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DRIVE 2.0

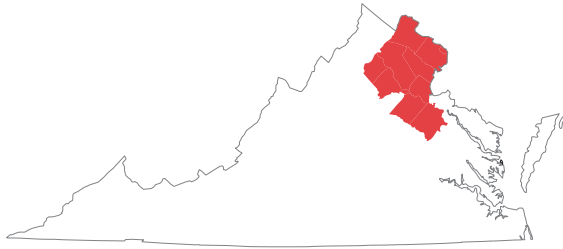
2020-2025 STRATEGIC TOURISM PLAN
REGIONAL PLAN: **NORTHERN VIRGINIA**

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NORTHERN VIRGINIA INTRODUCTION

The Northern Virginia regional plan builds upon the foundational insights established in the 2020-2025 statewide tourism plan, as well as the original 2013 DRIVE Northern 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 Northern Virginia by increasing tourism products, expenditures, employment and local and state tax receipts.

**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 Northern Virginia region consists of the municipalities of Alexandria, Leesburg, Manassas, Fredericksburg, Fairfax, Herndon, Culpeper, Manassas Park, Vienna, Falls Church, Purcellville, Warrenton, Lorton, Marshall, Spotsylvania, Springfield, Woodbridge, Occoquan, Centreville, Chantilly, Middleburg, Reston, McLean, Clifton, Triangle, Washington, and Dulles as well as the counties of Fairfax, Prince William, Loudoun, Arlington, Stafford, Spotsylvania, Fauquier, Culpeper, Caroline, and Rappahannock.

QUICK FACTS

- Population: 3 million (largest of the 10 VA regions)
- Largest town/city: Alexandria (160,530)
- Interstates: I-95, I-66
- US-1, US-28, US-29, VA-7, VA-123
- Border States: WV, MD, D.C.
- Commercial airports: Dulles International Airport, Reagan National Airport
- Proximity to urban hubs: D.C. metro, Baltimore, Richmond, and Hampton Roads

TOURISM IMPACT

The Northern Virginia region accounted for \$11.2 billion in travel and tourism expenditures in 2018 (approximately 44% of the state's overall travel and tourism expenditures). Year over year, the region experienced a 4.3% increase in expenditures (in line with the overall Virginia state expenditure growth of 4.4%).

- **Total expenditures:** \$11.2 billion
- **Employment:** 100,861
- **Payroll:** \$3.1 billion
- **Local tax receipts:** \$251 million
- **State tax receipts:** \$455 million

From a tourism industry perspective, in addition to tourism marketing organizations on a local basis, Alexandria, Arlington, Fairfax, Loudoun, and Prince William formed NVTP which celebrates "Virginia's Cultural Region" highlighting the mix of history, culture, dining, and shopping that can be found in the region. Rappahannock, Culpeper and Fauquier partner with Central Virginia communities (Madison and Orange) on regional projects —the Rappahannock-Rapidan Regional Commission.



LURES

Northern Virginia's history and heritage assets continue to be a strength for the region. Its proximity to D.C., to mass transit, and to major airports give the region a unique edge and access to "spillover" visitation from the nation's capital. In addition, food and beverage, arts, music and culture remain strong offerings as well.

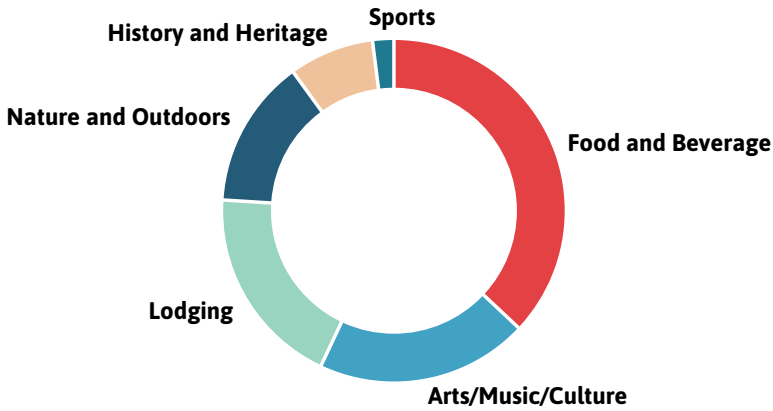
When asked to name a the primary lure for the region, industry leaders identify the following:



History and heritage opportunities remain key strengths for the region, and visitors can attend well-known attractions including George Washington's Mount Vernon, Arlington National Cemetery, Iwo Jima Memorial, Fredericksburg & Spotsylvania National Military Park, and Manassas National Battlefield Park to name a few.

Northern Virginia is well positioned adjacent to D.C., with Interstate 66 connecting Washington D.C. to the Shenandoah Valley region and Interstate 95 connecting Washington D.C. to North Carolina. The region is also served by Dulles International and Reagan National airports. The region also benefits from mass transit including the DC Metrorail, which is continuing to expand the Silver Line to reach Dulles airport. Capital Bike Share and water taxis also provide opportunities to easily connect northern localities with D.C.

