culture
George Mason's Gunston Hall	Arts and Culture
Kalahari Resorts & Conventions	Attractions and Gaming
National Botanic Garden at Chantilly	Attractions and Gaming
Meadowlark Botanical Gardens	Attractions and Gaming
Alexandria Union Station	Authentic Architecture and Public Space
Washington Dulles International Airport	Authentic Architecture and Public Space
Old Town Alexandria Historical District - King Street	Authentic Architecture and Public Space
Ronald Reagan Washington National Airport	Authentic Architecture and Public Space
Occoquan Historic District	Authentic Architecture and Public Space
Court House (Clarendon Blvd/Wilson Blvd Corridor stretching from N Barton St to N Troy St)	Authentic Architecture and Public Space
Main Street Fairfax City including Old Town Square, Fairfax Visitor Center and Historic Courthouse Museum	Authentic Architecture and Public Space
Washington St Corridor	Authentic Architecture and Public Space
Maple Avenue Corridor	Authentic Architecture and Public Space
Historic Downtown Fredericksburg (Caroline St and William St Corridor, includes Fredericksburg Visitor Center)	Authentic Architecture and Public Space
Culpeper Main Street	Authentic Architecture and Public Space
Potomac Mills	Authentic Architecture and Public Space
Alexandria Train Station	Authentic Architecture and Public Space
Crystal City Metro Station	Authentic Architecture and Public Space
Falls Church Broad Street (from N Washington to Virginia)	Authentic Architecture and Public Space
King Street Metro Rail	Authentic Architecture and Public Space
Ballston Metro Station	Authentic Architecture and Public Space

Northern Virginia POI by Pillars

POI	PILLAR OF PLACE
Rosslyn Metrorail Station	Authentic Architecture and Public Space
Manassas Train Station	Authentic Architecture and Public Space
Occoquan Harbor & Marina	Authentic Architecture and Public Space
The Plains Main Street	Authentic Architecture and Public Space
Marshall Main Street	Authentic Architecture and Public Space
Virginia Welcome Center Fredericksburg	Authentic Architecture and Public Space
Bridgewater Main Street	Authentic Architecture and Public Space
Northern Virginia Gateway Welcome Center	Authentic Architecture and Public Space
Bowling Green Main Street	Authentic Architecture and Public Space
Fredericksburg Amtrak Station	Authentic Architecture and Public Space
Dayton Main Street	Authentic Architecture and Public Space
Broadway Main Street	Authentic Architecture and Public Space
Main Street Buena Vista	Authentic Architecture and Public Space
Remington Main Street	Authentic Architecture and Public Space
Vienna Fairfax Metro Station	Authentic Architecture and Public Space
Belmont Bay Harbor & Marina	Authentic Architecture and Public Space
Dulles Expo Center	Conventions and Conferences
Stevenson Ridge	Conventions and Conferences
Jiffy Lube Live	Entertainment
Wolf Trap National Park for the Performing Arts	Entertainment
Salamander Middleburg	Hotels and Hospitality
Lansdowne Resort	Hotels and Hospitality
Crystal Gateway Marriott	Hotels and Hospitality
Renaissance Arlington Capital View Hotel	Hotels and Hospitality
Dulles Airport Hotels (The Westin, Candlewood Suites, Sonesta ES Suites, Hyatt Place, Courtyard by Marriott)	Hotels and Hospitality
DoubleTree by Hilton Crystal City	Hotels and Hospitality
Old Town Alexandria hotels (Hampton Inn, Kimpton Lorian, Hyatt Centric)	Hotels and Hospitality
Hyatt Centric Arlington	Hotels and Hospitality
Morrison House Old Town Alexandria	Hotels and Hospitality
The Westin Arlington Gateway	Hotels and Hospitality
Hilton McLean Tysons Corner	Hotels and Hospitality
Hilton Garden Inn Arlington/Courthouse Plaza	Hotels and Hospitality
Hampton Inn & Suites Fredericksburg South	Hotels and Hospitality
DoubleTree and Courtyard Hotels Tysons Corner	Hotels and Hospitality
Fredericksburg Hotels (Hampton Inn & Suites, Homewood Suites, Hilton Garden Inn)	Hotels and Hospitality
Leesburg Hotels (Homewood Suites, Hampton Inn & Suites, Best Western, Red Roof Inn, Comfort Suites)	Hotels and Hospitality
Stafford Hotels (Sleep Inn, Comfort Suites, Holiday Inn)	Hotels and Hospitality
Wilderness Presidential Resort	Hotels and Hospitality
Fairfax City Hotels (Best Western, Residence Inn, Holiday Inn)	Hotels and Hospitality

POI	PILLAR OF PLACE
Culpeper County Hotels (Best Western, Holiday Inn Express, Quality Inn)	Hotels and Hospitality
Tru Hotel	Hotels and Hospitality
Great Falls Park	Recreation and Natural Environment
Robert Trent Jones Golf Club	Recreation and Natural Environment
Grand Caverns	Recreation and Natural Environment
Claude Moore Park & Recreation Center	Recreation and Natural Environment
Lake Fairfax Park and Water Mine Family Swimmin' Hole	Recreation and Natural Environment
Fredericksburg & Spotsylvania National Military Park - Marye's Heights/ Visitor Center	Recreation and Natural Environment
Cameron Run Regional Park	Recreation and Natural Environment
Morven Park	Recreation and Natural Environment
Mason Neck State Park	Recreation and Natural Environment
Leesylvania State Park	Recreation and Natural Environment
Bull Run Regional Park	Recreation and Natural Environment
Winkler Botanical Preserve	Recreation and Natural Environment
Sky Meadows State Park	Recreation and Natural Environment
Patriot North Park	Recreation and Natural Environment
Fountainhead Regional Park and Bull Run-Occoquan Trail Access	Recreation and Natural Environment
Ball's Bluff Battlefield Regional Park	Recreation and Natural Environment
Manassas Park Community Center	Recreation and Natural Environment
Lake Anna State Park	Recreation and Natural Environment
Culpeper Battlefield State Park	Recreation and Natural Environment
Widewater State Park	Recreation and Natural Environment
Smith Lake Park	Recreation and Natural Environment
Scott's Run Nature Preserve	Recreation and Natural Environment
Fashion Centre at Pentagon City	Shopping/Dining, Eatertainment and Adult Beverage Experiences
Ballston Quarter	Shopping/Dining, Eatertainment and Adult Beverage Experiences
Shirlington Urban Village	Shopping/Dining, Eatertainment and Adult Beverage Experiences
Rosslyn (Lynn Street)	Shopping/Dining, Eatertainment and Adult Beverage Experiences
Inn at Little Washington	Shopping/Dining, Eatertainment and Adult Beverage Experiences
Crystal City Restaurants (Crystal Drive Corridor)	Shopping/Dining, Eatertainment and Adult Beverage Experiences
Eden Center	Shopping/Dining, Eatertainment and Adult Beverage Experiences
Clarendon (Clarendon Blvd/Wilson Blvd Corridor stretching from N Irving St to N Danville St)	Shopping/Dining, Eatertainment and Adult Beverage Experiences
Reston Town Center (Incl. Tephra Institute of Contemporary Art, Hyatt Regency)	Shopping/Dining, Eatertainment and Adult Beverage Experiences
Stone Tower Winery	Shopping/Dining, Eatertainment and Adult Beverage Experiences
Mosaic District - District Avenue	Shopping/Dining, Eatertainment and Adult Beverage Experiences
Winery at La Grange	Shopping/Dining, Eatertainment and Adult Beverage Experiences
Bluemont Vineyard	Shopping/Dining, Eatertainment and Adult Beverage Experiences
Manassas City Center	Shopping/Dining, Eatertainment and Adult Beverage Experiences
Tysons Corner Center	Shopping/Dining, Eatertainment and Adult Beverage Experiences

Northern Virginia

POI by Pillars

POI	PILLAR OF PLACE
Hillsboro Vineyards	Shopping/Dining, Eatertainment and Adult Beverage Experiences
Potomac Point Winery	Shopping/Dining, Eatertainment and Adult Beverage Experiences
Del Ray (Mt Vernon Ave from Commonwealth to Glendale)	Shopping/Dining, Eatertainment and Adult Beverage Experiences
Barrel Oak Winery & Farm Taphouse	Shopping/Dining, Eatertainment and Adult Beverage Experiences
Columbia Pike Corridor (Stretching S Highland St to S Wayne St)	Shopping/Dining, Eatertainment and Adult Beverage Experiences
Shopping Plaza at Dumfries including Rosie's Gaming	Shopping/Dining, Eatertainment and Adult Beverage Experiences
Dirt Farm Brewing	Shopping/Dining, Eatertainment and Adult Beverage Experiences
Breaux Vineyards	Shopping/Dining, Eatertainment and Adult Beverage Experiences
A Smith Bowman Distillery	Shopping/Dining, Eatertainment and Adult Beverage Experiences
Harpers Ferry Brewing	Shopping/Dining, Eatertainment and Adult Beverage Experiences
Springfield Town Center	Shopping/Dining, Eatertainment and Adult Beverage Experiences
Port City Brewing	Shopping/Dining, Eatertainment and Adult Beverage Experiences
Catoctin Creek Distilling Company	Shopping/Dining, Eatertainment and Adult Beverage Experiences
Wilderness Run Vineyards	Shopping/Dining, Eatertainment and Adult Beverage Experiences
The Winery at Bull Run	Shopping/Dining, Eatertainment and Adult Beverage Experiences
KO Distilling	Shopping/Dining, Eatertainment and Adult Beverage Experiences
Leesburg Premium Outlets	Shopping/Dining, Eatertainment and Adult Beverage Experiences
Battlefield Country Store	Shopping/Dining, Eatertainment and Adult Beverage Experiences
The Restaurant at Patowmack Farm	Shopping/Dining, Eatertainment and Adult Beverage Experiences
Old Ox Brewery	Shopping/Dining, Eatertainment and Adult Beverage Experiences
Paradise Springs Winery	Shopping/Dining, Eatertainment and Adult Beverage Experiences
Moo Thru	Shopping/Dining, Eatertainment and Adult Beverage Experiences
Randolph's on the River	Shopping/Dining, Eatertainment and Adult Beverage Experiences
Sweet Rose Bakeshop	Shopping/Dining, Eatertainment and Adult Beverage Experiences
Broad Way Lovettsville	Shopping/Dining, Eatertainment and Adult Beverage Experiences
Dumfries Shopping Plaza	Shopping/Dining, Eatertainment and Adult Beverage Experiences
Crooked Run Fermentation	Shopping/Dining, Eatertainment and Adult Beverage Experiences
Stafford Retail Corridor	Shopping/Dining, Eatertainment and Adult Beverage Experiences
Philip A. Bolen Memorial Park	Sports
Eagle Bank Arena	Sports
Great Meadow Equestrian Center	Sports
Publix Virginia Soccer Training Center	Sports
Dominion Raceway	Sports
Culpeper Sports Complex	Sports
Ashburn Ice House	Sports
NOVA BMX and PWC Stadium Complex	Sports
EG Smith Baseball Complex	Sports

Shenandoah Valley

POI by Pillars

POI	PILLAR OF PLACE
Washington and Lee University	Arts and Culture
James Madison University	Arts and Culture
Woodrow Wilson Presidential Library	Arts and Culture
Virginia Military Institute & VMI Museum	Arts and Culture
Shenandoah University	Arts and Culture
Virginia Museum of the Civil War & New Market Battlefield State Historical Park	Arts and Culture
Mary Baldwin University	Arts and Culture
Museum of the Shenandoah Valley	Arts and Culture
Third Winchester Battlefield Park	Arts and Culture
Kernstown Battlefield	Arts and Culture
Buc-ee's Rockingham	Attractions and Gaming
Virginia Safari Park	Attractions and Gaming
Blackfriars Playhouse	Attractions and Gaming
Virginia Beer Museum	Attractions and Gaming
Frontier Culture Museum	Attractions and Gaming
Dinosaur Land	Attractions and Gaming
Natural Bridge Zoo	Attractions and Gaming
Warren County Fairgrounds	Attractions and Gaming
Downtown Staunton (Beverly Street)	Authentic Architecture and Public Space
Downtown Harrisonburg	Authentic Architecture and Public Space
Main Street Luray	Authentic Architecture and Public Space
Old Town Winchester Historic District (N & S Loudoun St)	Authentic Architecture and Public Space
Downtown Front Royal (E Main Street)	Authentic Architecture and Public Space
Main Street Lexington	Authentic Architecture and Public Space
New Market Downtown	Authentic Architecture and Public Space
Dickey Ridge Visitor Center	Authentic Architecture and Public Space
Edinburg Main Street	Authentic Architecture and Public Space
Woodstock Main Street	Authentic Architecture and Public Space
Strasburg King Street	Authentic Architecture and Public Space
Abram's Delight & Winchester-Frederick County Visitor Center	Authentic Architecture and Public Space
Sperryville Main Street	Authentic Architecture and Public Space
Downtown Waynesboro (Main Street)	Authentic Architecture and Public Space
Hardesty-Higgins House Visitor Center	Authentic Architecture and Public Space
Berryville Main Street	Authentic Architecture and Public Space
Downtown Staunton Visitor Center	Authentic Architecture and Public Space
Visitor Center at Lexington	Authentic Architecture and Public Space
Elkton Downtown	Authentic Architecture and Public Space
Shenandoah Valley Airport	Authentic Architecture and Public Space
Staunton Train Station	Authentic Architecture and Public Space
Mount Jackson Main Street	Authentic Architecture and Public Space

Shenandoah Valley POI by Pillars

POI	PILLAR OF PLACE
Virginia Welcome Center at Clear Brook	Authentic Architecture and Public Space
The Blackburn Inn & Conference Center	Conventions and Conferences
Natural Bridge Historic Hotel and Conference Center	Conventions and Conferences
American Shakespeare Center's Blackfriars Playhouse	Entertainment
Wayne Theatre	Entertainment
Massanutten Resort	Hotels and Hospitality
Bryce Resort	Hotels and Hospitality
Big Meadows Lodge	Hotels and Hospitality
Wyndham George Washington Grand Hotel	Hotels and Hospitality
Mimslyn Inn	Hotels and Hospitality
Waynesboro Hotels (Holiday Inn, Residence Inn, Comfort Inn)	Hotels and Hospitality
Shenandoah Acres Family Campground	Hotels and Hospitality
Cabins and Wedding Venue at Shenandoah Woods in Stanley	Hotels and Hospitality
Harrisonburg Hotels (Quality Inn, Sleep Inn, Courtyard by Marriott)	Hotels and Hospitality
Lexington Hotels (Country Inn, Best Western, Holiday Inn)	Hotels and Hospitality
Winchester City Hotels (Super 8, LaQuinta, Sleep Inn, Fairfield Inn)	Hotels and Hospitality
Staunton East Hotels	Hotels and Hospitality
Loft Mountain Campground	Hotels and Hospitality
Shenandoah National Park - Thornton Gap Entrance	Recreation and Natural Environment
Shenandoah National Park - Swift Run Gap Entrance	Recreation and Natural Environment
Luray Caverns	Recreation and Natural Environment
Natural Bridge State Park	Recreation and Natural Environment
Lake A. Willis Robertson Recreation Area	Recreation and Natural Environment
Shenandoah Caverns	Recreation and Natural Environment
South Fork of Shenandoah River	Recreation and Natural Environment
Skyline Caverns	Recreation and Natural Environment
Natural Chimneys Park and Campground	Recreation and Natural Environment
Rockfish Gap Entrance Station	Recreation and Natural Environment
Humpback Rocks Visitor Center	Recreation and Natural Environment
Gipsy Hill Park	Recreation and Natural Environment
Caverns at Natural Bridge	Recreation and Natural Environment
Sherando Lake Recreation Area	Recreation and Natural Environment
Cedar Creek and Belle Grove National Historical Park	Recreation and Natural Environment
Seven Bends State Park	Recreation and Natural Environment
Shenandoah River State Park Visitor Center	Recreation and Natural Environment
Harry F. Byrd Sr. Visitor Center	Recreation and Natural Environment
State Arboretum of Virginia	Recreation and Natural Environment
Glen Maury Park	Recreation and Natural Environment
Edith J. Carrier Arboretum	Recreation and Natural Environment
Big Run Loop & Doyles River Trailhead	Recreation and Natural Environment
Lake Arrowhead Recreation Park	Recreation and Natural Environment

POI	PILLAR OF PLACE
Woodstock Tower	Recreation and Natural Environment
CrossKeys Vineyards at Mount Crawford	Shopping/Dining, Eatertainment and Adult Beverage Experiences
CrossKeys Vineyards	Shopping/Dining, Eatertainment and Adult Beverage Experiences
Basic City Campus	Shopping/Dining, Eatertainment and Adult Beverage Experiences
Stable Craft Brewing	Shopping/Dining, Eatertainment and Adult Beverage Experiences
Woodstock Brew House	Shopping/Dining, Eatertainment and Adult Beverage Experiences
Buc-ees Mount Crawford	Shopping/Dining, Eatertainment and Adult Beverage Experiences
White Oak Lavender Farm & The Purple Wolf Vineyard	Shopping/Dining, Eatertainment and Adult Beverage Experiences
The Apple House	Shopping/Dining, Eatertainment and Adult Beverage Experiences
Virginia Horse Center	Sports
Atlantic Union Bank Center	Sports
Bridgeforth Stadium	Sports
Shenandoah Speedway	Sports



Southern Virginia POI by Pillars

POI	PILLAR OF PLACE
Danville Museum of Fine Arts and History	Arts and Culture
AAF Tank Museum	Arts and Culture
Museum of Natural History	Arts and Culture
Caesars Virginia Hotel & Casino	Attractions and Gaming
Virginia International Raceway	Attractions and Gaming
Danville Main Street	Authentic Architecture and Public Space
Martinsville Main Street	Authentic Architecture and Public Space
Virginia Avenue Clarksville	Authentic Architecture and Public Space
Downtown South Boston	Authentic Architecture and Public Space
Patrick Henry's Red Hill	Authentic Architecture and Public Space
Philpott Marina & Visitor Center	Authentic Architecture and Public Space
Main Street South Hill	Authentic Architecture and Public Space
Virginia Welcome Center at Bracey	Authentic Architecture and Public Space
Chatham Main Street	Authentic Architecture and Public Space
Town of Lawrenceville	Authentic Architecture and Public Space
Danville Welcome Center	Authentic Architecture and Public Space
Virginia Welcome Center at Skippers	Authentic Architecture and Public Space
Halifax County Welcome Center	Authentic Architecture and Public Space
Brookneal Main Street	Authentic Architecture and Public Space
Chase City Main Street	Authentic Architecture and Public Space
Downtown Emporia	Authentic Architecture and Public Space
Gretna Historic Commercial District	Authentic Architecture and Public Space
Halifax County Main Street	Authentic Architecture and Public Space
Kenbridge Town (Broad Street)	Authentic Architecture and Public Space
Victoria Main Street	Authentic Architecture and Public Space
Keysville King Street	Authentic Architecture and Public Space
Drakes Branch Main Street	Authentic Architecture and Public Space
The Berry Hill Resort & Conference Center	Conventions and Conferences
Olde Dominion Agricultural Complex	Entertainment
Danville Hotels (Courtyard by Marriott, Quality Inn, Holiday Inn Express, Super 8)	Hotels and Hospitality
Vista Pointe Resort	Hotels and Hospitality
Lake Gaston Americamps	Hotels and Hospitality
Martinsville Hotels (Hampton Inn, Comfort Inn, Econolodge)	Hotels and Hospitality
South Boston Hotels (Super 8, Days Inn, Clarion Pointe)	Hotels and Hospitality
Emporia Hotels (Quality Inn, Days Inn, Hampton Inn, Sleep Inn)	Hotels and Hospitality
Staunton River Battlefield State Park	Recreation and Natural Environment
Staunton River State Park	Recreation and Natural Environment
Occoneetchee State Park	Recreation and Natural Environment
South Hill Centennial Park	Recreation and Natural Environment
Anglers Park	Recreation and Natural Environment

POI	PILLAR OF PLACE
Tobacco Heritage Trailhead	Recreation and Natural Environment
Pickett Reservoir Recreational Area	Recreation and Natural Environment
Good Earth Peanuts	Shopping/Dining, Eateertainment and Adult Beverage Experiences
Rosemont Vineyards & Winery	Shopping/Dining, Eateertainment and Adult Beverage Experiences
Buggs Island Brewing	Shopping/Dining, Eateertainment and Adult Beverage Experiences
Shady Shack Grill & Bar	Shopping/Dining, Eateertainment and Adult Beverage Experiences
2 Witches Winery & Brewing Co	Shopping/Dining, Eateertainment and Adult Beverage Experiences
Crossing at the Dan	Shopping/Dining, Eateertainment and Adult Beverage Experiences
Bridgewater Bar & Grill	Shopping/Dining, Eateertainment and Adult Beverage Experiences
Smith River Sports Complex	Sports
Danville Memorial Park (Dan Daniel)	Sports
Martinsville Speedway	Sports
South Boston Speedway	Sports



Southwest Virginia: Blue Ridge Highlands

POI by Pillars

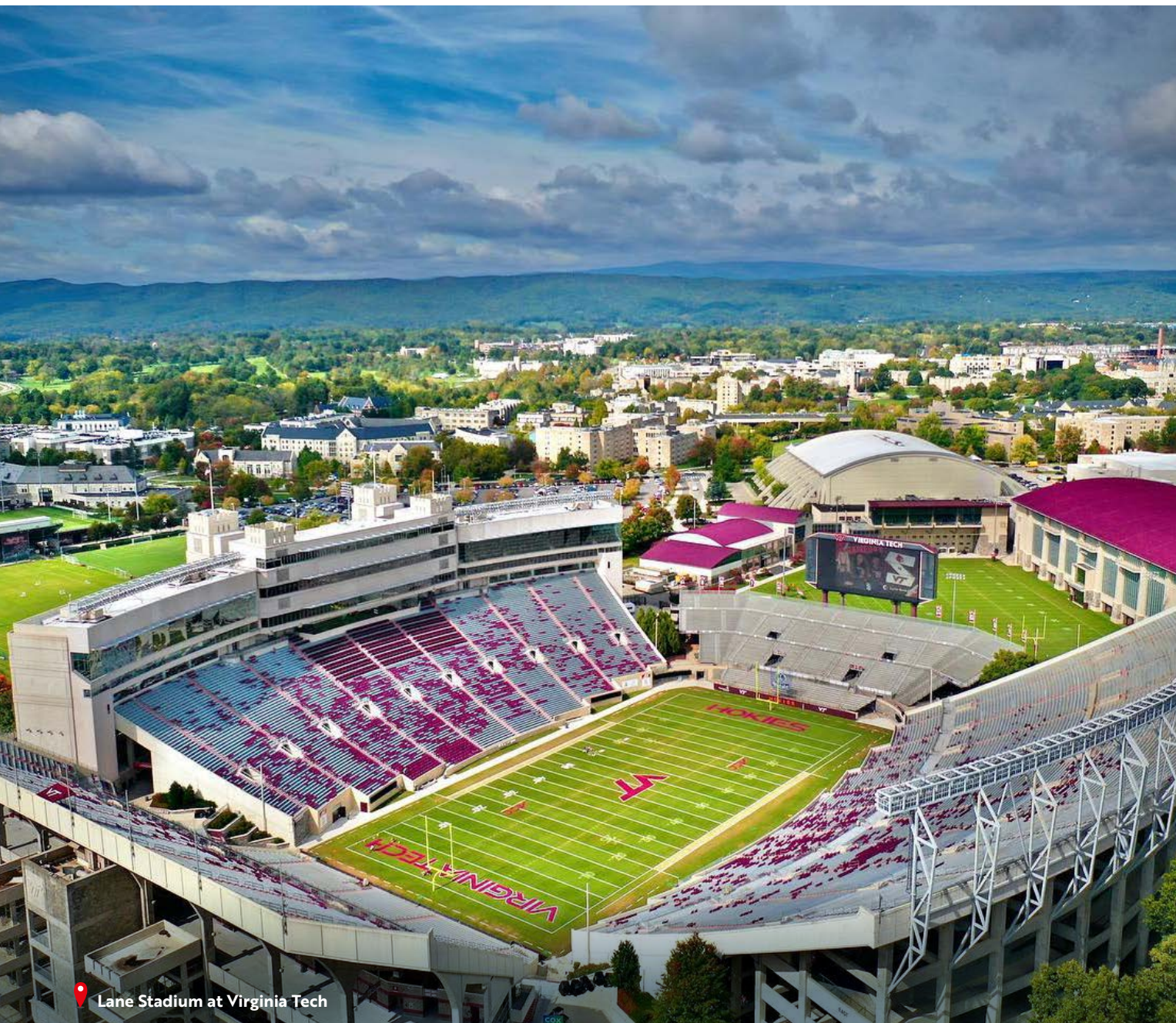
POI	PILLAR OF PLACE
Virginia Tech	Arts and Culture
Emory & Henry University	Arts and Culture
Birthplace of Country Music Museum	Arts and Culture
Wohlfahrt Haus Dinner Theater	Arts and Culture
Radford University	Arts and Culture
The University of Virginia's College at Wise	Arts and Culture
Wolf Creek Indian Village	Arts and Culture
Moss Arts Center	Arts and Culture
Hard Rock Hotel & Casino Bristol	Attractions and Gaming
Big Walker Lookout	Attractions and Gaming
Hahn Horticulture Garden	Attractions and Gaming
Downtown State St Bristol	Authentic Architecture and Public Space
Lee Highway Main Street	Authentic Architecture and Public Space
Mabry Mill	Authentic Architecture and Public Space
Galax Main Street	Authentic Architecture and Public Space
Floyd Main Street	Authentic Architecture and Public Space
Marion Main Street	Authentic Architecture and Public Space
Stuart Main Street	Authentic Architecture and Public Space
Damascus Main Street	Authentic Architecture and Public Space
Main Street Wytheville	Authentic Architecture and Public Space
Main Street Blacksburg	Authentic Architecture and Public Space
Radford Main Street	Authentic Architecture and Public Space
Downtown Christiansburg	Authentic Architecture and Public Space
Hillsville Main Street	Authentic Architecture and Public Space
Abingdon Visitor Center	Authentic Architecture and Public Space
Mountain 2 Island Outfitter at Rockhouse Marina	Authentic Architecture and Public Space
Rocky Knob Visitor Center	Authentic Architecture and Public Space
Narrows Main Street	Authentic Architecture and Public Space
Virginia Welcome Center Bristol	Authentic Architecture and Public Space
Independence Main Street	Authentic Architecture and Public Space
Virginia Welcome Center Rocky Gap	Authentic Architecture and Public Space
Glade Spring Main Street	Authentic Architecture and Public Space
Saltville Main Street	Authentic Architecture and Public Space
Virginia Welcome Center Lamsburg	Authentic Architecture and Public Space
Main Street Pulaski	Authentic Architecture and Public Space
Pearisburg Main Street	Authentic Architecture and Public Space
Chilhowie Main Street	Authentic Architecture and Public Space
Inn at Virginia Tech & Skelton Conference Center	Conventions and Conferences
Lincoln Theatre	Entertainment
Blue Ridge Music Center	Entertainment
Primland Resort	Hotels and Hospitality

