



# The Economic Impact of Heritage Tourism in Virginia



**VCU**

Center for Urban and Regional Analysis  
L. Douglas Wilder School of Government and Public Affairs

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# **The Economic Impact of Heritage Tourism in Virginia**

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**Preservation Virginia**

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## EXECUTIVE SUMMARY

This report, which was commissioned by Preservation Virginia, documents the economic impacts of heritage tourism on the Virginia economy. To mark its 125<sup>th</sup> anniversary of preservation advocacy, Preservation Virginia engaged the Center for Urban and Regional Analysis (CURA) at Virginia Commonwealth University to conduct a trilogy of studies of the impacts of preservation-related policies on the Virginia economy. This is the third of those studies.<sup>1</sup>

### ***What is Heritage Tourism and Why is It Important?***

“Heritage Tourism is traveling to experience the places and activities that authentically represent the stories and people of the past and present.”<sup>2</sup>

In the past few decades, heritage has become an important aspect of tourism development strategies to attract visitors who seek a unique and rewarding experience. Heritage tourism, especially in Virginia, is a major contributor to the economy, generating jobs and tax revenues.

### ***Heritage Tourism in Virginia – Visitation***

Virginia offers a wide array of attractions – beaches, mountains, historic places and local cultures.

The state is steeped in history, with striking physical reminders of its

Native American, Colonial, Revolutionary and Civil War periods. Virginia’s unique geography and history have made it one of the top ten most-visited states for Heritage Tourism. Every year, on average, 50 million person-trips are taken to Virginia tourist sites. Approximately 85% of those visits can be classified

**Table 1. Annual Domestic and International Visitation<sup>1</sup> to Heritage Tourism Sites in Virginia**

Domestic Visitation	
Estimated Annual Visitation to Virginia <sup>2</sup>	50,000,000
Heritage Tourism as % of Overall Visitation	85%
Estimated Annual Visitation to Virginia Heritage Sites	42,500,000
Overnight Visitation (84%)	35,700,000
Daytrip Visitation (16%)	6,800,000
International Visitors	387,000
<b>Total Annual Visitation to Virginia Heritage Sites</b>	<b>42,887,000</b>

Sources: TNS Survey Results provided by Virginia Tourism Corporation; Crusa 2012; Travel Industry Association of America TravelScope survey, 2004.

<sup>1</sup> Includes Virginia residents visiting Virginia tourist sites. Domestic visitation estimate is based on person-trips (number of visitors multiplied by the number of trips in a certain year), while international visitors data express simply the number of international travelers entering Virginia in a certain year.

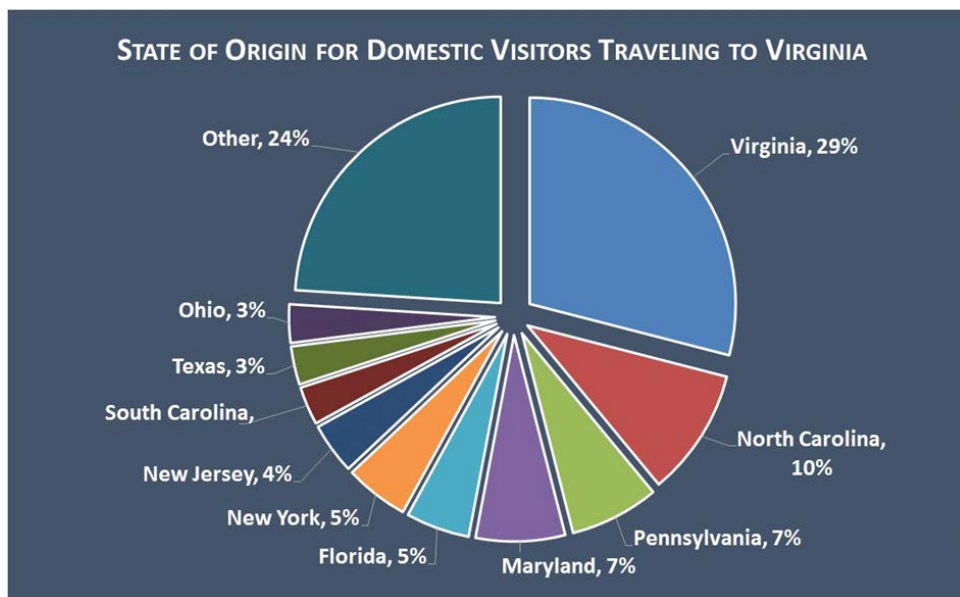
<sup>2</sup> This estimate was obtained by combining TNS Survey results with other national sources on heritage tourism that consistently rank Virginia among the top states in the Country for number of visitors. The estimate was then vetted by experts in the field of Tourism research.

<sup>1</sup> The first report: *Economic Impact of Historic Rehabilitation Tax Credit Programs in Virginia* was completed in January 2014. The second report: *30 Years of Impact: How the Main Street Program has Revitalized Virginia Communities*, was completed in June 2015.

<sup>2</sup> National Trust for Historic Preservation: *Cultural Heritage Tourism 2010 Fact Sheet*, <http://ctmainstreet.org/wordpress/wp-content/uploads/2010/09/C-2010-CHT-FactSheet.pdf>

as heritage tourism activities. Of these, 84% include one or more nights spent in Virginia, while only 16% are day-trips. The vast majority of these trips are from domestic visitors.

Virginia residents make up the largest single group of domestic visitors (29%), followed by residents of North Carolina (10%), Pennsylvania (8%) and Maryland (7%).



Virginia experiences significant international tourism as well, receiving about 387,000 visitors in 2012. The vast majority of these visitors come from Western Europe (45%), 17% comes from Asia, and 7% - 8% each come from South America, the Middle East, Central America, and Central Europe.



### ***Heritage Tourism in Virginia – Spending***

Heritage tourism is an important driver of Virginia's economy. Tourists who come to Virginia buy goods and services, such as food, lodging, gasoline and gifts. On average, tourists who stay overnight spend \$458 per household per trip, while day-trip tourists spend approximately \$340. International travelers spend approximately \$1,134 per person, per trip.

Breakdown of Average Visitation Spending per trip in Virginia			
Spending Category	Average Spending (%)	Average Spending by US Household (Constant 2015 Dollars)	Average Spending by International Travelers (Constant 2015 Dollars)
Lodging (overnight travelers only)	26%	\$118.21	\$294.84
Transportation - excluding parking & tolls	20%	\$89.84	\$226.80
Transportation - parking & tolls	2%	\$7.67	\$22.68
Gasoline	12%	\$56.54	\$136.08
Food (excl. groceries)	19%	\$86.71	\$215.46
Food (groceries)	5%	\$23.43	\$56.70
Entertainment (excl. gaming)/Admission	5%	\$24.82	\$56.70
Entertainment (gaming)	1%	\$4.18	\$11.34
Shopping (gifts, souvenirs)	7%	\$32.66	\$79.38
Amenities (golf fees, spa, health club, ski passes, etc.)	1%	\$4.67	\$11.34
Other	2%	\$9.16	\$22.68
<b>Average Spending by household for overnight visitation</b>		<b>\$458.47</b>	
<b>Average Spending by household for day-trip visitation (exclude lodging)</b>		<b>\$340.11</b>	
<b>Average Spending per person by International Travelers</b>			<b>\$1,134</b>

Source : TNS Survey Results provided by Virginia Tourism Corporation; CRUSA, 2012

Overall, heritage tourists spend almost \$7.7 billion each year in Virginia.

Total Annual Expenditures of Domestic and International Heritage Travelers to Virginia (Constant 2015 Dollars)	
Annual Expenditures of Domestic Overnight Heritage Travelers	\$6,343,950,609
Annual Expenditures of Domestic Daytrip Heritage Travelers	\$896,415,397
Annual Expenditures of International Heritage Travelers	\$438,775,960
<b>Total Annual Expenditures of All Heritage Travelers</b>	<b>\$7,679,141,967</b>

Source : TNS Survey Results provided by Virginia Tourism Corporation; CRUSA, 2012

### ***The Economic Impact of Heritage Tourism***

The \$7.7 billion spent by heritage tourists, plus more than \$430 million spent by heritage tourism sites for operational expenditures (a conservative estimate), ripple throughout the economy, giving an additional boost of \$6.5 billion to the economy and generating \$1.3 billion in taxes.<sup>3</sup> Thus, the total impact of heritage tourism spending comes to:

<sup>3</sup> This is net of leakage of spending outside Virginia as goods and services suppliers make purchases from non-Virginia sources.

- \$6.5 billion of additional economic activity, including more than \$3.3 billion in employee paychecks for all affected industries (not just tourism).
- More than \$640 million in State and local taxes, and more than \$700 million in Federal taxes.
- More than 105,000 jobs are supported by the direct and indirect impacts of heritage tourism spending in Virginia.

Estimated Impacts of Heritage Tourism Associated Expenditures* in Virginia				
	Direct	Indirect	Induced	Total
Labor income	\$2,259,608,915	\$409,846,868	\$687,120,782	\$3,356,576,565
Value added	\$2,969,876,284	\$667,703,039	\$1,224,011,743	\$4,861,591,066
Economic Impact	\$3,476,285,420	\$1,066,458,341	\$1,935,811,034	<b><u>\$6,478,554,794</u></b>
Employment Impact (number of jobs)	82,217	7,462	15,694	<b><u>105,373</u></b>
Tax Impact State and local				<b><u>\$640,529,476</u></b>
Tax Impact Federal				<b><u>\$709,371,990</u></b>

Source : Estimates developed on TNS, CRUSA and CURA Survey data by the Center for Urban and Regional Analysis at VCU, using IMPLANPro™. Inflation adjustments made using the U.S. Bureau of Labor Statistics' "Consumer Price Index for All Urban Consumers".

Note: All dollar values are in 2015 Dollars

\* Expenditures include visitor spending and expenditures (including payroll) of almost 300 heritage tourism sites in Virginia

Major industries affected by heritage tourism are Food Services (more than \$1.4 billion in economic activity and more than 25,000 jobs supported), Transportation (over \$1 billion and almost 22,000 jobs), and Trade – both wholesale and retail (almost \$700 million in economic activity and over 33,000 supported jobs).

### ***Heritage Tourism at the Community Level – Case Studies***

Three case studies were conducted, which explain how heritage tourism is organized in Virginia, how it achieves the significant benefits presented above, and what it means to the communities that organize and promote it. Each of the three regions specializes in a different aspect of heritage tourism. In Northern Virginia, it is primarily the built environment and the periods of American history represented in it – Colonial, Revolutionary, Civil War, and 20<sup>th</sup> Century. Historic preservation efforts began in 1932 here, so the region has a dense network of preservation-related organizations that collaborate on initiatives and work closely with local government and others.

In Southwest Virginia, heritage tourism is primarily centered upon the culture of country music, now marketed through the Crooked Road, and skilled crafts, now marketed through the Round the Mountain initiative and at Heartwood: Southwest Virginia's Artisan Gateway. Although country music and skilled crafts began to evolve in this region two centuries ago, tourism and



marketing efforts have significantly increased recently, as the region, with the assistance of the Virginia Department of Housing and Community Development and other state agencies, has sought to use heritage tourism as one means of revitalizing the region's economy. These initiatives are intentionally region-wide in scope.

On the Eastern Shore, it is primarily the natural beauty of the Shore and the Chesapeake Bay that draws tourists. With the help of strategic planning assistance from the Virginia Tourism Corporation that has mapped out an artisan trail, and state investments in welcome and interpretive centers, heritage tourism advocates and entrepreneurs are developing and marketing the Shore's other assets – its rich history, for example – to encourage visitors to stay longer, explore the Shore's many charming towns, and still enjoy the slower pace of the life there.



## Introduction

In 2014 Preservation Virginia celebrated 125 years of advocacy to preserve and revitalize Virginia's cultural, architectural, and historic heritage. To mark this anniversary and to underscore the important role that public policy plays in historic preservation, Preservation Virginia commissioned three studies from the Center for Urban and Regional Analysis (CURA) at Virginia Commonwealth University to document the positive impacts of preservation-related policies on the Virginia economy. This report, which describes the economic impacts of heritage tourism, is the third of those studies.<sup>4</sup>

### **What is Heritage Tourism?**

"Heritage tourism is traveling to experience the places and activities that authentically represent the stories and people of the past and present." This definition, provided by the National Trust for Historic Preservation,<sup>5</sup> captures the breadth of the concept of heritage tourism. Traveling to visit places and activities is easy to comprehend, but what, exactly, is *heritage*? Heritage embodies history, but not a history that is done and over with. It is history that lives with us still, as we tell the stories of things that have happened and that have influenced who we are, and as we experience and appreciate what we have inherited – physical, built history, to be sure, but also the natural environment and human culture that continues. Dictionary synonyms for the word heritage include inheritance, legacy, custom, and culture.

A national survey conducted by Mandala Research (2009) found that leisure travelers have a particular interest in experiences where the historical character of the region and site has been retained.<sup>6</sup> Virginia is steeped in history and boasts breathtaking natural landscapes and a rich cultural heritage. These assets have propelled Virginia to be one of the Top 10 states in the United States for heritage tourism.<sup>7</sup> In Virginia, heritage includes everything from the Jamestown Settlement, to George Washington's Mount Vernon and historic homes in Alexandria, to Civil War battlefields and the White House of the Confederacy, to Frank Lloyd Wright's Pope-Leighy House, to the National Wildlife Refuge on Chincoteague Island and Natural Bridge, and to the

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<sup>4</sup> The first report: *Economic Impact of Historic Rehabilitation Tax Credit Programs in Virginia* was completed in January 2014. The second report: *30 Years of Impact: How the Main Street Program has Revitalized Virginia Communities*, was completed in June 2015.

<sup>5</sup> National Trust for Historic Preservation: *Cultural Heritage Tourism 2010 Fact Sheet*, <http://ctmainstreet.org/wordpress/wp-content/uploads/2010/09/C-2010-CHT-FactSheet.pdf>

<sup>6</sup> U.S. Cultural and Heritage Tourism Study (October 2009) conducted by Mandala Research, LLC for U.S. Cultural & Heritage Tourism Marketing Council, U.S. Department of Commerce, and Gozaic/Heritage Travel Inc., a subsidiary of the National Trust for Historic Preservation

<sup>7</sup> Travel Industry Association of America: *TravelScope* survey, 2004.

annual Floydfest Country Music Jamboree and Friday night concerts at the Draper Mercantile. It includes food and wine festivals, farmers' markets and historic Main Street downtowns. The Mandala Research study identified the following types of attractions as part of the heritage that draws tourists.

- Arts, Fine and Performing Arts, as well as Arts Venues
- Battlefields
- Bridges
- Historic Buildings
- Cemeteries
- Churches and Regional Religious Heritage
- Culinary Activities
- Farms and Ranches
- Historic Districts
- Historic Sites
- Historic Trails and Natural Features
- Natural Attractions
- Parks
- Private Residences
- Public Buildings
- Schools and Colleges
- State Historical Markers
- Trails, Roads, and Waterways

According to the Travel Industry Association of America, "Most cultural travelers want to enrich their lives with new travel experiences. This is particularly true among those aged 18-34, 75 percent of whom say that trips where they can learn something new are more memorable to them."<sup>8</sup> Heritage travel volume in the United States increased by 13% from 1996 to 2002.<sup>9</sup>

### **Who are Heritage Travelers in the United States?**

Compared to the average traveler, heritage tourists in the United States tend to be a bit older, wealthier, and to have more formal education. Twenty-one percent of heritage travelers have a graduate degree, compared to 19% of average travelers. Twenty percent of heritage travelers

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<sup>8</sup> Travel Industry Association of America, 2003, <http://www.nasaa-arts.org/Research/Key-Topics/Creative-Economic-Development/Cultural-Visitor-Profile.php>

<sup>9</sup> The Historic/Cultural Traveler, 2003. Prepared by The Research Department of the Travel Industry Association of America, Washington, D.C.

are likely to be retired, compared with 16% of average travelers.<sup>10</sup> Thirty-four percent of heritage tourists in the US are age 55 or older.<sup>11</sup>

Sixty-two percent of heritage travelers lodge in a hotel, motel, or a bed and breakfast, compared to 55% for the average traveler.<sup>12</sup> Heritage travelers also tend to stay longer – an average of 5.2 nights compared to 3.4 nights for other leisure travelers.<sup>13</sup> Heritage travelers have more money to spend. The average heritage traveler earns \$50,000 for every \$48,000 earned by leisure travelers.<sup>14</sup>

### **How Much Do Heritage Tourists Spend?**

Heritage travelers spend an average of \$994 per trip nationally compared to \$611 per trip for leisure travelers.<sup>15</sup> This is a 38.5% difference in spending between the two groups. Nineteen percent of heritage travelers are likely to spend more than \$1,000 during their stay, compared to 12% of average travelers.<sup>16</sup>

The average spending for leisure travelers in Virginia from 2012 through 2014 was \$458 per trip.<sup>17</sup> National studies have found that heritage tourism constitutes 81% of general tourism.<sup>18</sup> Thus, heritage tourism is uniquely positioned to have a large impact on a regional or state economy. In Virginia, the percentage is likely to be higher than 81%, because of Virginia's many heritage attractions.

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<sup>10</sup> *Ibid.*

<sup>11</sup> *Ibid.*

<sup>12</sup> TNS data for Virginia Tourism Corporation, 2015 edition.

<sup>13</sup> *Ibid.*

<sup>14</sup> The Historic/Cultural Traveler, 2003. Prepared by The Research Department of the Travel Industry Association of America, Washington, D.C.

<sup>15</sup> U.S. Cultural and Heritage Tourism Study (October 2009) conducted by Mandala Research, LLC for U.S. Cultural & Heritage Tourism Marketing Council, U.S. Department of Commerce, and Gozaic/Heritage Travel Inc., a subsidiary of the National Trust for Historic Preservation.

<sup>16</sup> The Historic/Cultural Traveler, 2003. Prepared by The Research Department of the Travel Industry Association of America, Washington, D.C.

<sup>17</sup> TNS data for Virginia Tourism Corporation, 2015 edition.

<sup>18</sup> The Historic/Cultural Traveler, 2003. Prepared by The Research Department of the Travel Industry Association of America, Washington, D.C.



## **Report Structure**

Part 1 of this report defines and describes the volume of heritage tourism visitation in Virginia – the number of visitors who come annually to the Commonwealth to experience its built, natural and cultural heritage. It also describes the expenditures of heritage tourists, as well as the operational expenditures of heritage tourism sites. Taken together, the operational expenditures of heritage tourism sites and the expenditures of heritage tourists on lodging, fuel, food and other items, provide a relatively complete picture of the direct, quantitative effects of heritage tourism spending.