Inventory of Regional Assets
Source: VTC Research

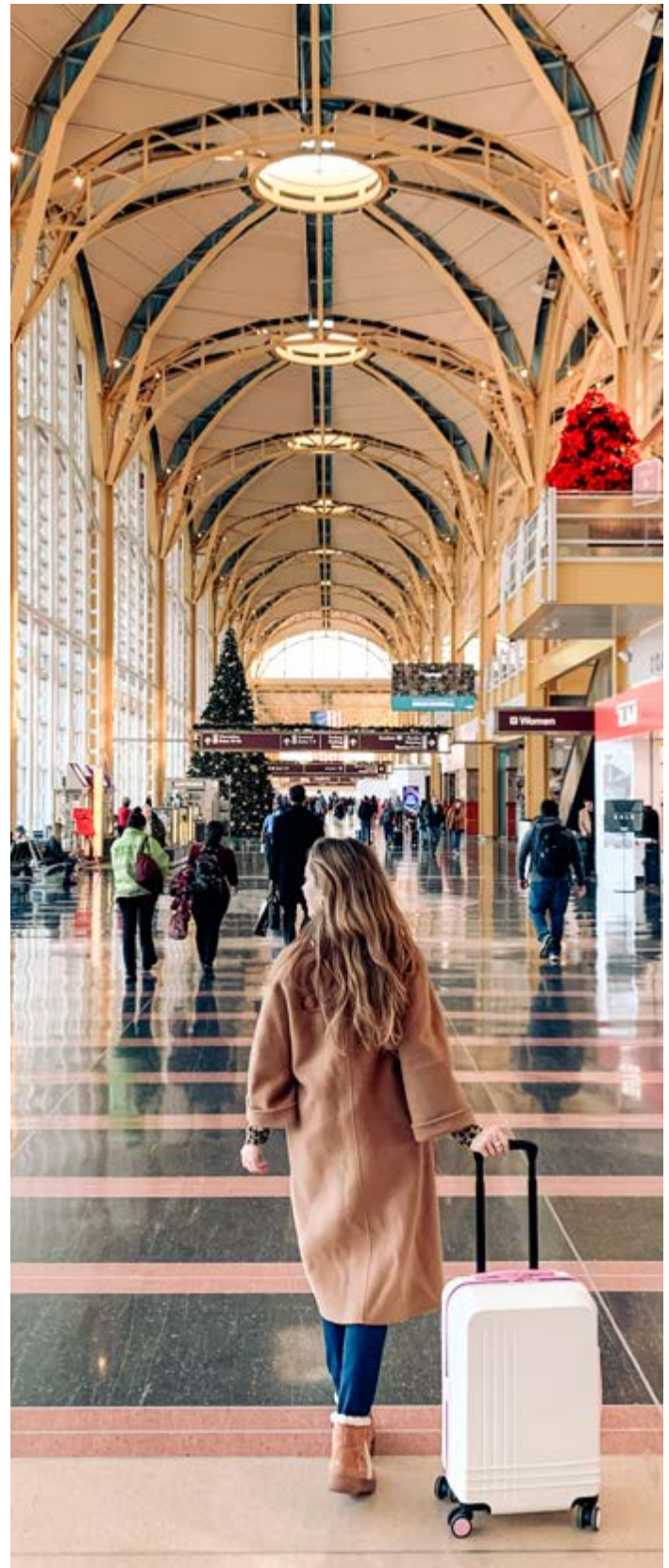


LURES (cont'd)

Many of Virginia’s great urban villages, cities, and towns can be found in Northern Virginia, and Culpeper, Manassas, Fredericksburg, and Warrenton are all designated main streets by the National Main Street Program. In addition, Loudoun County has distinguished itself through wine production and equestrian assets. With over 90 wineries and seven regional wine trails, Northern Virginia is the largest wine producing region in the state and a major contributor to Virginia’s national and international recognition within the wine industry. Included are farm-to-table restaurants and events such as restaurant week, along with food festivals and food tours, the region is known for its food and culinary assets.

Northern Virginia cannot be beat when it comes to its shopping opportunities. With high end shopping malls in Tysons Corner, unique boutiques along quaint main streets like Old Town Alexandria, outlet malls in Leesburg and Potomac Mills in Woodbridge, and endless antiquing all along the way, there’s something for everyone.

With this proximity to D.C., the region benefits from a strong corporate base and industry concentration in federal activity. Along with a healthy hotel supply and robust air access, the region is a strong area for meetings and conferences. Facilities include the Dulles Expo & Conference Center, The National Conference Center, Airlie Center, Fredericksburg Expo & Conference Center, and large hotels such as the Hyatt Regency Crystal City, and the Hilton Alexandria Mark Center. The luxurious Salamander Resort & Spa in Middleburg adds a distinctive property for meeting space, and other notable and unique lodging opportunities can be found throughout the region as well, including Goodstone Inn and The Inn at Little Washington.



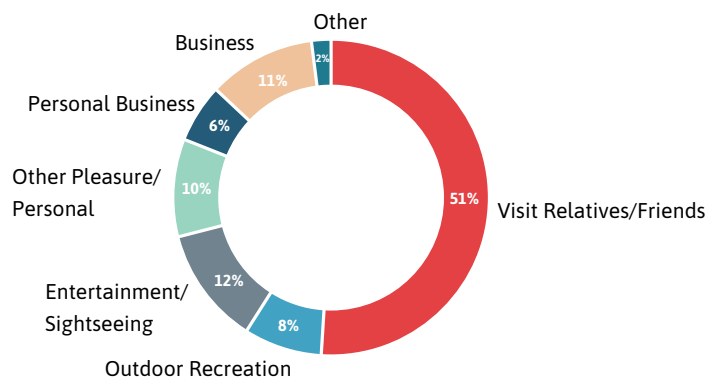
LURES (cont'd)

Through music and performing arts venues like Wolf Trap National Park for the Performing Arts, Jiffy Lube Live, and the Signature Theater in Arlington, Northern Virginia presents visitors with a number of opportunities to experience musical performances ranging from symphony orchestras to alternative music and the performing arts.

The visual arts are also widely celebrated in the region. With venues like the Torpedo Factory Art Center, Artisphere, the Workhouse Arts Center, and Artisan Trails provide visitors opportunities to experience the material arts, including fine arts, contemporary visual arts, and others in unique ways.

