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DRIVE 2.0

2020-2025 STRATEGIC TOURISM PLAN

REGIONAL PLAN: *SHENANDOAH VALLEY*

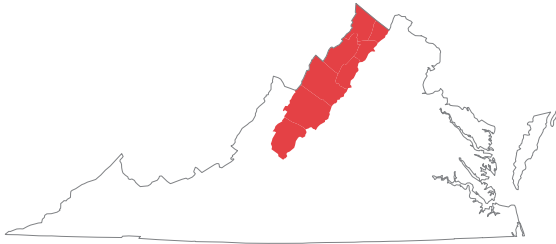
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SHENANDOAH VALLEY INTRODUCTION

The Shenandoah Valley regional plan builds upon the foundational insights established in the 2020-2025 statewide tourism plan, as well as the original 2013 DRIVE Shenandoah Valley 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 the Shenandoah Valley region 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 Shenandoah Valley region consists of the municipalities of Harrisonburg, Winchester, Staunton, Waynesboro, Front Royal, Lexington, Buena Vista, Luray, Berryville, as well as the counties of Frederick, Augusta, Rockingham, Shenandoah, Warren, Rockbridge, Page, and Clarke.

QUICK FACTS

- Population: 484,714 (4th largest of the 10 VA regions)
- Largest town/city: Harrisonburg (54,033)
- Interstates: I-81, I-66, I-64
- US-33, US-522
- Border states: WV
- Commercial airports: Shenandoah Valley Regional Airport
- Proximity to urban hubs: Washington, D.C., Baltimore, Charlottesville, and Richmond

TOURISM IMPACT

The Shenandoah Valley region accounted for \$1.5 billion in travel and tourism expenditures in 2018 (approximately 6% of the state's overall travel and tourism expenditures). Year over year, the region experienced a 5% increase in expenditures (slightly ahead of the overall Virginia state expenditure growth of 4.4%).

- **Total expenditures:** \$1.5 billion
- **Employment:** 13,871
- **Payroll:** \$290 million
- **Local tax receipts:** \$44 million
- **State tax receipts:** \$65 million

From a tourism industry perspective, in addition to tourism marketing at the destination level, the Shenandoah Valley Tourism Partnership collectively represents all of the region's visitor experiences. Also, the Shenandoah Valley Travel Association is one of the country's oldest travel organizations and collaboratively markets its member communities throughout the Shenandoah Valley region, although regional collaboration among stakeholders is recognized as an area for improvement.



LURES

Shenandoah Valley's natural and outdoor recreational opportunities, along with its history and heritage, continue to be strengths for the region. In addition, its cavern attractions, food and beverage, and arts, music, and cultural experiences remain strong offerings as well.

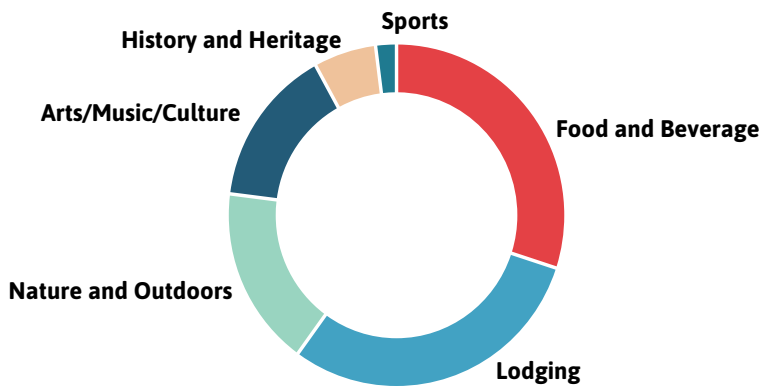
When asked to name a the primary lure for the region, industry leaders identify the following:



Nature and outdoor recreation remain key strengths for the region, as it continues to offer scenic getaways and adventure for families and outdoor enthusiasts. Well-known experiences such as the Blue Ridge Parkway, Skyline Drive, and the Appalachian Trail all run through the region, and other trails include US Bicycle Route 76, and the Virginia Birding and Wildlife Trail.

Inventory of Regional Assets

Source: VTC Research



LURES (cont'd)

In conjunction with these trails, the region offers numerous opportunities to hike, bike, horseback ride, observe wildlife, rock climb, hunt, fish, kayak, canoe, camp, and ski through a variety of assets such as the George Washington and Jefferson National Forests, Shenandoah National Park (the only National Park fully contained within Virginia), Natural Chimneys Park, and the Shenandoah River, Natural Bridge and Seven Bends state parks. Furthermore, the region has eight caverns and other natural formations including Luray Caverns, Shenandoah Caverns, Natural Bridge, and others.

