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DRIVE 2.0

2020-2025 STRATEGIC TOURISM PLAN
REGIONAL PLAN: **CENTRAL VIRGINIA**

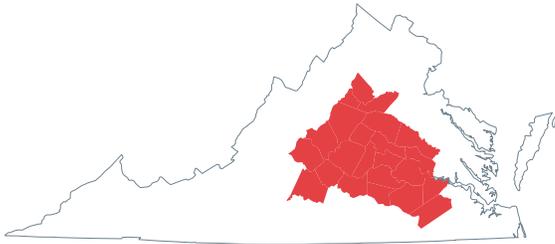
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CENTRAL VIRGINIA INTRODUCTION

The Central Virginia regional plan builds upon the foundational insights established in the 2020-2025 statewide tourism plan, as well as the original 2013 DRIVE Central Virginia regional plan. Developed for every locality within the region to use, this plan provides insights and recommendations on where to focus product development and promotional efforts over the next five years. The plan aims to help spur the growth and impact of travel and tourism for every locality in Central Virginia by increasing tourism products, expenditures, employment and local and state tax receipts.

Plan note: Some assets may have shifted from the 2013 regional plan due to the industry increasing the total number of tourism regions from nine regions to 10.

**All DRIVE 2.0 research was conducted in 2019 and compiled pre COVID-19 Crisis.
Please see vatc.org/coronavirus for COVID-19: Industry Response Toolkit.**



The Central Virginia region includes the cities and towns of Appomattox, Ashland, Blackstone, Charlottesville, Chester, Colonial Heights, Farmville, Hopewell, Lynchburg, Petersburg, Richmond, Scottsville, and Wintergreen as well as the counties of Albemarle, Amelia, Amherst, Buckingham, Campbell, Chesterfield, Cumberland, Dinwiddie, Farmville, Goochland, Greene, Hanover, Henrico, Louisa, Madison, Nelson, Nottoway, Orange, Powhatan, Prince Edward, Prince George, and Sussex.

QUICK FACTS

- Population: 1.76 million (2nd largest of the 10 VA regions)
- Largest town/city: 227,032 (Richmond)
- Interstates: I-64, I-85, I-95
- Route 29, Route 460
- Commercial airports: Richmond International Airport, Charlottesville Albemarle Airport, Lynchburg Regional Airport
- Proximity to urban hubs: Washington, D.C., Hampton Roads, Raleigh-Durham, NC, Charlotte, NC, Greensboro, NC, Winston-Salem, NC, Charleston, WV

TOURISM IMPACT

The Central Virginia region accounted for \$4.3 billion in travel and tourism expenditures in 2018 (approximately 17% of the state's overall travel and tourism expenditures). Year over year, the region experienced an average 4.6% increase in expenditures (in line with the overall Virginia state expenditure growth of 4.4%).

- **Total expenditures:** \$4.3 billion
- **Employment:** 39,958
- **Payroll:** \$928 million
- **Local tax receipts:** \$125 million
- **State tax receipts:** \$169 million

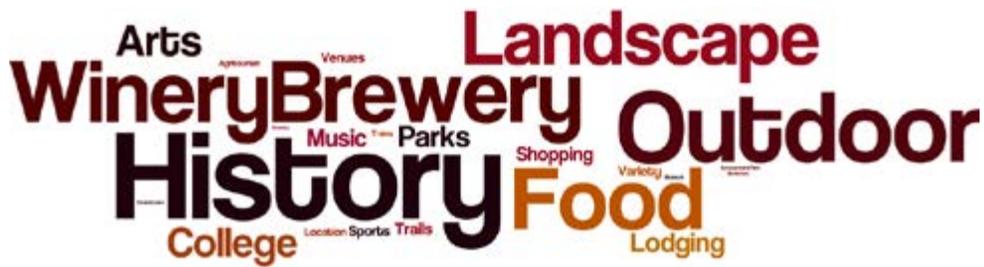
In addition to tourism marketing at the destination level, Richmond Region Tourism, Virginia's Crossroads, and Petersburg Area Regional Tourism engage in regional efforts. The primary promotional efforts focus on history and heritage, food, breweries, and outdoor recreation.



LURES

Central Virginia's history and heritage, food and beverage, and natural and outdoor recreational opportunities continue to be strengths for the region.

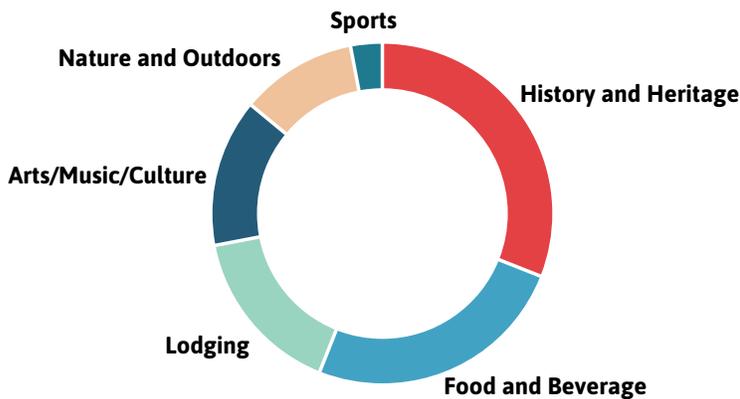
When asked to name a the primary lure for the region, industry leaders identify the following:



With a mix of Colonial, Civil War, and Civil Rights history attractions for families, historians, and educational groups, history and heritage opportunities remain key visitor strengths. Prominent attractions in the region include Monticello, Montpelier, Appomattox Court House National Historic Park, Petersburg National Battlefield, Pamplin Historical Park, the Robert Russa Moton Museum, the American Civil War Museum, and the Virginia Museum of History and Culture, among others. The region's history also extends to the Monacan indigenous peoples. Historical accommodations, such as The Jefferson Hotel and the Craddock Terry Hotel, are available, in addition to a healthy supply of traditional lodging across chain scales, including resorts like The Boar's Head and Wintergreen Resort.