Opportunities to hike, bike, horseback ride, observe wildlife, hunt, fish, kayak, camp, and canoe can be found throughout the region as well, as Northern Virginia contains such assets as the Captain John Smith Trail, Virginia Birding and Wildlife Trail, four state parks, the Potomac River, Great Falls National Park, and others. The region also boasts a strong equine industry, with opportunities to experience steeplechase races, such as the world-famous International Gold Cup, polo matches, horse shows, scenic riding trails, and equine museums and horse farms.

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	36%
Shopping	29%
Historic sites/Churches	22%
Museums	20%
Fine dining	19%
Visiting Friends	18%
Rural Sightseeing	15%
National parks/Monuments	13%
Urban Sightseeing	13%
State parks/Monuments	11%

HIGHLIGHTS OF REGIONAL LURES

- Colonial, Civil War, Military History
- **Virginia Main Streets:** Culpeper, Manassas, Warrenton, and Fredericksburg
- **Notable Towns & Cities:** Alexandria, Arlington, Fredericksburg, Fairfax County, Leesburg, Loudoun County, Spotsylvania, Fauquier, Middleburg
- Interstate connectivity and airports
- Hotel supply
- **Conference centers:** Dulles Expo & Conference Center, Fredericksburg Expo & Conference Center, The National Conference Center, Airlie Center
- Largest concentration of wineries in the state (over 90)
- **State parks:** Mason Neck State Park, Leesylvania State Park, Widewater State Park, and Lake Anna State Park
- Industry base, including corporate, federal, equestrian
- Relatively affluent economic base

CHANGES OVER THE PAST FIVE YEARS

The past five years have witnessed additional development and focus on the Tween Rivers Trail, which has helped to collectively market and promote the region's agritourism sites and activities, resulting in a well-coordinated tourism experience as well as more brand awareness for the region as an agritourism destination. Leveraging their proximity to D.C. and the marketing of the Tween Rivers Trail, Rappahannock, Culpeper, and Fauquier counties have experienced growth in the culinary sector, specifically through breweries, wineries, cideries, and distilleries.

Fairfax launched the Fairfax County Breweries Field Guide in 2018 that showcases all the craft breweries in Fairfax. Beer lovers can grab a paper guide or a digital mobile guide through the Visit Fairfax app.

In 2018, Farm Brew Live opened in Manassas. An eight-acre campus that features craft beer, craft food, and live, local music is part of Innovation Park in Prince William County on the site of the historic Thomasson Barn. The site includes 2 Silos Brewing Co and tasting room, The YARD outdoor live music venue, The Pit barbecue and beer garden and La Gringa food truck. Most recently, the campus added The Black Sheep whiskey + wine + noshery and terrace in a two-story historic dairy barn. The bar will also feature a dedicated arts and entertainment space.

Loudoun County is seeing a rise in joint wineries and breweries. Thanks to new legislation, the two craft beverages can unite, and local winery owners are venturing into the craft beer business. Notaviva Craft fermentations offers mixed wine and beer flights and Hillsborough Winery & Brewery brings winemaking and craft beer under one roof.

In spring of 2018, the CEB Tower Observation Deck opened in Arlington's Rosslyn Business Improvement District. The 31-story building offers an outdoor cantilevered terrace that provides a spectacular view of the DC skyline. The 15,000-square-foot space also features exhibit space, restaurant and bar.

The King Street Waterfront Park, a new public plaza hosting popup markets, live performances, and an ice rink in the winter, opened in the fall of 2018 in Alexandria. In June of 2019, the tall ship Providence arrived in Alexandria and will stay as a permanent attraction.

Towns throughout Northern Virginia have made strides to up their appeal as well. Warrenton and Culpeper, for example, have made efforts to align their main streets to meet the standards of Virginia Main Streets. Fauquier and Culpeper have also been investing in public art and have increased public events surrounding the arts and music scene. And Warrenton is home to Gloria's, which is one of Virginia's premier listening rooms located inside the Center for the Arts, featuring local, regional, national, and international talent.

In early 2019, the General Assembly and Loudoun County committed to supporting a public-private partnership with the Children's Science Center and Science Museum of Virginia that will provide a portion of funding for over \$70 million for a regional science center to be located in Kincora.



CHANGES OVER THE PAST FIVE YEARS (cont'd)

Numerous projects have been underway in the history and heritage category. George Washington's Mount Vernon launched a new first-person interactive experience called "Be Washington: It's Your Turn to Lead" and re-opened its Revolutionary War Theater marking the completion of a year-long \$2.2 million renovation to the 4-D theater and an overhaul of the feature film. George Washington's Ferry Farm in Fredericksburg created the house where George Washington spent his youth.

Close by, Arlington House: The Robert E. Lee Memorial will open after fall 2020 once the multi-million dollar rehabilitation of the site is completed. Located at the top of Arlington National Cemetery, Arlington House has been closed since mid-2018 for a \$14 million renovation project. Visitors will see Arlington House as it was in 1860, with rooms restored to their historical appearance. Additionally, the quarters for the enslaved people of Arlington House will be restored to better represent a fuller picture of Arlington House and tell the stories of its inhabitants. People who cannot visit in person can enjoy a robust experience through virtual tours, complete with detailed displays of the room and objects that belonged to George Washington and the Lee family.

Also coming in 2020, visitors can learn more about Alexandria's Black heritage through interpretation along the Duke Street corridor, a series of film screenings and lectures, expanded programming at Freedom House Museum and special tours such as the Black Cemetery Tour.

The National Museum of the United States Army opened to the public in November 2020. The 185,000-square-foot museum will be located in southern Fairfax County, adjacent to Fort Belvoir, and will be the first and only museum to tell the 244-history of the U.S. Army in its entirety. The state-of-the-art museum will be a technological marvel incorporating the latest advances in museum exhibits while providing unparalleled educational opportunities.