Part 2 provides a quantitative analysis of the impact of this spending on the economy of the Commonwealth of Virginia, derived by feeding the expenditures presented in Part 1 into our IMPLAN model. As this analysis shows, the dollar impact of this spending, as it ripples through the economy, is massive.

Part 3 consists of three case studies – Northern Virginia, Southwest Virginia, and the Eastern Shore – that describe how the organization of heritage tourism in these three regions helps to achieve the impressive economic impacts that are observed at the statewide level. Each case study also describes the social impacts of heritage tourism at the sub-state, regional level – what heritage tourism really means to the community. As that discussion shows, each region specializes in a different aspect of heritage tourism. In Northern Virginia, it is primarily the built environment – the buildings where famous people did and said important things, in Southwest Virginia, it is primarily the culture of country music and skilled crafts, and on the Eastern Shore, it is primarily natural beauty that draws heritage tourists. Each of the three regions, as well as the other regions of Virginia, contributes in its own way to the rich tapestry that is heritage tourism in Virginia. And as the data and case studies show, heritage tourism provides considerable benefit to the state, regional, and local economies of the Commonwealth.





## 1. Heritage Tourism and Spending in Virginia

This part of the report describes heritage tourism visitors and their spending patterns. It also describes the expenditures of heritage tourism sites that heritage tourists visit. Together, they constitute total heritage tourism-related spending in Virginia. The tables in this part show the average for the specified figures over a three-year period, from 2012-2014.

### Heritage Tourism Visitation in Virginia

Heritage Tourism in Virginia consists of domestic and international travelers. However, domestic travel makes up the overwhelming majority of Virginia's visitors. Most of these visitors are from out-of-state.

**Origin of Domestic Travelers:** While Virginia residents make up the largest single group of domestic visitors (29%), an average of 71% of leisure travelers who come to Virginia are from out-of-state. Unsurprisingly, the states with the highest contribution to Virginia's heritage tourism visitation<sup>19</sup> are those that are nearby. North Carolina sends the highest number of travelers, an average of 10% of Virginia's annual tourism, or 7.7 million visitations. Pennsylvania and Maryland each comprise 7% of Virginia's average annual tourism visitation, resulting in 1.86 million visitations from each. Finally, Florida and New York constitute an average of 5% of the visitors to Virginia annually – 1.3 million visitations. (See Figure 1.)

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<sup>19</sup> Virginia experiences an estimated 42,500,000 *visitations* for heritage tourism annually. The term visitation is equivalent to person-trip. Person-trip is the most basic and universal measure of personal travel: it expresses the number of visitors multiplied by the number of trips in a certain year. If a household of 3 people takes 2 trips in a year, they will count as 6 in the person-trips system. The number 42,500,000 was derived using data from TNS, a market research firm, as a basis for our estimate. TNS data do not include travelers visiting Washington DC (who often cross the Potomac River to visit sites in Northern Virginia) or who are traveling on business. Additionally, TNS methodology uses a trip multiplier that reduces the number of trips counted after a person goes to three sites.

These factors led us to adjust the TNS numbers. Specifically, since heritage travel makes up 81% of the general tourism travel in the US on average, and since, according to The Historic/Cultural Traveler, 2003 Virginia is ranked the sixth most-visited state for heritage tourism, we conservatively estimated Virginia's heritage tourism travel to be 85% of general tourism. We did this by first finding visitation numbers for the fourth ranked state, Florida, and the ninth ranked state, North Carolina (we could not find similar data for Virginia). We chose an estimated number of visitations between those of North Carolina and Florida, to reflect Virginia's position between them on tourism rankings.

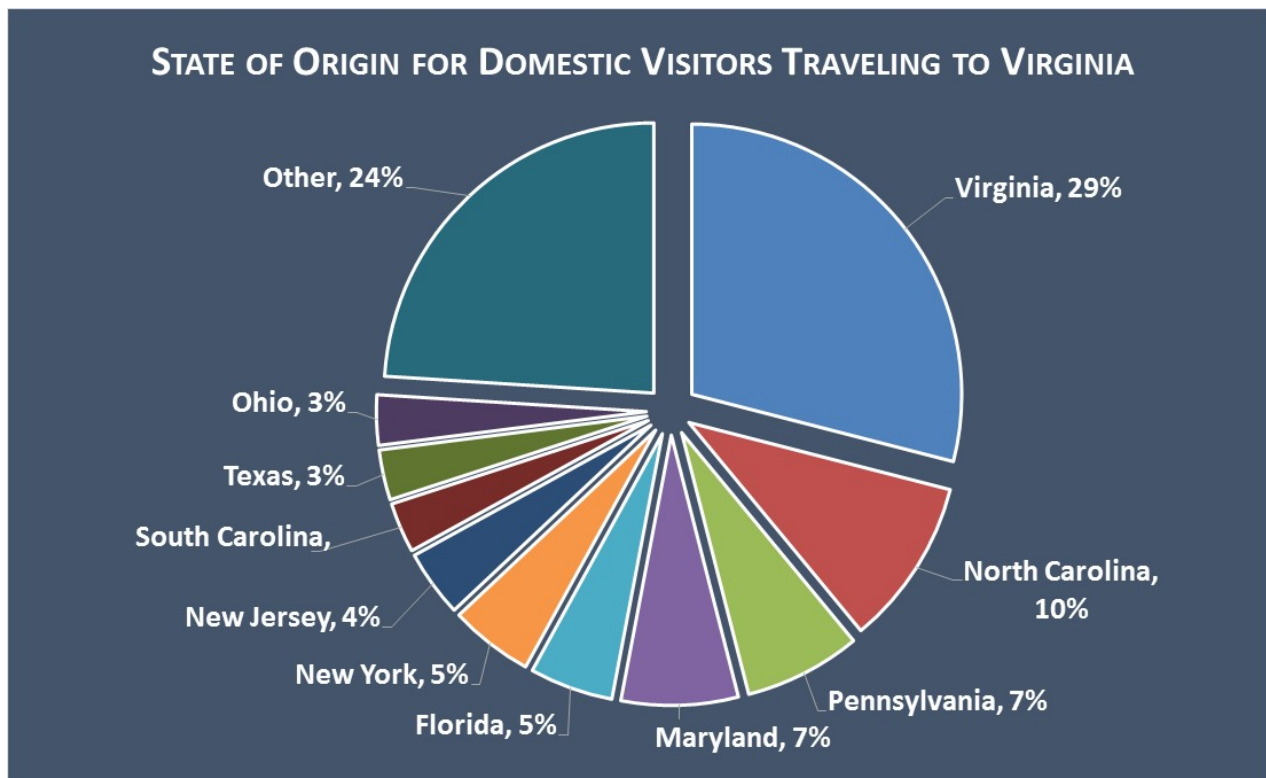


Figure 1 - State of Origin for Domestic Visitors Traveling to Virginia, average 2012-2014  
Source: VTC on TNS data, 2015

**Origin and Number of International Visitors** - Virginia also enjoys a significant number of visitors from overseas. Figure 2 shows overseas travelers by region and their percentage contribution to overall international visitation in 2012. The three countries with the highest number of visitors to Virginia were the United Kingdom with 68,000 visitors, Germany with 39,000 visitors and China with 22,000 (Capital Region U.S.A. 2012). There were 387,000 international travelers in 2012, a 7% increase over the previous year (Capital Region U.S.A. 2012). This increase amounted to an additional 25,000 visitors to Virginia.

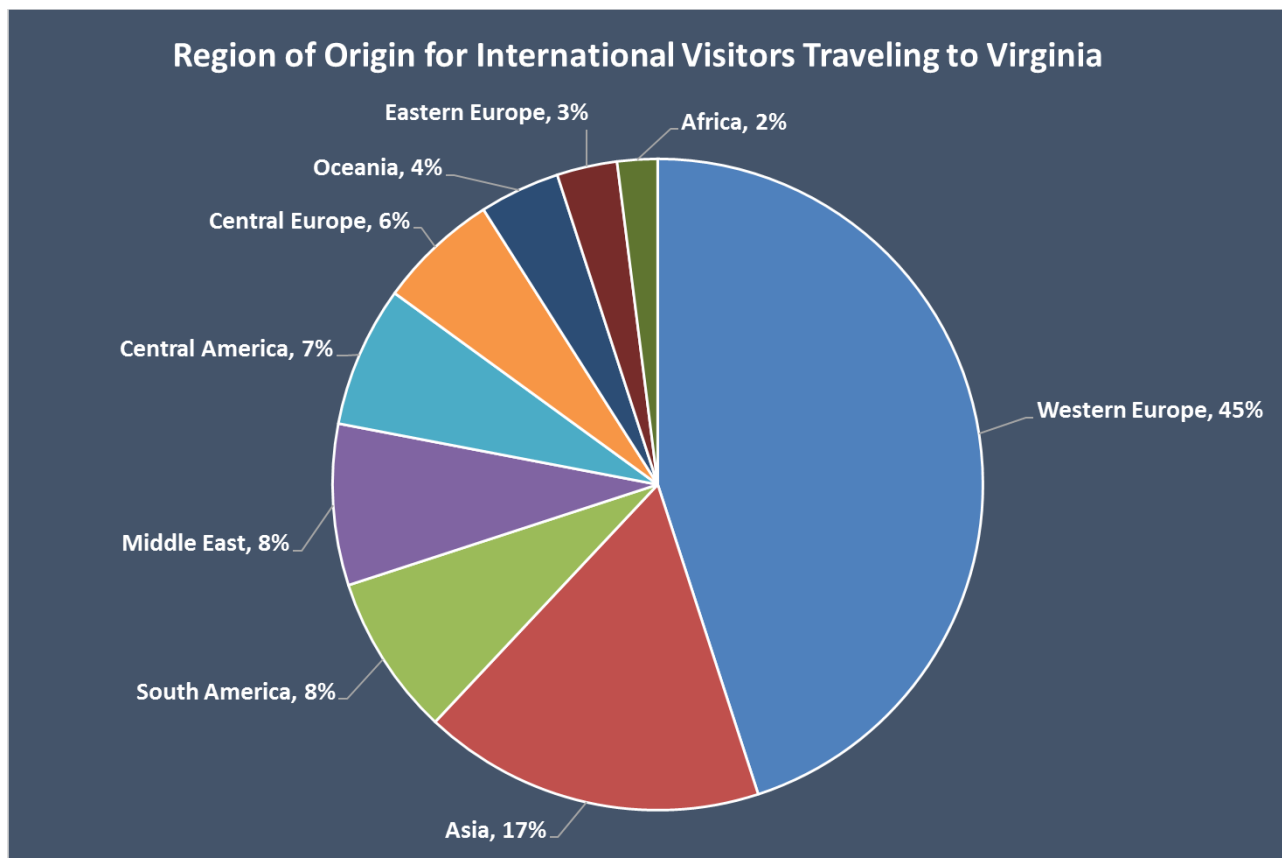


Figure 2 - Region of Origin for International Visitors to Virginia, 2012  
Source: CRUSA 2012 (excludes Mexico).

**The Number of Domestic and Overseas Visitations to Virginia** – Estimating the number of visitors at each site is essential to analyzing heritage tourism. Visitation is the number against which all other consumer spending metrics are multiplied in order to determine spending patterns and how they affect the economy of Virginia. For this reason, visitation and visitor spending are integral components of the economic impact generated by the heritage tourism industry. Visitation data are provided by TNS, a firm that conducts surveys and reports results to the Virginia Tourism Corporation (VTC). TNS data are included in the Appendix. TNS uses the term “person trips” to describe trips per household of more than 50 miles from home. In this report, we use the concept of “visitation” to describe and count these trips. Visitation data was then further refined using additional data from other heritage tourism studies, which consistently show Virginia ranking among the top ten states for heritage tourism in the country.<sup>20</sup>

<sup>20</sup> See *The Historic/Cultural Traveler*, 2003. Prepared by The Research Department of the Travel Industry Association of America, Washington, D.C. and Texas Historical Commission, *Heritage Tourism Guidebook*, 2007 for ranking of top ten states; Center for Government Responsibility, University of Florida, and Rutgers, *Economic Impacts of Historic Preservation in Florida, Update 2010*, for Florida visitation numbers; and *Visit North Carolina, FAST FACTS - 2004*

Table 1 shows visitation for domestic leisure travel in Virginia in 2012. Every year, on average, 50 million person-trips are taken to Virginia tourist sites. About 85% of these visits include some form of heritage tourism activity. Of these, 84% include one or more nights spent in Virginia, while only 16% are day-trips. In addition, Virginia received about 387,000 visitations in 2012.

<b>Table 1. Annual Domestic and International Visitation<sup>1</sup> to Heritage Tourism Sites in Virginia</b>	
<b>Domestic Visitation</b>	
Estimated Annual Visitation to Virginia <sup>2</sup>	50,000,000
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<b>International Visitors</b>	
	387,000
<b>Total Annual Visitation to Virginia Heritage Sites</b>	<b>42,887,000</b>

**Sources :** TNS Survey Results provided by Virginia Tourism Corporation; Crusa 2012; Travel Industry Association of America TravelScope survey, 2004.

<sup>1</sup> Includes Virginia residents visiting Virginia tourist sites. Domestic visitation estimate is based on person-trips (number of visitors multiplied by the number of trips in a certain year), while international visitors data express simply the number of international travelers entering Virginia in a certain year.

<sup>2</sup> This estimate was obtained by combining TNS Survey results with other national sources on heritage tourism that consistently rank Virginia among the top states in the Country for number of visitors. The estimate was then vetted by experts in the field of Tourism research.

### **Visitor Expenditures in Virginia**

Visitor expenditures refer to the money travelers spend while traveling in Virginia. In addition to vacation spending, visitor expenditures include money spent on items that are not specifically vacation-related as well, such as groceries or gas. These expenses are part of the overall spending that contributes to the state, regional and local economy. TNS divides spending into the categories listed in Table 2 below, which shows the average spending by category by household. The average expenses in each industry are added up to form the average amount spent on all expenses by household per trip. Day-trip spending does not include lodging, so it is excluded from day-trip calculations.

There are two types of heritage tourists, those who stay overnight and those who do not. TNS defines overnight travelers as those who stay at least one night in the state; these travelers typically spend more on travel than day-trip travelers, due to lodging expenses. (See Table 2.) They are typically from outside of the region or state, and the largest percent of their

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*Economic Impact of Tourism*, for North Carolina visitation numbers. Florida and North Carolina visitation numbers were used as a reference to gauge Virginia visitation number range.

expenditures are for lodging. For this reason, it is important to distinguish between overnight travelers and day-trip travelers. Money spent at hotels and motels counts toward the overall economic impact in Virginia; calculating it by the number of people who stay overnight vs. overall travelers provides a more accurate expenditure result. Lodging information is provided in Table 2 below. Lodging is not counted for day-trip travelers, since by definition the day-trip traveler does not stay overnight and does not require lodging. The day-trip spending is also provided in Table 2.

Overnight and day-trip visitors are further separated into out-of-state and in-state travelers to determine the amount of spending in each segment. This division enables us to determine the economic impact of out-of-state travelers to Virginia. This is important because we can then see how much of the money Virginia is retaining through its in-state heritage tourists, and how much money it receives through tourists from other states. Attracting heritage tourists to come to Virginia and spend money here means they are choosing Virginia over another state or over staying in their home state.

<b>Table 2. Average Visitation Spending in Virginia by Category for all Travelers</b>			
<b>Spending Category</b>	<b>Average Spending (%)</b>	<b>Average Spending by US Household (Constant 2015 Dollars)</b>	<b>Average Spending by International Travelers (Constant 2015 Dollars)</b>
Lodging (overnight travelers only)	26%	\$118.21	\$294.84
Transportation - excluding parking & tolls	20%	\$89.84	\$226.80
Transportation - parking & tolls	2%	\$7.67	\$22.68
Gasoline	12%	\$56.54	\$136.08
Food (excl. groceries)	19%	\$86.71	\$215.46
Food (groceries)	5%	\$23.43	\$56.70
Entertainment (excl. gaming)/Admission	5%	\$24.82	\$56.70
Entertainment (gaming)	1%	\$4.18	\$11.34
Shopping (gifts, souvenirs)	7%	\$32.66	\$79.38
Amenities (golf fees, spa, health club, ski passes, etc.)	1%	\$4.67	\$11.34
Other	2%	\$9.16	\$22.68
<b>Average Spending by household for overnight visitation</b>			<b>\$458.47</b>
<b>Average Spending by household for day-trip visitation (exclude lodging)</b>			<b>\$340.11</b>
<b>Average Spending per person by International Travelers</b>			<b>\$1,134</b>

**Source:** TNS Survey Results provided by Virginia Tourism Corporation; CRUSA, 2012



Heritage tourism is an important driver of Virginia’s economy. Tourists who come to Virginia buy goods and services, such as food, lodging, gasoline and gifts. On average, tourists who stay overnight spend \$458 per household per trip, while day-trip tourists spend about \$340. International travelers spend approximately \$1,134 per person. Collectively, heritage tourists spend almost \$7.7 billion each year in Virginia (see table 3).



**Table 3. Total Annual Expenditures of Domestic and International Heritage Travelers to Virginia**

*(Constant 2015 Dollars)*

Annual Expenditures of Domestic Overnight Heritage Travelers	\$6,343,950,609
Annual Expenditures of Domestic Daytrip Heritage Travelers	\$896,415,397
Annual Expenditures of International Heritage Travelers	\$438,775,960
<b>Total Annual Expenditures of All Heritage Travelers</b>	<b>\$7,679,141,967</b>

*Source* : TNS Survey Results provided by Virginia Tourism Corporation; CRUSA, 2012

### **Operational Expenditures of Heritage Tourism Sites in Virginia**

In addition to money spent by heritage tourists to buy goods and services in Virginia businesses, this study considers the operational expenditures of heritage sites as an additional source of

economic impact that can be credited to heritage tourism. Operational expenditures are the money spent by heritage tourism sites to keep the operation in business. This includes employment expenses such as payroll and employee benefits. Other expenses incurred by these facilities are overhead expenses such as rent, utilities, and maintenance of the site. They also include supplies and related expenditures. As long as the money spent remains in Virginia, it is included in this study. CURA obtained this information by asking the directors of facilities in Virginia to complete a survey on operational expenses, while additional information was obtained through their federal tax form 990.<sup>21</sup>

With the assistance of field experts, we analyzed standard museum budgets and formulated spending patterns/categories to be used in the IMPLAN model, to estimate the economic impact of heritage tourism sites operations. We estimate these expenditures, conservatively, to be at least \$430 million per year.

