

**VIRGINIA
IS FOR
LOVERS[®]**

***STATEWIDE TOURISM PLAN
VA1 Governor's Tourism Summit***

November 2025

hunden partners



WHY WE'RE HERE

The goal of the Virginia Tourism Corporation Statewide Strategic Tourism Plan 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.

PURPOSE AND GOALS



Create a strategic plan that will help VTC's industry partners entice travelers to stay longer in Virginia



Increase Virginia's competitiveness



Support economic development throughout our ten (10) tourism regions



Identify Virginia's top lures that should be promoted now to successfully compete and extend travelers' length of stay



Identify new products that have opportunity to be built to enhance an area's attractiveness

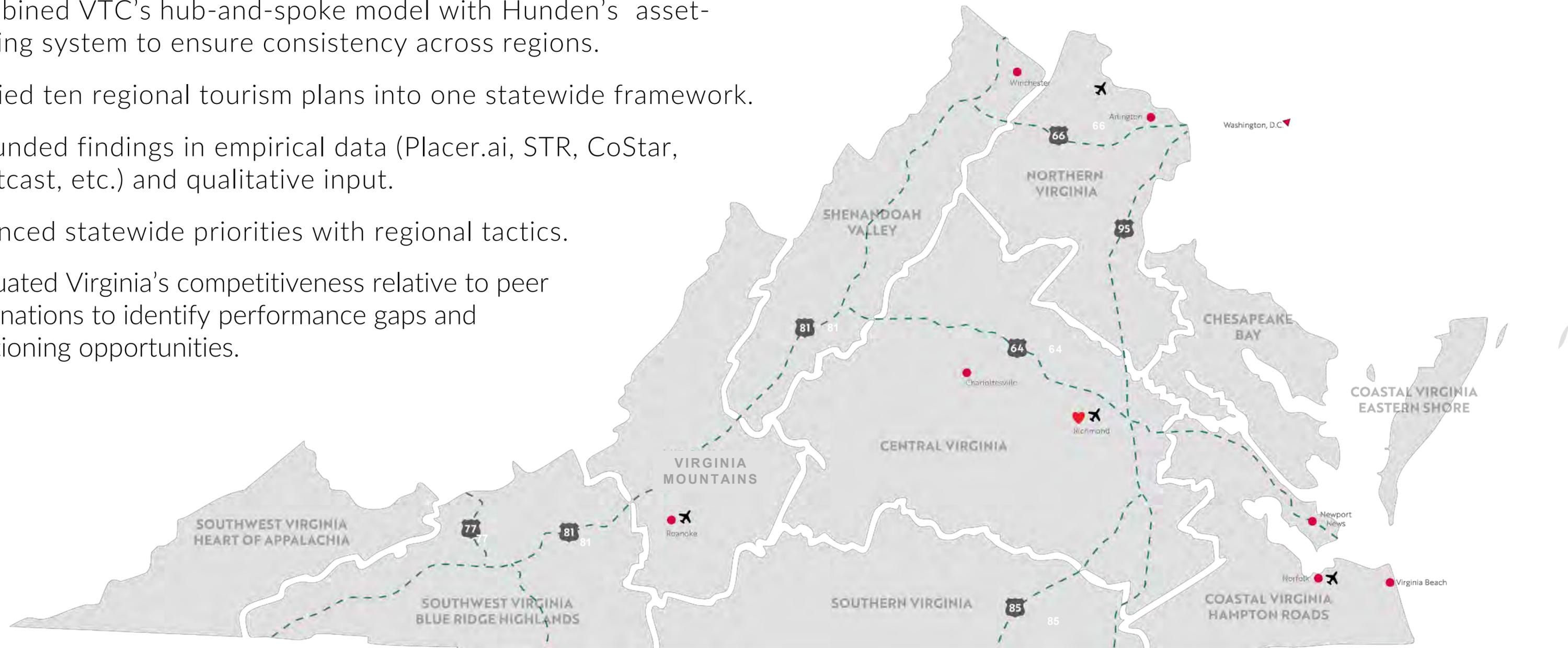
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***Plan Process &
Methodology***

RESEARCH FRAMEWORK

A UNIFIED, DATA-DRIVEN APPROACH

- Combined VTC’s hub-and-spoke model with Hunden’s asset-scoring system to ensure consistency across regions.
- Unified ten regional tourism plans into one statewide framework.
- Grounded findings in empirical data (Placer.ai, STR, CoStar, Lightcast, etc.) and qualitative input.
- Balanced statewide priorities with regional tactics.
- Evaluated Virginia’s competitiveness relative to peer destinations to identify performance gaps and positioning opportunities.