Inventory of Regional Assets

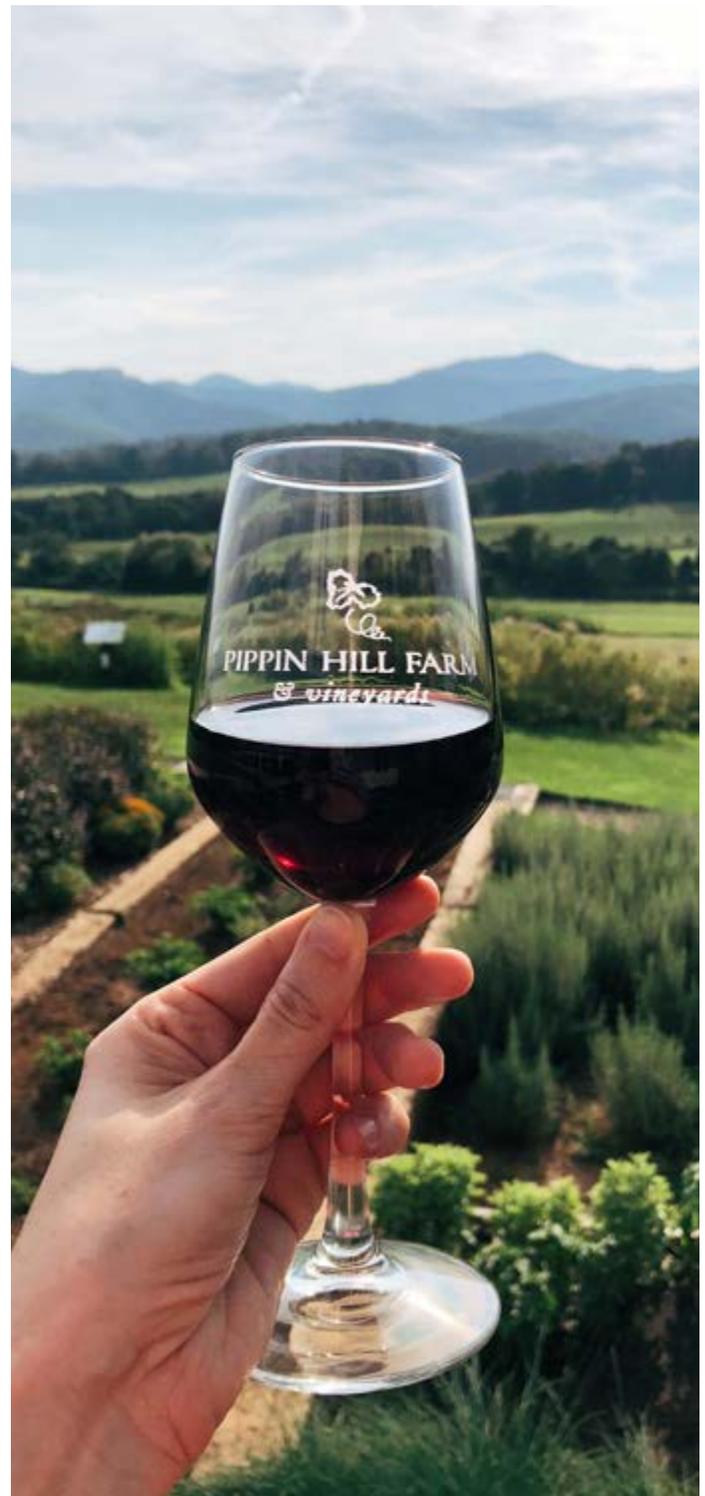
Source: VTC Research



LURES (cont'd)

Rich food and beverage experiences permeate the region in the form of wineries, craft breweries, distilleries, agritourism, and diverse dining experiences. With 62 wineries and eight wine trails, Central Virginia is the second largest area in the state for wine production and a major contributor to Virginia’s national and international recognition within the wine industry. The craft brewery scene has also grown significantly and is now the second largest area in the state for breweries — with 49 (and counting), including national names like Stone Brewing and Devils Backbone, and nationally known cideries like Bold Rock Hard Cidery. Numerous trails allow visitors to explore the brewery scene including Nelson 151, Nelson 29 Craft Beverage Trail, and the Richmond Brew Trail. And distinctive dining experiences can also be found in Richmond and Charlottesville — both of which have received international acclaim for being “foodie” destinations.

Central Virginia also offers opportunities for visitors to experience nature and participate in outdoor activities. The James River, with its distinctive urban whitewater opportunities, as well as the Nottoway River, Blackwater River, Appomattox River, eight state parks, Captain John Smith Trail, High Bridge Trail and the Virginia Capital Trail, allow outdoor enthusiasts to hike, bike, horseback ride, observe wildlife, hunt, fish, kayak, canoe, camp, and enjoy whitewater rafting. Shenandoah Park and Blue Ridge Parkway/Skyline Drive are also major lures for the region.



LURES (cont'd)

Visual and performing arts also diversify the region’s tourism offerings, which is exemplified through venues such as the Virginia Museum of Fine Arts, the Institute for Contemporary Art, the Academy Center of the Arts, Paramount Theater, Wolfbane Productions and others. The region continues to attract well-known musicians, as well as up-and-comers, and more recently, indie, punk, and alternative music have been increasingly popular in areas like Charlottesville, Richmond, and Lynchburg.

Central Virginia is home to many of Virginia’s great towns and cities. Altavista, Ashland, Blackstone, Farmville, Hopewell, Lynchburg, and Orange are all designated main streets by the Virginia Main Street Program. The region’s cities, including Richmond and Charlottesville, contain major colleges such as the University of Virginia, University of Richmond, and Virginia Commonwealth University, Liberty University, along with several historically black colleges and universities (HBCUs), including Virginia Union University.