Another new attraction in Fairfax in 2020 is the Turning Point Suffragist Memorial at Occoquan Regional Park. The 1.6-acre national memorial will be the first place in America to tell the complete story of the suffrage movement.

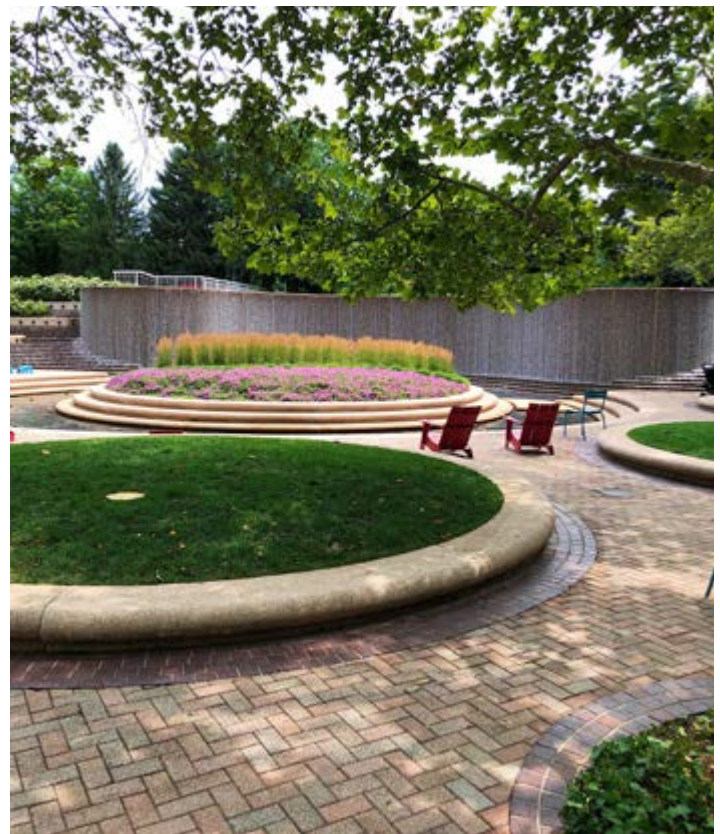
When it comes to outdoor recreation, Rappahannock has leveraged its proximity to the Shenandoah National Park by offering visitors outdoor experiences, and Riverside Preserve was opened to the public in the spring of 2019. The preserve covers 196 acres and provides the first public access to the Rappahannock River in Fauquier County. The Fauquier Trails Coalition serves as a conduit for the semi-regional outdoor trail connector.

Neabasco Regional Park, a new park in Prince William County, is comprised of Julie J. Metz Wetlands Park, Rippon Lodge Historic Property, Kings Highway, Neabasco Creek Boardwalk, Potomac Heritage National Scenic Trail and Rippon Landing Neighborhood Park. The boardwalk connects Rippon Landing Community Park to

the area's wetlands and has a two-story observation deck where people can walk across the wetlands and taken in the natural habitat of Prince William County. The boardwalk is part of Prince William County's plan to complete its section of the Potomac Heritage National Scenic Trail, stretching from Pennsylvania to the Chesapeake Bay.

Fairfax County and Washington, DC will soon be even more accessible than ever as Phase II of the Silver Line Metrorail extension is set to be completed in 2021. This extension will finally connect Washington Dulles International Airport and several new stations in Herndon and Reston with the existing Washington Metrorail service, which feeds Virginia, Maryland, and the District of Columbia. In 2019 the Potomac Riverboat Company launched, a high-speed water taxi service from Alexandria marina to The Wharf in D.C. Capital Bikeshare came to Fairfax in fall 2016 with stations in Reston and Tysons. There are now 30 stations in that area and more stations are expected in the upcoming years.

And, perhaps, the biggest change in the past five years is the announcement in the fall of 2018 that Amazon will locate its new headquarters in Arlington. Amazon will invest approximately \$2.5 billion to establish a major new headquarters that will create more than 25,000 high-paying jobs over 12 years. The headquarters will be housed in a collection of new and renovated buildings located in National Landing, which includes portions of Pentagon City and Crystal City in Arlington and Potomac Yard in the Alexandria.



FUTURE PRODUCT OPPORTUNITIES

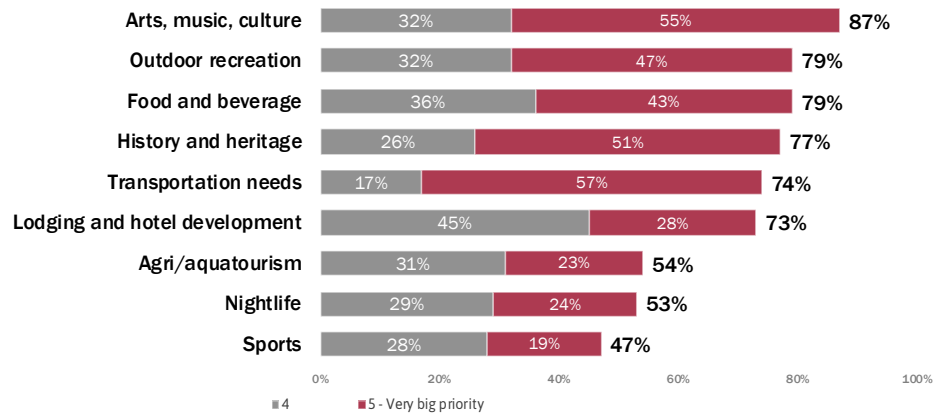
Northern Virginia is the only region in the state not to have ranked outdoor recreation as its number one priority in the DRIVE 2.0 strategic plan development survey. Instead, Northern Virginia travel and tourism industry leaders identify arts, music, and culture as the top priority need — specifically in terms of better understanding how to develop and promote these offerings and experiences.