An aerial photograph of a city waterfront. In the foreground, a large, multi-masted sailing ship with red sails is on the water. In the middle ground, a large white ship is docked at a pier. The background shows a city skyline with various buildings and construction cranes. The text "VIRGINIA IS FOR LOVERS" is overlaid in white, with a red heart symbol replacing the letter 'O'.

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Stakeholder Engagement

STAKEHOLDER ENGAGEMENT

COMPREHENSIVE PARTICIPATION ACROSS ALL TEN REGIONS:



15

regional site visits



450+

points of interest visited



180+

in-person meetings



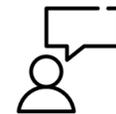
700+

stakeholders personally engaged



30

virtual committee sessions



25

virtual focus groups



1,167

statewide survey responses

Resulting in a **highly inclusive engagement process** across the Commonwealth for statewide planning.

KEY THEMES ACROSS ALL TEN REGIONS:

Product Development

- Need for investment in new and existing assets
- Need for funding mechanisms at state and local levels
- Need to identify private sector partners
- Top product development themes were full-service hotels, family-friendly attractions, cultural assets, outdoor recreation and enhancing trails.

Improve Connectivity Between Experiences

- Creating and enhancing critical mass
- Improving connection between outdoor, cultural and culinary for example
- Enhancing marketing efforts to drive awareness of trails, experiences and drive participation at existing experiences

Alignment Between Regions

- VTC's Destination Development Managers as valuable conduits to the state and to regional partners
- Appreciation of planning process and bringing stakeholders together
- Increasing communication and partnership across and within regions.

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***Product Analysis:
Pillars of Place***

PRODUCT ANALYSIS:

Pillars of Place

PURPOSE

- Craft regional implications on existing product
- Identify strongest assets for visitor attraction
- Identify gaps in product



HOW DO WE DO IT?

VTC POI Review

900

existing POIs
across 10 regions

Categorized into
LURES, HUBS, and
SPOKES

Organize existing POIs into
9 PILLARS OF PLACE categories

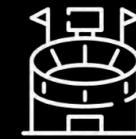
PILLARS OF PLACE



ENTERTAINMENT



HOTELS AND HOSPITALITY



SPORTS



CONVENTIONS AND CONFERENCES



ATTRACTIONS AND GAMING



SHOPPING/DINING, EATERTAINMENT, AND ADULT BEVERAGE EXPERIENCES



RECREATION AND NATURAL ENVIRONMENT



ARTS AND CULTURE



AUTHENTIC ARCHITECTURE AND PUBLIC SPACE

PILLARS OF PLACE ANALYSIS

Methodology

- Criteria has five categories each worth 20 points
- Matrix will identify supply, demand and product gaps
- All POI scores will roll up to their Pillar category and at the regional level
- Results identify product strengths and opportunities in each region



Current Visitor Demand



Event Opportunity



Economic Scale



Accessibility



Uniqueness

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***INDUSTRY
TRENDS***



INDUSTRY TRENDS

Why Trends Matter

Understanding national and global travel trends ensures Virginia invests in the right products to meet future demand. These trends shape how travelers choose destinations, what they seek to experience, and how long they stay.

- The strongest growth segments are **experience-driven**, **wellness-oriented**, and **authenticity-focused** travelers.
- Demand is shifting from sightseeing to immersive participation—activities that combine adventure, culture, and local flavor.
- Economic resilience sits at the high end of the market, where travelers prioritize premium and personalized experiences.
- These patterns directly influence Virginia’s strategic investments in lodging, recreation, and entertainment offerings.

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INDUSTRY TRENDS

Adventure, Nature, and Outdoor Recreation

Outdoor and adventure tourism are leading motivators for travel, aligning directly with Virginia's existing landscape and regional strengths.