For business and group travel, Richmond, as the state capital, attracts government and non-government businesses to the greater area. The Greater Richmond Convention Center, the Richmond Raceway Complex, and large hotels such as the Richmond Marriott, Wintergreen Resort, the Boar’s Head, and Hilton Richmond Hotel & Spa/Short Pump all provide meeting space for large groups.

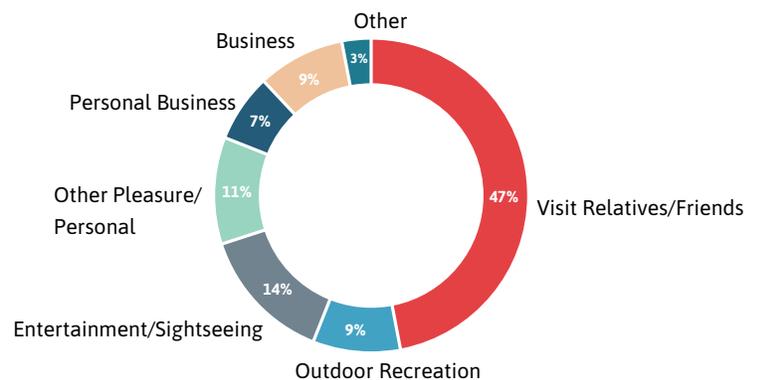
With 34 sports facilities, the region is a popular and growing destination for your sports tournaments. Visitors can also attend a variety of collegiate and amateur sporting events and NASCAR races at the Richmond Raceway.

A popular adrenaline-packed adventure for visitors includes Kings Dominion, located in Doswell, which offers 400 acres packed with more than 60 rides, shows, and attractions. Experiences include 13 roller coasters, Planet Snoopy, and Soak City’s all-inclusive 20-acre water park. In 2018, WinterFest opened as a holiday event filled with millions of lights, festive activities, rides, and more.

HIGHLIGHTS OF REGIONAL LURES

- Colonial, Civil War, and Civil Rights history
- **Virginia Main Streets:** Altavista, Blackstone, Farmville, Hopewell, Lynchburg, Orange, Ashland
- Notable Towns & Cities: Richmond, Charlottesville, Petersburg, Farmville
- Music and the arts
- **State parks:** Bear Creek State Park, High Bridge Trail State Park, Holliday Lake State Park, James River State Park, Pocahontas State Park, Powhatan State Park, Sailor’s Creek Battlefield State Park, Twin Lakes State Park
- Interstate connectivity and airports
- University presence
- Food and beverage, including 62 wineries and 49 breweries, the second largest region in the state for both categories

Past visitors to the region cite the following as the primary purpose of their trip and top activities they participated in during their visit:



Top Activities

Visiting Relatives	28%
Shopping	23%
Historic sites/Churches	18%
Rural Sightseeing	14%
Museums	13%
Visiting Friends	13%
Fine dining	12%
State parks/Momuments	9%
Urban Sightseeing	9%
National parks/Monuments	9%

CHANGES OVER THE PAST FIVE YEARS

Over the past five years, the region has continued to add to its number of wine trails and craft brewery and distillery offerings, in particular. In fact, the region now offers 49 craft breweries, with areas like Richmond, Charlottesville, Nelson County (Nelson 151 and Nelson 29 Craft Beverage Trail), Appomattox, Farmville, Orange, Hopewell, and Amherst contributing major gains in this area. As a result, major breweries like Stone Brewing chose the region for its East Coast headquarters, which opened in 2016, and breweries like Devils Backbone, located in Roseland, Virginia, have seen so much success that InBev purchased it in 2016. Valley Road Vineyards, located in the heart of the Monticello Viticultural Area bottled its first wines in April 2017.

Meanwhile, culinary experiences in the region have also exploded. In 2019 alone, Longoven in Richmond was named one of America's best new restaurants by Bon Appetit for the second time. Yelp listed Richmond as a top 10 food destination and four Richmond chefs and restaurants were named as semi-finalists for coveted James Beard awards. This momentum has spread to surrounding localities in the region, with Charlottesville being named one of the South's best food towns by Southern Living. Farmville and Lynchburg are hopping on the culinary tails with interesting restaurants like Effingham's Restaurant at Hotel Weyanoke and My Dog Duke's Diner in Lynchburg.

The arts scene has experienced significant growth as well, as both Lynchburg and Ashland have renovated their local theaters to welcome live performances, films, concerts, and other events. The Historic Academy of Music Theatre reopened in Lynchburg in 2019 after closing in 1958, and seats more than 800 patrons. Wolfbane Productions, a professional, nonprofit theater and entertainment company serving the Greater Appomattox area, including Lynchburg, Farmville, and Danville, has solidified its place in the performing arts scene providing Broadway-style live entertainment experiences and cultural events. In April of 2018, Virginia Commonwealth University's Institute for Contemporary Art opened to the public. The Virginia Museum of Fine Arts just welcomed a bold new piece of artwork — Kehinde Wiley's "Rumors of War," an eight-ton, 29-foot-tall bronze equestrian monument.





CHANGES OVER THE PAST FIVE YEARS (cont'd)

Numerous unique lodging opportunities have opened throughout the region. In 2018, Farmville welcomed the opening of the boutique Hotel Weyanoke. The Virginian Hotel in Lynchburg was thoughtfully restored to its historic grandeur and refreshed with modern amenities, including a rooftop bar and restaurant. Bella Rosa Plantation, also in Lynchburg, built a honeymoon treehouse onsite through a partnership with Animal Planet's Treehouse Masters. Sandy River Adventure Resort in Farmville offers guest lodging in three charming log cabins, a cottage, and new luxury glamping tipis.