## **2. Measuring the Economic Impact of Heritage Tourism on the Commonwealth of Virginia**

The expenditures discussed in the previous section – by tourists and by heritage tourism sites – are only the direct effects on the Virginia economy; the tip of the iceberg, so to speak. But the total economic and fiscal impacts on the Virginia economy are much greater. Here we present those impacts.

The economy of a region, state or nation can be likened to the nerve network of the human body – the entire network is connected in a very specific pattern. In an economy, this network consists of the industries that buy from other industries and which make products or services that are sold to yet other industries, or to final consumers. When one industry increases production, it sends an impulse that is felt in other parts of the network – it purchases goods or services from other industries. Economic impact models have information on how the network of industries is structured, so the effect of an increase in production in one industry can be estimated throughout the economy.

### **Quantitative Analysis**

To estimate the impact of visitor expenditures on the Virginia economy, we used IMPLAN Pro™ software to prepare and customize an economic model for the Commonwealth. IMPLAN is a regional input-output computer modeling system used by economists to estimate the effects of

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<sup>21</sup> A list of the sites, provided by Preservation Virginia, can be found in Appendix 3. This list does not intend to represent the entirety of heritage tourism sites in Virginia.

spending and policy actions. We used IMPLAN Pro™ to estimate the economic effects that take place as goods and services are purchased in connection with expenditures related to heritage tourism in Virginia. We used data on expenditures provided by TNS and the Virginia Tourism Corporation (VTC), which is collected monthly.

Since the geographic area used for this analysis is the Commonwealth of Virginia, only the money spent at sites and businesses in the state generates economic activity for that region and therefore has an impact on the state's economy. Purchases that are made at establishments outside of the study area, as well as the cost of goods sold that are not produced in the state, have no impact on the state economy and therefore are not counted in the calculations of the state impact. This spending literally "leaks out" to other geographic areas. In general, the smaller the geographic/economic area that is analyzed, the greater is the leakage of spending outside its borders and the lower is the impact of the activity being studied.

The IMPLAN model divides economic activity into three components, direct, indirect, and induced effects, and then sums them to derive a total economic impact (See Table 4).

Table 4 - Definitions of IMPLAN Impact Terms	
Impact Term	Definitions
<i>Direct Impact</i>	The initial expenditures, or production, made by the industry experiencing the economic change
<i>Indirect Impact</i>	The effects on local inter-industry spending through backward linkages (which track industry purchases backward through the supply chain)
<i>Induced Impact</i>	The results of local spending of employee wages and salaries for both employees of the Directly affected industry, and the employees of the Indirectly affected industries

*Source : Frances Day - "Principles of Impact Analysis & IMPLAN Applications"*

**Direct effects** are expenditures made in relation to heritage tourism. This initial spending causes ripple effects (also known as "multiplier effects") within the study area. These additional effects are called indirect and induced impacts.

**Indirect effects** are "supplier" effects. Businesses (such as professional services) that receive money from the original purchases must also buy additional goods and services to accommodate the new demand. As purchases are made from other firms, the economy is stimulated further.

**Induced effects** are generated by changes in household expenditures. When companies receive more business because of the direct and indirect effects, they meet the new demand by hiring additional workers or paying existing employees to work longer hours. As a result, these

employees will have more money to spend on the goods and services that they buy within the study area.

The direct, indirect and induced effects are estimated for labor income, value added, economic impact, and employment impact. These components are defined below:

- **Labor Income:** the wages and salaries paid to local employees of firms, along with an estimate of the value of benefits earned by these workers. Labor income also includes payments received as income by freelance employees.
- **Value Added:** in addition to labor income, value added includes income from rents, dividends, profits, royalties, interest, and indirect business taxes paid by companies. Value added is the contribution of this economic activity to the regional Gross Domestic Product (GDP) – defined as the value of all final goods and services produced within the borders of a state.
- **Economic impact:** the overall economic effects on the region, which can be viewed as the total (additional) output generated by heritage tourism and which is equal to the value added plus intermediate expenditures. Another way to look at it is to consider the economic impact as the value of change in sales or the value of change in production.
- **Employment:** the number of total jobs in the study area, including both full-time and part-time employees, supported by the new economic activity.

In calculating the impact of heritage tourism on the Virginia economy, we looked at visitor spending, visitation, and operational expenditures of several heritage tourism sites in Virginia. These are what form the direct economic impact on the state. Visitation and visitor spending make up the visitor expenditures while the heritage tourism site spends money operationally on activities that support tourism. All of these metrics combine to form the ripple effect throughout the region described above.

### **Estimated Impact of Heritage Tourism-Associated Spending in Virginia**

The \$7.7 billion spent by heritage tourists, plus more than \$430 million spent by heritage tourism sites for operational expenditures (a conservative estimate), ripple throughout the economy, giving a boost of \$6.5 billion to the economy and generating \$1.3 billion in taxes (see table 5). This is net of leakage of spending outside Virginia as goods and services suppliers make purchases from non-Virginia sources. Thus, every year, the total impact of heritage tourism spending comes to:

- \$6.5 billion of additional economic activity, including more than \$3.3 billion in employee paychecks for all affected industries (not just tourism).

- More than 105,000 jobs supported by the direct and indirect impacts of heritage tourism spending in Virginia.
- More than \$640 million in State and local taxes, and more than \$700 million in Federal taxes.

**Table 5. Estimated Impacts on the Commonwealth of Virginia from Heritage Tourism Associated Expenditures**

<b>Economic Impact</b>	<b>Labor Income</b>	<b>Employment Impact</b> <i>(number of jobs)</i>	<b>Tax Impact</b> <i>State and local</i>	<b>Tax Impact</b> <i>Federal</i>
<b>\$6,478,554,794</b>	<b>\$3,356,576,565</b>	<b>105,373</b>	<b>\$640,529,476</b>	<b>\$709,371,990</b>

*Source:* Estimates developed on TNS, CRUSA and CURA Survey data by the Center for Urban and Regional Analysis at VCU, using IMPLANPro™. Inflation adjustments made using the U.S. Bureau of Labor Statistics' "Consumer Price Index for All Urban Consumers".

*Note:* All dollar values are in 2015 Dollars

Looking at the different “sources” of impacts, Table 6 shows that more than half of the impact – in terms of output – is generated by the direct demand of tourism spending, while another \$2 billion is generated by the induced impact, which is the spending of those employees working *directly* or *indirectly* in the tourism industry. In terms of employment, the direct effect is much more significant, with almost 80% of employment being generated by direct demand, probably because of the labor-intensive nature of the tourism and tourism-related or associated industries.





**Table 6. Estimated Impacts on the Commonwealth of Virginia from Heritage Tourism Associated Expenditures\***

	<b>Direct</b>	<b>Indirect</b>	<b>Induced</b>	<b>Total</b>
<b>Labor income</b>	\$2,259,608,915	\$409,846,868	\$687,120,782	\$3,356,576,565
<b>Value added</b>	\$2,969,876,284	\$667,703,039	\$1,224,011,743	\$4,861,591,066
<b>Economic Impact</b>	\$3,476,285,420	\$1,066,458,341	\$1,935,811,034	<b><u>\$6,478,554,794</u></b>
<b>Employment Impact</b> <i>(number of jobs)</i>	82,217	7,462	15,694	<b><u>105,373</u></b>
<b>Tax Impact</b> <i>State and local</i>				<b><u>\$640,529,476</u></b>
<b>Tax Impact</b> <i>Federal</i>				<b><u>\$709,371,990</u></b>

*Source:* Estimates developed on TNS, CRUSA and CURA Survey data by the Center for Urban and Regional Analysis at VCU, using IMPLANPro™. Inflation adjustments made using the U.S. Bureau of Labor Statistics' "Consumer Price Index for All Urban Consumers".

*Note:* All dollar values are in 2015 Dollars

\* Expenditures include visitor spending and expenditures (including payroll) of almost 300 heritage tourism sites in Virginia

Table 7 shows major industries that experience the impacts of heritage tourism. These include Food Services (more than \$1.4 billion in economic activity and more than 25,000 jobs supported), Transportation (over \$1 billion and almost 22,000 jobs), and Trade – both wholesale and retail (almost \$700 million in economic activity and over 33,000 supported jobs).

**Table 7. Estimated Economic and Employment Impact on the Commonwealth of Virginia from Heritage Tourism Associated Expenditures, by Major Industry Sector**

Classification by output <i>(Constant 2015 Dollars)</i>			Classification by employment <i>(Number of Jobs)</i>		
Industry	Total Economic Impact	Percent of Total Impact	Industry	Total Employment	Percent of Total Employment
Food Services	\$1,463,454,692	23%	Trade (wholesale and retail)	33,421	32%
Transportation	\$1,065,834,673	16%	Food Services	25,695	24%
Trade (wholesale and retail)	\$698,651,971	11%	Transportation	21,933	21%
Real estate	\$523,372,414	8%	Entertainment	5,609	5%
Professional Services	\$529,880,973	8%	Professional Services	4,656	4%
All Other Industries	\$2,197,360,070	34%	All Other Industries	14,059	13%
<b>Total</b>	<b>\$6,478,554,794</b>	<b>100%</b>	<b>Total</b>	<b>105,373</b>	<b>100%</b>

Source: Estimates developed on TNS, CRUSA and CURA Survey data by the Center for Urban and Regional Analysis at VCU, using IMPLANProTM. Inflation adjustments made using the U.S. Bureau of Labor Statistics' "Consumer Price Index for All Urban Consumers".

Clearly, heritage tourism is a major force in the Virginia economy. To understand how it achieves its tremendous impact – how it is organized – and what heritage tourism means at the community level, we turn next to case studies of heritage tourism in three Virginia regions.



### **3. Case Studies – Heritage Tourism in Three Virginia Regions**

This section provides insight into the operation and impacts of heritage tourism in three regions of Virginia – Northern Virginia, Southwest Virginia, and the Eastern Shore. Regions, as opposed to single sites or localities were chosen to emphasize, but also to determine, the regional nature of heritage tourism visitation and organization. Heritage travelers typically visit more than a single site or locality and the three case studies presented here attempt to capture that.

We studied three very diverse regions, where economic conditions, as well as the basis of heritage tourism, are different. Northern Virginia (Alexandria, Fairfax and Loudoun) is known especially for its historic buildings and estates and for the famous events that took place there. Southwest Virginia is known largely for its culture of country music and its arts & crafts traditions. The Eastern Shore is famous for its stunning natural beauty.

In each community, we conducted three focus groups, with (i) heritage tourism site directors, (ii) local government and other public sector officials, and (iii) businesses, residents, advocates and other stakeholders during the spring of 2016. Preservation Virginia recruited the participants and organized the sessions. A total of 36 persons participated. No remuneration was offered to the participants.

Each discussion lasted 60-90 minutes. Although the discussion themes in the groups were similar, participants were asked to describe their own tourism-related work and experiences. Each case study is therefore somewhat unique, as it follows the story of heritage tourism in that specific region. The focus group protocols are included in Appendix 5. During the discussions, one member of the research team took detailed, nearly verbatim notes, while the other posed the questions. No discussions were recorded electronically. Immediately following each discussion, the leader and note-taker went over the notes for up to one hour, filling in gaps and clarifying comments, so that the resulting record is very accurate. All participants were promised anonymity in our reporting of their comments.

In addition to the focus groups, in each region we studied reports and other documents produced by heritage tourism organizations, reports and plans completed by local and state government, books, and promotional materials. And although we were already quite familiar with each of the regions, we visited numerous heritage tourism sites to refresh our knowledge of them.

## **Northern Virginia is for History Lovers**

Northern Virginia can perhaps lay claim to having all three of the elements that constitute place-based heritage and which form the basis of a tourist destination – natural, built, and cultural. But the one that draws visitors the most is the built environment – the iconic structures, especially in Alexandria, and the famous persons who said or did memorable things in them. Captain John Smith first viewed the area in 1608 and today the town boasts a dense concentration of historic structures dating from the 18<sup>th</sup>, 19<sup>th</sup> and 20<sup>th</sup> centuries. This built environment and the community's proximity to Washington, DC, make it a magnet for heritage tourists.

Formal historic preservation efforts began in 1932 with the restoration of Gadsby's Tavern, which served George Washington, the Marquis de Lafayette, and Thomas Jefferson. Since then, Alexandria's organizations and individuals have developed a sophisticated heritage tourism promotion system, which is integrated with local government and increasingly with heritage tourism organizations throughout the region. Alexandria is acknowledged to be a national model of heritage tourism promotion.

Elsewhere in Northern Virginia – specifically Fairfax and Loudoun Counties, which host sites whose directors were interviewed in this research – there are ample historic structures, landscapes and sites (e.g., Civil War battlefields) that constitute part of the region's wealth of heritage tourism assets. Fairfax County alone has over 40 history-related sites. These assets are also represented and promoted by a variety of non-profit and government-related organizations, typically headed by small, but knowledgeable staffs.

Alexandria and Northern Virginia's heritage tourism professionals and volunteers do not limit their focus to preserving and interpreting the region's historic buildings and battlegrounds. They display a keen understanding of the 21<sup>st</sup> century heritage tourism market and the importance of providing memorable experiences for visitors. This means combining history with other activities and partnering with a variety of organizations to create a holistic experience.

But heritage in Alexandria goes deeper even than telling the story to tourists. Here, heritage is community identity. As one interviewee put it:

*The sense of community is so strong in Alexandria. ... For such a small city, we have numerous commissions and committees. A highly educated population and they are highly engaged. They care. The historic sites help us understand each other and the complexity of our history, how it brings us together and how we are connected. It feeds the passion for and appreciation of our history.*

*It's a social thing to be a part of the history groups in town. Civic-minded, history-loving people come together; they've been helping to support history projects [in Alexandria] since 1932.*



### **Heritage Tourism Assets**

There are at least two-dozen significant historic sites within the City of Alexandria plus scores of sites in Fairfax and Loudoun counties. Here we mention only a few illustrative examples.

Old Town Alexandria features stately Colonial era structures, such as the *Carlyle House*, a center of political and military life since shortly after its completion in 1753; the aforementioned *Gadsby's Tavern and Hotel*, completed in 1785 and 1792 respectively; the *Lyceum*, Alexandria's history museum; the *Lee-Fendall House Museum and Garden*; and the aforementioned *Stabler-Leadbeater Apothecary*, first established in 1775, now a museum. Nearby are the *Alexandria Black History Museum*; the *Delray Art Deco District*; and the *Fort Ward (Civil War-era) Museum and Historic Site*.



Historically significant sites in Fairfax and Loudoun Counties include George Washington's *Mount Vernon*, built in 1735; nearby *Woodlawn Plantation*, which is also home to Frank Lloyd Wright's *Pope-Leighy House*; *Gunston Hall Plantation* (1759) in Lorton; and *Morven Park* in Leesburg, which features historic *Westmoreland Davis Mansion* (1780), the *Museum of Hounds and Hunting*, and Civil War and Native American archeological sites.

An enjoyable way to access many of the region's heritage sites is by car along the *George Washington Memorial Parkway*, which extends along the Potomac River from Maryland (near Great Falls) through Washington, DC, Alexandria, and Fairfax County to Mount Vernon.

### **Old Town Alexandria Art Venues and Thematic Restaurants**

Alexandria's historic buildings and neighborhoods are complemented by other uses, many with historic themes that help to create a complete cultural experience for visitors. A sample of these attractions includes the *Athenaeum* (1852), a Greek Revival style building that houses the museum of fine arts; the *Little Theater of Alexandria*, founded in 1934 and known for its one-act playwriting competition; *Medieval Madness at John Strongbow's Tavern*, which features 15<sup>th</sup> century-inspired décor and menu, as well as live entertainment with swordfights; *Metro Stage*, an award-winning theater; *Patricia Palermino Studio*, a folk art gallery featuring Old Town Alexandria sites and activities; and *The Torpedo Factory Art Center*, built in 1918 as a naval munitions factory on the waterfront, and since 1974 an art center, now reputedly with the largest number of publicly accessible working artist studios in the U.S.

### **Heritage Tourism Promotion Organizations**

In addition to the organizations that manage the assets mentioned above, several organizations exist specifically to promote the area's cultural heritage, managing individual sites, and working through collaborative partnerships to create thematic cultural experiences, such as the War of 1812 Commemoration or Civil War Hospitals Walking Tour.

These include the *Alexandria Convention & Visitors Association*, a member-based organization that promotes the community's events and attractions; *Historic Alexandria Foundation*, incorporated in 1954 to preserve, protect and restore structures of historic and architectural significance through research and advocacy; the *Office of Historic Alexandria*, a local government agency that promotes the city's history through public programs, the management of various sites and the oversight of various coordinating programs; *Visit Alexandria*, the city's official tourism promotion and event coordination organization at Alexandria's historic sites; the *National Trust for Historic Preservation*, which manages various assets in the area, including the Woodlawn Plantation and Pope Leighey House in Fairfax County; *Northern Virginia Regional Park Authority*, which manages 32 parks, many of which have historic assets, such as Carlyle House in

Alexandria and Morven Park in Leesburg; and *Visit Loudoun*, which promotes the county's cultural and historic assets, and helps meeting planners, sports and event organizers, domestic and international tour and travel planners and visitors through planning assistance, itineraries and brochures.

### **Historic Preservation & Advocacy Organizations**

Volunteers who staff Northern Virginia's many historic sites and who advocate for the preservation and sensitive reuse of historic assets constitute an essential component of the cultural heritage infrastructure. The outstanding quality of life that the region's wealth of historic assets has helped to create has also attracted population, businesses, and concomitant development pressures. The region's ardent historic preservationists help to ensure that development and preservation work together to maintain the community's high quality of life.

Volunteer advocates also help to raise consciousness about parts of the community's history that have previously not been celebrated, such as the history of African-American neighborhoods, and they help to address new issues, such as the preservation of the remains of an 18<sup>th</sup> century ship discovered recently in the Alexandria harbor. The following small sample gives an idea of Alexandria's many kinds of historic preservation organizations.

The *Alexandria Archaeological Commission* is appointed by City Council to establish goals and priorities for the City and acquires, preserves, and displays all the artifacts found in the city. The *Old and Historic Alexandria District Board of Architectural Review* is appointed by City Council to regulate development in the city's historic district. *Friends of the Alexandria Waterfront*, a citizens' group, advocates for the preservation of Alexandria's historic waterfront in the face of development pressures. The *Friends of Freedmen's Cemetery* is a citizen-based organization founded in 1997 to preserve, commemorate and research this Civil War-era African-American burying ground in Old Town Alexandria. The *Historic Alexandria Resources Commission*, whose members are appointed by City Council, advises the City in the preservation of historic sites and buildings, artifacts, and records from loss or deterioration, and promotes citizen and tourist use of historic sites and the Torpedo Factory Art Center.