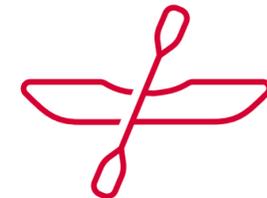
ADVENTURE DEMAND IS BOOMING

Nearly 80 percent of travelers seek multiple adventure trips per year, spending over \$1,000 per trip on average



VIRGINIA'S NATURAL GEOGRAPHY IS AN ADVANTAGE

Blue Ridge, Appalachian Trail corridors, rivers, and lakes already position the state as an accessible adventure destination



ACTIVITY-DRIVEN ITINERARIES EXTEND TRIPS

Travelers stay longer when regions offer a mix of recreation (hiking, paddling, cycling, climbing, etc.) and nearby lodging and dining options

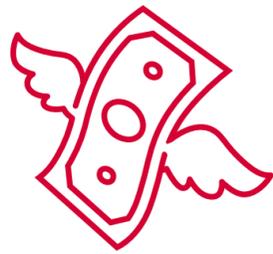
VIRGINIA IMPLICATION:

Create clustered outdoor recreation zones and link them with hospitality and entertainment nodes to maximize trip duration.

INDUSTRY TRENDS

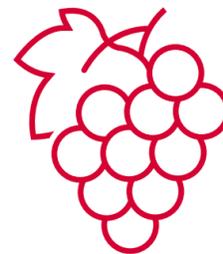
Experience, Luxury, and Wellness

Travelers increasingly value destinations that blend comfort, culture, and personal renewal. This shift toward high-end and experiential travel drives how Virginia should shape its tourism products.



LUXURY TRAVEL REMAINS RESILIENT

Upscale lodging, boutique resorts, and vineyard stays outperform other categories, even during economic fluctuation



CULINARY EXPERIENCES ATTRACT HIGH-SPEND VISITORS

Virginia's strong wine, seafood, and farm-to-table assets can anchor regional itineraries



WELLNESS TOURISM CONTINUES TO EXPAND

Spa retreats, yoga getaways, and nature immersion experiences represent untapped growth.

VIRGINIA IMPLICATION:

Strong potential for boutique resort development, wellness-oriented lodging, and premium food experiences to capture longer, higher-spend stays.

INDUSTRY TRENDS

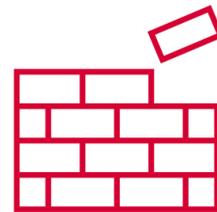
Evolving Traveler Profiles and Preferences

Generational shifts and technology continue to reshape how and why visitors choose destinations. Virginia must remain adaptive to retain market share.



SUSTAINABILITY HAS BECOME A VALUE-BASED DECISION

Over half of U.S. travelers will pay more for eco-friendly lodging or attractions



BOUTIQUE & HERITAGE LODGING OUTPERFORM

Travelers want experiences that reflect local culture and design



CULTURAL, CULINARY, & HISTORICAL DEPTH REMAINS CORE

Travelers expect both comfort and meaning: entertainment balanced with heritage



MILLENNIALS & GEN Z DOMINATE TRAVEL GROWTH

They value sustainability, authenticity, and mobile-first convenience more than traditional amenities

VIRGINIA IMPLICATION:

Enhance Virginia's positioning as an experience-rich, responsible, and distinctive destination that meets evolving visitor expectations.

An aerial night view of a city skyline, likely Richmond, Virginia. The image shows a dense urban area with numerous lit-up buildings, a river in the foreground, and a complex highway interchange on the right. The sky is dark, and the city lights create a warm, glowing atmosphere.

