Eastern Shore Regional Section

Introduction

As a supplement to the Virginia State Tourism Plan, this section is dedicated to the Eastern Shore region. ***It is strongly suggested that the Virginia State Tourism Plan be read in conjunction with this regional section.***

The key elements of this regional section include the following:

- A situational analysis of tourism in the region, which highlights the key tourism products, regional strengths and challenges, competitive considerations, and other relevant information, is presented to set the framework for the regional strategy.
- Key product themes of focus are identified and applicable objectives and strategies are presented for the five plan outcomes of Products, Pillars (infrastructure), Partnerships, Promotions, and Policies for the Eastern Shore tourism strategy.
- Action steps specific to the region, which are above and beyond the actions of the state level plan are outlined.
- Stakeholders proposed to be involved in implementing the plan are also identified.
- Key takeaways for the Eastern Shore's tourism development in the next five years are outlined.

Process for Findings

Numerous factors formed the basis of the Eastern Shore's tourism strategy, including the tourism industry's own vision for the region, an inventory and analysis of the tourism assets currently offered, input and analysis of visitor information, and an analysis of the competitive environment. These four key areas are further described below:

Industry Vision: The industry vision served as the foundation for the region's strategy, based on input from approximately 1,300 responses statewide, including stakeholders from the Eastern Shore through workshops, surveys, and discussions. The overwhelming desire among Eastern Shore stakeholders is to utilize the region's natural assets and further develop outdoor recreation in an authentic and sustainable manner, while also building upon the region's other tourism attributes.

Tourism Assets: The Eastern Shore's tourism assets were analyzed by the study team. This included the current mix of tourism products such as attractions, visitor activities, hotel inventory, natural assets and topography, industry base, and socio-cultural character. The strengths and challenges of the region's current characteristics such as infrastructure, road/air accessibility, partnerships, policies, and promotions were also

discussed with numerous key stakeholders and assessed. In addition to the study team's personal experience of the Eastern Shore, other input contributed to an understanding of the existing tourism assets, including input from tourism stakeholders, VTC databases, local tourism marketing information/promotional information from organizations such as the Eastern Shore Tourism Commission and chambers of commerce, existing tourism plan of the Eastern Shore Tourism Commission, tourism industry associations, tourism industry resources, PwC resources, and others.

Consumer Perspective: Research was analyzed on a global, national, state, and regional level. This research included visitor trends, activities, perceptions/preferences, performance indications, and emerging elements. Macro trends impacting tourism such as population and demographic trends, GDP/GSP, unemployment rates, consumer prices, personal consumption spending, gas prices, and other factors impacting tourism in a broad sense were also analyzed.

Sources of research related to Virginia and Eastern Shore compiled by the VTC were analyzed, which included profiles of past visitors (by traveler type, geography, season, and activity), traveler attitude studies, and other data. Profiles of past visitors (statewide) showed activities engaged in which are offered on the Eastern Shore, seasonality, party size, spending, demographics, income levels, travel distance and patterns, duration of trip, travel party origin, and other relevant information. Attitude studies of past and prospective travelers provided additional insight for the Eastern Shore in terms of appeal, perceptions of tourism products, activities, and destination attributes as well as other relevant hub and spoke travel behavior and activities. Visitor data was also analyzed against existing tourism assets.

Visitor insights show that the Eastern Shore has a high favorability rating among past and prospective travelers, particularly among higher income earners. It was highly rated for being relaxing, good for families, its overall atmosphere, and outdoor recreation. The region was also recognized by most for possessing warm/sunny beaches, being great for scenic drives, great for boating/sailing, and having interesting small-towns and villages among others. Nearly half of past and prospective visitors also recognized the region for unique/local cooking.

Additional state/regional sources included data on visitor spending patterns based on economic impact data in the region, state parks attendance, welcome center statistics, the 2011 Wallops Island Economic Value Study, Weldon Cooper Center for Public Service, the Virginia Shellfish Aquaculture Situation and Outlook Report, and other sources. Examples of national and international sources include data from the United Nations World Tourism Organization, U.S. Travel Association, Office of Travel & Tourism Industries (OTTI), MMGY Global, Outdoor Industry Association, U.S. Culture and Heritage Travel Council, National Trust for Historic Preservation, World Food Travel Association, National Parks Service, Smith Travel Research (STR), America's Byways, Woods & Poole, other U.S. government sources, travel industry publications and articles, and other relevant sources.

Competitive Perspective: To understand the offering and competitive positioning of Virginia and the Eastern Shore region, research and analysis was conducted which evaluated destinations, product offerings, market segments, and key strengths of competition on a regional basis, and

analysis of products, tourism spending, product rankings, and best practices and trends in tourism product areas on a statewide/national basis. For the Eastern Shore, the coastal areas of Maryland, North Carolina, and Delaware were analyzed. More specifically, areas of those states were analyzed for key product strengths and included Maryland's Eastern Shore with the shared Assateague Island, North Carolina's Outer Banks, and the Delaware coast. These states, in a number of ways, offer similar relaxing experiences such as beaches, outdoor recreation, and coastal towns each with their own culture and heritage, including arts, water-oriented culture, and history ranging from Native American to aviation. These other destinations have a mixture of natural and commercial coastal features, whereas Eastern Shore has the appeal of being less developed. Maryland also claims Assateague Island with beaches, nature, and ponies as a tourism asset, and Outer Banks aggressively promotes its natural beaches and coastal experiences.

