

Tourism

I. INTRODUCTION

Recent Community Input

While the word “tourism” may not have been specifically acknowledged during certain phases of the strategic plan input process, various factors relating to tourism were identified. Because tourism is defined below in much greater detail, for the purpose of this part of the evaluation, this section will be evaluating issues identified by residents that relate to visitation, meetings and conventions, recreation, museums and other cultural treasures necessary for a tourist destination, along with planning (with tourism in mind), transportation and technology. This is an interdisciplinary approach that mirrors the intrinsic qualities encapsulated in tourism promotion.

1. Strategic Plan 2012: Community Input Phase¹:

While “tourism” as a concept was not necessarily addressed during this process, a number of comments were made relating to the parks, cultural offerings, traffic, and other components of PWC as a tourist destination. While the comments were rather lengthy, a full itemization of the tourism-related comments has been placed in the appendix. In summary, a total of 1,828 participants provided input into this phase of the strategic planning process in May through November of 2007. The following breakdown outlines the number of participants per citizen engagement venue:

- Community meetings: 404 (74 Adult, 330 Youth)
- Internet survey: 129 completed surveys
- 2007 Citizen Survey: 1,287 citizens
- E-mail responses: 8 responses

2. Future Commission Report²:

More than 1,800 citizens participated in community meetings or submitted written comment for this community visioning process, evaluating and describing what they would like the County to look like in the year 2030.

The following descriptions were taken from the *Future Commission 2030 Report* that relate directly to tourism.³

¹ The Strategic Plan Community Input Phase was held during May-November, 2007. The community input phase, while open to all citizens in every magisterial district, does not necessarily represent a statically valid sample of residents in the county. Therefore, the input provided here is just another snapshot to be evaluated along with the other existing county documents.

² Once again, the input phase here was an attempt to gain additional feedback from various community organizations, not necessarily be a representative demographic sample of residents in the county.

³ The full analysis of the vision statements relating to Tourism are listed in Appendix B of this document.

Vision Statements: Tourism

“PWC is a thriving tourist destination, attracting visitors for day-trips and overnight stays. Our convention center draws groups looking for an affordable, attractive location to host conferences, reunions and other large-scale events. Tourism provides revenue to local businesses creates jobs for residents and diversifies the County’s tax base.”

Amenities for Tourists - The community preserves, develops and promotes the historical and cultural opportunities in PWC and provides world-class accommodations, services and amenities.

Heritage Tourism - With a national reputation for protecting and preserving the county’s history, PWC is a heritage tourism destination. The community leverages the presence of battlefields, museums and preserved historic properties.

Sports Center - PWC has a world-class sports center easily accessible by residents and visitors.

Convention Center - PWC has a convention center that attracts conferences, special events and large groups to our area. Through partnerships with cultural attractions like the National Museum of the Marine Corps, the convention center is a premier location for military reunions, veterans’ associations and historical organizations.

What is Tourism?

Tourism is defined as:

- “ 1) the activity or practice of touring, especially for pleasure.
- 2) the business or industry of providing information, accommodations, transportation, and other services to tourists.
- 3) the promotion of tourist travel, esp. for commercial purposes.”⁴

For purposes of this analysis, the topic will be expanded from just the simple definition of “Tourism” (the act of traveling and/or the act of promoting travel) to a much more robust definition of “**Sustainable Tourist Destination Management.**” What is Destination Management? The term "destination" refers to:

*“a physical space in which a visitor spends at least one overnight. It includes tourism products such as support services and attractions, and tourism resources within one day’s return travel time. It has physical and administrative boundaries defining its management and images and perceptions defining its market competitiveness.”*⁵

PWC has physical and administrative boundaries with organizations working toward the collective marketing of this area, therefore, PWC’s collective landscape of attractions are considered a single “destination”.

Destination management can include land use planning, business permits and zoning controls, environmental and other regulations, business association initiatives, and a host

⁴ “tourism.” *Dictionary.com Unabridged (v 1.1)*. Random House, Inc. 15 Mar. 2008 <[Dictionary.com http://dictionary.reference.com/browse/tourism](http://dictionary.reference.com/browse/tourism)>

⁵ Abstract “*Signposts for Sustainable Tourism Development.*” *The World Tourism Organization (WTO) Indicators Initiative*. 24 Mar. 2008 <http://www.tourismforum.scb.se/Sustainable_Development.asp>

of other techniques to shape the development and daily operation of tourism-related activities.

According to the World Tourism Organization:

"Sustainable tourism development guidelines and management practices are applicable to all forms of tourism in all types of destinations, including mass tourism and the various niche tourism segments. Sustainability principles refer to the environmental, economic, and socio-cultural aspects of tourism development, and a suitable balance must be established between these three dimensions to guarantee its long-term sustainability.

Thus, sustainable tourism should:

- *Make optimal use of environmental resources that constitute a key element in tourism development, maintaining essential ecological processes and helping to conserve natural heritage and biodiversity.*
- *Respect the socio-cultural authenticity of host communities, conserve their built and living cultural heritage and traditional values, and contribute to inter-cultural understanding and tolerance.*
- *Ensure viable, long-term economic operations, providing socio-economic benefits to all stakeholders that are fairly distributed, including stable employment and income-earning opportunities and social services to host communities, and contributing to poverty alleviation."*

Sustainable tourism development requires the informed participation of all relevant stakeholders, as well as strong political leadership to ensure wide participation and consensus building. Achieving sustainable tourism is a continuous process and it requires constant monitoring of impact, introducing the necessary preventive and/or corrective measures whenever necessary."⁶

Therefore, as Tourism is analyzed in this report, it will be viewed not just from a passive state of what is occurring in PWC, but from a more reactive state that analyzes what is happening in PWC and what can be done to affect the results that are desired in order to become the best tourist destination possible.

II. POPULATION/CUSTOMERS

As a "population," PWC serves a number of tourism interests that can be classified into a number of population groups. The groups reviewed below are classified into four subgroups: 1) Existing Tourism and Convention Industry, 2) Current Tourists, 3) Potential/Future Tourists and 4) Potential/Future Tourism Industry Businesses.

1. Existing Tourism and Convention Industry:

This category includes the current accommodations, attractions, outdoor recreation sites, meeting facilities, shopping locations, golf courses, dining establishments and

⁶ "Sustainable Development of Tourism Conceptual Definition," World Tourism Organization. 24 Mar. 2008 < http://www.world-tourism.org/frameset/frame_sustainable.html >

transportation options that are located in PWC. From these sites, visitors choose their vacation (or business) experience. It is this “community” of tourism businesses that is called the *Tourism Industry*. While some of the community may not be patronized exclusively by “tourists”, each of these community partners must decide for themselves how much of their business relies solely on “tourism”. For example, a hotel may feel that nearly all of its clientele come from people living outside of PWC, while a restaurant, on the other hand, may feel that only a small amount of their customers are tourists. It is from this self-evaluation that individual parks, hotels and attractions develop their local marketing plan and their separate tourism marketing plan. Regardless of their investment in the industry, each is treated as an equal partner.

- a. Accommodations: Currently, PWC is home to 37 hotels with an inventory of 3,604 rooms. The 37 hotels are classified in a range of categories including economy, midscale and upscale. These classifications are considered to be in the middle-range of all available hotel classifications in the county⁷. Additionally, PWC is also home to nine campgrounds with sites for tents as well as RVs and travel trailers. The camping experience can range from the primitive at the Chopawamsic Backcountry, a primitive camping experience at the Prince William Forest Park to family tent and travel trailer campgrounds to group cabin camps at the Prince William Forest Park (one of the two National Parks in the county). While scattered Bed and Breakfasts have operated in the county in the past, at the present time, no B&B’s operate in PWC and only one is in operation in the City of Manassas.
- b. Attractions: From Museums and Historic Sites to Waterparks, skating facilities, family-friendly, entertainment, sporting and educational attractions dot the landscape of PWC. Some of these include Manassas National Battlefield Park, the new National Museum of the Marine Corps, Nissan Pavilion, Splash Down Waterpark, as well as several historic areas and homes preserved and interpreted through the PWC Historic Preservation Division.
- c. Outdoor Recreation: Few places find the synthesis between nature and history like this destination. Over 37 miles of hiking trails, along with premier birding, on and off road biking, boating and fishing make this destination a crowd-pleaser. Almost every site preserved for outdoor recreation has a rich history that has been preserved and interpreted for visitors. According to a recent Virginia Visitor study only 3% of Northern Virginia’s visitors’ primary purpose of their trip is to participate in outdoor recreation, however, 12% of the visitors actually participate in some form of outdoor recreation.⁸ Some of PWC’s premiere outdoor opportunities for tourists include: Prince William Forest Park, Leesylvania State Park, Bull Run Mountains, as well as the various marinas that provide direct access to both the Potomac and Occoquan Rivers.

⁷ It is important to note that Prince William County does not have properties that fall into the highest nor in the lowest categories of hotel product.

⁸ Virginia Visitor Survey FY2007 Special profile of the Northern Virginia Visitor (those identifying a visit to the areas surrounding the cities of Arlington, Alexandria, Fairfax and Manassas.), compiled by TNS Travels America on behalf of the Virginia Tourism Corporation.

