PROJECT REPORT

TOURISM SUPPORT & DEVELOPMENT PROGRAM

TOWN OF APPOMATOX AND

VIRGINIA'S REGION 2000 PARTNERSHIP

January 2014

Virginia's REGION 2000 PARTNERSHIP

PGAV PLANNERS

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TOWN OF APPOMATTOX • TOURISM SUPPORT & DEVELOPMENT PROGRAM

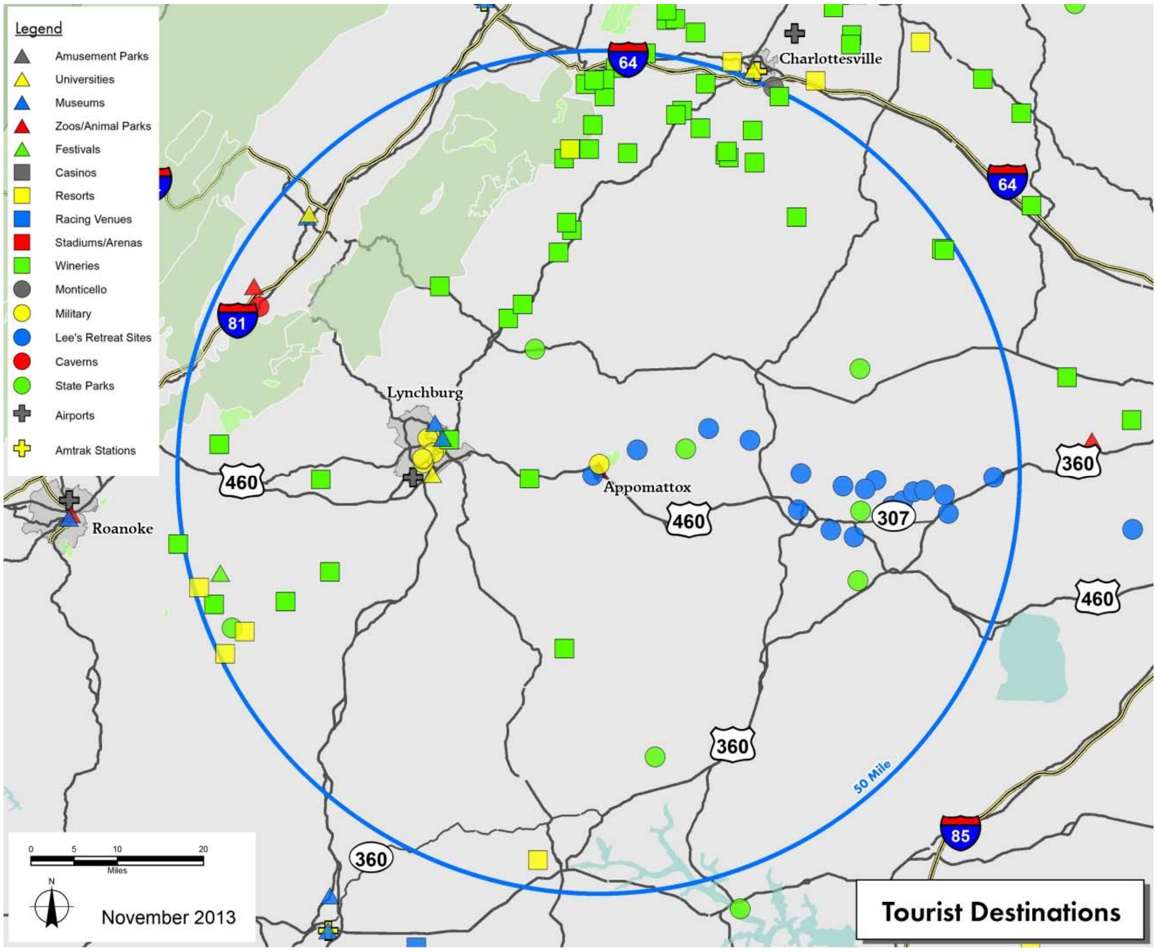
PURPOSE OF REPORT

The purpose of this report is to summarize the work conducted by PGAV on behalf of the Town of Appomattox and Virginia's Region 2000 Partnership Economic Development Council (Region 2000). It discusses the principal data and findings associated with that work and provides suggestions as to the ways in which the Town and Region 2000 can use this information to further the Town's goals for attracting the retail and lodging uses that are necessary to further develop its tourism economy.

SUMMARY

In the first task of this project, we researched available data on the retail outlet industry and the desired site demographics of top-tier outlet developers. Based on this data alone, initial impressions suggested that Appomattox might be at a disadvantage in capturing the attention of top-tier retail outlet developers, namely Simon and Tanger. However, based on observations during our three-day field visit in August, we firmly believe that the data alone does not accurately portray the full tourism situation. Appomattox is in a more favorable situation today to begin growing its tourism-related retail development - including lodging and retail outlets - in an incremental fashion. The following discusses the key observations that more accurately explain the situation in Appomattox as it operates in the Lynchburg tourism halo.

First, the Lynchburg area's nearly 2 million visitors per year do not spend their stay solely within the city. Rather, typical visitors fill their stay with short excursions and daytrips to visit the natural, historical, and recreational attractions in the surrounding area. These include the Museum of the Confederacy and Appomattox Courthouse National Park; however, other key tourism sites such as the D-Day Memorial and Jefferson's Poplar Forest retreat are with a 15 to 20-minute drive. The 'Tourist Destinations' map on the next page illustrates the dense network of varying tourist destinations surrounding Appomattox. So, although Lynchburg is the primary point of entry for out-of-town visitors (primarily because the major industries and Liberty University in Lynchburg have fueled the lodging market in the immediate vicinity of the city), both tourists' time and dollars are diffused throughout the region. We believe that if lodging facilities existed that are not typical chain designs, Appomattox could be a tourism "jumping off" point just as effective as Lynchburg. The right lodging facility as a point of beginning for a visitor's tourism journey could not only enhance the experience but create a different way of thinking of the combination of historic and recreational opportunities that make up the Central Virginia area.



Second, it became clear to us that the network of local tourism offices recognize this and work in a competitive but collaborative way to increase both the number of visitors and the length of their stay. Their promotional efforts and increasing public recognition of the trove of historic and recreational sites within the region have been begun to change visitation patterns. Based on annual visitor surveys conducted by local tourism entities, the primary purpose of visitors' trips to the area in and around Lynchburg has recently changed from 'visiting friends and family' to 'pleasure', an important tourism benchmark.

Finally, the growing number of out-of-town visitors interested in Civil War history due to the upcoming Sesquicentennial celebrations increases the incentive to accelerate marketing efforts. It is to this end that PGAV, along with the Town of Appomattox and Region 2000, seek to re-engage the lodging and retail development industries to take a fresh look at the opportunity in Appomattox.

We are making initial attempts to reconnect with the Marriott contact regarding the themed lodging concept that was explored pre-recession. Additional contact has been initiated with Taubman, an owner/manager of 28 regional and outlet malls in the United States, and Simon Property Group, developer of the Premium Outlets portfolio. We will continue to work toward facilitating these discussions with hoteliers and retailers. As these efforts progress, it is imperative that the Town of Appomattox, Region 2000, and PGAV continue to follow up on these leads.

APPOMATTOX AND LYNCHBURG TOURISM SITUATION

The following is a summary of the research findings regarding our assessment of the tourism situation for Appomattox. The Town is centrally located as an ideal jumping off point for traveling Civil War and American history enthusiasts and households who plan on taking short day trips throughout the Central Virginia region. There is also potential for Appomattox to establish itself as an alternative business and conference venue to meetings held within the Lynchburg area.

Currently, Appomattox faces challenges in increasing its position among travelers as they make plans to visit Central Virginia, particularly as a place for an extended visit including an overnight stay. Based on conversations with the Town, staff at the Appomattox Courthouse National Park, and Museum of Confederacy, there is a need for lodging under the flag of a major brand hotelier. The Town also lacks ancillary activities for travelers to extend their stay such as outlet retail. The question of whether retail or lodging should be pursued first is really not a dilemma. Developing appropriate lodging, retail, or both in concert are all necessary to increase the value proposition of Appomattox's historical assets to the traveling household.

In order to leverage synergy with Appomattox's historical assets, we strongly recommend the Town continue to pursue previous discussions to develop a themed lodge with appropriately sized meeting space for both business and historical groups. There is a compelling opportunity for historically themed travel lodging in Appomattox due to its central location, access to 460, and prominence in Civil War and American history. In our assessment during the field visit, the key assets are the Courthouse National Park and Museum of the Confederacy. Proposals for commercial development should be mindful of these assets during conceptualization, planning, and deployment. Culminating in April 2015, the Sesquicentennial activities taking place throughout the Commonwealth pose a unique and time-sensitive opportunity for Appomattox to establish lodging and retail development and market itself to increasing numbers of travelers.

It is important to keep in mind that capturing the visitors to the nearby historic and recreation attractions is only one potential market for Appomattox. If appropriate lodging and supporting retail development can be attracted to the area, there is an added opportunity for Appomattox to capture major employer, Liberty University, and other area higher education institution events. These might include retreats, meetings, receptions and other similar activities of a smaller scale where a location that is in a pleasant setting but not too far from Lynchburg is desirable and where side trips to the Museum and other historic sites can be offered.

We know from discussions with Museum representatives, Chamber staff, and others that opportunity to capture the historic site and recreation visitors and the types of events we are describing above are being lost because the facilities aren't there. Also, because the lodging component that we envision is unique, the facility to be developed in Appomattox would not be a competitor to the larger conference/smaller convention facility that is the subject of discussions between Lynchburg and Liberty University.

The primary threat to Appomattox's endeavor to commercial development is missing the window of opportunity created by the celebration of the Sesquicentennial. The Town should diligently pursue lodging and/or retail development before the conclusion of activities in 2015. Concurrently, marketing efforts should ramp up Appomattox's historical prominence in the minds of travelers. At a minimum, the Town must further leverage partnerships with the established tourism-marketing infrastructure in Lynchburg and surrounding counties to increase its exposure. Appomattox's historical legacy as the location of the end of the Civil War may influence how the Town is marketed in designated marketing areas outside of the Southeastern United States.

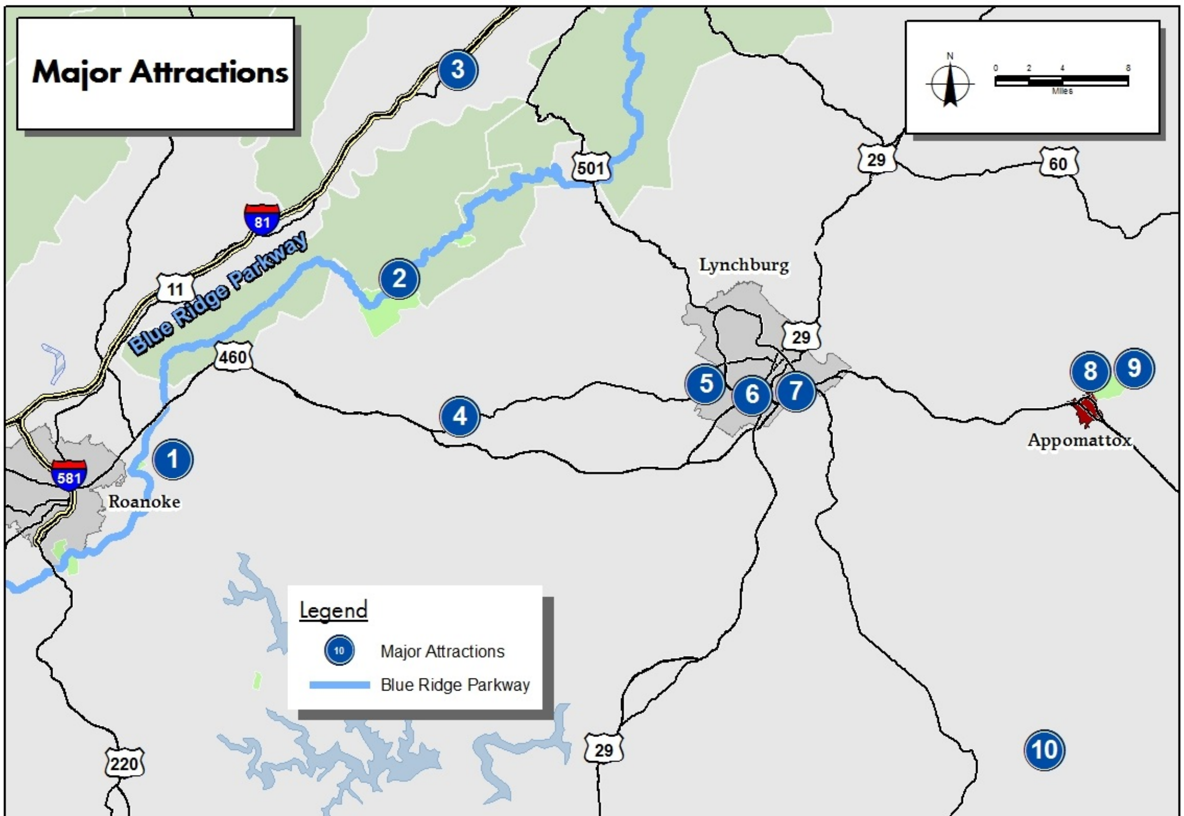
RETAIL OUTLET INDUSTRY

As we previously reported in our field visit, Appomattox, based on data alone, may face a heavy lift in attracting the attention of first-tier retail outlet developers, namely, Tanger and Simon Property Group, the two we focused on in our initial research. However, while these two developers hold a large majority of retail outlet space, there are still a host of retail developers well suited to designing a retail environment that can capitalize on Appomattox's unique geographic location and historical assets.