Sources of this competitive information included, but were not limited to, review of tourism marketing websites/promotional information, tourism marketing and strategic plans, tourism organization annual reports, tourism industry publications and articles, rankings, available consumer-oriented research (statewide) which addresses competition, and tourism companies (outfitters, tour guides, etc.).

Tourism Situation

The Eastern Shore is surrounded by the Chesapeake Bay on the west and the Atlantic Ocean on the east. The peninsula is accessible from Maryland in the north and from the Hampton Roads region from the south via the Chesapeake Bay Bridge-Tunnel. The bridge serves as a gateway to the peninsula and helps to create sense of distinction into a new destination. With its vast water presence, the region is rich with natural beauty and unspoiled coastline.

With two counties, Accomack County in the north and Northampton County in the south, the population totals 45,500 residents, the least populous of all tourism regions. With limited population, the region has a challenged economic base.

The Eastern Shore is an emerging tourism region, accounting for approximately $224 million in travel and tourism expenditures in 2011 (approximately one percent of the state's overall travel and tourism expenditures), which is an increase of 13.4 percent since 2007, the second largest increase of all the tourism regions. The Eastern Shore of Virginia Tourism Commission serves as a regional organization focused on tourism marketing, along with county level tourism marketing initiatives and broader regional participation in the Coastal Virginia Tourism Alliance. Collaboration among Accomack County and Northampton County is an area of ongoing improvement. Some residents of the region have a "from here" versus "come here" mindset, which may hinder tourism development efforts with some residents protective of authenticity and reluctant to change.

Nature and outdoor recreational opportunities are visitor strengths for the region, offering visitors scenic and relaxing getaways, described by many as a "step back in time." Notable outdoor assets include Assateague Island National Seashore, Chincoteague National Wildlife Refuge, Eastern Shore of Virginia and Fisherman Island National Wildlife Refuge, Kiptopeke State Park, and the Virginia Birding and Wildlife Trail. These assets and trails offer visitors the opportunity to hike, bike, horseback ride, observe wildlife, hunt, fish, kayak, and canoe. However, as with other

Regional Facts:

- Region Population: 45,500
- Largest County: 33,000
- Bodies of Water: Chesapeake Bay, Atlantic Ocean
- 2011 Tourism Expenditures: $224 million
- 2007-11 Expenditure Growth: 13.4%

coastal destinations, seasonality is a challenge for the region.

Visitor insights show that the Eastern Shore has a high favorability rating among past and prospective travelers, particularly among higher income earners. It is highly rated for being relaxing, good for families, its overall atmosphere, and outdoor recreation. The region was also recognized by most for possessing warm/sunny beaches, being great for scenic drives, great for boating/sailing, and having interesting small-towns and villages among others. Nearly half of past and prospective visitors also recognized the region for unique/local cooking. In addition, while boating and fishing were also recognized for outdoor recreation, other outdoor elements such as paddle sports and biking were not as prominent in visitors' minds despite offering of these activities on the shore. The majority of visitors to Virginia are likely to visit an ocean beach on a future vacation.

While there are a number of water-oriented natural assets, direct access to water experiences is somewhat limited and not readily available. For example, the Shore's barrier islands must be accessed largely by guides. Also, public beach access is only available at Kiptopeke State Park, Cape Charles Beach, and in Chincoteague; however, a proposed controversial plan places limitations on Chincoteague's direct beach access that has the potential to negatively impact tourism.[1]

While nature-related opportunities dominate the region, there are many notable towns such as Cape Charles, Wachapreague, Onancock, and Chincoteague, home of the nationally known Chincoteague Pony Swim event. Tangier Island also offers visitors a unique step back in time to an isolated crabbing village in the Chesapeake Bay. Cape Charles is an example of a community that continues to evolve with the Bay Creek Resort and Arnold Palmer and Jack Nicklaus golf courses. The region is also emerging with its wineries, arts, agri-tourism, and aqua-tourism, including growing oyster farms.

Highlights of Regional Lures/Strengths:

- Scenic Beauty and Outdoor Recreation Opportunities
- Natural Assets: Chesapeake Bay, Atlantic Ocean, Assateague Island National Seashore, Chincoteague National Wildlife Refuge, Eastern Shore of Virginia and Fisherman Island National Wildlife Refuge, Kiptopeke State Park
- Notable Cities & Towns: Onancock, Cape Charles, Chincoteague, Wachapreague, Tangier Island
- Potential for space-related tourism (Wallops Island)
- Aquaculture

Regional Challenges:

- Limited direct access to water experiences
- Limited recognition of assets and towns
- Lack of tourism industry maturity
- Differentiation from competition in nearby states - coastline and outdoors
- Limited accommodations
- Limited accessibility - toll bridge, entry points, air
- Limited regional collaboration
- Challenged economic base
- Coastal seasonality
- Image as pass-through destination - limited water visibility

[1] It should be noted that this plan was developed prior to Hurricane Sandy, and the full impact on tourism assets such as the future of the beach at Chincoteague were unknown at the time of plan release.