- d. Meeting Facilities: While meeting facilities are more limited in PWC, there are a few sites that have a niche market such as Hylton Chapel (for religious meetings and conferences) and Foxchase Manor (for upscale events and weddings).
- e. Shopping: The County has a fantastic location with proximity to a number of residents with disposable income making the area a good resource for a variety of shopping. From outlet to boutique and antique, there is a shopping experience for every kind of shopper. According to the Virginia Visitor study 22.7% of the Northern Virginia visitors participated in some type of shopping.
- f. Golf: PWC's 12 public (daily fee) courses offer a wide range of golf options for every level of player. Here, golf is priced according to the local market with the local user in mind and not necessarily discounted for the traveler. Golf is convenient and plentiful: two attributes admired by golf travelers. According to the Virginia Visitor study, approximately 2.5% of the visitors to Northern Virginia participated in golf while visiting.
- g. Dining: Due to three primary factors: 1) the large population base, 2) percentage of disposable income, and 3) large concentration of dual income families, PWC has the third largest number of restaurants in the state of Virginia and can still have a long wait during peak dinner hours. While fine dining remains limited in PWC, the Virginia Visitor study does identify that 19.2% of Northern Virginia visitors participated in fine dining while on their trip.
- h. Events: Large-scale special events can motivate and enhance a visitor experience. PWC has a number of large-scale special events during the peak leisure visitation months of May, June & September, including the spring and fall Occoquan Craft Festival, Sugarloaf Craft Festival, PWC Fair, as well as a number of community-based Fourth of July celebrations. Two event calendars are printed annually to distribute to tourists and a web calendar is continually updated on the www.visitpwc.com website with the most up-to-date information for visitors about events in PWC.
- i. Transportation: Public transportation partners in the county are limited, mostly categorized as taxicabs or public transportation (local buses.) Transportation to the *region* is plentiful with visitors coming via air at either Washington Dulles International or Ronald Regan Washington National Airports, via rail on Amtrak or via private vehicle to the county. However, transportation options through the county (moving from attraction to attraction) or from DC to PWC or from one of the airports to the county can be complicated and the systems certainly were not created with the visitor in mind.

2. Current Visitors:

In order to clearly identify the current traveler coming into PWC, they were categorized into groups with similar preferences, each having distinct needs and characteristics. Based on a survey conducted of PWC hotels, those visitors who stay overnight will be first identified and then will be compared with the visitor to the attractions located throughout the county. Each visitor group (the overnight visitor and the day visitor) offer opportunities to create return visits and future overnight stays.

PWC Overnight Visitors⁹:

- a. Corporate or Business Traveler: This refers to an individual traveling to the area for the sole purpose of a business related activity. Business travelers account for approximately 40% of PWC overnight visitors. They travel frequently and average 30 trips per year. This segment includes the following:

- Construction/Development
- Extended Stay
- Government Contractors
- Repeat Stay
- Retail Management

By far, this is the largest single user group for PWC hotels. Because of the specific need of this market segment, the hotel industry must be ready to meet the needs of the frequent business traveler.

The Virginia Visitor study shows that a full **33%** of the Northern Virginia visitor's primary trip purpose is of a business nature (whether attending a conference, personal business, or general business.) This combined number is the second highest motivating factor for those traveling to Northern Virginia.

- b. Leisure: This refers to an individuals interested in a pleasure trip to visit local attractions, family and friends, shops, neighboring areas, and recreational facilities. Leisure travelers account for approximately 15% of PWC overnight visitors. They are most often made up of both older couples and families with children.

- Families
- Individuals
- Interstate travelers (in route to other locations)
- Older Adults

PWC falls along the same national averages that show the largest percentage of leisure visitors coming to the county are here (primarily) coming to visit friends and relatives: **45%** of the Northern Virginia leisure visitor as outlined in the Virginia Visitor Profile.

- c. Government/Military: The federal government defines the government traveler primarily by length of stay: Temporary Duty (TDY) which includes business trips to other offices or installations; and Permanent Change of Station which includes relocation and temporary housing. The government segment accounts for approximately 17% of PWC visitors staying overnight.

- Active-Duty Military
- Federal

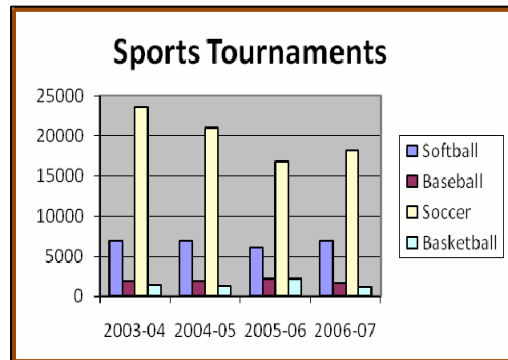
⁹ Market segment definitions were adapted from definitions utilized as generally accepted definitions by major hotel corporations in Prince William County.

- Local/County
 - State
- d. Group: A group is defined as rooms sold in blocks of 10 or more and are traveling with a common objective and itinerary. This group segment accounts for approximately 17% of PWC visitors staying overnight.
- School Groups
 - Older Adults
 - Special Interest Groups-(Shopping, Civil War, etc)
 - Sports (adult, senior, youth, amateur, tournament)

Figure 1 below outlines the sports tournament segment of the population by sport and by year. It is important to note that the last column identifies the actual “out of town” participants in the tournaments. The remainder is considered to be comprised of local residents.

Figure 1: Sports Tournaments¹⁰

Totals 2003-04 - 2006-07			
	Players for last four seasons	Teams (Last four seasons)	Players from Outside PWC in 4 seasons
Softball	26,625	1,531	7,722
Baseball	7,665	511	2,223
Soccer	75,411	5,151	21,869
Basketball	6,079	333	1,763



- e. Social, Military, Education, Religious and Fraternal (otherwise affectionately referred to as SMERF): This segment would include any social activity or event that would result in either individual or group travel, traveling for a specific purpose or to participate in an activity. Rooms sold to these travelers are generally purchased individually and not sold in blocks; however some larger event organizers may work with a specific hotel to establish a special rate for participants. This group segment accounts for 9% of the overnight visitors to PWC.
- Fraternities (Collegiate, Professional, Multi-Cultural)
 - Religious-gatherings, conferences, weddings
 - Reunions (Family, Military, Alumni, Societies)
 - Special Events (concerts, festivals, etc)

¹⁰ The information in these charts was collected from the Prince William County Park Authority’s annual survey of tournament directors. While they don’t collect information on precisely how many players come from outside Prince William County to spend the night, a quick survey of tournament directors revealed between 25-33% is the out-of-town estimate. For ease, the midpoint of 29% has been used in the third column of the first chart.

- Sports (Spectator)

According to the previously identified Virginia Visitor study, 11.1% of the Northern Virginia visitor participated in a family reunion during their visit while 3.4% participated in a special event.



These images show a variety of groups that frequent PWC, including: (from top) a senior softball tournament; a student group; and a military reunion group.

Annually, The PWC/Manassas Convention and Visitors Bureau publishes a snapshot of the group traveler to PWC. Listed in the chart that follows are the results of the 2007 study that outlines Group (pre-formed as well as SMERF travel).¹¹

Table 1: Groups Spending the Night in PWC during National Tourism Week 2007¹²

National Tourism Week 2007
Groups come to PWC in all shapes and sizes. Annually, the CVB conducts a quick phone survey of the hotel properties in the county to get an idea on the variety of the groups that come to PWC in a specific time frame. Keeping in mind that these are group bookings only (Leisure & Corporate not represented here), the following is a good representation of specific groups coming into PWC during National Tourism Week 2007 (May 12-20, 2007).
GROUP TOUR (<i>Identified by rooms sold in blocks of 10 or more, traveling with a common objective or purpose.</i>)
Older American Group - 1 group
Student Groups - 18 groups going to DC. (Originating from Ohio, CT, NC, TN, PA)
Government Groups - 4 groups
Group of 100 rooms for "Rocketry"
Unspecified group of 103 rooms, tourists from SC
Unspecified group of 16 rooms, tourists from Garden City GA
Unspecified group of 17 rooms, tourists from Holland, Michigan
International Group from Netherlands for DC Tour (room count unknown)
Sports Events
AAU Girls Basketball
Starpower
Soccer
Coach USA
Golf Group Event
VA State Golf Association
SMERF (<i>Identified as individual traveling for a social activity that can result in individual or group travel</i>)
Family Gatherings - (Unspecified number of groups with 1,100 people)
Weddings - 8
Lynchburg YMCA, swim meet (Unspecified number of rooms)
Eukanuba/IAMS Dog Show, judges staying in PWC
Religious - All hotels housing students for "Teen Mania" from all over the U.S., May 11-12, 22,000 at Nissan Pavilion
Military Reunions - 3
Teamster Ride (motorcycle group)
FLW Outdoors Fishing Tournament

Visitors to PWC Attractions:

Based on the same groups as identified for overnight visitors, a survey was sent to attractions and facilities that greet out of town visitors for a snapshot of their "tourist" (whether spending the night or a day-tripper). Certainly, a majority of the sites surveyed catered specifically to leisure visitors and thus, the survey results are skewed accordingly.