In terms of lodging, the region possesses the state’s largest share of cottages and cabins and the second largest share of camping/ RV parks. In fact, Luray-Page County has the largest concentration of cabins and is called the “Cabin Capital of Virginia.” Massanutten and Bryce Resort also offer resort experiences in a natural setting, including skiing and winter activities.



LURES (cont'd)

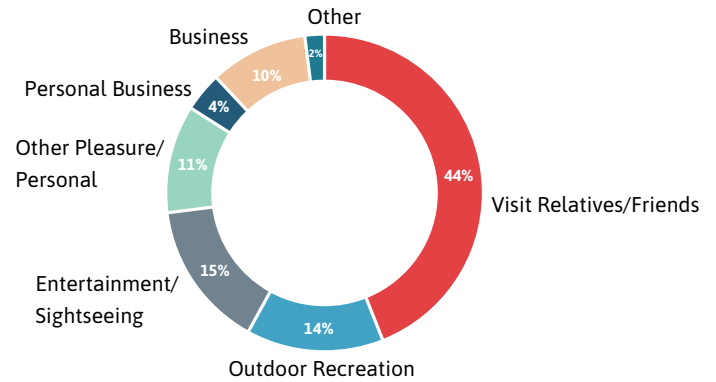
The region’s rich history makes it home to 15 battlefields and the Shenandoah Battlefields National Heritage Area. The region is also home to the historic Washington & Lee University, where General Robert E. Lee served as president after the Civil War, as well as sites devoted to those who traveled westward, settled, and farmed through the Wilderness Road – Virginia’s Heritage Migration Route, the Frontier Culture Museum, and Cyrus McCormick’s Farm.

The Shenandoah Valley offers charming and unique towns with authentic combinations of opportunities, such as wine, music, arts, agritourism, and other visitor experiences. In fact, Berryville, Harrisonburg, Lexington, Luray, Staunton, and Winchester are all designated main streets by the Virginia Main Street Program.

Other visitor opportunities in the region include 28 wineries, 25 breweries, and countless agritourism attractions. For sport enthusiasts, the region also offers collegiate athletics at James Madison University and Virginia Military Institute.

While the region offers a range of visitor opportunities and attractions, they are dispersed throughout the region. However, the Blue Ridge Parkway, Skyline Drive, Appalachian Trail, Interstate 81, wine trails and other outdoor trails help to connect attractions and destinations.

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

Shopping	30%
Visiting Relatives	28%
Rural Sightseeing	24%
Historic sites/Churches	22%
Museums	19%
Visiting Friends	18%
Fine dining	16%
National parks/Monuments	14%
State parks/Momuments	13%
Hiking/backpacking	12%

HIGHLIGHTS OF REGIONAL LURES

- Scenic beauty and outdoor recreation opportunities
 - Appalachian Mountain Range, notably the Blue Ridge Mountains
 - Nature-oriented assets: Appalachian Trail, Blue Ridge Parkway, Skyline Drive, George Washington & Jefferson National Forests, Shenandoah National Park, Luray Caverns, Shenandoah Caverns, and numerous others
 - State parks: Natural Bridge State Park, Seven Bends State Park, and Shenandoah River State Park
- Civil War history
- Virginia Main Streets: Berryville, Harrisonburg, Lexington, Luray, Staunton, Winchester
- Notable Towns, Cities and Counties: Lexington, Front Royal, Luray-Page County, Shenandoah County, Buena Vista
- Resorts: Massanutten, Bryce, offering skiing and outdoor recreation
- Name recognition of Shenandoah Valley
- Interstate connectivity
- Cabin, camping, and campground availability: Luray-Page County known as the “Cabin Capital of Virginia”
- Virginia Horse Center

CHANGES OVER THE PAST FIVE YEARS

The past five years have seen the addition of new beverage trails in the region. First, the Shenandoah Spirits trail offers a selection of wineries, craft breweries, cideries and distilleries spanning from Harrisonburg to Winchester and Frederick County. Along the way are incredible mountain views, historic treasures, farm-to-table dining, charming downtowns, and an amazing diversity of outdoor recreation. Also, with 15 breweries all located within an hour's drive from one another, the Shenandoah Beerwerks trail provides an opportunity for tourists and locals to connect with a great craft beer experience. Last, the Blue Ridge Whisky Wine Loop connects wineries, distilleries and breweries with dining, lodging and more in the area surrounding the Shenandoah National Park.

The Fields of Gold Farm Trail was established to provide opportunities to discover the homegrown side of Virginia and its agricultural roots. Along the trail, farmers share their experiences and agritourism events include Christmas tree cutting and blueberry picking. Wade's Mill, a registered Virginia Landmark and also on the National Register of Historic Places, offers stone-ground, preservative-free flours, grits, and cornmeal.

