

**How natural assets and outdoor recreation is driving
tourism economic development in Virginia**

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Presentation Snapshot:

- Economic Impact of Outdoor Recreation
- DRIVE Tourism – State Tourism Plan
- Freshwater-Based Efforts Around Virginia
- Ways VTC can help
- Top-of-Mind Thoughts



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Impact of Tourism in Virginia - 2013

- Generated \$21.5 billion in visitor spending
- Supported 213,000 jobs and almost \$4.9 billion in payroll
- Provided more than \$1.42 billion in state and local taxes for Virginia's coffers
- Generated domestic traveler spending \$59 million each day in the Commonwealth



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Impact of Tourism in Virginia - 2013

- The travel industry is the fifth largest private employer in Virginia
- Virginia ranks 9th in domestic traveler spending among 50 states and Washington D.C.
- Domestic travel in Virginia directly generated more than \$2.8 billion in tax revenue for federal, state, and local governments in 2013.

The Power of Travel

How Travel Dollars Support America

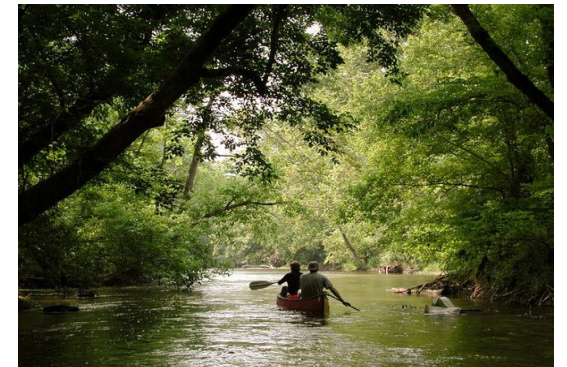


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Impact of Outdoor Recreation in Virginia - 2012

- \$13.6 billion in consumer spending
- 138,000 direct Virginia jobs
- \$3.9 billion in wages and salaries
- \$923 million in state and local tax revenue
- Almost half of Virginia residents participate in outdoor recreation each year

outdoorindustry.org



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Virginia Outdoor Recreation Visitor Profile

- 18% of all household trips to Virginia include some form of outdoor recreation
- Those that include outdoor recreation in their trip visit Virginia more frequently than the average visitor

Virginia's travelers that engage in outdoor recreation:

- Spend more money than the average visitor (\$609 versus \$401 per trip)
- Compared to the average traveler 3% more of outdoor recreation travelers plan to visit Virginia in the next 2 years.



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An estimated 20% of all household trips to the Shenandoah Valley include some form of outdoor recreation



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Virginia's Tourism Development Plan



<http://www.vatc.org/STP/>

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State Tourism Development Plan

- Nature and Outdoor Recreation should be a primary product focus for the Shenandoah Valley and other regions
- Key Recommendations include:
 - Develop, maintain, and expand outdoor trails and water trails
 - Continue to develop and enhance outdoor experiences at parks, forests, recreation areas, nature areas, and preserves
 - Leverage Virginia’s waterfront areas
 - Seek and maintain designations for National Scenic Byways and the Virginia Scenic Byways and Scenic Drives
 - Develop and enhance accommodations related to outdoor experiences



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DRIVE Tourism

Other Shenandoah Valley specific recommendations include:

- Seek designations for Appalachian Trail Communities
- Leverage the Blue Ridge Parkway to connect outdoor experiences
- Explore the development or designation of adventure parks. Balance adventure elements with relaxing or “soft” recreation experiences.
- Continue to leverage the prominence of the Shenandoah National Park



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DRIVE Tourism

Other Shenandoah Valley specific recommendations include:

- Continue to leverage the Blue Ridge and Alleghany mountains for outdoor experiences
- Explore the opportunities to further leverage and promote the natural springs in the Alleghany Highlands area
- Continue to leverage and promote the Upper James River Trail
- Explore water trail development for Jackson, Maury, and Shenandoah Rivers