In addition, the region has made strides in outdoor, sports, and other recreation, as Henrico County and Richmond worked closely with localities in the Hampton Roads region to develop the 52-mile Virginia Capital Trail with huge success. Now, efforts are underway to connect a trail from Ashland to Petersburg. Similarly, Friends of the Lower Appomattox River (FOLAR) is working with localities to continue development of the Appomattox River Trail, a proposed 23-mile trail system that links City Point in Hopewell with Lake Chesdin in Dinwiddie through six different jurisdictions. And areas like Lynchburg are continuing to build sports programming to complement the growing sports tourism efforts in Richmond and Roanoke.

Richmond International Raceway completed a \$30 million infield redevelopment project and launched during the NASCAR playoff weekend in September of 2018.

Finally, small town experiences are also growing in appeal, with investment in cultural activities, lodging, and outdoor experiences in places like Ashland, Farmville, Lynchburg, and Petersburg leading the way.

FUTURE PRODUCT OPPORTUNITIES

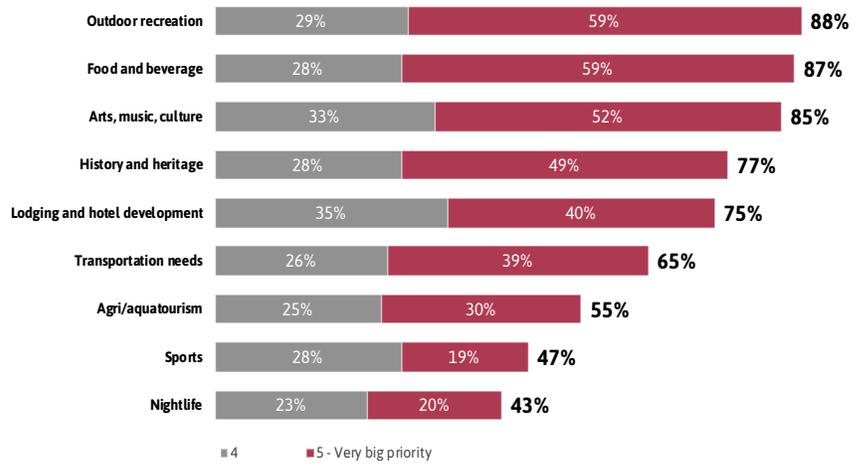
According to the Virginia Office of Outdoor Recreation, Virginia’s outdoor recreation industry contributes nearly \$22 billion annually to the Virginia economy and supports the livelihood of more than 197,000 Virginians. In addition, outdoor recreation is cited by one in four Virginia visitors as one of their top trip purposes.

In recognition of this impact, Central Virginia’s tourism industry leaders identify outdoor recreation as the top priority need — particularly when it comes to better understanding how to develop and promote outdoor product offerings and experiences.

An inventory of Central Virginia’s outdoor assets and infrastructure reveals that the region has an ample supply of activities, with more rivers and streams (21) and lakes (47) than any other region, a large number of state parks (8) and national parks (10), 51 outfitters, and 43 camping and RV parks, just to name a few.

Finally, as communities continue to grow their tourism product offerings, demand for various lodging types will increase as well, which will make continued focus on this area vital. Already, there are some excellent projects underway — The Kirkley Hotel in Lynchburg has begun a multi-year renovation; the Quirk Hotel opened a second location in Charlottesville in early 2020; Devils Backbone Camp in Nelson County recently opened its renovated 71-site campground that is within walking distance to the Devils Backbone Basecamp, Brewery and Distillery; and Beech Grove Cabins, also in Nelson County, opened in fall of 2019, and offers log cabins conveniently located next to the region’s craft beverage trails, hiking, and outdoor recreation assets.

When asked to what degree are the following a priority for your region, industry leaders responded:



Since the region boasts more sports-related assets and major sports facilities than any other region, sports tourism is likely to grow as a strength for Central Virginia, as it remains an identified priority for many localities within the region. Lynchburg, for example, is in the process of developing a sports tourism marketing initiative. In May 2019, a strategic plan was completed, and a working group is now looking into recommendations for facility, event, and organizational development enhancements with the aim to drive additional overnight stays and ultimately have a greater economic impact on the city.

Similarly, Dinwiddie has recognized an opportunity to tap into the region’s motorsports reputation. While motorsports remain a major asset for the region, NASCAR continues to report struggles with event attendance. To help curb this trend, the Southern Virginia region is working to establish the Southern Virginia Racing Partnership, which will create itineraries to attract race fans to its tracks and entice them to stay longer. Dinwiddie is one of the localities targeted to be a part of this effort.

When asked to name a potential game changer for the region, industry leaders identify the following:



FUTURE PRODUCT OPPORTUNITIES (cont'd)

Historic trail development has gained recent focus in areas with a high number of related sites to the Lewis & Clark Western Migration route. From Albemarle to Bristol, partners have gathered to discuss developing the Lewis & Clark Eastern Legacy Trail. In 2019, these partners received portrait signage markers from the Lewis & Clark Trail Heritage Foundation in an effort to provide support to sites with a recognized Lewis & Clark connection.

In addition, industry leaders identify food and beverage, as well as arts, music, and culture, as primary focus areas for the region, as these are the assets that make up vibrant communities and build upon the region's growing reputation in these areas.

Sussex County has found greater regional connectivity through the new Salty Southern Route, which was established in 2019 as a partnership among localities to develop a marketing campaign promoting peanuts and pork, including restaurants that serve these items as signature dishes on the "trail." Connecting these assets was a goal of the 2013 DRIVE effort, and the program was recently awarded a VTC Marketing Leverage Program Grant, which should allow for continued focus and effort to build the route with more partners and attractions to enrich this unique and differentiating niche experience.

Strengthening downtown areas can help in this regard, and in the Town of Farmville, municipal leadership, local businesses, and citizens are coming together to develop a river walk system that will highlight the natural features of the Appomattox River and create alternative walkability throughout downtown Farmville. Meanwhile, continued development of their Main Street remains a strategy in making Farmville a premiere destination in the region.