In the inventory referenced earlier, the region offers well over 500 festivals and events, arts and other cultural venues, and performing arts and music venues. With an already stable and appealing array of opportunities to experience arts, music, and culture, the region should continue to lean into this strength and work to better promote these offerings and tie these assets together for a richer experience. Similarly, leaders should continue to ask: How can this momentum carry over into communities where these opportunities may be in shorter supply?

With big festival anniversary this year, it could be a great opportunity for the region to come together to celebrate the exciting music and festival experiences across the region. The Columbia Pike Blues Festival will celebrate its 25th anniversary in June 2020 and the Rosslyn Jazz Fest will celebrate its 30th anniversary in September 2020.

Unlike localities in other parts of Virginia, the Northern Virginia region is going to continue to experience population growth, and with the influx that will likely come with the arrival of Amazon, communities throughout the region will be prime destinations for growth. Ensuring that communities are focusing on placemaking — making their communities vibrant places to live, work, play, and visit — will be essential. These efforts should include increasing

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



food and beverage options, arts and music, outdoor recreation, bikability, and walkability.

The region offers six convention and conference spaces, which, given the relatively dense area and active industries in the area, is relatively few. Meanwhile, the Hampton Roads region offers 10 convention and conference spaces. And, while the region offers more hotels and meeting spaces (22) than other regions, there is still opportunity for the Northern Virginia region to increase its offering of convention and meeting space, especially when considering the expected continued growth of the region. To this end, numerous hotels across the region are undergoing renovations to their meeting spaces, all set to be completed in 2020. This includes the Hyatt Regency Dulles, Tysons Corner Marriott, The Sheraton Reston, and the Westin Tysons Corner. The Lansdowne Resort and Spa in Loudoun is renovating 55,000-square-feet of meeting space into a luxurious and state-of-the-art location for team building, conference, or group meeting space.

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



FUTURE PRODUCT OPPORTUNITIES (cont'd)

In late 2019, Visit Alexandria announced The Leadership Collection at Alexandria, a new meetings offering. Alexandria is home to three nationally recognized leadership and team building institutes. With groundbreaking content, high-level facilitators, and one-of-a-kind inspiring venues, the George Washington Leadership Institute at Mount Vernon, McChrystal Group, and Building Momentum are renowned for their ability to ignite breakthrough thinking, innovation, and passion. The initiative offers affordable access where organizations can hold a leadership development retreat for mid-size meetings up to 150 people. The Collection offers customizable programs ranging from two hours to a full week and a one-stop concierge service to make it easy for organizations.

While the region offers some of the most robust lodging product mix, more is needed to meet the growing visitor and meetings demand. New and renovated properties include The Hyatt Centric Old Town Alexandria on King Street will include 124 guest rooms and a French, southern inspired restaurant. The George Mason Hotel, also in Alexandria, is undergoing restoration. The historic hotel, built in 1926, served as an office building for decades. The new hotel will include 141 hotel rooms, two restaurants, rooftop and outdoor dining. The George, a historic property in Old Town Alexandria, once owned by General George Washington, is a new B&B. The 6,000-square-foot townhouse features eight suites and sleeps 20 guests. Each stay includes four complimentary tickets to Mount Vernon.

Sports tourism has surfaced as another priority area for many stakeholders in Northern Virginia, and 84% cited indoor and outdoor sports facilities as a priority. The region offers 13 sports facilities (fewer than Central Virginia), six sports teams and only one major sports facility (fewer than Central Virginia and Hampton Roads). In this vein, Warrenton has a large indoor/outdoor facility that could be leveraged more to attract visitors through competitive youth events. In Springfield in Fairfax County, is the St. James, a 450,000-square-foot facility offering a wide-range of sports, wellness, and active-entertainment options – including a FIFA regulation-size soccer field, two NHL regulation-size rinks, eight squash courts, seven golf simulators, six batting cages, a 50-meter Olympic regulation-length pool, indoor water park, gymnastics center, climbing and bouldering spaces, e-sports gaming theater, four full-length basketball courts that are convertible to nine volleyball courts, a 50,000-square-foot health club, a sports medicine center, and a restaurant. In Loudoun County, the Ion International Training Center, a year-round, twin sheet indoor ice rink and arena that serves recreational and professional figure skaters, ice dancers, pair skaters, synchronized skaters, and hockey players.

AREAS OF FOCUS

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

- **Primary:**
History & Heritage, Town/City Centers, Culinary (Dining, Libations), Meetings (Meetings & Conferences), Arts & Music, Sports
- **Secondary:**
Nature & Outdoor Recreation, Events, Culinary (Agritourism)

There is also opportunity for Northern Virginia to leverage professional sports practice venues. The NFL Washington Football Team headquarters and training facility is located in Ashburn in Loudoun County. The 121,000-square-foot indoor training facility is a great destination for flag football events, complimented by the newly remodeled lobby, auditorium, and cafeteria with provide ample space for VIP events and meetings. MedStar Capitals Iceplex is a state-of-the-art facility located atop the Ballston Common Mall Parking Garage in Ballston in Arlington. Home of the NHL Washington Capitals and its practice site, the Iceplex is also open to the public and free of charge. In addition to the 20,000-square-foot training center, the Iceplex features two indoor NHL-sized ice rinks, office space, locker rooms, a full-service ProShop, a Capitals Team Store, a snack bar, and space for special events.