POI	PILLAR OF PLACE
The Martha Washington Inn & Spa	Hotels and Hospitality
The Bristol Hotel	Hotels and Hospitality
Sessions Hotel	Hotels and Hospitality
The Highlander Hotel	Hotels and Hospitality
Bolling Wilson Hotel	Hotels and Hospitality
Fancy Gap KOA & Dining	Hotels and Hospitality
Eupepsia Wellness Resort	Hotels and Hospitality
Christiansburg Hotels (Fairfield Inn, Days Inn, Homewood Suites)	Hotels and Hospitality
Old Damascus Inn	Hotels and Hospitality
Jackson Park Inn	Hotels and Hospitality
Radford Hotels (La Quinta, Best Western, Econo Lodge)	Hotels and Hospitality
Hillsville Hotels (Quality Inn, Hampton Inn, Holiday Inn)	Hotels and Hospitality
Kanawha Valley Arena	Hotels and Hospitality
Virginia Creeper Trailhead - Abingdon	Recreation and Natural Environment
Grayson Highlands State Park Visitor Center	Recreation and Natural Environment
New River Trail State Park	Recreation and Natural Environment
Fort Chiswell Animal Park	Recreation and Natural Environment
Hungry Mother State Park	Recreation and Natural Environment
Claytor Lake State Park	Recreation and Natural Environment
Cascade Falls Trailhead	Recreation and Natural Environment
Fairy Stone State Park	Recreation and Natural Environment
Shot Tower Historical State Park	Recreation and Natural Environment
Sugar Hollow Park	Recreation and Natural Environment
Mendota Trailhead - Bristol	Recreation and Natural Environment
New River Canoe and Campground	Recreation and Natural Environment
Elk Garden Trailhead - MT Rogers	Recreation and Natural Environment
Beaver Dam Creek Trailhead - Carter Pines	Recreation and Natural Environment
Nicewonder Farm Vineyards	Shopping/Dining, Eatertainment and Adult Beverage Experiences
FloydFest	Shopping/Dining, Eatertainment and Adult Beverage Experiences
Floyd Country Store	Shopping/Dining, Eatertainment and Adult Beverage Experiences
Draper Mercantile & Trading Company	Shopping/Dining, Eatertainment and Adult Beverage Experiences
Damascus Brewery	Shopping/Dining, Eatertainment and Adult Beverage Experiences
Marion Plaza Shopping Center	Shopping/Dining, Eatertainment and Adult Beverage Experiences
Rising Silo Brewery	Shopping/Dining, Eatertainment and Adult Beverage Experiences
Buffalo Mountain Brewery & McDaniel's Tavern	Shopping/Dining, Eatertainment and Adult Beverage Experiences
Pembroke Town Center	Shopping/Dining, Eatertainment and Adult Beverage Experiences
Bristol Motor Speedway	Sports
Lane Stadium	Sports
Pulaski County Sportsplex	Sports
Calfee Park	Sports
Wythe Raceway	Sports

Southwest Virginia: Blue Ridge Highlands

POI by Pillars

POI	PILLAR OF PLACE
Christiansburg Aquatic Center	Sports
Motor Mile Speedway	Sports
The Meadows Sports Complex	Sports
Harkrader Sports Complex	Sports
Hitachi Energy Arena	Sports



Lane Stadium at Virginia Tech

Southwest Virginia: Heart of Appalachia

POI by Pillars

POI	PILLAR OF PLACE
Historic Crab Orchard Museum	Arts and Culture
Carter Family Fold	Arts and Culture
Pocahontas Exhibition Coal Mine & Museum	Arts and Culture
High Knob Tower	Attractions and Gaming
Tri Cities Airport	Authentic Architecture and Public Space
Big Stone Gap Main Street	Authentic Architecture and Public Space
Wise Main Street	Authentic Architecture and Public Space
Bluefield Downtown	Authentic Architecture and Public Space
Downtown Tazewell	Authentic Architecture and Public Space
Daniel Boone Visitor Center	Authentic Architecture and Public Space
Saint Paul Downtown	Authentic Architecture and Public Space
Norton Main Street	Authentic Architecture and Public Space
Clintwood Main Street	Authentic Architecture and Public Space
Gate City Downtown (Kane St & E Jackson St)	Authentic Architecture and Public Space
Grundy Main Street	Authentic Architecture and Public Space
Haysi Main Street	Authentic Architecture and Public Space
Pennington Gap Morgan Avenue	Authentic Architecture and Public Space
Lebanon Main Street	Authentic Architecture and Public Space
Richlands Downtown	Authentic Architecture and Public Space
Dante Main Street	Authentic Architecture and Public Space
Jonesville Main Street	Authentic Architecture and Public Space
Inn at Wise	Hotels and Hospitality
Holiday Inn	Hotels and Hospitality
Tazewell County Hotels (Super 8, Holiday Inn)	Hotels and Hospitality
Norton City Hotels (Days Inn, Super 8, Econo Lodge etc.)	Hotels and Hospitality
Mountain View Trailhead	Recreation and Natural Environment
Breaks Interstate Park	Recreation and Natural Environment
Southern Gap Outdoor Adventure/Coal Canyon Trail	Recreation and Natural Environment
Natural Tunnel State Park	Recreation and Natural Environment
Daniel Boone Wilderness Trail	Recreation and Natural Environment
Spearhead Trails Stone Mountain Trailhead/Leeman Field Park	Recreation and Natural Environment
Flag Rock Recreation Area	Recreation and Natural Environment
The Original Pocahontas Trail	Recreation and Natural Environment
Spearhead Trail (Coeburn)	Recreation and Natural Environment
Trailhead ATV Resort at Boissevain Miner's Park	Recreation and Natural Environment
Burkes Garden	Recreation and Natural Environment
Fincastle Country Club	Recreation and Natural Environment
Spearhead Jawbone Trail	Recreation and Natural Environment
Wilderness Road State Park	Recreation and Natural Environment
High Knob Destination Center	Recreation and Natural Environment

Southwest Virginia: Heart of Appalachia POI by Pillars

POI	PILLAR OF PLACE
Clinch River State Park	Recreation and Natural Environment
Bullitt Park	Recreation and Natural Environment
Lincolnshire Park	Recreation and Natural Environment
Birch Knob Tower	Recreation and Natural Environment
Mountain Rose Vineyards	Shopping/Dining, Eatertainment and Adult Beverage Experiences
Palisades Restaurant	Shopping/Dining, Eatertainment and Adult Beverage Experiences
Cuz's Uptown Barbeque	Shopping/Dining, Eatertainment and Adult Beverage Experiences
Jonesville Main Street	Authentic Architecture and Public Space



Gap Caverns

Virginia Mountains POI by Pillars

POI	PILLAR OF PLACE
National D-Day Memorial	Arts and Culture
The Harrison Museum of African American Culture	Arts and Culture
Taubman Museum of Art	Arts and Culture
Poplar Forest	Arts and Culture
Salem Museum	Arts and Culture
Bower Center for the Arts	Arts and Culture
Grandin Theatre	Arts and Culture
Vinton War Memorial	Arts and Culture
Virginia Museum of Transportation	Arts and Culture
O. Winston Link Museum & History Museum of Western Virginia	Arts and Culture
Franklin County Speedway	Attractions and Gaming
Mill Mountain Star	Attractions and Gaming
Rosies Gaming Vinton	Attractions and Gaming
Mill Mountain Park and Zoo	Attractions and Gaming
Historic Masonic Theatre	Attractions and Gaming
Paint Bank Store	Attractions and Gaming
Bridgewater Marina & Boat Rentals	Authentic Architecture and Public Space
City Market Building	Authentic Architecture and Public Space
Salem Main Street	Authentic Architecture and Public Space
Bedford Historic District	Authentic Architecture and Public Space
Rocky Mount Historic District	Authentic Architecture and Public Space
Roanoke-Blacksburg Regional Airport	Authentic Architecture and Public Space
Fincastle Main Street	Authentic Architecture and Public Space
Humpback Bridge	Authentic Architecture and Public Space
Monterey Main Street	Authentic Architecture and Public Space
Downtown Vinton	Authentic Architecture and Public Space
Main Street Covington	Authentic Architecture and Public Space
Roanoke Amtrak Station	Authentic Architecture and Public Space
Downtown Clifton Forge	Authentic Architecture and Public Space
Virginia Welcome Center at Covington	Authentic Architecture and Public Space
Boones Mill Main Street	Authentic Architecture and Public Space
The Hotel Roanoke & Conference Center	Conventions and Conferences
Elmwood Park	Entertainment
Harvester Performance Center	Entertainment
The Omni Homestead	Hotels and Hospitality
The Inn at Cristmill Square	Hotels and Hospitality
Salem Hotels (Avid, Hampton)	Hotels and Hospitality
Roanoke / Hollins Hotels (Tru, Fairfield, Country Inn & Suites)	Hotels and Hospitality
Mariners Landing	Hotels and Hospitality
Troutville Hotels at I-81 & US-11	Hotels and Hospitality

Virginia Mountains POI by Pillars

POI	PILLAR OF PLACE
Peaks of Otter Lodge	Hotels and Hospitality
Gills Creek Marina Lodge	Hotels and Hospitality
Appalachian Trail Parking Troutville VA	Recreation and Natural Environment
Carvins Cove Recreation Area	Recreation and Natural Environment
Smith Mountain Lake State Park	Recreation and Natural Environment
Douthat State Park	Recreation and Natural Environment
Explore Park	Recreation and Natural Environment
McAfee Knob Trailhead	Recreation and Natural Environment
Dragons Tooth Trailhead	Recreation and Natural Environment
Peaks of Otter Trailhead parking lot	Recreation and Natural Environment
Upper James River Water Trail/Buchanan Park	Recreation and Natural Environment
Roaring Run Recreation Area	Recreation and Natural Environment
Ingalls Overlook and Trail	Recreation and Natural Environment
Potts Mountain Jeep Trail	Recreation and Natural Environment
Center In The Square	Shopping/Dining, Eatertainment and Adult Beverage Experiences
Old Salem Brewing Co	Shopping/Dining, Eatertainment and Adult Beverage Experiences
Mac and Bob's Restaurant	Shopping/Dining, Eatertainment and Adult Beverage Experiences
Twin Creeks Distillery	Shopping/Dining, Eatertainment and Adult Beverage Experiences
Jackson River Sports Complex	Sports
River's Edge Sports Complex	Sports
James I Moyer Sports Complex	Sports
Salem Civic Center	Sports
Salem Memorial Ballpark	Sports
Botetourt Sports Complex	Sports
Countryside Sportsplex	Sports



Omni Homestead

Industry Trends

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. 2. Relais & Châteaux restaurants – chef-led, small-scale dining experiences emphasizing provenance, storytelling, and exceptional service. 3. Aman Resorts – known for privacy, serenity, and highly personalized service in secluded, destination-driven settings. 	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.	Strong potential for boutique resort development, wellness-oriented lodging, and premium food experiences that can capture longer, higher-spend stays across Virginia.
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. 	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.	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.
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. 	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.	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.
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. 	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.	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.
"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. 	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.	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.

Industry Trends

TREND	BEST PRACTICE EXAMPLE	OVERVIEW	VA IMPLICATION
Technology Driving Bookings	<ol style="list-style-type: none"> AI-powered trip-planning chat tools enabling conversational, personalized itinerary building. AI-integrated travel search platforms that allow travelers to plan complete trips by asking questions rather than navigating filters. 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"> The quintessential California road trip experience. Route 66 Centennial-themed travel experiences. 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"> Multigenerational travel destinations such as Outer Banks, NC and Hilton Head, SC. All-inclusive experiential resorts like Mohonk Mountain House, NY. 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"> Vacations by Marriott last-minute deals offering time-sensitive discounts. American Airlines featured and last-minute fare promotions targeting near-term travel decisions. 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>
Wellness Travel Goes Mainstream	<ol style="list-style-type: none"> Canyon Ranch (Multiple locations) Miraval Resorts (Multiple locations) Nordic spa developments across the U.S. 	<p>Wellness travel has expanded from niche spa trips into a mainstream motivator encompassing mental health, stress reduction, sleep quality, movement, and nature immersion. Travelers increasingly seek destinations that support balance and restoration as part of everyday life, not just luxury indulgence.</p>	<p>Virginia can integrate wellness across its tourism ecosystem by embedding wellness programming into outdoor recreation, food systems, lodging, and historic retreats. Opportunities include retreats, wellness weekends, spa-adjacent lodging, and partnerships with health-focused operators.</p>
Nature as a Core Experience	<ol style="list-style-type: none"> National park–focused itineraries Dark-sky destinations Forest bathing programs 	<p>Nature is increasingly the primary reason for travel rather than a supporting amenity. Travelers associate access to natural environments with mental health, authenticity, and value, and are seeking destinations where nature is easy to access, interpret, and experience safely.</p>	<p>Virginia’s parks, trails, waterways, and scenic regions should be positioned as trip anchors, supported by guided access, interpretation, and amenities. Strengthening infrastructure and storytelling around nature can extend stays and distribute visitation.</p>

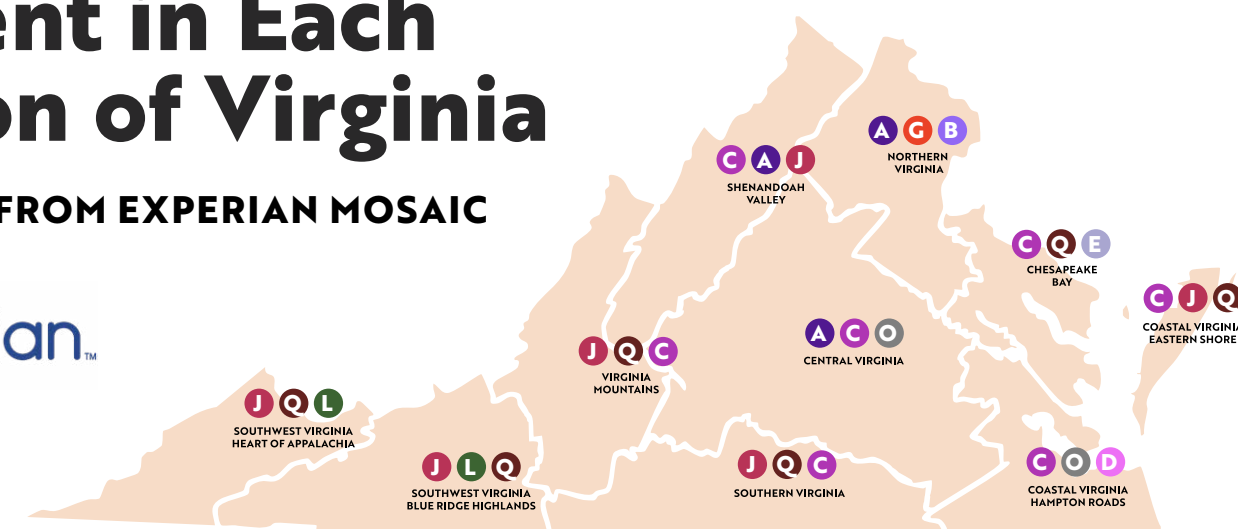
TREND	BEST PRACTICE EXAMPLE	OVERVIEW	VA IMPLICATION
Regenerative Tourism	<ol style="list-style-type: none"> New Zealand’s Tiaki Promise Hawaii’s Mālama programs Community-led conservation tourism 	<p>Regenerative tourism emphasizes leaving destinations better than they were found, benefiting ecosystems and communities. Travelers increasingly want tangible ways to contribute positively, moving beyond passive sustainability toward active participation.</p>	<p>Virginia can align tourism growth with conservation and community goals by supporting stewardship programs, volunteer tourism, and partnerships that connect visitors to preservation, workforce development, and local benefit initiatives.</p>
Food as a Travel Motivator	<ol style="list-style-type: none"> Charleston, SC culinary positioning Napa Valley food and wine experiences Regional food trails 	<p>Culinary experiences are now a primary driver of destination choice. Travelers seek authenticity, local sourcing, and storytelling through food, often planning trips around dining, beverages, and food-based experiences.</p>	<p>Virginia’s wine regions, seafood traditions, barbecue, and farm-to-table culture can anchor itineraries, extend seasons, and support rural economies when packaged into trails, events, and immersive experiences.</p>
Event-Led Travel Growth	<ol style="list-style-type: none"> Formula 1 host cities Concert-driven travel Sports tournaments and festivals 	<p>Events increasingly drive short-notice travel and destination awareness. Limited-time experiences create urgency and give travelers a clear reason to visit now rather than later.</p>	<p>Virginia can leverage festivals, sporting events, and cultural programming to stimulate off-peak and shoulder-season demand, particularly when paired with lodging and regional itineraries.</p>
Season Extension Strategies	<ol style="list-style-type: none"> Shoulder-season promotional campaigns Winter festivals in mountain towns Off-season experience packaging 	<p>Destinations are actively working to spread visitation beyond peak periods to improve sustainability, workforce stability, and infrastructure utilization. Experience-based programming is key to motivating off-peak travel.</p>	<p>Virginia can activate shoulder seasons through thematic programming, bundled experiences, and targeted marketing that highlights seasonal assets rather than traditional peak messaging.</p>
Remote Work & Work-from-Anywhere Travel	<ol style="list-style-type: none"> Vermont remote worker incentives Tulsa Remote Extended-stay destinations 	<p>Flexible work arrangements allow travelers to blend work and leisure, resulting in longer stays and weekday travel. This trend supports deeper engagement with destinations and more consistent visitation patterns.</p>	<p>Virginia destinations can attract longer stays by promoting connectivity, extended-stay lodging, coworking access, and midweek experiences that appeal to remote workers and blended travelers.</p>
Multigenerational & “Skip-Gen” Travel	<ol style="list-style-type: none"> National park family trips Beach destinations Resort-based family experiences 	<p>Families are traveling across generations, often prioritizing shared experiences and educational value. Destinations must offer diverse activities that appeal to different ages and mobility levels.</p>	<p>Virginia’s mix of history, outdoor recreation, food, and entertainment supports multigenerational itineraries. Packaging experiences by age interest and accessibility can strengthen this segment.</p>
Pet-Friendly Travel	<ol style="list-style-type: none"> Pet-inclusive lodging brands Outdoor-oriented towns Dog-friendly destinations 	<p>Pets increasingly influence travel decisions as travelers seek destinations where animals are welcomed rather than accommodated as an afterthought.</p>	<p>Virginia can differentiate by promoting pet-friendly lodging, trails, outdoor dining, and events, particularly in drive markets where travelers bring pets.</p>
Small-Group & Micro-Tour Experiences	<ol style="list-style-type: none"> Small-group cultural tours Guided food and history walks Limited-capacity adventure trips 	<p>Travelers favor intimate group sizes that feel exclusive, flexible, and socially comfortable. Smaller groups also support deeper learning and higher-quality experiences.</p>	<p>Supporting local guides and small operators can expand Virginia’s experience economy while preserving authenticity and managing visitor impact.</p>

Industry Trends

TREND	BEST PRACTICE EXAMPLE	OVERVIEW	VA IMPLICATION
Heritage & Legacy Travel	<ol style="list-style-type: none"> 1. Ancestry-driven travel 2. Civil rights trails 3. Historic preservation tourism 	Travelers seek personal connections to history, ancestry, and identity through travel. This includes both celebratory and reflective experiences tied to heritage and place.	Virginia's deep historical assets can support curated heritage routes, ancestry-focused itineraries, and inclusive storytelling that broadens appeal and relevance.
Accessible & Inclusive Travel	<ol style="list-style-type: none"> 1. ADA-forward destinations 2. Sensory-friendly attractions 3. Inclusive hospitality standards 	Accessibility and inclusion are becoming baseline expectations rather than niche offerings. Inclusive design benefits all travelers while expanding market reach.	Investing in accessible infrastructure, inclusive programming, and staff training improves visitor experience and positions Virginia as a welcoming destination for all.
Digital Nomad-Friendly Destinations	<ol style="list-style-type: none"> 1. Asheville, NC 2. Bend, OR 3. Boise, ID 	Destinations offering lifestyle amenities, culture, affordability, and connectivity attract longer-stay visitors and repeat visitation.	Virginia can position select regions as lifestyle destinations by aligning tourism, housing, and community amenities that support extended stays.
Experiential Retail & Local Markets	<ol style="list-style-type: none"> 1. Artisan markets 2. Makers districts 3. Cultural retail corridors 	Retail is shifting toward experiential models that emphasize local makers, storytelling, and interaction. These spaces often anchor downtown revitalization.	Supporting markets and maker districts can strengthen local economies, enhance downtown vitality, and create memorable visitor touchpoints.
Transportation-Led Tourism	<ol style="list-style-type: none"> 1. Scenic rail journeys 2. Ferry-based destinations 3. Bikeable cities 	How travelers move through a destination is increasingly part of the experience, not just a means of access.	Virginia can enhance scenic byways, rail access, cycling routes, and water-based transportation to create experience-driven mobility.
Film & Screen Tourism	<ol style="list-style-type: none"> 1. Film location trails 2. TV-series-driven visitation 3. Studio tourism 	Film and television exposure can significantly influence destination awareness and visitation, often long after release.	Virginia can leverage film locations and production history through itineraries, marketing, and partnerships with the film industry.
Rural Tourism Revival	<ol style="list-style-type: none"> 1. Agritourism regions 2. Farm stays 3. Rural craft trails 	Travelers are rediscovering rural destinations for authenticity, space, and connection to land and community.	Virginia's rural regions can benefit from agritourism, craft trails, and experiential stays that diversify local economies.
Education & Learning Travel	<ol style="list-style-type: none"> 1. Skill-based workshops 2. Cultural immersion programs 3. History-focused travel 	Learning-driven travel appeals to travelers seeking enrichment and personal growth, particularly among Gen Z and older audiences.	Virginia's educational institutions, museums, and cultural organizations can support immersive learning experiences that extend stays and deepen engagement.
Data-Driven Destination Marketing	<ol style="list-style-type: none"> 1. Personalized marketing platforms 2. Predictive demand tools 3. CRM-driven DMOs 	Destinations increasingly rely on data to target audiences, optimize spend, and adapt to demand shifts in real time.	VTC and partners can improve marketing efficiency and product alignment through data-informed decision-making and performance tracking.
Climate-Conscious Travel Decisions	<ol style="list-style-type: none"> 1. Low-impact itineraries 2. Regional travel substitution 3. Carbon-aware travel planning 	Travelers are increasingly factoring environmental impact into travel choices, favoring closer-to-home and lower-impact experiences.	Virginia's drive-market strength and regional accessibility position it well for climate-conscious messaging and lower-impact product development.

Top Segments Present in Each Region of Virginia

SEGMENTS FROM EXPERIAN MOSAIC



- A Power Elite (A):** Wealthiest households in elite neighborhoods, led by highly educated professionals with major assets and luxury lifestyles. Heavy spenders on premium goods, travel, culture, and philanthropy, shaping some of the most influential consumer behavior in the U.S.
- B Flourishing Families (B):** Affluent, middle-aged families and couples earning prosperous incomes and living very comfortable, active lifestyles.
- C Booming with Confidence (C):** Affluent, peak-earning suburban couples with dual incomes and long-term homeownership, enjoying comfortable, cultured lifestyles and strong financial stability.
- D Suburban Style (D):** Diverse, middle-aged families in comfortable suburban homes, balancing child-rearing and mid-level careers. Solid incomes and active lifestyles drive steady spending on family activities, tech, and everyday conveniences.
- E Thriving Boomers (E):** Empty-nesting couples in their 50s and 60s with long-term homeownership, solid white-collar careers, and above-average incomes. Active, practical, and travel-oriented lifestyles define this financially stable, retirement-ready group.
- G Young City Solos (G):** Younger and middle-aged singles in major cities with high incomes, urban lifestyles, and active social routines. Well-educated, tech-savvy, and heavy consumers of dining, nightlife, and modern conveniences.
- J Autumn Years (J):** Older, long-settled couples – mostly over 65 – living modest, stable lifestyles in longtime suburban and rural homes. Household incomes are mid-range, leisure is home-centered, and brand loyalty and traditional habits shape their everyday routines.
- L Blue Sky Boomers (L):** Older, empty-nesting singles and couples living in modest homes across small towns and waterfront communities, with working-class incomes and relaxed, outdoor-focused lifestyles. Price-sensitive, traditional, and late adopters, they favor local shopping, conservative media habits, and steady, low-key routines.
- O Singles and Starters (O):** Young, mostly single adults under 35 living in low-cost apartments in small and college-adjacent cities, building early careers and highly mobile lifestyles. Social, style-conscious, and active consumers, they split time between nightlife, fitness, and affordable fashion while pursuing upward mobility.
- Q Golden Year Guardians (Q):** America's oldest households, mostly over 65, living on modest retirement incomes in long-held homes or Sun Belt senior communities. Tech-averse, brand-loyal, and rooted in simple, home-centered routines, they rely heavily on traditional media and maintain strong ties to churches and local community groups.

Statewide Survey Results

Q: PLEASE TELL US WHAT TYPE OF BUSINESS OR ORGANIZATION YOU REPRESENT

	Responses %
DMO/Tourism Agency/Sports Commission	14.54%
Museum/Arts & Cultural Organization and Asset	12.59%
Craft Beverage (Brewery, Winery, Distillery)	11.90%
City/County/State Official	10.46%
Retail/Restaurant	9.44%
Entertainment/Attraction	7.14%
Chamber of Commerce/Economic Development Agency	5.70%
Hotel	4.76%
Short Term Rental	3.49%
Outdoor Recreation	3.23%
Bed & Breakfast Inn	2.72%
Sports Facility	1.53%
Transportation	1.19%
Guide Service/Outfitter	1.11%
Real Estate Service	1.11%
Resort	0.94%
Other	8.16%



Central Virginia Regional Survey Results

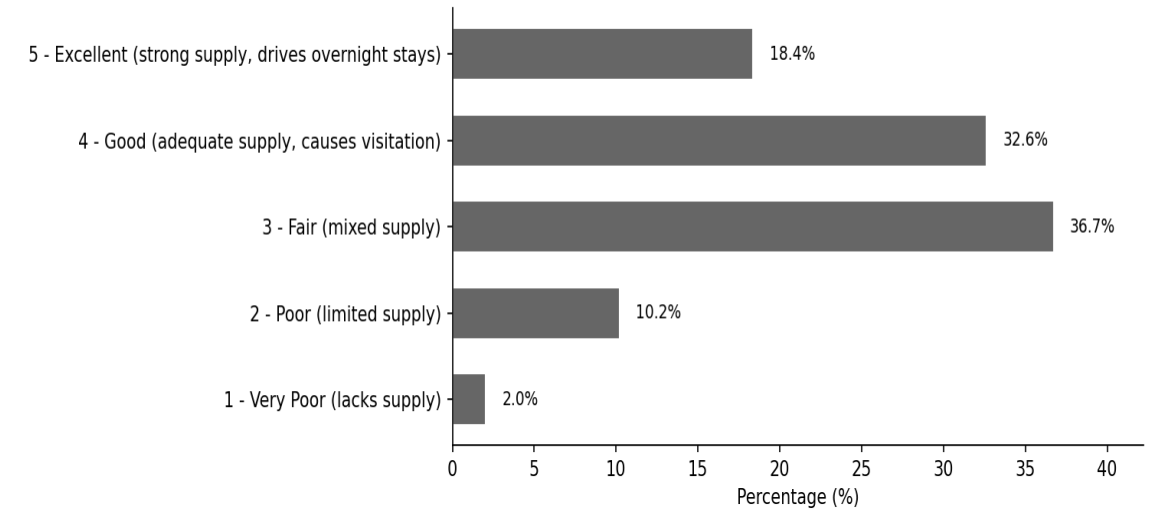
Q: WORDS THAT COME TO MIND ABOUT THE REGION

Respondents were asked to provide three words or phrases that come to mind when thinking of the region.