MAJOR RETAIL AND HOSPITALITY LOCATIONS

The following maps and analyses further illustrate Appomattox's value proposition to traveling households. Arguments supporting Appomattox's appeal are made in terms of the Town's proximity to the various recreational, historical, and culinary attractions in the Lynchburg area and surrounding counties.

The map below illustrates Appomattox's position within the 'halo' of major attractions in the Lynchburg area and surrounding counties. This map shows that while Lynchburg, with its regional airport, is the main point of entry, that tourism activity is diffused throughout the region. Attractions from varying categories promising activities to diverse households are all competing for a portion of visitors' time.



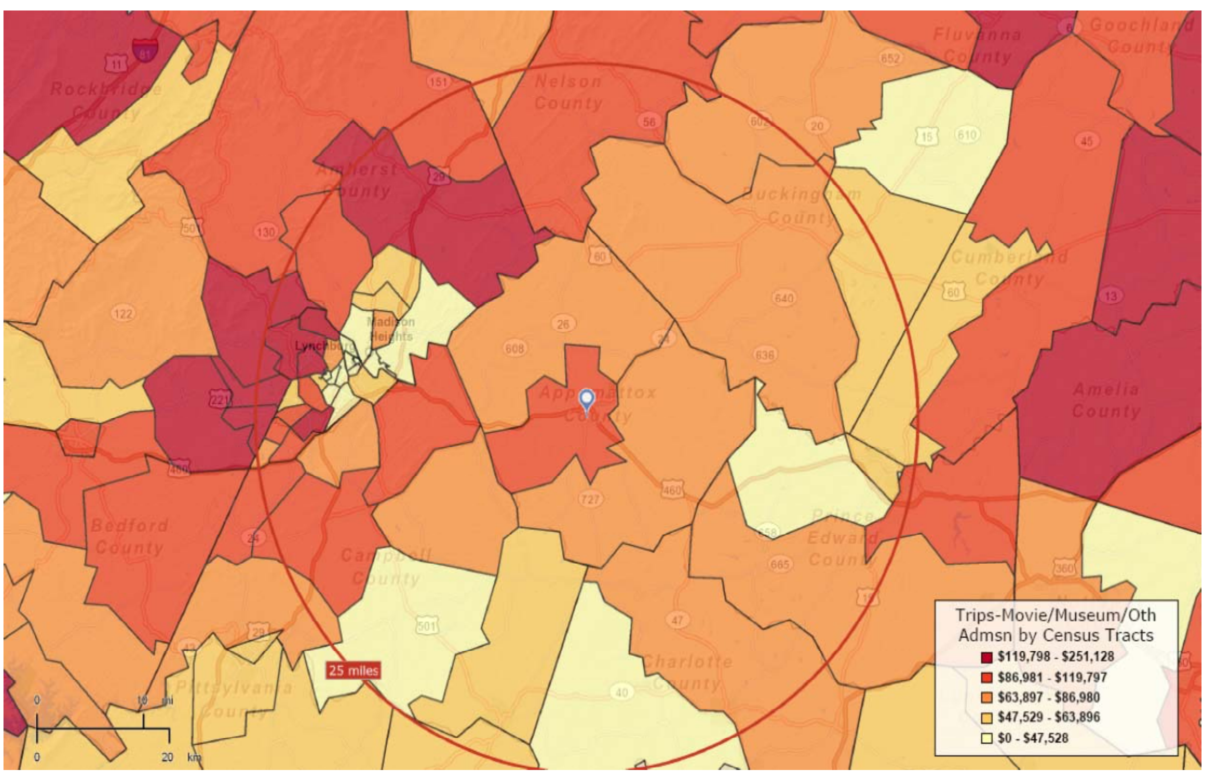
	Attraction	Description	Drive Distance from Appomattox
1	**The Blue Ridge Parkway**	Scenic National Parkway and All-American Road running through the Blue Ridge mountain chain, part of the Appalachian Mountains • 15.2 million visitors in 2012, the highest in the National Park Service	66 Miles
2	**Peaks of Otter**	Preserved as part of the Blue Ridge Parkway in the Jefferson National Forest, the three peaks are closely situated in the Blue Ridge Mountains with Abbott Lake below.	54 Miles
3	**Natural Bridge of Virginia**	Unique geological formation and National Historic Landmark.	56 Miles
4	**The National D-Day Memorial**	Honors the Allied forces that participated in the invasion of Normandy in World War II.	44 Miles
5	**Thomas Jefferson's Poplar Forest**	Thomas Jefferson's personal retreat. Designated a National Historic Landmark.	29 Miles
6	**Liberty University**	The largest private, nonprofit university in the nation, the largest university in Virginia, and the largest Christian university in the world with residential and online enrollment of 100,000. Situated in the Blue Ridge Mountains on more than 7,000 acres. • Liberty University attracted 166,000 out-of-town visitors in 2011-2012 • These visitors generated 82,500 hotel room nights in the Lynchburg MSA associated with $6.5 million in hotel revenue.	22 Miles
7	**Snowflex Centre**	Year-round skiing, snowboarding, tubing center for snow sports enthusiasts.	22 Miles
8	**Museum of the Confederacy – Appomattox**	Newest part of the Museum of the Confederacy System detailing events leading up to, during, and after the Civil War.	2 Miles
9	**Appomattox Courthouse National Park**	National Historical Park commemorating the end of the Civil War. • 72,000 visitors in 2012	4 Miles
10	**Red Hill Patrick Henry National Memorial**	Final home and burial place of Patrick Henry.	28 Miles

Appomattox is positioned well within this halo with its compelling historical assets and a near-mid-point location between Roanoke on the west and the Richmond metropolis on the east. The opportunity exists to further develop its potential as a tourist attractor and market itself more robustly among its local competitors with additional development in traveler lodging and retail.

In the course of PGAV's initial work, a variety of data was gathered and analyzed in 10, 25, 50, and 100 mileage distance rings centered on Appomattox. This information looked at a variety of demographic, economic, and tourism information within these rings. This information was summarized in a Progress Memorandum dated August 18, 2013 and is included as an Appendix to this report. However, it should be noted that the market data that is provided in the following pages of this document represents data not a part of the Progress Memorandum of August 2013 and in some instances will represent updated or additional information.

25-Mile Market Ring

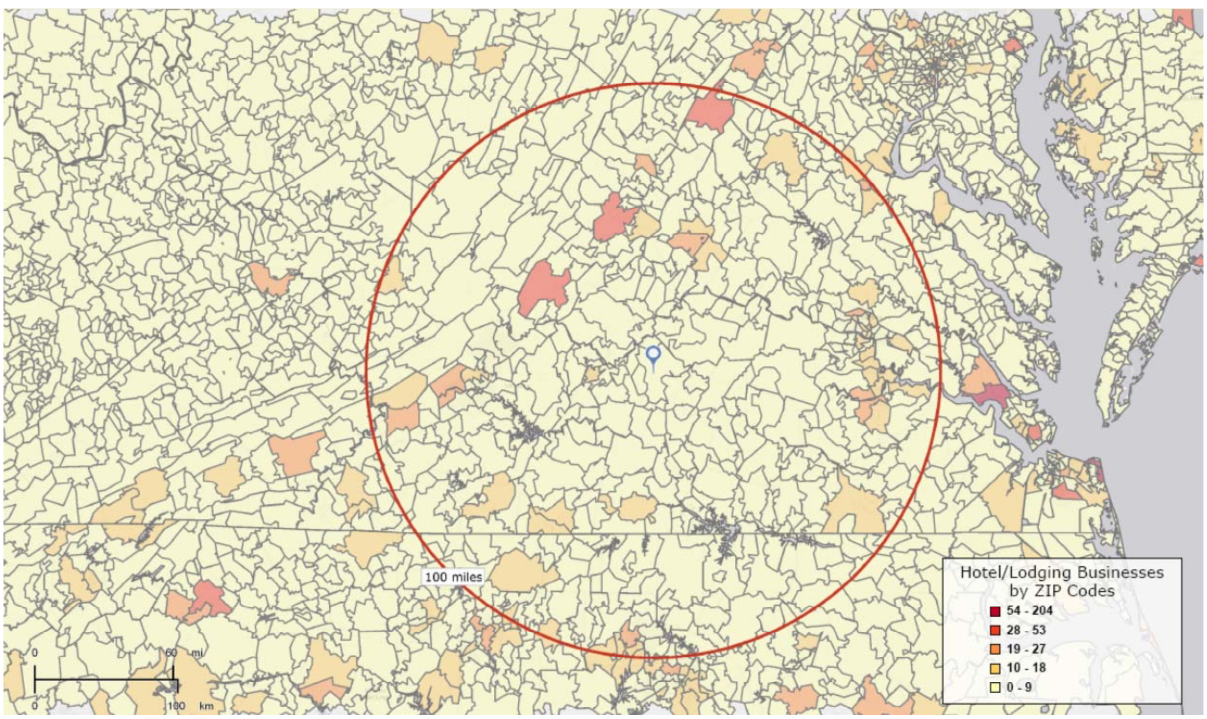
The map below shows the density of admissions-based entertainment expenditures made by travelers to venues such as movie theaters and museums. The 25-mile ring is centered on the Town of Appomattox. The higher level of traveler spending is shown in dark red, the lowest in light yellow.



Surrounded by the highest levels of admissions-based entertainment expenditures by travelers in Central Virginia, and by extension, greater tourist activity in general, Appomattox is in a prime location on US Route 460 to serve as the one-night stop to households between excursions taking place in the Lynchburg area and surrounding counties.

100-Mile Market Ring

The map below shows the density of hotel and other traveler lodging organized by zip code in a 100-mile market. Zip codes with the highest number of lodging establishments are indicated in red, the lowest in light yellow. The 100-mile market ring is centered on the Town of Appomattox. Appomattox is surrounded by zip codes with the highest number of lodging establishments in Central Virginia that indicates a development opportunity for lodging to serve those households traveling on excursions or day trips through the area.



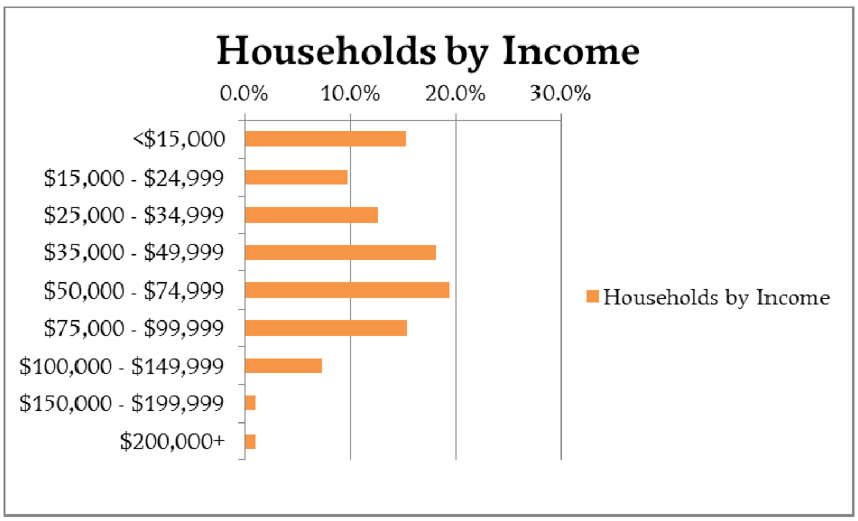
The following tables and charts provide demographic and retail sales potential information of the residential population in 10-, 25-, 50-, and 100- mile market rings surrounding Appomattox. We provide this information to better illustrate the kind of retail sales opportunities that exist in Appomattox. We encourage the Town to use the information contained in this document in marketing sites to potential hotel and retail developers.

DEMOGRAPHIC AND RETAIL SALES POTENTIAL OF RESIDENT POPULATION

10-Mile Market Ring Demographics

The table and chart below provide a summary of the demographic information for the 10-mile rings including population, housing, and income data.