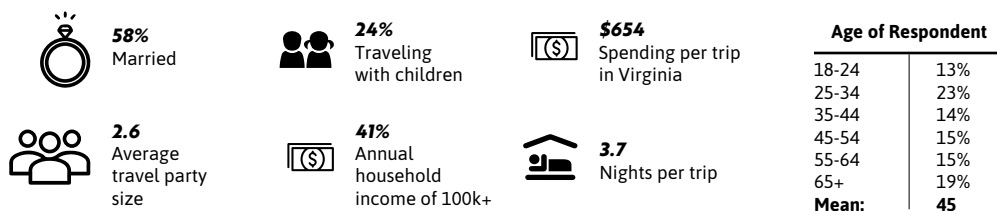
Continued focus on transit and alternative transit options is encouraged. Options like water taxis and bikeshare are great. These are only in Alexandria and Fairfax so the region should think through ways to expand the connectivity of these efforts to provide additional transit options into other counties further south and west in the region. Moreover, as the Metrorail Silver Line expands to Dulles Airport, additional transit options from the stops into communities along the way creates a big opportunity to increase connectivity.

Along with its 27 national parks, refuges and forests, 23 equestrian centers, 22 lakes, 13 rivers and streams, 52 miles of state park trails, and 32 outfitters, the region is flush with outdoor recreation offerings. With this many outdoor recreation offering, the region should focus on this strength. Indeed, industry leaders identify park improvements or development (71%) as a focus area for outdoor recreation, followed by trail development (64%).



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.

For example, being welcoming and inclusive can have ramifications for the LGBTQ audience. 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 come to spend time with friends and family, helping them understand all there is to see and do, and where to take their friends and family when they come to visit, can enhance the visitor experience and help residents see the value of tourism in their community.

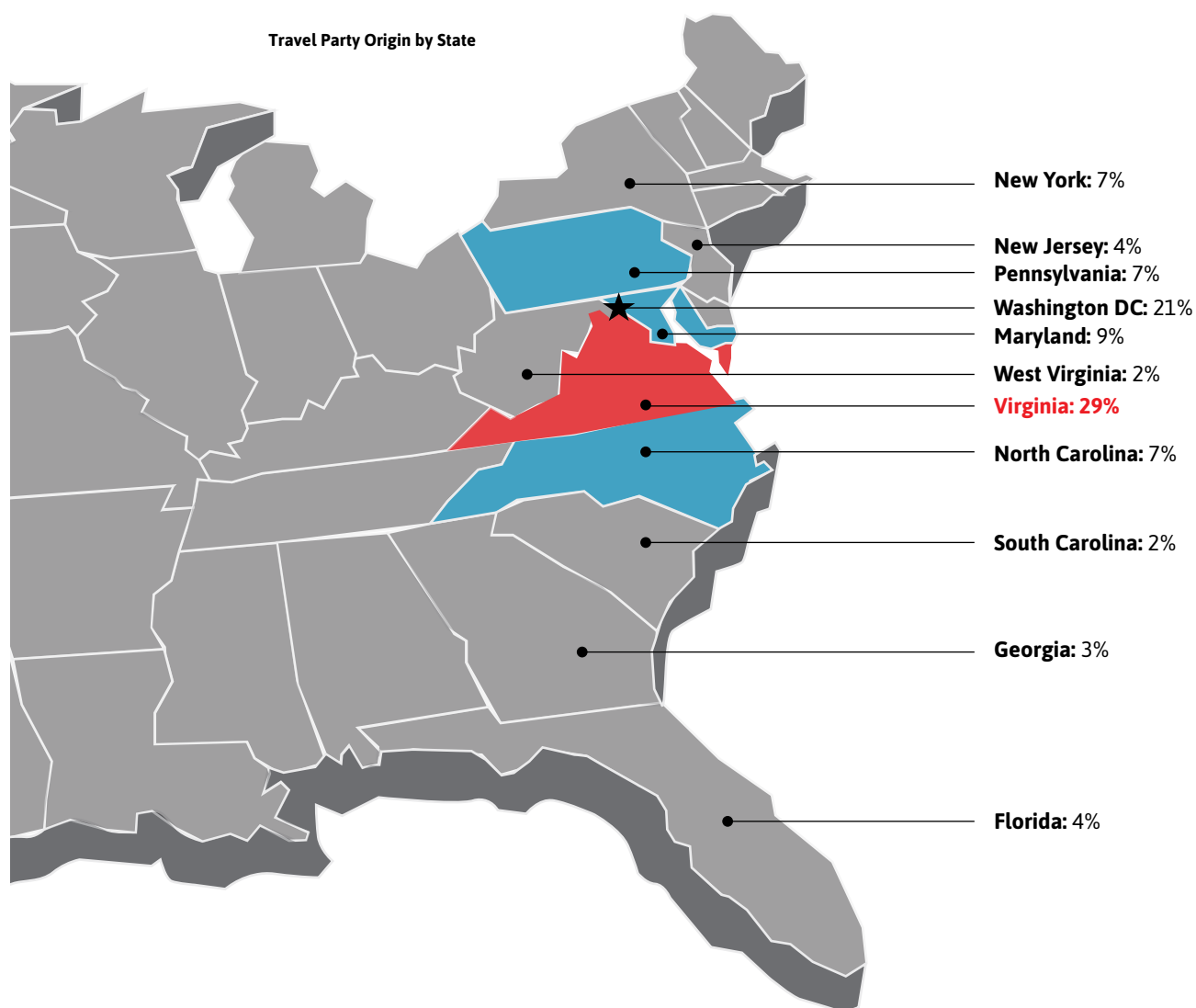
Additional opportunity audiences based on growing trends include:

TRENDS	OVERVIEW	IMMEDIATE IMPLICATIONS FOR NORTHERN 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 we should also be the ones leading 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 Northern 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>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 that pleasure travel is now a year-round activity, with shorter, more frequent trips versus the 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 3.7 nights, the Northern Virginia region is no exception, and according to a TravelTrakAmerica survey, many of Northern Virginia travelers (52%) originate from nearby drive markets — Virginia, Maryland, New York and Pennsylvania. This concentrated primary feeder area gives all of Northern Virginia’s destinations and industry leaders an opportunity to work closer together in promotional planning to target prospective visitors.