AREAS OF FOCUS

Based upon Drive 2.0 research and in consideration of the tourism situation, Central Virginia should focus on the following primary and secondary product opportunities.

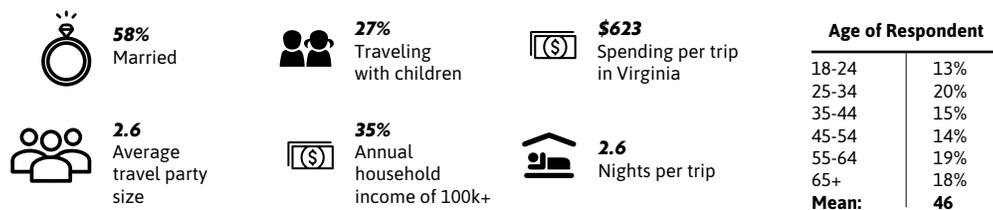
- **Primary:**
History and heritage, outdoor recreation, sports, libations (wineries, breweries, distilleries, etc.), food, lodging (both large-scale and unique/boutique), and river development.
- **Secondary:**
Trails, art, music, conferences/meetings, agritourism, and transit/connectivity.





CURRENT VISITORS

According to research collected by VTC and TravelTrakAmerica, the primary visitors are:



EMERGING NICHE MARKETS

As the region examines ways to broaden its customer base, keep in mind the key demographic reality facing Virginia and the country today and in the immediate future. Right now, minority children are being born at a higher rate than white children, and by 2044, the country’s combined minority populations will comprise the majority of the total population. The shift toward a more diverse, pluralistic society is already underway, and making everyone feel welcome can become a differentiating attribute and strategic advantage, appealing to a broader demographic base of potential visitors.

In 2017, 4.5% of the U.S. population identified as LGBTQ, and data suggests this segment travels more and spends more. The #LoveVA campaign authentically resonates with the values of this community and capturing this opportunity market hinges on destinations being inclusive — whether it be through hosting Pride events or simply promoting your region as open and welcoming to all.

In addition, operators across the board are showing significant increases in female visitation, especially in outdoor and active travel experiences, which represents another opportunity to increase the region’s customer base. So, whether promoting a girl’s trip or a solo adventure, a heightened focus on female travelers may also prove beneficial.

EMERGING NICHE MARKETS (cont'd)

Building equity in your region as a diverse and inclusive place to visit, as well as one with appeal for women travelers, will be greatly aided by finding and enlisting ambassadors who can speak to these values and attributes. And, since nearly half of visitors travel to spend time with family and friends, having residents know about local attractions will enhance the visitor experience and assist localities in realizing the value of tourism.

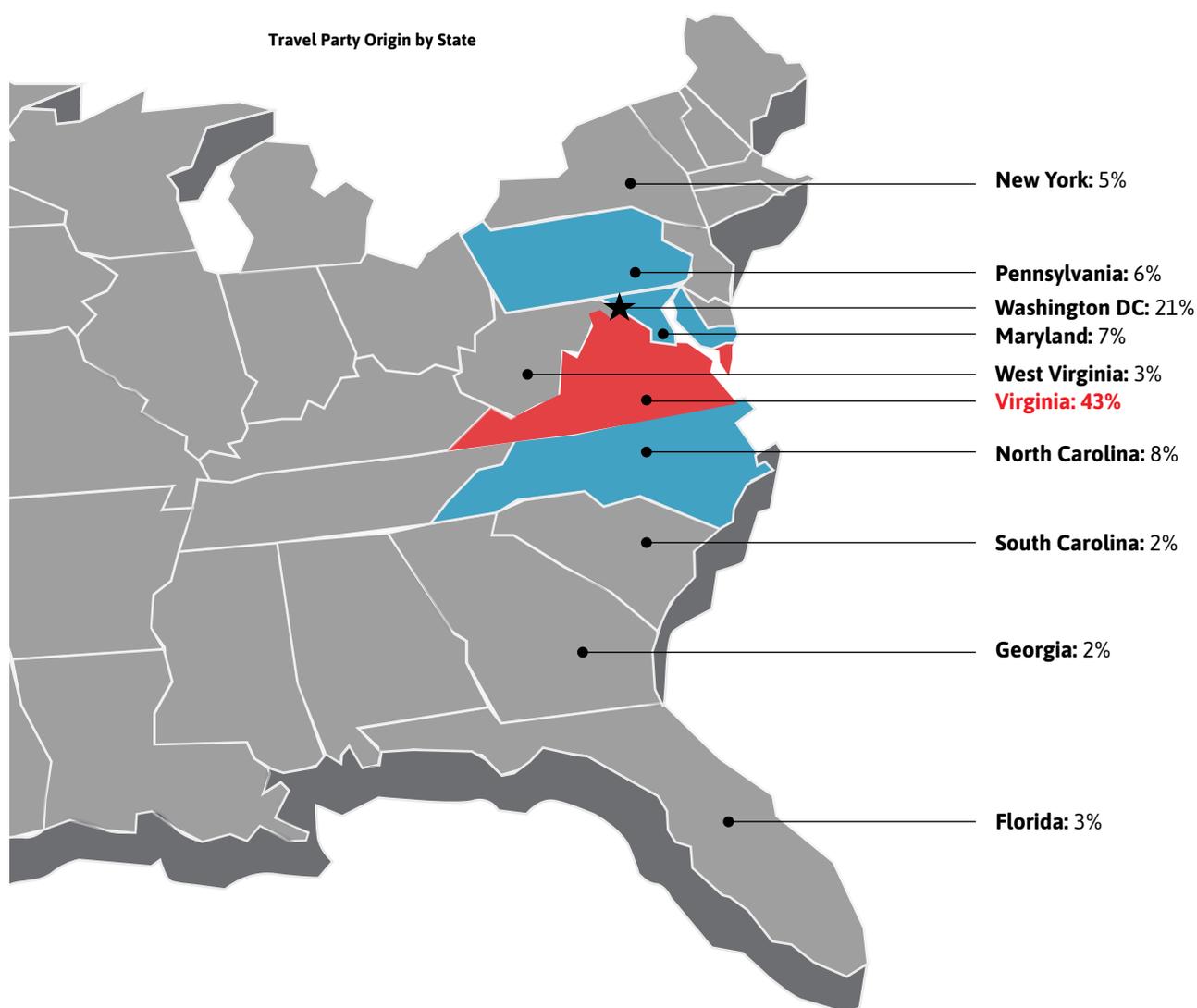
Additional opportunity audiences based on growing trends include:

TRENDS	OVERVIEW	IMMEDIATE IMPLICATIONS FOR CENTRAL VA
<p>BLACK HERITAGE</p>	<p>Today's Virginia tourism customer base is predominately white. To increase the trajectory of tourism expenditures across Virginia, we must broaden our appeal to broaden our customer base. One critically important audience is the Black segment. According to Mandala Research, Black visitors spent nearly \$63 billion on tourism in 2018, up almost \$20 billion since 2010, from \$48 billion.</p>	<p>Virginia's history is complicated and can often feel unwelcoming to the Black population. Virginia was the starting place for the Black experience and the Black story. It is our responsibility to lead how we commemorate what was and celebrate what's new. Localities throughout the region have a compelling story to tell — whether it's Revolutionary War, Civil War, Civil Rights or the impact of Black culture today in creating vibrant communities — and Central Virginia has an opportunity to reposition many of its historical assets using a new lens on how the Black travel segment views its history and what they want from historical assets. Many attractions are already exploring these narratives, but what's even more compelling is to thread the themes across localities to explore a larger and more compelling narrative.</p>
<p>OUTDOOR RECREATION</p>	<p>The outdoor recreation industry contributes nearly \$22 billion annually to the Virginia economy and supports the livelihoods of more than 197,000 Virginians. Outdoor recreation is cited by one in four Virginia visitors as one of their top trip purposes. And, this year Virginia established the Office of Outdoor Recreation, placing even more importance on this industry.</p>	<p>Virginia is experiencing a rising tide when it comes to outdoor recreation. It is overwhelmingly the biggest focus for industry leaders across the state. And with the new state office in place, we should strike while the iron is hot. The Central Virginia region should pour resources into trail related development both land-based and water-based.</p>
<p>CULTURAL HERITAGE</p>	<p>History is one of Virginia's biggest assets. But it is not just about names and dates, it's about the cultural impact these historic events have on the community. Whether it is music, agriculture, crafts, or politics, Virginia is full of rich cultural heritage experiences.</p>	<p>Packaging historic assets as experiences that highlight the cultural impact on our lives today is key to keeping history relevant and authentic to today's diverse tourism audience. Threading themes across localities can create an even more compelling and impactful story.</p>

GROWING OPPORTUNITY OF NEARBY DRIVE MARKETS

National tourism trends suggest leisure travel is now a year-round activity, with shorter, more frequent trips taking the place of traditional week-long summer vacations. This translates into the increasing value and impact of near versus far-away markets.

With the average trip length of 2.6 nights, the Central Virginia region is no exception, and according to a TravelTrakAmerica survey, the majority of Central Virginia travelers (58%) originate from nearby drive markets — Virginia, North Carolina, and Maryland. This concentrated primary feeder area gives all of the Central Virginia’s destinations and industry leaders an opportunity to work closer together in promotional planning to target prospective visitors.



COMPETITION

Given Central Virginia’s primary history and heritage, food and beverage, and outdoor recreational lures, the primary competitors identified through this effort include Washington D.C., Asheville, N.C., and Charleston, S.C.

Additional opportunity audiences based on growing trends include:

COMPETITOR	PRIMARY LURES
WASHINGTON, D.C.	<ol style="list-style-type: none"> 1. History (monuments/memorials/museums) 2. Neighborhoods 3. Restaurants
ASHEVILLE, NC	<ol style="list-style-type: none"> 1. Outdoor recreation 2. Lodging 3. Food, beverage, arts
CHARLESTON, SC	<ol style="list-style-type: none"> 1. Small town 2. History (Black heritage) 3. Restaurants

North Carolina’s wine industry, rising culinary scene, and rural experiences present many similarities to Central Virginia. Asheville, for example, has been recognized for its dining experiences, as it’s known as the first Foodtopian Society, with many local farm-to-table restaurants, high-profile chefs and restaurants, and craft breweries. Asheville’s surrounding area in northwestern North Carolina also boasts outdoor recreation, including rafting, zip lines, fishing, and camping. Charleston, meanwhile, also offers historic character and attractions along with its acclaimed food scene and outdoor recreation opportunities. And in D.C., history, interesting neighborhoods, and food and beverage represent another hard product mix to compete against.

In appealing to prospective visitors, Central Virginia destinations and travel attractions must realize that competing head to head from a siloed or individual experience perspective is less effective than the hub and spoke method of bundling experiences together. History alone cannot compete with D.C. Outdoor alone cannot compete with Asheville. And food alone cannot compete with Charleston. However, Central Virginia, with its distinctive mix of rich history, culinary assets, culture, and nature experiences, is well-positioned to compete. This is the hub and spoke method in action.

REGIONAL CHALLENGES (VOIDS)

The 2013 regional plan explored the challenge of the region’s history-related themes overshadowing the diversity of assets the region offers. This remains a challenge today; however, it seems to have been somewhat minimized with the rise of craft breweries, culinary experiences, and arts, music, and events. That said, promoting the variety of activities to be found should still be considered a primary focus.

Despite the diverse assets of the region, there continues to be somewhat limited attraction and destination connectivity. Central Virginia is a large region containing three key centers with Richmond, Charlottesville, and Lynchburg. The addition of trails such as wine, beer and Civil War trails, helps with connectivity, but these are just a start. Outdoor recreation is a big opportunity to help increase connectivity across localities, especially with the development of new bike trails and river trails.