Summary	Census 2010	2012	2017
Population	16,120	16,475	17,176
Households	6,500	6,606	6,959
Families	4,678	4,713	4,971
Average Household Size	2.5	2.5	2.5
Owner Occupied Housing Units	5,149	5,110	5,404
Renter Occupied Housing Units	1,351	1,496	1,555
Median Age	42.4	43.0	44.2

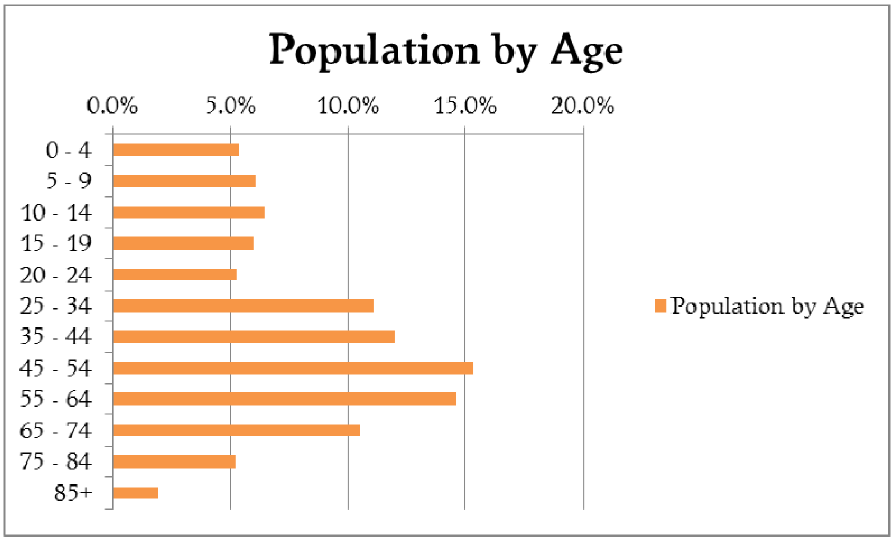


	2012		2017	
Households by Income	Number	Percent	Number	Percent
<$15,000	1,008	15.3%	1,089	15.6%
$15,000 - $24,999	641	9.7%	530	7.6%
$25,000 - $34,999	839	12.7%	721	10.4%
$35,000 - $49,999	1,197	18.1%	1,081	15.5%
$50,000 - $74,999	1,283	19.4%	1,249	17.9%
$75,000 - $99,999	1,020	15.4%	1,516	21.8%
$100,000 - $149,999	482	7.3%	601	8.6%
$150,000 - $199,999	67	1%	93	1.3%
$200,000+	68	1%	79	1.1%

Median Household Income	$44,001	$50,782
Average Household Income	$54,286	$60,114
Per Capita Income	$21,847	$24,432

10-Mile Market Ring Demographics (continued)

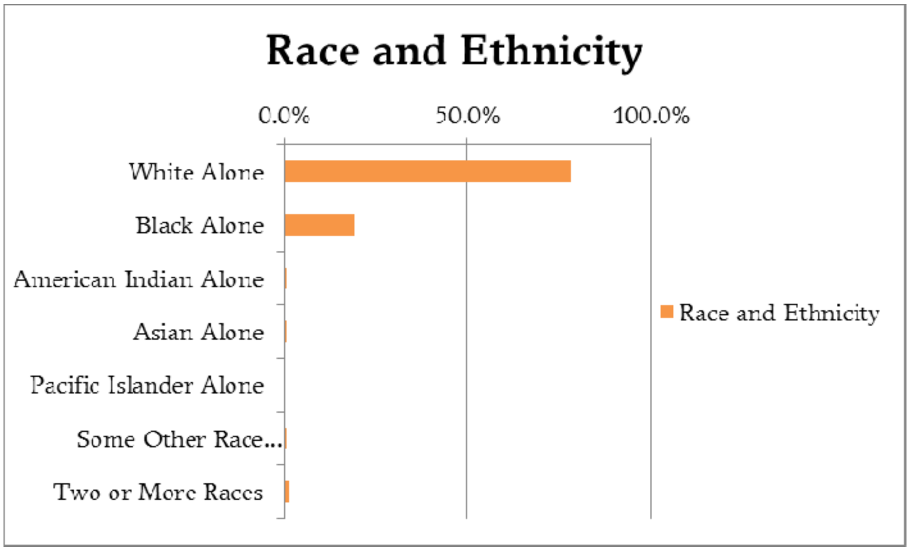
The table and chart below show the age demographics for the 10-mile market for the Lynchburg-Appomattox area. As reported previously, the 2012 median age is 43.0 for the market area with an anticipated slight aging to 44.2 years in 2017. This is also accompanied by a shift in the most populous age range from residents aged 45-54 to the aged 55-64.



	Census 2010		2012		2017	
Population by Age	**Number**	**Percent**	**Number**	**Percent**	**Number**	**Percent**
0 - 4	884	5.5%	897	5.4%	920	5.4%
5 - 9	986	6.1%	997	6.1%	1,021	5.9%
10 - 14	1,077	6.7%	1,078	6.5%	1,120	6.5%
15 - 19	1,015	6.3%	984	6.0%	967	5.6%
20 - 24	840	5.2%	872	5.3%	828	4.8%
25 - 34	1,763	10.9%	1,821	11.1%	1,886	11.0%
35 - 44	2,008	12.5%	1,985	12.0%	1,996	11.6%
45 - 54	2,558	15.9%	2,526	15.3%	2,403	14.0%
55 - 64	2,262	14.0%	2,411	14.6%	2,606	15.2%
65 - 74	1,592	9.9%	1,735	10.5%	2,155	12.5%
75 - 84	836	5.2%	851	5.2%	929	5.4%
85+	297	1.8%	318	1.9%	345	2.0%

The chart and tables provided below relate to the race and ethnicity of the population within the 10-mile market ring. This information clearly shows that the Lynchburg-Appomattox area is overwhelmingly white with less than one-fifth being African-American. These proportions are anticipated to stay largely the same in 2017 with slight increases in the number of non-black minorities represented in the market.

10-Mile Market Ring Demographics (continued)



	Census 2010		2012		2017	
Race and Ethnicity	**Number**	**Percent**	**Number**	**Percent**	**Number**	**Percent**
White Alone	12,608	78.2%	12,860	78.1%	13,366	77.8%
Black Alone	3,106	19.3%	3,184	19.3%	3,292	19.2%
American Indian Alone	38	0.2%	40	0.2%	46	0.3%
Asian Alone	35	0.2%	43	0.3%	60	0.3%
Pacific Islander Alone	4	0.0%	4	0.0%	4	0.0%
Some Other Race Alone	67	0.4%	73	0.4%	90	0.5%
Two or More Races	262	1.6%	271	1.6%	317	1.8%
Hispanic Origin (Any Race)	197	1.2%	213	1.3%	268	1.6%

10-Mile Market Ring Estimated Retail Demand

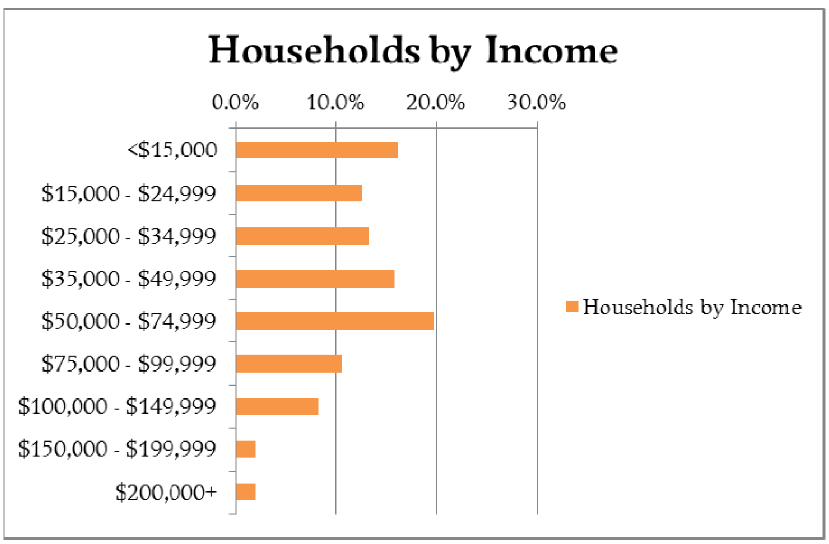
The table below shows the retail categories with a significant retail gap in the 10-mile market surrounding the Lynchburg-Appomattox area. The estimated retail demand is the excess demand not being satisfied by retail business sales within the 10-mile market area. The total estimated retail demand is $20.1 million. The categories with unabsorbed retail demand are:

- Other General Merchandise Stores
- Drinking Places – Alcoholic Beverages
- Special Food Services (catering)
- Beer, Wine, & Liquor Stores

10-Mile	Est. Retail Demand	
Other General Merchandise Stores	$	11,807,654
Drinking Places - Alcoholic Beverages	$	4,666,658
Special Food Services	$	2,231,283
Beer, Wine & Liquor Stores	$	1,392,943
TOTAL	***$***	***20,098,538***

25-Mile Market Ring Demographics

Summary	Census 2010	2012	2017
Population	209,310	213,077	220,916
Households	79,928	81,320	85,084
Families	51,569	51,879	54,274
Average Household Size	2.4	2.4	2.4
Owner Occupied Housing Units	53,422	52,377	54,995
Renter Occupied Housing Units	26,506	28,944	30,089
Median Age	37.1	37.5	38.4

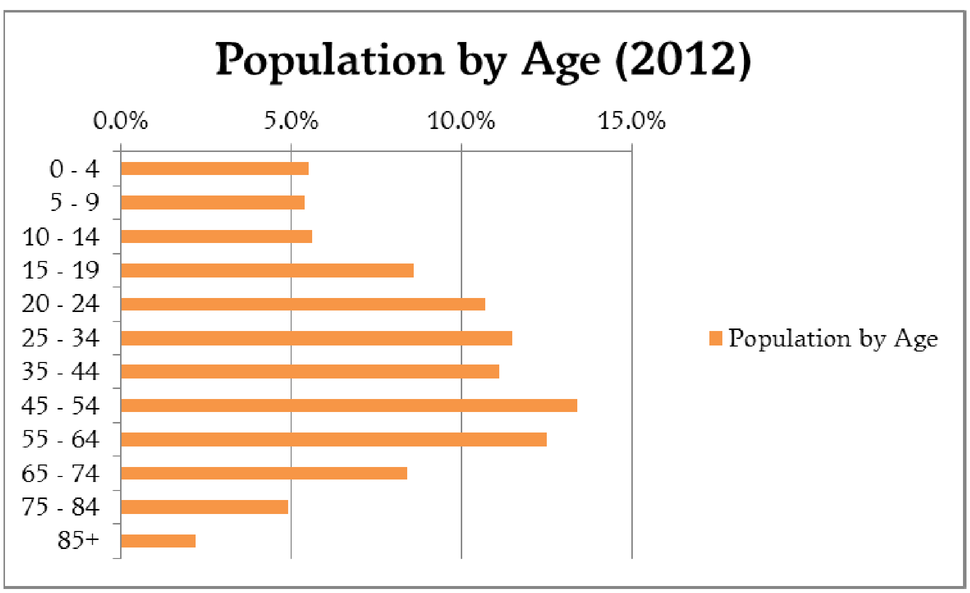


25-Mile Market Ring Demographics (continued)

	2012		2017	
Households by Income	**Number**	**Percent**	**Number**	**Percent**
<$15,000	13,078	16.1%	14,094	16.6%
$15,000 - $24,999	10,214	12.6%	8,569	10.1%
$25,000 - $34,999	10,850	13.3%	10,033	11.8%
$35,000 - $49,999	12,857	15.8%	11,991	14.1%
$50,000 - $74,999	15,982	19.7%	16,042	18.9%
$75,000 - $99,999	8,511	10.5%	12,327	14.5%
$100,000 - $149,999	6,777	8.3%	8,348	9.8%
$150,000 - $199,999	1,520	1.9%	2,024	2.4%
$200,000+	1,528	1.9%	1,655	1.9%

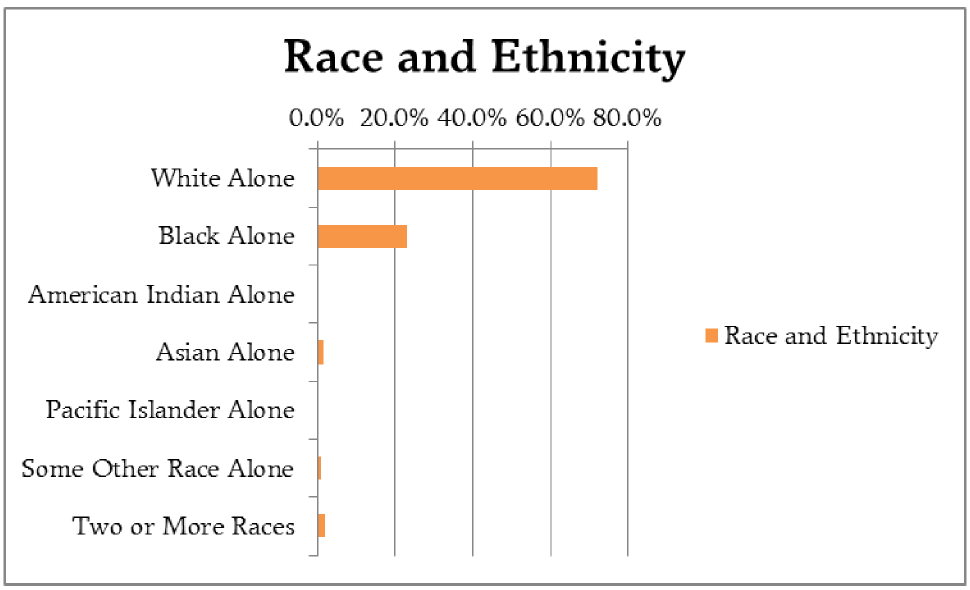
	2012	2017
Median Household Income	$41,346	$46,573
Average Household Income	$55,154	$60,842
Per Capita Income	$23,442	$25,817

The table and chart below show the age demographics for the 25-mile market for the Lynchburg-Appomattox area. As reported previously, the 2012 median age is 37.5 for the market area with an anticipated slight aging to 38.4 years in 2017. This is also accompanied by a shift in the most populous age range from residents aged 45-54 to those aged 55-64.



25-Mile Market Ring Demographics (continued)

	Census 2010		2012		2017	
Population by Age	**Number**	**Percent**	**Number**	**Percent**	**Number**	**Percent**
0 - 4	11,630	5.6%	11,769	5.5%	12,150	5.5%
5 - 9	11,448	5.5%	11,543	5.4%	11,846	5.4%
10 - 14	11,950	5.7%	11,927	5.6%	12,378	5.6%
15 - 19	18,769	9.0%	18,355	8.6%	18,175	8.2%
20 - 24	22,286	10.6%	22,850	10.7%	22,175	10.0%
25 - 34	23,767	11.4%	24,498	11.5%	25,465	11.5%
35 - 44	24,045	11.5%	23,757	11.1%	23,856	10.8%
45 - 54	28,896	13.8%	28,489	13.4%	27,198	12.3%
55 - 64	25,169	12.0%	26,718	12.5%	28,857	13.1%
65 - 74	16,580	7.9%	17,978	8.4%	22,306	10.1%
75 - 84	10,356	4.9%	10,495	4.9%	11,405	5.2%
85+	4,414	2.1%	4,698	2.2%	5,106	2.3%



	Census 2010		2012		2017	
Race and Ethnicity	**Number**	**Percent**	**Number**	**Percent**	**Number**	**Percent**
White Alone	151,136	72.2%	153,941	72.2%	159,030	72.0%
Black Alone	48,642	23.2%	48,891	22.9%	49,571	22.4%
American Indian Alone	780	0.4%	831	0.4%	952	0.4%
Asian Alone	2,900	1.4%	3,106	1.5%	3,740	1.7%
Pacific Islander Alone	82	0.0%	99	0.0%	144	0.1%
Some Other Race Alone	1,861	0.9%	2,082	1.0%	2,695	1.2%
Two or More Races	3,909	1.9%	4,127	1.9%	4,785	2.2%
Hispanic Origin (Any Race)	4,769	2.3%	5,378	2.5%	7,041	3.2%

The 25-mile market around the Lynchburg-Appomattox area is overwhelmingly white with less than a quarter being African-American. These proportions are anticipated to stay largely the same in 2017 with slight increases in the number of non-black minorities represented in the market.