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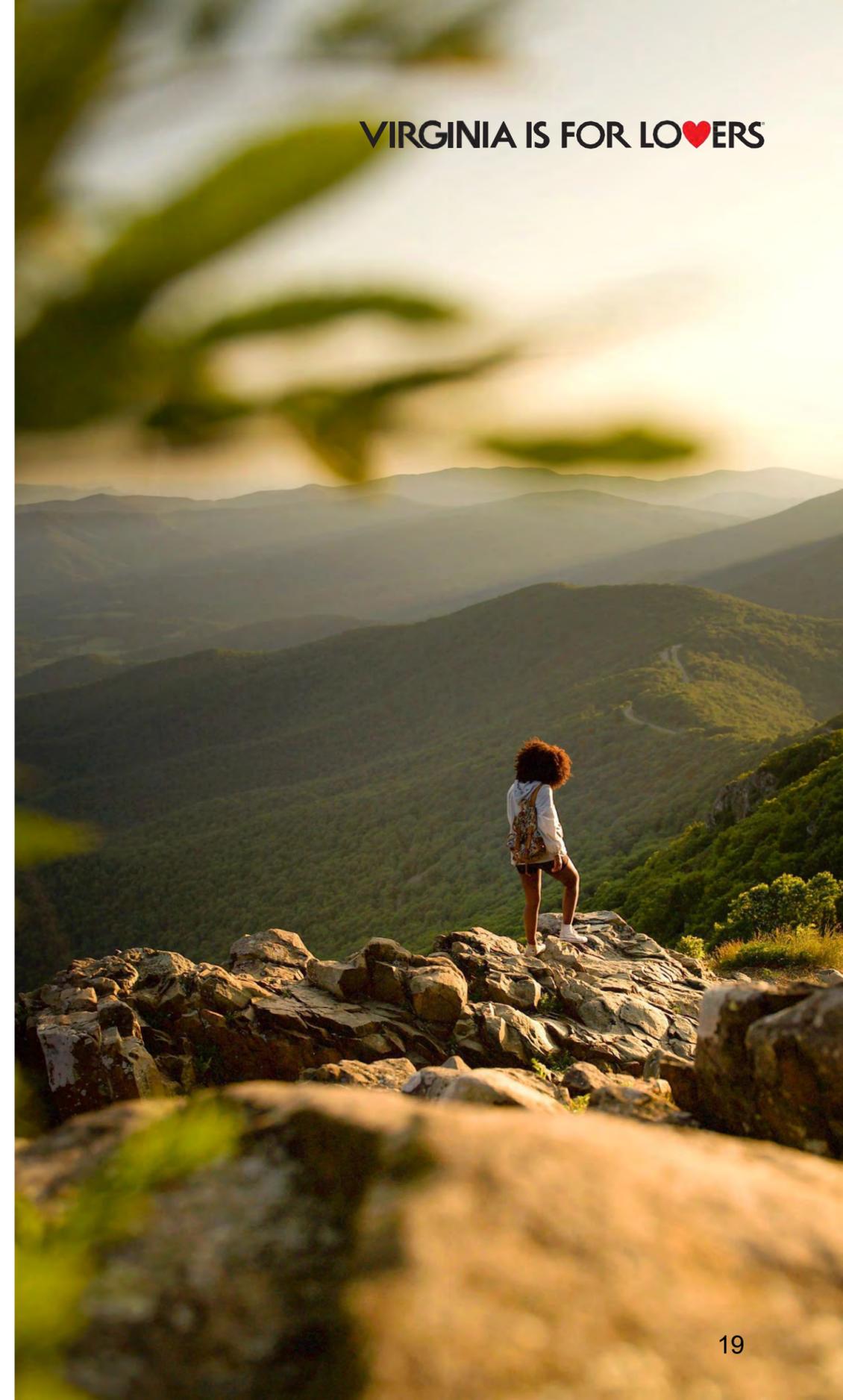
*TARGET
AUDIENCES*

TARGET AUDIENCES

Virginia's Core Visitor Segments

Virginia's strongest current visitors share consistent demographic and interest patterns, revealing where the state already has a solid market foundation. These segments represent the travelers most aligned with Virginia's existing lures and strengths.

- **Well-educated couples and families dominate visitation:** Most report having a college or post-college degree, reflecting an audience that values culture, learning, and well-rounded experiences.
- **Interest profiles align with Virginia's product mix:** Visitors express strong preferences for arts and culture, beaches, outdoor recreation, food, wine, and music, matching the state's diversified assets.
- **Multi-interest travelers provide the best extension potential:** Visitors seeking a combination of nature, culinary, entertainment, and history stay longer than single-interest travelers.
- **Regions with strong cultural and outdoor offerings perform best with these segments:** The mix of heritage, recreation, and scenic environments aligns with motivations of Virginia's dominant leisure travelers.