COMPETITION

Given Northern Virginia's primary history and heritage lures along with its variety of experiences, the primary competitors identified through this effort include Washington D.C., Philadelphia-Gettysburg, PA, and Maryland.

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
PHILADELPHIA + GETTYSBURG, PA	<ol style="list-style-type: none"> 1. History 2. Food and beverage 3. Outdoor
MARYLAND	<ol style="list-style-type: none"> 1. Beaches 2. Small towns 3. Baltimore / Inner Harbor / Aquarium

Competitively, while D.C. serves as an important asset for the region to draw and leverage visitors, including international travelers, it competes for visitors to stay, dine, shop, and sightsee in Northern Virginia's urban areas and rural areas. At the same time, Maryland also competes for this same visitor pool. Philadelphia has a strong historical and cultural draw, while its surrounding countryside areas offer a concentration of wineries and outdoor recreation opportunities. Northern Virginia, with its own rich history, culinary scene, culture, and nature experiences, is well-positioned to compete.

In appealing to prospective visitors, Northern Virginia destinations and travel attractions must realize that competing head to head from a siloed or individual experience perspective (my outdoor attraction versus one in the Philadelphia area) is less effective than the hub and spoke method of bundling experiences together. History alone cannot compete with D.C. But history, food, and outdoor experience makes Northern Virginia unique when compared to these key competitors. This is the hub and spoke method in action.

REGIONAL CHALLENGES (VOIDS)

As was the case in 2013, a key challenge for the area is the perception and (more often) reality of transportation congestion in the Northern Virginia region. While the addition of the D.C. Metro Silver line is helpful, wider challenges with the DC Metro system are holding back its overall effectiveness at alleviating transportation bottlenecks. And while the region continues to build express lanes on the interstates, overall, traffic congestion continues to hinder the potential for cross-visitation among destinations throughout the region.

Furthermore, there continues to be somewhat limited connectivity within the region between attractions and destinations, particularly between more Northern communities like Alexandria and Fairfax and locations like Culpeper and Rappahannock counties.

The areas closest to D.C. are also challenged in distinguishing themselves as distinct destinations from D.C. For example, visitors to Arlington National Cemetery and other attractions may not realize they are in Northern Virginia, and while areas such as Alexandria may have distinct character, there is a general sense of being part of the capital district.

General research indicates a continuing decline in visitation to historic sites and attractions — one of the region’s primary lures. History, however, must be thought of not just in terms of names and dates, but rather the cultural impact these historic events have on the community. Whether it is music, agriculture, crafts, or politics, 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. Indeed, threading themes across regions can create an even more compelling and impactful story.

AREAS OF FOCUS

- Transportation congestion
- Somewhat limited attraction/destination connectivity
- Attendance issues related to historical experiences
- Economy is too reliant on government business
- Limited recognition of differentiation from D.C. as a destination

TRENDS	OVERVIEW	IMMEDIATE IMPLICATIONS FOR NORTHERN 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 should be very appealing to this audience.</p>
<p>SHIFTING LABOR DYNAMICS</p>	<p>Available workers between the ages of 16 and 54 have been in decline for the past decade – a decline projected to continue – while the supply of workers 55 and older is projected to increase 18%. With overall population growth far outpacing working age population growth, competition for younger workers will intensify, and Baby Boomers as workers will become more important to ALL industries, including travel and tourism.</p>	<p>Assess the region’s destinations and attractions’ current workforce, as well as future workforce needs. Work with destinations and attractions to determine how workplace culture aligns with the values and priorities of a shifting workforce population. Future players could be entrepreneurs for their next stage of life.</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." Northern Virginia 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 complimentary experiences. This is especially true between towns and cities across the region.

Travel and tourism industry leaders should work together to formulate and orchestrate outdoor product development plans and initiatives that marry well with authentic historic experiences and unique shopping experiences.

TRENDS	OVERVIEW	IMMEDIATE IMPLICATIONS FOR NORTHERN 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 3.7 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 Northern Virginia region has already experienced growth in its population by 400,000 people in just the past five years. Not all regions are as lucky and Northern Virginia 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.
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. Marketing Outlook Forum also predicts that there will be a decline in luxury travel nationwide in the near future.	Washington D.C. is currently running a campaign highlighting all of the free things to do and experience. As a primary competitor, Northern Virginia must find ways to also promote free and affordable experiences. Vacations can be equally exciting and affordable no matter where they travel in the region.
SPORTS TOURISM	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. Northern Virginia is no exception. Given its proximity to DC, the region benefits from professional sports, and is home to training facilities and headquarters for both the Washington Capitals and the Washington Football Team. In addition, the region has numerous facilities that can host anything from youth sports, to professional tournaments, making it a competitive location for sporting events.

PROMOTIONAL RECOMMENDATIONS



RECOMMENDED PRIORITIES

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

1. **Promote vibrant communities and urban centers.** The Northern Virginia region has more assets that make up vibrant communities than any other region – both small historic towns and also larger urban centers. This should be celebrated. As communities throughout the region continue to invest in these assets, regional approaches should also be developed and supported. For example, consider creating itineraries that provide routes for visitors to travel from one historic main street to the next. Or perhaps, they are themed around horse culture, wineries, beer, cycling, music, or a combination.