25-Mile Market Ring Estimated Retail Demand

The table below shows the retail categories with a significant retail gap in the 25-mile market surrounding the Lynchburg-Appomattox area. The estimated retail demand is the excess demand not being satisfied by retail business sales within the 25-Mile market area. The total estimated retail demand is $52.4 million. The top five categories are:

- Food Services & Drinking Places
- Electronics & Appliance Stores
- Office Supplies, Stationery, & Gift Stores
- Beer, Wine, & Liquor Stores
- Building Material & Supplies Dealers

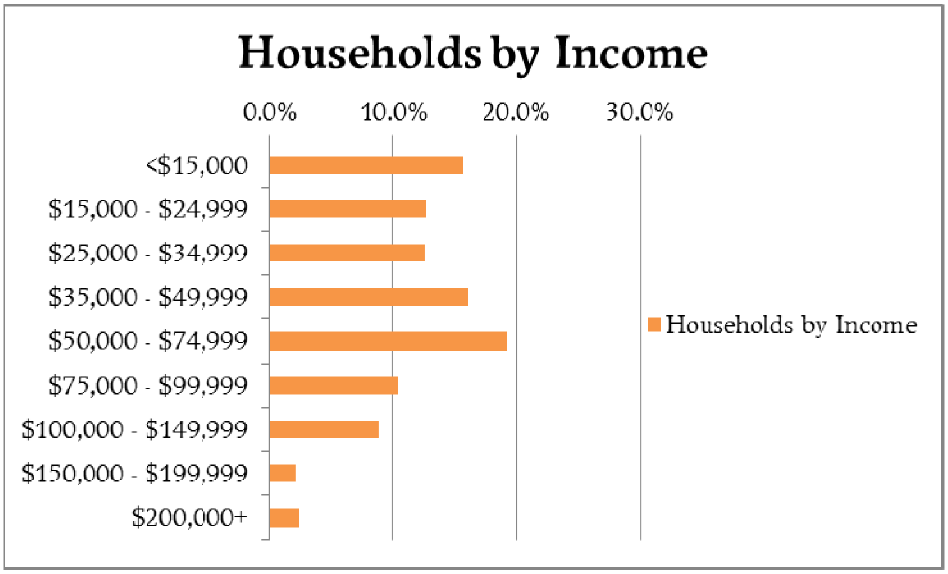
25-Mile	Est. Retail Demand	
Food Services & Drinking Places	$	32,544,231
Electronics & Appliance Stores	$	8,928,093
Office Supplies, Stationery & Gift Stores	$	3,463,018
Beer, Wine & Liquor Stores	$	2,675,978
Building Material & Supplies Dealers	$	2,474,842
Shoe Stores	$	1,498,466
Specialty Food Stores	$	808,231
TOTAL	*$*	*52,392,859*

50-Mile Market Ring Demographics

The tables and charts below provide a snapshot of the population, household, and income characteristics for the 50-mile market ring. By 2017 the population within this market ring is expected to be approximately 600,000 with an average household income of approximately $63,250.

Summary	Census 2010	2012	2017
Population	572,962	581,871	599,003
Households	224,514	227,525	236,018
Families	148,776	149,261	155,021
Average Household Size	2.4	2.4	2.4
Owner Occupied Housing Units	159,409	156,522	163,188
Renter Occupied Housing Units	65,105	71,002	72,830
Median Age	40.2	40.7	41.5

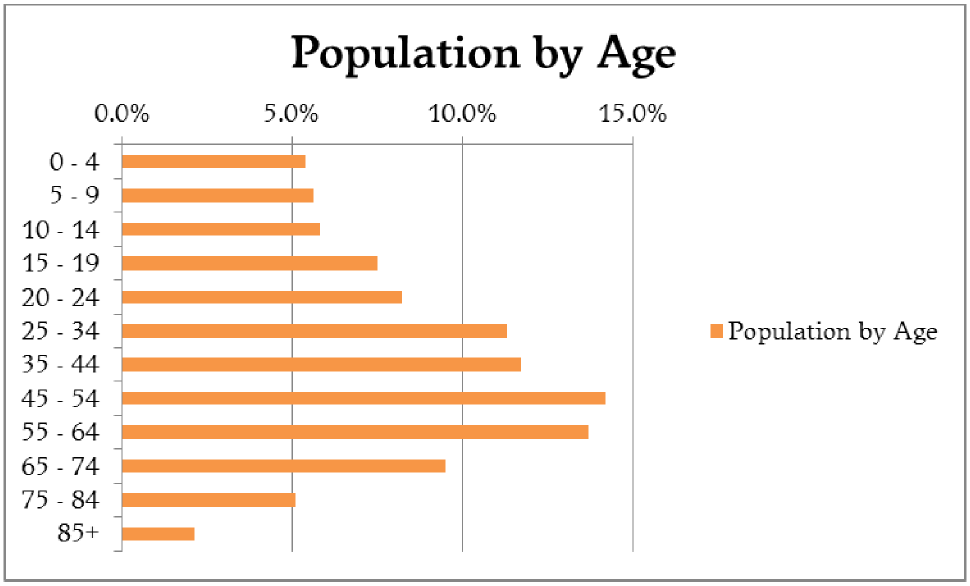
50-Mile Market Ring Demographics (continued)



	2012		2017	
Households by Income	**Number**	**Percent**	**Number**	**Percent**
<$15,000	35,616	15.7%	37,333	15.8%
$15,000 - $24,999	28,780	12.6%	23,686	10.0%
$25,000 - $34,999	28,542	12.5%	26,051	11.0%
$35,000 - $49,999	36,700	16.1%	34,171	14.5%
$50,000 - $74,999	43,725	19.2%	45,566	19.3%
$75,000 - $99,999	23,638	10.4%	32,867	13.9%
$100,000 - $149,999	20,338	8.9%	24,399	10.3%
$150,000 - $199,999	4,779	2.1%	6,218	2.6%
$200,000+	5,405	2.4%	5,723	2.4%
Median Household Income	$42,252		$48,134	
Average Household Income	$57,223		$63,250	
Per Capita Income	$23,869		$26,419	

The tables and charts below show the age demographics for the 50-mile market for the Lynchburg-Appomattox area. As reported previously, the 2012 median age is 40.7 for the market area with an anticipated slight aging to 41.5 years in 2017. This is also accompanied by a shift in the most populous age range from residents aged 45-54 to those aged 55-64.

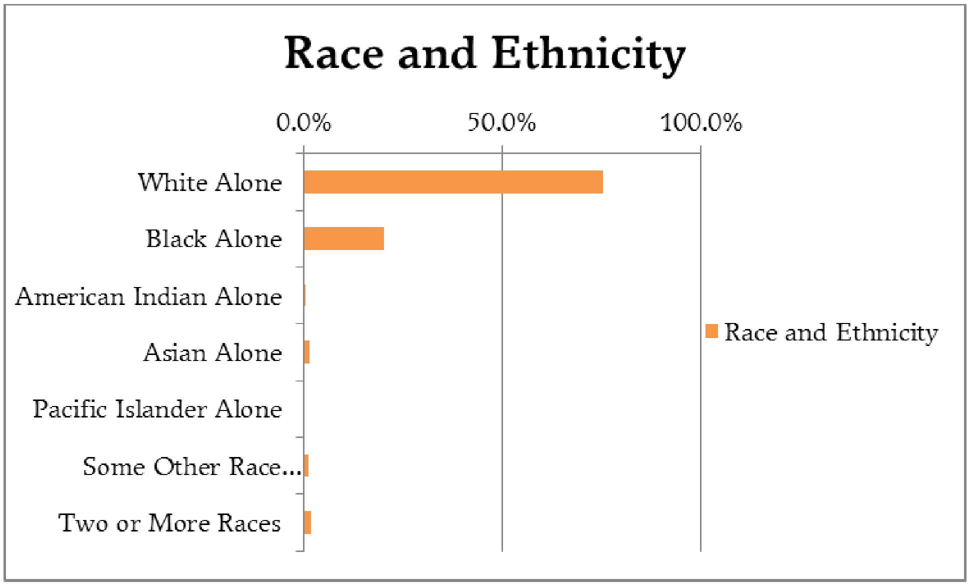
50-Mile Market Ring Demographics (continued)



Population by Age	Census 2010 Number	Census 2010 Percent	2012 Number	2012 Percent	2017 Number	2017 Percent
0 - 4	31,337	5.5%	31,586	5.4%	32,227	5.4%
5 - 9	32,193	5.6%	32,350	5.6%	32,846	5.5%
10 - 14	33,770	5.9%	33,604	5.8%	34,544	5.8%
15 - 19	44,870	7.8%	43,643	7.5%	42,797	7.1%
20 - 24	46,450	8.1%	47,562	8.2%	45,495	7.6%
25 - 34	63,751	11.1%	65,504	11.3%	67,474	11.3%
35 - 44	68,988	12.0%	67,985	11.7%	67,537	11.3%
45 - 54	84,282	14.7%	82,855	14.2%	78,317	13.1%
55 - 64	75,412	13.2%	79,783	13.7%	85,213	14.2%
65 - 74	51,134	8.9%	55,278	9.5%	67,773	11.3%
75 - 84	29,310	5.1%	29,568	5.1%	31,755	5.3%
85+	11,466	2.0%	12,154	2.1%	13,024	2.2%

The tables below provide data for race and ethnicity for 50-mile market around the Lynchburg-Appomattox area. As is indicated the 50-mile market ring is overwhelmingly white with one-fifth being African-American. These proportions are anticipated to stay largely the same in 2017 with slight increases in the number of non-black minorities represented in the market.

50-Mile Market Ring Demographics (continued)



	Census 2010		2012		2017	
Race and Ethnicity	**Number**	**Percent**	**Number**	**Percent**	**Number**	**Percent**
White Alone	432,399	75.5%	438,101	75.3%	447,812	74.8%
Black Alone	114,865	20.0%	116,282	20.0%	118,827	19.8%
American Indian Alone	1,875	0.3%	2,008	0.3%	2,322	0.4%
Asian Alone	7,593	1.3%	8,079	1.4%	9,484	1.6%
Pacific Islander Alone	181	0.0%	209	0.0%	282	0.0%
Some Other Race Alone	6,062	1.1%	6,650	1.1%	8,142	1.4%
Two or More Races	9,986	1.7%	10,541	1.8%	12,135	2.0%
Hispanic Origin (Any Race)	14,982	2.6%	16,538	2.8%	20,491	3.4%

50-Mile Market Ring Estimated Retail Demand

The table below shows the retail categories with a significant retail gap in the 50-mile market surrounding the Lynchburg-Appomattox area. The estimated retail demand is the excess demand not being satisfied by retail business sales within the 50-Mile market area. The total estimated retail demand is $246.8 million. The top five categories are:

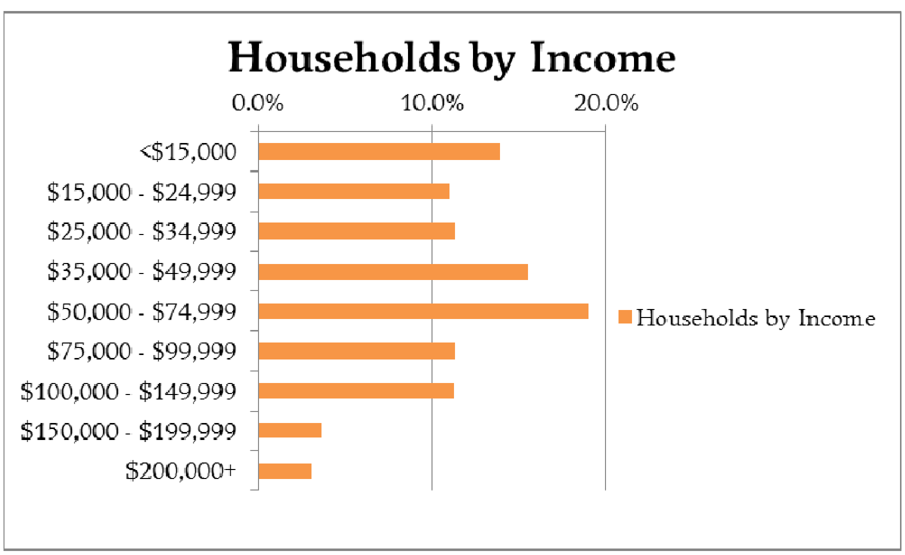
- Health and Personal Care Stores
- Clothing & Clothing Accessories Stores
- Office Supplies, Stationery, & Gift Stores
- Drinking Places – Alcoholic Beverages
- Home Furnishings Stores

50-Mile	Est. Retail Demand	
Health & Personal Care Stores	$	121,656,326
Clothing & Clothing Accessories Stores	$	52,466,778
Office Supplies, Stationery & Gift Stores	$	25,579,419
Drinking Places - Alcoholic Beverages	$	22,433,087
Home Furnishings Stores	$	10,149,877
Full-Service Restaurants	$	10,055,303
Sporting Goods/Hobby/Musical Instrument Stores	$	2,631,180
Specialty Food Stores	$	1,859,436
TOTAL	*$*	*246,831,406*

100-Mile Market Ring Demographics

The tables and charts below provide a snapshot of the population, household, and income characteristics for the 100-mile market ring. By 2017 the population within this market ring is expected to be approximately 4.5 million with an average household income of nearly $72,000. This market ring represents a drive time of approximately and hour and a half and encompasses some of the more populous areas of the State.