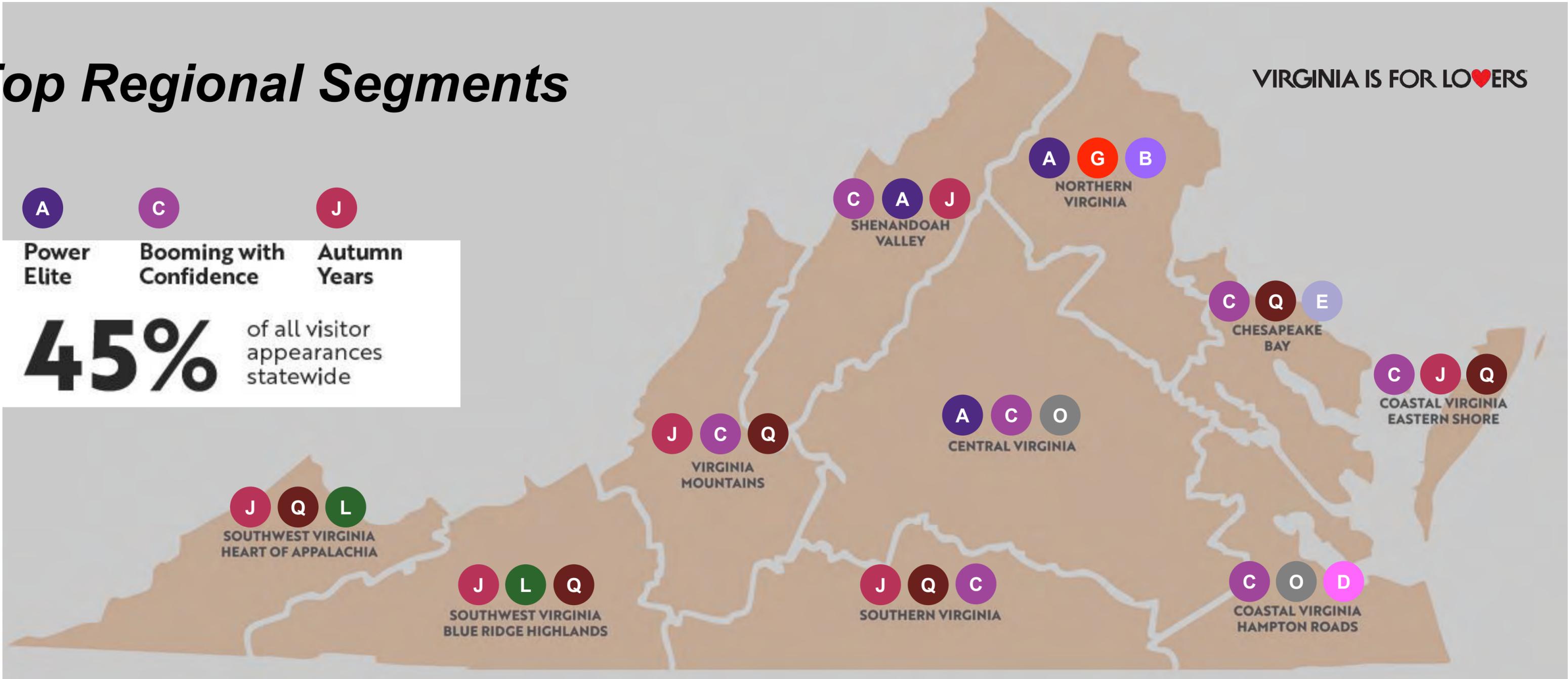


Top Regional Segments

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- A
Power Elite
- C
Booming with Confidence
- J
Autumn Years