In 2013, leaders identified the need for more outfitters to support the growing outdoor recreation offering, and the region now boasts more than 30 outfitters, as outdoor recreation continues to grow as a core asset of the region — punctuated by the opening of Seven Bends State Park in Shenandoah County.





CHANGES OVER THE PAST FIVE YEARS (cont'd)

Finally, the past five years have witnessed the addition of several event and lodging venues. In Lexington, 2015 marked the first full year of operation following the complete restoration of the Robert E. Lee Hotel and The Georges, which also acquired, renovated, and opened the nearby Patton Room in 2019 to host upscale social events, weddings, and senior-level conferences. The Seclusion, an exclusive boutique barn venue situated on 72 private acres outside Lexington, also opened its doors.

Luray-Page County welcomed the renovation and opening of the upscale all-suite boutique Hotel Laurence, a former 1830 hotel on Main Street in Luray, as well as Faithbrooke Barn and Vineyards for weddings and events and the addition of a new “rustic and chandelier” 5,000-square-foot event barn at Stoneyman Valley Ranch.

In Staunton, renovation of the Old Western State Hospital was completed in 2018 and rechristened as the Blackburn Inn. Also in 2018, the Hotel Madison and Shenandoah Valley Conference Center opened in Harrisonburg, and in just one year it has achieved full or nearly full occupancy. The venue offers an expansive suite of services for meetings and various sizable events, filling a previous void in the region.

FUTURE PRODUCT OPPORTUNITIES

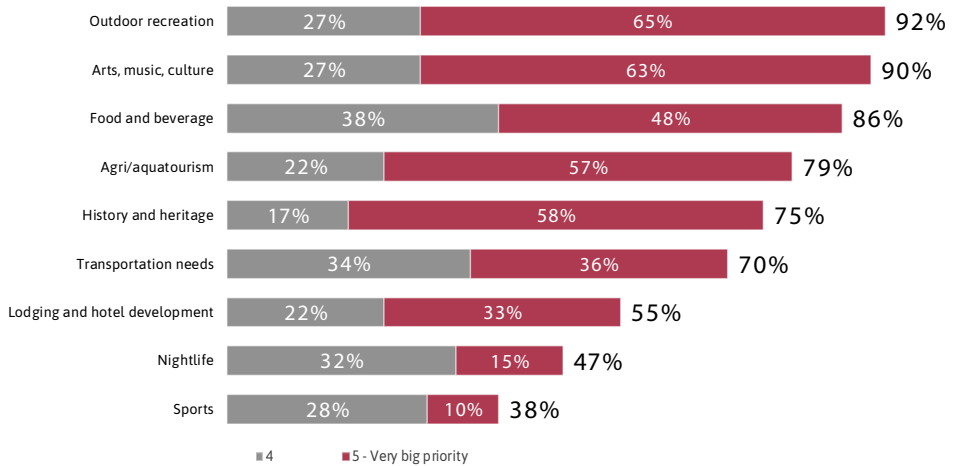
According to the Office of Outdoor Recreation, Virginia’s outdoor recreation industry contributes nearly \$22 billion annually to the Virginia economy and supports the livelihoods of more than 197,000 Virginians. In addition, outdoor recreation is cited by one in four Virginia visitors as one of their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

As such, in the DRIVE 2.0 strategic plan development survey, The Shenandoah Valley’s travel and tourism industry leaders identify outdoor recreation as a priority need — particularly when it comes to better understanding how to develop and promote outdoor recreation product offerings and experiences.

Featuring the Appalachian Mountain Range, notably the Blue Ridge Mountains, the region’s strength lies in its nature and outdoor recreational opportunities — the scenic getaways and adventures it offers through its mountainous landscape, waterways, forests, and other outdoor features. Well known experiences such as the Blue Ridge Parkway, Skyline Drive, and the Appalachian Trail all run through the region, and outdoor experiences couple well with the over 200 agritourism experiences available in the region.

As such, an exciting opportunity for the region that should continue to be a priority for industry stakeholders is the build-out of the Fields of Gold program into a sustainable initiative that can support future growth opportunities like a Tour de Farm program. This program could highlight cycling trails that connect Fields of Gold stakeholders and sites with the cycling community featured through the Bike the Valley program. The current footprint includes the counties of Rockbridge, Augusta, Rockingham, Highland, and Bath, the cities of Buena Vista, Harrisonburg, Lexington, Staunton and Waynesboro, as well as the 11 towns.