Q: RATING OF CURRENT TOURISM ASSETS

Stakeholders rated the region's current tourism assets on a scale of 1-5 for attracting visitors.



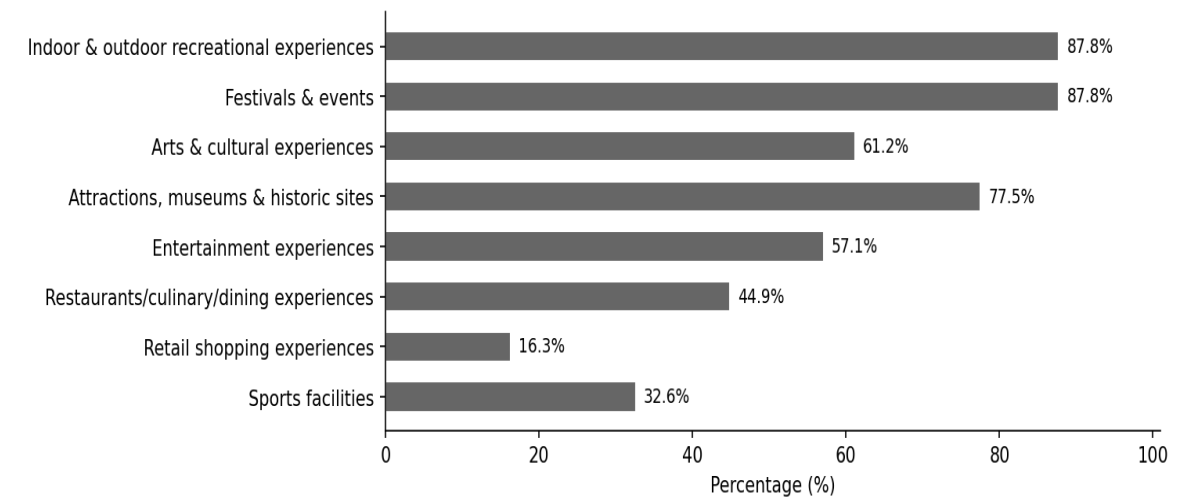
Q: TOP THINGS TO SEE OR RECOMMEND

When friends and family visit, these are the top experiences stakeholders recommend.



Q: ASSETS MOST LIKELY TO DRIVE VISITATION

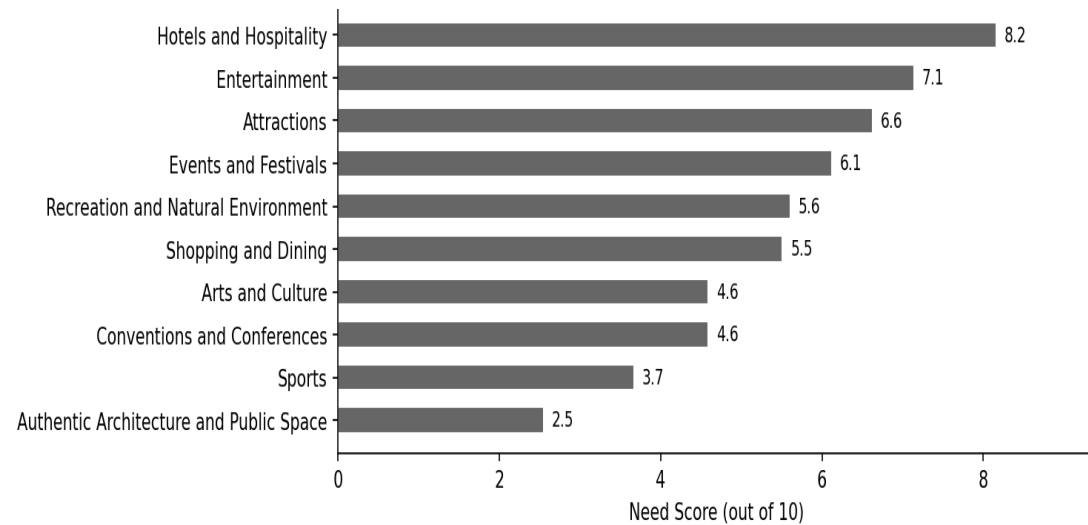
This chart shows asset categories rated as 'Very Likely' or 'Likely' to drive visitation.



Central Virginia Regional Survey Results

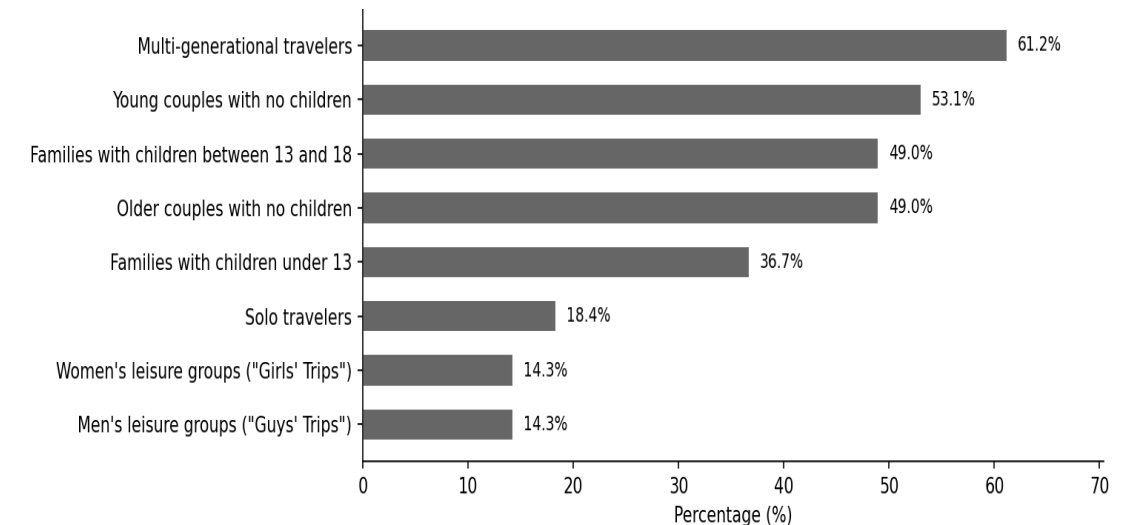
Q: TOURISM ASSETS NEEDED TO ATTRACT MORE VISITORS

Stakeholders ranked what assets the region needs most to increase competitiveness.



Q: LEISURE MARKET SEGMENTS WITH GREATEST GROWTH POTENTIAL

Stakeholders selected the top three market segments with the most potential for growth.



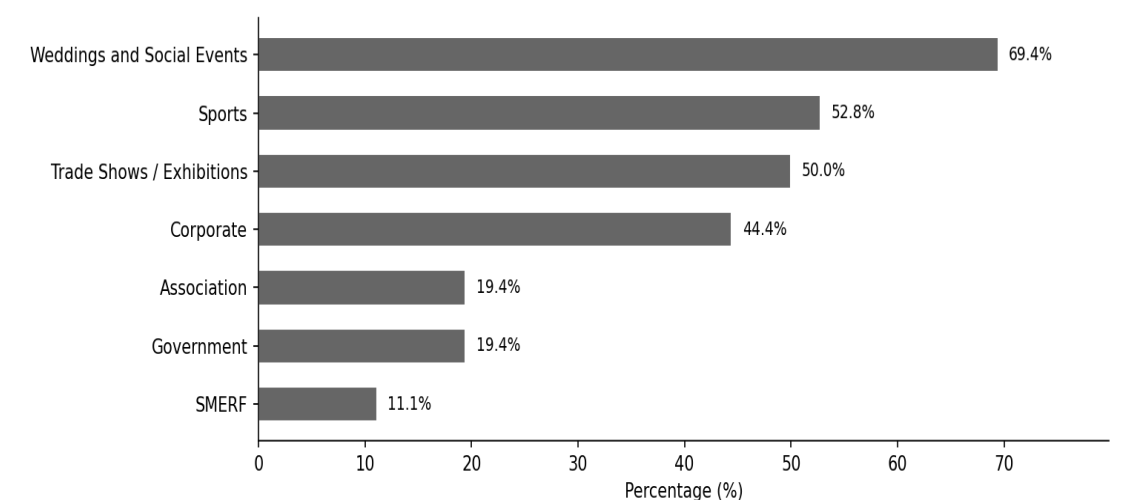
Q: WHAT THE REGION IS MISSING

Open-ended responses about what the region lacks from a tourism product standpoint.



Q: GROUP BUSINESS EXPANSION

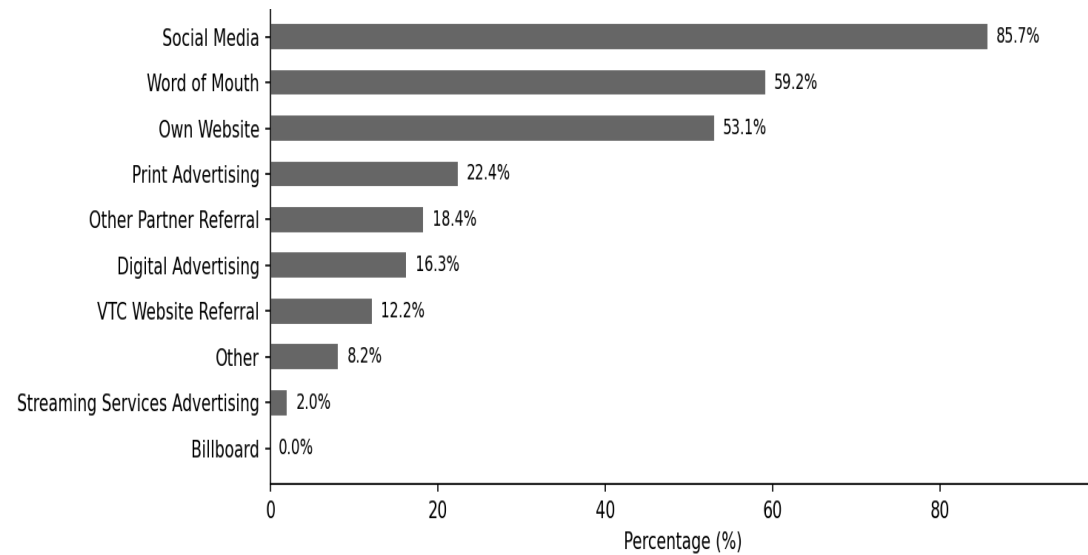
80.18% of respondents indicated the region should expand its offerings for group business. Among those who supported expansion, the following segments were identified as having the greatest potential:



Central Virginia Regional Survey Results

Q: HOW VISITORS ARE FINDING YOUR BUSINESS

Stakeholders identified the top three ways visitors discover their businesses.



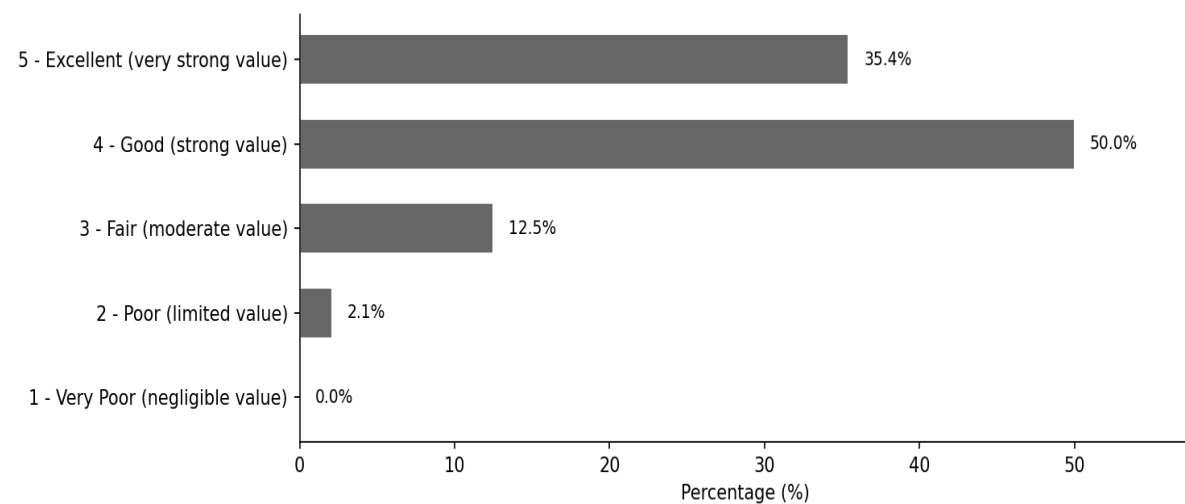
Q: LEVEL OF REGIONAL COLLABORATION

Stakeholders assessed the current level of collaboration and partnerships in the region.



Q: VALUE OF ADDITIONAL REGIONAL ITINERARIES

Stakeholders rated the potential value of developing additional regional itineraries.



Q: STAKEHOLDER PERSPECTIVE

“Our events thrive thanks to the invaluable support of sponsors and volunteers, and large-scale events would not be possible without these collaborations. However, when working with our DMO, we often see more emphasis placed on new events, while long-standing, successful events like ours can feel overlooked. This presents a missed opportunity to highlight proven events and leverage their reputations to drive visitation.”

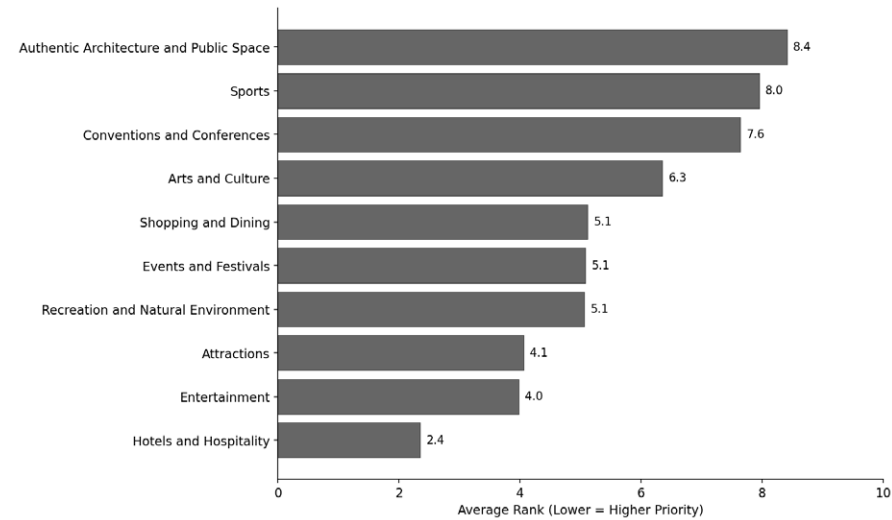
— Stakeholder, Central Virginia Region



Chesapeake Bay Regional Survey Results

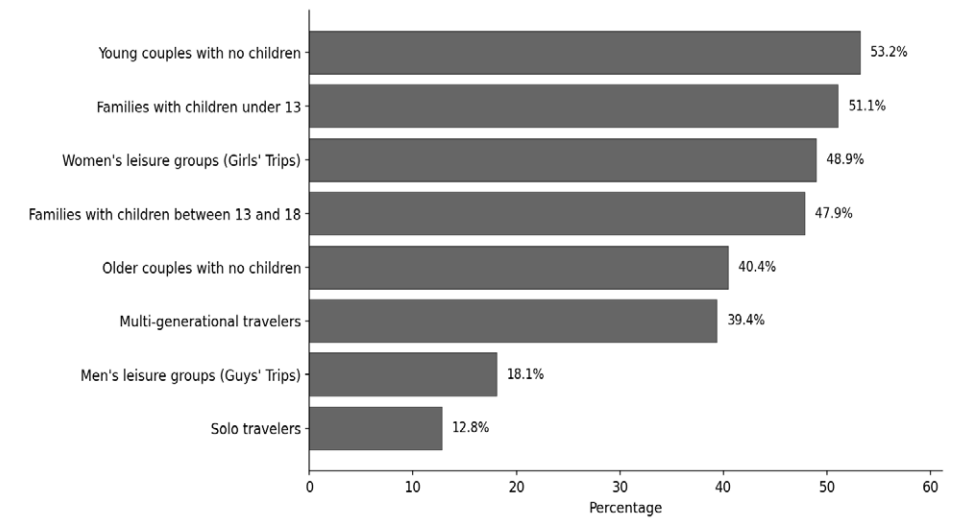
Q: TOURISM ASSETS NEEDED TO ATTRACT MORE VISITORS

Stakeholders ranked what assets the region needs most to increase competitiveness.



Q: LEISURE MARKET SEGMENTS WITH GREATEST GROWTH POTENTIAL

Stakeholders selected the top three market segments with the most potential for growth.



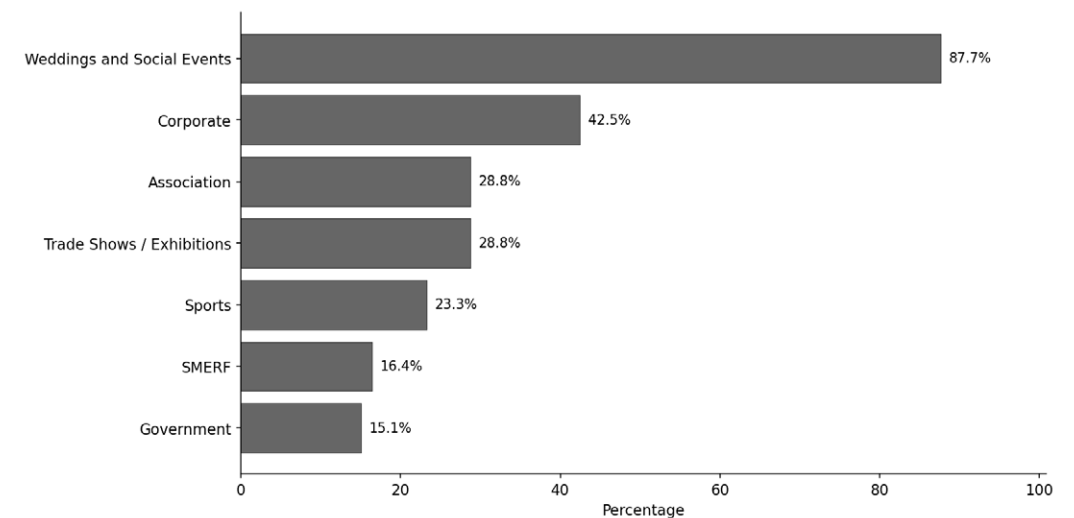
Q: WHAT THE REGION IS MISSING

Open-ended responses about what the region lacks from a tourism product standpoint.



Q: GROUP BUSINESS EXPANSION

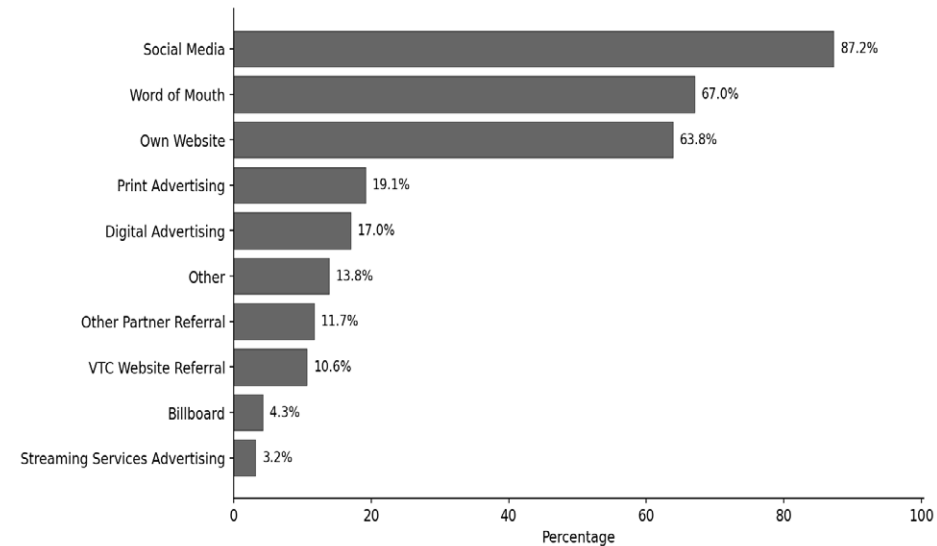
78.72% of respondents indicated the region should expand its offerings for group business. Among those who supported expansion, Weddings and Social Events was identified as having the greatest potential:



Chesapeake Bay Regional Survey Results

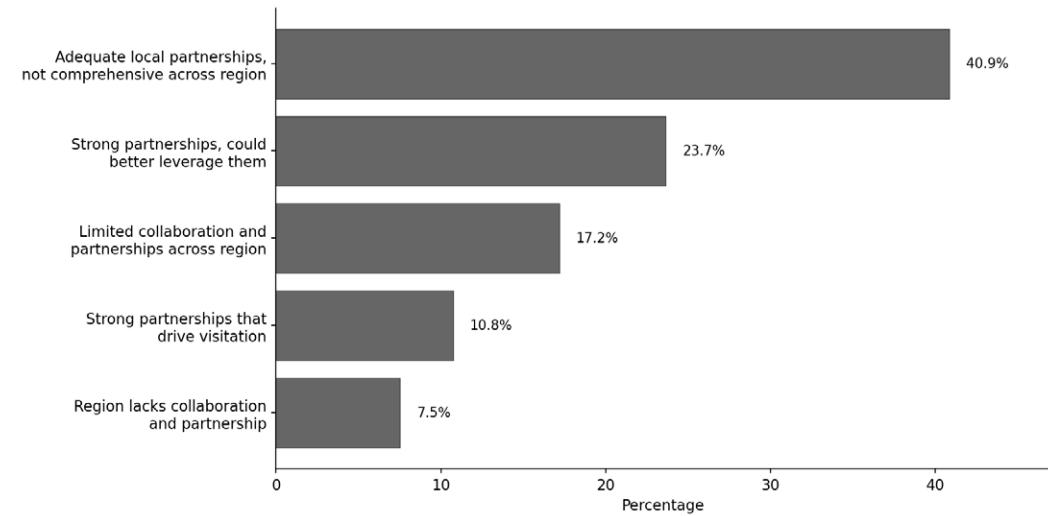
Q: HOW VISITORS ARE FINDING YOUR BUSINESS

Stakeholders identified the top three ways visitors discover their businesses.



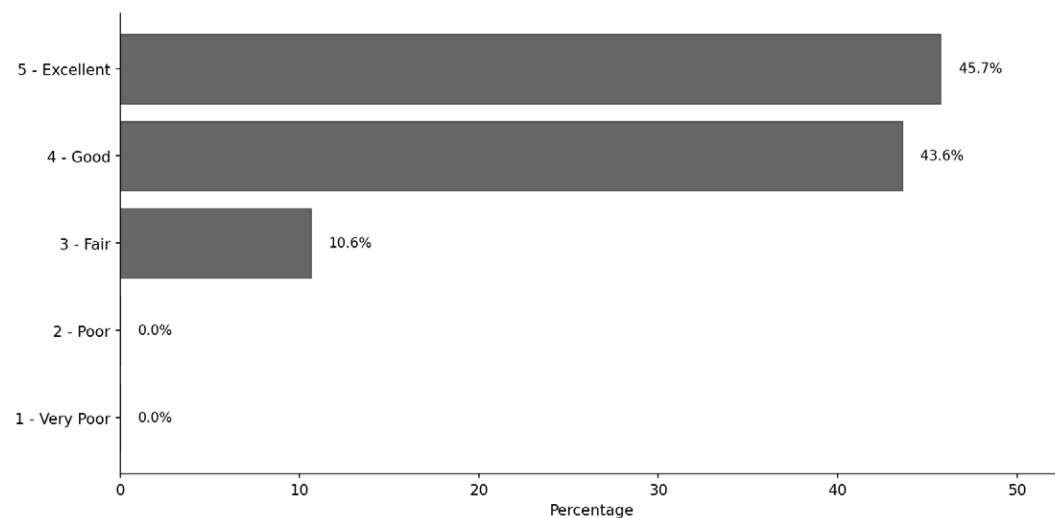
Q: LEVEL OF REGIONAL COLLABORATION

Stakeholders assessed the current level of collaboration and partnerships in the region.



Q: VALUE OF ADDITIONAL REGIONAL ITINERARIES

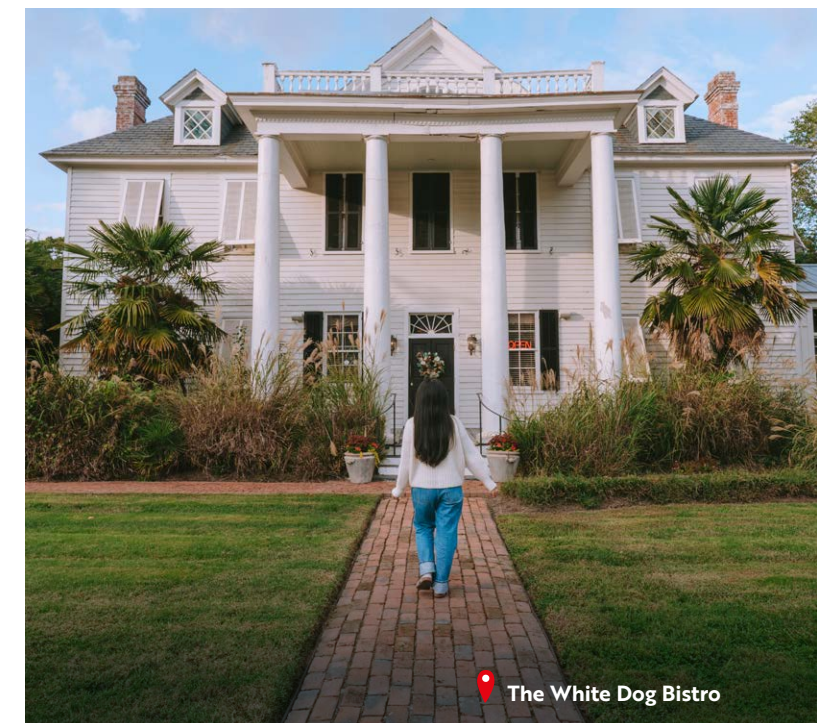
Stakeholders rated the potential value of developing additional regional itineraries.



Q: STAKEHOLDER PERSPECTIVE

Yes — our region demonstrates a strong level of collaboration from our local stakeholders, thanks in large part to the collaborative power of Virginia's River Realm, which unites Lancaster, Middlesex, and the Town of Tappahannock across nine small towns. This partnership has proven effective through joint participation in VTC grants, growing brand awareness at the local government, tourism, economic development, and small business levels, and driving measurable impact in overnight stays and visitor spending."