45% of all visitor appearances statewide



A C
 Shenandoah Valley
 Central Virginia

J Q L
 SWVA Heart of Appalachia
 SWVA Blue Ridge Highlands

J Q C
 Virginia Mountains
 Southern Virginia
 Coastal Virginia Eastern Shore

C O D
 Coastal Virginia Hampton Roads

C Q E
 Chesapeake Bay

A G B
 Northern Virginia

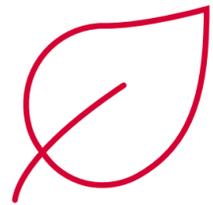
Scan for Segment Definitions



TARGET AUDIENCES

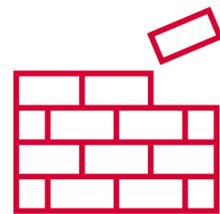
Priority Audiences to Target Now

These segments represent the highest-value opportunities for marketing, product development, and length-of-stay gains. Each aligns with emerging trends and Virginia's competitive strengths



LUXURY & UPSCALE TRAVELERS

This group is most willing to splurge on boutique lodging, gourmet dining, wellness retreats, vineyard experiences, and unique cultural activities—making them a prime driver of revenue and extended stays



ADVENTURE & OUTDOOR ENTHUSIASTS

Motivated by challenge, nature, and active itineraries, they respond strongly to recreation clusters, scenic drives, and connected trail—categories where Virginia has major expansion potential



NEXT-GEN TRAVELERS

They favor sustainability, authenticity, digital-first convenience, and experiential depth, making them key for emerging products like heritage immersion, eco-lodging, and cultural districts



BLENDED BUSINESS TRAVELERS

These visitors frequently add leisure days to work trips, creating opportunities for curated add-ons and regional hub-to-spoke itineraries

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***PRODUCT DEVELOPMENT
THEMES***

STATEWIDE PRODUCT DEVELOPMENT THEMES

Why Statewide Themes Matter

These development themes reflect the highest-impact opportunities that emerged consistently across all ten regions. They represent the product categories most capable of extending trips, increasing spending, and elevating Virginia's competitive position.

- **Experiences that create longer stays:** Visitors extend trips when destinations offer layered, multi-pillar experiences rather than single-attraction visits.
- **Consistency across regions:** Despite geographic differences, regions expressed similar needs—boutique lodging, stronger entertainment anchors, and expanded outdoor offerings.
- **Focus on high-return categories:** Themes prioritize segments with both high demand and high economic resilience, ensuring sustainable growth.
- **Foundation for investment and funding:** These themes establish the basis for statewide capital priorities and future incentive or financing mechanisms.

STATEWIDE DEVELOPMENT THEMES

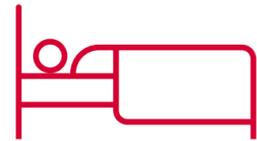
Strengthen Core Pillars of Visitor Appeal

The following development areas consistently scored as top opportunities to increase visitation and trip duration across the Commonwealth:



ADVENTURE & RECREATION EXPANSION

Enhance trail networks, river access, and outdoor hubs to attract active travelers and build multi-day itineraries around nature-based activities



BOUTIQUE & HISTORIC LODGING

Invest in adaptive reuse projects and design-forward lodging that reflect local identity and elevate perception of place



ENTERTAINMENT & NIGHTLIFE ANCHORS

Create or upgrade performing arts venues, live music spaces, and event programming to stimulate evening activity and increase repeat visitation



HERITAGE & HANDS-ON HISTORY

Develop immersive, interactive experiences that move beyond static exhibits and deepen engagement with Virginia's cultural story



CULINARY & BEVERAGE EXPERIENCES

Strengthen food districts, wine and spirits trails, and agritourism programming to capture high-spend travelers and extend stays through tasting itineraries

STATEWIDE DEVELOPMENT THEMES

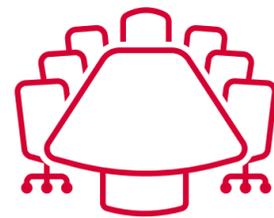
Emerging Opportunities and Business Travel Growth

Virginia can increase both leisure and weekday visitation by aligning new product investment with where demand is growing fastest:



BLENDED BUSINESS TRAVEL

Meeting and event markets are exceeding pre-pandemic levels, and business travelers increasingly add leisure days; regions with strong hospitality infrastructure can capitalize with curated add-on itineraries