Given its coastal location combined with its waterman culture, the Eastern Shore is a prime location for aqua-tourism, including oyster farms and clamming. For the state, aquaculture has been a benefit for the economy. Since 2005, the number of oysters planted by Virginia aqua-culturists has grown from 6.2 million to 65.5 million in 2011. In the region, visitors may experience kayak clamming tours or oyster farms, including Tom's Cove Aquafarms, Cherrystone Aqua Farms, Shooting Point Oyster Company, and Old Plantation Oyster Company to name a few. Competitively, Maryland's aqua-tourism has become more organized in recent years with new licensing programs and promotions. However, coastal areas of Delaware and North Carolina do not appear as active in the area of aqua-tourism (excluding fishing).

With NASA's presence at Wallops Island and the Mid-Atlantic Regional Spaceport, the Eastern Shore has the opportunity to leverage space-related tourism. Space launches are an attraction for visitors and residents that is an ongoing tourism opportunity that can bring in tourists and spark ancillary development. There is also an economic development opportunity to attract space-related businesses to the area. However, Maryland already has an economic development strategy in place to attract space-related and defense businesses to the Wallops Island area and leverage its own assets in Maryland related to space, science, and technology.

In terms of accommodations, the region appears under-supplied (with two percent of the state's hotel supply according to STR). The region's economy and mid-scale chains entirely comprise the chain properties (excluding independent hotels), indicating the lack of upscale (and higher-rated) chain properties, which are typically full-service hotels. However, Bay Creek Resort offers upscale vacation rentals. In addition, the region is home to over 30 B&Bs and inns that expand lodging options for visitors.

Despite the nature and outdoor opportunities in the region, a challenge for the region is differentiation from nearby coastal destinations. It faces strong regional competition from states offering similar visitor experiences such as Maryland, North Carolina, and Delaware. These states, in a number of ways, offer similar relaxing experiences such as beaches, outdoor recreation, and coastal towns each with their own culture and heritage, including arts, water-oriented culture, and history ranging from Native American to aviation. These other destinations have a mixture of natural and commercial coastal features, whereas Eastern Shore has the appeal of being less developed. Maryland also claims Assateague Island with beaches, nature, and ponies as a tourism asset, and Outer Banks aggressively promotes it natural beaches and coastal experiences. Among these competitors, the opportunity for space-related tourism and aqua-tourism stand out, but Maryland is serving as significant competition to the market as a destination for space-related tourism and economic development, and Maryland's recognition for the blue crab and recent efforts to build the aqua-tourism industry. In addition, the region is wedged between these strong competitors, lending visitor traffic from the south to be drawn to the Carolina coast, while visitors from the northeast may be attracted to the Maryland and Delaware coasts. Furthermore, visitors originating from Washington D.C. may be drawn to the Maryland or Delaware coastal areas due to proximity/ease of access.

While preserving the character and environment of the shore are important, attractions and signature visitor experiences are still important for this region, one of which could involve a space-related tourism attraction that has the potential to be a unique element for the region and for the state. The region also lacks the brand recognition enjoyed by more prominent attractions in the state. The region has limited accessibility. There

are only entry points from Maryland and the Chesapeake Bridge Bay-Tunnel that connects to Virginia Beach; and there are no commercial airports in the region. There are, however, general aviation airports. U.S. 13 runs the length of the peninsula, allowing for convenient transportation; however, towns and outdoor recreation are largely positioned along the waterfront and out-of-sight from many travelers along the road. As such, there is a perception as a pass through destination. Signage and beautification along U.S. 13 are also recognized as regional needs as well as additional community infrastructure in some areas such as technology, water/sewer, etc.

Eastern Shore Strategy

Product Focus Areas

Based upon research and analysis efforts described and in consideration of the tourism situation, the following are identified as the primary and secondary areas of product focus for the Eastern Shore. The key definitions below describe these areas, which form the basis of the product objectives.

- Primary theme focus: Nature & Outdoor Recreation, Town/City Centers, Industry (Space), History & Heritage (Cultural Heritage), Culinary (Aqua-tourism), Events

- Secondary theme focus: Culinary (Agri-tourism, Wineries, Dining), Arts & Music, Commercial Attractions (Higher-end)

Those product themes identified as "primary" can generally be characterized as existing or growing product areas that within the next five years should be further developed or enhanced in an effort to serve as (or support) primary draws for the area. Those categorized as "secondary" are areas that in the next five years may realistically need a longer time horizon to develop into a primary draw for the region. Secondary may also indicate areas that may be more niche focused, or those that are generally complementary/auxiliary product experiences to the primary draws in the next five years.

Key Definitions

Nature & Outdoor Recreation - Relaxing and active experiences to enjoy Virginia's scenic natural environment and outdoors, including but not limited to driving tours, hiking, biking, paddling, boating, fishing, hunting, observing wildlife, and others. Beach experiences are also included.

Town/City Centers - Refers to the central area of a destination, generally a downtown or main street area

Industry - Refers to products that leverage specific industry areas in which Virginia has a base. For Eastern Shore, this definition specifically refers to space.

History & Heritage - Experiences, structures, and sites that show Virginia and U.S. history and heritage

Culinary - Includes wineries, breweries, distilleries, foodie/dining, and agri/aqua-tourism

Events - May include festivals, fairs, concerts, performances, tournaments/races (running, biking, swimming, kayaking, rowing, boating/sailing, fishing, etc.), and other events. These events serve to further enhance other product themes.