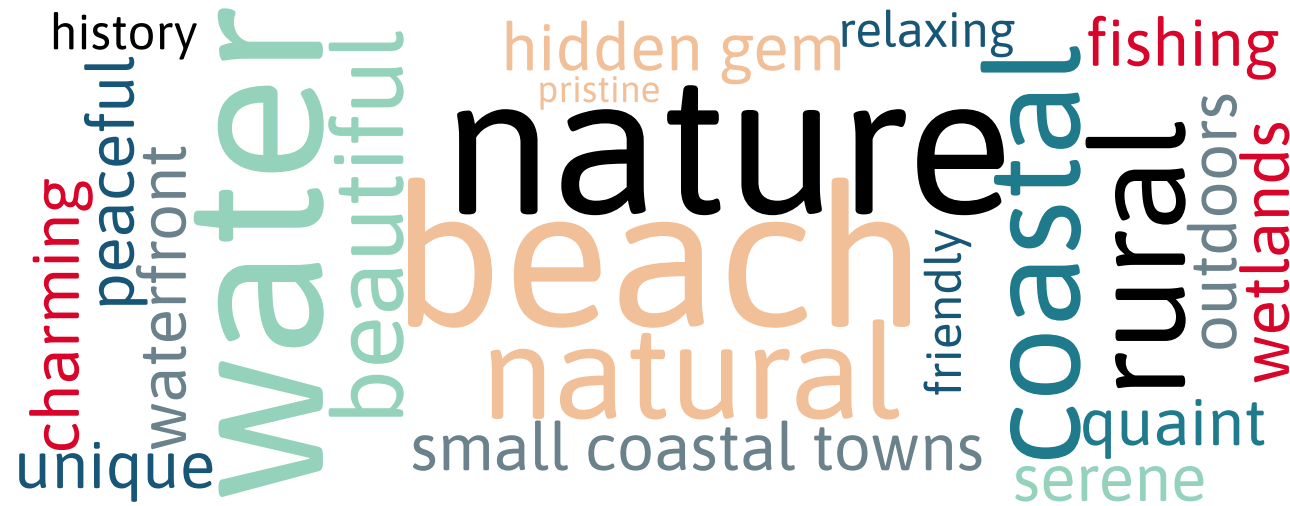
— Stakeholder, Chesapeake Bay Region



Coastal Virginia: Eastern Shore Regional Survey Results

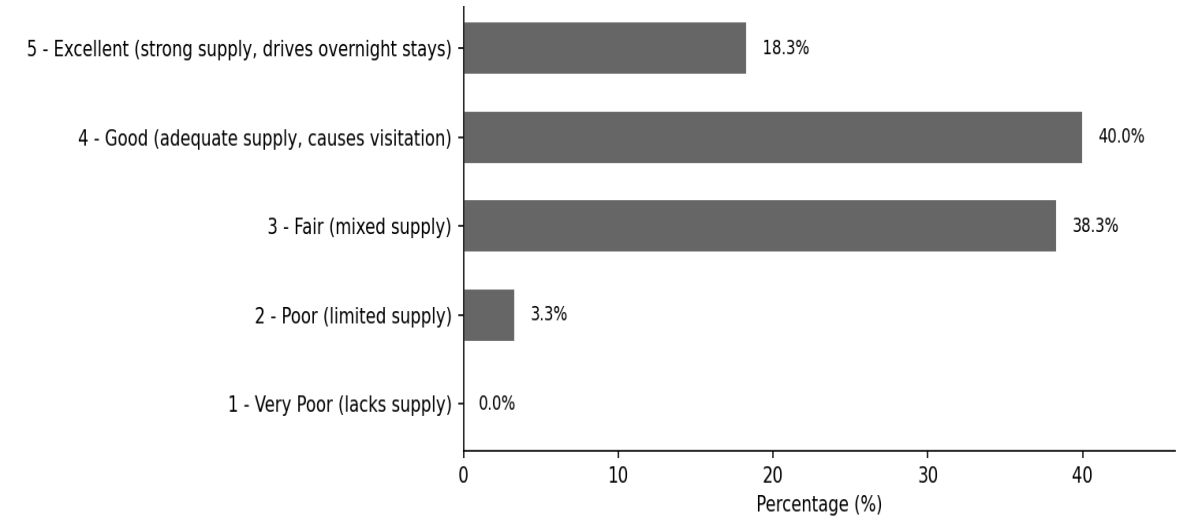
Q: WORDS THAT COME TO MIND ABOUT THE REGION

Respondents were asked to provide three words or phrases that come to mind when thinking of the region.



Q: RATING OF CURRENT TOURISM ASSETS

Stakeholders rated the region's current tourism assets on a scale of 1-5 for attracting visitors.



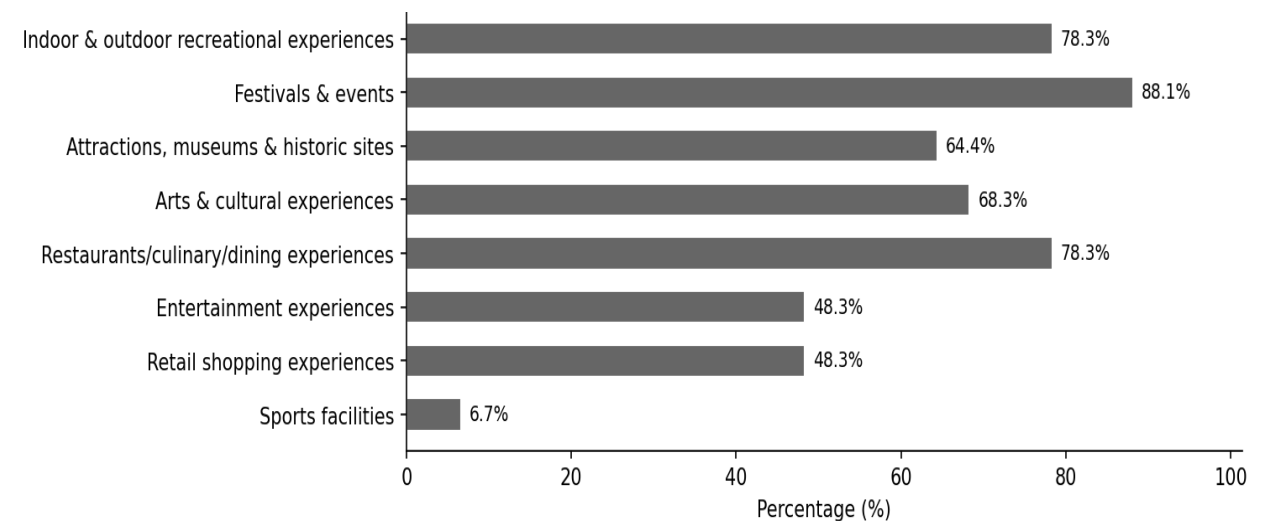
Q: TOP THINGS TO SEE OR RECOMMEND

When friends and family visit, these are the top experiences stakeholders recommend.



Q: ASSETS MOST LIKELY TO DRIVE VISITATION

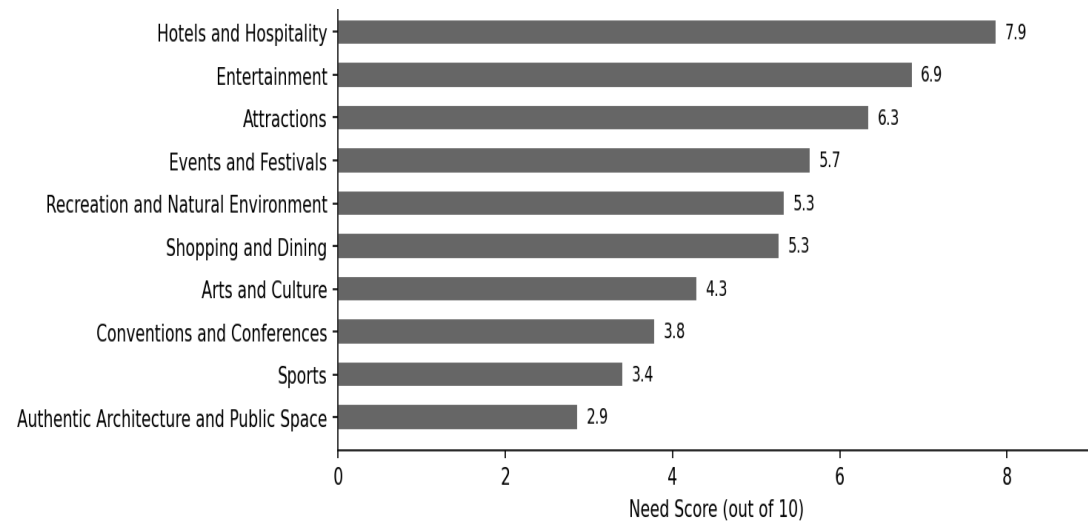
This chart shows asset categories rated as 'Very Likely' or 'Likely' to drive visitation.



Coastal Virginia: Eastern Shore Regional Survey Results

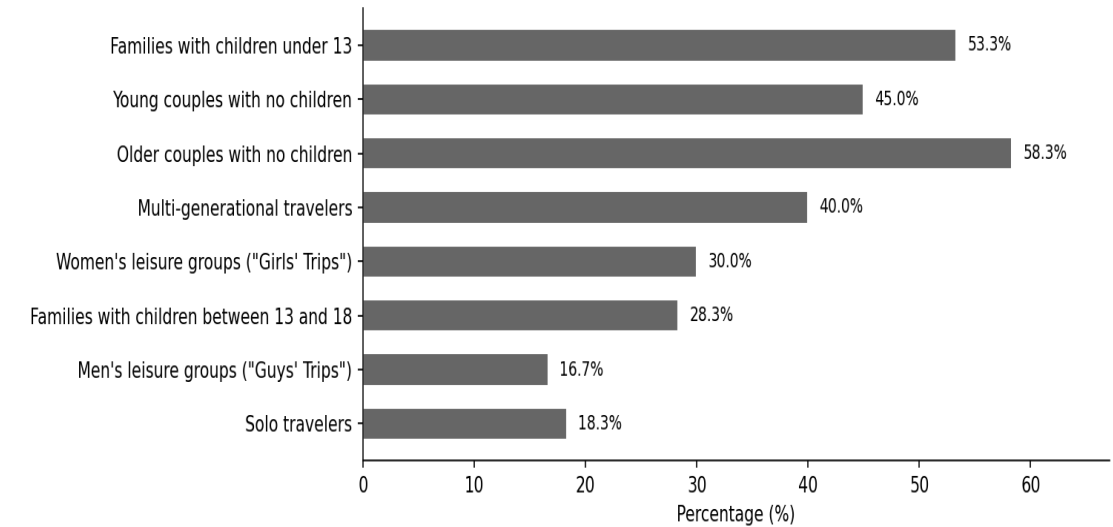
Q: TOURISM ASSETS NEEDED TO ATTRACT MORE VISITORS

Stakeholders ranked what assets the region needs most to increase competitiveness.



Q: LEISURE MARKET SEGMENTS WITH GREATEST GROWTH POTENTIAL

Stakeholders selected the top three market segments with the most potential for growth, indicating strong opportunities in young professional, multi-generational, and established adult markets.



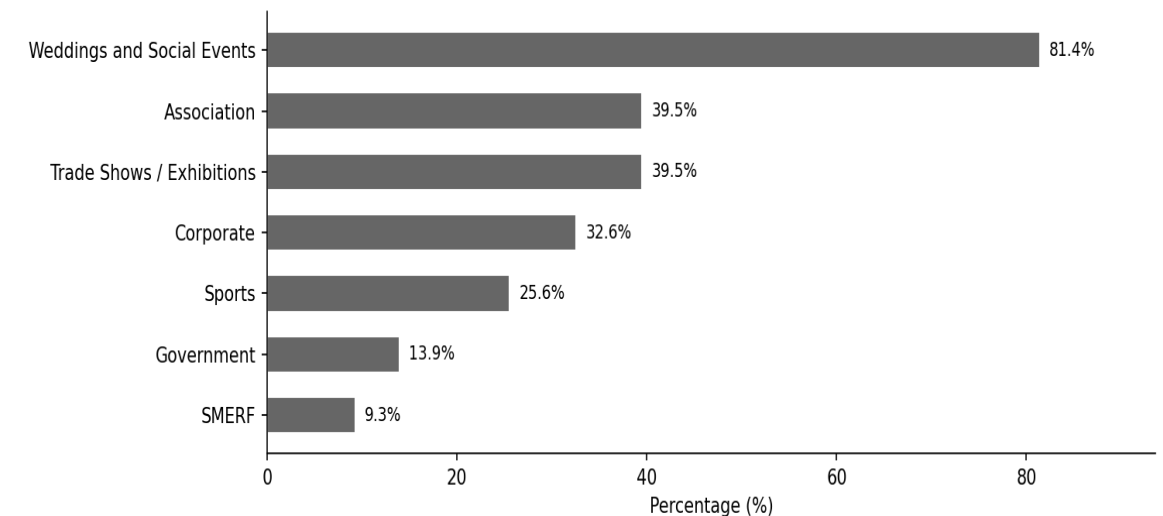
Q: WHAT THE REGION IS MISSING

Open-ended responses about what the region lacks from a tourism product standpoint. Hotels and lodging were the most frequently cited needs.



Q: GROUP BUSINESS EXPANSION

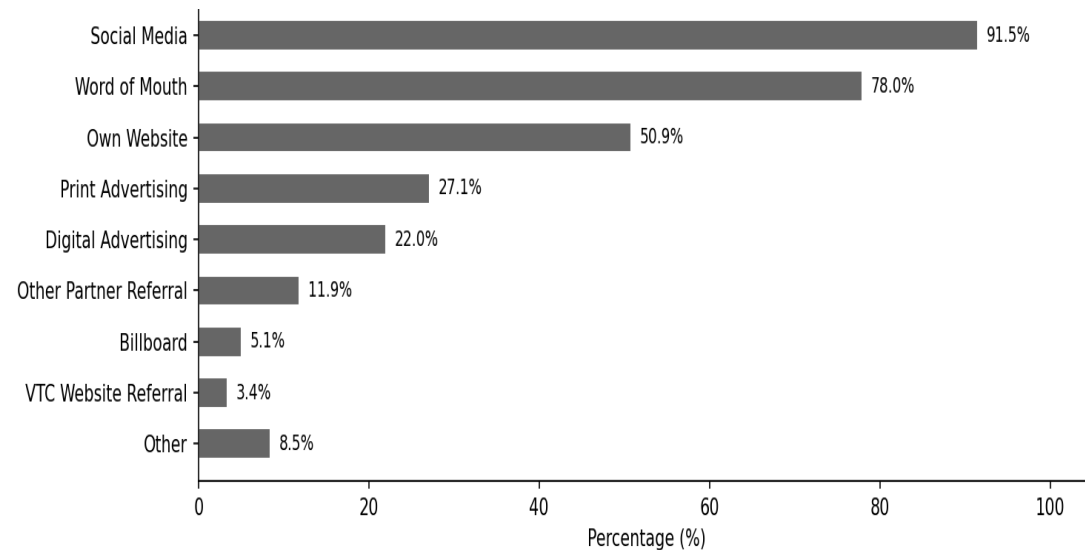
74.55% of respondents indicated the region should expand its offerings for group business. Among those who supported expansion, the following segments were identified as having the greatest potential:



Coastal Virginia: Eastern Shore Regional Survey Results

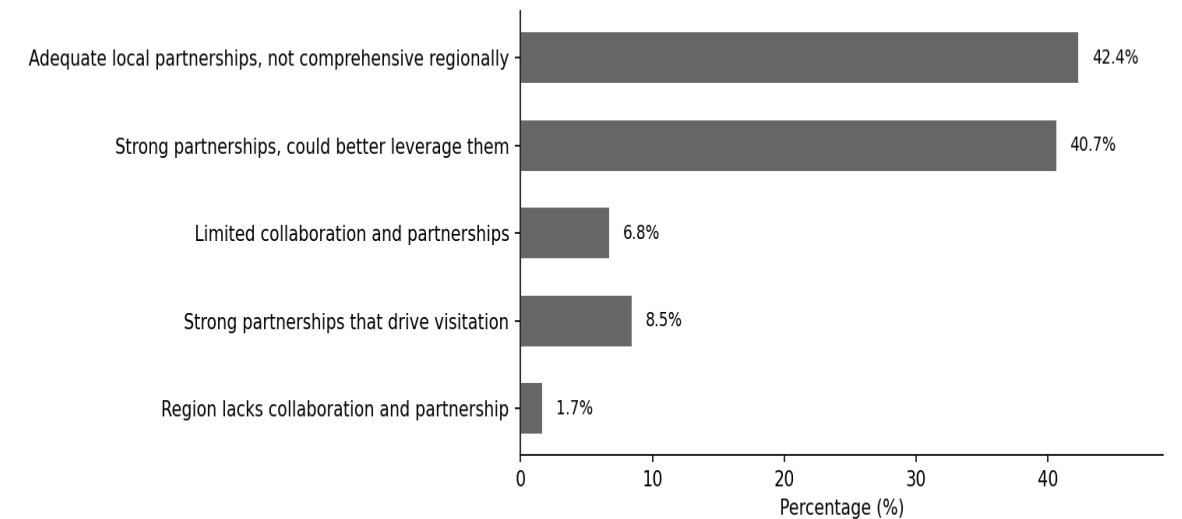
Q: HOW VISITORS ARE FINDING YOUR BUSINESS

Stakeholders identified the top three ways visitors discover their businesses.



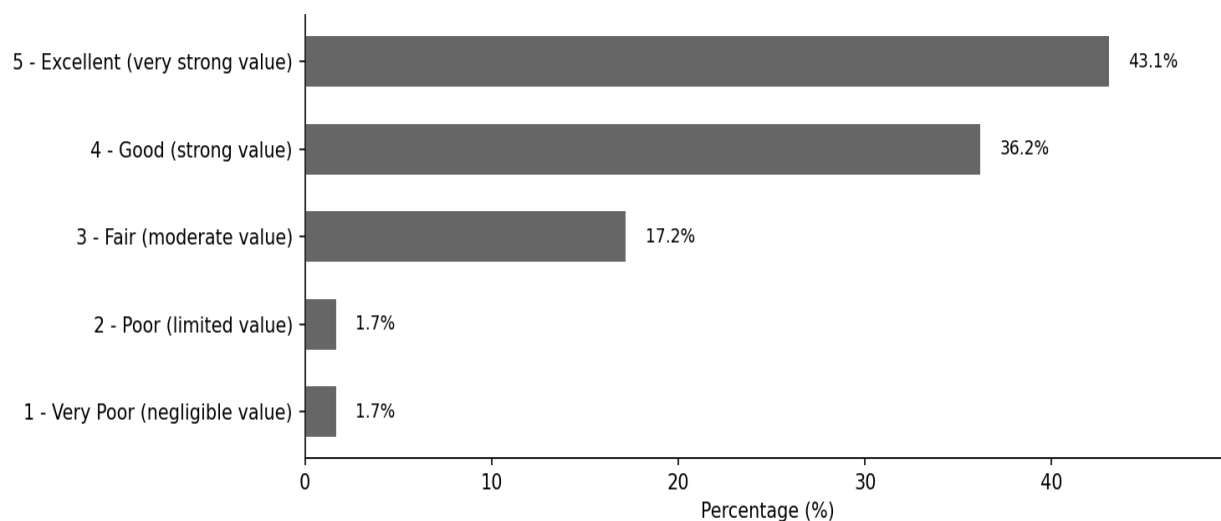
Q: LEVEL OF REGIONAL COLLABORATION

Stakeholders assessed the current level of collaboration and partnerships in the region.



Q: VALUE OF ADDITIONAL REGIONAL ITINERARIES

Stakeholders rated the potential value of developing additional regional itineraries.



Q: STAKEHOLDER PERSPECTIVE

“We have a tight knit community that works well together to promote tourism. The state and local resources are great. With better participation through topical meetings and networking opportunities, shared messaging, seasonal themes, bundled offers, we could offer visitors a more connected and compelling experience. The interest and talent are here.”
— Stakeholder, Eastern Shore Region



Coastal Virginia: Hampton Roads Regional Survey Results

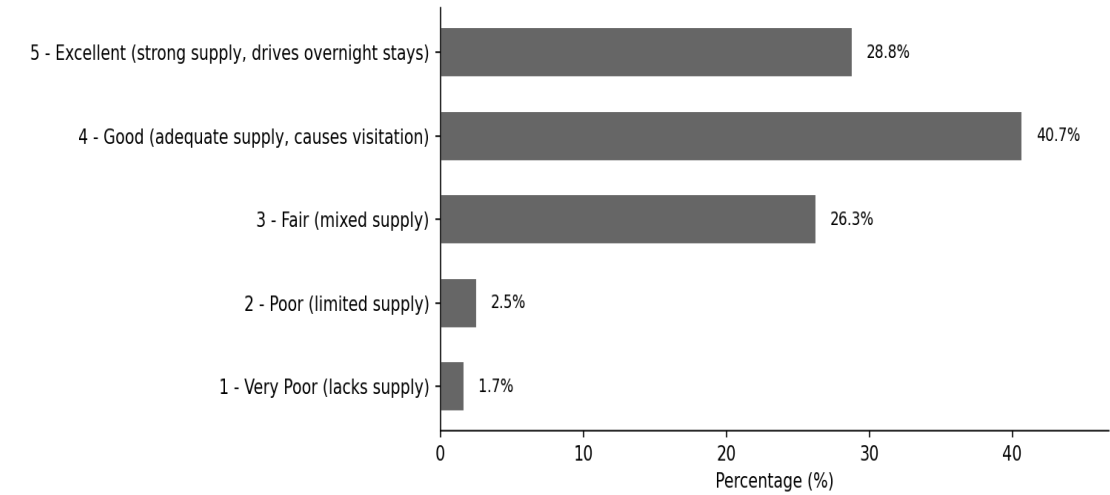
Q: WORDS THAT COME TO MIND ABOUT THE REGION

Respondents were asked to provide three words or phrases that come to mind when thinking of the region.



Q: RATING OF CURRENT TOURISM ASSETS

Stakeholders rated the region's current tourism assets on a scale of 1-5 for attracting visitors.



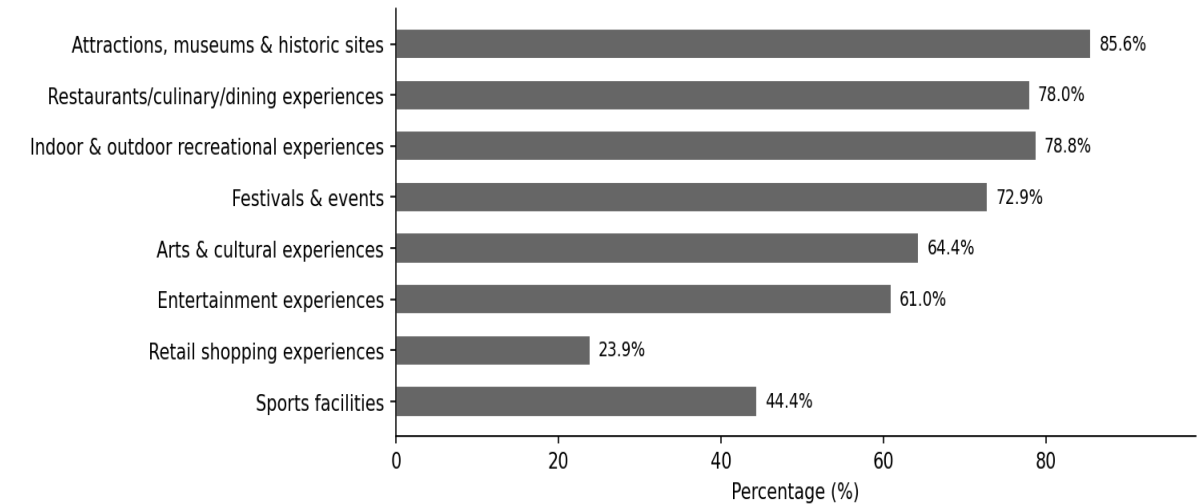
Q: TOP THINGS TO SEE OR RECOMMEND

When friends and family visit, these are the top experiences stakeholders recommend.



Q: ASSETS MOST LIKELY TO DRIVE VISITATION

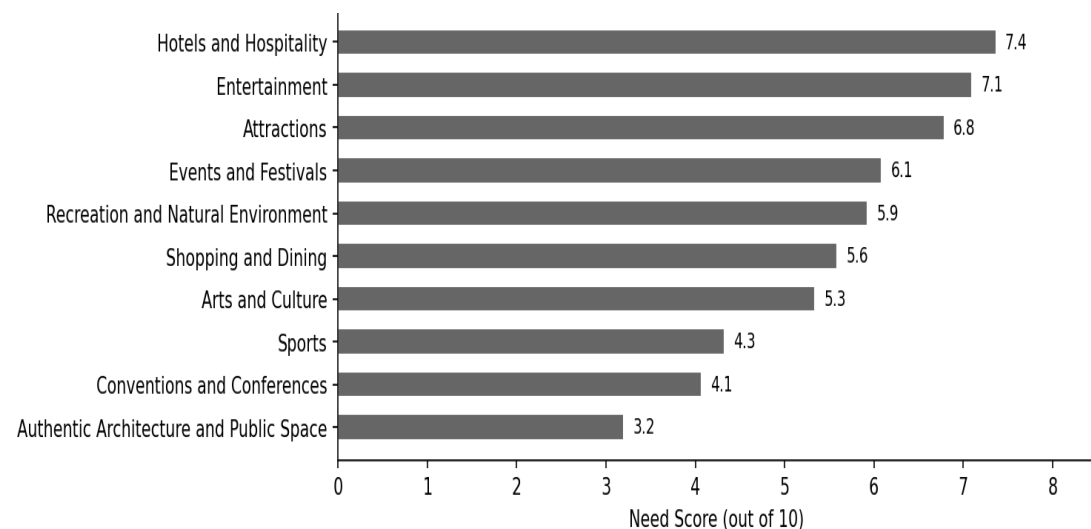
This chart shows asset categories rated as 'Very Likely' or 'Likely' to drive visitation.



Coastal Virginia: Hampton Roads Regional Survey Results

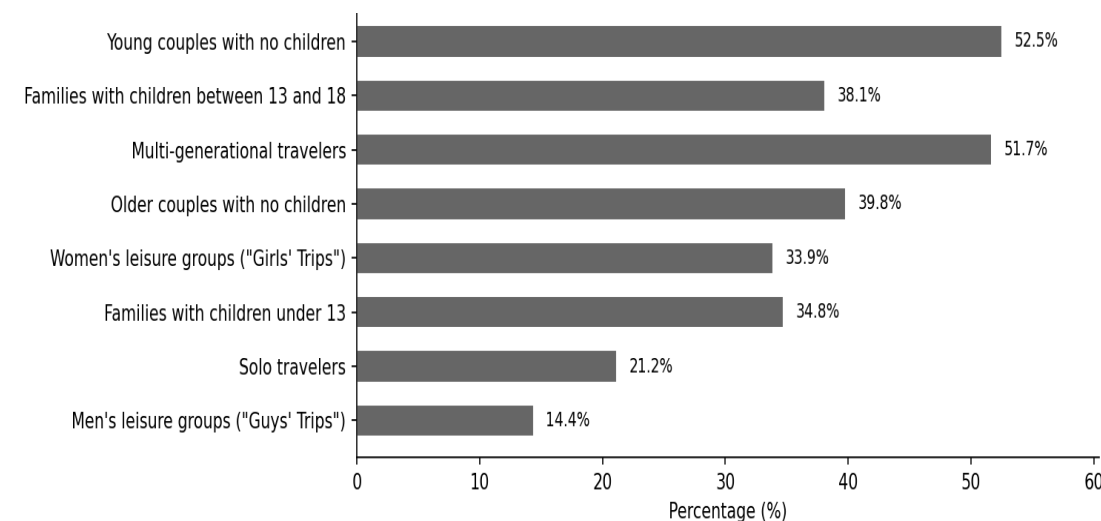
Q: TOURISM ASSETS NEEDED TO ATTRACT MORE VISITORS

Stakeholders ranked what assets the region needs most to increase competitiveness.



Q: LEISURE MARKET SEGMENTS WITH GREATEST GROWTH POTENTIAL

Stakeholders selected the top three market segments with the most potential for growth, indicating strong opportunities in young professional, multi-generational, and established adult markets.