¹¹ The CVB conducts a survey of hotels during National Tourism Week in May of each year. The purpose of the survey is to draw attention to the variety of visitors staying overnight in Prince William County and a means of educating the public and local officials of the breakdown of group visitors in just one week in the county.

¹² Prince William County/Manassas Convention and Visitors Bureau

Visitors to all PWC attractions and facilities (not necessarily overnight visitors) identified include:¹³

- Corporate/Business Traveler: This market segment represents 4% of visitors to PWC Attractions.
- Leisure Traveler: This market segment represents 50% of visitors to PWC Attractions.
- Government/Military: This market segment represents 4% of visitors to PWC Attractions.
- Group Traveler: This market segment represents 4% of visitors to PWC Attractions.
- SMERF Traveler: This market segment represents 18% of visitors to PWC Attractions.

1. Potential/Future Tourists

The potential tourist is identified by studying trends in visitation from various market areas along with inquiries received from various markets over a period of time. As far as the county's leisure traveler is concerned, there is not a large shift in their primary location over a longer period of time. Month to month may vary with the top five departure cities shifting rank in the top five in various months, however, the departure cities remain consistent.

2. Potential/Future Tourism Businesses

Hardest to define and therefore hardest to service are those business owners interested in opening a tourism-related business in PWC. At this point there has not been an effort to identify and single out those interested in a tourism-related business until the permit process has been engaged. At times, various market study companies conducting feasibility studies may contact one or more persons in the PWC government or at the Convention and Visitors Bureau, but these contacts do not represent the entire population of those "potential tourism businesses".

Demand for services:

Generally speaking demand for product and services in tourism does not yet surpass the supply. During certain weekends and planned events between May and June demand is highest for travel to the county and some visitors may face primary hotel choice unavailability or preferred nights that are unavailable.

A disturbing trend taking place over the past seven months is the continued decline in visitation, hotel occupancy and room revenue despite recent surveys showing that Americans are not changing their traveling habits too much in spite of the weak

¹³ For a point to point comparison, the same categories were used here for all visitors as were previously used for the "Overnight Visitors" analysis. Survey participants were asked to classify their visitor population into these predefined visitor groups. For a complete definition of the visitor groups, refer to the full definitions beginning on page 6.

economy.¹⁴ Further, surrounding jurisdictions are not witnessing the decline in occupancy in the same fashion as PWC.

Changing trends:

Over the past five to ten years there has been a significant shift from PWC as a primarily leisure (overnight) destination to a primarily corporate (overnight) destination, based on information shared with the CVB from area hotels. This change has been reflected on the overnights at PWC hotels, taking them from primarily full on Friday, Saturday & Sunday to now primarily full on Monday, Tuesday & Wednesday.

III. DESIRED RESULTS

In February 2001, the Board of County Supervisors created the PWC/Manassas Convention and Visitors Bureau (CVB) as an independent entity to promote tourism in PWC. The CVB is a tax-exempt entity under 26 U.S.C. 501(c) (6). The creation of the CVB was the result of an independent study and at the recommendation of a citizen committee. The CVB has an operating agreement with the County government and is overseen by a Board of Directors. A portion of the County's transient occupancy tax funds the CVB. The CVB works under contract to provide tourism promotion services and is the official destination marketing organization of PWC. Further, the CVB also works under contract with the city of Manassas, solidifying the joint marketing effort of county and city attractions.

The independence of the CVB was an effort to obtain greater prominence of tourism as an economic development engine and to allow the CVB to function as more of a not-for-profit. Through its independent status, the CVB has been able to develop partnerships, programs and take on projects that it might not otherwise have the ability to do. One example is the recently published "Prince William County Then & Now". As a not-for-profit, the CVB staff could coordinate and write the publication as well as obtain and maintain the copyright to the book's contents.

Annually, the CVB works with the county Strategic Goals, their own Strategic plan and defines a Plan of Work that includes efforts in both Marketing and Communication (outreach to visitors coming into PWC) and Visitor Services and Development (identifying services to provide to visitors in the county that will help make their visit a more enjoyable experience, increasing the likelihood that they will return to the county. The most recent plan of work follows.

¹⁴ *The Trend*, National Tourism Association, March, 2008. <http://www.nta.travel>. Recent survey conducted by RUF Strategic Solutions on behalf of AIG Travel Guard and reported in The Trend newsletter.

**PWC/Manassas CVB Plan of Work
Marketing and Communication**

Defined Strategic Goals

Enhance the visitor experience--before, during and after their trip to PWC, by providing comprehensive visitor information and service prior to an arrival or during the initial planning process.

Maximize the Economic Impact of Visitors coming or planning a trip to PWC-Provide proactive packaging opportunities for leisure and corporate/meeting visitors that are planning a trip, increasing exposure of the smaller, less visited attractions.

Increase interest of repeat visitation. Market to those who have visited to return to PWC. Utilize smaller attractions and unique "stories" along with upcoming events as a catalyst to entice previous visitors to return for subsequent visits.

Increase exposure and opportunities of the **Cooperative Advertising Program** in an effort to gain greater participation from partners like county historic attractions, PWC Fair and other logical attractions, and events not currently participating in the program thereby creating a stronger regional presence as a viable, cohesive, active and welcoming destination.

Develop woven "stories" that tie together the cultural/heritage/historic attractions and events in PWC and weave the county's history and market the stories through a variety of means: event offerings, media outlets, meeting and convention marketing, group tour opportunities, local tour possibilities. The stories will develop a sense of community pride and offer a different look at PWC's promotional efforts.

Utilize the Convention and Visitors Bureau's position with contacts in the industry to Increase the exposure and actively **market PWC as a viable event host of appropriate sports** events with the cooperation and participation of PWC and the Park Authority.

Personalize PWC to meetings and convention attendees. Develop opportunities (whenever possible) and make it convenient to get meeting attendees out to local events and attractions thereby creating a vested interest in the area, and community so their meeting becomes a "memorable experience".

Utilize the CVB as catalyst for unified messaging with all destination partners (large and small including small museums, seasonal attractions, and others) to develop key messages, understand their direction, markets and define a destination marketing "positioning".

**PWC CVB Plan of Work
Visitor Service and Development**

Defined Strategic Goals

Increase website booking opportunities for hotels and pre-purchase of attraction tickets, event admissions and other items on the visitpwc.com website. Work collaboratively with attraction and event partners to create attractive packages on the website. Work with attractions, sports event organizers and others planning events in PWC to provide linking opportunities to take advantage of these pre-planning opportunities.

Increase Opportunities for mutually beneficial partnership programs, including both traditional and non-traditional partners in an effort to increase awareness of the tourism "product" across a wider cross-section of the PWC business community.

Develop revenue-producing opportunities for the CVB that will help to offset new and upcoming promotions through a variety of avenues.

Lead the county's visitor information distribution network through a variety of channels: brochure distribution, new releases assistance and distribution, fax service, email for upcoming events and roundtable meetings for area information service providers thereby increasing knowledge of county offerings over the broadest spectrum and greatest potential for cross-selling opportunities of mutually beneficial events, attractions and activities.

Develop cooperative opportunities that build on PWC's unique strengths in the marketplace: history/heritage, family-friendly, food, fun. Utilize these strengths to develop key messages, packages, programs and products that will keep visitors interested while here and desiring to return without the "been there, done that" attitude. Messages/strengths will then be promoted through all marketing and media channels.

Develop grassroots program that helps residents understand and appreciate the value of the tourism destination that is PWC. Work with local schools, businesses, media outlets, and other partners to communicate and illustrate that vision for PWC.

Consistently communicate successes, issues and ideas that could help develop the tourism product, extend the product lifecycle or enhance the visitor or resident experience from outreach, research and other discovery methods.

Develop channels and maximize opportunity to share research, dialogue and opportunities for additional primary research among destination partners that will help enhance the visitor experience.

Create strategy to make up budget shortfall through creative partnership/advertising from regional attractions in CVB publications, and other channels necessary to achieve strategic objectives.

Develop and maintain research office that creates first generation research reports from which short and long term strategic objectives may be clearly identified and planned.

Because Destination Management requires spending a large amount of time on outreach to the "communities" outside PWC, the client groups that the bureau is looking reach are a number of key demographic markets outside the county. Annually, the CVB develops a Destination Strategy document that lists the CVB's focus for the year. From these

strategies, all of the CVB's operating documents and Marketing Plans are created. The chart that follows outlines the CVB's most recent strategies, based on client-segment.