Arts & Music - Visual, performance, and craft arts experiences and music of various genres and musical heritage

Commercial Attractions - Refers to tourism attractions designed for user entertainment and enjoyment and may not necessarily rely heavily upon inherent destination features. For Eastern Shore, this specifically refers to the higher-end/luxury attractions. Higher-end/luxury attractions may include spas, resorts, golf courses, and other experiences with upscale elements targeted to an affluent market.

In addition, it should be noted that **cultural heritage** refers to the cultural and social characteristics of a region that are fundamental to evaluating a tourism destination. Culture consists of the beliefs, behaviors, objects, and other characteristics common to the members of a particular group or society. From a tourism perspective, visitors want to experience the local culture of a destination. This includes many components, such as art and music of the region, history, local crafts, traditions, style and types of local food, architecture, religion, and distinctive leisure activities. These are what make the cultural heritage of Virginia "authentic." By its very nature, culture is interpreted by visitors in many ways. Each region will have the opportunity to further define the regional "cultural" lures, based on information in this plan.

Objectives and Strategies

Applicable objectives and strategies are presented for the five plan outcomes of Products, Pillars (infrastructure), Partnerships, Promotions, and Policies. Following the objectives and strategies are additional action steps specific to the region which are above and beyond the actions of the state level plan. Additional action steps should be read in conjunction with action steps of the state level plan.

Strategies in the plan are assigned a priority/timing as high or immediate action (denoted by red) and medium or mid-term action over the next five years (denoted by blue). The categorization of high or medium is both a function of priority and timing for the region. Those categorized as "high'" can generally be characterized as existing or growing product areas that within the next five years should be further developed or enhanced in an effort to serve as (or support) primary draws. Those categorized as "medium" are areas that within the next five years may realistically need a longer time horizon to develop into a primary draw, those that may be more niche areas, or those that are generally complementary/auxiliary product experiences to the primary draws in the next five years.

Products

Nature & Outdoor Recreation

Nature & Outdoor Recreation Objective: Visitor experiences are further developed which highlight Virginia's natural beauty and natural assets			
Strategy	*Priority/Timing*	*Strategy*	*Priority/Timing*
Develop, maintain, and expand outdoor trails and water trails	●	Seek and maintain designations for National Scenic Byways and the Virginia Scenic Byways and Scenic Drives	●
Continue to develop and enhance outdoor experiences at parks, forests, recreation areas, nature areas, and preserves	●	Develop and enhance accommodations related to outdoor experiences	●
Leverage Virginia's waterfront areas	●		

Additional Regional Actions:

- Ensure water accessibility for the destination, including boat ramps, kayak access, fishing piers, and outfitters and guides which allow for water and coastline navigation
- Work with federal agencies such as the National Park Service and the U.S. Fish and Wildlife Service to ensure sustainability and access to beach at Assateague Island
- Develop and enhance trails and water trails for distinctive outdoor experiences. Water trails should ensure ease of access for boats, canoes, kayaks, etc. Bike trails should ensure water visibility.
- Continue to enhance park and recreation areas for visitors, including kid-friendly activities related to water recreation
- Continue educational and experiential features for coastal wildlife and aquaculture
- Leverage waterfront areas that surround the peninsula, including visibility and awareness of waterfront areas from U.S. 13, access to coastal areas, including boardwalks, piers, and lighthouses, and commercial opportunities such as restaurants and eco-oriented resorts
- Explore the development of additional outdoor-oriented accommodations near the water, which may include eco-oriented resorts as well as cottages and camping opportunities

Towns/City Centers

Town/City Centers Objective: Visitor experiences in town/city centers are improved to create attractive destinations			
Strategy	*Priority/Timing*	*Strategy*	*Priority/Timing*
Develop and enhance outdoor experiences in the town or city center	●	Take steps to align with standards of the Virginia Main Street Program and National Main Street Program	●
Enhance town/city center areas through development of the arts	●	Encourage the development of enterprises that enhance and balance the town/city center's current offerings and increase vibrancy	●
Establish and uphold guidelines for town/city center enhancement and redevelopment	●	Develop transportation that allows for enhanced connectivity within and to the town/city center	●

Additional Regional Actions:

- Leverage coast-oriented nature and recreation opportunities prevalent in the area and tie in these opportunities to the town/city center area. This may include various water-related features in the downtown area that could include fish, crab, and oysters on display, remote control boat activities for kids, a simulated paddling feature, or play areas for kids that include historic boat replicas. This may also include outfitter locations in the downtown area where activity/equipment is visible to visitors, and shuttle service from town to outdoor coastal areas for one-way biking trips is available.
- Ensure works of regional artists are displayed, including those that showcase the wildlife (including ponies) and coastal images of the area. Include other visitor themes, such as the outdoors, that may feature sculpture or other forms related to fishing, wildlife, and iconic representations of the region.
- Seek to align with the guidelines and goals of main street designations which can help to achieve mobilization, redevelopment, and economic development efforts to town areas
- Explore the development of business offerings to further support visitors, which may include the development of hotel supply to balance offerings in destinations, unique dining and retail
- Explore the development of shuttle service to coastal areas from towns
- Explore personal mobility options such as rentals for bikes, Segways, golf carts, scooters etc. intended to enhance the eco-oriented theme for the region