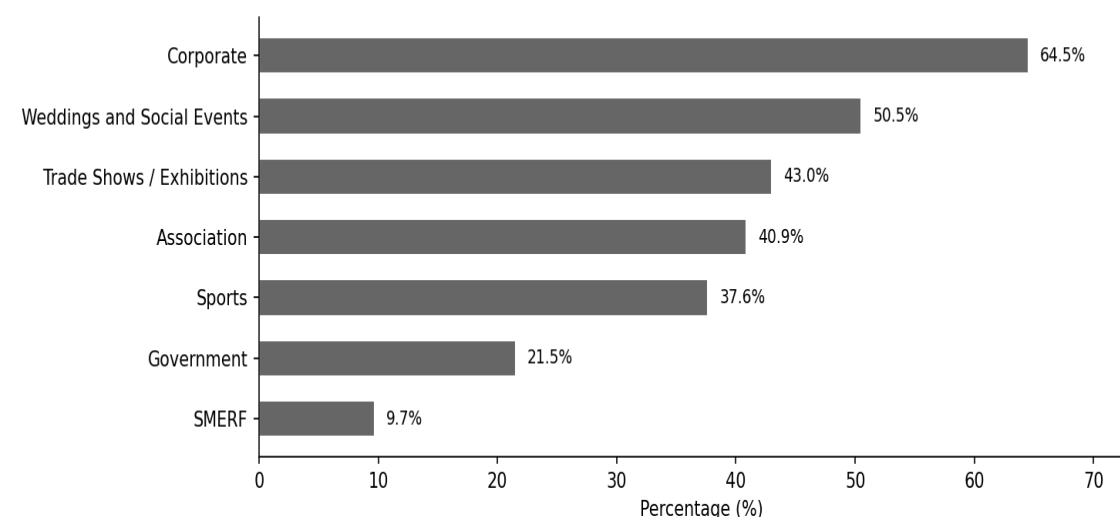
Q: WHAT THE REGION IS MISSING

Open-ended responses about what the region lacks from a tourism product standpoint. Hotels and lodging were the most frequently cited needs.



Q: GROUP BUSINESS EXPANSION

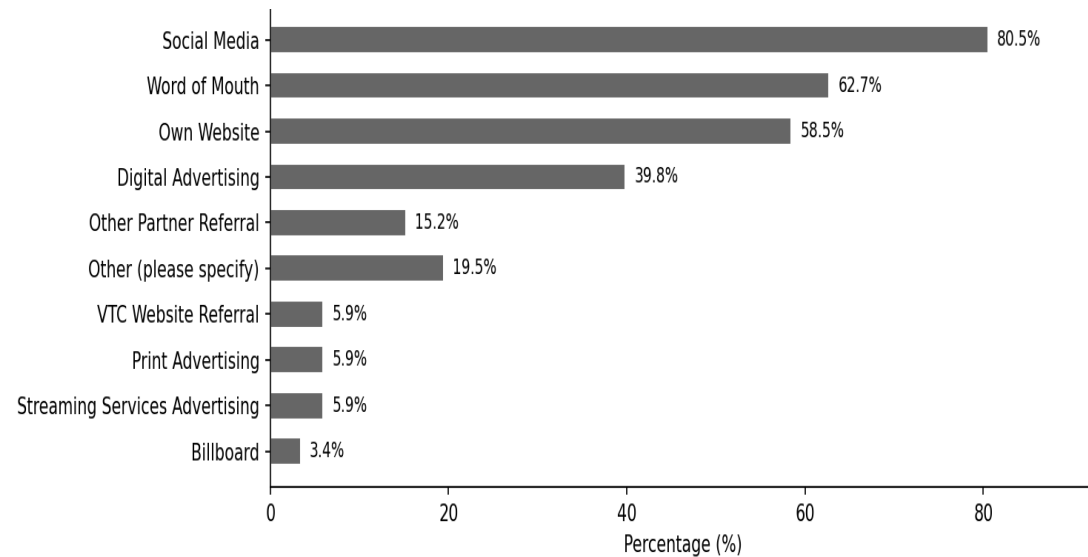
91.11% of respondents indicated the region should expand its offerings for group business. Among those who supported expansion, the following segments were identified as having the greatest potential:



Coastal Virginia: Hampton Roads Regional Survey Results

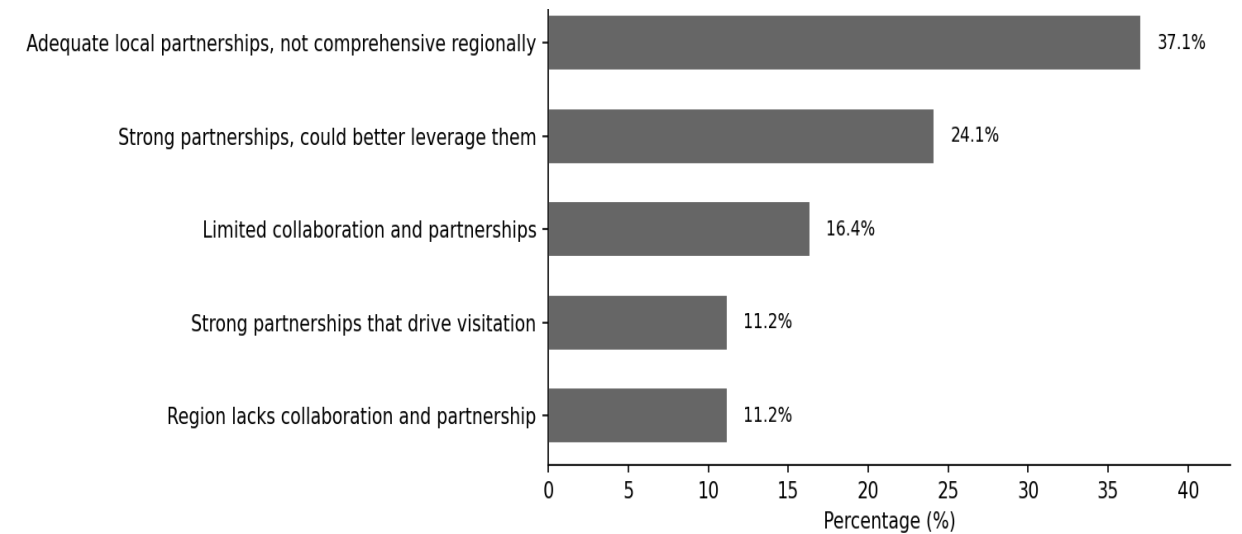
Q: HOW VISITORS ARE FINDING YOUR BUSINESS

Stakeholders identified the top three ways visitors discover their businesses.



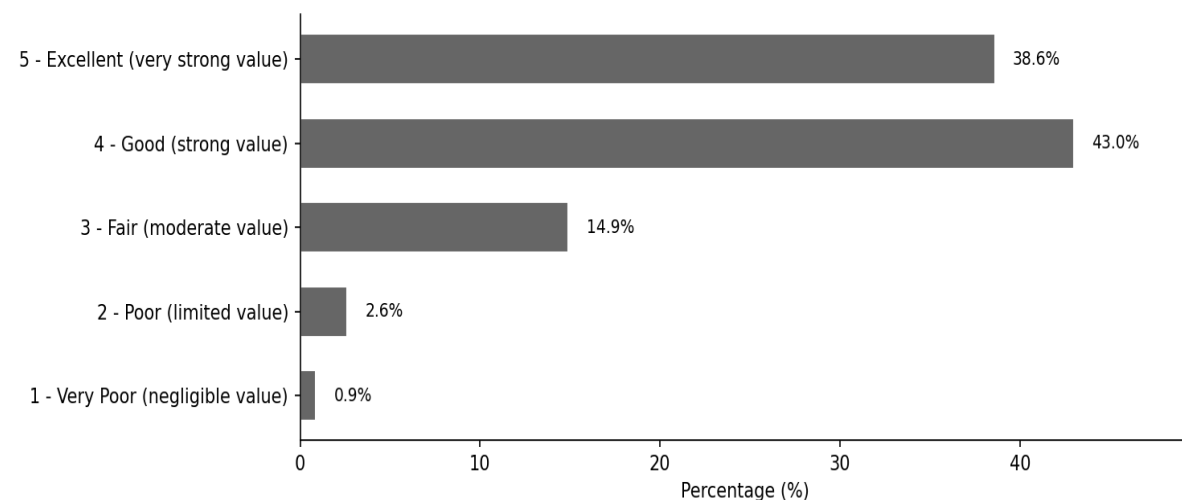
Q: LEVEL OF REGIONAL COLLABORATION

Stakeholders assessed the current level of collaboration and partnerships in the region.



Q: VALUE OF ADDITIONAL REGIONAL ITINERARIES

Stakeholders rated the potential value of developing additional regional itineraries.



Q: STAKEHOLDER PERSPECTIVE

“There are 7 cities that do communicate, but if they positioned themselves as one region...with all the assets we have, we'd be unstoppable!”
— Stakeholder, Hampton Roads Region



Northern Virginia Regional Survey Results

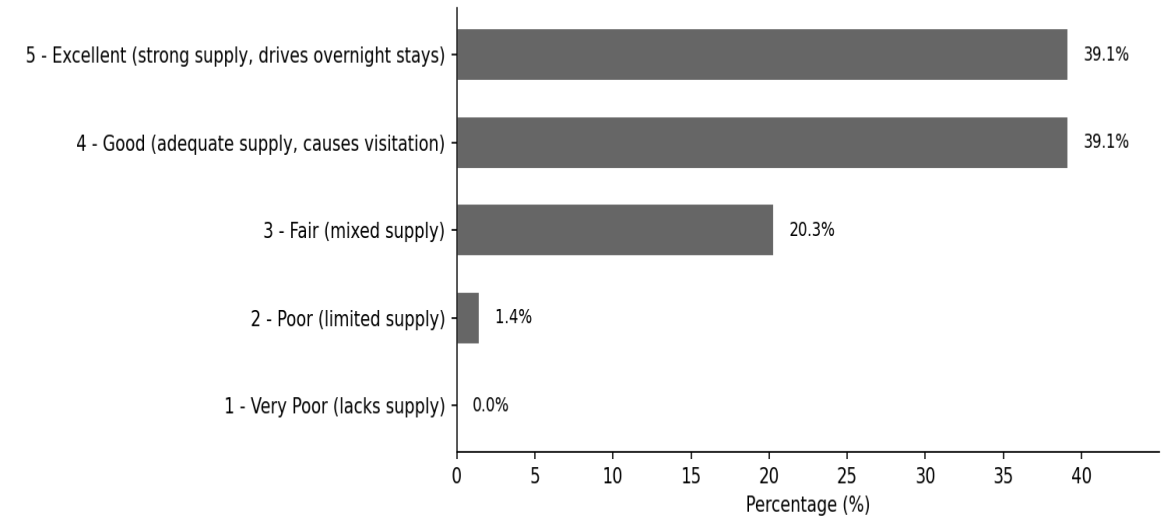
Q: WORDS THAT COME TO MIND ABOUT THE REGION

Respondents were asked to provide three words or phrases that come to mind when thinking of the region.



Q: RATING OF CURRENT TOURISM ASSETS

Stakeholders rated the region's current tourism assets on a scale of 1-5 for attracting visitors.



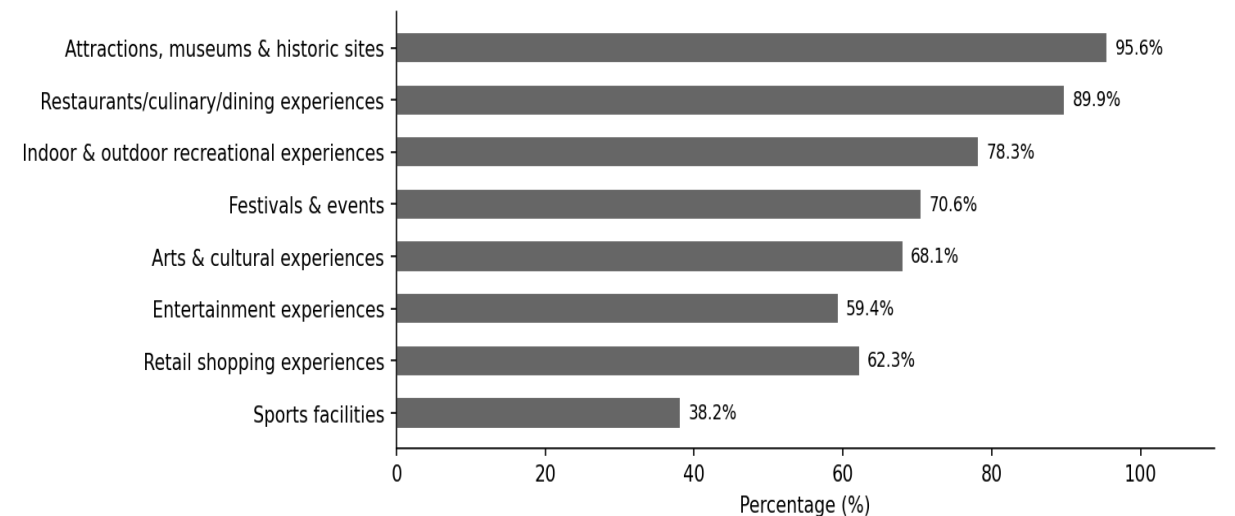
Q: TOP THINGS TO SEE OR RECOMMEND

When friends and family visit, these are the top experiences stakeholders recommend.



Q: ASSETS MOST LIKELY TO DRIVE VISITATION

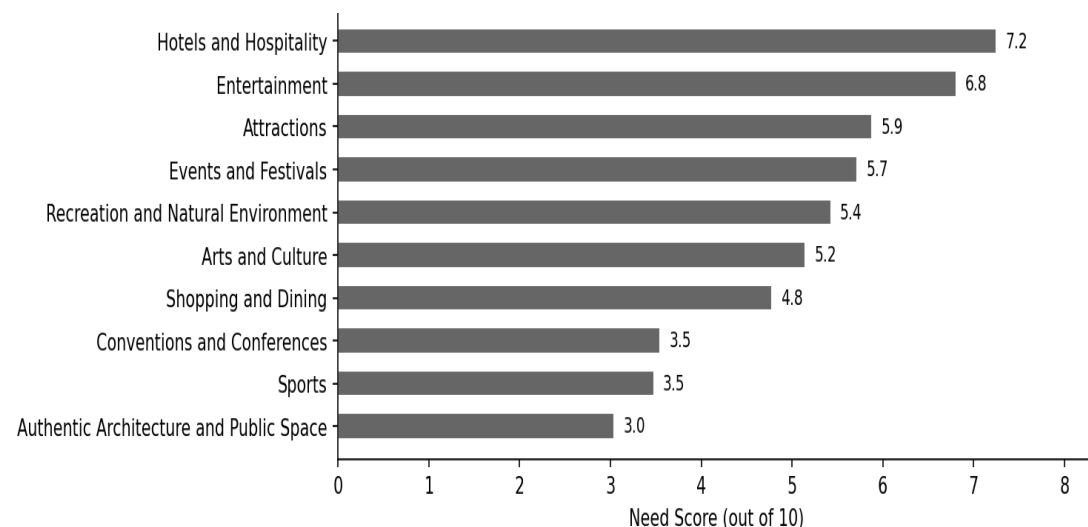
This chart shows asset categories rated as 'Very Likely' or 'Likely' to drive visitation.



Northern Virginia Regional Survey Results

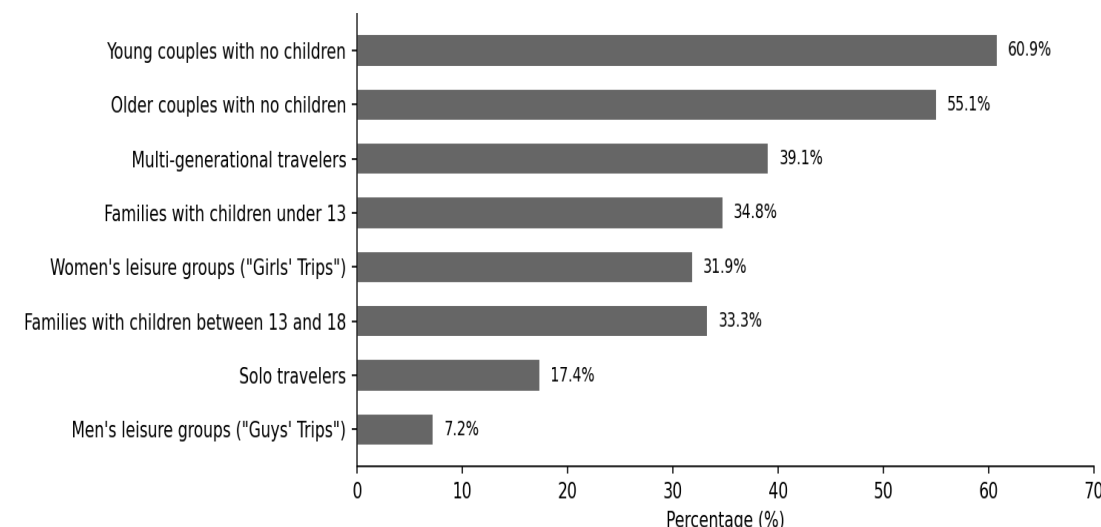
Q: TOURISM ASSETS NEEDED TO ATTRACT MORE VISITORS

Stakeholders ranked what assets the region needs most to increase competitiveness.



Q: LEISURE MARKET SEGMENTS WITH GREATEST GROWTH POTENTIAL

Stakeholders selected the top three market segments with the most potential for growth, indicating strong opportunities in young professional, multi-generational, and established adult markets.



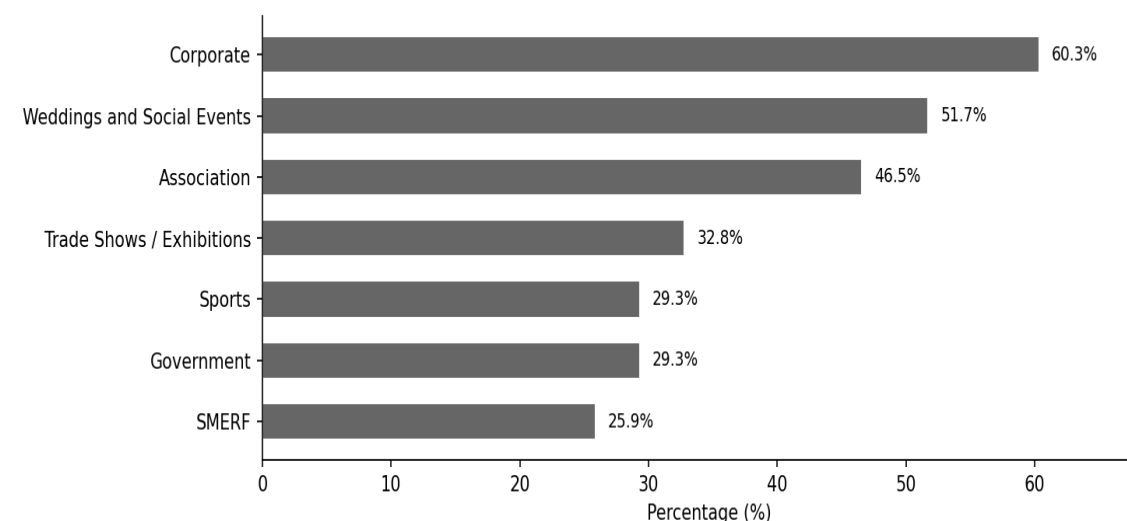
Q: WHAT THE REGION IS MISSING

Open-ended responses about what the region lacks from a tourism product standpoint. Hotels and lodging were the most frequently cited needs.



Q: GROUP BUSINESS EXPANSION

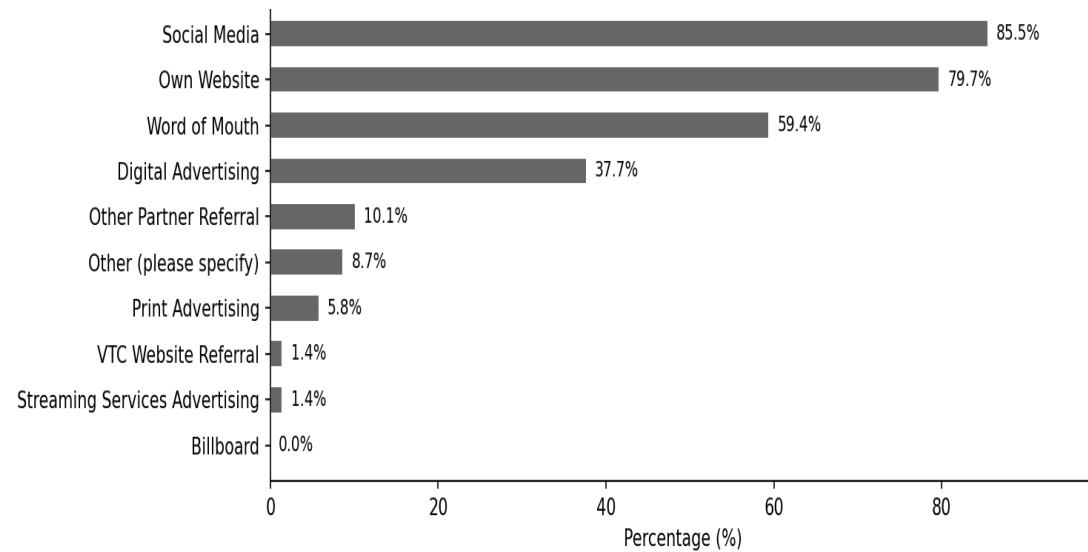
85.29% of respondents indicated the region should expand its offerings for group business. Among those who supported expansion, the following segments were identified as having the greatest potential:



Northern Virginia Regional Survey Results

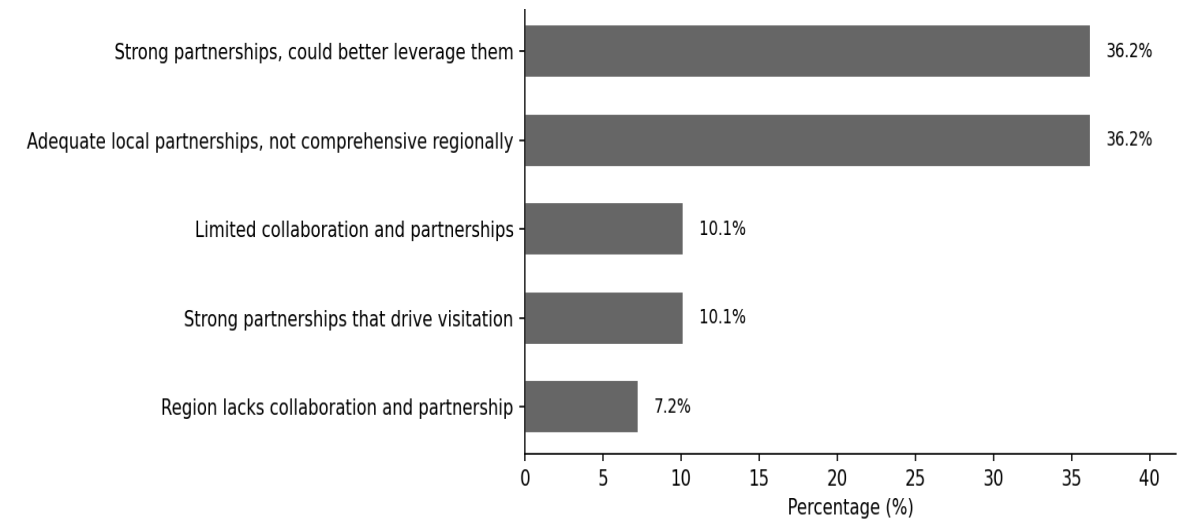
Q: HOW VISITORS ARE FINDING YOUR BUSINESS

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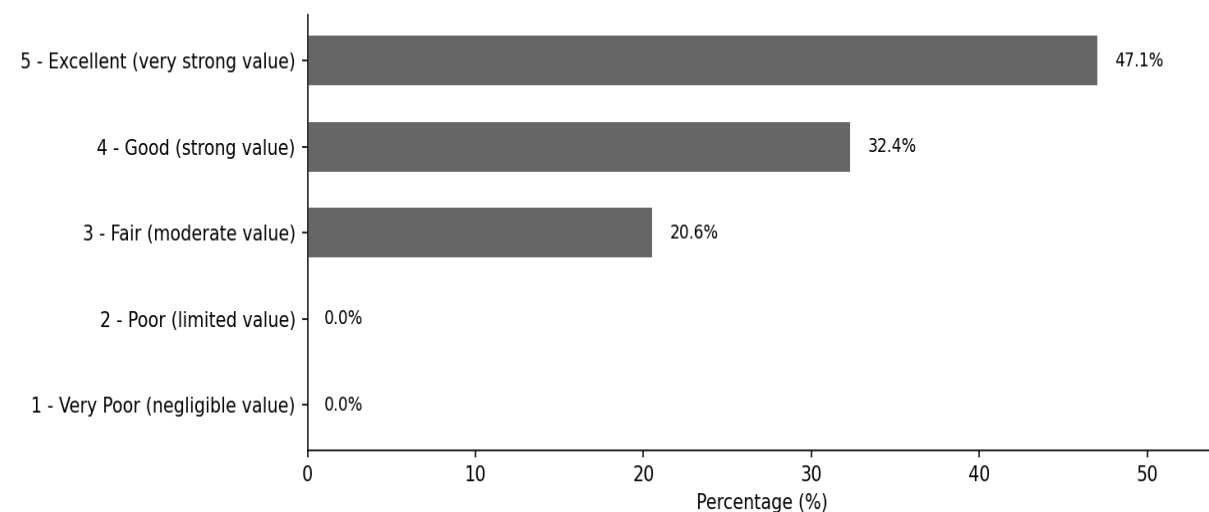
Q: LEVEL OF REGIONAL COLLABORATION

Stakeholders assessed the current level of collaboration and partnerships in the region.



Q: VALUE OF ADDITIONAL REGIONAL ITINERARIES

Stakeholders rated the potential value of developing additional regional itineraries.



Q: STAKEHOLDER PERSPECTIVE

“Too many missed opportunities for unique locations - Salamander Resort has won numerous national awards, the National Sporting Library and Museum has been rated one of the top museums in the country, The Red Fox Inn, as one of the oldest and most historic inns and restaurants in the country -- great shopping, none of this seems to get promoted at all but when people visit Middleburg, they all love it.”
— Stakeholder, Northern Virginia Region



Shenandoah Valley Regional Survey Results

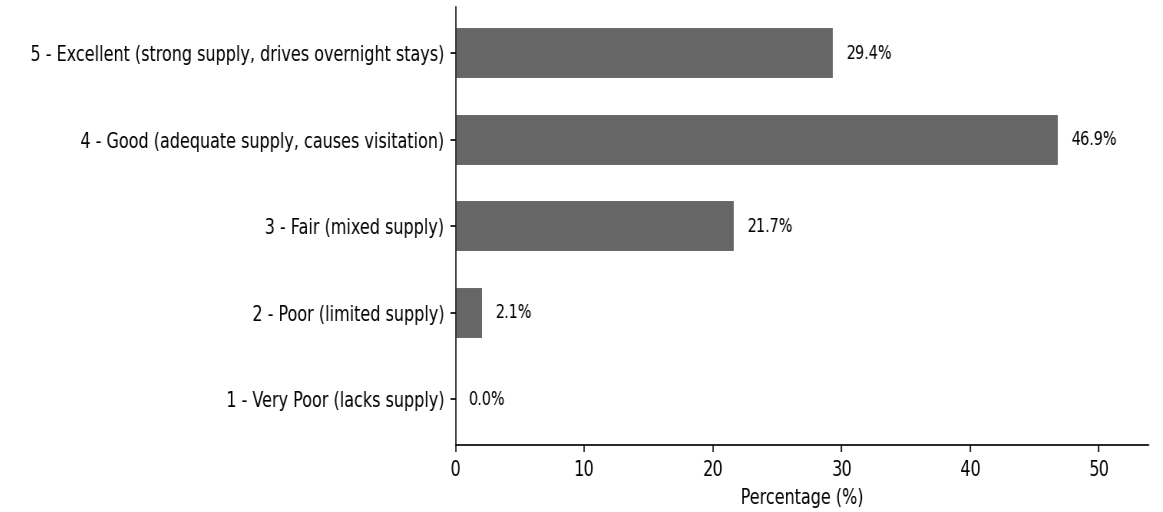
Q: WORDS THAT COME TO MIND ABOUT THE REGION

Respondents were asked to provide three words or phrases that come to mind when thinking of the region.