In terms of transportation, congestion remains a challenge in connecting to the D.C. area. This diminishes the potential for cross-visitation among destinations and may be a potential limiting factor for future tourism growth in the region.

AREAS OF FOCUS

- As a region, diversity in experience, yet recognition of other assets may be overshadowed by overarching history-related themes
- Somewhat limited attraction/destination connectivity
- Transportation congestion in connecting with D.C./Northern Virginia area

TRENDS	OVERVIEW	IMMEDIATE IMPLICATIONS FOR CENTRAL VA
<p>AGING POPULATION</p>	<p>The age wave is washing over Virginia. Over the next 14 years, America’s 65+ population will increase by roughly 60%, growing from 10 to 20% of the total population. Nationally, we will have 74 million people over the age of 65, compared to only 46 million today. Some counties of Virginia will experience a dramatic increase in seniors, where up to 40% of the population will be 65 or older.</p>	<p>Recognize Baby Boomers (today’s new seniors) as an increasingly important tourism segment; however, it is important to understand that they won’t be looking for the types of experiences their parents sought. The region should work to make attractions and destinations more appealing to Boomers and their desires to stay active and enhance their vitality. The region’s excellent outdoor and nature experiences, along with space, should be very appealing to this audience.</p>
<p>TRANSPORTATION SYSTEM</p>	<p>Ability to grow and prosper is due in no small part to having one of the best transportation systems in the country. Over the next five years, significant transportation improvements will be realized on the I-95 and I-64 corridors, including a new tunnel at the Hampton Roads Bridge-Tunnel. In December 2019, Governor Northam announced a \$3.7 billion agreement for the state to buy 225 miles of track and build new passenger rail improvements.</p>	<p>The vast majority of visitors use an automobile to get around Virginia during their trip. Having connected and easy access with minimal congestion is an important part of the overall experience. Situated along both I-95 and I-64, the Central Virginia region can often be impacted by traffic congestion in all directions. And while efforts are underway to make vast improvements, this must continue to be a priority knowing there will be continued population growth throughout the region. There is an opportunity with Amtrak as well which provides connectivity from Central Virginia up to D.C. and beyond.</p>

REGIONAL OPPORTUNITY

Bundling or packaging experiences for potential visitors' consideration continues to gain traction. According to TripAdvisor, "[they're] seeing more travelers balancing their itineraries with a mix of classic sightseeing and more unique local experiences." Central Virginia's travel and tourism efforts may be behind this trend, as existing assets appear to be siloed, with few regional cross promotions, connectivity, or packaging of complementary experiences. This lack of cohesion is especially true between towns and cities across the entire region.

Another mounting challenge is the degree that history is one of the region's major draws. There is a growing body of travel research that suggests history and cultural heritage sites continue to become less appealing, especially to the younger generations of travelers — Gen X and Millennials. As such, Central Virginia's heritage tourism assets must work together to make history as appealing as possible to as wide an audience as possible.

Black heritage is a big opportunity for the region. In addition to the numerous heritage sites related to Colonial and the Civil War eras, there are unique stories related to the Civil Rights era

that tell a unique story. In Lynchburg, Pierce Street Renaissance Historic District includes the history and home of Dr. Robert Walter "Whirlwind" Johnson, an International Tennis Hall of Fame inductee who founded a Junior Tennis Development Program, coached Wimbledon champions Althea Gibson and Arthur Ashe. In addition, the Moton Museum in Farmville is the only Virginia site, along with the statue of Barbara Johns in Richmond, that is on the U.S. Civil Rights Trail. In the just the last year, the renovated Black History Museum and Cultural Center of Virginia opened at a new location in Richmond with the mission to preserve stories that inspire. As stated on the center's website, "We remember the courageous and popular stories of Harriet Tubman, Rosa Parks, and Martin Luther King, but there are many, many more." And, the Commonwealth is celebrating the remarkable life of Harriet Tubman with the release of the movie *Harriet*, filmed entirely in Virginia.

Finally, the region's outdoor assets and infrastructure present ample opportunity for travel and tourism industry leaders to collectively formulate and orchestrate outdoor product development plans and initiatives.



REGIONAL OPPORTUNITY (cont'd)

Additional opportunities for the region based on growing national trends, include:

TRENDS	OVERVIEW	IMMEDIATE IMPLICATIONS FOR CENTRAL VA
MINI-CATIONS	According to Allianz, over half of Americans last year did not take a vacation longer than four nights. Millennials are leading this movement.	Campaigns like the recent Crush Friday can take advantage of this trend. Consider other marketing campaigns and packages that encourage younger generations to take their vacation for a long weekend trip. With the average trip length at 2.6 nights, mini vacations should be a natural opportunity for the region to pursue.
SHIFTING FOOTPRINT	The country's population growth over the past century has been concentrated in urban and suburban areas. Likewise, 80% of Virginia's population growth is projected to occur in the "Golden Crescent" corridor that runs from D.C. through Northern Virginia, Richmond, Williamsburg, and Hampton Roads. This growth in urban areas is being accelerated by Millennials, who prefer downtowns, activity centers, and 15-minute "livable" communities close to everything, meaning many western counties in the Commonwealth may continue to lose population and industry.	The Central Virginia region is already experiencing population growth. Not all regions are as lucky, and Central Virginia communities should work together to develop a coordinated plan to manage and better take advantage of this growth, which will have positive and negative impacts. While it will increase vibrancy, and hopefully add new businesses and economic growth, it also means more congestion and higher property costs, etc. The industry should come together to develop a plan for how travel and tourism can take advantage of this opportunity.
RISE OF MUSIC TOURISM	According to Billboard, 32 million people attended music festivals in 2018. Virginia has a strong and unique music heritage (country, bluegrass, beach, alternative, hip hop, heavy metal, pop rock), and a growing number of music festivals like Bristol Rhythm n' Roots, Lockn', Something in the Water, and FloydFest, just to name a few.	Music and music heritage is a core identity of Virginia, and Central Virginia is no exception. It's both authentic and it's experiential — two essential traits travelers seek. There are old and new festivals and potential for new venues. Leverage these assets, events, and experiences as a way to tell the story of the region and of Virginia and keep people coming back to their favorite music destination and experiences.
VALUE TOURISM	Virginia is increasingly being known for affordable travel experiences. In fact, Williamsburg was named as a top 10 most affordable vacation in the U.S. in 2019.	Find ways to promote free and affordable experiences. These messages will tie-in well with promoting outdoor recreation and beach experiences. Vacations can be equally exciting and affordable no matter where they travel in the region.
CAMPING	Camping and glamping is increasingly popular, especially among Millennials. Moreover, they prefer these trips to be within 100 miles from where they live.	This is another trend that will fall in line with the growing outdoor recreation focus. Consider ways to highlight camping trips of all kinds – the off-the-beaten-path to a unique view, or the best of both worlds trip with a hike, a craft brew and a campsite under the stars.
SPORTS	Sports tourism is one of the fastest growing travel industries. Worldwide it equates to \$7.68 billion. The Travel Industry of America reports that nearly 40% of American adults each year travel 50 miles or more to a sporting event. But it's not just attending sporting events, it's also hosting youth tournaments and providing venues that attract year-round events drawing hundreds, often thousands of visitors.	While the Commonwealth does not support any major league sports teams, the state is beginning to hone its focus on sports tourism. Central Virginia is no exception. Whether it's popular college sports or hosting large sports tournaments, there are great opportunities for the region to take advantage of.

PROMOTIONAL RECOMMENDATIONS



RECOMMENDED PRIORITIES

Based on the situation and analysis of the Central Virginia region, the following set of recommendations are offered in order of priority:

1. **Connect and promote Central Virginia's outdoor experiences.** While almost every town and city across the region are improving their outdoor products to appeal to outdoor enthusiasts, there is an opportunity to build an even greater set of experiences by connecting each submarket's offerings. Central Virginia's outdoor attractions and destinations should band together to create even more connected experiences.
 - **Bike Trails:** Statewide, bike trails are connecting sites and experiences across multiple jurisdictions. The 52-mile Virginia Capital Trail is the largest example, connecting the Commonwealth's past and present capitals. The New River Trail State Park meanders 57 miles through four counties while paralleling the river for which it's named. The Heart of Appalachia Bike Route is 128 miles of roads and trails in Tazewell, Bland, Russell, and Wise counties. Industry leaders should think not only think about more inter-jurisdictional trails, but the network for local feeder trails.
 - **Water Trails:** Central Virginia is home to 21 rivers and streams, more than any other region. No wonder numerous stakeholders in Central Virginia reference riverfront development and enhanced river experiences as a future opportunity to create more outdoor experiences for the region's visitors. Working together, the DMOs of Central Virginia can tie rivers together into world-class water experiences.

To get inspired about how to formulate a regionwide product development plan, see DRIVE 2.0's How To Guide #2: Enhance Experiences.



RECOMMENDED PRIORITIES (cont'd)

2. **Collectively, breathe new life and meaning into history and heritage assets.** Given the number of major historical attractions in the Central Virginia region and the slow decline in the appeal of heritage tourism, the entire region’s historical attractions should come together to create more cross promotions and shared guidelines on how to respectfully give our history more of an edge by presenting Virginia’s history plus. This could include:

- Packaging relatable personal stories
- Making history more personal by connecting with and appealing to what’s on travelers’ minds and in their hearts today
- Building in suspense
- Keeping it fresh

Consider what could happen if the region worked to combine the history and experiences of Richmond, Charlottesville, Farmville, and Lynchburg, just to name a few. With one in four Black Americans having roots in Richmond, this is a compelling opportunity. From those roots, to the changing tide in Farmville with Brown vs. the Board of Education (Moton Museum), to the vibrant culture today among the Black people across the region, Central Virginia has a strong story to contribute. Now it’s time to tie it all together using a hub and spoke method.

To learn more about how to package and present history plus, see DRIVE 2.0’s How To Guide #1: Tell and Sell Your Story.

3. **Bundle and package experiences using the hub and spoke method to increase the overall appeal of individual attractions and offerings.** Overall, the region’s primary lures should adopt a packaging perspective to increase average spending and room nights in Central Virginia. Focusing on just one lure will make it more challenging for the region to compete against similar offerings in other states.

The region has the right lures that make up vibrant communities. For example, a weekend itinerary could allow visitors to paddle board on the river, brewery hop, catch a concert, and stay in a boutique hotel with a top restaurant. Actual tours that combine a history-themed bike tour one day and a brewery tour the next also hold potential. In essence, more deliberate thought about how to bundle experiences across localities to increase the unique experience may encourage people to turn their day trip or overnight into a two- or three-day trip.

PRODUCT DEVELOPMENT RECOMMENDATIONS

HUB & SPOKE

In considering all of the research to date, the following development hub and spoke approach is recommended for the Central Virginia region as a whole:



Exercise: See which trends support this development hub & spoke.

TREND 1

TREND 2

TREND 3

VISION FOR CENTRAL VIRGINIA

The vision for the Central Virginia regional plan is to collaboratively build upon the historical and heritage assets in an authentic manner and to further develop outdoor recreation, food and beverage, and arts, music, and culture — the foundation of vibrant communities — to sustainably maximize the region’s tourism potential.

SUMMARY

The Central Virginia region has incredible opportunity, and through increased collaboration, teamwork, and a common vision across jurisdictions, the region can be even more competitive with nearby destinations in North Carolina, D.C., and South Carolina. The communities and assets are there, but regionalism is key to growth. Through better connectivity and cohesion, together we can take the entire region to the next level.





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