Products (continued)

Industry (Space)

Industry Objective: Other visitor experiences, which leverage Virginia's economic strengths and specialized industries are enhanced and created	
Strategy	*Priority/Timing*
Develop visitor experiences and infrastructure to leverage space launches and research taking place at Wallops Island	●

Additional Regional Actions:

- Develop infrastructure to support visitors for launches in strategic viewing locations with accessible roads, prime views, parking, and amenities on-site such as restrooms, concessions, and equipment for enhanced viewing. These sites should be multi-purpose and available to use for other activities during inactive periods, which may include positioning these sites and locations for star gazing and astronomical events.
- Enhance and develop experiences that build upon the launches and NASA's presence, including redevelopment of the visitors center and museum to create educational, yet modern and interactive experiences and launch pad tours
- Consider distinctive developments such as a planetarium, simulated space launches, expansion of space camp programs for families and groups on a day, weekend, or extended stay-basis, and other developments
- Explore the opportunities for events and festivals that relate to space and may surround launches

- Pursue economic development opportunities to attract space-related businesses, educational institutions, and research facilities
- Develop visitor options for delayed launches and suggested visitor activities prior to and following launches to extend visitor stays. This includes readily visible and accessible activities and attractions that may be appealing to families and visitor types traveling to the shore for launches. This may include itineraries for Assateague Island and Chincoteague, Tangier Island, coastal tours, special events scheduled near launch dates and other similar options.

Products (continued)

History & Heritage

History & Heritage Objective: History and heritage experiences are preserved, refreshed, and expanded			
Strategy	*Priority/Timing*	*Strategy*	*Priority/Timing*
Refresh history and heritage visitor experiences	●	Continue to connect history and heritage experiences	●
Invest in historic structures, sites, and attractions	●	Enhance historical experiences through accommodations	●

Additional Regional Actions:

- Continue to build on watermen culture heritage with educational and experiential attractions
- Leverage Tangier Island as a unique step back in time for visitors to experience the island's history and cultural heritage
- Include experiential and interactive elements at historic sites
- Utilize the historic character of towns to explore the development of additional historic accommodations such as hotels and bed & breakfasts
- Continue to showcase the region's history and heritage through events and festivals as well as personifying the culture of the region through culinary, arts, and other visitor themes

Culinary

Culinary Objective: Culinary visitor experiences (wineries, agri-tourism, dining, etc.) are established and expanded			
Strategy	*Priority/Timing*	*Strategy*	*Priority/Timing*
Expand wine tourism experiences	●	Build reputation as a destination for dining and continue to develop unique restaurant experiences	●
Develop and enhance visitor experiences related to Virginia's agriculture and aquaculture products	●	Develop and expand trails to enhance culinary experiences	●

Additional Regional Actions:

- Encourage additional winery development in the region for a coastal wine experience, which allows for enhancement of wine trail
- Continue to enhance agri-tourism experiences and aqua-tourism experiences with experiential, kid-friendly, and educational features. With Eastern Shore's vast coastline, the region has the opportunity to further develop aqua-tourism experiences (oysters, crab, clam, fish) with aquaculture businesses developing experiences for visitors including guides, product tastings, and educational/science opportunities, etc.
- Leverage aquaculture in the region to build and enhance culinary experiences, particularly as it relates to crab, oysters, clams, and fish
- Explore the development of culinary trails incorporating dining, wine, agriculture, and aquaculture
- Continue to use events and festivals as a platform to enhance culinary profile of the region, tying in heritage, arts, music, and other visitor themes
- Continue to develop distinctive dining experiences, leveraging coastal locations and aquaculture and agriculture of the region

Products (continued)

Events

Events Objective: Events which leverage Virginia's tourism assets are created and expanded	
Strategy	*Priority/Timing*
Enhance and develop events which promote the key visitor themes	●

Additional Regional Actions:

- Develop and enhance signature events for the region. These signature events should build upon, promote, and reinforce key visitor themes and showcase the authenticity and character for the region. Examples may include outdoor-related events such as marathons, races, boating events, and other outdoor competitions, culinary events that feature aquaculture of the region, arts events, and other events that highlight the watermen cultural heritage of the region, and others.
- Tie in multiple visitor themes in events, where appropriate, which may include coastal event locations, local agriculture, wine, oysters, crab, local artists, and others
- Use events to extend visitor seasons and attract visitor seasons during the traditional off-season
- Leverage the prominent Pony Swim event, continue to re-invent the experience, and seek to extend this event beyond one weekend, and incorporate additional complementary events and activities

Products (continued)

Arts & Music

Arts & Music Objective: Visitor experiences related to music and arts (performance, visual, craft, etc.) are created and enriched			
Strategy	*Priority/Timing*	*Strategy*	*Priority/Timing*
Enhance and develop music and art trails	●	Develop and enhance concentrated arts experiences	●
Add art to public spaces	●		