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



When it comes to new opportunities in the area of outdoor recreation, 80% of stakeholders identify trail development and hiking as priority areas, followed by 75% identifying park improvements. There appear to be good tie-ins connecting outdoor experiences with wine and beer, and these efforts should continue to be a focus. Leveraging Front Royal’s designation as the “Canoe Capital of Virginia” and developing more water trails on the Shenandoah River, as well as bike trails throughout the region, will be opportunities to explore, and there is potential to create more winter sports events to attract the college population.

In terms of the lodging landscape, the region has more than 400 rustic lodging options with cabins, cottages, inns, B&Bs, camping and RV parks. Yet, there has not been a feasibility study to fully assess the lodging landscape and what, if any, additional types of lodging are needed. Some stakeholders identify lodging options as being dated, and the region offers 150 hotels with few being in the upper to luxury category.

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



FUTURE PRODUCT OPPORTUNITIES (cont'd)

Arts, music, and cultural experiences are another priority area for the region. Concepts like regional artistic works displayed along the Appalachian Trail, developing a music trail, or fostering additional arts and cultural districts similar to that in Harrisonburg represent prime opportunities to make an impact in this space. In addition, exploring ways to tie-in mountain culture with arts and music, along with the college population, could prove unique and interesting for the region.

In 2014, the Shenandoah Valley Tourism Partnership was formed, which includes Lexington-Rockbridge Area Tourism, City of Waynesboro, City of Staunton, Augusta County, Rockingham County, City of Harrisonburg, Shenandoah County, Luray-Page County, Winchester-Frederick County, Clark County, and Front Royal-Warren County. In 2017, the partnership launched a marketing campaign for the valley region, and while this partnership is primarily focused on promotional efforts, there is a great opportunity for these leaders to connect their region through combined experiences.

AREAS OF FOCUS

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

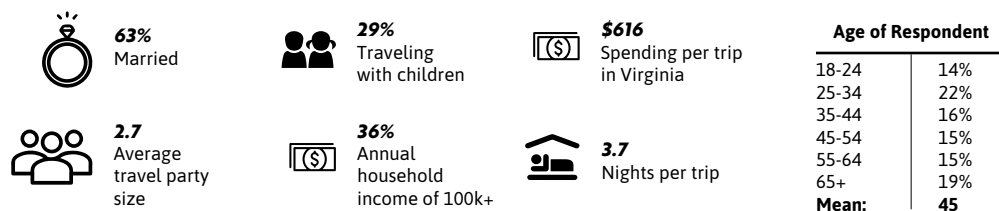
- **Primary:**
Nature & Outdoor Recreation (Trails), Town/City Centers, Lodging, Arts & Music, Events
- **Secondary:**
History & Heritage, Meetings (Meetings & Conferences), Sports, Industry (Corporate/Business Base), Culinary (Agritourism, Dining, Libations)





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.