DRIVE Tourism

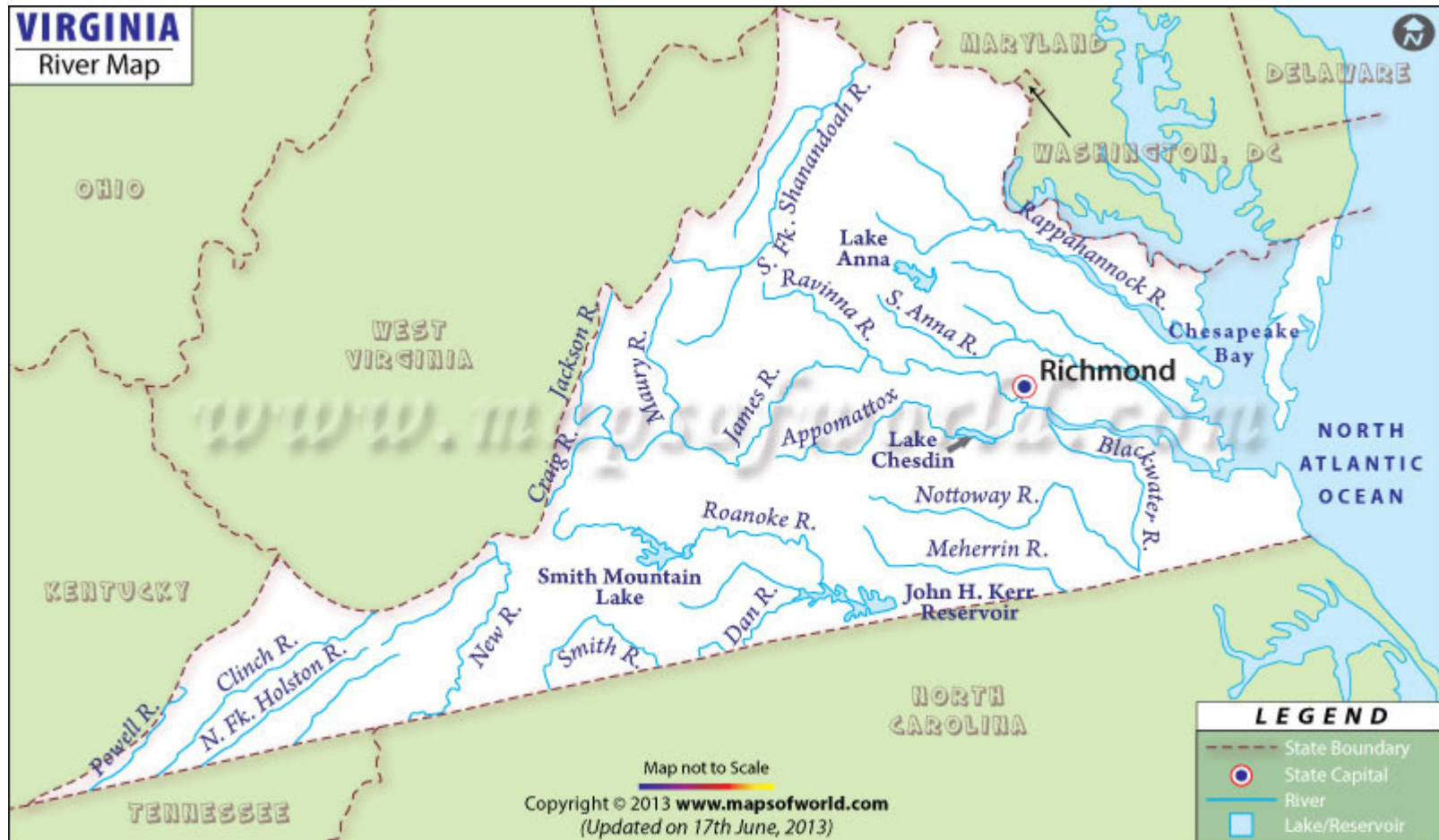
Other Shenandoah Valley specific recommendations include:

- Ensure maintenance of the Blue Ridge Parkway and Skyline Drive Designations
- Evaluate the need for additional cabins, camping, and lodges in strategic locations
- Explore development of additional upscale-oriented lodging for the outdoors, such as mountain lodges or resorts



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Efforts Around the State



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Dan River Basin Association



...By promoting a bi-state network of rivers, greenways, and trails, DRBA hopes to improve the region's quality of life, making the area a better place in which to live, visit, and do business.



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New River



- Focus on the river as an economic development strategy steadily increasing
- Guide services, lodging, destination restaurants, etc. being established
- Planning initiative underway



Southern Virginia Wild Blueway

- Consists of three rivers (the Dan, the Staunton, & the Banister) and two lakes (Kerr Lake & Lake Gaston) spanning Halifax and Mecklenburg counties



Southern Virginia Wild Blueway

- Support for public access ramps:
 - Tobacco Commission funding
 - Dominion Power
 - Army Corps of Engineers
 - Upper Reach
 - Mecklenburg County
- Funding for marketing efforts and branding:
 - RDCI grant through VCC
 - MLP grant through VTC
 - DCR marketing funds



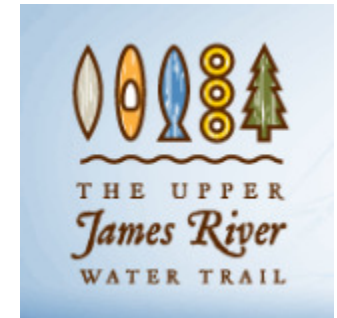
Alleghany Highlands Blueway



- The Alleghany Highlands Blueway is comprised of two lakes and two scenic rivers that offer great paddling, fishing and boating opportunities.
 - Jackson River
 - Cowpasture River
 - Douthat State Park
 - Lake Moomaw



Upper James River Water Trail

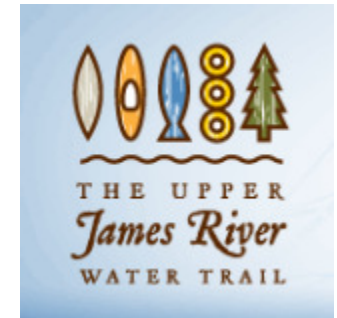


Intended to create a water-based trail system that will link the different assets found on the river to form the Upper James River Water Trail.