Additional Regional Actions

- Develop art trails that connect artisans and towns in the region
- Ensure works of regional artists are displayed in public locations, including those that showcase the wildlife and coastal images of the area. Include other visitor themes such as the outdoors which may feature sculptures or other forms related to fishing, wildlife, and iconic representations of the region.
- Consider the development of public art along U.S. 13 that may be incorporated into signage that unites the region or rural sculpture gardens, and draws interest from 13.
- Develop arts & cultural districts and explore the development of other concentrated arts experiences such as an art commune that may be in a picturesque location where visitors can see artists work, purchase art, and participate in classes and activities, etc.
- Explore the development of additional outlets to display art, including the development of venues or temporary exhibits to showcase art
- Use events and festivals to enhance arts profile of the region

Commercial Attractions

Commercial Attractions Objective: Commercial attractions are increased	
Strategy	*Priority/Timing*
Explore the development of commercial attractions designed for a higher-end, luxury market	●

Additional Regional Actions

- Explore opportunities for the development of higher-end, eco-oriented resort or accommodations along the waterfront. New development should consider the inclusion of meeting space. The feasibility of such developments would need to be carefully studied.

Pillars

Strategy	*Priority/Timing*	*Strategy*	*Priority/Timing*
Transportation Objective: Strategies to improve transportation are developed and executed			
Initiate concerted strategy to improve road transportation for tourism	●		
Wayfinding Objective: Visitor wayfinding is improved			
Ensure signage and visitor information is visible and available through multiple points	●	Invest in technology infrastructure (Wi-Fi, cell reception, GPS, etc.)	●
Reinforce community sense of place	●		
Education & Training Objective: Tourism education and training programs are continued and enhanced			
Enhance training and education of tourism workforce	●	Ensure tourism education programs are continued for students	●
Research Objective: Tourism research is available which supports tourism development and marketing initiatives			
Continue to engage in or obtain research on visitors	●		

Additional Pillar Action Steps:

- Initiate strategy for U.S. 13 improvements that encourage beautification efforts of U.S. 13, which may include the clean-up of blighted properties through incentives. There may be potential to replace areas with rural art gardens that draw interest from U.S. 13.
- With limited accessibility to the Eastern Shore, pursue efforts to educate the traveler about the Chesapeake Bay Bridge-Tunnel. Research has shown that the cost of the bridge is not necessarily a hindrance to visitors, but enhanced visibility/information regarding rebates for return trips is encouraged.
- Explore improved access options to Tangier Island. This includes visibility of existing ferry service and feasibility of additional off-season frequency and routes from Virginia's mainland.
- In an effort to improve beautification, signage, and wayfinding, explore creative initiatives that include the development of artistic installations at the base of signs. These artisan creations could display representative themes of the shore such as boating, wildlife, space, and others, as well as incorporate town names, which helps to enhance sense of place.
- Initiate a cohesive effort between Accomack and Northampton counties in conjunction with VDOT to enhance road signage and wayfinding along U.S. 13. Increasing awareness of the waterfront and waterfront towns is important for growing the number of visitors from U.S. 13. This may include additional signage to VDOT signage that references waterfront points of interest.
- In an effort to mitigate perception as a pass-through destination, explore changing reference to the Maryland State Line on U.S. 13. It is suggested that signage should rather note specific towns or cities that are ahead of the traveler.
- Continue certification programs such as Virginia's Eco-tour Guide as well as customer service trainings

Partnerships

Strategy	*Priority/Timing*	*Strategy*	*Priority/Timing*
Tourism Organizations Objective: Organizations to lead tourism initiatives are strengthened or formed			
Create and strengthen tourism organizations	●		
Government Objective: Collaboration among government organizations at the local, state, and federal levels for tourism initiatives is improved			
Increase communication, planning, and coordination among government entities	●		
Connectivity Objective: Connectivity among tourism attractions, businesses, and destinations is improved through partnering			
Develop and enhance communication and partnering among Virginia tourism industry stakeholders	●	Increase coordination and collaboration among stakeholders that share interests in tourism assets outside of Virginia	●

Additional Partnership Action Steps:

- Build the capacity of the Eastern Shore Tourism Commission as a regional organization responsible for tourism with tourism professionals dedicated to tourism marketing and development
- Continue to increase collaboration and communication among Accomack and Northampton counties to support tourism initiatives, economic development projects affecting the shore, and joint efforts for signage improvements along U.S. 13
- Communicate, coordinate, and collaborate with NASA, MARS, and other private sector organizations related to Wallops Island launches. Engage in communication with Maryland regarding its efforts to develop space-related tourism and economic development and seek ways to partner that will be mutually beneficial.
- Partner with NASA Langley, Virginia Air & Space Center, and Udvar-Hazy Center for statewide promotions
- Seek opportunities to partner among hoteliers, B&Bs, restaurant owners, and tourism businesses (guides, aqua-tourism, wineries, artisans, etc.) for cross-promotional discounts and packages
- Work with federal agencies such as the National Park Service and the U.S. Fish and Wildlife Service to ensure sustainability and access to the beach at Assateague Island