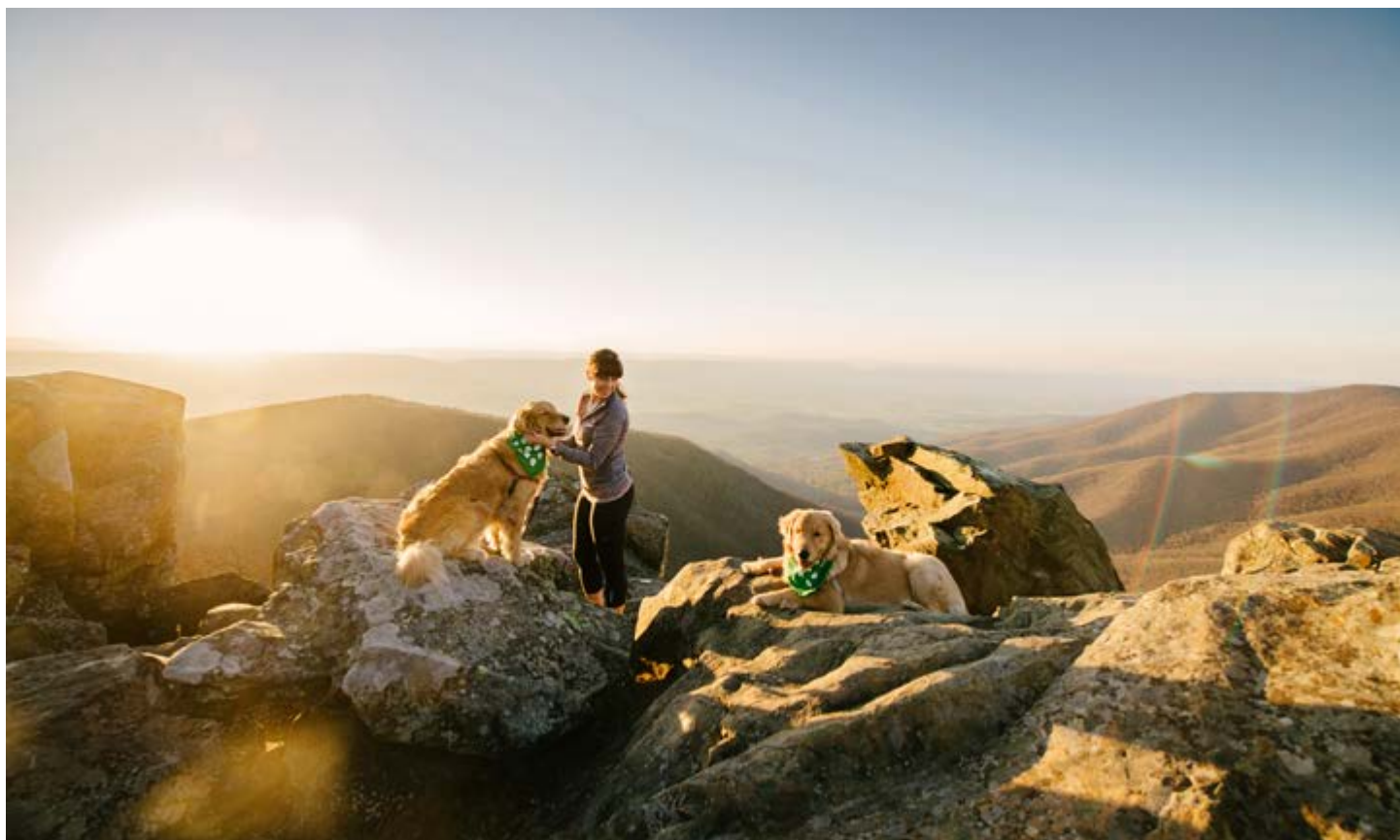
In addition, operators across the board are showing significant increases in female visitation, especially in outdoor and active travel experiences, which represents another opportunity to increase the region's customer base. So, whether promoting a girl's trip or a solo adventure, a heightened focus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

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.

EMERGING NICHE MARKETS (cont'd)

Additional opportunity audiences based on growing trends include:

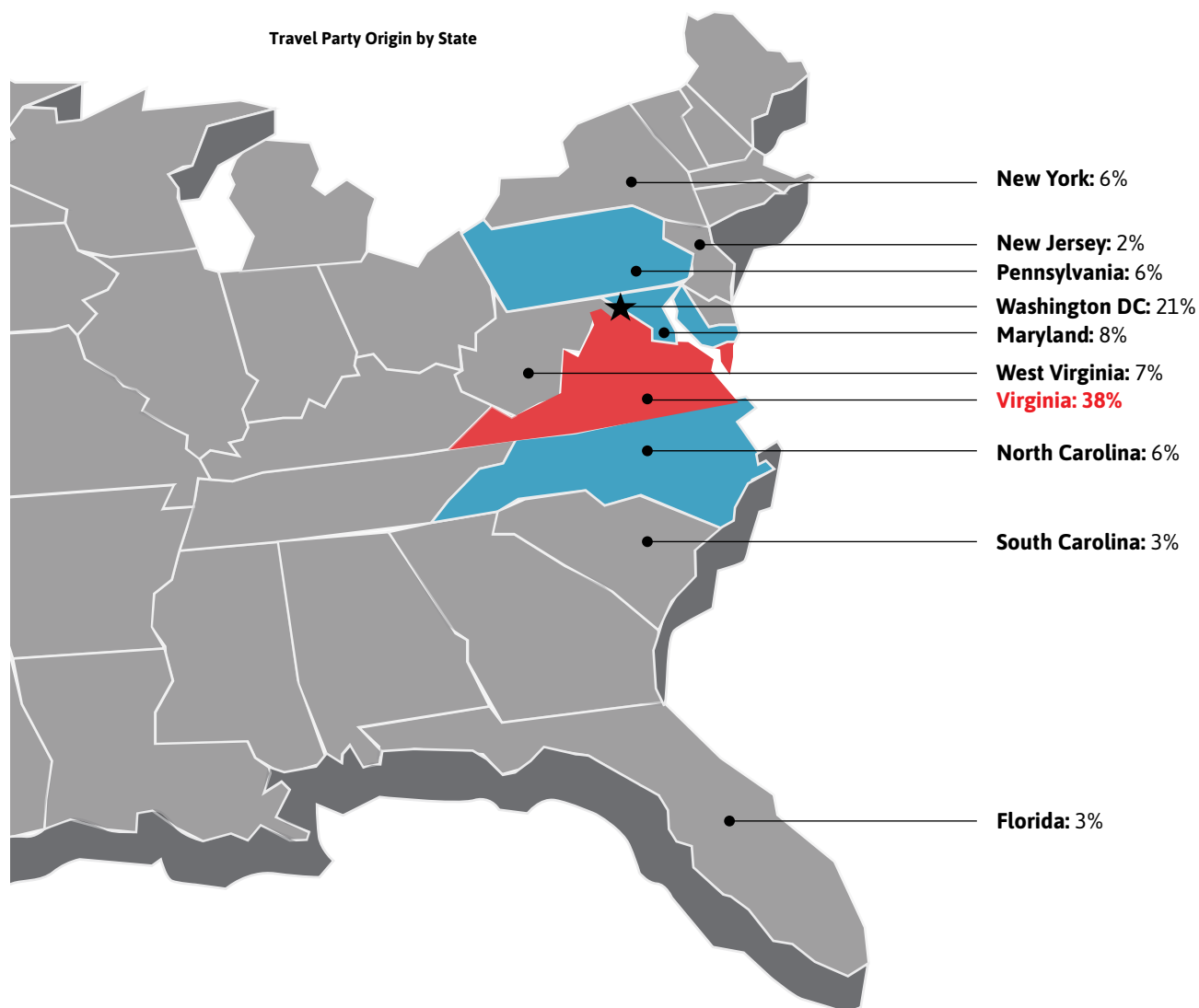
TRENDS	OVERVIEW	IMMEDIATE IMPLICATIONS FOR SHENANDOAH VALLEY
OUTDOOR RECREATION	<p>The outdoor recreation industry contributes nearly \$22 billion annually to the Virginia economy and supports the livelihood of more than 197,000 Virginians. Outdoor recreation is cited by one in four Virginia visitors 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. Pour resources into these experiences and think about ways to connect experiences across localities. Trail development is a great place to start.</p>
MINI-CATIONS	<p>According to Allianz, over half of Americans did not take a vacation longer than four nights last year. Millennials are leading this movement.</p>	<p>Campaigns like the recent Crush Friday are a great example of efforts to take advantage of this trend. Consider other marketing campaigns and packages that encourage younger generations to take their vacation for a long weekend trip. Since Shenandoah Valley region's average length of stay is already 3.7 nights, there is opportunity to build on the 72-hour trip experience.</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 3.7 nights, the Shenandoah Valley is no exception, and according to a TravelTrakAmerica survey, the majority of Shenandoah Valley travelers (52%) originate from Virginia, West Virginia and Maryland. This concentrated primary feeder area gives all of the Shenandoah Valley’s destinations and industry leaders an opportunity to work closer together in promotional planning to target prospective visitors.



COMPETITION

Given the Shenandoah Valley's primary natural and outdoor recreation lures, the primary competitors identified through this effort include North Carolina, Eastern Tennessee and West Virginia.

Additional opportunity audiences based on growing trends include:

COMPETITOR	PRIMARY LURES
NORTH CAROLINA	<ol style="list-style-type: none"> 1. Outdoor recreation 2. Asheville / Smoky Mountains 3. Professional sports (basketball, football, NASCAR)
EASTERN TENNESSEE	<ol style="list-style-type: none"> 1. Dollywood 2. Great Smoky Mountains 3. Shopping
WEST VIRGINIA	<ol style="list-style-type: none"> 1. Outdoor recreation (hiking, whitewater rafting, skiing) 2. Entertainment (Casinos, spas) 3. Hunting / fishing

As noted in 2013, the region has difficulty differentiating itself from these competitive destinations — mainly due to the fact that they offer similar recreational opportunities and are more competitively marketed and therefore have more brand recognition. In addition, many active outdoor experiences in these competitive markets are clustered in close proximity to one another. For example, West Virginia and Tennessee outdoor recreation opportunities are concentrated, offering opportunities for families and outdoor enthusiasts to experience many activities in one centralized area. Eastern Tennessee is also well promoted for its outdoor experiences and packages for rafting, zip lines, ropes courses, etc. Western North Carolina, including Asheville and its surrounding towns, not only offer outdoor recreation (rafting, zip line, fishing, camping), but it also shares the Blue Ridge Parkway and Blue Ridge heritage with Virginia. Asheville has also developed into a strong arts and culinary destination, recognized for local farm-to-table restaurants, high-profile chefs and restaurants, and craft breweries.