### **Local Government Engagement**

As the foregoing list indicates, preservation and heritage tourism organizations are integrated into local government decision-making. The Office of Historic Alexandria is a part of local government. It is funded partly by local government and partly by grant funds that it raises on its own. The Office has a seat at the table when local planning and development issues are addressed.

Equally important, the many advocacy organizations that seek to influence local policy and the commissions established to ensure that preservation issues are considered show that historic preservation is part of the community's DNA. As a result, the historic fabric often takes precedence in community development decisions.

*The Historic Alexandria Resource Commission makes recommendations to city council. No city museums are represented, but a city staff person presents on behalf of them. ... This is where you get the history community together once a month; they are the voice that goes to city council. This is an organized process, how things are done in Alexandria. In total, four history-related commissions have the ear of city council.*

*The way the city manager works – the Office of Historic Alexandria and Visit Alexandria are at the table with planning, zoning, etc. All make recommendations about how to deal with the financial realities and what the priorities are based on the city's economic development goals. If [the budgets of] historic sites are already stretched thin, they can advocate that their funding not be cut any more.*

*It's a very desirable community to live in with the history and buildings. Regulations in town guide new construction and redevelopment - buildings like Gadsby's are the benchmark. I think this is seen as a good. Some people come into the community and find out the hard way about these rules, but it definitely makes it a more desirable community.*

### **Consortia & Regional Partnerships**

Consortia and partnerships form frequently and are effective. They are "horizontal" relationships formed voluntarily as individual site managers and single-purpose organizations and their constituencies realize that they can be more effective and use resources more efficiently by combining their marketing and programming efforts.

*I sit on the boards of a lot of organizations, such as the Historic House Museum Consortium – the house museums of Washington, DC, Southern Maryland and Northern Virginia as far out as Loudoun and Prince William counties. We have four meetings a year. Also, the Virginia Association of Museums helps all of our museums communicate, especially for training opportunities.*

*What's discussed at these regional meetings? It's everything from advocacy for funding, to grant opportunities, to marketing initiatives. Marketing opportunities is key. It's joint marketing. We will place an ad in the Washington Post Arts section. We coordinate efforts. ... In the commemorative events, such as World War I (which is coming up), the*

*Civil War sesquicentennial, the War of 1812, etc., the public can see the theme in other places, [so we want] to make the stories specific to sites in Alexandria as part of the larger theme.*

*Mount Vernon is a traditional collaboration [with Alexandria historic sites and organizations]. ...*

*The Pope Leighey House [designed by Frank Lloyd Wright] has interaction with national and international groups like the American Institute of Architects. ...*

*[We're] partnering with the Potomac Heritage Trail, which is being extended through the Woodlawn historic district and includes Fort Belvoir. We want to interpret what's around people on the trail. And we have a partnership with an arts organization that may do an installation there.*

*The Office of Historic Alexandria also helps the sites in the area work well together. ... The Attics and Alleys tour includes Office of Historic Alexandria sites, as well as Carlyle House; it's administered by Historic Alexandria. We have the same type of collaboration for the candle light tours. The Office of Historic Alexandria sells the tickets, then divides up the proceeds. If large groups show up at our site, we call the Office of Historic Alexandria and send people to their sites like Gadsby's, or Alexandria Archeology. We are all friends and we play nice with each other.*

Other collaborative partnerships include *Capital Region USA*, which promotes Northern Virginia, Maryland and Washington, DC; the *Historic House Museum Consortium* of Northern Virginia, Southern Maryland and Washington, DC; the *Northern Virginia Visitors Consortium*, which promotes Northern Virginia to non-local tourists, such as Canada; the *Loudoun Heritage Consortium*; and the *Virginia Association of Museums*, a statewide consortium.

### **Trails, Walking Tours and Packages**

Alexandria and the Northern Virginia region feature many trails and walking tours. Here is a small sample:

The *African American Sites & Neighborhoods Guide*; the *Alexandria Civil War Hospitals Walking Tour*; *America's Civil Defenses of Washington* (a Civil War walking tour); *Virginia Civil War Trails*; the *Alexandria War of 1812 Commemoration Walking Tour*; *"The Fort" Heritage Trail*; and *Presidents Passport* – a heritage tourism package including the homes of Presidents Jefferson, Madison, Washington and Monroe.



### **Special Programs & Initiatives**

Special programs are becoming an increasingly important aspect of heritage tourism in Northern Virginia as the community responds to the public's growing interest in "experience tourism." Focus-group participants described some of the better-known special programs:

#### **War of 1812 Commemoration Program**

*The War of 1812 commemoration program is an example of an umbrella project. It aligned everyone's public program with monthly meetings, each site contributed smaller programs, promotional materials were all aligned, a logo, culminated in program for signature weekend, with festival and different events all related to that central theme. There was no doubt in the visitor's mind that they were celebrating the War of 1812. It was a yearlong commemoration.*

## Mercy Street

Mercy Street is a PBS drama inspired by stories of Civil War Alexandria. It is an excellent example of valuable assets being noticed by national entities, and also an example of how locals have built upon this success to develop further programming.

*The Convention and Visitors Bureau spearheaded the local effort. We all came up with a public program to fit into the umbrella program. The Visitor's Bureau vision included sites plus the businesses and restaurants of the area - a higher dollar initiative. They added hotel incentives and such. It was a bigger push; they have more resources than Historic Alexandria alone. Financial resources also helped them with the 1812 program, also with ads and published materials. ... Thank goodness we have Mercy Street to help drive popular visitation.*

Other special programs include *Save Our Ship: Nautical Discoveries at South Union Street*; the *George Washington Birthday Night Ball*; and the upcoming *World War I Commemoration*.

## **Visitor Demographics**

Alexandria and other Northern Virginia heritage tourism directors have a keen understanding of their visitors, when they come and why they come.

*High season for Alexandria tourism is spring, around cherry blossom time. ... When Congress is in session, there's a lot of visitation. The fall is busy therefore. Holidays are strong, with special events and candlelight tours. November to the first of the year, it's pretty strong. The winter shoulder season [when visitation is low] has been bolstered recently because of the Mercy Street filming endeavor. Restaurants that are in former, well-preserved historic buildings are a huge attraction.*

*There are seasonal trends. The Fall visitor is an older, retired heritage tourism person. They spend the most money. They pay for the tour and they don't usually ask for discounts. They buy things for their grandchildren. They come here because it is a beautiful community, they learn about the history and they eat in cute restaurants.*

*Springtime brings the magic of little cherry blossoms, and it brings families. They do [Washington] DC in a day and then Alexandria and Mount Vernon in a day; this is the whirlwind visitor. They want to show their children the value of history, they hit a few sites, and they buy a few things in the shops.*



*A lot of foreign visitors come in the summer; it's also the slowest season. It's very hot here! We try to offer public programming in our shoulder seasons, to keep a constant visitation level when tour numbers dip. We can't compete with spring and summer festivals, but winter, November through March, is the height of the public programming season.*

*For out-of-towners, we're a day trip from Washington, DC. We get a lot of international visitors because of DC. Locals think of Carlyle House as a place they went to once when they were a kid; recent programs have been demonstrating that it has more to offer. We're partnering with other assets, like the Apothecary, the Tavern, etc. We can break groups into 20 and have them rotate through up to four site offerings. School tours are free if the school is within the jurisdiction, minimal fee if outside. Facility rentals are not a huge part of visitation, but the garden is – three quarters of an acre right in Old Town across from City Hall. This is a popular pop-up wedding destination, usually for locals.*

### **Marketing and Promotion**

Heritage tourism site directors are also working to tap new markets and to deliver heritage tourism experiences that will be meaningful to contemporary visitors.

*We have a very white audience. So we have tried to diversify through the Scouts program. We do a lot of Girl and Cub Scout-related programs. We do an overnight, and then see families coming back for other events. We give patches for our events and then we see kids out in the community who have come to our events. There's an endless supply of Scouts! More keep coming up through the ranks.*

And they work to build appreciation of heritage through the life cycle.

*We started the Culture at Gadsby's Tavern Over the Years program. We get the toddlers and their parents in there, then we offer a range of birthday parties. For 3 and 4 year-olds, it's birthdays at the Firehouse. For 6, 7, and 8 year-olds, it's tavern parties, and for 9, 10, and 11 year-olds, it's science programs; they can be gender specific or neutral. Teas, fencing programs, games – we have a wide variety of programs to keep them coming back, and we age them out over time. We've also started junior docent programs, foodie programs, period dinners, balls, and banquets to keep them coming back through adulthood.*

*We don't have a huge budget for marketing. We do a weekly on the Alexandria listserv. We believe in paper and we send out press releases. We put ads in three different*

*kids/parent's magazines. A lot is word of mouth. Google "birthday parties" and our parties will come up in your browser. We do parties before the Firehouse museum opens to the public. It depends on the specific site but we probably do 8-10 birthday parties a month at each site.*

*Candlelight tours have been going since 1982. We thought they would die on the vine, but the Groupon packages came around, we sold out and have gotten a younger and more diverse audience.*

*The Port City Brewery in Alexandria was named best brewery of the year, attracting an audience with a huge disposable income. They did a beer called Long Black Veil, a female stranger story. They debuted the beer at Gadsby's Tavern on the night and in the place she died. Over 100 people came and we made a ton of money. We had tapped into a new demographic and a new audience. Utilizing Groupon and other restaurant networks has been really helpful to us.*

Several site directors explained that they target their marketing to schools.

*Morven Park puts emphasis on school programs, [drawing] up to 3,700 [students per year]. They don't charge for them. [They can] handle groups of up to 120 students. [They] match programming to Standards of Learning and local school system requirements. This has become a model with 20-30 teachers coming each week to learn how they have implemented these programs. They are looking at how to take them to a national level. They don't make money, but there is support from the community to keep the programs running.*

*Locals were really unaware that we even exist. By focusing on school children, we can try to encourage their parents to come.*

*By reaching children, we can try to reach their parents, too. And each year, more children come. If we shut down tomorrow, the school administration would be upset.*

Other target groups for most of the sites are weddings. Some sites can host up to 1,000-person events.

### **Historic House Tours in the 21<sup>st</sup> Century**

Historic house tours, once a mainstay of heritage tourism, now must be reconfigured and repackaged to appeal to the 21<sup>st</sup> century visitor.

*People want to experience. People love to snoop. They want to get in the “big house.” We have been struggling to find a way to help people engage with everything and have an experience on their own. We haven’t found an answer yet. Why do people love the Mercy Street connection? So they can get there and see “behind the scenes.”*

*People want a package. Late 20s to 50-ish, people want to get a place to stay at an inn, get a private tour of Morven Park for example, and get lunch and then a whiskey-themed dinner at Aldie at night. A package. We know we collaborate and have to work together, to partner with other tourism sites but also wineries and other attractions. A package is valuable, someone has picked out the details, and it allows them to just have an experience.*

*Mount Vernon’s evening wine event is popular. Programs that incorporate food and wine are actively bringing in millennials through more “fun” programming.*

### **Economic and Social Impacts of Heritage Tourism in Alexandria / Northern Virginia**

Heritage tourism is a major industry in Northern Virginia. Local site directors estimated its impacts on the region’s economy and society as follows:

*Forty percent of Virginia’s tourism industry impact comes from Northern Virginia. Historic assets are a big part of that. And the historic community brings quality of life. Alexandria is a jewel in the crown of Northern Virginia and the DC/Maryland/Virginia area. Everyone wants to move to Old Town and Delray. ... People want the walkability that a dense district offers.*

*Historic preservation in Alexandria provides us with an identity and sense of distinctiveness that others don’t have.*

*Carlyle House doesn’t have a large economic impact in and of itself, but it is a part of the larger Alexandria context. People like the feel of Old Town with brick sidewalks and such. [Each site, each building contributes to an ambience that brings tourist revenues and which makes Alexandria a highly desirable place to live.]*

*If the heritage programs went away and we had only had the buildings, tourism would drop; people would have less of an appreciation for historic preservation. We’d experience a loss in revenue, and in identity.*

*For Loudoun County, the western part of the county, the 19<sup>th</sup> century landscape, is what draws visitors to us. The landscape is pristine and untouched. Our assets combine to create what is authentic in Loudoun. If we went away and were replaced by more development, Loudoun would lose its identity and we would be like everywhere else.*

## **Conclusion**

Clearly, heritage tourism is big business in Northern Virginia and it is difficult to imagine the region's economy without it; not simply the business of history and heritage, it is fueled as well by the genuine attachment to the region's history and its historic sites that heritage tourism workers and community members manifest. Although debates about what is to be preserved and how it is to be preserved certainly occur, heritage appears to serve the region as both an economic engine and as the foundation of a high quality of life.



## **Southwest Virginia – Cultural Heritage and Economic Revitalization**

In Southwest Virginia, culture – particularly the region’s country music and crafts – constitutes a relatively new element supporting heritage tourism in the region, which has been historically tied mostly to the stunning natural beauty and the recreation opportunities Southwest Virginia affords. Although these assets have been attracting visitors for several decades, tourism based on the region’s distinct culture has only become a significant contributor to the economy in the past decade or so, largely as a result of state government-led marketing and promotion efforts.

Over the past 200 years, Southwest Virginians have made their living largely from subsistence farming, lumbering and furniture-making, coal-mining and textile products. Although Abingdon, a southwestern gateway to the West located on the eastern fringe of the region, became a prosperous trading town and seat of government and Roanoke became a prosperous railroad and market city, towns in between remained small and the region’s economy was based mostly on low value-to-weight products, and subject to boom and bust cycles.

In the early 1960s the Appalachian Regional Commission (ARC) was established to address the entire Appalachian region’s economic challenges. Despite the ARC’s success in building infrastructure, bringing jobs and reducing poverty, Southwest Virginia’s economy remained dependent upon factories and mines that were still subject to wide employment fluctuations. But in the late 20th century, long-term, not cyclical declines in manufacturing and mining left the region reeling from massive employment losses. Between 1970 and 2010, employment declined in every major industry: Mining (49%), Manufacturing overall (36%), Furniture (56%), Textile Products (80%), Agriculture (27%).<sup>22</sup>



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<sup>22</sup> PowerPoint presentation provided by Todd Christenson, Heartwood Center: *Southwest Virginia Creative Economy Initiatives in Southwest Virginia*, no date

### **The “Creative Economy” Strategy – Promoting Local Cultural Assets**

In the face of this decline, in 2003 the Commonwealth of Virginia, through the work of its Department of Housing and Community Development and other agencies, and with funding support from the Virginia Tobacco Indemnification and Community Revitalization Commission and other sources, began to develop an economic revitalization strategy for the entire 19-county, four-city region. The strategy would seek to support, enhance and, especially, market and promote worldwide the region’s distinctive culture, expressed primarily through its music, woodworking and textile crafts. Thus, heritage tourism in Southwest Virginia is the result of recent, government-led initiatives that have built upon the culture that developed in this region over the previous two centuries.

Cities such as Abingdon, Roanoke and Marion have beautiful historic districts and the region’s towns have charm and encourage visitation, but its heritage-tourism assets consist, for the most part, of distinctive quilt and furniture-making and, especially, country music jam sessions in towns and villages throughout the region. Some music events, such as the Floyd Country Store Friday Night Jamboree (since circa 1910) and the Old Fiddlers Convention in Galax have been known to outsiders for many years. Other well-known places associated with music include the Bristol Birthplace of Country Music Museum (which commemorates the first recordings of country music in 1927). And the region’s famous people are not only politicians or war heroes, but musicians, such as Ralph Stanley, Frank Newsome, and the Carter Family. But the musical culture of this region goes far beyond these few emblems. As one focus-group participant expressed it:

*The culture is that people sang about what they were doing. This music was a lifestyle. .... Friday and Saturday night, people played and those who could sing, sang, and those who could do neither, would clap their hands. This was the cultural heritage.*

Over the course of the past decade, and with state government encouragement and funding support, the region has mounted one initiative after another to market its music, crafts, and natural heritage to the world beyond Southwest Virginia, creating the following organizations.

*[We’re] not discovering anything new. Highlighting all that was here. These are all authentic experiences. Nothing is contrived.*





*The Crooked Road – Virginia’s Heritage Music Trail:* By far the most well-known, and perhaps the most successful to date of the initiatives, The Crooked Road was incorporated in 2004. It is a music heritage trail extending from Rocky Mount in the east to Breaks Interstate Park in the west, featuring ten major music venues and 58 affiliated partners in 19 counties with weekly events.

*There are 26 Crooked Road waysides, physically on the landscape. With kiosks and narrations. From the Breaks to Rocky Mount. Signs about every five miles. Got state designation. [Governor] Mark Warner was a real pusher [of this initiative].*

The Crooked Road is governed by a Board, with representation from communities throughout the region, which solicits interest from communities throughout the region and then promotes them:

*Our role is a marketing role. [We create a] website and visitor guide, collate that info from existing venues. If [specific venues] are not doing what we don’t think is heritage music, we won’t promote them; but we [include] what the sites are doing locally [in our materials].*

*People are often surprised to hear that there is much more than just bluegrass. Heritage music -- we are talking about music forms that have been perpetuated in the area and*

*within families, so this often predates the electric guitar, for example. A lot of grey area, of course, along the spectrum of hard core traditional through more mainstream; often not commercial in nature, at all.*

*Sometimes it is hard for people to understand our mission. Particularly interested in music that is tied to this place. And this is traceable in many cases. Like generations of people continuing a tradition. Authenticity. But we can still appreciate other aspects, too.*

*[The visitor guide has] major venues and red dots corresponding to affiliated venues and festivals. By month and year, jam sessions and concerts by day of the week. Affiliated venues are what help make it a year round destination. So even in the winter, there are music events, however informal.*

*There's also a Teacher's Guide [with] eight lesson plans and a CD that corresponds to the Guide. [It's] published by [our] music education arm and meets Virginia Standards of Learning. [We also publish a] Treasury of Music CD and we're working on 100 Years of Guitar – a two CD set.*

Within a couple of years, the Crooked Road had begun attract tourists from around the world to Southwest Virginia:

*[It] contributed \$23 million in economic impact to the counties it serves in 2008, drawing more than 260,000 visitors to the region ... [It] increased lodging revenues more than 60 percent in towns across the region. ... [and as a result has seen] more than 100 new businesses emerge along its route within the last four years, creating hundreds of new jobs for the area.<sup>23</sup>*

This success encouraged the region's leaders to expand their scope to the region's distinctive craft culture:

*The Crooked Road was the first quality of life initiative that came about with the creative economy effort in 2003 as an idea. Within 18 months it got international press. This success was a catalyst for what came afterwards. It opened eyes in local government. We had pooled our resources and did something together and it had this success, so let's do more of it [we said]. Round the Mountain resulted.*

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<sup>23</sup> Ibid.