Promotions

Strategy	*Priority/Timing*	*Strategy*	*Priority/Timing*
Government, Business & Resident Objective: Efforts to promote and educate government leaders, the business community, and residents on tourism initiatives and benefits are continued			
Communicate and inform local and state government officials on tourism benefits and initiatives	●	Communicate and inform tourism industry stakeholders, including partners, the business community, and residents on tourism initiatives and benefits	●
Economic Development Objective: Tourism promotion efforts for economic development are enhanced			
Enhance promotion of Virginia to potential tourism investors, businesses, and developers to generate economic development	●		
Connectivity Objective: Virginia is positioned based on the lures of tourism assets with a strategy to improve connectivity among destinations, attractions, and visitor themes			
Enhance and create visitor itineraries and packages	●	Enhance and develop themed trails	●
High Impact Markets Objective: Visitor markets with high impact continue to be targeted, while new markets are explored			
Continue to identify and evaluate key geographic and thematic target markets for promotions	●		

Additional Promotion Action Steps:

- Develop communication plans for government officials, tourism stakeholders, businesses, and residents and continue to educate and inform officials on tourism benefits (qualitative and quantitative based on research) as well as ongoing initiatives for economic development through various means
- Identify and engage key opinion leaders in the region that may help to serve as ambassadors for the tourism industry and aid in the education and promotion of tourism to government leaders, funding efforts, and development initiatives
- Explore opportunities for attracting tourism economic development and investment, including economic development related to space-related industries
- Explore the development/enhancement of theme trails, which highlight and combine visitor themes of the shore, such as nature, cultural heritage, agri-tourism, aqua-tourism, wineries, arts, etc. With a concentrated geographic area such as the Eastern Shore, trails allow for destination, attraction, and theme connection in a convenient experience for visitors.
- Similar to trail development, explore the development/enhancement of itineraries and packages that highlight and combine visitor themes of the shore, such as nature, cultural heritage, agri-tourism, aqua-tourism, wineries, arts, etc. Seek opportunities to partner among hoteliers, B&Bs, restaurant owners, and tourism businesses (guides, aqua-tourism, wineries, artisans, etc.) for cross-promotional discounts and packages.
- Communicate, coordinate, and collaborate with NASA, MARS and, other private sector organizations related to Wallops Island launches. Engage in communication with Maryland regarding their efforts to attract tourism investors, business, and other enterprises, which would enhance the space-related tourism and the space industry in Virginia.
- Continue promotional efforts to focus on high-value geographic markets, including visitors from neighboring Maryland

- Partner with NASA Langley, Virginia Air & Space Center, and Udvar-Hazy Center for statewide promotions
- Continue promotional efforts on key thematic markets for the Eastern Shore, particularly the nature and outdoor recreation visitor

Policies

Strategy	*Priority/Timing*	*Strategy*	*Priority/Timing*
Funding Objective: Funding is available for tourism growth			
Enforce policy for use of tourism tax revenues collected by localities	●	Create sustainable funding policies for tourism marketing and development for communities	●
Tourism Policies and Programs for Assistance Objective: Tourism policies and programs which provide assistance for growth and development are enhanced			
Continue and enhance programs which support tourism marketing	●	Continue to evaluate policies which encourage an attractive tourism business environment	●
Continue and explore improvements for programs which support tourism product development	●	Educate public and private sector stakeholders on legislative policies and programs impacting tourism	●
Explore establishment of assistance program for tourism businesses	●		
Tourism Policy for Government Objective: Policy for government cooperation is created to assist and support the tourism industry			
Establish policy for cooperative guidelines and arrangements for cohesive government approach to the tourism industry	●		
Preservation Objective: Policies and programs designed to preserve historical, cultural, and natural assets are maintained			
Uphold policies and programs which promote sustainability and preservation of historical, cultural, and environmental assets	●		

Additional Policies Action Steps:

- Explore the development of a tourism council at the community level in localities where policy enforcement is recognized as an issue. The council should be comprised of public and private stakeholders that are responsible for overseeing the use of tourism tax revenue in the community.
- Identify local liaisons or advocates that can work to address policies and programs, including the creation of Tourism Zones, and national grant and assistance programs
- Continue to explore alternative creative funding solutions to achieve community solutions and work with local governments, where appropriate, to secure dedicated funding that could be reinvested for tourism marketing and development purposes. Garnering widespread support from tourism stakeholders and an advocacy effort of the industry will be important in influencing government leaders. For tourism development, the formation of a tourism development fund at local level could be explored.
- Explore the development of tourism business assistance programs, such as incubators, through local governments, small business administrations, and economic development departments, as appropriate, to seek support and assistance for tourism businesses

- Continue to evaluate business policies, ordinances, codes, etc. at the local level that may impact visitation and tourism business growth. Local policies and their enforcement may vary throughout the state, and it is critical for local stakeholders to collaborate on efforts to create or amend policies that will positively impact tourism.
- Continue to engage in preservation and sustainability efforts at the local level, regarding historical, cultural, and environmental assets, including seeking Virginia Green Certifications and LEED certifications for new development

Key Stakeholders

The below list of regional and universal stakeholders illustrates the types of stakeholder groups that may be involved in implementing the State Tourism Plan and the region's strategies and action steps. The lists are comprehensive, but not necessaily exhaustive. In addition, regional stakeholders include local and regional government offices, economic development offices and planning district commissions. The list of regional stakeholders highlights organizations specific to the Eastern Shore, including those organizations identified as having tourism marketing representatives, while universal stakeholders includes a broader list comprised of key organization types, statewide organizations, state government entities, and federal organizations.