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 Northern 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 history more of an edge by presenting Virginia's history with a twist. 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; and
 - Keeping it fresh.

With its close proximity to D.C., the region has strong competition when it comes to historic sites and attractions. Using cooperation and collaboration, how can the region enhance a more compelling narrative? One opportunity lies in the story of Black people in America. Imagine if the region were to create a trail that recognizes the complex history of Black people in America while also celebrating the exciting art, music, and entrepreneurial spirit of the local Black residents and how they are contributing to the building of vibrant communities. Northern Virginia has a unique, believable, and authentic story to tell in this regard, but it must come with everyone working together.

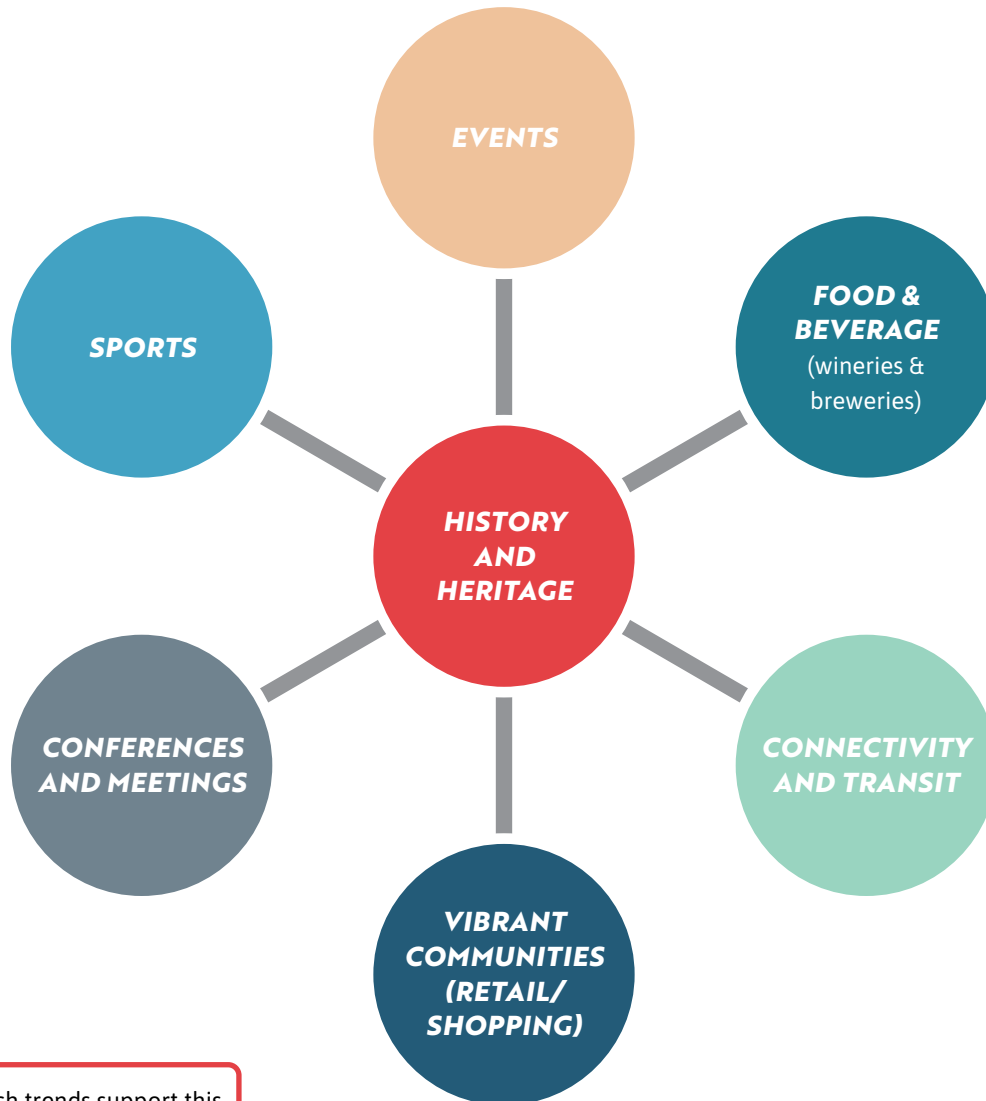
3. **Connect and promote Northern Virginia's outdoor experiences.** While almost every town and city across the region are improving their outdoor products to appeal to outdoor enthusiasts, there is an opportunity to build an even greater set of experiences by connecting each submarket's offerings together through trails, packages, and itineraries. Northern Virginia's outdoor attractions and destinations should band together to establish and promote these connections.
4. **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 Northern Virginia. Focusing on just one lure will make it more challenging for the region to compete against similar offerings in D.C. and competing regions and states.

The region has the right lures that make up vibrant communities, but they remain singularly focused and promoted. For example, the potential exists to create tours that combine a history-themed bike ride one day and a winery outing the next. And, think about how to bundle these experiences across localities to increase the unique experience and drive people to turn their day trip or overnight into a two- or three-day trip. With improvements to I-95, I-66, and the Metro's future extensions, traveling from one locality to the next may become increasingly easy.

PRODUCT DEVELOPMENT RECOMMENDATIONS

HUB & SPOKE

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



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

TREND 1

TREND 2

TREND 3

VISION FOR NORTHERN VIRGINIA

The vision for the Northern Virginia regional plan is to collaboratively expand upon the historical and heritage assets in an authentic manner and to further develop urban and rural town center environments, culinary and beverage experiences, the meeting sector, sports, and other assets — the foundation of vibrant communities — to sustainably maximize the region’s tourism potential.

SUMMARY

The Northern 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 D.C., Maryland, and Pennsylvania. 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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