Q: RATING OF CURRENT TOURISM ASSETS

Stakeholders rated the region's current tourism assets on a scale of 1-5 for attracting visitors.



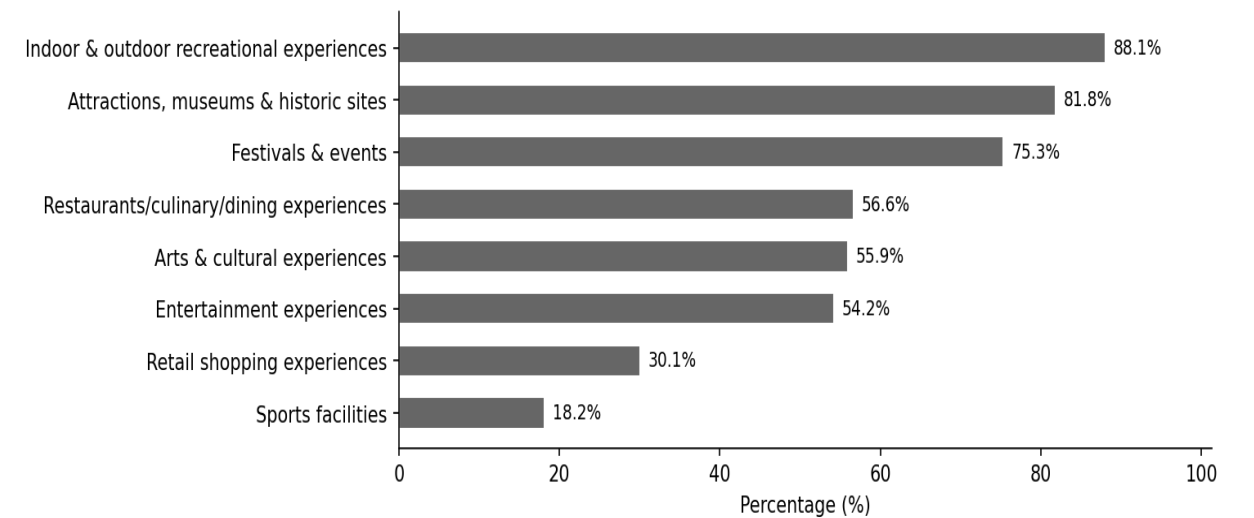
Q: TOP THINGS TO SEE OR RECOMMEND

When friends and family visit, these are the top experiences stakeholders recommend.



Q: ASSETS MOST LIKELY TO DRIVE VISITATION

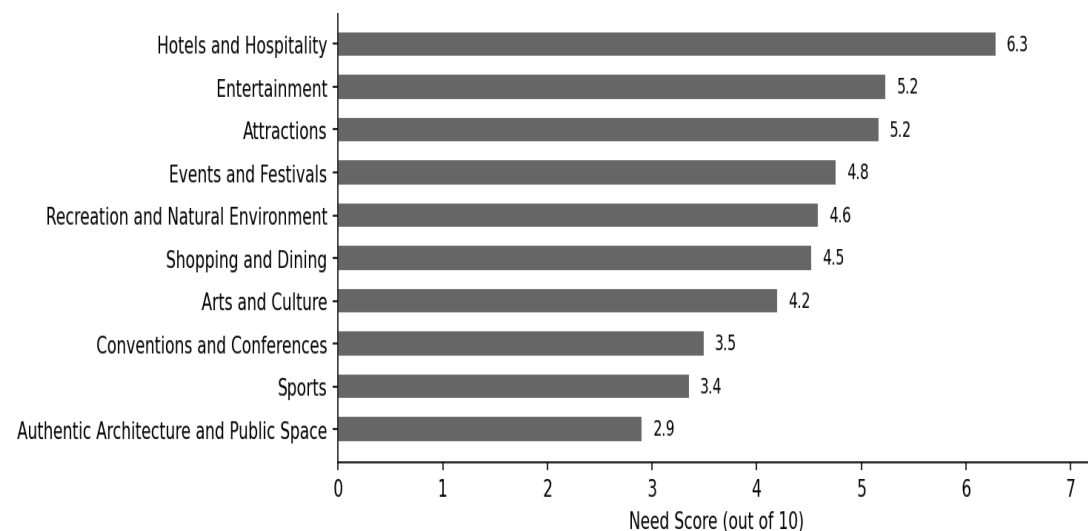
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Shenandoah Valley Regional Survey Results

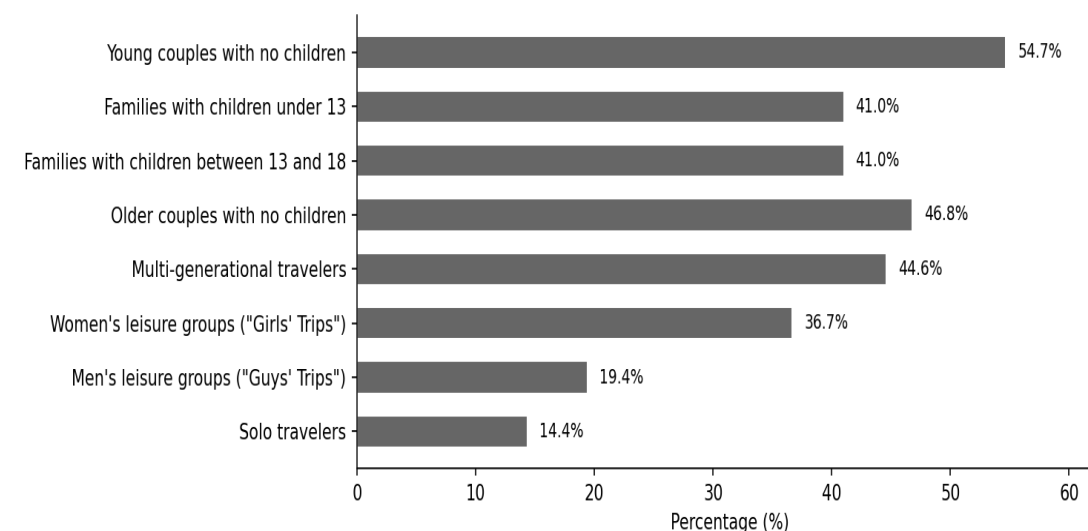
Q: TOURISM ASSETS NEEDED TO ATTRACT MORE VISITORS

Stakeholders ranked what assets the region needs most to increase competitiveness.



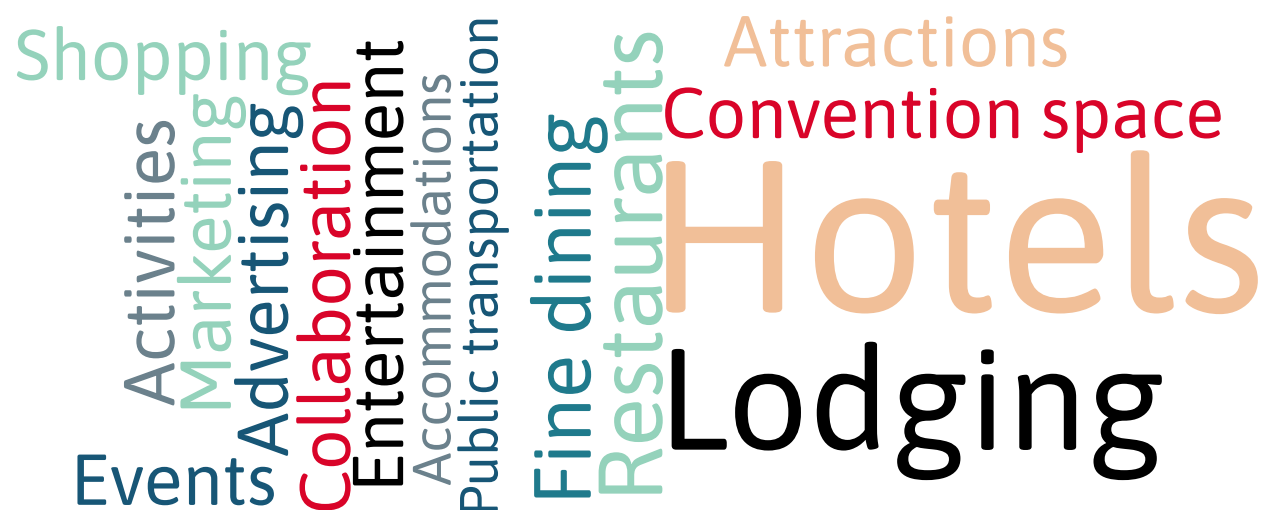
Q: LEISURE MARKET SEGMENTS WITH GREATEST GROWTH POTENTIAL

Stakeholders selected the top three market segments with the most potential for growth, indicating strong opportunities in young professional, multi-generational, and established adult markets.



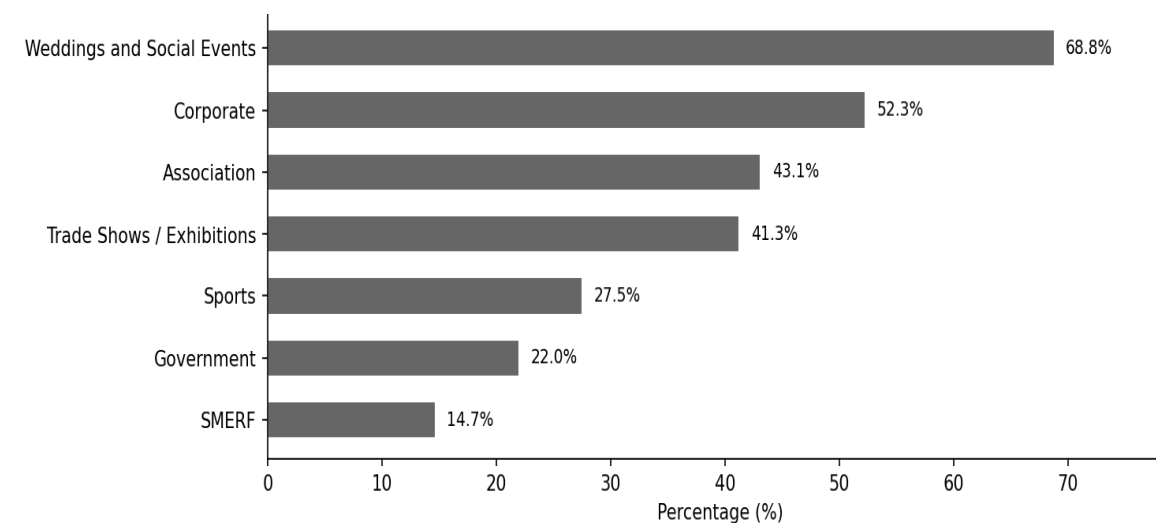
Q: WHAT THE REGION IS MISSING

Open-ended responses about what the region lacks from a tourism product standpoint. Hotels and lodging were the most frequently cited needs.



Q: GROUP BUSINESS EXPANSION

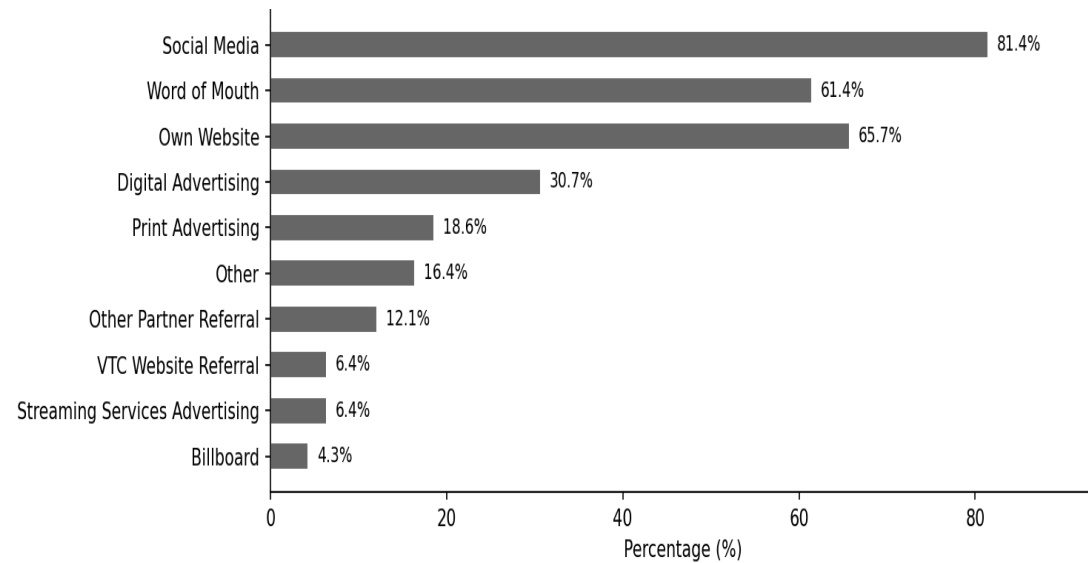
79.85% of respondents indicated the region should expand its offerings for group business. Among those who supported expansion, the following segments were identified as having the greatest potential:



Shenandoah Valley Regional Survey Results

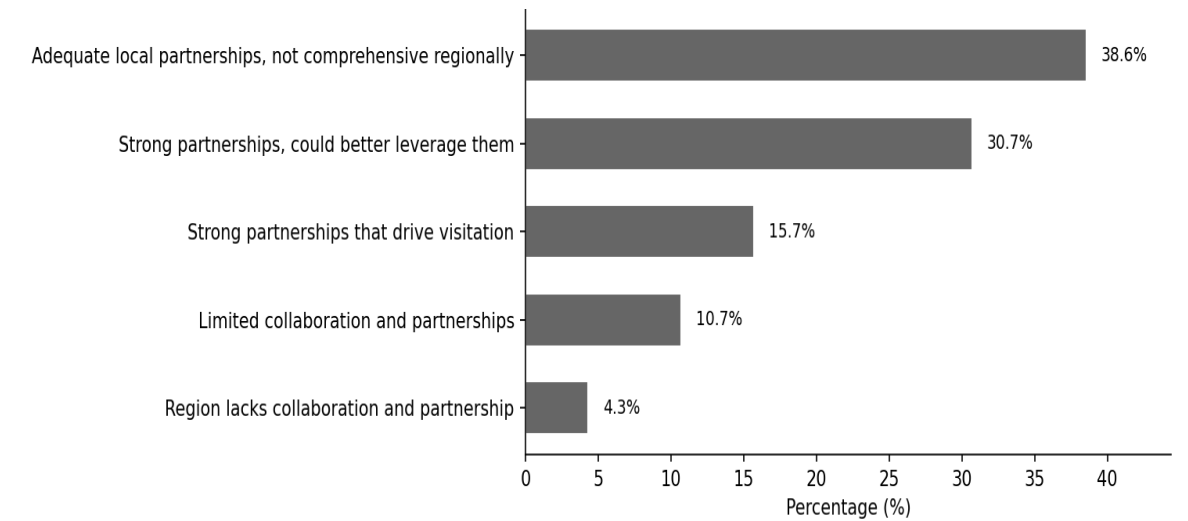
Q: HOW VISITORS ARE FINDING YOUR BUSINESS

Stakeholders identified the top three ways visitors discover their businesses.



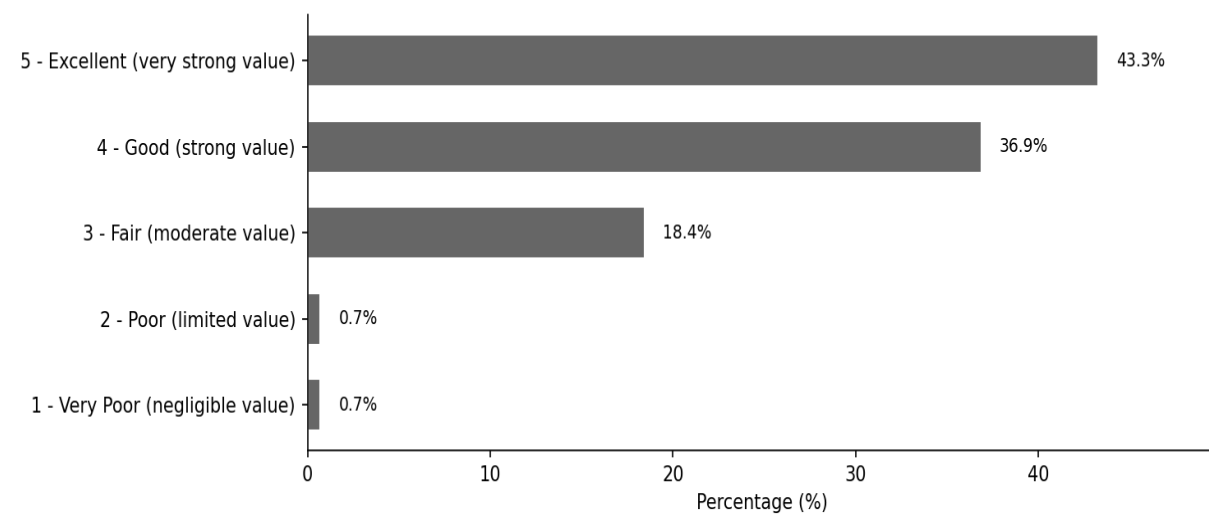
Q: LEVEL OF REGIONAL COLLABORATION

Stakeholders assessed the current level of collaboration and partnerships in the region.



Q: VALUE OF ADDITIONAL REGIONAL ITINERARIES

Stakeholders rated the potential value of developing additional regional itineraries.



Q: STAKEHOLDER PERSPECTIVE

“The area I am in (Staunton-Augusta-Waynesboro) has great collaboration, but I think we could do better as a Shen. Valley region to drive traffic within the region. There are a few regional entities, like Shenandoah Valley Travel Association (SVTA), SV Wine Trail, and the Beerwerks Trail that are effective in boosting tourism across the area. Strong collaboration and partnerships help drive tourism in the region.”

— Stakeholder, Shenandoah Valley Region



Southern Virginia Regional Survey Results

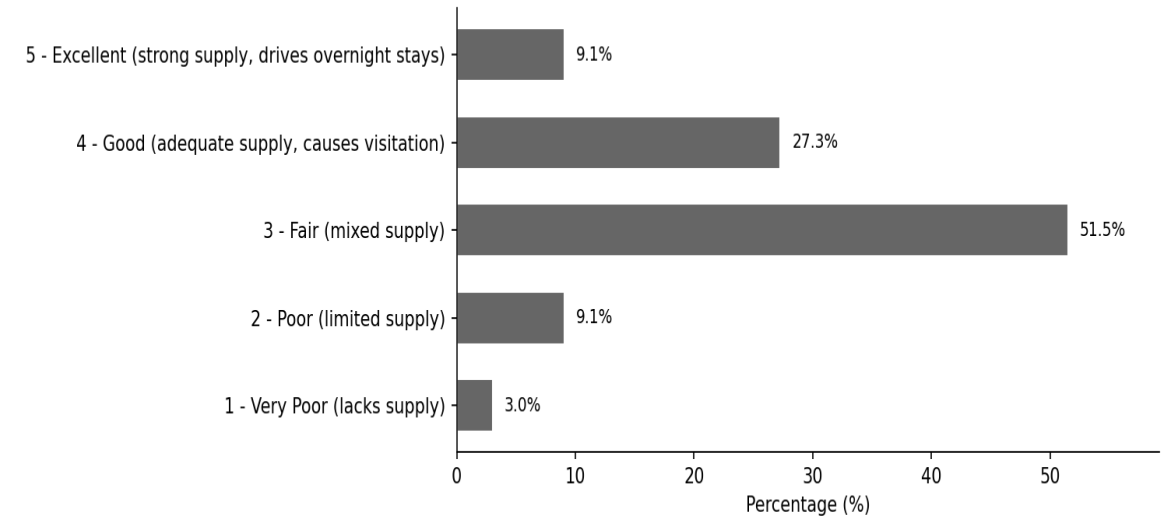
Q: WORDS THAT COME TO MIND ABOUT THE REGION

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Q: RATING OF CURRENT TOURISM ASSETS

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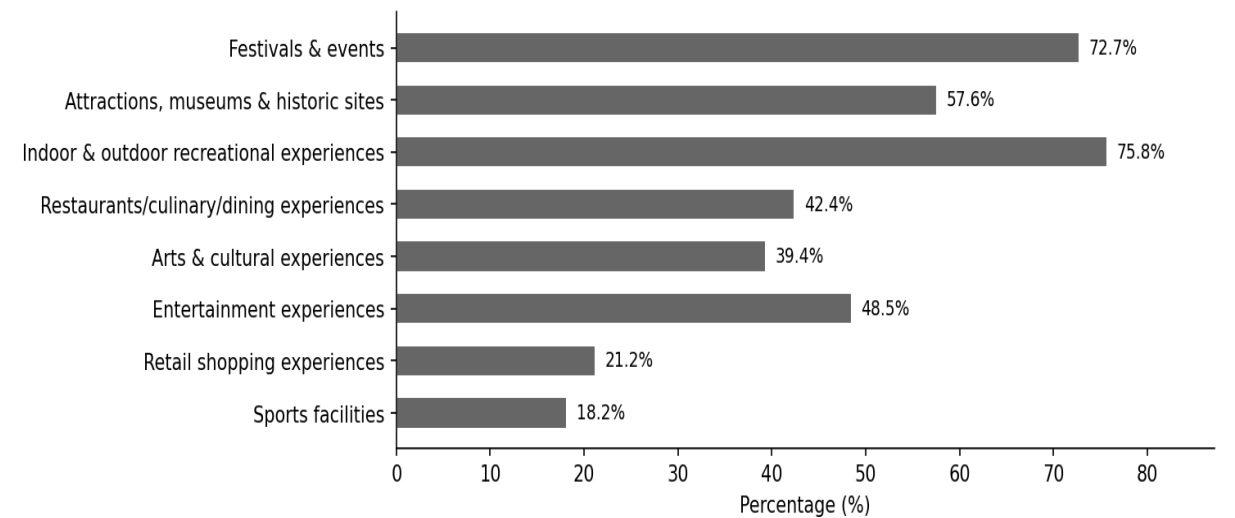
Q: TOP THINGS TO SEE OR RECOMMEND

When friends and family visit, these are the top experiences stakeholders recommend.



Q: ASSETS MOST LIKELY TO DRIVE VISITATION

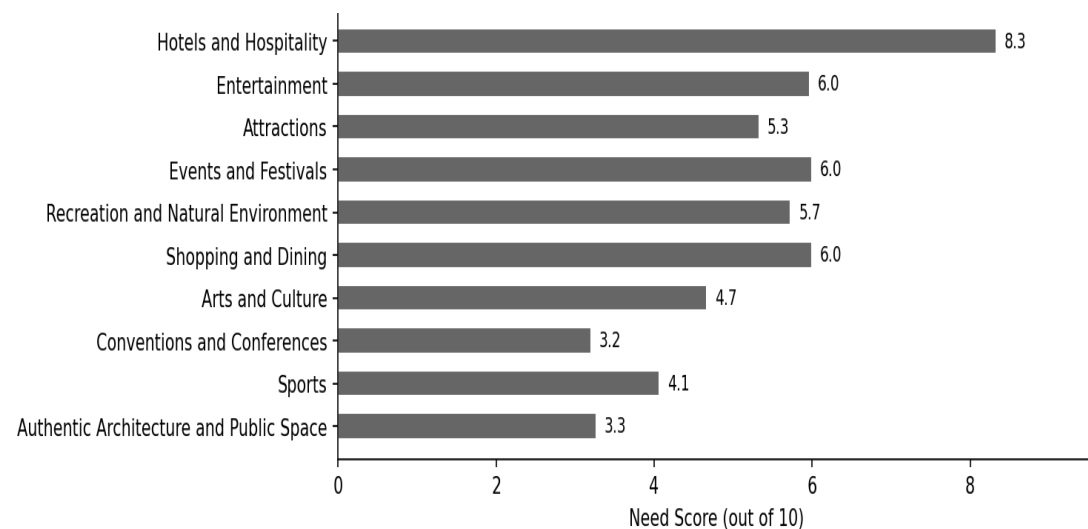
This chart shows asset categories rated as 'Very Likely' or 'Likely' to drive visitation.



Southern Virginia Regional Survey Results

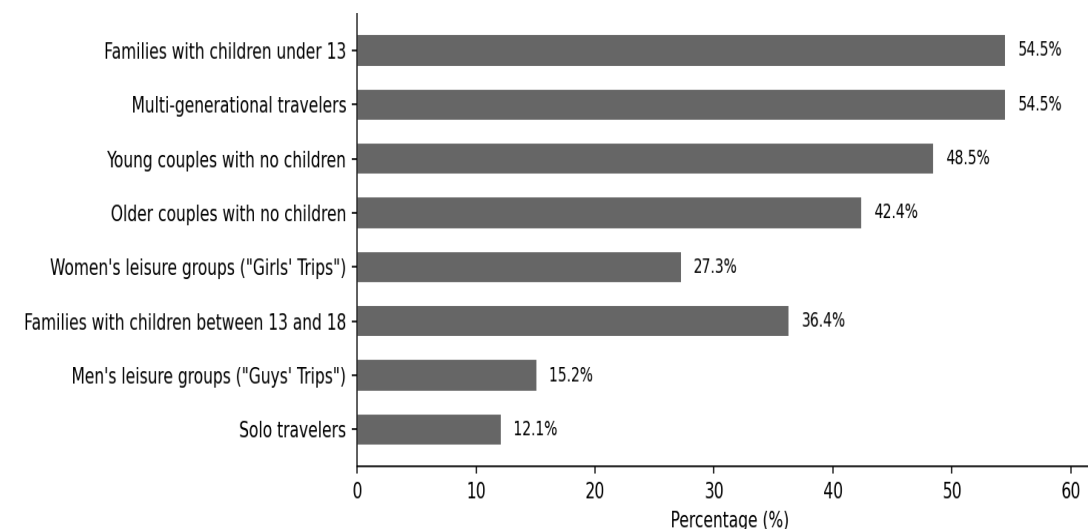
Q: TOURISM ASSETS NEEDED TO ATTRACT MORE VISITORS

Stakeholders ranked what assets the region needs most to increase competitiveness.



Q: LEISURE MARKET SEGMENTS WITH GREATEST GROWTH POTENTIAL

Stakeholders selected the top three market segments with the most potential for growth, indicating strong opportunities in young professional, multi-generational, and established adult markets.