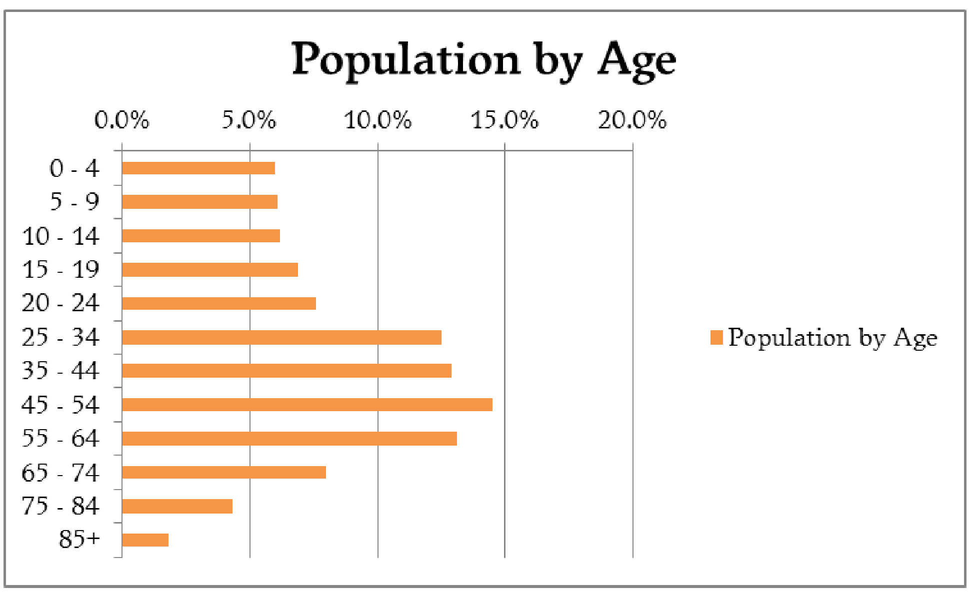
Summary	Census 2010	2012	2017
Population	4,206,124	4,282,816	4,462,764
Households	1,647,684	1,675,737	1,752,639
Families	1,084,885	1,091,846	1,142,852
Average Household Size	2.5	2.5	2.5
Owner Occupied Housing Units	1,116,742	1,101,337	1,157,870
Renter Occupied Housing Units	530,942	574,400	594,769
Median Age	38.5	38.8	39.3



100-Mile Market Ring Demographics (continued)

	2012		2017	
Households by Income	**Number**	**Percent**	**Number**	**Percent**
<$15,000	232,112	13.9%	240,244	13.7%
$15,000 - $24,999	184,839	11.0%	151,174	8.6%
$25,000 - $34,999	190,131	11.3%	165,207	9.4%
$35,000 - $49,999	259,165	15.5%	242,378	13.8%
$50,000 - $74,999	317,728	19.0%	340,221	19.4%
$75,000 - $99,999	188,678	11.3%	258,814	14.8%
$100,000 - $149,999	188,479	11.2%	220,944	12.6%
$150,000 - $199,999	61,995	3.7%	77,278	4.4%
$200,000+	52,594	3.1%	56,363	3.2%
Median Household Income	$47,835		$54,039	
Average Household Income	$64,644		$71,646	
Per Capita Income	$26,319		$29,155	

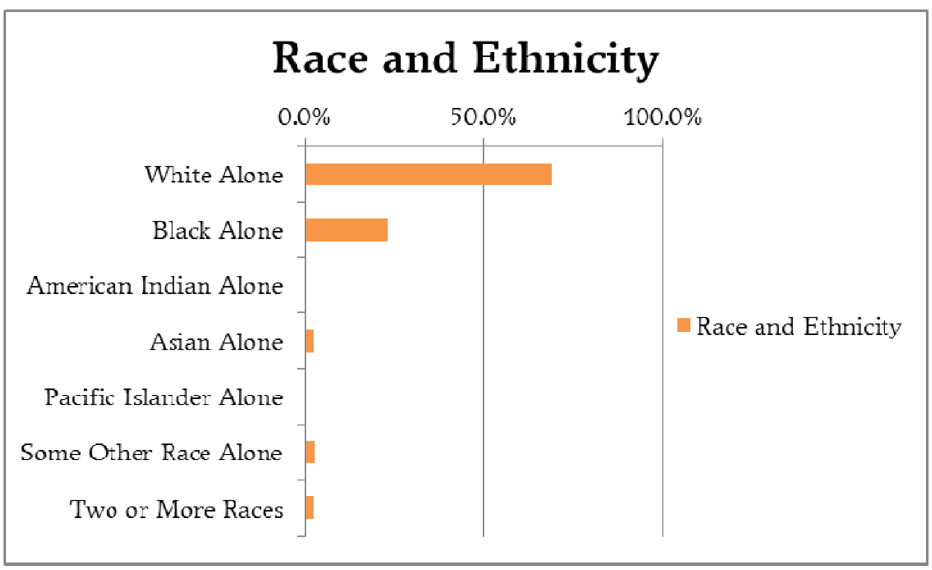
The table and chart below show the age demographics for the 100-mile market for the Lynchburg-Appomattox area. As reported previously, the 2012 median age is 38.8 for the market area with an anticipated slight aging to 39.3 years in 2017. This is also accompanied by a shift in the most populous age range from residents aged 45-54 to those aged 55-64.



100-Mile Market Ring Demographics (continued)

	Census 2010		2012		2017	
Population by Age	**Number**	**Percent**	**Number**	**Percent**	**Number**	**Percent**
0 - 4	251,891	6.0%	255,141	6.0%	265,206	5.9%
5 - 9	260,616	6.2%	263,194	6.1%	272,423	6.1%
10 - 14	264,995	6.3%	264,921	6.2%	277,557	6.2%
15 - 19	305,202	7.3%	297,230	6.9%	295,133	6.6%
20 - 24	314,536	7.5%	325,303	7.6%	314,325	7.0%
25 - 34	518,364	12.3%	535,823	12.5%	561,339	12.6%
35 - 44	557,865	13.3%	552,094	12.9%	559,541	12.5%
45 - 54	629,467	15.0%	620,636	14.5%	596,208	13.4%
55 - 64	528,756	12.6%	560,815	13.1%	608,044	13.6%
65 - 74	317,046	7.5%	343,600	8.0%	426,670	9.6%
75 - 84	183,218	4.4%	185,205	4.3%	200,823	4.5%
85+	74,168	1.8%	78,854	1.8%	85,495	1.9%

The chart and table below provide race and ethnicity data for the 100-mile market ring around the Lynchburg-Appomattox area. As is the case with each of the market rings previously discussed, this market area is overwhelmingly white with slightly less than a quarter being African-American. These proportions are anticipated to stay largely the same in 2017 with slight increases in the number of non-black minorities represented in the market.



100-Mile Market Ring Demographics (continued)

	Census 2010		2012		2017	
Race and Ethnicity	**Number**	**Percent**	**Number**	**Percent**	**Number**	**Percent**
White Alone	2,921,654	69.5%	2,962,802	69.2%	3,037,272	68.1%
Black Alone	970,607	23.1%	986,076	23.0%	1,027,160	23.0%
American Indian Alone	18,278	0.4%	19,199	0.4%	21,651	0.5%
Asian Alone	96,920	2.3%	102,413	2.4%	120,101	2.7%
Pacific Islander Alone	1,953	0.0%	2,120	0.0%	2,695	0.1%
Some Other Race Alone	109,679	2.6%	117,344	2.7%	143,750	3.2%
Two or More Races	87,033	2.1%	92,862	2.2%	110,135	2.5%
Hispanic Origin (Any Race)	226,081	5.4%	242,912	5.7%	298,744	6.7%

100-Mile Market Ring Estimated Retail Demand

The table below shows the retail categories with a significant retail gap in the 100-mile market surrounding the Lynchburg-Appomattox area. The estimated retail demand is the excess demand not being satisfied by retail business sales within the 100-Mile market area. The total estimated retail demand in the 100-mile market area is $1.6 billion. The top five categories are:

- Department Stores
- Clothing Stores
- Health and Personal Care Stores
- Limited-Service Eating Places (Quick-service or casual; e.g., Panera or Chipotle)
- Drinking Places – Alcoholic Beverages

100-Mile	**Est. Retail Demand**	
Department Stores Excluding Leased Depts.	$	451,338,737
Clothing Stores	$	247,589,057
Health & Personal Care Stores	$	184,587,537
Limited-Service Eating Places	$	139,794,749
Drinking Places - Alcoholic Beverages	$	138,173,164
Jewelry, Luggage & Leather Goods Stores	$	87,223,015
Electronics & Appliance Stores	$	69,635,183
Sporting Goods/Hobby/Musical Instrument Stores	$	69,261,621
Office Supplies, Stationery & Gift Stores	$	63,646,394
Shoe Stores	$	56,668,015
Home Furnishings Stores	$	35,234,836
Other General Merchandise Stores	$	25,267,223
Beer, Wine & Liquor Stores	$	21,004,815
Specialty Food Stores	$	14,914,597
Book, Periodical & Music Stores	$	10,254,552
Used Merchandise Stores	$	2,451,551
TOTAL	***$***	***1,617,045,046***

CONCLUSIONS

Tourism in the Lynchburg/Appomattox region is currently at a level that is in excess of 1.6 million visitors per year and as the tourism swells during the Sesquicentennial-year events may be very near 2 million. Recent survey data compiled by PGAV and others provides several insights into the basis for our impressions of the Appomattox environs that supports our feeling that, with perseverance, the Town and its environs can capitalize on trends. These trends support the notion that creating a promotional item that targets the retail and lodging development industries with the right information will eventually pay off. Some of the trends that support this notion:

- There is an increased value in visiting relaxing locations that are less crowded;
- People are more likely to stay closer to home in pursuit of vacation venues;
- They want a memorable experience;
- They want a pleasurable experience (this supports the visitor survey response trends noted on page one of this document);
- History-related tourism is a growth segment of the tourism industry; and
- Visitors to history-related areas and venues are some of the bigger spenders in terms when visiting an area.

The challenge for Appomattox is to get the attention of the lodging and retail entities. We think that if they can know and understand the relationships between the Town, the Lynchburg area, and the ease with which all of the historic and recreational facilities can be reached, the development goals and objective the Town is trying to achieve may be reached. The primary activity at this point should be **development of a marketing plan** to achieve the joint goals of lodging and destination retail development.

With these thoughts in mind there are several actions that the Town using the Region 2000 resources should pursue as components of the marketing plan effort.

- Identify the potential real estate development entities and nationally-recognized lodging entities and the key contacts within that would be the targets of the marketing effort. This should also include wealthy individuals, corporate heads, and other influential parties at the regional or State level who might have passion for leading the effort, be potential investors, or have influential contacts. A game plan for contacting each of these entities (who makes the contacts, by what method, what materials are provided initially, what follow-up data will be appropriate, etc.)

- Develop a marketing document and/or materials that can be part of a concerted effort to attract the lodging and retail components that can be the cornerstone of future development. This document/these materials should promote the visitor data, provide a linkage between the data and the likely success of the retail and lodging concepts the Town has in mind that will achieve developer interest, and do so in a manner that's an initial attention-getter. There is a wealth of information that PGAV has already compiled but it will be critical to create a concise package focused on attracting these users.

  In addition, experience has told us that this will probably need to include some eye-catching development concept drawings that cause these targeted entities to grasp the potential of this opportunity. These drawings should be oriented to a specific location/site but without concern for whether or not that would ultimate by the site or even if the development would look exactly as drawn. This effort is really about getting the attention and serious consideration of the targeted entities.

- Continue the pursuit of the contacts that have been initiated:

  - Pursue the Marriott contact with which the Town had been discussing the development of a unique lodging concept. This was an ideal concept for a unique facility that we believe fits the lodging target and has the potential for future expansion. There are good sites that could be utilized for such both types of development.

  - Taubman Prestige Outlets has shown interest in discussing the potential for retail development and we have begun a relationship with the Premium Outlets division of Simon Properties for a project in another locale and will continue to pursue that contact. As part of the market contacts discussed above, efforts should be made to pursue others. We will provide a list of other potential entities.

- Follow through with a concerted marketing effort based on the general points as outlined above with specific identification as to who will be responsible for the various aspects of the plan and a timeline for the various components.

Appomattox represents a situation that we believe has the ingredients to achieve its goals and objectives but it must overcome a variety of locational and demographic factors that on the surface don't fit the normal criteria for the types of development that it is wanting to attract. However, there are other instances around the US where similar circumstances existed and yet successful development of a like nature occurred. The cluster of nationally-recognized recreation and historic sites within short travel times (some measured in minutes) and the visitors generated by Liberty University and the Lynchburg area industries continue to convince us that the potential is there. It's a matter of promoting these assets to the entities you want to attract in the right way.

APPENDIX

SUPPORTING DATA FROM AUGUST 2013

PROJECT REPORT
SUPPORTING DATA FROM AUGUST 2013

The following is an initial report delivered to the Town of Appomattox and Region 2000 in August 2013 on the progress made regarding the analysis of tourism and visitor data. The data is organized in three sections: Summary, Ongoing Activities, and Appendix. The underlying purpose was to determine the extent to which destination retail, or in this context the so-called "outlet centers", (or retail supporting the visitors to the area and local residents) can be supported. In addition, we were also charged with determining if complimentary lodging with retreat or conference-type meeting facilities could be supported as a complimentary development component.