Goals:

- Increase public access to the River
- Develop an identity for the Upper James River Water Trail
- Develop a sustainable tourism-based economy

Upper James River Water Trail



Trail Locality River Related Business Since 2010

Business Type	2010	2014
Retail Outfitters	2	2
B & Bs	2	5
Cabins / Vacation Homes	3	9
Fishing Guide/Service	1	5
Campgrounds	2	4
Rental Outfitters (in Botetourt)	3 (1)	3 (1)

Small Business (one)

Local Paddle sports Rental Business Located on the Water Trail

Company Growth

Year	Number Customers	Number Employees
2009	4,500	5
Spring 2010	Launched Upper James River Water Trail Initiative	Website & Marketing Program
2010	5,400	6
2011	6,600	9
2012	9,800	11
2013	9,500	14
2014	12,000	15

6

Jackson River Scenic Trail



- With a trailhead located just minutes from downtown Covington, the Jackson River Scenic Trail is a 14 mile trail built on an old railroad bed that runs mostly parallel to the Jackson River.



Clinch River Valley Initiative



Located in far southwest Virginia, the Clinch River is one of the most diverse river systems in North America.

Clinch River Valley Initiative

Goals/Working Groups Include:

- Public Access, Trails, and Campgrounds
- Downtown Revitalization & Marketing
- Water Quality
- Education
- State Park Development



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Clinch River Valley Initiative

Economic impact of proposed Clinch River State Park:

- Clinch River State Park would attract an estimated 104,700 visitors in it's third year of existence
- In the first and second years, park visitation is expected to be around 74,300 and 94,900
- For the third through fifth years, the average number of visitors is expected to be 106,400

<http://clinchriverva.files.wordpress.com/2011/11/clinch-river-economic-impact-study-2013.pdf>



Fish Virginia First



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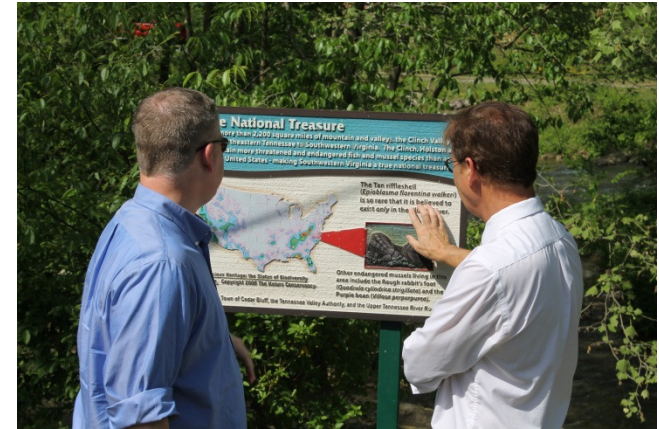
How can
Virginia Tourism Corporation
help?

- Advertising
- Customer Service & Industry Relations
- Electronic Marketing
- Film Office
- Marketing & Promotion
- Public Relations
- Research
- Tourism Development
- Funding Programs
- Others



Virginia Tourism Corp. Services

- Fish Virginia First
- Clinch River Valley Initiative
- New River Trail
- Spearhead Trails
- Tobacco Heritage Trail
- Southern Virginia Wild Blueway
- Midland Trail
- Virginia Coal Heritage Trail
-



Development & Partnership Marketing

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- Attend an orientation
- Visit www.vatc.org & www.virginia.org
- Sign up for the e-newsletter
- Establish relationships with all VTC divisions – tap into our services (i.e. marketing, advertising, research, etc.)

Learn More About VTC Services

Top-of-Mind Development Thoughts

- Having the right facilitator engaging and involving all stakeholders (including landowners) is key.
- Securing landowner easements, purchasing property, etc. for public access is a tedious process that should be respectful of all stakeholders, especially **all** landowners. Good mapping required!
- Purchasing property from willing landowners may be the best overall approach in some situations, even if it takes years.
- Pilot project approach, working first on low hanging fruit opportunities, may be good starting point.
- Never underestimated the power of education/advocacy at the forefront and ongoing.

Some Trends to Watch



Marketing

- Soft-core outdoor recreation enthusiasts are a key market
- Shorter stays/visits are the norm
- Connecting with nature is popular, is touted for health, is an authentic experience, etc.
- Social media helps level the playing field
- People want “social trophies”, and outdoor rec trophies are really cool!

Development

- Overlap with economic development and quality of life is becoming more and more significant
- Connectivity to downtowns is an important component

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