CVB Destination Strategy	
Focus Market Description	
1.	<i>Leisure Travel Marketing</i> -Includes consumer advertising, trade show attendance, AAA marketing, Email Marketing and other methods aimed at getting the word to individual, leisure travelers. Greatest focus will be on repeat visitation, history/heritage lovers, family weekend getaways and golf travel.
2.	<i>Group Travel Marketing</i> - Increasing exposure of PWC to those that travel in a pre-formed manner, typically by Motorcoach, however could be fly-drive. Educating the tour operators and Motorcoach owners about the new attractions events and develop themed historic and cultural tour opportunities.
3.	<i>Business and Corporate Travel Marketing</i> -Traveling on business-Will include but not be limited to Meetings and Conventions, Corporate Individual travel, and Government travel.
4.	<i>Public Relations and Media Marketing</i> - Enticing more editorial on traditional and non-traditional attractions.
5.	<i>Community and Industry Relations</i> -To raise and build internal awareness in PWC/Manassas about the value of tourism and recruit non-traditional tourism partners for projects and support where a mutually-beneficial relationship can be established.
6.	<i>Visitor Information Distribution</i> -Enhancing individual visitor relationships by providing destination information to the visitor while in PWC and Manassas.
7.	<i>Sports/Meetings/Convention Services</i> -Enhancing client relationship by providing professional, consistent services to meetings/events/tournaments and follow-up reporting.
8.	<i>Web Marketing</i> -Multi-Media Marketing and Design that will include a greater presence of PWC on the web through all travel segments.
9.	<i>Destination Intelligence</i> -Create responsive research mechanism to keep track of success of programs. Develop comprehensive visitor profiles through research intercepts of current visitors. Determine amount of cross-visitation currently receiving and determine from intercepts ways to position and promote small attractions like county owned historic sites to maximize exposure and visitation.
10.	<i>Military/Reunion Marketing</i> -Capitalize on opening of Marine Corps Museum and BRAC realignment to increase number of military reunions coming to PWC. Develop additional opportunities for the groups to visit more local attractions.
11.	<i>Sports Marketing</i> - Develop a presence of PWC in the Marketplace for Sports Events. Showcase PWC as a potential host venue for logical and appropriate tournaments and events.
12.	<i>Partnership Development</i> -Working with hospitality industry to better develop logical links among attractions and services. Developing packages, fostering relationships and helping to facilitate connections to cluster and loop product.

IV. OUTCOMES/BASELINE TRENDS

Tourism is a cyclical industry with competition in the marketplace remaining a key reason that some destinations succeed over time while others do not. For purposes of evaluating PWC, it is not as easy as looking at numbers and determining success or failure based on a trend line. It is critical to look at the numbers, consider the extenuating circumstances involved and how those particular circumstances play into the accompanying chart.

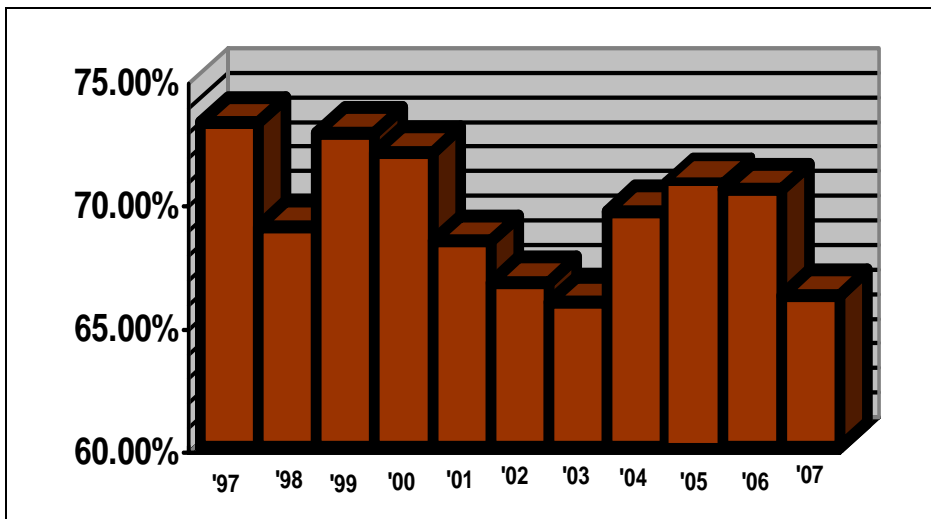
Monthly, reports are obtained and analyzed that identify every jurisdiction's hotel occupancy, average daily room rate, hotel revenue and compares these numbers to the jurisdiction's performance from the previous year.

Quarterly and annually, comparisons are made of visitation to other sites that have a similar draw as the PWC product.

Annually, comparisons are made in Economic Impact to tourism and the county's state ranking among all the counties and cities in Virginia.

Informally, the county shares information with other destinations about industry performance and trends.

Figure 2: Trend in PWC Hotel Occupancy¹⁵



¹⁵ Smith Travel Research

Figure 3: History of Average Daily Room Rate¹⁶

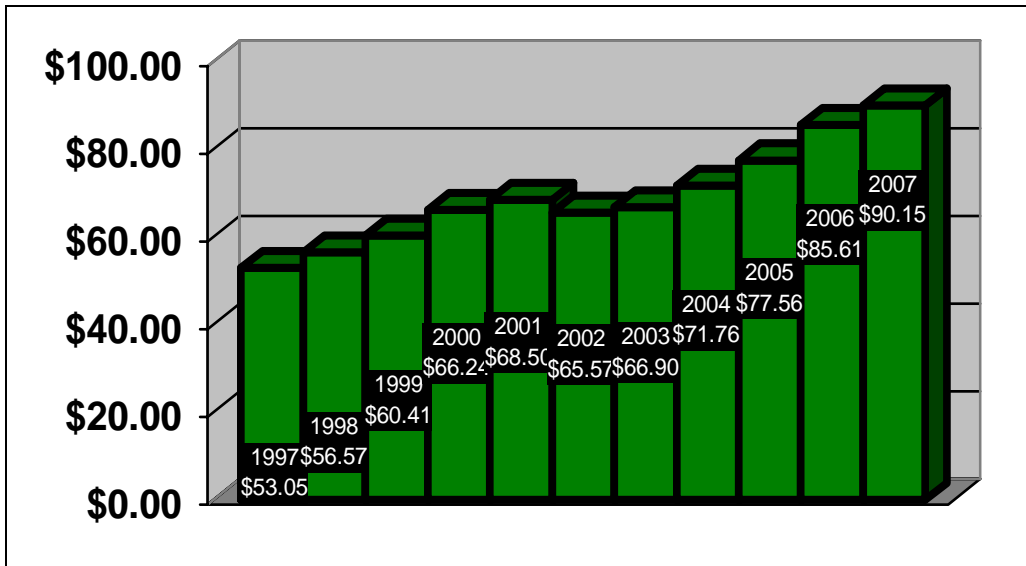
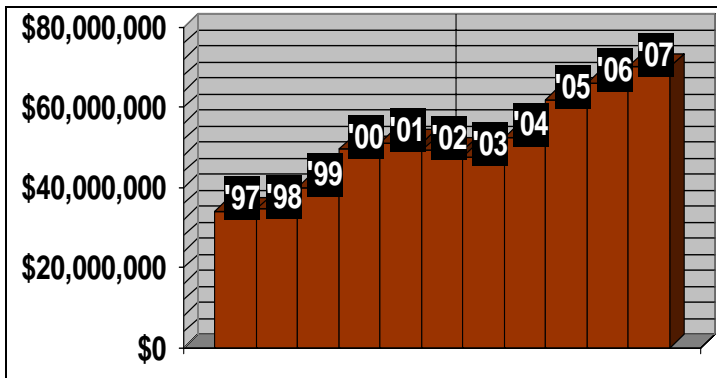


Figure 4: Annual Hotel Revenue¹⁷

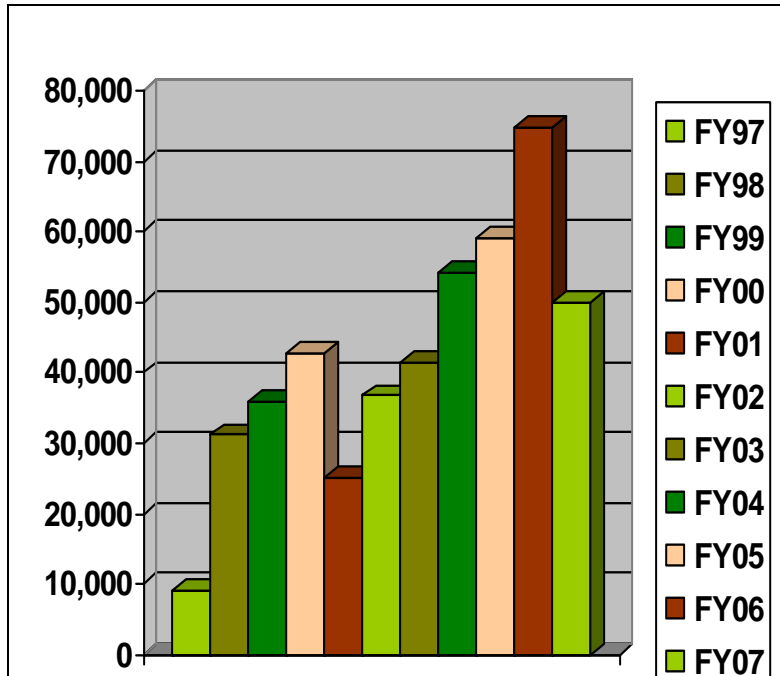


Year	Room Revenue
1997	\$34,027,889
1998	\$34,597,961
1999	\$40,099,112
2000	\$49,538,354
2001	\$51,180,510
2002	\$49,230,263
2003	\$47,663,706
2004	\$52,504,234
2005	\$61,810,469
2006	\$66,081,215
2007	\$70,106,928

¹⁶ Smith Travel Research

¹⁷ Smith Travel Research

Figure 5: Leisure Visitor Inquires¹⁸



In an effort to gather the most comprehensive and up-to-date information on the destination's current position, a survey was conducted of the tourism community for this report. From the survey and the questions posed to both the hotel and attractions in the county, several trends can be outlined.