In appealing to prospective visitors, Shenandoah Valley destinations and travel attractions must realize that competing head to head from a siloed or individual experience perspective (my outdoor attraction versus one in Asheville) is less effective than the hub and spoke method of bundling experiences together. While these states also offer mountain town experiences, including heritage, arts, and culture, the Shenandoah Valley region is differentiated by its own unique history and towns with an authentic combination of additional opportunities, such as wine, music, arts, agritourism, and other visitor experiences. This is the hub and spoke method in action.

REGIONAL CHALLENGES (VOIDS)

One of the Shenandoah Valley’s challenges continues to be the lack of differentiation from nearby states, especially when it comes to the outdoors. The region must work collaboratively to create a compelling story that expands beyond just natural beauty to include the variety of assets and offerings the entire region has to offer.

Since the region is expansive and covers a broad portion of Virginia from north to south, the challenge lies in how to connect experiences dispersed throughout the region. Some great efforts have been made with the beer and spirits trails and continuing to focus efforts around trail developments — like biking, music, arts or a combination — will contribute greatly to leveraging all the region has to offer.

Upscale lodging continues to be another void in the Shenandoah Valley. As such, the region should consider studying the feasibility of increasing lodging options and what is needed to enhance visitor experience and drive up room nights. The number of universities and colleges in the region should help contribute to the ongoing need for lodging.

AREAS OF FOCUS

- Differentiation from competition in nearby states — outdoors
- Experiences are dispersed throughout the region
- Limited recognition of assets and towns
- Limited upscale hotel supply

TRENDS	OVERVIEW	IMMEDIATE IMPLICATIONS FOR SHENANDOAH VALLEY
<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>SHIFTING FOOTPRINT</p>	<p>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.</p>	<p>The Shenandoah Valley may be at risk of this trend, given the region is more rural than it is urban. To face the rising economic challenges of declining rural populations and accompanying tax revenue, the region must invest resources in tourism as an economic engine. Positioning the destination’s travel and tourism assets and identifying ways to expose potential new residents to the area is critical.</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." Shenandoah Valley 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 is especially true between towns and cities across the region. With the region's amazing outdoor assets and infrastructure, industry leaders should work together to formulate and orchestrate outdoor product development plans and initiatives to tie the region together.

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 younger generations of travelers — Gen X and Millennials. The Shenandoah Valley's heritage tourism assets must work together to make history as appealing as possible to as wide an audience as possible.

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

TRENDS	OVERVIEW	IMMEDIATE IMPLICATIONS FOR SHENANDOAH VALLEY
SUSTAINABLE TRAVEL	There is a growing economy and movement toward stewardship of the Earth and our cultures. Destinations and attractions are participating in this movement by promoting low impact and green experiences and practices.	In a region rich with natural assets, wildlife, and small towns, low-impact experiences are important. Think about ways to highlight the low impact visitors will have on nature, the wildlife, and the small towns. In visiting, they can contribute to the vibrancy of the local economy in a sustainable way so generations can continue to enjoy the beautiful region and its rich culture.
SPACE	While not everyone can afford a trip to space, interest in space is growing. Dark Sky locations, observatories, and even stations are growing in popularity.	The Shenandoah Valley has immense opportunity to capitalize on this growing trend of dark skies given the breadth of parks, forests, and rural areas. The region has an opportunity in potentially seeking out official designations to add to its offerings.
CAMPING	Camping and glamping are 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 a more traditional trip in a campground, with a bike tour, a craft brew, and a campsite under the stars.

PROMOTIONAL RECOMMENDATIONS



RECOMMENDED PRIORITIES

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

1. **Connect and promote Shenandoah Valley'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. Shenandoah Valley'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 meanders 57 miles through four counties while paralleling the river for which it's named. The Heart of Appalachia Bike Route comprises 128 miles of roads and trails in Tazewell, Bland, Russell, and Wise counties. How can the Shenandoah Valley tie the region together through bike trails? Also, leaders should think not only about more inter-jurisdictional trails, but also the network for local feeder trails. The Tour de Farm is a great place to start.
 - **Water Trails:** Shenandoah Valley is home to 17 rivers and streams, second only to the Central Virginia region. No wonder numerous stakeholders in Shenandoah Valley reference enhanced river experiences as a future opportunity to create more outdoor experiences for the region's visitors. Working together, the DMOs of Shenandoah Valley can tie the rivers together into world-class water experiences.

To get inspired about how to formulate a nationwide 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 Shenandoah Valley region and the slow decline in the appeal of heritage tourism, the entire region of 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 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
- Keeping it fresh

The Shenandoah Valley 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 Americans. 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. Given the strong Civil War narrative in the region, this approach is especially compelling. The Shenandoah Valley has a unique, believable, and authentic story to tell in this regard, but it must come with everyone working together.