*Round the Mountain – Southwest Virginia’s Artisan Network:* Established in 2008, Round the Mountain is a network of 15 artisan trails in 19 counties and four cities, linking more than 500 artisan studios, galleries, agri-tourism sites, local-food restaurants, and bed & breakfast establishments throughout the region.

*Our crafts, like furniture, used to be utilitarian. There was quilting as well. Aspects of economic hardship are shown through the local crafts. You can see how these art forms vary from town to town. [There’s] a rich network of those artists.*

Although Round the Mountain is a regional network, it is headquartered at Heartwood, in Abingdon (see below), where many artisan products are also displayed and can be purchased.

*Appalachian Spring:* This initiative, begun about 2008, links nine major recreation destinations with communities throughout the region. These include assets such as Grayson Highlands State Park, the Virginia Creeper Trail from Damascus to Abingdon, Hungry Mother State Park, White Top Mountain, Cumberland Gap National Park, and others.

*The third leg of the stool is outdoor recreation ... in addition to The Crooked Road and [Round the Mountain] artisan trail. We took existing anchors, like Blue Ridge Parkway,*

*New River, Appalachian Trail, Clint River, High Knob recreational area, Breaks Interstate Park. The Cumberland Gap sees a million people a year, but very few come to Virginia. Idea was to link these anchors [together and with the cultural offerings] and capture these people.*

*The idea is to change the culture and make a creative economy. Appalachian Spring was to get ad hoc groups at each of these [established natural areas], to develop economic uses of the assets. For example, trailheads, parking lots, rest rooms – link them as assets and then do additional downtown development to create the climate for entrepreneurs to come in and invest, and diversify the economy. ... Appalachian Spring is a network, on a map, of connections.*

Heartwood: Southwest Virginia's Artisan Gateway is a physical manifestation of the region's heritage-tourism strategy. Built in 2011 in Abingdon, this 29,000 square-foot structure is meant to serve as a focal point and portal to all heritage tourism efforts in Southwest Virginia. It houses the Crooked Road Music Store, numerous artisan displays, a regional food restaurant, a coffee and wine bistro, and a kiosk to help visitors plan their stay in Southwest Virginia, connecting them to artisan studios, music venues, craft trails, and outdoor recreation offerings. It also houses the offices of Round the Mountain and The Crooked Road.<sup>24</sup>

Downtown Revitalization: An important part of the Commonwealth's economic development strategy for Southwest Virginia has been the revitalization of historic traditional downtowns, such as Galax, Floyd and Damascus. These are the sites of music jamborees, the storefronts and homes of artisans, and connecting points to nature and recreation areas in the Appalachian Spring network.<sup>25</sup>

The Southwest Virginia Cultural Heritage Foundation: Established by the Virginia General Assembly in 2008, the Southwest Virginia Cultural Heritage Commission is the coordinating body for The Crooked Road, Round the Mountain, Appalachian Spring, downtown revitalization, and related initiatives. Consisting of 23 appointed members and an executive director, the Commission provides overall guidance and marketing resources to each of the initiatives.<sup>26</sup>

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<sup>24</sup> PowerPoint presentation provided by Todd Christenson, Heartwood Center: *Southwest Virginia Creative Economy Initiatives in Southwest Virginia*, no date

<sup>25</sup> Ibid.

<sup>26</sup> Ibid.

In 2010, the General Assembly established the Friends of Southwest Virginia to serve as the implementing arm of the Foundation. Its governing board consists of the executive committee of the Foundation, as well as other regional representatives.<sup>27</sup> Focus-group participants described the organization as follows:

*For the funding agencies that were getting requests from people in the region doing related work, the General Assembly created the Cultural Heritage Foundation in 2008 to help organize this. So the Foundation supports what The Crooked Road and Round the Mountain do. They support directives like the Heartwood center as well as the Southwest Virginia website. But also part of this quality-of-life work includes downtown main street revitalization, laying Broadband, etc.*

*Around the Mountain, The Crooked Road, and the Cultural Heritage Foundation all have separate 501(c)3 (non-profit) status. All are economic-development focused, all have the same 19-county and four-city footprint, and all share physical space and resources at Heartwood. Therefore, we are all pulling on the rope together.*

#### Putting it All Together – The Southwest Virginia Experience

*If you look at The Crooked Road, it's about the music, but [the experience is] more about the people. Immersing yourself in one of the towns for one or two days is how you get to know the music. High lonesome sound, versus flat foot. These are sounds of despair, based on the economy, like job loss. These things influence the sound of the music. Do some other ancillary activities, like tubing, and then stay over, and then go fishing, and then can catch another music event. [Connecting the experiences this way can keep] people for multiple days.*

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<sup>27</sup> Ibid.





### Heritage Tourism Impacts

Southwest Virginia's heritage tourism initiatives appear to have produced good results in a short time. According to Jack Morgan, who completed an impact analysis for the Friends of Southwest Virginia, the results to date are impressive:

- *Travel expenditures in Southwest Virginia increased by 43% from 2004-2012, reaching a record high \$927 million in 2012. This was a higher increase in travel expenditures than the Commonwealth of Virginia as a whole during this same time period (41%).*
- *In 2012, \$22.5 million in local tax revenue was generated from travel in the region – a 28% increase since 2004.*
- *Travelers in Southwest Virginia also generated over \$41.1 million in tax revenue for the Commonwealth of Virginia in 2012, resulting in over \$63.6 million in total tax revenue generated from travel in Southwest Virginia – a 27% increase from 2004.*
- *9,504 jobs exist in Southwest Virginia as a direct result of travel, as of 2012.<sup>28</sup>*

The jobs and tax revenues will bring much-needed funds for local needs, such as schools. As one focus-group participant stated:

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<sup>28</sup> Morgan, Jack: *Southwest Virginia: Authentic, Distinctive, Alive*, for Friends of Southwest Virginia, undated, p. 4



*One important thing that the Crooked Road and Round the Mountain bring: For an underfunded school system, with things like music and the arts, the keeping alive, and thriving of this musical tradition is huge.*

These quantitative results, which are consistent with the quantitative results we reported in the previous sections of this document, are impressive. But equally or more impressive are the qualitative impacts – what heritage tourism is coming to mean, not just for visitors, but for the longstanding residents of this region. Chief among these is a renewed sense of pride in the community and region, and a desire to come back, or perhaps to not go away in the first place:

*Our kids are leaving and they're not coming back. This is the tragedy that communities are all facing. So, what we are trying to do is that you need to create a town where all of the 25-year-olds want to come back. Fiber optics and quality of life are what are needed. To make people come. ... It might not be your kid who stays or even comes back, but you set the stage for them all to come back.*



*All we did was shine a light on what was happening here musically. Appreciation and acknowledgement came from the outside, and this has led to a greater sense of pride in the region.*

*Growing up in Bristol all I wanted to do was to get out, but now it has way more stuff to do. And so it has become that more people want to stay in the area. There is a larger portion of people who stay. "Stay Southwest" – they promote that people stay. But even people who did leave, have come back. [They now] see its assets as benefits.*

*It's cool to be from Appalachia now.*

## Challenges

Southwest Virginia's creative economy initiative is a very ambitious undertaking, requiring not only financial resources, but organizational and political ones as well, in a large region where such public-private, cooperative initiatives have not taken place previously at anything like this scale. In little more than a decade, it has accomplished a great deal. Nevertheless, it still has some way to go to realize its full potential.

Some focus-group participants raised concerns that generally fell into one of two categories. One is the challenge of connecting communities and their venues and services with the region-wide networks, such as The Crooked Road in a sufficiently timely way so as to inform prospective tourists. Another challenge concerns that of operating and governing the different organizations, given the many organizations that have been formed and varying interests throughout the region. Some participants expressed this as follows:

*We are all working on it, but we are not there yet. Heartwood was supposed to be a gateway to tourism of the region; kiosks upstairs where you can plan a tour, of the region. A map of all the counties of Southwest Virginia, with all the categories of things to do; on the website as well. We are making efforts to work together, with heritage venues, like Feast-ival. But we could do more.*

*There are so many meetings and named initiatives, it is hard to keep it all straight. A branding campaign would be the greatest thing they could do, especially if everyone would buy in. It's not about getting people to come from one Virginia county to another, it is about getting someone from Ohio to come to Southwest Virginia; exporting tourism and importing revenue.*

## Moving to Stage II

One way to think about Southwest Virginia's success with heritage tourism to date and the challenges yet to be overcome may be in terms of stages. During stage I, we might say, initial support, organizing, and successes were achieved – a tremendous achievement, in fact. Now the region is entering a second stage of development, in which the details will need to be put in place to sustain the initiatives over time. As focus-group participants expressed it:

*When you think about what Southwest Virginia as a region has done on a collaborative basis, you see what some creative and imaginative people have created. Not many areas in the country have collaborated on such a regional scale. In general, we see more welcoming and collaboration than resistance throughout the region.*

*The key for us is not mucking up what's here. Everybody I work with loves this place they live. All the people pulling on the rope want to see this done in a way that when we reach some end point of success, we have not adversely affected or changed that which makes us love the place in the first place.*



### **Conclusion - Cultural Heritage and Economic Revitalization**

Certainly cultural heritage tourism in Southwest Virginia has achieved a great deal in a short time. But how much has it helped the region recover from its late-20<sup>th</sup> century economic free-fall? To what extent can this economic revitalization strategy carry the region forward? Some analysts and

stakeholders, while supporting the heritage tourism strategy, believe that more is needed.

John Provo, Director of the Virginia Tech Office of Economic Development, cited the generally low-wage jobs typically associated with accommodation and other tourism-related employment, and noted that average wages in the region have been declining precipitously.<sup>29</sup>

Some focus-group participants voiced concerns as well:

*In the coalfields, the coal is not coming back. The furniture and textiles are not coming back. On the eastern side, we are looking at the next Appalachia, but it not going to be THE economic driver. It can help. Can it help enough to recover in general? Probably not.*

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<sup>29</sup> Provo, John: presentation, April 2014, Atlanta, Georgia, Annual meeting of the American Planning Association



*But this can't be the last or final chance to bring back the economy. Crafts, outdoor recreation can help, but it is not the only solution. There has got to be something to create jobs for the middle class.*

Can heritage tourism perhaps be the beginning of an economic spark? Focus-group participants put it this way:

*Two hundred and fifty thousand people ride the Virginia Creeper trail [each year]. Why not build bikes here for this and not buy them in North Carolina? This would increase the effects of tourism in the economy [and perhaps increase wages].*

*Food is an undervalued asset starting to be explored more recently. Food culture is important here; of course the music culture. From the land, traditional agriculture, plus sustainability agriculture, which is sustainable agriculture.*

*Tourism provides the opportunity to build upon. For people who grew up here, it's a matter of realizing what all is here. Why would people want to vacation here? The site where Dirty Dancing was filmed – people from other areas who do not have this kind of resource and they want it. And the music just helps underscore the authenticity of the experience. Appreciating the assets that are here. The challenge for each of the communities is to take those assets and decide how to market them, invest in them, etc.*



## The Eastern Shore: Building Upon Natural Heritage

“You’ll love our nature,” the title of the Eastern Shore of Virginia Tourism Commission’s tourism strategy (2008) and its branding tagline, expresses well the foundation of heritage tourism in this region. Although the region also has a treasure trove of manmade structures, some of which pre-date those of the rest of the Commonwealth, and a way of life and culture that are attractive to many, it is primarily the Eastern Shore’s magnificent beauty and natural resources that have drawn visitors to date.

The opportunity and the continuing challenge for the Eastern Shore is to leverage its beautiful natural environment, as well as the stories of human settlement there to overcome its economic challenges, without sacrificing the more relaxed way of life that many find so attractive. As Cape Charles focus-group participants expressed this sentiment:

*One thing we do not want – We do not want to be Nags Head. We have the land trust in order to prevent it. The Nature Conservancy owns a lot of land, and a number of landowners have put their land under easement. ... We want a nice, moderate stream of visitation, but we don’t want it taking over. We don’t necessarily want the craziness of the city and so we want to protect that – balancing the resources and amenities with the small-town feel. [For example], we don’t allow chains [in Cape Charles].*

*We sell relaxation and nature. ... To slow it down is an opportunity. ... People let their kids walk and bike around sometimes unattended.*



*We love it here. The people who live here all the time – we are who we are and we love it. For instance, Colonial Williamsburg was dragged along to be able to do things like conferences and conventions and such, and we don’t really want to do this in Cape Charles.*

*If it’s good for the people who live here, then it’s good for the tourists too. Locals can get out and enjoy their community if the resources are there – like having a place to eat breakfast on a Tuesday morning.*

## Natural Assets and Related Commercial Enterprises

The Eastern Shore of Virginia Tourism Commission listed the following as the region's key natural assets:

- The longest stretch of undeveloped coastline on the East Coast.
- An internationally acclaimed biosphere of pristine barrier islands, marshlands, bays, and forest.
- A narrow peninsula bordered by the Chesapeake Bay and Atlantic Ocean (just a few minutes' drive from Bayside to Seaside), with water sunrises and sunsets.
- Miles of undeveloped beaches.
- World-class bird-watching [the peninsula is a flyway and key stopover point for migrating birds].
- World-class fishing and hunting.
- Chincoteague Island, family beach resort and home of the famous wild ponies.<sup>30</sup>

In recent decades, parks, wildlife preserves and commercial facilities have developed to protect the Shore's ecosystems and to structure and enhance the visitor's experience of the region's natural beauty. Assateague and Chincoteague Island, on the northern border of Virginia, balance a family beach resort, historic fishing town and a unique wildlife preserve. The Eastern Shore Welcome Centers greet visitors and orient them to both the natural and human history of the Shore.



Throughout the peninsula are popular nature-oriented commercial facilities, such as *Cherrystone Campground* and *Sunset Beach*, as well as golf courses and marinas.

Numerous nature-based heritage tourist activities also occur. A small sample includes eco-tours, scenic cruises and kayaking,

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<sup>30</sup> Eastern Shore Virginia Tourism Commission: *You'll Love Our Assets*, PowerPoint presentation. [sfc.virginia.gov/pdf/economic.../No%203%20Eastern%20Shore%20Tourism.pdf](http://sfc.virginia.gov/pdf/economic.../No%203%20Eastern%20Shore%20Tourism.pdf), accessed September 24, 2016.



lectures and cultural activities at the *Barrier Islands Center*, and events such as the annual *Birding Festival* in Northampton County.

### **Built Heritage Assets**

Although it is the natural beauty and beaches that attract most visitors, the Shore's natural and man-made heritages are inextricably linked. As Curtis Badger explains:

Captain John Smith explored the waters of the peninsula in 1608, and since that time the fertile land and the water that surrounds us have defined the history and culture of the two counties that make up the Eastern Shore: Accomack and Northampton. For centuries, the land has provided a wealth of vegetables and grains, making the Eastern Shore a great provider of food for Virginia and beyond. The shallow waters and tidal flats that surround us have also supplied a bounty of oysters, clams, crabs, and fish. And the bay and ocean have given us a convenient source of conveyance, a way of getting our vegetables, grains and seafood to eager markets in Baltimore, Philadelphia, Norfolk, and many other cities. ... Sail gave way to steam, which gave way to rail, which gave way to highway.<sup>31</sup>

Four centuries of agriculture and water-based industry, tied together by boat, then rail and then road, have created a region of small, historic towns and villages.

The total population of the Eastern Shore of Virginia [45,553 as of 2010]<sup>32</sup> is equal approximately to that of the university city of Charlottesville. Yet there are no fewer than one hundred and eleven separate distinct villages on the Shore, more than half of which are "official" enough to have a U.S. post office.<sup>33</sup>

Although unheralded and largely even unknown until recently, the Eastern Shore's built environment and human history are becoming a secondary tourist attraction, as visitors who come to enjoy the natural beauty and water-based amenities discover the area's human history. The region has scores of historic homes, churches, commercial structures and village centers. A small sample includes the following.

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<sup>31</sup> Curtis Badger: *Virginia's Eastern Shore, A Brief History*. Eastern Shore of Virginia Tourism, [http://www.esvatourism.org/es\\_about/our\\_past.asp](http://www.esvatourism.org/es_about/our_past.asp), retrieved September 24, 2016.

<sup>32</sup> U.S. Census Bureau, *2010 Census of Population and Housing, Population and Housing Unit Counts, CPH-2-48, Virginia*, U.S. Government Printing Office, Washington, DC, 2012, pp. 6 & 7.

<sup>33</sup> Kirk Mariner: *Off 13: The Eastern Shore of Virginia Guidebook*. New Church, VA: Miona Publications, 1997, pp. 10-11.

Eastville, where the Northampton County Court began convening in 1677, has a Courthouse Green that was developed beginning in 1715; it features buildings from the 18<sup>th</sup> through the 19<sup>th</sup> centuries. Most importantly, perhaps, the Courthouse:

contains one of the greatest treasures of the Eastern Shore: the oldest continuous court records in the United States. Northampton County's records date from 1632 without a break, having escaped fire, vermin, and neglect.<sup>34</sup>

*Sites that are preserved like Pear Valley and Eyre Hall – two National Landmarks on the Eastern Shore. Pear Valley is a yeoman's cottage and shows how people lived [in the 1600s].*

Eyre Hall is a Virginia Historic Landmark, one of the best preserved eighteenth century plantation complexes in the state. Littleton Eyre built the earliest part of the house in the mid-1700s. His descendants still own the property. ... So strong is the tradition of hospitality here that the house is open every year at Garden Week, and its formal gardens are open to the public.<sup>35</sup>

The Eastern Shore's heritage tourism advocates believe that the region has hardly begun to tell its story:

*It's the story of America's beginning and its formation for the first several hundred years. Our stories are probably the most continuous. Our story is ongoing; it has never gone away. Giving people access to this story is paramount.*

*Arlington as a site and a story is incredibly under-told. [This is the site of the tombs of the Custis family, an Eastern Shore dynasty, connected by marriage to Martha Washington and Robert E. Lee. A Custis heir built and named the famous house on the Potomac River Arlington, after the estate on the Eastern Shore. The name was then passed on to the county and, after the Civil War, the cemetery.]*

*Our genealogy records are another important asset. [We] could be the genealogy center of the universe, because of the Eastern Shore center [Genealogy and Historie of the Eastern Shore] and the oldest court records. Plus the watermen's story. ... The Indian story is also under-told.*

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<sup>34</sup> Mariner, *ibid.*, p. 85.