Major Trends Identified through Survey and Analysis process:

1. Shifting of Primary Market Segments

Movement of PWC from a leisure destination to a corporate/business destination:

- Different needs of business travelers (are needier for business-oriented hotel environment).
- Marketing to the Meetings/Corporate/Business traveler is a costlier endeavor than leisure marketing and is an entirely new endeavor for PWC.

2. Slower than average increases in Hotel Trends

Federal per diem rates are established annually by the General Services Administration and are a mandate for travel by federal government workers. Not only are these figures mandates for the federal government but they are also used as guidelines by government contractors, as well as other state and public employees.

The federal per diem rate is critical to PWC since it dictates up to 60% of corporate and government travel.

The most current federal per diem rates are \$90 for the I-66, Manassas area corridor and \$88 for the I-95 corridor, now called "Prince William/Stafford area", as the attraction of government workers on temporary duty assignment to Quantico has these visitors staying equally in Prince William and Stafford Counties.

¹⁸ Prince William County/Manassas Convention and Visitors Bureau

1. Trend of Declining Occupancy Rates / Falling behind Surrounding Jurisdictions: Marketing efforts would prevent this decline.
2. New Product in PWC will open new markets and market needs for Destination Marketing outreach.
3. Absence of a hotel/conference center or upscale hotel: No investor stepping up to plate.
4. Increase in Traffic problems: Harder for visitors to find their way.

V. *THE STORY BEHIND THE TRENDS*

There are a few primary elements that are distinctive in explaining why county tourism is in its current state. Those are:

1. Shifting of Primary Market Segments
Movement of PWC from a leisure destination to a corporate/business destination:
 - a. Different needs of business travelers (are needier for business-oriented hotel environment).
 - b. Marketing to the Meetings/Corporate/Business traveler is a costlier endeavor than leisure marketing and is an entirely new endeavor for PWC.
2. Government Per Diem rates have inhibited both upscale hotel developments and increase in annual hotel revenue.
 - a. With a lower than average per diem rate (2008 rate currently at \$88-90 depending on location), a “five star” hotel could not sustain a business with the large percentage of government workers and contractors currently coming to the county.
 - b. The annual establishment of the per diem rates is out of the control of the local industry and government. Federally established, PWC, like other jurisdictions in the country, wait for revised numbers to be released each year.
3. Marketing investment not in line with investment by other jurisdictions
 - a. PWC ranks 10th in Economic Impact to tourism in the state of VA (out of 134).
 - b. Budget investment in marketing ranks much lower.
4. Hotel industry is not building as many large-scale hotel and conference centers.
 - a. This is relevant to PWC because several locations in the county are seeking a convention center partner, and at this point are largely relying on a hotel-convention center combination. The latest trends show that this is less likely to happen now.
 - b. This point may also affect planning for very large hotel developments in PWC.

Formal SWOT Analysis¹⁹

During a “fact finding” mission, the Strategic Issues Analysis committee compiled a survey and distributed it to local attractions and hotels. In all, 22 surveys were returned. 10 surveys were returned by hotels and 12 surveys were returned from attractions. Surveys from attractions, represent a collective visitorship of 8,519,571 tourist-visitors and 26,700,130 local residents visiting the attractions. The detail of the questions revolved around the current *Strengths, Weaknesses, Opportunities and Threats* of the destination and of the individual properties. An analysis of the findings is detailed below.

Strengths of the “Destination”

A number of attributes were listed that make PWC a strong destination. Not surprisingly, location topped the list. Travel (especially overnight lodging) is often about:

1. Proximity:

- Airports, including Washington Dulles International and Ronald Regan Washington National Airports
- Major Interstate Highway access, including the north-south Interstate 95 and the East-West Interstate 66
- Military Installations such as Quantico/Ft. Belvoir
- Airports, including Washington Dulles International and Ronald Regan Washington National Airports
- Washington DC

2. Dynamic Local Market:

- Cost effective
- Local corporations such as BAE, Micron, GMU, General Dynamics, etc.
- Sheer volume-size of the market & disposable income
- VFR phenomenon higher than national average

3. Current Attraction Base:

- Marine Corps Heritage Museum
- Manassas National Battlefield Park
- “National Parks” brand: fortunate to have at two sites.
- Other historic attractions and towns such as Manassas, Quantico, Brentsville, Haymarket
- “Unique” sites and activities base

¹⁹ The SWOT analysis was deployed via fax and email and the results shown here is a tabulation of the results. The full list of participants as well as a detail of all comments received is available in Appendix D.

Weaknesses of the “Destination”

1. Lack Of Saleable “Product”/Not Utilizing Features to Fullest Extent:
 - Lack of travel packages
 - Lack of large-scale special events that draws overnight visitors
 - Lack of convention facility
 - Not enough use of waterfront
 - Hotel variety
2. CVB Funding/Outreach:
 - No international marketing due to budget constraints
 - Not enough funding to try “innovative programs”
 - Can’t be a housing bureau
3. Regional Perception
4. Government Per Diem Rate
5. Transportation
 - Traffic
 - Signage
 - Lack of ‘tourist trail system’

Opportunities that could make PWC stronger as a destination

1. Events
 - New special events that would generate travel
 - New sporting events
2. Attractions
 - National Museum of the Marine Corps
 - Waterfront opportunities
 - Historic sites
 - New attraction development
3. Promotions
 - Cross-promotion for more visitation of all sites
 - CVB promoting the area more to tourists
 - Partnerships between businesses
 - Special/Innovative offers to tourists that they can’t find elsewhere
 - International marketing

4. Traffic/Signage

- Creation of multi-loop tourist driving trails
- Shuttle service
- Tourist-focused public transportation

5. Transportation

- Traffic
- Signage
- Lack of Tourist Trail System

Threats (Things that prohibit success that can't be controlled)

1. Transportation

- Traffic congestion
- Lack of Metrorail services to DC/Airport
- Lack of convention facility
- Not enough use of waterfront
- Hotel variety

2. New Hotel Product Flooding Market

- Potential for “over saturation” of same-type hotel product
- Can't be a housing bureau

3. Economy

- Gas prices
- Looming “recession”

4. Government

- National “crisis”
- Regional “crisis”
- Safety issues perceived by tourists
- Adverse publicity from government decisions

What is the one change that could be made to the county that would have the greatest positive and most immediate impact on your visitation?²⁰

1. Transportation

2. Marketing

²⁰ Please note, this question only appeared on the attraction's surveys and was not a question asked of hotel operators in the county.

VI. PARTNERS

The county has several partners that help with tourism efforts. Those are listed below.

PWC/Manassas Convention and Visitors Bureau (CVB)

Recognized as the official Destination Marketing Organization, the CVB is often requested to provide input on local industry, trends, upcoming product as well as provide insight on what local changes will mean to the traveling public as well as the destination partners.

Destination Partners

This includes local parks and recreation attractions, historic sites and organizations, museums and current attractions that service the visitor. Groups like the 22 organizations that took time to fill out the detailed survey for the compilation of this report are very valuable in taking the time to state the current conditions and draw attention to other areas of need that might otherwise be overlooked.

Board of County Supervisors

Critical to the success of the tourism industry in PWC is strong leadership. The leadership of PWC has consistently shown support of the tourism industry and its positive residual effects on the economy.

Virginia Tourism Corporation

The State Office of Tourism promotion, the Virginia Tourism Corporation helps market all of Virginia to potential visitors. There are often shared resources and cooperative marketing programs available to the Virginia tourism stakeholders. The PWC CVB has been successful in securing a number of small matching marketing grants that have helped expand the marketing outreach of the CVB.

PWC Agencies

Planning, Transportation, Communications, Public Works, most specifically, help in attracting visitors either through their work to develop well planned developments, better transportation patterns and travel opportunities, good media coverage, or maintenance of the historic sites within the county.

PWC Residents

Residents can often be referred to as “ambassadors” for the community. They often come into direct contact with visitors. From shops owned by local residents and patronized by tourists to the casual encounter as a local resident helps a visitor read the local roadmap.

City of Manassas

Tourists know no boundaries. A cohesive tourism product jointly shared between PWC and the City of Manassas provides the most efficient and effective use of all resources. Both areas can reap the benefits and jointly share in the unique branding afforded to the larger “destination”.

PWC Business Community

Local businesses also help in the tourism efforts for they benefit from more people traveling through the county.

Other Northern Virginia Destinations and Attractions

As was stated with the partner of the city of Manassas, visitors know no destination lines, and will travel to visit sites of interest. Partners in nearby jurisdictions can serve as ambassadors to send visitors to other attractions. Cross-promotion is critical.