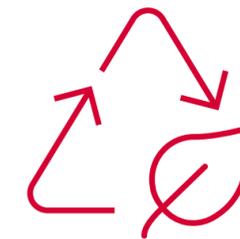
CONVENTION & MEETING ENHANCEMENTS

Upgrading conference and meeting facilities in select metros will support workforce mobility, attract larger events, and elevate Virginia's competitiveness in the Mid-Atlantic



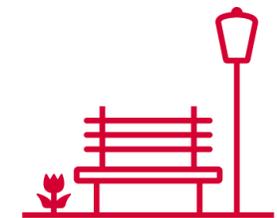
WELLNESS- ORIENTED PRODUCTS

Demand for spas, wellness retreats, outdoor wellness, and restorative nature experiences continues to climb, presenting an opportunity for mountain, water, and vineyard destinations



SUSTAINABILITY AS A MARKET DRIVER

Eco-conscious visitors reward destinations that demonstrate environmental stewardship; sustainable lodging, green trails, and low-impact attractions are in rising demand



INTEGRATED VISITOR CORRIDORS

Linking outdoor recreation with culinary districts, lodging clusters, and cultural hubs will create "stay-extending corridors" where visitors naturally extend trips across multiple pillars

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NEXT STEPS

STATEWIDE RECOMMENDATIONS

Priority Recommendations

The recommendations reflect what emerged most consistently across data analysis, stakeholder input, and competitive benchmarking. They outline the structural and investment tools Virginia needs to elevate its tourism product and extend visitor stays.

- **Establish a Tourism Product Investment Fund:** A statewide mechanism modeled on performance-based incentives to stimulate private development of lodging, entertainment, wellness, and recreation assets.
- **Strengthen outdoor recreation investment:** A dedicated recreation fund would support trail systems, river access, and infrastructure central to Virginia's fastest-growing visitor segments.
- **Evaluate regional boundary adjustments:** Several stakeholders noted that certain regional boundaries do not reflect traveler behavior or product clusters; alignment could enhance marketing and development efficiency.
- **Extend Steering Committees beyond plan adoption:** Regional committees provided essential insight during planning and should continue as implementation partners that guide priorities and monitor

STATEWIDE RECOMMENDATIONS

Organizational and Structural Enablers

Implementing the Plan requires alignment between VTC, regional DMOs, and state-level partners. Structural clarity ensures resources and staff capacity support the Commonwealth's development goals

- **Strengthen interagency coordination:** Tourism development intersects with transportation, natural resources, economic development, and workforce agencies; shared priorities are essential for successful projects.
- **Sustainability and Inclusive integration:** Travelers increasingly value destinations that reflect responsible stewardship and inclusive experiences; these principles should guide project evaluation and marketing narratives.
- **Explore additional financing tools:** Some comments referenced bonding authority and enhanced financing capabilities for tourism development.
- **Consider VTC's role to further placemaking:** Stakeholders emphasized the need for VTC to serve as more than promoter, helping regions advance products that match visitor demand and statewide priorities.
- **Develop a unified performance dashboard:** Regions should track visitation, length of stay, spending, and project progress to evaluate Plan impact over time.

IMPLEMENTATION ROADMAP & NEXT STEPS

A clear, phased implementation strategy ensures the Plan moves from insight to action and allows partners across the Commonwealth to coordinate investments effectively.

PHASE 1

ONLINE STAKEHOLDER REVIEWS

First quarter of 2026
VTC will conduct webinars and plan virtual public meetings to review the plan with stakeholders across all regions.

PHASE 2

PROGRAM DEVELOPMENT

Through the second quarter of 2026, VTC will develop an implementation program similar to Drive 2.0 to engage the regions.

PHASE 3

PROGRAM LAUNCH

Initial program to launch across the Commonwealth in June 2026.

PHASE 4

LONGER-TERM INITIATIVES

The Plan identifies additional opportunities for implementation at the state level. These initiatives will be addressed beyond the first two quarters of 2026.

VISION FOR THE COMMONWEALTH:

Strengthen Virginia's competitive identity, elevate experience quality statewide, and ensure tourism remains a powerful contributor to economic development and resident quality of life.

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THANK YOU!

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