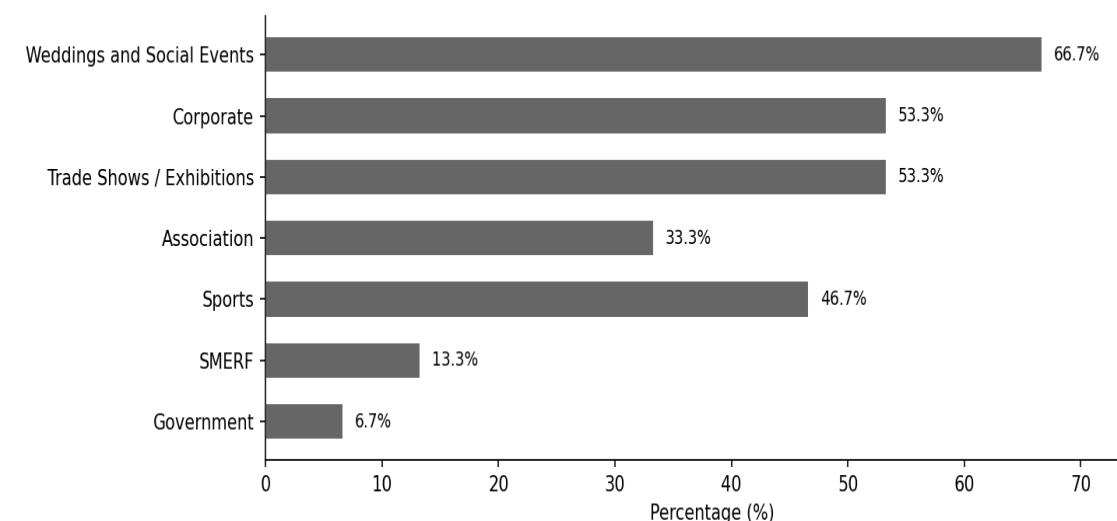
Q: WHAT THE REGION IS MISSING

Open-ended responses about what the region lacks from a tourism product standpoint. Hotels and lodging were the most frequently cited needs.



Q: GROUP BUSINESS EXPANSION

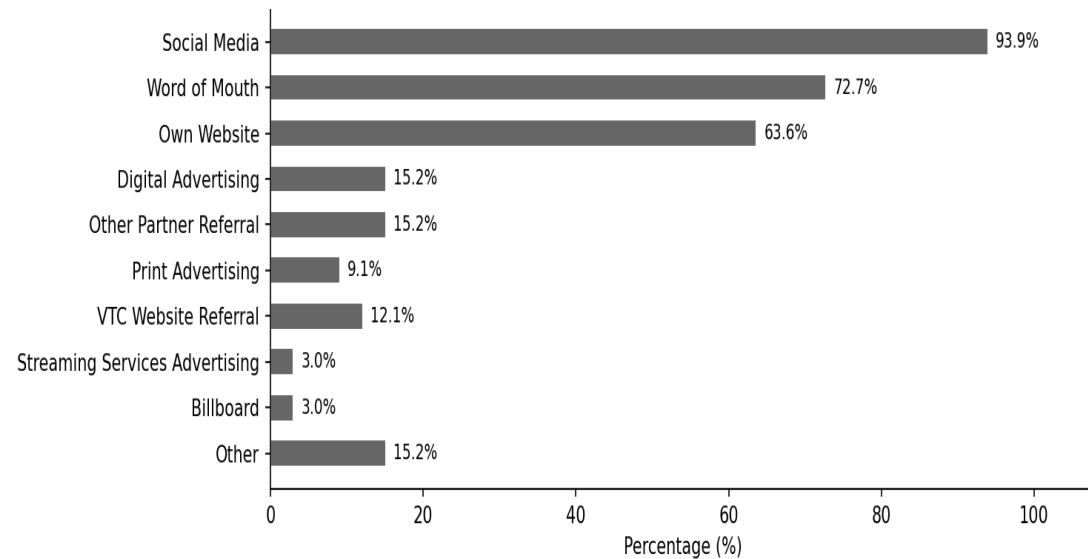
93.75% of respondents indicated the region should expand its offerings for group business. Among those who supported expansion, the following segments were identified as having the greatest potential:



Southern Virginia Regional Survey Results

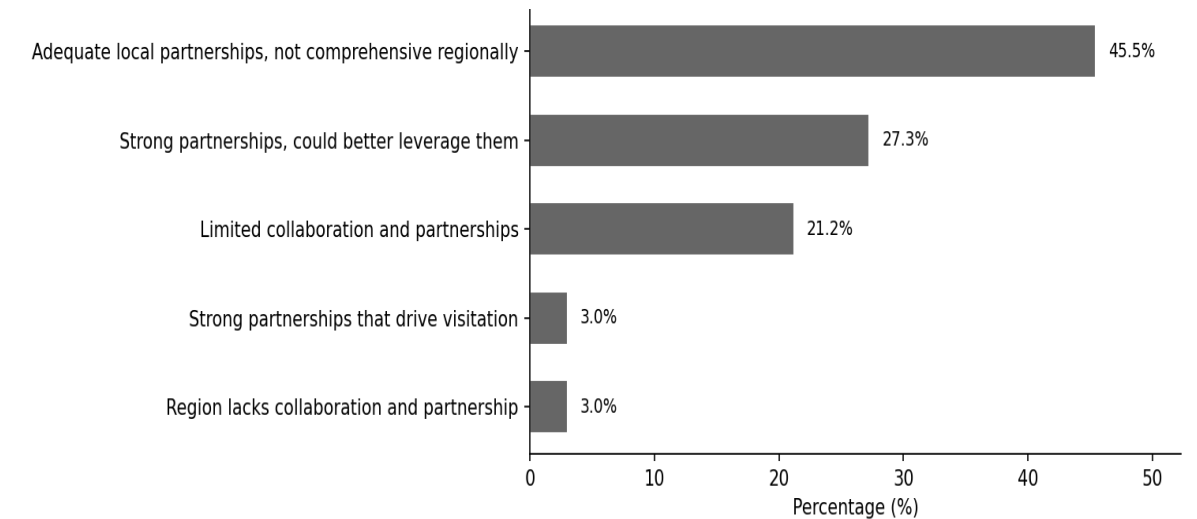
Q: HOW VISITORS ARE FINDING YOUR BUSINESS

Stakeholders identified the top three ways visitors discover their businesses.



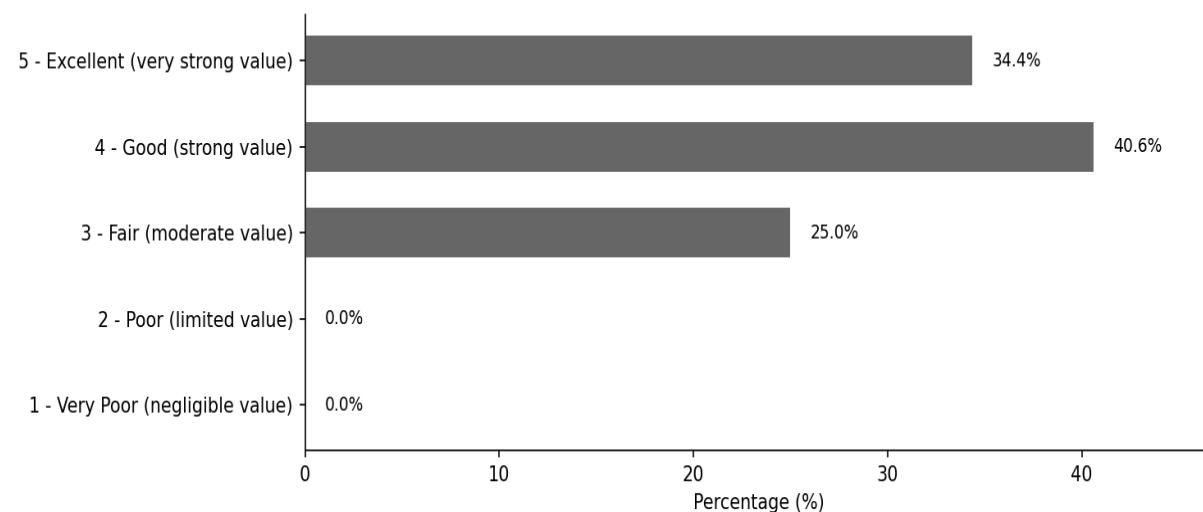
Q: LEVEL OF REGIONAL COLLABORATION

Stakeholders assessed the current level of collaboration and partnerships in the region.



Q: VALUE OF ADDITIONAL REGIONAL ITINERARIES

Stakeholders rated the potential value of developing additional regional itineraries.



Q: STAKEHOLDER PERSPECTIVE

There are missing resources and assets to create a true tourism town/area. There's a lake: BUT if you can't come up for the day or weekend and get ON it, it's just a pretty lake. We have a partnership with our neighboring county tourism and work together to come with things that both areas can capitalize upon. (Southern Va Craft Beverage SHUTTLE, for example). Small-town folks sometimes don't understand the value of Tourism. Additionally, businesses come and go frequently, partly due to lack of understanding of how to run them. There's more to just opening the doors. Some businesses refuse to work together."

— Stakeholder, Southern Virginia Region



South Boston Harvest Festival

Southwest Virginia: Blue Ridge Highlands Regional Survey Results

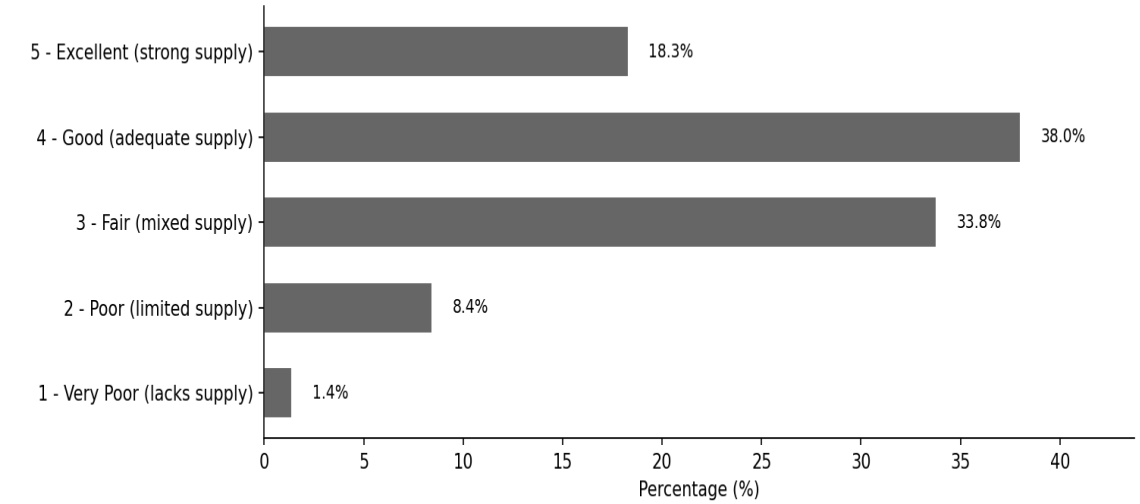
Q: WORDS THAT COME TO MIND ABOUT THE REGION

Respondents were asked to provide three words or phrases that come to mind when thinking of the region.



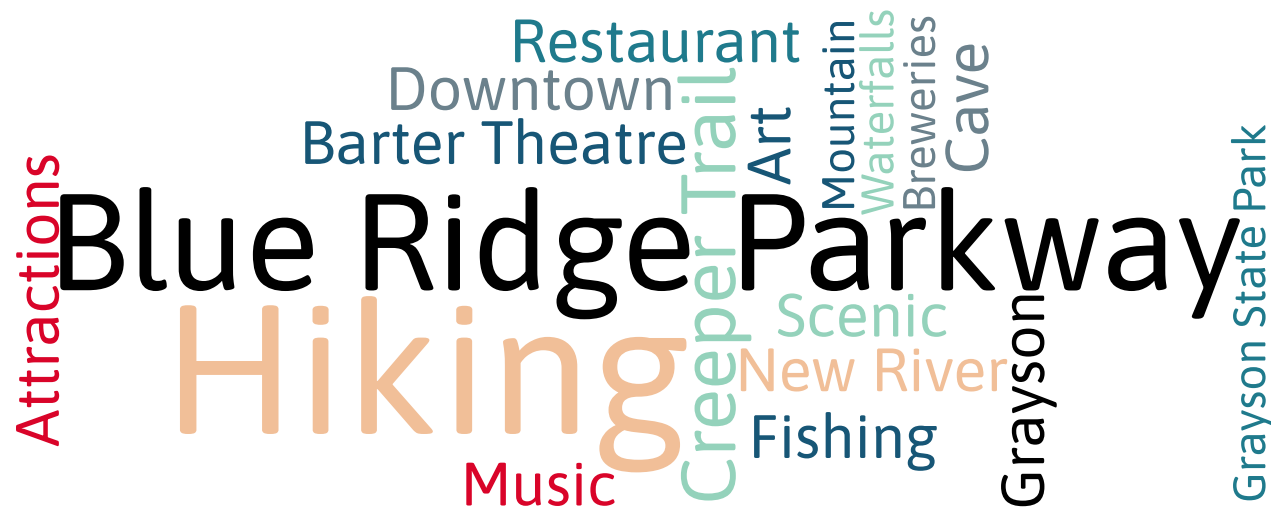
Q: RATING OF CURRENT TOURISM ASSETS

Stakeholders rated the region's current tourism assets on a scale of 1-5 for attracting visitors.



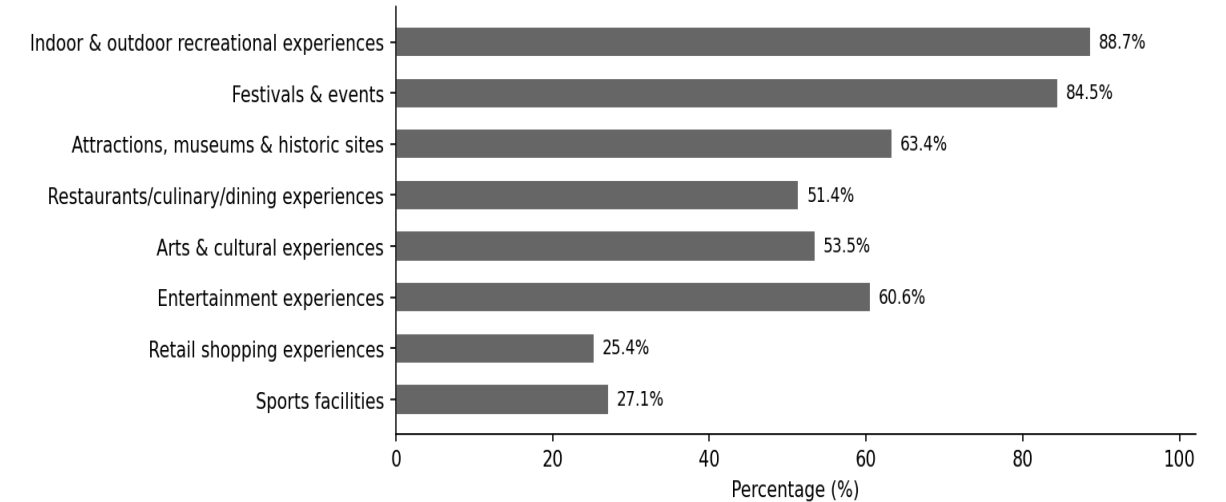
Q: TOP THINGS TO SEE OR RECOMMEND

When friends and family visit, these are the top experiences stakeholders recommend.



Q: ASSETS MOST LIKELY TO DRIVE VISITATION

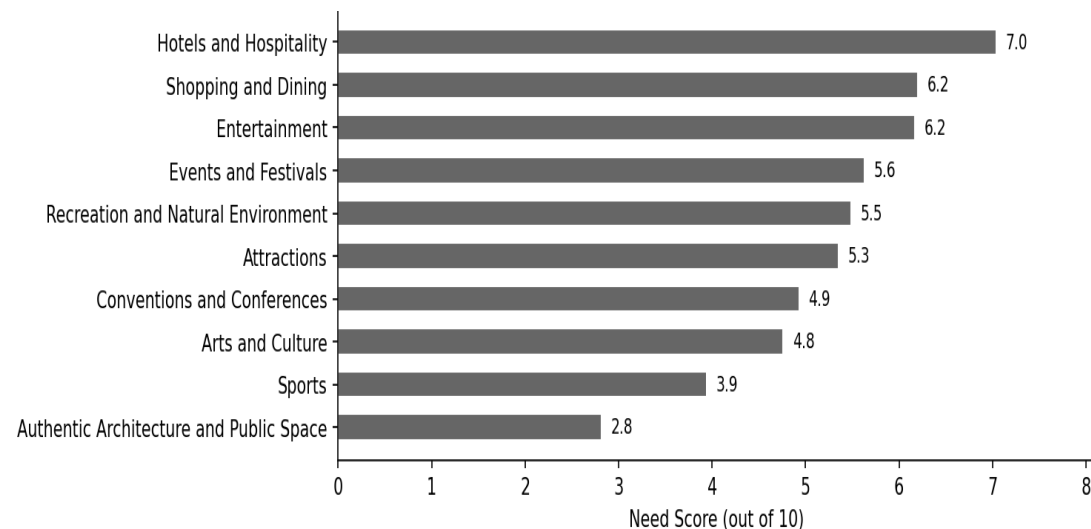
This chart shows asset categories rated as 'Very Likely' or 'Likely' to drive visitation.



Southwest Virginia: Blue Ridge Highlands Regional Survey Results

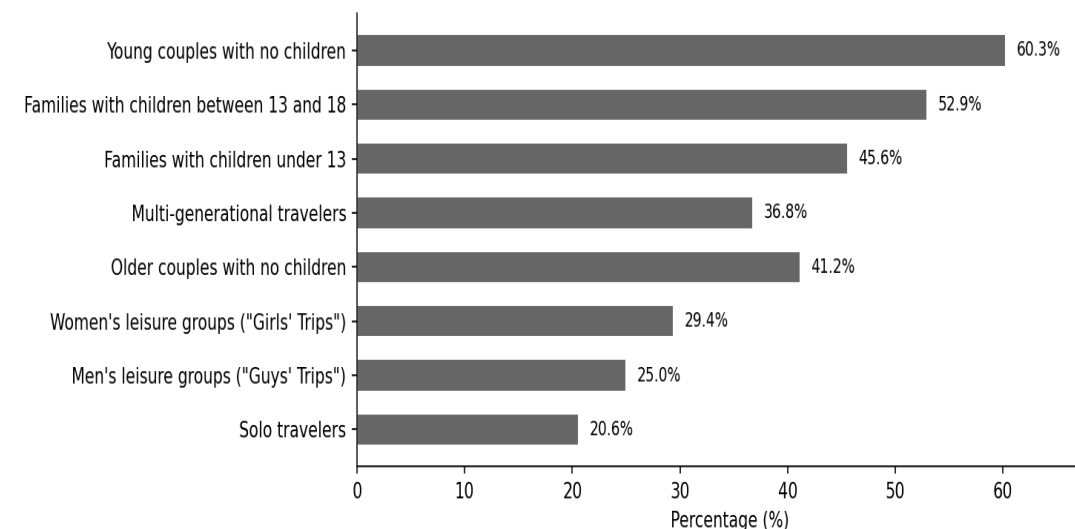
Q: TOURISM ASSETS NEEDED TO ATTRACT MORE VISITORS

Stakeholders ranked what assets the region needs most to increase competitiveness.



Q: LEISURE MARKET SEGMENTS WITH GREATEST GROWTH POTENTIAL

Stakeholders selected the top three market segments with the most potential for growth, indicating strong opportunities in young professional, multi-generational, and established adult markets.



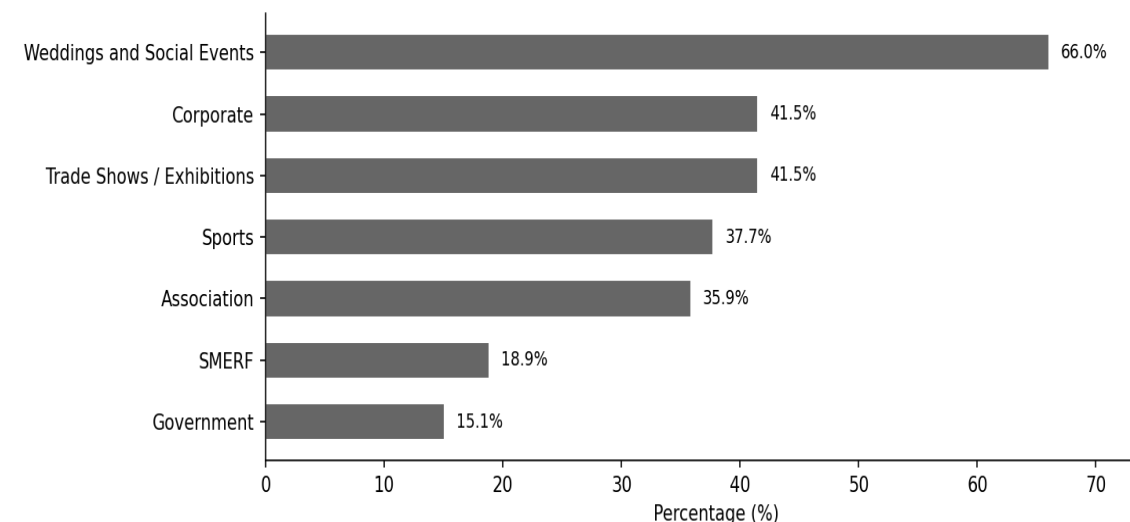
Q: WHAT THE REGION IS MISSING

Open-ended responses about what the region lacks from a tourism product standpoint. Hotels and lodging were the most frequently cited needs.



Q: GROUP BUSINESS EXPANSION

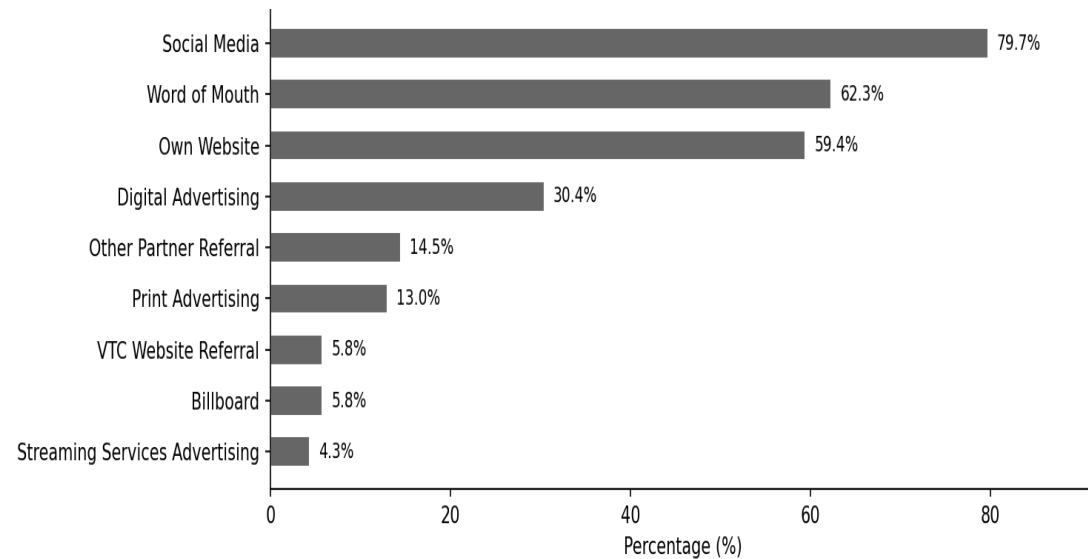
79.41% of respondents indicated the region should expand its offerings for group business. Among those who supported expansion, the following segments were identified as having the greatest potential:



Southwest Virginia: Blue Ridge Highlands Regional Survey Results

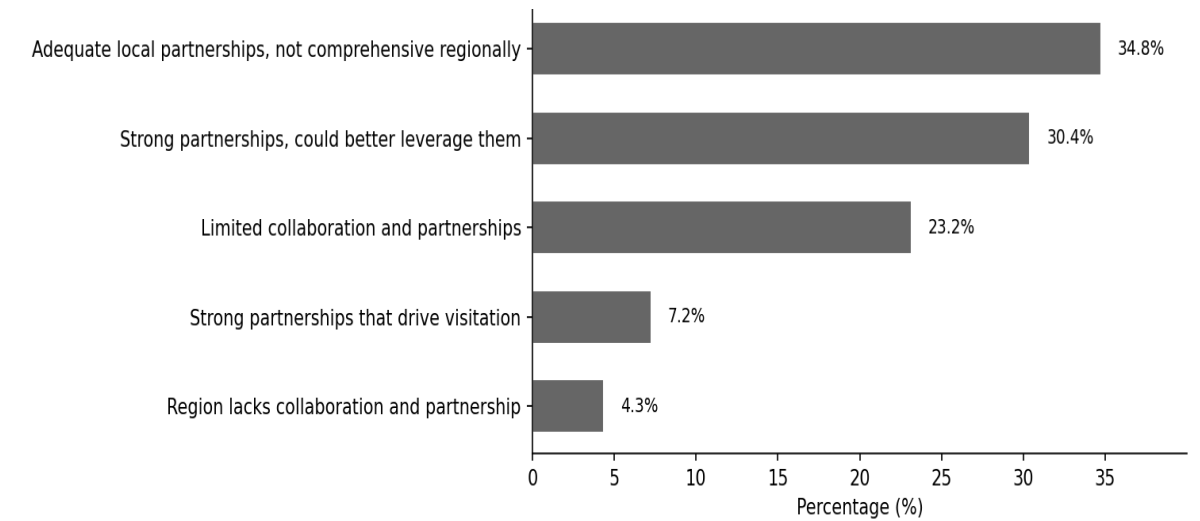
Q: HOW VISITORS ARE FINDING YOUR BUSINESS

Stakeholders identified the top three ways visitors discover their businesses.



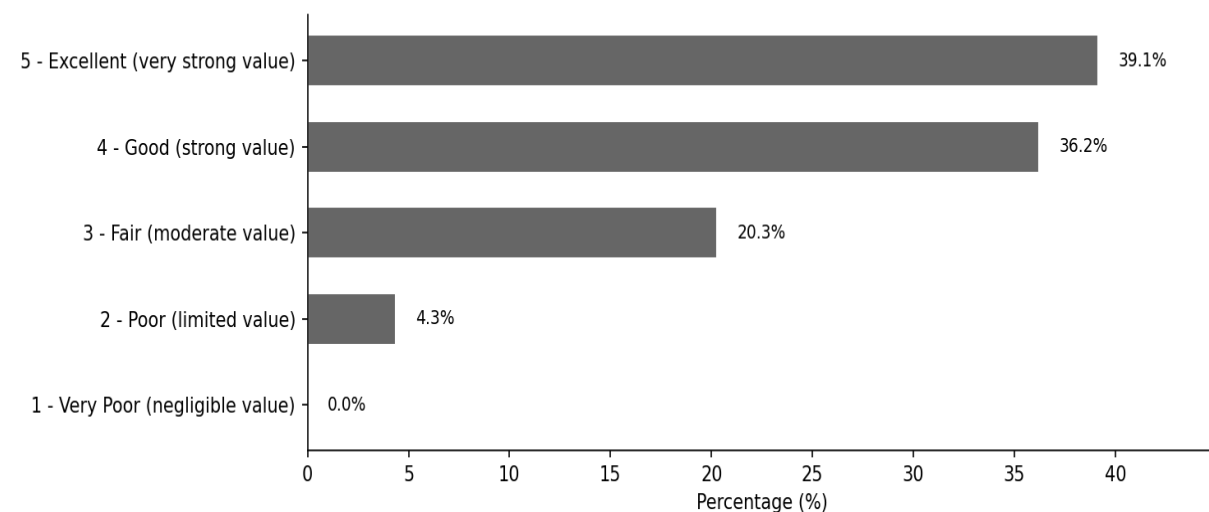
Q: LEVEL OF REGIONAL COLLABORATION

Stakeholders assessed the current level of collaboration and partnerships in the region.