VII. ACHIEVING THE FUTURE VISION

Specific targeting of special events and new product opening have worked in the past to help the county achieve its goals and outcomes with regard to tourism. What it will take to achieve the vision developed by the community in the recent citizen input venues must first be addressed by identifying the future vision of the community.

What is the future vision of the community? It can be answered by finding alternatives or solutions to problems that have plagued the county for ten years or more. Items below are listed in order of priority.

1. **Master Planning:** Through the compilation of an interagency council, led by the Convention and Visitors Bureau and supported by county staff and elected leadership, a broad vision should be mapped out that determines where the county wants to be in five to ten years, and how, through action and resources that vision can be obtained. While not locked in stone, the document can serve as a guide for this evolving destination.
2. **Movement:** The county must find a way to move visitors through the county, through public transportation planning (not just residential transportation), signage and guided trail markers along with individual driving tours.
 - a. **Transportation:** Begin the development of a pilot tourist shuttle service program that will take visitors to points of interest.
 - b. **Wayfinding/Signage:** Form a committee of both transportation officials as well as tourism-industry representatives (especially those that come into contact with the traveling public)
 - c. **Driving Trails:** Develop interpreted, marked trails that can be followed by visitors as they move through PWC on their own.
 - d. **Visitor orientation center:** Establishing a visitor orientation center that will serve as a visitor center, meeting facility and local orientation center for visitors to PWC is essential. A high degree of effort must be taken to develop appropriate partnerships critical to the success of such a visitor information center.
3. **Marketing:** Additional marketing investments are necessary to keep the diversity of visitors as well as keep up with the new hotels and attractions planned for PWC.
 - a. Increased partnerships
 - b. Increased market intelligence

4. Meetings: PWC must identify its “convention” capability, and work toward realizing that potential through the development of an appropriate facility for many different types of meetings in the county.
 - a. Additional cooperation required of industry
 - b. Convention facility
5. Media: Generating positive coverage of PWC will increase awareness of it as a destination along with increasing interest in travel to the county.
6. Management: The last part of the master plan should identify the existing industry implications to the destination of the future and the application of an ongoing program that draws input from the industry on a continual basis.
 - a. Ongoing measure of “how we’re doing” as an attraction
 - b. Continued retention of reserve funds

What will it take to achieve the vision developed by the community?

1. Multi-agency approach to tourism planning and development through the formal master planning of tourism led by the Convention and Visitors Bureau partnering with local businesses and the county government. The plan should have a destination vision that outlines the direction that PWC is heading in terms of tourism promotion and resources (local, regional and state) necessary to realize the vision. This would include transportation planning, wayfinding, visitor information planning, attraction gap analysis and other evaluations as deemed necessary.
2. Convention Center Planning - Because this issue has been looming for a number of years (more than 10), it is apparent that either the “destination” needs to make a decision that this is of primary importance to the county or it is not. If it is of primary importance, then it may require the county to invest funds in studies, planning and may even require an investment in a public-private agreement to develop a convention facility.

***APPENDIX A: RESULTS FROM STRATEGIC PLANNING
COMMUNITY INPUT MEETINGS***

The following responses which have some impact on Tourism were given by participants in the Community meetings, the Internet surveys and the e-mail responses.

Budget:

- Marine Science Museum at Belmont Bay - continue to work with congressional committees to make sure museum happens

Planning:

- More cooperation with COG and its 25 county governments
- Enticements for Federal Government to come to PWC
- Develop a strategic redevelopment plan for the county

- Preserve natural cultural + historic resources
- Need process to identify + prioritize what should be saved
- Need comprehensive county plan for this
- Encourage and promote public art

Technology:

- Public Wi-Fi hotspots

Quality of Life:

- A solid plan and action strategy for parks, trails, and open space
- More aggressive action strategies to preserve historical heritage

Community Services:

- Cultural Center for example place for orchestra

Transportation:

- More public transportation on weekend especially for seniors (VRE, Bus, etc.)
- Traffic is a nightmare; need access to Metro
- Ensure efficient feeder systems to mass transportation systems
- Metro to Woodbridge with feeder system
- Improve public transportation (more buses etc)
- I think the lack of public transportation is a big problem.
- It's hard to get around the County
- The metro should be brought out to PWC traffic would be less
- To extend the metro rail to PWC (this was suggested numerous times through various methods)
- Access to D.C. by a train or public bus
- Metro service to PWC
- Connection of recreation to other basic services
- "River Road Fairfax to Stafford"

Economic Development:

- Nicer malls or a variety of places for people to go
- I wanted to open a dog park for my gold award for girl scouts but was told dog parks are not allowed in PWC. Why not? I want a local dog park.
- Build a Bass Pro shop so people in the area who like to hunt, fish and shoot can get supplies and have a safe controlled place to do their activities

Housing:

- Man I wish this place was more of a city, with tall buildings and restaurants and entertainment concerts etc.

Parks and Recreation:

- Better use of PWC waterfront for citizens
- Parks should be better maintained on an equal basis (trash pick-up everyday); don't just cover up do the job correctly
- Discouraged about how pools open and close during a season
- Inter-connecting pathways for bike paths and walking paths
- Need more maintenance of current parks
- More recreational parks and places. Where families can go and know that they will be safe
- More recreation parks
- More places to fish/parks
- Dog parks
- More parks with lakes open to the public
- Parks were you can walk dogs unleashed
- Move park bond projects forward quickly
- Dog parks
- Support partnerships to increase park land. Silver Lake Park should be operated by Bull Run Mountains conservancy which will add another 200 + acres
- Gateway beautification
- Adult sports programs
- Open the County-owned dove landing property to the public.
- Make it a passive recreation area or park
- Public access to Lake Manassas
- Two additional public access points to Potomac River
- Sidewalks and bike paths on major secondary roads
- One additional public access point to Occoquan reservoir
- More public swimming pools and gymnasium facilities
- Passive use parks
- More historical preservation like Bristow Battlefield

- Increase Park Authority purview to include natural and historic resource stewardship
- Let's have some cultural facilities like playhouses and theaters and so forth.
- Make a local hall so that my prom can be held there.
- Have better parks, bigger fields
- More club sports and better leagues
- I'd like more parks in PWC
- More attractions and activities in PWC
- Don't tear down Old Dominion speedway.
- More places to spend free time: Parks, more malls, stores, shopping centers with necessities like clothes, shoes, and food, recreation centers, skating rinks, more
- Theaters, bowling allies, places for family fun
- More centers for activities: a place to play sports such as bowling, swimming basketball, tennis skating, volley ball, running
- We need a skating rink in Dumfries and more clothing stores
- More recreational areas like a basketball court or a field
- Museums
- One center meant to host school events like Prom at an affordable price.
- More dog/pet parks for owners to take them to play
- Amusement parks or pro-team in the area
- Put up a nightclub
- Sense of community. More community events, parties, services
- Off-leash dog parks, PWC only No. VA that doesn't

Arts and Culture:

- Make murals on sides of buildings
- More music venues
- Cultural opportunities (i.e.: independent music venues, coffee shops, cafes) consolidated in a small area for easy public access and enjoyment

Development:

- Maintain parks
- More parks
- More pools

- New shopping areas are great, but something needs to be done about all the old shopping centers and empty space
- Less development of housing divisions; More focus on current beautification, Less destruction of historical buildings
- Town center. No strip malls. Nice old town feel.

Environment:

- Don't cut down any more trees in Battlefield
- Clean up the Chesapeake Bay

Governance/Decision Making:

- Improve public parks and offer recreational opportunities to everyone including seniors and persons with disabilities
- Position the county to benefit from the economic opportunities of BRAC
- Value and support the military installations near our County
- Additional Countywide festivals/parades to increase Countywide involvement
- More community events

Historic Preservation:

- Maintain historical sites

Community Development:

- City beautification
- Install Welcome signs for each area (For example Dale City, Lake Ridge, Woodbridge etc)
- Encourage Reston Town Center like development to replace Potomac Mills Area

Immigration:

- Immigration hysteria giving PWC anti-business rep.

Physical, Natural, Cultural:

- Resources Center for Appreciation of African-Americans

Tourism:

- One Email:
 “I would like to see Tourism have a higher priority on the Strategic Plan rather than being listed last. The number of hotels in the county continue to grow and so will the occupancy tax. In order to make PWC more of a destination

more of the collected occupancy tax must be spent to promote/market the County in order to continue to see growth in the following statistics.

- Tourism revenue increased by 6.25 percent locally bringing in a total of \$445,671,092 in visitor spending in 2006 The direct spending of domestic travelers in PWC and Manassas supported 6,031 full time and seasonal jobs which generated
- More than \$115,882,763 in wages and salaries.
- Local taxes, including sales and property taxes generated \$7,832,311 for the destination Across Virginia, visitor spending brought in \$17.7 billion in 2006, a 7.2 percent increase over 2005.

Hopefully these figures show the economic impact tourism has on our County and should not be under the Community Development but rather Economic Development for the County Strategic Plan.”