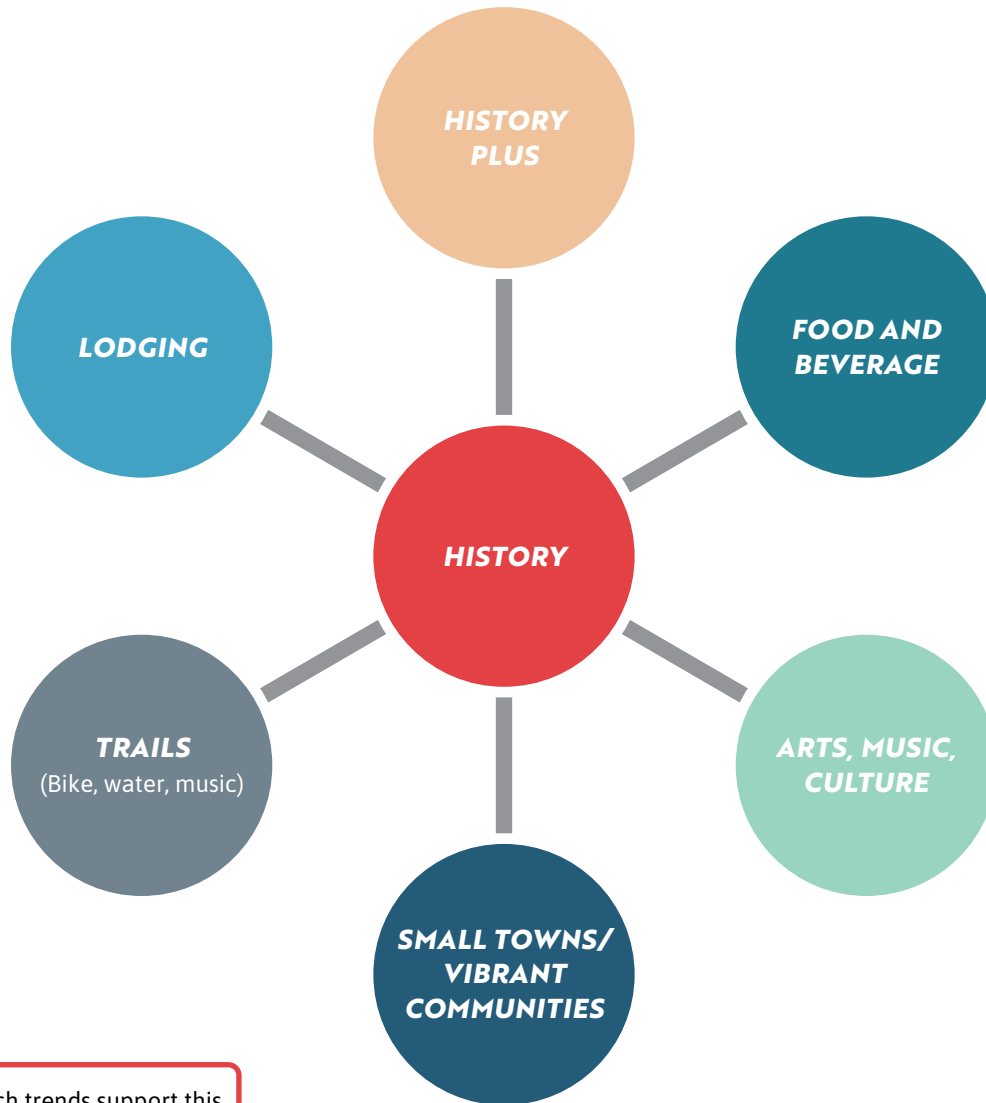
3. **Promote Vibrant Communities.** The Shenandoah Valley region has many assets that make up vibrant communities. As communities throughout the region continue to invest in these assets — arts, music, events, culinary — regional approaches should also be developed and supported. For example, consider creating itineraries that provide routes for visitors to hop from one historic main street to the next. Or, perhaps, they are themed around horse culture, wineries, beer, cycling, music, or a combination.
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 the Shenandoah Valley. 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, but they remain relatively isolated. For example, potential exists to create weekend itineraries that allow visitors to paddle board on the river, brewery hop, catch a concert, and stay in a unique cabin or B&B. Or, the region could offer tours that combine a history-themed bike tour one day and a brewery tour 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 because they recognize all they can see and do.

PRODUCT DEVELOPMENT RECOMMENDATIONS

HUB & SPOKE

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



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

TREND 1

TREND 2

TREND 3

VISION FOR SHENANDOAH VALLEY

The vision for the Shenandoah Valley regional plan is to collaboratively build upon its historical and heritage assets and unique small-town atmospheres 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 Shenandoah Valley 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, Tennessee, and West Virginia. 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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