The Summary contains selected data that pertain to tourism attractions and related activity. The Ongoing Activities section lists work tasks, as described in the Scope of Services, that are currently in progress or have yet to be undertaken. The Appendix contains map exhibits and tables that support or illustrate the Summary findings.

SUMMARY

The Town of Appomattox (the "Community") is located within the Lynchburg Metropolitan Statistical Area (the "Lynchburg MSA"). The City of Lynchburg receives 1.2 million visitors per year[1] with 86,500 deplanements and 78,600 Amtrak passengers in 2012. Of the 1.2 million visitors, 19% reported making a trip to the Appomattox Courthouse National Historical Park (ACNHP). The Park is the primary driver of tourism in Appomattox. In 2012, the Park visitation estimate was 220,000±. According to conversation with Park staff, 72,000 visitors to the Park utilized the visitor center. This number has increased 6-8% every year since 2008.

To gauge the typical characteristics and expected performance of a new retail outlet in Appomattox, we considered five existing outlets within a 100-mile radius of the Community. A typical existing outlet for this area has the following characteristics:

- Generates sales of an average of $243.5 million per year
- Median Gross Leasable Area of 493,302 square feet
- Located along major roadway with Annualized Average Daily Traffic (AADT) of 53,000 to 154,000 vehicles
- Population of 1.5 million residents in 30-mile radius (2010 Census)
- Average Household Income in 30-mile radius: $87,370 (2012 estimate)

[1] www.discoverlynchburg.org

For comparison, Appomattox has the following characteristics:

- Domestic tourism expenditures in Appomattox were $9.44 million for 2011.[2]
- We estimate that $1.2 million of these tourism expenditures were for shopping, gifts, and souvenirs.[3]
- Data indicates surplus retail sales of $401.2 million in the area covering a 30-minute drive time around Lynchburg. Appomattox is located within this 30-minute drive time area.
- AADT of US 460 leading into Appomattox: 17,000 vehicles[4]
- Population of 30-mile radius around Appomattox: 253,091 (2010 Census)
- Average household income in 30-mile radius around Appomattox: $56,910 (2012 estimate)

CURRENT TOURISM AND VISITOR DATA

The Virginia Tourist

An overview of tourism activity across the Commonwealth of Virginia provides a background for understanding further details of travelers' activity. Tourism in Virginia had an economic impact of $20.4 billion in 2011, supported 207,000 jobs, and contributed $1.3 billion to state and local tax revenue[5]. On the following page, are key highlights of tourism statewide.[7]

- The primary purpose of all trips in Virginia is to visit friends and family (48%).
- The majority (55%) of travelers hail from the Commonwealth of Virginia, North Carolina, New York, or Maryland.
- Tourism in Virginia is very seasonal with thirty-three percent (33%) of travel happening in the summer months.
- Average travel party was 3.9 people. Forty-one percent (41%) of travel parties consisted of two people. Twenty-one percent (21%) had children under 18 years old.
- Travel parties spent an average of 3.4 nights in lodging in Virginia. Eighty-six percent (86%) of the lodging used was either a hotel/motel (44%) or private home (42%).
- Average travel spending was $414.50 with fifty-three percent (53%) of parties spending less than $250. After gasoline, the next largest travel expenditures, in descending order, were in eating and drinking establishments, groceries, and lodging.

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[2] Economic Impact of Domestic Travel on Virginia Counties, 2011 and 2010, VATC.

[3] Estimate is based on an adjusted percentage of 13% of total visitor expenditures of $9.44 million. Methodology and other spending estimates may be found on page 9.

[4] Old Courthouse Corridor Study, 2013

[5] State Tourism Plan, 2013

[7] Virginia Tourism Corporation (VATC)

The Central Virginia Tourist

Central Virginia, geographically the largest of the Commonwealth's tourism regions, is known for its historical, Civil War, and Civil Rights sites; natural beauty, boasting eight state parks; and culinary attractions including sixty-seven wineries, the second largest wine region in the state. Madison County lies to the north, Richmond to the east, Southampton County to the south at the North Carolina border, and Bedford to the west. The region has a population of 1.7 million and generated $3.4 billion in 2011 tourism expenditures[8]. Below, are profile highlights for tourists visiting the region.[10] Appomattox is located in the Central Virginia region on Route 460 between the cities of Lynchburg to the northwest and Richmond and Petersburg to the east.

- Primary purpose of fifty percent (50%) of domestic travel in Central Virginia is to visit family and friends.
- Sixty-six percent (66%) of travelers to Central Virginia come from within the Commonwealth of Virginia, Maryland, or North Carolina.
- Fifty-two percent (52%) of travelers to Central Virginia come from the following media market areas (in descending order):
    - Norfolk-Portsmouth-Newport News, VA
    - Washington, DC (Hagerstown)
    - Richmond-Petersburg, VA
    - Roanoke-Lynchburg, VA
    - Raleigh-Durham, NC
- After visiting family and friends, the next largest primary purposes of trips to Central Virginia were general business or personal pleasure.
- Travel to Central Virginia is seasonal much like the rest of the state with thirty-two percent (32%) of travel happening in the summer months.
- Forty percent (40%) of travel parties to Central Virginia consisted of two people.
- Fifty percent (50%) of travelers to Central Virginia were between 25 to 54 years of age.
- Nineteen percent (19%) of travel parties had children under 18 years old.
- Fifty-eight (58%) of travelers to Central Virginia spent 1-2 nights in lodging in the region. Forty-six percent (46%) of travel parties stayed in a hotel/motel; forty-two percent (42%) in a private home.

[8] Central Virginia Regional Section of Virginia State Tourism Plan, 2013

[10] Central Virginia Traveler Profile, Virginia Tourism Corporation
http://www.vatc.org/uploadedFiles/Research/CentralVATripProfilefy2011VAmodule.pdf

The Historic/Civil War Tourist

The profile of the historic and Civil War tourist is particularly relevant to an assessment of the potential for retail development in Appomattox due to the importance of the ACNHP in Civil War history and the recent addition of the Museum of the Confederacy (MOC). Below are highlights particular to the historic/Civil War traveler in Virginia.[12]

- *Seasonality* - Historic/Civil War tourists are the most seasonal with thirty-five percent (35%) of their trips taking place during the summer months.
- *They Travel in Pairs*- Forty-six percent (46%) travel as a pair. Forty-four percent (44%) are aged 45 years or older.
- *They Visit Longer*- Historic/Civil War tourists tend to stay longer with twenty-nine percent (29%) spending five or more nights in lodging in Virginia. They also tend to stay in a hotel/motel (46%).
- *They Spend More*- After business travelers, the average historic/Civil War tourist spends $100 more than other tourists do.

Lynchburg

Lynchburg is located a half-hour drive northwest from Appomattox and, with 1.2 million visitors per year and the closest airport and Amtrak station to Appomattox, it has a significant influence on the Town's tourism future.

Below are important highlights regarding tourism activity in the Lynchburg area:[13]

- $155.76 million in domestic tourism expenditures[14]
- The top three reasons for visiting were:
  - College-related trips – 37.2%
  - Business trips – 25.4%
  - Visiting local or nearby attractions – 23.7%
- Average group size: 3.09 people
- Average number of visits: 2.12
- Average number of nights: 2.38
- Average expenditures of $146 per person/ per day

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[12] Virginia Tourism Corporation

[13] Discover Lynchburg Visitor Profile Study, Q4 2012

[14] Economic Impact of Domestic Travel on Virginia Counties, 2011 and 2010, VA Tourism Corp.

- Each visitor "group" generates $1,073[15]
- Total lifetime revenue per visitor group: $2,274[16]
- 19% of Lynchburg visitors also reported visiting the ACNHP

The table below illustrates the retail gap in a 30-minute drive time area around Lynchburg. A negative number indicates that retail spending exceeds the amount the resident population could support, which means that the area is a draw for outside consumers. The 30-minute drive-time area has a total surplus of $401.2 million in sales indicating success in attracting retail sales from outside the area. This may present an opportunity for Appomattox to capture regional shoppers or tourists who appear to be oriented to this area.

Retail Gap for 30-Mile Drive Time Around Lynchburg

	NAICS	*Retail Demand*	*Retail Supply (Sales)*	*Retail Gap*
Furniture & Home Furnishings	442	$36,216,983	$58,205,302	($21,988,319)
Electronics & Appliance	4431	$36,625,133	$36,507,686	$117,447
Bldg Materials, Garden Equip. & Supply	444	$55,434,280	$66,314,849	($10,880,569)
Food & Beverage	445	$263,929,377	$366,277,171	($102,347,794)
Health & Personal Care	446,4461	$129,254,968	$161,687,202	($32,432,234)
Clothing & Clothing Accessories	448	$99,919,891	$132,858,671	($32,938,779)
Sporting Goods, Hobby, Book & Music	451	$43,072,621	$80,156,901	($37,084,280)
General Merchandise	452	$304,831,746	$464,954,310	($160,122,564)
Miscellaneous Store Retailers	453	$43,177,211	$56,136,777	($12,959,567)
Food Services & Drinking Places	722	$167,903,177	$158,466,411	$9,436,766
TOTAL		$1,180,365,387	$1,581,565,280	**-$401,199,892**

[15] Based on an average group size of 3.09, an average length of stay of 2.38 nights, and an average spending of $145.91 per person per day.

[16] Based on an average number of visits: 2.12.

Appomattox

According to previous reports, the ACNHP has an estimated visitation of 200,000±.[18] However, due to certain factors and after conversation with park staff[19], we consider the possibility that this number may be too high and that a more accurate visitation number exists between a minimum of 72,000 for FY2012[20] and the higher, more publicized 200,000±. In 2010, the average number of visitors to the visitor center was 60,000.[22] According to park staff, this visitation number has increased 6-8% every year since 2008, this may be due, in large part, to the increased interest in Civil War history driven by events and activities commemorating the Sesquicentennial.

- Estimated 6,120 to 13,320 overnight stays per year in the immediate Appomattox area[23]
- $9.44 million in tourism expenditures[24]

Museum of the Confederacy[25]

- 45.5% of ACNHP visitors planned on visiting the MOC
- 80% of visitors did not know about MOC prior to their visit
- 10.5% of visitors were planning to visit the MOC before they left home
- 59.5% of visitors were staying 2 hours or less in Appomattox versus 7% staying 5 hours to one day
- 37.5% were aged 46 years and older; 73% accompanied by spouse/partner

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[18] Economic Feasibility Analysis, Kendrick Brunson; National Park Service Visitor Use Statistics https://irma.nps.gov/Stats/SSRSReports/Park Specific Reports/Annual Park Visitation (All Years)?Park=APCO

[19] Based on comments from Park staff regarding malfunctioning readers recording unusually high numbers and phone conversation with staff who expressed concerns of overcounting. https://irma.nps.gov/Stats/SSRSReports/Park Specific Reports/Visitation Comments by Park Staff?Park=APCO

[20] Estimate based on the count of visitors who utilize the visitor center.

[22] Appomattox Court House National Historical Park Long-Range Interpretive Plan http://www.nps.gov/hfc/pdf/ip/APCO_LRIP.pdf

[23] Based on reported overnight stays in Appomattox area, MOC Admissions Marketing Survey

[24] Virginia Tourism Corporation, Economic Impact of Domestic Travel on Virginia Counties, 2011 and 2010

[25] Museum of Confederacy Admissions Marketing Survey, December 2012

- Purpose of Trip
    - 42% visit ACNHP
    - 22.5% visiting family/friends
    - 10.5% on driving trip
    - 6.5% on business trips
    - 5% attending special event
- Overnight Stays
    - 77% stay overnight away from home prior to MOC visit
    - 65.5% stay overnight away from home after MOC visit
  - Lodging the ***night before*** visit:
      - ***7.5% Appomattox immediate area***
      - 30.5% Lynchburg area
  - Lodging the ***night of*** visit:
      - 19% Lynchburg
      - 9% Northern VA/DC
      - ***6% Appomattox area***

Appomattox Courthouse National Historical Park[26]

- ***200,000+ reported visitation for FY2012***
- 72,000 visitors utilized the visitor center
- 6-8% increase in attendance per year (may be attributable to ramp-up to Sesquicentennial)
- Out-of-state visitor traffic heavier during summer months
- Fall/Winter visitors are mostly married couples aged 55 years and older

[26] Telephone conversation with ACNHP staff.

Visitor Spending in Appomattox

Estimates of Visitor Spending in Appomattox by Category

	Percent		
Eating/Drinking Establishments	24%	$	2,256,000
Gasoline	23%	$	2,144,000
Lodging	13%	$	1,237,000
Shopping/Gifts/Souvenirs	13%	$	1,237,000
Entertainment/Admissions (excluding gaming)	12%	$	1,123,000
Groceries	11%	$	1,010,000
Amenities	2%	$	216,000
Other	2%	$	216,000
TOTAL	100%	$	9,439,000

The above estimates were calculated using the visitor expenditure percentages by category for historic and Civil War tourists from the traveler profiles assembled by the Virginia Tourism Corporation. The percentages were applied to Appomattox's $9.44 million in total 2011 domestic tourism expenditures. For categories such as parking fees, casinos, etc. that we initially understand do not apply to Appomattox, we redistributed that spending to the remaining "Other" categories proportionately. These estimates represent an initial 'best guess' and may be refined with access to more detailed sales or tax reporting data.

Transportation Network

Exhibit-1, in the Appendix, illustrates the highway system, major airport locations, including 2012 annual deplanements (minus connections), and Amtrak stations in a 100-mile radius of Appomattox.