<sup>35</sup> Mariner, *ibid.*, p. 21.

## Museums and Historic Sites

The Eastern Shore boasts 13 museums and historic sites that tell parts of the region's natural and human history. These include the *Museum of Chincoteague Island*, which tells the story of the wild ponies and the famous Assateague lighthouse; the *Chincoteague National Wildlife Refuge*; the *Eastern Shore Railway Museum*; the *Eastern Shore of Virginia Historical Society at Ker Place*, a Federal style mansion and history research library; the *Eastern Shore Watermen's Museum and Research Center*, which chronicles the history of the seafood industry on the Shore; the *Barrier Islands Center*; *Northampton Historic Preservation Society* in Eastville, which displays and interprets the history of the Courthouse area; the *Cape Charles Rosenwald School*, built for African American children in 1928; the *Cape Charles Museum and Welcome Center*, which features the Arlington House history, and particularly the history of transportation on the Shore, including the railroad, ferries and barges, and the Chesapeake Bay crater (the story of the meteor that formed the Chesapeake Bay); the aforementioned *Arlington Plantation Site* with the Custis Family Tomb; and the *Eastern Shore of Virginia National Wildlife Refuge*.<sup>36</sup>

## Heritage Tourism Organizations and Marketing

Several organizations play important roles in promoting historic preservation and heritage tourism on the Eastern Shore. These include the Eastern Shore of Virginia Tourism Commission and the Eastern Shore Tourism Alliance, which is affiliated with local chambers of commerce. Working with the Virginia Tourism Corporation, the Eastern Shore Tourism Commission created the *You'll Love Our Nature: Tourism Strategy for the Eastern Shore of Virginia* in 2007, and it works to promote all aspects of the tourism industry on the Shore.<sup>37</sup>

The Eastern Shore Museum Network (supported by the Virginia Foundation for the Humanities and the Eastern Virginia Tourism Commission) is, perhaps, the organization that most deliberately links historic preservation with heritage tourism on the Shore. It organizes quarterly meetings among the aforementioned museums and preservation advocates, as well as an annual meeting hosted by Eastern Shore Community College. Although funds are limited, advocates view the network as an important vehicle for advancing heritage tourism on the Shore:

*The theme of education ties us all [museums and other heritage tourism supporters] together and this includes the Rosenwald School initiative. The topic of [moving from] segregation to integration is also a theme that might pull some of the museums and sites together.*

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<sup>36</sup> *Share the Knowledge*: Eastern Shore Museum Network brochure, undated.

<sup>37</sup> Eastern Shore of Virginia Tourism Commission *You'll Love Our Nature: Tourism Strategy for the Eastern Shore of Virginia, 2007*.

Focus group participants expressed a desire to expand their ability to tell the important stories of the Shore through historic assets. For example:

*There is still a disconnect between heritage tourism offerings and the African American population. How do we draw these people in better? How can we make it more inclusive?*

*We are aiming to focus on this more. We did a Black History month event that looked at slave narratives and we offer some interpretation at Ker Place. The education aspect may be what can be used to link the work of historical societies and the Museum Network vis-a-vis family history.*

Yet, advocates see the need for more collaboration among organizations and stakeholders.

*Our things are so sporadic. We randomly find out about things. So many stories [everywhere] if you drive off the main road. If you pull all those together, you have one hell of a story! But how to pull them together?*

*More collaboration is always beneficial- the brochure that lists all of the museums on the Eastern Shore - this is helpful to hand people and to serve as an ambassador and to suggest day trips.*

### **Local Government and Heritage Tourism**

Although focus group participants expressed mixed views about the financial ability of local government to support heritage tourism, all stated that local government understands the importance of it and wants to be supportive:

*So many people asking for resources and there aren't enough to go around. We just received a letter that the town is not giving money to organizations anymore. We are in the process of replying to show the case for how much the museum actually contributes to the town. They do the best they can, I think.*

*We are all for it. The town council does all sorts of promotions, and will try to drive people here. There's a heritage trail that goes around town, plus a really nice map. The town knows that anything to promote the town, they are for it, because the end result is that it boosts sales. We are having more housing starts here than in the last 10 years. Not huge amounts of money but enough that it works and shows a return.*

Several participants identified a need for more and better communication between local government offices and heritage tourism venues and ancillary organizations about public policies and regulations that affect the industry and about opportunities to expand it. They cited resource limits as the main barrier to achieving better communication, but they also cited a generally improving climate for heritage tourism and appreciation of the Shore in recent years.

It is important to recognize that a significant amount of the work of promoting the Eastern Shore's heritage is done by volunteers. Fortunately, the natural beauty and slower pace of the region attract and keep people who value heritage and want to contribute to it:

*This is an incredible community for volunteerism. For retirees or second-home owners. Retired people, as well as working people, give a lot to the community.*



### **State Government and Heritage Tourism on the Eastern Shore – The Artisan Trail**

The Commonwealth has provided assistance to the Shore in various capacities and through various agencies, especially the Virginia Tourism Corporation (VTC). One of the VTC's most notable recent initiatives is the Artisan Trail, established in 2015. The trail features locally owned and operated, single-location operations, using craft-based production methods and personal service. The Eastern Shore Artisan Trail includes:<sup>38</sup>

33 artisan studios, including painting, jewelry, yarn and fabrics, furniture, and carvings;

10 craft-related venues, including clothing, art galleries, wine & cheese shops, and books & music;

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<sup>38</sup> Virginia's Eastern Shore Artisan Trail. ArtisanTrailNetwork.org brochure, undated.

13 agri-artisan/farms, including dairy products, gourmet foods, a teaching farm, natural fibers, rare plants, and saltwater tours;

17 restaurants, featuring everything from artisanal ice cream, to sandwiches, to seafood;

10 lodging locations - bed & breakfasts and inns;

29 additional points of interest, including a wide range of entities, such as eco-tours, schools, natural heritage museums and sites, etc.

Local heritage tourism advocates expressed appreciation for the work of the Virginia Tourism Corporation: *The connection with VTC is really good*, said one.

### **Visitor Demographics**

For the most part, the Eastern Shore draws visitors from at most a few hours' drive away. As one B&B operator explained:

*Half of my visitors come from the Hampton Roads area, the other side of the bridge, as an escape from the bustle of where they live. These people are often Virginians, and actually want to learn more about the history of the Eastern Shore. The next group is [from the Washington] DC - Baltimore area, very few from the South. The next group is from six hours or so from the North. These are the ones that use Cape Charles as a hub and then go on daytrips. ... They don't want to go to Virginia Beach; they want a smaller, more intimate experience. ... After the people who want to get away [from the more populous recreation areas], it's destination weddings. These can be two-three day events with families and they all want to have other activities to do, so they aren't just with their families.*

*Weddings are a big driver. And if you come to a wedding and visit, you'll come back with your family. You can rent a house for 15 at a decent cost.*

Others (museum operators, local government officials, and others) expressed a similar perception:

*We have been getting overflow from the Outer Banks. And it's cheaper here.*

*Wallop's Island has a big effect on Chincoteague visitation, but not much on the southern part of the Shore.*

*Mainly people coming are a day's drive away. Usually from the North. Once in a while from North Carolina, to get away from the crowds.*

### **Economic and Social Impacts**

The economic impact of heritage tourism – particularly the natural aspect – is substantial.



*From [Memorial Day] until Labor Day Route 13 is like an interstate [highway].*

*[The economic impact is] retail and restaurant businesses. ... They eat and drink and sleep.*

*Having these people visit makes the world spin around – keeps [B & Bs and restaurants] in business, keeps the shops open. ... Tourism is the area's direction; what we've been trying to find.*

But the impact is also limited in two ways – geographic and temporal:

*So much of the traffic up and down goes past everything on the way to or from, but it doesn't stop [or get off Route 13]. ... We need to sell ourselves and identify ourselves.*

*The challenge is to come up with a 12-month economy. What do we specialize in and how can we expand on it?*

*The key strategy needs to be to build a shoulder season, to help counteract the 90-day tourism economy. To bring people here beyond the obvious summer season.*

Nevertheless, some long-term residents are apprehensive about the changes that the growing tourism economy is bringing.

*[There's a] perception of some locals that visitors can be a bad thing; that we are going to become the Outer Banks.*

*We have some old timers who don't like change, but it's happening. And they need to understand. Some of us are trying to direct it in a way [e.g., through zoning] that we don't become the North Carolina shore.*

Misgivings notwithstanding, focus-group participants seemed unified in the view that heritage tourism is essential for the economic health of the region and that it should be enhanced.

*If these [natural heritage] resources weren't here, we'd lose our history. If the natural were gone, the whole thing would be lost.*

*[Moreover], our county is in such desperate [economic] shape that if we continue to play the race card or the have and have-nots, we are not going to get anywhere.*

## **Conclusion**

The Eastern Shore's natural and human heritages provide the basis for a tourism economy that celebrates a slower way of life, artisanal products, small-town and village charm, and a natural environment that is largely protected from development. Local advocates and stakeholders, working with state partners, have begun to capitalize on these assets. Much remains to be done, but much has been achieved and there is significant potential to enhance heritage tourism.

## **Report Conclusion**

Virginia is richly endowed with natural beauty, cultural heritage and historic places. As this report indicates, Virginia has not squandered these unique assets; for the most part, it has nurtured them. It is now building a successful heritage tourist economy with these assets, bringing appreciation and wealth to Virginia.

In Southwest Virginia, comprehensive heritage tourism efforts are relatively recent and the Eastern Shore is working out what level and volume of tourism is optimal to maintain the region's quality of life. But the beauty of heritage tourism is that it is authentic. It is, as the passage from the National Trust for Historic Preservation quoted at the beginning of this report states: "...traveling to experience the places and activities that authentically represent the stories and people of the past and present." By opening itself to heritage tourists and sharing its communities' stories with them, Virginia shows itself at its best and can strengthen the state, regional, and local economies.



## **APPENDIX**

## **Appendix 1 - Demographic Data: Domestic Travelers to Virginia**

This overall tourism data is collected by TNS and reported to the Virginia Tourism Corporation and is available each year. The surveys are conducted monthly. The demographic information provided in this section are based on a three-year average taken from 2012-2014. This process ensures more accurate data, as any spikes or outlying information becomes normalized.

### **Leisure Travelers in Virginia: Race and Ethnicity**

Travelers to Virginia are not very diverse in terms of race or ethnicity. On average, the vast majority of travelers are white, with 86% of travelers (see Table A2), which corresponds to 22,876,000 people. The next highest concentration of race is black, with an average of 8% of leisure travelers, or 2,128 people. The race with the third highest rate of attendance is Pacific Islanders with 3% of travelers, which corresponds to 798 people. In terms of ethnicity, an average of 95% or 25,270,000 people are not Hispanic, and 3% or 798 people are Hispanic.

<b>Table A2. Race and Ethnicity of Household Head 2012 - 2014 (in millions)</b>		
<b>Racial Distribution of Household Head (in Millions)</b>		
No Answer	2.0%	850
White	86.0%	36,550
Black/African-American	8.0%	3,400
Asian or Pacific Islander	3.0%	1,275
American Indian, Aleut Eskimo	less than 0.5%	213
Other	2.0%	850
<b>Hispanic Origin of Household Head (in millions)</b>		
Spanish/Hispanic	3.0%	1,275
Not Spanish/Hispanic	95.0%	40,375
No Answer	2.0%	850

Source: TNS Survey Results provided by Virginia Tourism Corporation

### **Leisure Travelers in Virginia: Household Size**

Household size was fairly split between a few groups. On average, 38% of travelers are from households with two people (see Table A3), which correlates to 10,108,000 people. Single travelers form the next highest group of travelers, with an average of 24% or 6,384,000 people. 3-person and 4-person households are next, with 17% and 14% of travelers, respectively. Finally, households with five people or more make up 7% of travelers to Virginia.

<b>Table A3. Household Size 2012 - 2014 (in millions)</b>		
1 person	24.0%	10,200
2 people	38.0%	16,150
3 people	17.0%	7,225
4 people	14.0%	5,950
5+ people	7.0%	2,975

Source: TNS Survey Results provided by Virginia Tourism Corporation

#### Leisure Travelers in Virginia: Age

Senior citizens made up the highest amount of travelers to Virginia with 22% of the population being 65 years and over; this is an average of 5,852,000 people (see Table A4). The 55 – 64 year age group contributes the second highest amount of travelers with an average of 20% or 5,320,000 people. The third highest contribution is the 45-54 year age group with an average of 17% of travelers, or 4,522,000 people.

<b>Table A4. Age of Respondent 2012 - 2014 (in millions)</b>		
18-24 years	6.0%	2,550
25-34 years	19.0%	8,075
35-44 years	16.0%	6,800
45-54 years	17.0%	7,225
55-64 years	20.0%	8,500
65+ years	22.0%	9,350
Mean:	49 years	

Source: TNS Survey Results provided by Virginia Tourism Corporation

#### Leisure Travelers in Virginia: Marital Status

The majority of leisure travelers in Virginia tend to married. 58% of visitors or 15,428,000 people who come to Virginia are from married households (see Table A5). On average, 22% of travelers are divorced, widowed, or separated, corresponding to 5,852,000 people. Finally, 20% of travelers have never been married, contributing an average of 5,320,000 people.

<b>Table A5. Marital Status 2012 - 2014 (in millions)</b>		
Now married	58.0%	24,650
Never married	20.0%	8,500
Divorced, Widowed, Separated	22.0%	9,350

Source: TNS Survey Results provided by Virginia Tourism Corporation

#### Leisure Travelers in Virginia: Annual Household Income

Annual household income is concentrated in the mid-range of the salaries in Table A6 below. Most of the respondents come from households of 2 people, followed by single-person households, followed by three-person households. This fact should be considered when looking at the salary ranges earned by the groups with the highest representation.

The highest concentration of travelers has a household income between \$75,000 and \$99,999 with 17.1% of travelers, which equals 4,536,000 people. The next highest group is for salaries between \$100,000-\$124,999 per year. This is the household income for an average of 14.4% of travelers, or 3,825,000 people. The third highest group of people earns between \$60,000 and \$74,999. This is the salary range for 11.6% of the population or 3,073,000 people.

<b>Table A6. Annual Household Income 2012 - 2014 (in millions)</b>		
Under \$10,000	2.8%	1,206
\$10,000 - \$14,999	3.2%	1,350
\$15,000 - \$19,999	2.7%	1,152
\$20,000 - \$24,999	4.4%	1,879
\$25,000 - \$29,999	4.4%	1,859
\$30,000 - \$34,999	4.3%	1,819
\$35,000 - \$39,999	4.8%	2,042
\$40,000 - \$49,999	8.6%	3,649
\$50,000 - \$59,999	7.4%	3,159
\$60,000 - \$74,999	11.6%	4,910
\$75,000 - \$99,999	17.1%	7,248
\$100,000 - \$124,999	14.4%	6,111
\$125,000 - \$149,999	6.3%	2,680
\$150,000 - \$199,999	5.3%	2,255
\$200,000+	2.8%	1,187

Source: TNS Survey Results provided by Virginia Tourism Corporation



### Leisure Travelers: Purpose of Travel

TNS collects data on the purpose of travel for all respondents. They ask for the primary purpose of travel to Virginia and then for all the reasons they traveled to Virginia. Table A7 shows the most popular primary reason for coming to Virginia is to visit friends and relatives with 45% of the respondents coming for this reason. The second most popular reason for traveling to the state is for pleasure and/or personal reasons with 16% of the respondents. The third most popular reason is for entertainment and sightseeing. 11% of respondents traveled to Virginia for our tourism activities. It is interesting that the second and third most popular reasons are closely related; together they add up to 27% of respondents.

Table A8 shows all purposes for travel to Virginia. For this answer, respondents could select multiple answers. The same top three purposes for travel to Virginia are the same as for all purposes to Virginia. Respondents visiting friends and family comprise 59% of the responses. Other pleasure and/or personal reasons were the second most selected answer with 33%. The third most selected answer, entertainment and sightseeing, is 31%. This table shows that the closely related personal/pleasure answer and the entertainment/sightseeing answer combine to 64%, which surpasses the top reason for visiting Virginia.

<b>Table A7. Primary Purpose for Trip to Virginia 2012 - 2014</b>	
Visit friends/relatives	45%
Other pleasure/personal	16%
Entertainment/Sightseeing	11%
Personal business	6%
Other	6%
Outdoor recreation	5%
Business - General	3%
Business - Conference/seminar	2%
All Other General Business	2%
Business - Convention/tradeshow	1%
Employee Training/Seminar	1%
Client or Customer Meeting/Service	1%
Internal Business Meeting	less than 0.5%
Sales/Marketing	less than 0.5%
Incentive/Reward	less than 0.5%
Internal Operations/Equipment Repair or Service	less than 0.5%

Source: TNS Survey Results provided by Virginia Tourism Corporation

<b>Table A8. All Purposes for Trip to Virginia 2012 - 2014</b>	
Visit friends/relatives - All purposes for trip	59%
Other pleasure/personal - All purposes for trip	33%
Entertainment/Sightseeing - All purposes for trip	31%
Outdoor recreation - All purposes for trip	19%
Personal business - All purposes for trip	11%
Other - All purposes for trip	11%
Business - Any Other General Business - All purposes for trip	6%
Business - Employee Training/Seminar - All purposes for trip	4%
Business - Client or Customer Meeting/Service - All purposes for trip	4%
Business - Convention/Tradeshaw - All purposes for trip	4%
Business - Internal Business Meeting - All purposes for trip	3%
Business - Sales/Marketing - All purposes for trip	3%
Business - Incentive/Reward - All purposes for trip	3%
Business - Internal Operations/Equipment Repair or Service - All	3%
Business - Conference/Seminar - All purposes for trip	3%

Source: TNS Survey Results provided by Virginia Tourism Corporation

#### Leisure Travelers: Total Nights Spent on Trip

Tables A9 and A10 depict the lodging habits of leisure travelers. Table A9 shows that leisure travelers are most likely to spend from one to three nights if they seek lodging. The same trend is shown in Table A10. Staying overnight for one night is the most popular choice for travel duration, with 28% of travelers staying one night. Staying more than five nights is the second highest percentage of lodging choice, with 25% of heritage travelers staying for this duration. 23% seek lodging for two nights, making this segment the third most popular choice for duration of stay.