APPENDIX B: RESULTS OF FUTURE COMMISSIONS MEETING'S VISION STATEMENTS

Vision Statements: Cultural Resources

Tourism Attractions

PWC's unique museums draw millions of visitors annually. The Marine Corps Heritage Museum, SciencePort at Belmont Bay and the National Museum of Americans at War attract citizens, students and tourists. In addition, a Museum of Natural History includes an interactive discovery section, a butterfly conservatory and an annex on Bull Run Mountain for a state-of-the-art planetarium and observatory.

Historic Resources

Small museums devoted to local history flourish in Occoquan, Dumfries, Brentsville, Haymarket, Buckland and Manassas. In addition, collections and programs at the new Prince William History Museum recount local history, from the lives of Native Americans to the present, with ample space for future expansion.

Accessible Resources

Information about our history and historic sites is easily available to residents and visitors via both print and electronic communication.

Connected Sites

Residents and visitors alike find it pleasant to go on the history trail that links legacy areas and historic sites by car, bus, bike or foot. This trail traverses the County's historical sites, showcasing our community's connection to all phases of American history.

Public Art

Art adorns buildings, parks and most public spaces where residents and visitors can experience the talents of local artists. Public buildings, including libraries and major public buildings, showcase the work of local artists.

Artists at Work

Residents and tourists can observe artists at work and purchase their creations at artisan centers. Interactive workshops and classes for all ages are a unique and popular feature of these centers. Classes and workshops provide a special opportunity for our senior citizens to share their life experiences and art skills.

Vision Statements: Physical and Natural Resources

From the edge of the Potomac River at Leesylvania State Park - through the County center near Brentsville - to Chapman's Mill at the Fauquier County line; from Prince William Forest Park to the Occoquan River; from sea level to an elevation of 1,280 feet on Bull Run Mountain, PWC offers myriad ways to connect with the varied and beautiful landscape.

Interconnected Trail System

We have a large, interconnected system of multi-use trails traversing varied settings. Trails run along the Potomac and Occoquan Rivers. Passing through preserved mountains, woodlands, grasslands and wetlands, trails provide spectacular views and offer a unique experience of natural settings. Well marked and maintained, our trails are used as a recreation resource for walking, hiking, running, biking and horseback riding.

Open Space Preserves

Areas such as Bull Run Mountain and North Forks Wetland Bank have thrived and are accessible.

Vision Statements: Recreation

Vibrant Waterfront

The waterfront is accessible to citizens in an environmentally friendly way that allows for appropriate commercial uses. Through blueways and other mechanisms, residents enjoy additional access points to the Occoquan and Potomac Rivers, Lake Manassas, Lake Jackson, Lake Montclair, Silver Lake and other waterways.

Vision Statements: Transportation

Multimodal System

The public transportation system combines several modes, including bus, para transit, light rail and ferries. Bus service is accessible from all neighborhoods to business hubs, shopping centers and schools, reducing reliance on the yellow school bus service. The first segment of an intra-

county light rail system connects Manassas, Dale City, VRE and Metro stations. VRE's frequent, high-speed, reliable service meets the needs of commuters and tourists and includes the Gainesville/Haymarket corridor. Recognizing 'slugging' as a viable commuting option, the transit agency maintains an organized system to ensure the flexibility associated with slugging.

Metro Service

The County has Metrorail service on both ends of the County including stops in Woodbridge, Quantico, Manassas and Gainesville.

Comprehensive Public Transportation

Regional transportation entities provide a comprehensive public transportation system with affordable, accessible services 24 hours a day, seven days a week, providing cross-county connectivity and access to all major points within the metropolitan area.

Attractive Roadways

Construction standards for all roads require trees and additional landscaping, aesthetically pleasing lights and pedestrian/bicycle access.

Manassas Airport

An enhanced Manassas Regional Airport offers a variety of services, including commuter airline schedules and commercial flights. The County, through a partnership with the City of Manassas, encourages use of the airport and its environs. The airport is a transportation hub with regular flights to support business and personal travel. Planning is underway to study the feasibility of providing some international air connections.

Helicopter Transportation

Heliports now offer affordable, regularly scheduled transportation to Washington, D.C., Richmond and Baltimore from PWC.

Air Travel Research

The County is known for premier flying car technology, jetpack and personal air travel research funded through grants for joint research by local businesses, higher education facilities, airports and research institutes.

Water Ferry/Taxi

Water ferry/taxi provides transportation to Washington, D.C., and Maryland along the Potomac River using hovercraft, hydrofoil and other propulsion technologies. These services are used for commuting, as a regular means of transportation, and for residents and tourists to reach historic towns and sites along the County's shoreline.

*APPENDIX C: VISITOR ATTENDANCE FIGURES FOR PWC
ATTRACTIONS*

<i>Attendance at PWC Attractions by Fiscal Year 2004-2007</i>				
<u>Attractions</u>	FY2004	FY2005	FY2006	FY2007
Center for the Arts	8040	15,029	14,465	13,308
Leesylvania State Park	297,775	274,212	290,264	327,250
Manassas Museum	15,582	17,531	14,092	13,445
Manassas National Battlefield	762,830	718,271	774,215	596,058
Mill House Museum	8,371	8,853	8,429	8,133
Occoquan/Mason Neck Wildlife	6,447	21,135	21,231	15,813
Potomac Mills Mall	27,817,155	25,852,789	No Longer Tracking Visitation	
Prince William Forest Park	218,736	228,614	200,381	219,295
Splashdown Water Park	140,081	118,097	141,102	167,193
Weems-Botts Museum	736	452	549	808
National Museum of the Marine Corps				382,600
<u>Visitor Information Centers</u>				
Manassas Visitor Center	42,421	34,129	27,673	22,766
Manassas Welcome Center (I-66)	93,703	89,046	97,449	88,472
PWC Tourist Information Center	43,312	38,410	31,398	27,777
<u>Event Venue Attendance</u>				
Nissan Pavilion	393,460	340,737	346,571	398,761
Potomac Nationals	153,409	158,931	146,752	170,575
Old Dominion Speedway	62,000	54,000	28,300	32,400
<u>Major Special Events</u>				
July 4th-All PWC Events	33,187	54,500	55,000	53,000
PWC Fair (Aug)	71,000	76,000	61,000	75,000
Bugout (Sept)	3,000	5,000	15,000	1,760
Sugarloaf Crafts Festival (Sept)	20,000	20,000	10,000	11,983
Haymarket Day (Sept)	10,000	3,000	3,500	5,500
Occoquan Fall Arts & Crafts Festival	200,000	150,000	150,000	130,000
Vpstart Crow	2,024	1,950	5,988	2,244
Haunted Barns/Trails at PWC Fairgrounds	2,190	2,390		not held
Annual Harvest Festival (Oct)			440	550
Annual Manassas Fall Jubilee (Oct)	45,000	53,000	25,000	25,000
Annual Festival of Freedom (Oct)	6,981	8,000	4,000	not held
Manassas Christmas Tree lighting	1,000	6000	5000	25000
Manassas Christmas Parade	cancelled	55000	50,000	40000
Holiday Open House-Manassas Museum	cancelled	1000	140	700
A Christmas Carol/ A Civil War Christmas	2050	1200	850	
Cherry Jubilee (Feb)	200	Cancelled	25	
St. Patrick's Day Parade (Mar)	5500	5500	5,500	est. 5000
Bugout (May)	3500	4900	3,284	2772
Charter Day-Dumfries	400	400	200	100
Occoquan Spring Arts & Crafts	150000	80000	130,000	30000

Festival				
Manassas Heritage Railway Festival (June)	20000	Cancelled	25,000	30000
Annual Kids & Family Expo (April)			1,501	3500