Q: VALUE OF ADDITIONAL REGIONAL ITINERARIES

Stakeholders rated the potential value of developing additional regional itineraries.



Q: STAKEHOLDER PERSPECTIVE

“A live music experience along The Crooked Road – Whether it’s a front porch jam session, a small-town festival, or a night at the Birthplace of Country Music Museum, it’s the heartbeat of the region and something they always remember.”

— Stakeholder, Blue Ridge Highlands Region



Southwest Virginia: Heart of Appalachia Regional Survey Results

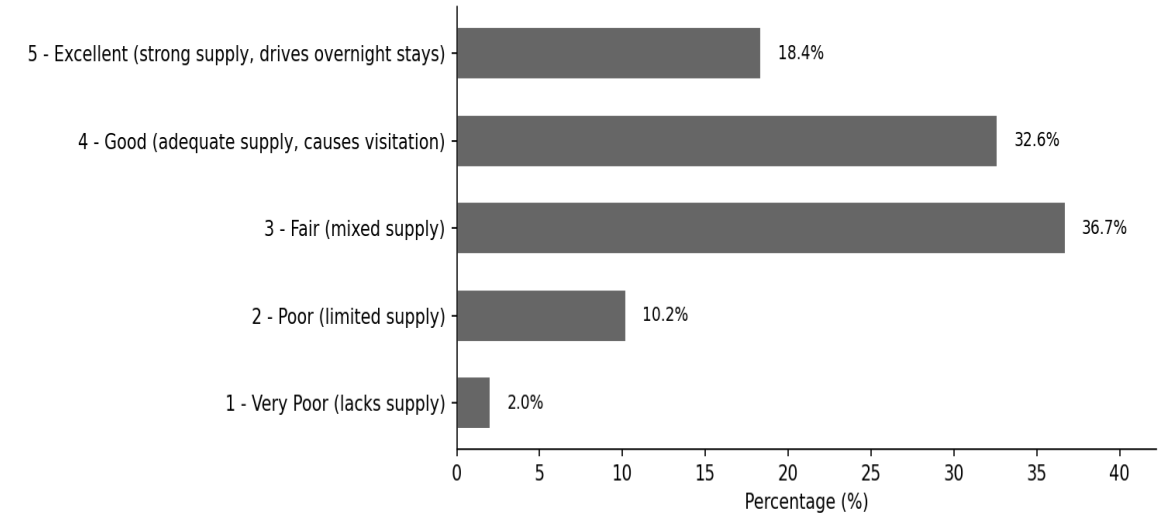
Q: WORDS THAT COME TO MIND ABOUT THE REGION

Respondents were asked to provide three words or phrases that come to mind when thinking of the region.



Q: RATING OF CURRENT TOURISM ASSETS

Stakeholders rated the region's current tourism assets on a scale of 1-5 for attracting visitors.



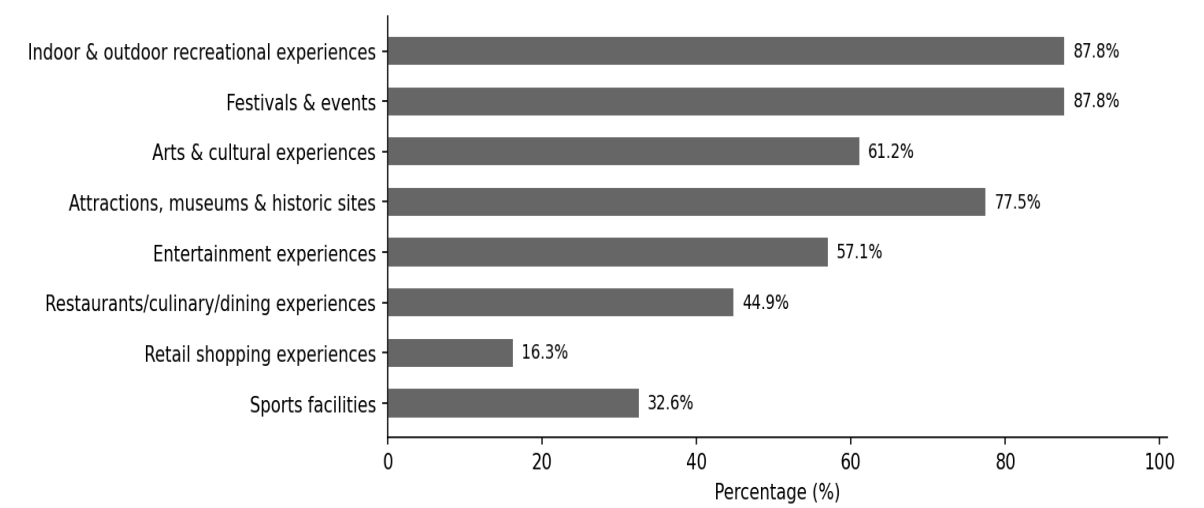
Q: TOP THINGS TO SEE OR RECOMMEND

When friends and family visit, these are the top experiences stakeholders recommend.



Q: ASSETS MOST LIKELY TO DRIVE VISITATION

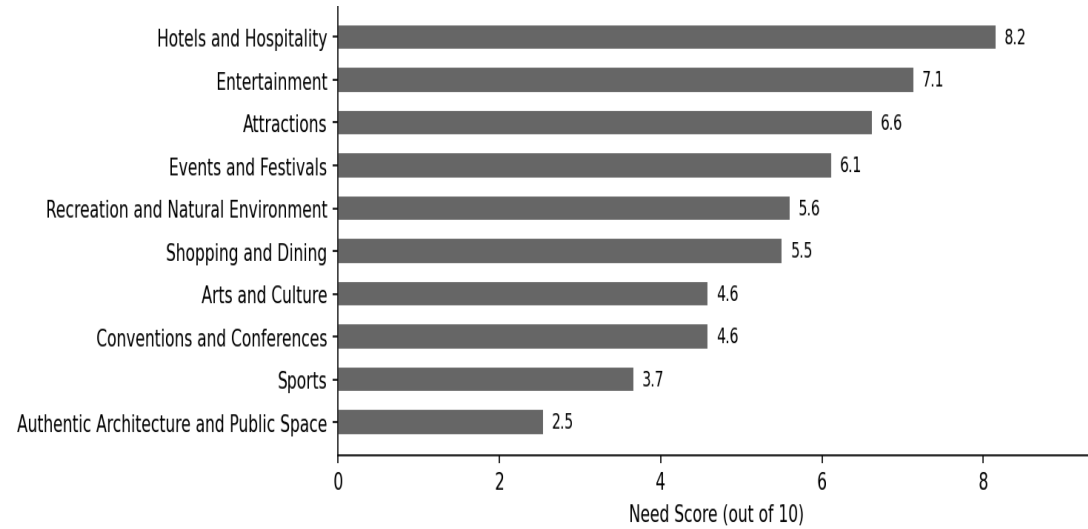
This chart shows asset categories rated as 'Very Likely' or 'Likely' to drive visitation.



Southwest Virginia: Heart of Appalachia Regional Survey Results

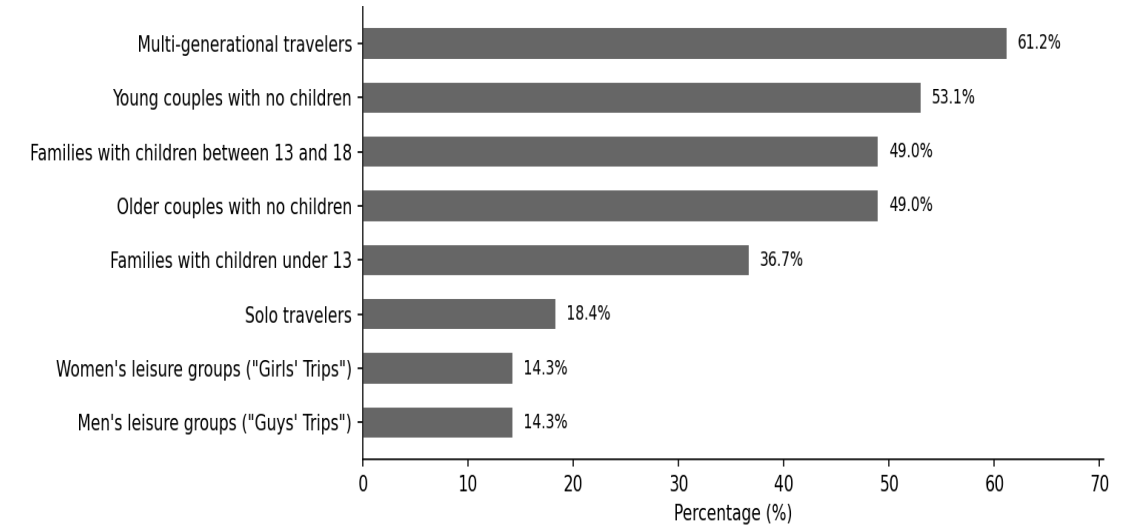
Q: TOURISM ASSETS NEEDED TO ATTRACT MORE VISITORS

Stakeholders ranked what assets the region needs most to increase competitiveness.



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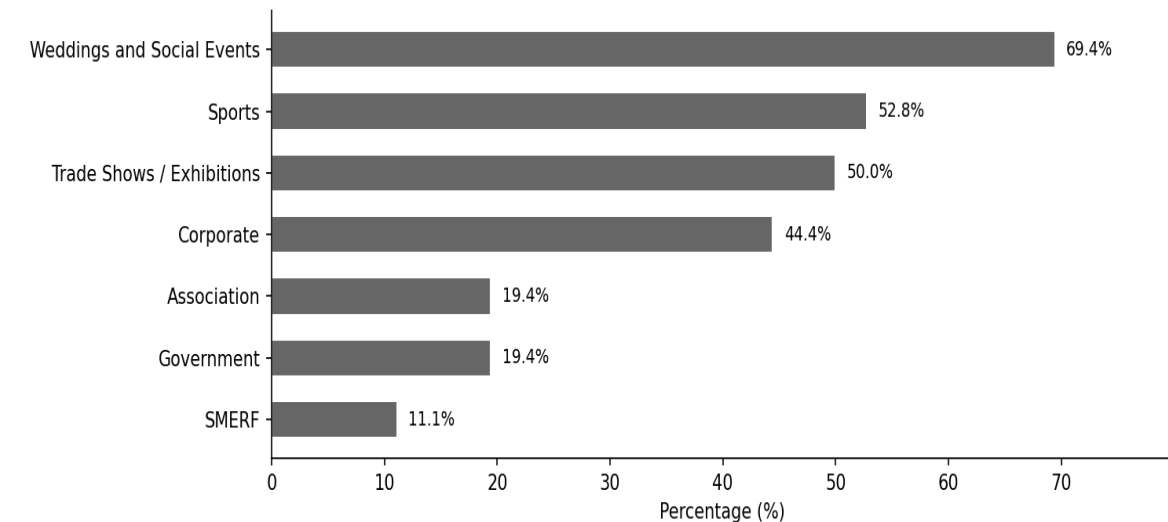
Q: WHAT THE REGION IS MISSING

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Q: GROUP BUSINESS EXPANSION

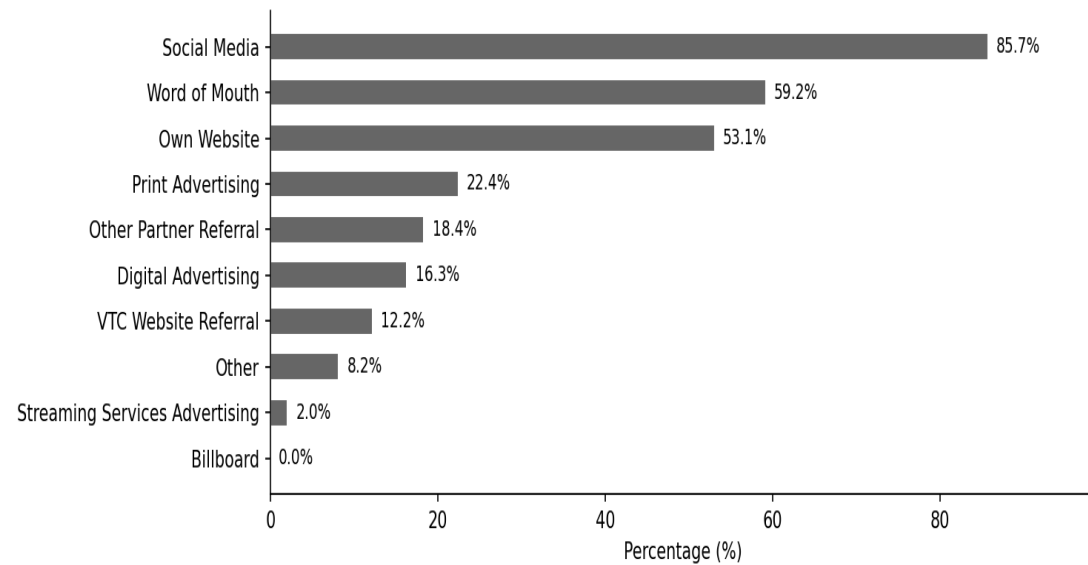
77.08% of respondents indicated the region should expand its offerings for group business. Among those who supported expansion, the following segments were identified as having the greatest potential:



Southwest Virginia: Heart of Appalachia Regional Survey Results

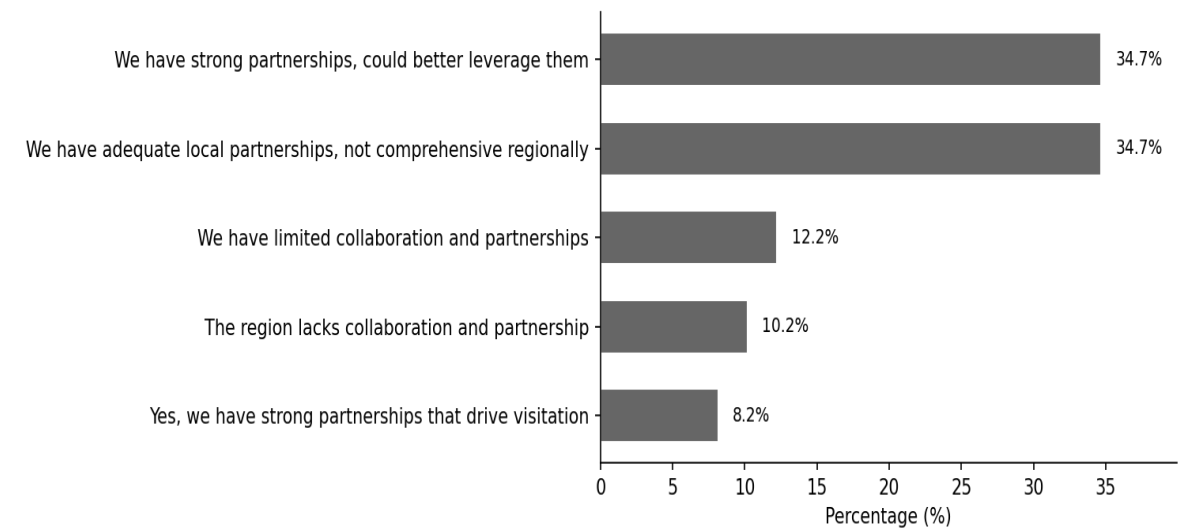
Q: HOW VISITORS ARE FINDING YOUR BUSINESS

Stakeholders identified the top three ways visitors discover their businesses.



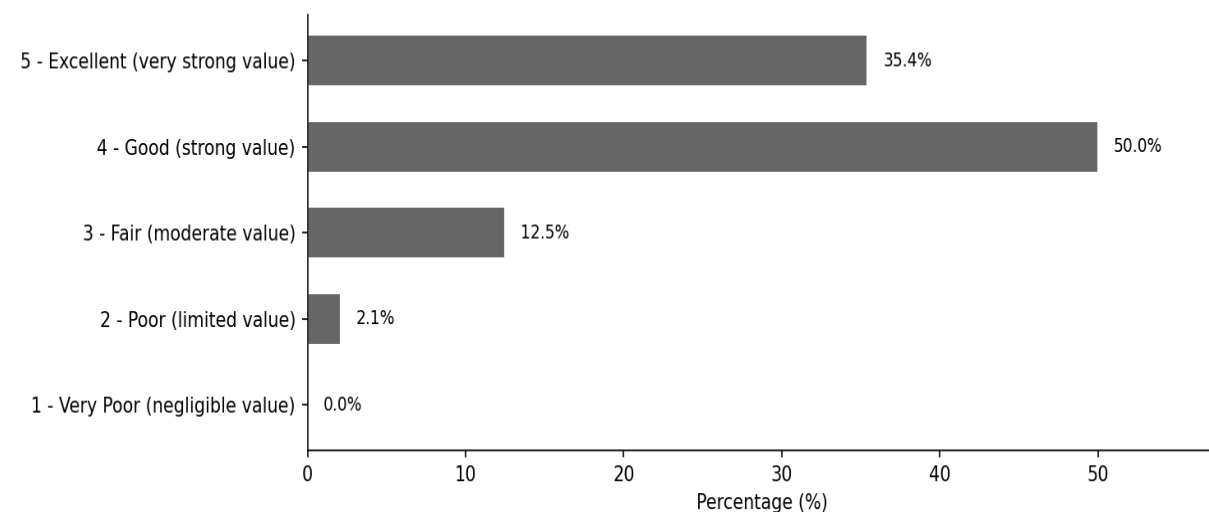
Q: LEVEL OF REGIONAL COLLABORATION

Stakeholders assessed the current level of collaboration and partnerships in the region.



Q: VALUE OF ADDITIONAL REGIONAL ITINERARIES

Stakeholders rated the potential value of developing additional regional itineraries.



Q: STAKEHOLDER PERSPECTIVE

“The region is in a strong position to grow the industry. We have an excellent collaborative culture and consistent views around what makes the region attractive as a destination.”

— Stakeholder, Heart of Appalachia Region



Virginia Mountains Regional Survey Results

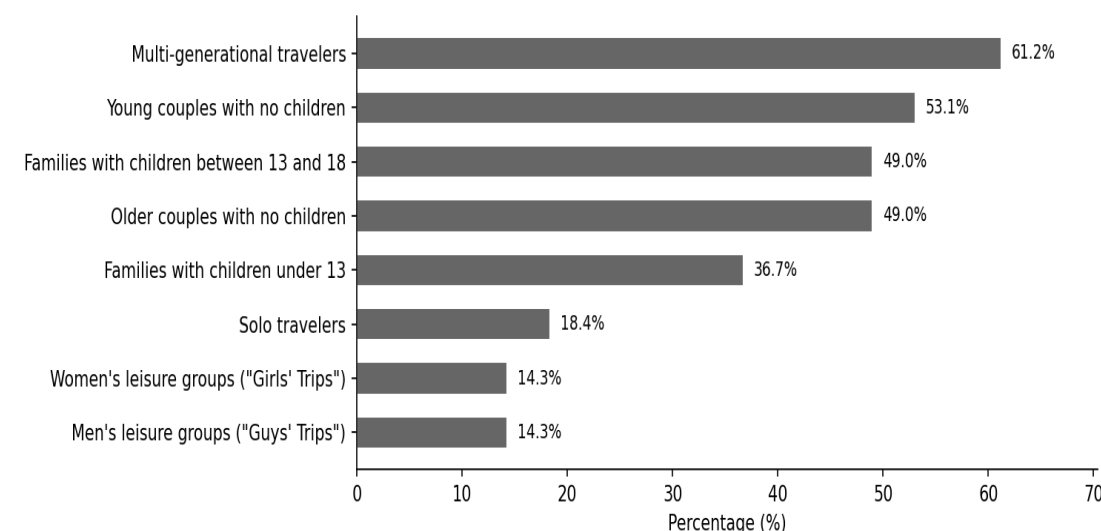
Q: TOURISM ASSETS NEEDED TO ATTRACT MORE VISITORS

Stakeholders ranked what assets the region needs most to increase competitiveness.



Q: LEISURE MARKET SEGMENTS WITH GREATEST GROWTH POTENTIAL

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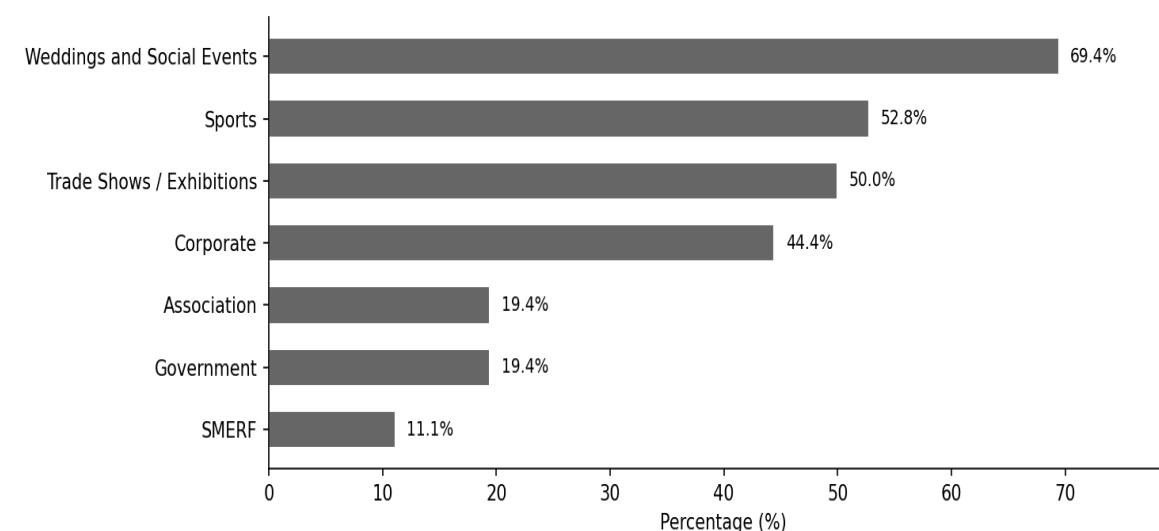
Q: WHAT THE REGION IS MISSING

Open-ended responses about what the region lacks from a tourism product standpoint. Hotels and lodging were the most frequently cited needs.



Q: GROUP BUSINESS EXPANSION

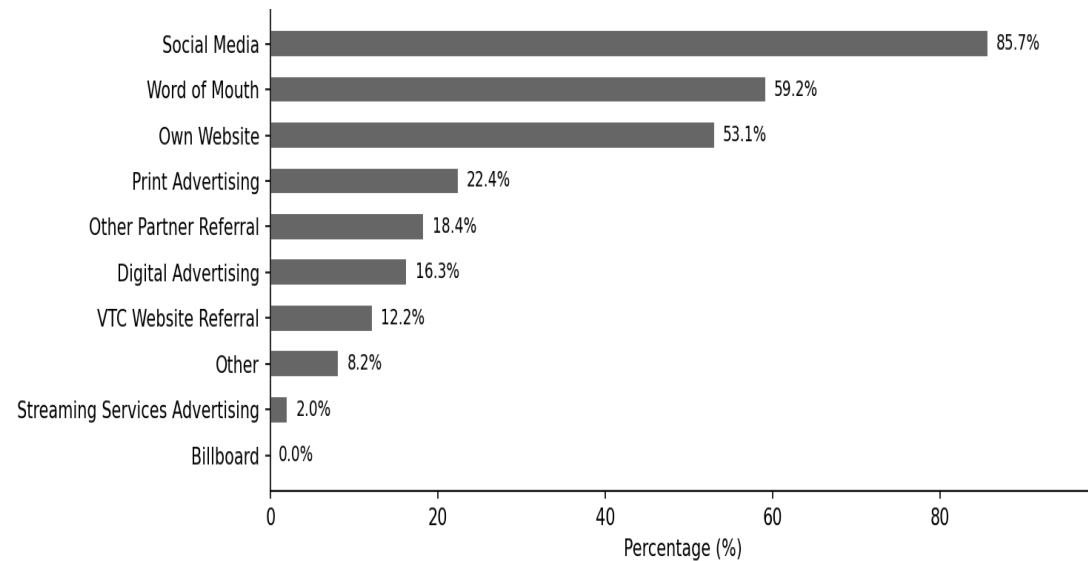
84.29% of respondents indicated the region should expand its offerings for group business. Among those who supported expansion, the following segments were identified as having the greatest potential:



Virginia Mountains Regional Survey Results

Q: HOW VISITORS ARE FINDING YOUR BUSINESS

Stakeholders identified the top three ways visitors discover their businesses.



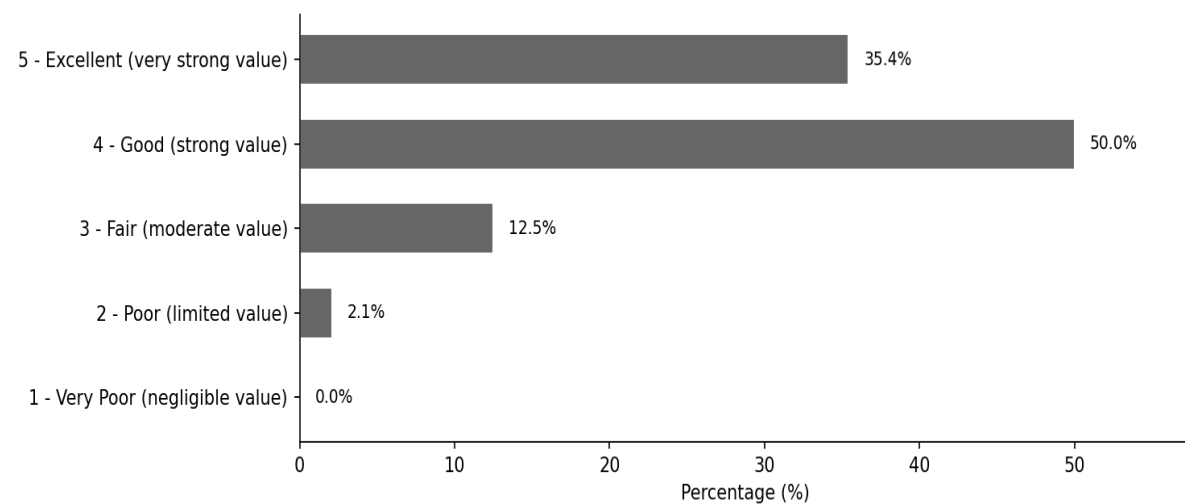
Q: LEVEL OF REGIONAL COLLABORATION

Stakeholders assessed the current level of collaboration and partnerships in the region.



Q: VALUE OF ADDITIONAL REGIONAL ITINERARIES

Stakeholders rated the potential value of developing additional regional itineraries.



Q: STAKEHOLDER PERSPECTIVE

“The village of Warm Springs offers many dining, cultural, wellness as well as agrotourism offerings. However, lacks walkability, interconnection connecting the hotels with activities, thus exposing guests to a sub par experience as they are walking along major route 220. We have tremendous potential to complement our success through stronger regional collaboration and unified marketing strategies that showcase the diversity of attractions across the Virginia Mountains region.”

— Stakeholder, Virginia Mountains Region



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