**Table A9. Total Nights Spent on Entire Trip 2012 - 2014**

0 nights	16%
1 night	12%
2 nights	15%
3 nights	12%
4 nights	9%
5 nights	6%
6 nights	5%
7 nights	7%
8 though 13 nights	12%
14+ nights	7%
Mean:	4.8
Median:	3

Source: TNS Survey Results provided by Virginia

**Table A10. Total Number of Nights at Lodging in Virginia 2012 - 2014**

1 night	28%
2 nights	23%
3 nights	15%
4 nights	10%
5+ nights	25%
Mean:	3.7
Median:	2

Source: TNS Survey Results provided by Virginia Tourism

### Months of Travel

In 2012 and 2013, January, February, and November were the months in which the least visitation occurred (Tables A11 and A12). In both years, there was an even lower dip in visitation in February; that is the only month at 1%. Since these are winter months, the most likely reason for this dip in visitation is weather. For these same years, June and July were the most visited months with 4%. However, in 2012, May also had 4% in visitation. This suggests that more people travel to Virginia when the weather is moderate.

2014 experienced two trends. The first was lower visitation in winter, with 2% visitation during these months with the exclusion of December (Table A13). The second trend was even visitation every other month with 3% visitation. July was the only exclusion to this trend, as there was 2% visitation that month.

Appendix Table A11. 2012 Month of Travel	
January 2012	2%
February 2012	1%
March 2012	3%
April 2012	3%
May 2012	4%
June 2012	4%
July 2012	4%
August 2012	3%
September 2012	3%
October 2012	3%
November 2012	2%
December 2012	3%

Source: TNS Survey Results provided by Virginia Tourism Corporation

Appendix Table A12. 2013 Month of Travel	
January 2013	2%
February 2013	1%
March 2013	3%
April 2013	3%
May 2013	3%
June 2013	4%
July 2013	4%
August 2013	3%
September 2013	3%
October 2013	3%
November 2013	2%
December 2013	3%

Source: TNS Survey Results provided by Virginia Tourism Corporation

Appendix Table A13. 2014 Month of Travel	
January 2014	2%
February 2014	2%
March 2014	2%
April 2014	2%
May 2014	3%
June 2014	3%
July 2014	2%
August 2014	3%
September 2014	3%
October 2014	3%
November 2014	2%
December 2014	3%

Source: TNS Survey Results provided by Virginia Tourism Corporation

## Modes of Travel

Table A14 shows the average transportation used on a traveler's entire trip. In other words, if they traveled to other states, their mode of travel is included in this table. The most common mode of travel for leisure travelers visiting Virginia is a vehicle personally owned by the travelers. 82% of travelers come to Virginia by this method. The second most-used mode of travel to Virginia is by air. 14% of travelers use air travel to get here. Rental car is the third most-used mode of travel to the state, with 12% of travelers using this method. The other modes of travel fall at or below 5%.

The top modes three modes of travel are the same for primary mode of travel (Table A15). The most-used mode of travel is a traveler's own car or truck, with 77% of travelers using this method. 10% of travelers use a plane as their primary mode of travel, and 5% use a rental car. The other modes of travel all fall at or below 3%.

**Table A14. Modes of Travel Used on Entire Trip 2012-2014  
(all states visited)**

Q2A Own Auto/truck - All modes of transportation for trip	82%
Q2A Airplane- All modes of transportation for trip	14%
Q2A Rental car- All modes of transportation for trip	12%
Q2A Other - All modes of transportation for trip	5%
Q2A Train - All modes of transportation for trip	4%
Q2A Ship/Boat- All modes of transportation for trip	3%
Q2A Bus - All modes of transportation for trip	3%
Q2A Camper/RV- All modes of transportation for trip	2%
Q2A Motorcoach/Group Tour - All modes of transportation for trip	2%
Q2A Motorcycle - All modes of transportation for trip	2%

Source: TNS Survey Results provided by Virginia Tourism Corporation

**Table A15. Primary Mode of Travel  
Used on Entire Trip 2012-2014**

Own Auto/truck	77%
Airplane	10%
Rental car	5%
Other	3%
Camper/RV	1%
Bus	1%
Train	1%
Motorcycle	1%
Ship/Boat	less than
Motorcoach/Group Tour	less than

Source: TNS Survey Results provided by Virginia

### General Activities

The following table shows the various activities in which travelers to Virginia participate. Activities are divided into seven categories: Arts & Culture, Adventure Sports, Sports & Recreation, Nature & Outdoor Activities, Entertainment & Amusement, Family Activities, and Sightseeing. Participants could select as many answers as applied, so these activities all add up to more than 100%.

30% of respondents visit family while they were in Virginia, and 16% of travelers visit friends. These are the most-participated in activities, though they constitute a reason to come to Virginia more than an actual activity in which one can participate. For the purposes of this discussion,

activities are defined as something the travel party does while spending time together on their trip.

In looking at the other activities, the top five contain mostly heritage tourism endeavors. Shopping is the most popular activity, with 16% of participants going on a shopping trip during their stay. The next most popular activities are visiting historic sites and/or churches and rural sightseeing; both of these endeavors have 13% participation rate. 11% of respondents visit museums while in Virginia. 11% of respondents also enjoy fine dining on their stay. As the table shows, four of the top five activities are heritage tourism related.



**Table A17. General Activities / Attractions Visited in Virginia 2012-2014**

<b>Arts &amp; Culture</b>	
Q4H Activities/Attractions Visited - Historic sites/Churches	13%
Q4H Activities/Attractions Visited - Museums	11%
Q4H Activities/Attractions Visited - Old homes/mansions	5%
Q4H Activities/Attractions Visited - Art galleries	4%
Q4H Activities/Attractions Visited - Musical theater	2%
Q4H Activities/Attractions Visited - Theater/drama	2%
Q4H Activities/Attractions Visited - Local/folk arts/crafts	2%
Q4H Activities/Attractions Visited - Musical performance/show	2%
Q4H Activities/Attractions Visited - Symphony/opera/concert	1%
Q4H Activities/Attractions Visited - Native American ruins/Rock art	1%
<b>Adventure Sports</b>	
Q4H Activities/Attractions Visited - Hiking/Backpacking/Canyoneering	3%
Q4H Activities/Attractions Visited - Rock/mountain climbing	1%
Q4H Activities/Attractions Visited - Whitewater rafting/Kayaking/Canoeing/Paddleboarding	1%
Q4H Activities/Attractions Visited - Mountain biking	1%
Q4H Activities/Attractions Visited - Hang gliding/skydiving/base jumping	less than 0.5%
Q4H Activities/Attractions Visited - Scuba diving/snorkeling	less than 0.5%
Q4H Activities/Attractions Visited - Skiing/snowboarding	less than 0.5%
Q4H Activities/Attractions Visited - Water skiing	less than 0.5%
<b>Sports &amp; Recreation</b>	
Q4H Activities/Attractions Visited - Fishing	2%
Q4H Activities/Attractions Visited - Golf	2%
Q4H Activities/Attractions Visited - Sports events-Youth/Amateur/Collegiate/Other-spectator	2%
Q4H Activities/Attractions Visited - Biking/Road biking/Cycling	1%
Q4H Activities/Attractions Visited - Horseback riding	1%
Q4H Activities/Attractions Visited - Hunting	1%
Q4H Activities/Attractions Visited - Sports event-Major/Professional	1%
Q4H Activities/Attractions Visited - Motor boat/Jet Ski	1%
Q4H Activities/Attractions Visited - Motor sports - NASCAR/Indy	1%
Q4H Activities/Attractions Visited - Sailing	1%
Q4H Activities/Attractions Visited - Tennis	1%
Q4H Activities/Attractions Visited - Youth/amateur/collegiate sporting events (dropped in July	1%
Q4H Activities/Attractions Visited - ATV/Four-wheeling	1%
Q4H Activities/Attractions Visited - Sports events-Youth/Amateur/Collegiate/Other-participant	1%
Q4H Activities/Attractions Visited - Snowmobiling	less than 0.5%
Q4H Activities/Attractions Visited - Snow sports other than skiing or snowmobiling	less than 0.5%
Q4H Activities/Attractions Visited - Horseracing	less than 0.5%
<b>Nature / Outdoor Activities</b>	
Q4H Activities/Attractions Visited - Beach	10%
Q4H Activities/Attractions Visited - State park/Monuments/Recreation areas (added in July 2014)	9%
Q4H Activities/Attractions Visited - State/National Park (dropped in July 2014)	8%
Q4H Activities/Attractions Visited - National park/Monuments/Recreation areas (added in July	8%
Q4H Activities/Attractions Visited - Gardens	4%
Q4H Activities/Attractions Visited - Wildlife viewing	4%
Q4H Activities/Attractions Visited - Other nature	4%
Q4H Activities/Attractions Visited - Nature travel/Ecotouring	3%
Q4H Activities/Attractions Visited - Bird watching	2%
Q4H Activities/Attractions Visited - Camping	2%
Q4H Activities/Attractions Visited - Caverns	1%
Q4H Activities/Attractions Visited - Farms/ranches/Agri-tours	1%

Entertainment / Amusement	
Q4H Activities/Attractions Visited - Shopping	16%
Q4H Activities/Attractions Visited - Fine dining	11%
Q4H Activities/Attractions Visited - Theme park/Amusement park/Water park	4%
Q4H Activities/Attractions Visited - Special events/Festivals (e.g., Mardi Gras, hot air balloon races)	3%
Q4H Activities/Attractions Visited - Wine tasting/winery tour	3%
Q4H Activities/Attractions Visited - Casino/gaming	2%
Q4H Activities/Attractions Visited - Nightclub/dancing	2%
Q4H Activities/Attractions Visited - Zoos/Aquariums/Aviaries	2%
Q4H Activities/Attractions Visited - Craft breweries	2%
Q4H Activities/Attractions Visited - Spa/health club	1%
Q4H Activities/Attractions Visited - Distilleries	1%
Q4H Activities/Attractions Visited - Rodeo/State fair	less than 0.5%
Family Activities	
Q4H Activities/Attractions Visited - Visiting relatives	30%
Q4H Activities/Attractions Visited - Visiting friends	16%
Q4H Activities/Attractions Visited - Family reunion	3%
Q4H Activities/Attractions Visited - High School/College reunion	1%
Sightseeing	
Q4H Activities/Attractions Visited - Rural sightseeing	13%
Q4H Activities/Attractions Visited - Urban sightseeing	10%
Q4H Activities/Attractions Visited - Area where TV or movie was filmed	1%

Source: TNS Survey Results provided by Virginia Tourism Corporation

### Satisfaction with Travel to Virginia

The vast majority of travelers were very happy with their trip to Virginia (see Table A18). 48% of respondents are extremely satisfied with their trip, and 39% are very satisfied. These two responses combine to form 87% of respondents. 11% of respondents were somewhat satisfied, while 1% of respondents were not very satisfied and another 1% were not at all satisfied.

Table A18. Satisfaction With Experience in Virginia 2012-2014	
Extremely satisfied	48%
Very satisfied	39%
Somewhat satisfied	11%
Not very satisfied	1%
Not at all satisfied	1%

Source: TNS Survey Results

### Planning Time

The majority of respondents who travel to Virginia are not advance planners. Planning a trip consists of considering places and deciding definitely on places. Table A19 shows both planning phases. 28% of respondents consider where they want to travel two weeks ahead of time. 20% of respondents consider this one to three months ahead of time. These two time segments

comprise almost half of the respondents. There is a tie for the next most-considered time frame. 14% of respondents are considering destination two to four weeks ahead of time, and 14% of respondents are considering it three to six months before their trip.

The same four timeframes comprise the top three for decision time as well. 36% decide to visit Virginia two weeks before the visit. 19% of respondents decide from one to three months before they travel. The third spot is two to four weeks out, with 15% of respondents deciding in this time frame. 13% of respondents decide on their destination three to six months before they travel.

<b>Table A19. Advance Planning Time 2012-2014</b>	
<b>For Party to Consider Visiting Virginia</b>	
Less than 2 weeks before the visit	28%
At least 1 month, but less than 3 months before the visit	20%
Within 2 weeks - 4 weeks of visit	14%
At least 3 months, but less than 6 months before the visit	14%
At least 6 months, but less than 1 year before the visit	13%
More than a year before the visit	11%
<b>When Party Decided to Visit Virginia</b>	
Less than 2 weeks before the visit	36%
At least 1 month, but less than 3 months before the visit	19%
Within 2 weeks - 4 weeks of visit	15%
At least 3 months, but less than 6 months before the visit	13%
At least 6 months, but less than 1 year before the visit	11%
More than a year before the visit	7%

Source: TNS Survey Results provided by Virginia Tourism Corporation

Table A20 shows the sources people utilize when planning their vacation. It divides respondent answers into offline and online sources for seeking information on their upcoming trip. Visitors tend to rely on their own experience the most, with 30% of respondents doing so. Friends and family members supply the next most-utilized source of information, with 22% of respondents seeking advice from people they know. Search engines follow third, with 11% of respondents seeking information on the internet. 10% of respondents follow-up their search by seeking information on a website representing their destination. The top responses are balanced between offline and online sources, as people tend to use both.

Table A20. Planning Information Sources for Virginia 2012-2014	
<b>Offline Sources</b>	
Own experience	30%
Friends/relatives	22%
Travel club (e.g. AAA)	5%
Travel book	4%
Destination printed material	4%
Travel provider (airline, hotel, rental car cruise, etc.) either in person or by phone	2%
Travel agent (in person or by phone)	1%
Corporate travel department (in person or by phone)	1%
Newspaper	1%
Magazine	1%
TV	1%
Radio	1%
Other offline planning sources	1%
<b>Online Sources</b>	
Search engines (Google, Bing, Yahoo, etc.)	11%
Destination website	10%
Travel provider website (airline, hotel, rental car, cruise, tour)	9%
Online full service travel website (Expedia, Travelocity, etc.)	6%
Other online planning sources	3%
Facebook	3%
iPhone	3%
Travel review sites (TripAdvisor, Yelp, etc.)	3%
TripAdvisor	2%
Mobile Web Browsing	2%
Corporate desktop travel tool/intranet	1%
Traditional travel agency website (American Express, Carlson Wagonlit, etc.)	1%
Twitter.com	1%
Blogs	1%
MySpace	less than 0.5%
LinkedIn	less than 0.5%
Match.com	less than 0.5%
Yahoo Trip Planner	less than 0.5%
VibeAgent	less than 0.5%
Other social/commercial networking sources (Specify)	less than 0.5%
Other mobile sites	less than 0.5%
Pinterest	less than 0.5%
Online forums	less than 0.5%
<b>Other</b>	
No plans were made for this destination	32%
Someone else planned for me and I don't know the method	8%

Source: TNS Survey Results provided by Virginia Tourism Corporation

Table A21 shows booking methods the respondents used for their Virginia trip. 55% of people did not make a booking for this trip. This is probably because of the number of respondents who either used their own vehicle or stayed with friends or family members. 10% of respondents used a travel provider website for either their mode of travel or their lodging choice, comprising the highest percentage of a booking method used. The next highest booking method was another party; 9% of respondents have someone else book their travel. This could be another member of their party, a travel agent, or someone else. This information is not provided. 6% of

respondents go directly to the source in booking their lodging or travel mode. These respondents make their reservations directly with the airline, hotel, rental car agency or other similar party.

<b>Table A21. Booking Methods Used for Virginia 2012-2014</b>	
<b>Offline Methods</b>	
Directly with travel provider (airline, hotel, rental car, cruise, etc.) either in	6%
Directly with destination or attraction (tourist/visitor center, etc.) in person or by	5%
Travel club (e.g. AAA)	2%
Corporate travel department (in person or by phone)	2%
Travel agent (in person or by phone)	1%
Some other offline booking method	1%
<b>Online Methods</b>	
Travel provider website (airline, hotel, rental car, cruise, tour)	10%
Online full service travel website (Expedia, Travelocity, etc.)	7%
Destination website (official site of state, city or attraction)	4%
Some other online booking method	3%
Corporate desktop travel tool/internet	2%
Traditional travel agency website (American Express, Carlson Wagonlit, etc.)	1%
<b>Other</b>	
No bookings were made for this destination	55%
Someone else booked for me and I don't know the method	9%
Unsure, I just used link from social/commercial networking or mobile source (such as MySpace, Facebook, Trip Advisor, etc.)	1%

Source: TNS Survey Results provided by Virginia Tourism Corporation

### Other States and Destinations

Table A22 shows other states respondents visited in the previous 12 months prior to their trip to Virginia. 30% of respondents also traveled to North Carolina, and 29% of respondents traveled to Washington DC. The third most visited state was Maryland, with 28% of respondents traveling there within the last year. These destinations are in adjacent locations, so visitors do not need to travel far to get to them.

**Table A22. Top 10 Other States Visited for Leisure in Past 12 Months 2012-2014**

North Carolina	30%
Washington D.C.	29%
Maryland	28%
Pennsylvania	26%
Florida	25%
New York	20%
South Carolina	19%
West Virginia	18%
Georgia	17%
New Jersey	15%

Source: TNS Survey Results provided by Virginia Tourism

When respondents travel to multiple states, they likewise stay nearby (see Table A23). 35% only travel to Virginia. North Carolina and Maryland both have 7% of respondents traveling to them, and Pennsylvania, West Virginia, and Washington DC all have 5% of respondents traveling there.

**Table A23. Top 15 States Visited on Same Trip 2012-2014**

Virginia	35%
North Carolina	7%
Maryland	7%
Pennsylvania	5%
West Virginia	5%
Washington D.C.	5%
South Carolina	4%
Georgia	4%
Tennessee	3%
New York	3%
Florida	3%
New Jersey	2%
Delaware	2%
Ohio	2%
Kentucky	1%

Source: TNS Survey Results provided by Virginia Tourism Corporation

Table A24 shows where the respondents plan on traveling in the two years following their participation in the survey. 9% planned on remaining in Virginia. 7% plan to travel to Florida. Florida is a popular winter destination, so this might explain the dip in visitation to Virginia in the



winter months in Tables A11 through A13 above. North Carolina was the third choice of destination, with 6% of respondents planning to travel there. Washington DC and New York shared the fourth most chosen place to visit, with 5% of respondents planning on traveling to those destinations.