Total Deplanements by Airport (100-mile radius, 2012)

Airport	Deplanements	Percent
Richmond, VA - Richmond International Airport	1,577,567	51%
Greensboro, NC - Piedmont Triad International Airport	887,314	29%
Roanoke, VA - Roanoke Regional Airport	314,743	10%
Charlottesville, VA - Albemarle Airport	229,618	7%
Lynchburg, VA - Lynchburg Regional Airport	78,636	3%
Total	3,087,878	100%

The airports in Roanoke, Lynchburg, and Richmond comprise 1.9 million deplanements. All three are located in proximity to the 460/307/360 east/west corridor connecting Roanoke to Richmond. Primary vehicular traffic through Appomattox moves along highway 460 with an AADT of 17,000[27]. Amtrak stations within the 100-mile radius reported a ridership of 1.4 million[28] passengers.

Historical Tourism

Exhibit-2, in the Appendix, illustrates the locations of major historical, Civil War (Lee's Retreat sites[29], exclusively), and historical military tourism attractions within a 100-mile radius of Appomattox. A list of these attractions is included in Table-1 in the Appendix.

Educational Tourism

Exhibit-3, in the Appendix, illustrates the locations of universities, including total number of enrolled students and faculty, and museums within a 100-mile radius of Appomattox. A list of these attractions is included in Table-2 in the Appendix.

Recreational Tourism

Exhibit-4, in the Appendix, illustrates the locations of the following attractions within a 100-mile radius of Appomattox:

- Amusement Parks
- Zoos and Animal Parks
- Wineries (Central Virginia only)
- Festivals
- Casinos
- Resorts
- Racing Venues
- Sports Stadiums and Arenas

A list of these attractions is included in Table-3 in the Appendix.

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27 Appomattox Old Courthouse Road Corridor Study

28 www.greatamericanstations.com, FY 2012

29 http://www.civilwartraveler.com/EAST/VA/va-southside/retreat.html

Nature Tourism

Exhibit-5, in the Appendix, illustrates the locations of the following nature attractions within a 100-mile radius of Appomattox:

- State Parks
- Significant Bodies of Water
- National Park Service
- National Forest
- Caverns

A list of the attractions is included in Table-4 in the Appendix.

Outlet/Destination Shopping Centers

Today's outlet center industry, with $24.3 billion in sales, is seeing explosive growth. Retailers in outlet centers can offer their merchandise to customers at a 30-40% discount on average. This makes the centers highly attractive to tourists, die-hard shopping fans, and local residents. Eight new US outlet centers opened in 2012, totaling 4.1 million square feet in gross leasable area ("GLA"). Only two centers opened the year before. There are thirteen US projects scheduled to open in 2013 totaling 4.8 million square feet.

Below, are a few notes on the direction the outlet industry is heading based on the location and demographics of existing and newly opened centers, centers in predevelopment, and statements made in annual reports of the two major developers in the industry: Simon Property Group and Tanger Factory Outlet Centers. Together they own, or have a controlling interest in, 63% of all US outlet centers.

Industry-wide

- Average size of existing US Outlet Center GLA: 383,066 square feet
- Average size of centers' GLA opened in 2011-2012: 405,163 square feet

2012 Largest Outlet Center Developer Portfolios (Top Three)

1. Simon Property Group: 70 centers, 26,473,460 GLA
2. Tanger Factory Outlet Centers: 39 centers (including a joint venture with Simon), 12,412,391 GLA
3. Mills Corp./Simon Property Group: 8 centers, 11,996,000

Together, these portfolios represent 71% of the total GLA of US outlet centers. There are 185 US outlet centers, including two in Puerto Rico.[30]

Existing Outlets Surrounding Appomattox

A survey of retail outlets within a 100-mile radius of Appomattox may be helpful in constructing the typical performance expected of any new outlet center in the area. Below, is a table of five outlets with their size and market demographics.

EXISTING OUTLETS *(100+ mile radius)*

Outlet Mall	Location	GLA	AADT	Avg Sales PSF [1]	Population[2]	Avg HH Income[3]	Owner
Williamsburg Premium Outlets	Williamsburg, VA	521,604	76,000	$554.00	593,552	$73,868	Premium Outlets/SPG
Leesburg Corner Premium Outlets	Leesburg, VA	465,000	53,000	$554.00	3,079,555	$121,830	Simon Property Group
Potomac Mills	Prince William, VA	1,700,000	154,000	$554.00	3,898,923	$110,274	Simon Property Group
Proposed Norfolk Outlet	Norfolk, VA	*n/a*	82,000	n/a	1,495,673	$67,255	Simon Property Group
Tanger Outlets - Mebane	Mebane, NC	319,000	83,000	$375.00	907,773	$63,624	Tanger
Average		*751,401*	*89,600*	*$509.25*	*1,995,095*	*$87,370*	
Median		*493,302*	*82,000*	*$554.00*	*1,495,673*	*$73,868*	
Average US Outlet [1]	-	*383,066*	-	*$357.00*	-	-	-
Appomattox, VA	-	*n/a*	*17,000* [4]	*n/a*	*253,091*	$56,910	-

[1] *2012 State of the Outlet Industry, Value Retail News*
[2] *30 mile radius, Census 2010*
[3] *30 mile radius, 2012 estimate*
[4] *Old Courthouse Road Corridor Study, 2013*

Using the information above and an estimated occupancy rate of 97%[32] on the median gross leasable area (GLA) of 493,302 and the average sales per square foot of $509, we find that a typical outlet in the 100+-mile radius generates $243,558,000 in retail sales per year.

[30] 2012 State of the Outlet Industry, Value Retail News

[32] Tanger 2012 Annual Report and Simon Property Group August 2013 Quarterly Report

Tanger Outlets

The average size of Tanger outlets opened in 2012 was 342,500 square feet. The table below lists the two domestic outlets with key market information:

Tanger Newly Developed Centers

Open Date	Center	Location	Square Feet	AADT	Population[1]	Avg. HH Income[2]
Oct-12	Tanger Outlets Texas City	Houston, TX	353,000	60,000	1,632,968	$ 64,253
Nov-12	Tanger Outlets Westgate	West Phoenix, AZ	332,000	143,000	718,771	$ 84,436
Average			*342,500*	*101,500*	*1,175,870*	*$ 74,345*

[1] *30 mile radius, 2010 Census*
[2] *30 mile radius, 2012 estimate*

Tanger New Center Development Guidelines[33]:

- ***Population***: 1 million people within 30-40 mile radius
- ***Income***: Average household income of at least $65,000 per year
- ***Visibility***: Frontage on a major interstate or roadway
- ***Traffic***: Location along roadway with traffic count of at least 55,000 cars per day
- ***Tourism***: Tourist, vacation, resort market receiving at least 5 million visitors annually
- ***Size***: Sites large enough to support 90 stores totaling at least 350,000 square feet

Tanger Predevelopment Sites as of March 2013*

Location	State	Square Feet	AADT	Population[A]	Avg. HH Income[B]
Scottsdale	AZ	-	180,000	3,702,722	$ 68,536
Foxwoods	CT	312,000	26,000	718,771	$ 84,436
National Harbor[1]	MD	340,000	151,000	4,849,172	$ 108,809
Charlotte[2]	NC	350,000	86,000	1,813,837	$ 70,391
Columbus[2]	OH	350,000	70,000	1,678,180	$ 67,758
Average		*338,000*	*102,600*	*2,552,536*	*$ 79,986*
Median		*345,000*	*86,000*	*1,813,837*	*$ 70,391*

**Tanger Outlets Annual Report 2012*
[1] *Under construction; delivery November 2013*
[2] *Tanger & Simon Property Group joint venture*
[A] *30 mile radius, 2010 Census*
[B] *30 mile radius, 2012 estimate*

[33] 2012 Tanger Annual Report

Simon Premium Outlets

Simon opened two Premium Outlet centers in 2012:

1. Tanger Outlets Westgate in Houston, Texas, a joint venture with Tanger, listed previously in the Tanger Outlets section of the report, and
2. Merrimack Premium Outlets, in Merrimack, New Hampshire, wholly owned by Simon. Merrimack Premium Outlets serves the greater Boston and Nashua markets and is 409,000 square feet, 98% occupied and generating sales of $450 per square foot.

The table below lists the two newly developed centers by Simon. Phoenix Premium Outlets opened in April of 2013 and St. Louis Premium Outlets is scheduled to open later this month.

Simon Newly Developed Centers*

Open Date	Center	Square Feet	AADT	Population[1]	Avg. HH Income[2]
Apr-13	Phoenix Premium Outlets	360,000	96,000	3,450,618	$ 66,370
Aug-13	St. Louis Premium Outlets	350,000	86,000	2,082,863	$ 68,550

**domestic only*
[1] *30 mile radius, 2010 Census*
[2] *30 mile radius, 2012 estimate*

The table below lists household income and population information for a 30-mile radius around each of the existing Premium Outlets and for Premium Outlets opened from 2005 to 2013.

	All Premium Outlets*	Premium Outlets Opened 2005-2013*
2012 Median Household Income	$55,089	$52,841
2012 Average Household Income	$74,999	$69,817
2010 Median Population	1,383,792	1,607,678
2010 Average Population	1,717,668	2,482,095

	Minimum	Maximum	Minimum	Maximum
2012 Median Household Income	$28,769	$101,013	$28,769	$66,601
2012 Average Household Income	$42,926	$124,756	$42,926	$86,545
2010 Total Population	116,700	6,492,272	149,943	6,492,272

**30-mile radius*

	Premium Outlets Opened 2005-2013			
	GLA	Stores	AADT	Year Opened
Chandler, Arizona	360,000	90	90,000	2013
Merrimack, New Hampshire	410,000	100	54,000	2012
Monroe, Ohio	400,000	100	96,000	2009
Tinton Falls, New Jersey	435,000	120	80,000	2008
Cypress, Texas	427,000	120	81,000	2008
Limerick, Pennsylvania	425,000	120	52,000	2007
Mercedes, Texas	604,000	140	58,000	2006
Round Rock, Texas	430,000	125	83,000	2006
Tulalip, Washington*	508,000	125	101,000	2005

**105,000 sf expansion in 2013*

Based on Premium Outlets opened in 2005 through 2013, market demographics for existing outlet centers (within a 30-mile radius) are summarized below:

- ***Population***: Median population of 1.6 million residents
- ***Income***: Median household income of $52,000 per year
- ***Traffic***: Location along roadway with traffic count of at least 50,000 cars per day
- ***Tourism***: Tourist, vacation, resort markets received 6 million to 81 million visitors per year
- ***Size***: Sites large enough to support at least 90 stores totaling at least 350,000 square feet

APPENDIX

MAP/EXHIBITS AND TABLES FROM AUGUST 2013

Table 1 – Historical Tourism

Historical Tourism - Under 50 Miles		
Name	**Type of Attraction**	**Annual Visitors**
Spring Hill Cemetery	Civil War	
Old City Cemetery and Pest House	Civil War	
Fort McCausland	Civil War	
Fort Early	Civil War	
Quaker Meeting House	Civil War	
Sandusky	Civil War	
Museum of the Confederacy-Appomattox	Civil War	

Historical Tourism - 50-100 Miles		
Name	**Type of Attraction**	**Annual Visitors**
Petersburg National Battlefield Park	Civil War	
Radford Army Ammunition Plant	Civil War	
Richmond National Battlefield Park	Civil War	
Civil War Visitor Center At Tredegar Iron Works	Civil War	
Gaines Mill Battlefield-Watt House	Civil War	
Beaverdam Creek Battlefield	Civil War	
Chancellorsville Battlefield	Civil War	
Cold Harbor Battlefield	Civil War	
Grant's Headquarters at City Point	Civil War	
North Anna Battlefield	Civil War	
Droop Mountain Battlefield State Park	Civil War	
Monticello	Historical	
Hill Ridge Farms	Historical	

Table 2 – Educational Tourism

Educational Tourism - Under 50 Miles				
Name	**Type of Attraction**	**Annual Visitors**	**Student Enrollment**	**Faculty**
Legacy Museum of African American History	Museum			
Mair Museum of Art	Museum			
Museum of Military Memorabilia	Museum			
Liberty University	University		12,600	2,500
Virginia Military University	University		1,605	135

Educational Tourism - 50-100 Miles				
Name	**Type of Attraction**	**Annual Visitors**	**Student Enrollment**	**Faculty**
A Museum to Honor our Vietnam Vets	Museum			
American Armored Foundation-Tank Museum	Museum			
Arrington Engines - Facility Tour	Museum			
Car and Carriage Caravan Museum	Museum			
Caroline Museum & Cultural Center	Museum			
Children's Museum of Richmond	Museum			
Chimborazo Medical Museum	Museum			
D. Ralph Hostetter Museum of Natural History	Museum			
Danville Science Center	Museum			
The James Madison Museum	Museum			
Keystone Tractorworks Museum	Museum			
Museum and Whitehouse of the Confederacy	Museum			
Science Museum of Virginia	Museum			
Taubman Museum of Art	Museum			
US Army QuarterMaster Museum	Museum			
Virginia Aviation Museum	Museum			
Virginia Historical Society/Museum	Museum			
Virginia Holocaust Museum	Museum			
Virginia Museum of Fine Arts	Museum			
Virginia Museum of Natural History	Museum			
Virginia Museum of Civil War	Museum			
Woodrow Wilson Presidential Library and Museum	Museum			
Carnegie Hall	Museum			
Museum of Life and Science	Museum			
Museum of Life and Science	Museum			
Black History Museum & Cultural Center of Virginia	Museum			
Duke University	University		14,591	3,262
NC Central University	University		8,359	1,602
Elon University	University		6,029	385
Radford University	University		9,573	503
James Madison University	University		19,927	1,274
University of Virginia	University		21,095	7,979
University of Richmond	University		4,361	320
Virginia Union University	University		1,678	120
Virginia State University	University		5,890	370
Virginia Tech	University		28,836	1,368