APPENDIX D: RESULTS OF FORMAL SWOT ANALYSIS

<p>A. Please lists strengths of the destination that are relative to the success of your business: (Example: close proximity to DC allowing me to host School groups interested in staying close, but not in town)</p>	<ul style="list-style-type: none"> ■ Proximity to DC; more visitors come from DC to the park rather than staying locally ■ Proximity to Dulles airport; increased number of visitors who stop by coming/going to airport ■ Cost effective ■ Unique (you can camp or RV while visiting DC) Close proximity to DC and other sites (i.e. - Marine Corps museum) Experience/Branding - many people travel around just to visit national parks, so the experience and "brand" are a positive. ■ Close proximity to DC allowing me recommend our hotels to school groups interested in staying close, but not in town. ■ Our largest strength now is the draw to the Marine Corps Heritage Museum ■ Virginia (west and downstate) is a big market due to the Civil War history. ■ We seem to be tapping into the market for friends and relatives staying with County residents. We have seen a percentage of our guests for large programs coming with out of town family members and friends. ■ Our rental market for weddings brings in a significant portion of out of town guests; they seem to be staying in Centerville, Fairfax, and Alexandria. ■ Location—close to Old Town Manassas with its quaint shops and restaurants, and to historic destinations like The Manassas National Battlefield. ■ Close personal attention from the staff and more intimate programs. ■ Proximity to DC, busy I-95 thoroughfare ■ Interesting historical sites, a vibrant arts community, beautiful parks, Old Town Manassas, Occoquan, Quantico Marine Corps Museum ■ Market Size ■ Location is attractive to business. Close enough to the city to enjoy big city perks such as professional sports, museums, arts but in the suburbs ■ We exist in the middle of some of America’s richest historical sites and the birthplace of our heritage. ■ Close proximity to Quantico, Ft. Belvoir & DC. Easy access to/from I-95, thus exit has more to offer than the others around DC. ■ Close proximity to Quantico, Ft. Belvoir & DC. Easy access to/from I-95, thus exit has more to offer than the others around
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	<p>DC.</p> <ul style="list-style-type: none"> ■ Close to I-66, BAE, Micron, GMU, Winery, Battlefield, DC. ■ Senior Groups; Battlefield, School Groups, Retail Construction. ■ Location to the city, Quantico, Ft. Belvoir & the Mall ■ Proximity to DC, General Dynamics, Metro and other government and construction business, Interstate. ■ Close Proximity to I-66. ■ Proximity to I-66. Only 16 miles from DC but far enough away to offer better rates for those that are price conscious. ■ Corporate Companies Innovation Drive, George Mason Freedom Aquatics Ctr. ■ Close proximity to I 95, DC, Quantico, Ft Belvoir ■ Close proximity to I-95 travel corridor and Marine Corps Base Quantico.
<p>B. What weaknesses exist in PWC that could be changed (In other words, not out of our control)? How could they be changed?</p>	<ul style="list-style-type: none"> ■ Work with local historical/cultural destinations to create package tours; stay at this hotel for 2 nights and receive special tour package to visit 2-3 local sites (would include all admission fees to sites); reason for people to stay in PWC rather than commuting from elsewhere ■ Transportation is always a problem; provide low-cost shuttle service (trolleys) that make a continuous loop connecting various destinations ■ Develop more outdoor/large scale special events; will take time to develop an audience so investment is not short-term. ■ Provide grant money or assistance to local groups for marketing; many organizations/institutions that have events or sites worth visiting do not have the creative staff or funds to create marketing campaigns ■ Traffic. Many people do not stay here because they would need to take I-95 in to visit DC. It is also difficult just to get around the county without a vehicle or as an outsider. ■ Some kind of a themed bus route such as a "Heritage Route" or "Parks Route" might encourage more visitors and locals to visit our sites. ■ Perception. People perceive PWC as the 'suburban jungle.' We could use our market (as you did with the video) to fight this perception and to show people that they don't need to go far to get a 'small town' feel. ■ Waterfront. PWC has a lot of waterfront along the Potomac and other rivers and creeks. People are very attracted to waterfronts both in terms of a developed waterfront with shops and restaurants, but also an undeveloped waterfront. More could be done to open up the PWC waterfronts to the public. ■ Although in recent months we are doing better, our teamwork and networking has been weak. The CVB has provided opportunities, but our response from the tourism community has been weak. As we build momentum, hopefully, we will draw more participation from other tourism partners. ■ Our greatest weakness is not having a 4 or 5 star hotel property. ■ We would like to see more of a focus on the attractions that make up the reason folks would stay here and not as much on trying to capture the overflow from the DC market. ■ We need better lodging options.

	<ul style="list-style-type: none"> ■ More traffic control in Old Town Manassas to support the businesses already there and to attract new business that could be pedestrian-friendly. ■ No public transportation on the weekends ■ NO Convention Center. The lack of a convention center is a big handicap. ■ Lack of bike and walking trails. ■ We need more access to the water-----Potomac River/Lake Manassas ■ We need a new Minor League Baseball Stadium More hotels ■ larger hotels with conference space ■ more public transportation in non-commuter patterns (i.e. coming <i>from</i> airports and DC in the morning, returning evening or late night ■ Residents need to have more pride in community. PWC has more to offer then it knows ■ The Park Authority is a County government agency. ■ Per Diem Rate ■ Limit of Hotels ■ Per Diem Rate ■ Limit of Hotels, ■ Per Diem Rate ■ GVT. Rate ■ Tourist Center, Public Transportation. ■ More Tourism \$\$ to promote the destination and the attractions. ■ Increase in shuttle service and more local signage ■ No conference center ■ No infrastructure to market to meeting planners. ■ CVB doesn't have enough marketing funds. The CVB could be given more of the bed tax. They are working to increase our business and more "heads on beds" means more revenue coming into the area. ■ Not yet considered a destination city. We do not have the facilities to be a draw for major youth sporting events, or conventions. ■ We do not give our CVB enough money to be a booking agent which would allow them the ability to be a housing bureau for large conventions coming into the area. ■ None listed ■ Make more attractive to weekend travelers ■ Not many conference center-type hotels that can accommodate larger quantities of guests, breakout rooms and banquet facilities all under the same roof. ■ Lack of public transportation, door-to-door for tourists coming to D.C. w/o their own cars.
<p>C. Based on your business, what weaknesses exist within your product that you would like to change?</p>	<ul style="list-style-type: none"> ■ Lack of internal transportation network of roads ■ Lack of name recognition. ■ Strengthen rental business. ■ We need to be open more. ■ Get the word out to local residents and teachers that we are here and offer low-cost and educational entertainment options. ■ Previous lack of visitor focus. ■ NONE

	<ul style="list-style-type: none"> ■ Improved facility. ■ Local community isn't aware of us. ■ Area still defined by Potomac Mill Outlet very unfortunate ■ Lack of funding. ■ Too expensive in Northern Virginia ■ Too expensive in Northern Virginia ■ Too expensive in Northern Virginia ■ Not enough attraction to draw me to Manassas & Prince William. ■ Over-crowding housing with increase traffic problems. ■ Attractions spread out. Not a lot to do. No major attraction. Nothing replaces the popularity of Potomac Mills when outlet shopping was at its peak at this location. ■ Too many hotels; not enough corporations. ■ Not much to do in the area. ■ Traffic
<p>D. What opportunities exist that will make us (PWC) stronger as a destination?</p>	<ul style="list-style-type: none"> ■ Access to DC (but we lack quick access; I-66 is a nightmare any time of day) ■ Sheer number of related historical sites for cross-promotion and package marketing ■ Better traffic improvements, public transportation improvements and development controls will hopefully help stem the tide that causes PWC to be looked at as a sea of development. ■ A fully funded CVB that can and would provide a strong presence in the tourism markets. ■ History, Potomac River, golfing, and military installations ■ We have so many entertainment and educational, historical and cultural options within close proximity. ■ We have small towns, more suburban areas, and lovely landscapes. ■ Facilitate new partnerships between local businesses to offer potential visitors special offers and special treatment that they won't find elsewhere. ■ A new Minor League Baseball Stadium;. ■ More hotels. ■ We don't promote the county well. Why would you visit PWC? ■ You will still be able to afford to throw a ball with your children in a park - it's for free! ■ County Events, Historic Destination ■ County Events, Historic Destination ■ Marine Museum ■ Vast amount of activities ■ Waterfront Opportunities ■ FBI as a foster business opportunity. ■ Sporting Events ■ Better co-marketing among similar organizations or co-located attractions/amenities.
<p>E. What threats, (those things that we can't do anything about), jeopardize our position as a destination?</p>	<ul style="list-style-type: none"> ■ Traffic-traffic-traffic ■ gas prices ■ lack of Metrorail service to DC and airport ■ Economy ■ National crisis, regional crisis, safety issues. ■ Gas Prices.

<p>(Example: Sniper; gas prices, economy, etc.) Think about the region when answering this question.</p>	<ul style="list-style-type: none"> ■ Traffic, traffic, traffic! ■ Adverse publicity resulting from anti-immigrant measures in county government. ■ Gas prices (many of our tourists come on buses) and predicted recession ■ Traffic ■ Housing Market ■ The federal economy. ■ Traffic Congestion during Rush Hour & Summer Tourist Season. ■ New Hotels may flood market. Economy (recession). ■ Traffic Direction (rush hour traffic congestion). ■ New Hotels May flood market. Economy (recession). ■ Over abundance of hotel rooms in the area. ■ Close proximity of the new Gaylord National Resort and Convention Center; Over-saturation of new properties. ■ Distance from Airport. ■ Too many hotels being built in the area and not enough industry to fill the rooms. We will rely on the leisure market to offset that but need a convention center or large sporting complex in order to get the teams here. ■ Rising gas prices, and looming recession ■ Price of gasoline will force tourists to stay closer to home; this also provides an opportunity.
<p>F. What (in your opinion) is the one change that could be made to the county that would have the greatest and most immediate impact on your visitation (in a positive way)? (Please note: This question was directed to attractions only)</p>	<ul style="list-style-type: none"> ■ Better traffic and public transportation planning. ■ A fully funded CVB!! ■ Marketing to Europe (International Travel) ■ More cooperative efforts to market the area as a destination for entertainment, shopping, dining, education etc. ■ Establish public transportation routes on weekends. ■ A new Minor League Baseball Stadium ■ Improved roads/traffic ■ More/better public transportation ■ Signage that highlighted quality. ■ The economy. For tourists - if people are secure in their finances they can take time to have fun and will spend money on a vacation. ■ Improved mass public transit.