**Table A24. Top 10 Other States Plan to Visit for Leisure in Next 2 Years 2012-2014**

Virginia	9%
Florida	7%
North Carolina	6%
Washington D.C.	5%
New York	5%
Pennsylvania	4%
South Carolina	4%
Maryland	4%
California	3%
None	3%

Source: TNS Survey Results provided by Virginia Tourism

TNS also collected data on “Designated Marketing Areas.” Virginia advertises in these destinations, and this table reports the success of the marketing efforts in drawing people to Virginia. 14% of travelers come from nearby Washington DC (see Table A25). 6% of travelers come from multiple in-state destinations and travel within Virginia. These respondents are from the Norfolk/Portsmouth/Newport News area and from the Richmond/Petersburg area; each of these areas contribute 6% of respondents. New York also sends 6% of respondents to Virginia.

**Table A25. Travel Party Origin - Top 10 Designated Marketing Areas for the profiled travel segment 2012-2014**

Washington, DC (Hagerstown)	14%
Norfolk-Portsmouth-Newport News	6%
Richmond-Petersburg	6%
New York	6%
Roanoke-Lynchburg	5%
Raleigh-Durham (Fayetteville)	3%
Philadelphia	3%
Baltimore	3%
Greensboro-High Point-Winston Salem	2%
Atlanta	2%

Source: TNS Survey Results provided by Virginia Tourism Corporation

## **Appendix 2: List of Heritage Tourism Sites considered for this study**

### **A2. List of Heritage Sites Considered for this Study**

1708 Gallery

1750 Isle of Wight Courthouse

African American Historical Society of Portsmouth

Agecroft

Albemarle Charlottesville Historical Society

Aldie Heritage Assoc

Aldie Mill

Amazement Square

American Civil War Center at Historic Tredegar

American Civil War Museum

Amherst County Museum & Historical Society

Artisan Center of Virginia

Arts Center in Orange, Inc

Arts Depot

artspace

Ashland Museum

Augusta County Historical Society

Avoca Museum & Historical Society

Bacon's Castle

Ball Museum

Bath County Historical Society

Bear Creek Lake State Park

Beaverdam Depot

## A2. List of Heritage Sites Considered for this Study (continued)

Bedford City County Museum

Belle Isle State Park

Birthplace of Country Music Museum

Biscuit Run

Blacksburg Museum & Cultural Foundation

Bland County Historical Society

Blue Ridge Center for Environmental Stewardship

Blue Ridge Institute & Museum of Ferrum College

Botetourt County Historical Society and Museum

Brandy Station Foundation

Caledon Natural Area

Camera Heritage Museum

Cape Charles Historical Society

Cape Henry Lighthouse

Captain Timothy Hill House

Casemate Museum at Fort Monroe Authority

Cedar Creek Battlefield Foundation

Center for the Arts of Greater Manassas

Chantilly Farm

Chesapeake & Ohio Historical Society

Chesterfield Historical Society of Virginia

Chippokes Plantation

Chrysler Museum of Art

Clarke County Historical Association Museum and Archives

## A2. List of Heritage Sites Considered for this Study (continued)

Claytor Lake State Park

Cold War Museum

Collingwood Library and Museum on Americanism

Colonial Williamsburg Foundation

Commonwealth Coach and Trolley Museum

Crab Orchard Museum

Crooked Road

Crossing of the Dan

Cultural Arts Center at Glen Allen

Dahlgren Heritage Museum

Daniel Boone Wilderness Trail

Danville Museum of Fine Arts & History

Danville Service Center

D'Art Center

Del Ray Artisans/Arts Resource Foundation

Deltaville Maritime Museum

Douthat State park

Eastern Shore of VA

Edgar Allan Poe Museum

Edith & Theodore Roosevelt Pine Knot Foundation

Edith Bolling Wilson Birthplace Foundation

Eleanor D. Wilson Museum at Hollins University

Endview Plantation/Lee Hall Mansion

Essex County Musuem

## A2. List of Heritage Sites Considered for this Study (continued)

Fairfax County Park Authority

Fairfax Museum and Visitor Center

Fairfax Station Railroad Museum

Fairy Stone State Park

False Cape State Park

Fauquier Heritage Society

Fine Arts Center for the New River Valley

First Landing State Park

Floyd County Historical Society and Museum

Fluvanna County Historical Society

Folk Art Society of America

Fort Ward Museum

Franklin County Historical Society

Freeman House Store & Museum

Friends of Wilderness Battlefield

Frontier Culture Museum

Gadsby's Tavern Museum

Gari Melchers Home and Studio

George C. Marshall Museum

George Washington Masonic National Memorial

Grand Lodge of Virginia AF&AM Library, Museum and Historical Foundation  
and its Allen E. Roberts Library and Museum

Grayson County Historical Society

Grayson Highlands State Park

## A2. List of Heritage Sites Considered for this Study (continued)

Greater Reston Arts Center

Greene County Historical Society Museum and Rhodes Wildlife Art Gallery

Gum Springs Museum & Cultural Center

Gunston Hall

Gwynn's Island Museum

Hampton History Museum

Hanover Tavern Foundation

Harrison Museum of African American History

Harrisonburg Children's Museum

Hatton Ferry

Heartwood

Henricus Foundation

Heritage Farm Museum

High Bridge State Park

Highland Museum and Heritage Center

Historic 1908 Courthouse

Historic Christ Church

Historic Crab Orchard Museum & Pioneer Park

Historic Fairfax City

Historic Fredericksburg Foundation

Historic Gordonsville

Historic Hopewell Foundation

Historic Prince William



## A2. List of Heritage Sites Considered for this Study (continued)

Historic Sandusky  
Historic St. Luke's Church  
Historic Staunton Foundation  
Historical Society of Washington County, VA  
Historical Society of Western VA  
History Museums of Virginia beach  
Holiday Lake State Park  
Hungry Mother State Park  
Isle of Wight Arts League  
Isle of Wight County Museum  
Ivy Creek Foundation  
James Madison's Montpelier  
James Monroe Memorial Foundation  
James River State Park  
Jamestown-Yorktown Foundation  
Jewish Museum and Cultural Center  
John J. Wright Educational and Cultural Center Museum  
Journey Through Hallowed Ground National Heritage Area  
Ker Place, Eastern Shore Historical Society  
Kernstown Battlefield Association  
Kig and Queen County Historical Society  
Kiptopeke State Park  
L.E. Coleman African American Musuem  
Lake Anna State Park

## A2. List of Heritage Sites Considered for this Study (continued)

Leander McCormick Observatory at the University of Virginia

Lee Conty Historical

Leesylvania State Park

Library of Virginia Foundation

Loudoun Museum

Louisa County Historical Society

Lynchburg Historical Foundation

Lynchburg Museum System

MacCallum More Museum and Gardens

Mariner's Museum

Martinsville-Henry County Historical Society

Mason Neck

Mathews Maritime Foundation

Matthews Living History Farm Museum

Maymont

McGhee Foundation

McLean Project for the Arts

Memorial Foundation of the Germanna Colonies, Inc.

Menokin

Middle Peninsula State Park

Middlesex County Museum and Historical Society

Military Aviation Museum

Miller-Kite House Museum

Montgomery Museum & Lewis Miller Regional Art Center

## A2. List of Heritage Sites Considered for this Study (continued)

Monticello-Thomas Jefferson Foundation  
Montpelier Center for the Arts & Education  
Montpelier Foundation  
Morattico Waterfront Museum  
Morven Park  
Muscarelle Museum of Art  
Museum of Bags  
Museum of Culpeper History  
National D-Day Museum  
National Museum of Americans in Wartime  
National Museum of the Marine Corps  
National Museum of the U.S. Army  
National Skydiving Museum  
National Sporting Library  
National Women's History Museum  
Natural Bridge  
New River Trail  
Norfolk Botanical Garden  
Norfolk Historical Society  
Norfolk Public Library  
Northern Neck Farm Museum  
Northern Neck Historical Society  
Northumberland County Historical Society  
Oaconeechee

## A2. List of Heritage Sites Considered for this Study (continued)

Old Coast Guard Station Museum

Patrick Henry's Red Hill

Patrick Henry's Scotchtown

PFAC

Piedmont Arts

Pocahontas

Poquoson Historical Cultural Museum

Portsmouth Museums

Powhatan State Park

Prince George Regional Heritage Center

Prince William County Historic Site

Rappahannock Historical Society

Rawls Museum Arts

Reedville Fishermen's Museum

Reston Historic Trust

Reynolds Homestead

Rice's Hotel/Hughlett's Tavern

Richmond Forum

Richmond Railroad Museum

Riddick's Folly House Museum

Rockbridge Historical Society

Rockfish Valley Foundation Natural History Center

Rosewell

Round the Mountain

## A2. List of Heritage Sites Considered for this Study (continued)

Sailor's Creek Battlefield

Salem Museum and Historical Society

Sanders House Charitable Trust

Schoolfield Museum and Cultural Center

Science Museum of Virginia

Science Museum of Western Virginia

Scrabble School

Second Street Gallery

Sedalia Center

Seven Bends

Shenandoah County Historic Courthouse Museum & Visitor Center

Shenandoah River State Park

Shenandoah Valley Art Center

Shenandoah Valley Cultural Heritage Museum

Shirley plantation foundation

Sky Meadows

Smith Mountain Lake State Park

Smith's Fort Plantation

South Boston-Halifax County Museum of Fine Arts

Southampton County Historical Society

Southwest Virginia Museum Historical State Park

Spotsylvania County Museum

St. John's Church Foundation

Staunton Augusta Art Center

## A2. List of Heritage Sites Considered for this Study (continued)

Staunton River Battlefield  
Staunton River State Park  
Stratford Hall  
Suffolk Art League  
Suffolk-Namesemond Historical Society  
Tangier History Museum  
Target Gallery Torpedo Factory  
Taubman Museum of Art  
The Art League  
The George Washington Foundation  
The Heritage Museum/Harrisonburg-Rockingham  
The John Marshall House  
The Museum at Colonial Beach  
The Museum of Valor  
The Valentine Museum  
Twin Lakes State Park  
U.S. Army Quartermaster Museum  
VA Air & Space Center  
VA Discovery Museum Charlottesville  
VA Historical Society  
VA Repertory Theatre  
VA Sports Hall of Fame  
VA War Memorial Education Foundation  
VA Zoological Park



## A2. List of Heritage Sites Considered for this Study (continued)

Valley Brethren Mennonite Heritage Center

Vietnam War Foundation and Museum

Virginia Beach History Museums

Virginia Capital Trail

Virginia Capitol Foundation

Virginia Civil War Trails

Virginia Holocaust Museum

Virginia Institute of Marine Science

Virginia Living Museum

Virginia Museum of Contemporary Art

Virginia Museum of Fine Arts

Virginia Museum of Transportation

Virginia Quilt Museum

Visual Arts Center of Richmond

VMI Museum

Walton's Mountain Museum

Warren Heritage Society

Warren Rifles Confederate Memorial Museum, Inc.

Washington Heritage Museums

Waterford Foundation, Inc.

Watermen's Museum

Waynesboro Heritage Foundation

Weems=Botts

Westmoreland County Museum and Library

## A2. List of Heritage Sites Considered for this Study (continued)

Westmoreland State Park

White's Mill

Wilderness Road State Park

William King Museum of Art

Wise County Historical Museum

Wolf Creek Cherokee Tribal Center and Museum

Wolf Creek Indian Village

Woodrow Wilson Presidential Library

Woodstock Museum of Shenandoah County

Workhouse Arts Center

Workhouse Prison Museum at Lorton

York River State Park

\*Thanks to the Virginia Association of Museums for providing a comprehensive list of heritage museums and sites.

### **Appendix 3 - Heritage Tourism Survey**

Preservation Virginia provided a list of sites they wanted to include in the study, which CURA used as a basis for selecting which sites to send surveys.

#### **MA1. Cover Letter Distributed to Sites for Completion of Survey**

To Facility/Site Director or Manager:

The Center for Urban and Regional Analysis at Virginia Commonwealth University (CURA @ VCU), through the sponsorship of Preservation Virginia and with technical assistance from Virginia Tourism Corporation (VTC) and the Virginia Association of Museums (VAM), is conducting a study to estimate the economic impact of Heritage Tourism in the Commonwealth of Virginia. Heritage tourism is a segment of tourism that centers on the unique history and culture of a place.

A crucial component of this study is a survey of historic museums and tourist sites that are part of the heritage tourism network of Virginia. It is a short survey and shouldn't take much of your time. We ask that the facility director or manager of your facility complete this survey by Friday, October 30. The information you share with us will be completely confidential. All data collected will be aggregated so that your responses cannot be identified. If additional sites fall under the same management, please send the survey link to the additional sites and complete a separate survey for each site.

This data will be used to understand the contribution of heritage tourism to the economy of Virginia. Your participation is very important, as is your accuracy (questions on budget expenditures, in particular, are of crucial importance for this research process). These results could possibly lead to an increased focus on tourism in Virginia, which could take the form of advertising, grants, or higher visibility for historic sites and museums.

If you have questions about the survey or the study, please contact the CURA research team at: [cura@vcu.edu](mailto:cura@vcu.edu).

Thank you for your time and assistance in completing this questionnaire for your facility/site.  
Sincerely,

Elizabeth S. Kostelny  
Executive Director, Preservation Virginia  
204 West Franklin Street  
Richmond, VA 23220

John Accordino, PhD  
Director, Center for Urban and Regional Analysis (CURA @ VCU)  
921 W. Franklin St.  
Richmond, VA 23284

## MA2. Heritage Tourism Survey Distributed to Heritage Tourism Sites

### **Contact Information**

Facility/Site

Name:

### **Visitation, Staff, and Budget Information**

1. How many people visited your facility/site in 2014? (an estimation is fine) \_\_\_\_\_
2. How has visitation to your facility/site changed since 2005?  
\_\_\_\_\_ Increased \_\_\_\_\_ Decreased \_\_\_\_\_ Stayed same \_\_\_\_\_ Don't know
3. How has revenue changed since 2005?  
\_\_\_\_\_ Increased \_\_\_\_\_ Decreased \_\_\_\_\_ Stayed same \_\_\_\_\_ Don't know
4. Do you have volunteer workers at your facility/site?  
\_\_\_\_\_ Yes \_\_\_\_\_ No \_\_\_\_\_ Don't know
5. How many volunteers work at your facility/site? (an estimation is fine) \_\_\_\_\_
6. How many paid workers do you have at your facility/site (yourself included)?  
Full-time: \_\_\_\_\_ Part-time: \_\_\_\_\_
7. What were the total expenditures of your facility/site during your most recently completed budget year? (an approximate \$ figure is fine) \_\_\_\_\_
8. Does the total amount of expenditures that you entered in the previous question represent an increase or a decrease compared to the previous year?
9. \_\_\_\_\_ Increase \_\_\_\_\_ Decrease \_\_\_\_\_ Stayed same \_\_\_\_\_ Don't know
10. For your most recently completed budget year, what were your expenditures in the following categories?

Note: a value of \$0 for one or more categories is acceptable, if that is accurate.

- a. Payroll and benefits for all paid workers

\$ \_\_\_\_\_

General and administrative (*general office expenditures, membership, insurance, etc.*)

\$ \_\_\_\_\_

- b. Professional services (*marketing, public relations, law, insurance, architecture/design, landscaping, etc.*)

\$ \_\_\_\_\_

- c. Retail, lodging, and restaurant (*wholesale, catering, hotel expenses, etc.*)

\$ \_\_\_\_\_

- d. Facilities maintenance and utilities (*maintenance, heat/air conditioning, capital improvements, etc.*)

\$ \_\_\_\_\_

- e. Program expenses (*acquisitions, conservation, curatorial, audio/visual, entertainment, etc.*)?

\$ \_\_\_\_\_

11. What do your visitors say brought them to your facility/site? (check all that apply):

\_\_\_\_\_ Visit friends/relatives

\_\_\_\_\_ Outdoor recreation

\_\_\_\_\_ Other leisure travel reasons

\_\_\_\_\_ Personal business

\_\_\_\_\_ Business purposes/Professional travel

\_\_\_\_\_ Other

12. Does your site administer surveys of your visitors?

\_\_\_\_\_ Yes \_\_\_\_\_ No \_\_\_\_\_ Don't know

13. Do you actively promote your facility/exhibits?

\_\_\_\_\_ Yes \_\_\_\_\_ No \_\_\_\_\_ Don't know

14. Which of the following would you would find useful for your facility/site?

Technical Assistance/Training (with using computers, social media, web sites, etc.)

\_\_\_\_\_ Yes \_\_\_\_\_ No \_\_\_\_\_ Don't know

Marketing Assistance (with ad placement and/or design, target market research, public relations, etc.)

\_\_\_\_\_ Yes \_\_\_\_\_ No \_\_\_\_\_ Don't know

Grants/Financial Aid

\_\_\_\_\_ Yes \_\_\_\_\_ No \_\_\_\_\_ Don't know

Wayfinding signage to your facility/site

\_\_\_\_\_ Yes \_\_\_\_\_ No \_\_\_\_\_ Don't know

Other, please specify: \_\_\_\_\_

15. Name of person filling out this survey: \_\_\_\_\_

16. Email Address (optional): \_\_\_\_\_



## **Appendix 4 – Focus Group Protocol**

Two or Three Sessions: (1) Heritage Tourism Site Directors / Staff, (2) Local government & other public sector officials, (3) Local businesses, residents and other stakeholders. [Combine 2 and 3 if total of either session is three persons or less.]

Focus group results will be aggregated and comments will be reported without names or identifying features. We will take names during the sessions, but only to help us organize the notes.

This draft includes all questions to be asked of all three groups. When we conduct the groups we will focus certain questions on certain groups.

- (1) Please describe your professional role and the role(s) you play in heritage tourism.
- (2) Describe the heritage tourism assets relevant to this region – facilities, services, events, etc.
- (3) Describe the extent to which any of these assets/facilities work jointly (e.g., events, regional marketing, etc.).
- (4) Who are the users of these facilities / who comes to the events, etc.?
  - a. Demographic characteristics
  - b. Where they reside
  - c. How long they stay
  - d. Why they come
  - e. What they do while visiting the region
- (5) Describe the economic and social impacts of these heritage tourism assets on the region:
  - a. Economic – on commercial businesses, on investment or location of new businesses, new residents, on the vitality of the region, in general.
  - b. Social – how, if at all, these assets and the activities associated with them have had broader social impacts or on perceptions of the community by residents or other stakeholders (e.g., public safety, community vitality in general)
- (6) Are there any other ways in which these heritage tourism assets benefit the region?
- (7) What would be the consequences for the community and region, if these heritage tourism assets were to close or move away?
- (8) What is the relationship of the assets/facilities to local and state government? Do the facilities receive contributions? Do the facilities pose costs (either directly or by attracting visitors) that the town or other local organizations absorb?
- (9) How, if at all, could the heritage tourism assets have an even greater impact on the community and region?