Regional

- Anheuser-Busch Coastal Research Center
- Artisans Guild Eastern Shore of Virginia
- Arts Council of the Eastern Shore
- Arts Enter
- Cape Charles Bed & Breakfast Association
- Cape Charles Business Association
- Cape Charles Historical Society
- Chesapeake Bay Bridge-Tunnel District
- Chincoteague Cultural Alliance
- Chincoteague Chamber of Commerce
- Eastern Shore Art League
- Eastern Shore Bed & Breakfast Association
- Eastern Shore Community College
- Eastern Shore Historical Society
- Eastern Shore Museum Network
- Eastern Shore's Own Art Center
- Eastern Shore of Virginia Tourism Commission
- Eastern Shore of Virginia Chamber of Commerce
- Garden Club of the Eastern Shore
- Historic Downtown Chincoteague Main Street Merchants
- Onancock Business & Civic Association
- NASA
- Northampton County Chamber of Commerce
- Virginia Commercial Space Flight Authority

Universal

- Art/Music Programs
- Artisan Center of Virginia
- Attraction Management
- Chambers of Commerce
- Colleges (including community)/Universities
- Council on Virginia's Future
- Department of Agriculture and Consumer Services
- Department of Business Assistance
- Department of Conservation & Recreation
- Department of Environmental Quality
- Department of Forestry
- Department of Gaming & Inland Fisheries
- Department of Historic Resources
- Department of Housing & Community Development
- Department of Rail and Public Transportation
- Department of Transportation
- Destination Marketing Organizations
- Downtown Development Associations
- Educational Institutions
- Environmental Organizations
- History Foundations/Non-Profit Organizations
- Horse Breed Associations
- Hospitality Associations
- Keep Virginia Beautiful
- Local Arts Organizations
- Local Downtown Development Associations
- Local Government (City/Town/County)
- Military Associations
- National Park Service
- National Refuge Service
- National Trust for Historic Preservation
- Non-Profit Arts & Music Organizations
- Non-Profit Organizations
- Planning District Commissions
- Preservation Virginia

- Private Businesses
- Sports Associations
- State Government Departments
- State Legislators
- Urban Forest Council
- Virginia Association of Convention and Visitors Bureaus
- Virginia Business Incubation Association
- Virginia Chamber of Commerce
- Virginia Commission for the Arts
- Virginia Community Development Corporation
- Virginia Downtown Development Association
- Virginia Farm Bureau
- Virginia Economic Development Partnership
- Virginia General Assembly
- Virginia Green
- Virginia Historical Society
- Virginia Horse Shows Association
- Virginia Hospitality & Travel Association
- Virginia Marine Resources Commission
- Virginia Music Associations
- Virginia Tech Community Design Assistance Center
- Virginia Tourism Corporation
- Virginia Wine Board
- Virginia Wine Marketing Office

Regional Strategy Takeaways

It is the combination of the tourism products which create a destination, and as such, these combined strategies are meant to build the Eastern Shore as a destination in a sustainable manner and maintain the character and authenticity of the region. The strategies outlined are intended to build upon the Eastern Shore's core strengths, enhance visitor experiences, and ultimately enable the region to increase tourism. When unique and genuine tourism experiences are connected or clustered in offering, destination appeal and strength is increased, allowing the region to compete more effectively against other destinations. The Eastern Shore has the opportunity to do just this by growing its tourism asset base and connecting visitor experiences to increase tourism and enhance competitiveness.

The Eastern Shore has the opportunity to further leverage its strong natural assets in an effort to increase tourism. This is not only for visitors seeking beaches and nature-oriented experiences, but the Shore's natural assets also extend to the basis of culinary-related tourism (aqua-tourism, agri-tourism, wineries, dining with local seafood or farm-to-table experiences), events oriented around the outdoors, history and heritage experiences related to watermen culture, outdoor arts and music experiences, potential eco-oriented resort development, and others. In addition to the Shore's nature and outdoors, the region's authenticity highlighted through its watermen culture, local arts, and cuisine offered to visitors in an integrated manner provide the opportunity for distinctive tourism experiences. It is space-related tourism that will help to set the Eastern Shore apart not only from other areas in Virginia, but also other states regionally. It has the opportunity to serve as a calling card for the Eastern Shore, where visitors will be able to enjoy the "step back in time" experience offered in the relaxing environment of the shore, while also witnessing the futuristic and high-technology offerings through rocket launches and new visitor attractions at Wallops Island.

High-Level Regional Takeaways:

- Leverage outdoors as a unifying theme for the region, further developing eco-oriented outdoor experiences and scenic getaways
- Enhance direct water accessibility and mitigate restrictions to beach access
- Ensure signature experiences for the region, including space-related tourism and those experiences to extend visitor seasons
- Cluster product development and connect attractions and destinations for concentrated experiences, including outdoors, watermen heritage, culinary, arts, and other visitor experiences
- Build recognition of tourism assets
- Improve community infrastructure, including signage and beautification
- Improve destination infrastructure for visitors, including accommodations
- Maintain character and authenticity, including the relaxed nature of the region, create new development in a sustainable manner
- Enhance economic base
- Enhance collaboration for tourism development and marketing
- Continue to collaborate regionally through Coastal Virginia