Table 3 – Recreational Tourism

Recreational Tourism - Under 50 Miles		
Name	**Type of Attraction**	**Annual Visitors**
Benard's Landing	Resort	
Halesford Harbour	Resort	
Mariners Landing Resort	Resort	
The Berry Hill Resort & Conference Center	Resort	
Wintergreen Resort	Resort	
Smith Mountain Lake Wine Festival	Festival	
Natural Bridge Zoo	Zoo	
Virginia Safari Park	Animal Park	

Recreational Tourism - 50-100 Miles		
Name	**Type of Attraction**	**Annual Visitors**
Arthur Ashe Jr Athletic Facility	Sports Stadium	
The Diamond	Sports Stadium	
Durham Bulls Athletic Park	Sports Stadium	
Carolina Dynamo	Sports Stadium	
Southside Speedway	Raceway	
Richmond International Raceway	Raceway	
VIRginia International Raceway	Raceway	
Ace Speedway	Raceway	
Gaston Pointe Properties	Resort	
Keswick Hall	Resort	
Lake Gaston Resort	Resort	
Massanutten Resort	Resort	
Mountain Lake Conservancy & Hotel	Resort	
Primland Resort	Resort	
Shenandoah Crossing Resort	Resort	
Shenvalle Golf Resort	Resort	
The Boars Head	Resort	
The Homestead	Resort	
Greenbriar	Resort	
Snowshoe Mountain	Resort	
Washington Duke Inn & Golf Club	Resort	
Snowshoe Mountain Resort	Resort	
Greenbier's Casino Club	Casino	
Infinity Acres Alpaca Farm & Petting Zoo	Animal Park	
Luray Zoo and Reptile Center	Zoo	
Metro Richmond Zoo	Zoo	
Mill Mountain Zoo	Zoo	
Stonehaus Farms - Martinsville	Animal Park	
Kings Dominion	Amusement Park	
Massanutten Waterpark	Amusement Park	
Splash Valley Water Park	Amusement Park	

Table 4 – Nature Tourism

Nature Tourism - Under 50 Miles		
Name	**Type of Attraction**	**Annual Visitors**
George Washington National Forest	National Forest	
Jefferson National Forest	National Forest	
Appomattox Court House National Historical Park	National Park	
James River Face Wilderness	National Forest	
Priest Wilderness	National Forest	
Saint Mary's Wilderness	National Forest	
Three Ridges Wilderness	National Forest	
Thunder Ridge Wilderness	National Forest	
Leesville Lake	Lake	
Elkhorn Lake	Lake	
Banister Lake	Lake	
Bear Creek Lake State Park	State Park	
Holliday Lake State Park	State Park	
James River State Park	State Park	
Sailor's Creek Battlefield Historic State Park	State Park	
Smith Mountain Lake State Park	State Park	
Staunton River Battlefield State Park	State Park	
Twin Lakes State Park	State Park	
Natural Bridge Caverns	Cavern	

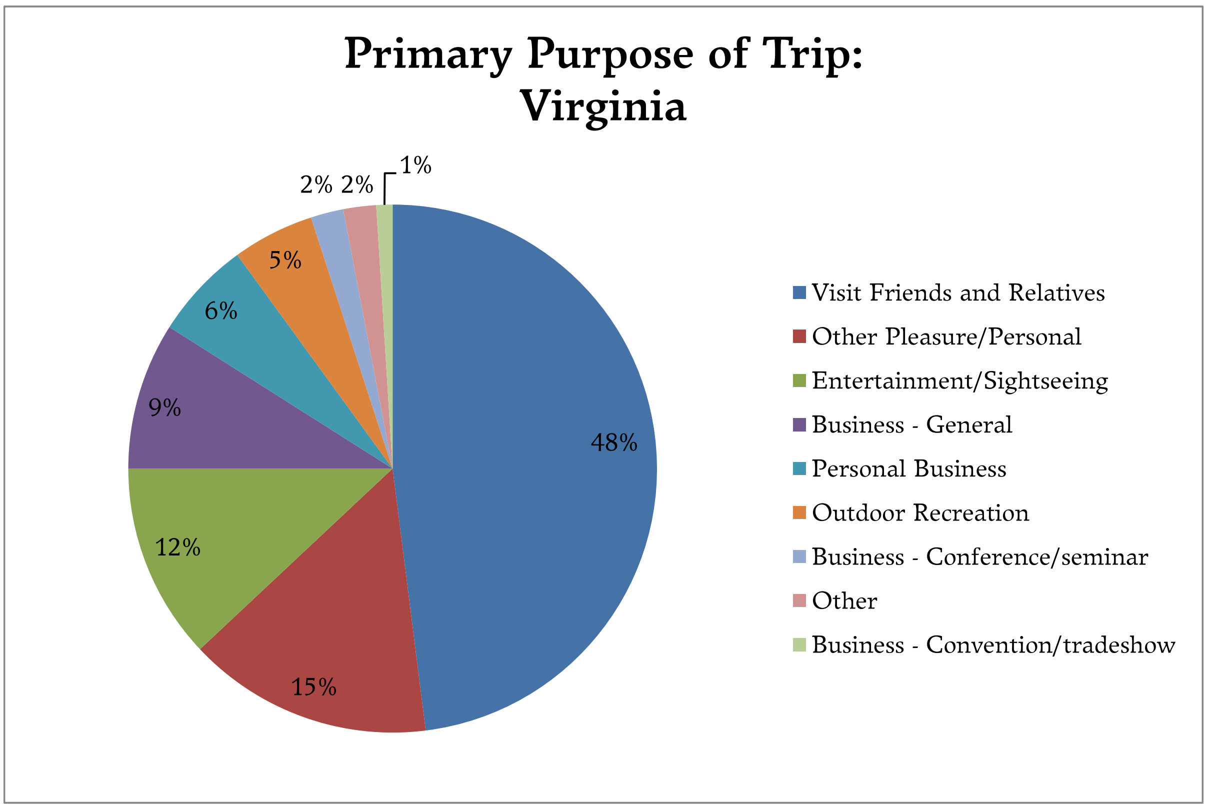
Nature Tourism - 50-100 Miles		
Name	**Type of Attraction**	**Annual Visitors**
Lake of the Woods	Lake	
Lake Anna	Lake	
South Fork Rivanna River Reservoir	Reservoir	
Broaddus Pond	Lake	
Elliots Pond	Lake	
Lake Moomaw	Lake	
Lake Caroline	Lake	
Swift Creek Reservoir	Lake	
Carvin Cove Reservoir	Lake	
Lake Chesdin	Lake	
Smith Mountain Lake	Lake	
Lees Millpond	Lake	
Nottoway Reservoir	Lake	
Philpott Lake	Lake	
John H. Kerr Reservoir	Reservoir	
Hyco Reservoir	Reservoir	
Lake Gaston	Lake	
Mayo Reservoir	Reservoir	
Hyco Lake	Lake	
Roanoke Rapids Lake	Lake	
Lake Burlington	Lake	
Lake Townsend	Lake	
Lake Butner	Lake	
Lake Michie	Lake	
Falls Lake Reservoir	Reservoir	
Dixie Caverns & Pottery, Inc.	Cavern	
Endless Caverns	Cavern	
Grand Caverns	Cavern	
Luray Caverns	Cavern	

Table 4 – Nature Tourism (continued)

Nature Tourism - 50-100 Miles (continued)		
Name	**Type of Attraction**	**Annual Visitors**
Shenandoah Caverns	Cavern	
Lost World Caverns	Cavern	
Douthat State Park	State Park	
Fairy Stone State Park	State Park	
Lake Anna State Park	State Park	
Occoneechee State Park	State Park	
Pocahontas State Park	State Park	
Cass Scenic Railroad State Park	State Park	
Falls Lake State Recreation Area	State Park	
Mayo River State Park	State Park	
Haw River State Park	State Park	
Occoneechee Mountain State Natural Area	State Park	
Eno River State Park	State Park	
Kerr Lake State Recreation Area	State Park	
Fort Lee Military Reservation	National Park	
Petersburg National Battlefield	National Park	
Richmond National Battlefield Park	National Park	
George Washington National Forest	National Forest	
Jefferson National Forest	National Forest	
Monongahela National Forest	National Forest	
Fredericksburg and Spotsylvania Co. Battlefields Memorial National Military Park	National Park	
Booker T. Washington National Monument	National Park	
Shenandoah National Park	National Park	
Blue Ridge Parkway	National Park	
James River National Wildlife Refuge	National Park	
Presquile National Wildlife Refuge	National Park	
Barbours Creek Wilderness	National Forest	
Mountain Lake Wilderness	National Forest	
Ramseys Draft Wilderness	National Forest	
Rich Hole Wilderness	National Forest	
Rough Mountain Wilderness	National Forest	
Shawvers Run Wilderness	National Forest	
Shenandoah Wilderness	National Forest	

Table 5 – Primary Purpose of Trip - Virginia

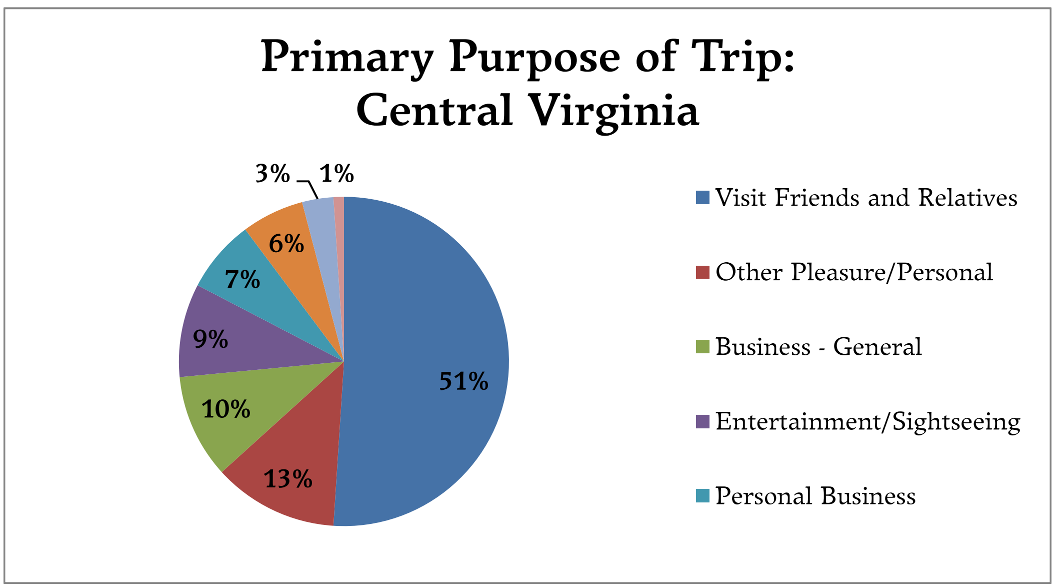
Primary Purpose of Trip	Virginia
Visit Friends and Relatives	48%
Other Pleasure/Personal	15%
Entertainment/Sightseeing	12%
Business - General	9%
Personal Business	6%
Outdoor Recreation	5%
Business - Conference/seminar	2%
Other	2%
Business - Convention/tradeshow	1%



Source: Virginia Tourism Corporation

Table 6 – Primary Purpose of Trip – Central Virginia

Primary Purpose of Trip	Central Virginia
Visit Friends and Relatives	50%
Other Pleasure/Personal	12%
Business - General	10%
Entertainment/Sightseeing	9%
Personal Business	7%
Outdoor Recreation	6%
Business - Conference/seminar	3%
Other	1%
Business - Convention/tradeshow	<0.50%



Source: Virginia Tourism Corporation

Table 7 – Travel Party Origin by Designated Market Area

	DESTINATION		PURPOSE*		ACTIVITIES & ATTRACTIONS*			
Travel Party Origin	**Virginia**	**Central Virginia**	**Leisure**	**Business**	**Historic/ Civil War**	**Arts/ Culture**	**Entertainment/ Amusement**	**Sports Recreation/Nature**
Designated Market Area								
Washington,DC (Hagerstown)	12%	11%	13%	7%	10%	13%	15%	17%
Norfolk-Portsmouth-Newport News	7%	14%	7%	5%	8%	7%	8%	6%
Richmond-Petersburg	7%	11%	6%	10%	10%	11%	9%	12%
New York	6%	4%	8%	-	10%	7%	6%	5%
Roanoke-Lynchburg	6%	10%	5%	5%	5%	5%	8%	7%
Raleigh-Durham (Fayetteville)	4%	6%	4%	3%	-	-	3%	3%
Philadelphia	3%	2%	4%	-	4%	-	2%	4%
Baltimore	3%	3%	3%	3%	4%	4%	2%	3%
Greensboro-High Point-Winston Salem	2%	-	2%	3%	-	-	-	2%
Charlotte	2%	4%	-	7%	-	-	-	-
Charlottesville	-	4%	2%	-	-	3%	2%	3%
Albuquerque-Santa Fe	-	-	-	6%	-	-	-	-
Phoenix-Prescott	-	-	-	3%	-	-	-	-
Tampa-St. Petersburg (Sarasota)	-	-	-	-	3%	-	-	-
Atlanta	-	-	-	-	2%	3%	-	-
Chicago	-	-	-	-	2%	-	2%	-
Johnstown-Altoona	-	-	-	-	-	3%	-	-

**for trips anywhere in Virginia*

Source: Virginia Tourism Corporation

Table 8 – Travel Party Origin by State

	DESTINATION		PURPOSE*		ACTIVITIES & ATTRACTIONS*			
Travel Party Origin	Virginia	Central Virginia	Leisure	Business	Historic/ Civil War	Arts/ Culture	Entertainment/ Amusement	Sports Recreation/Nature
State								
Virginia	30%	47%	31%	23%	34%	42%	41%	44%
North Carolina	11%	13%	10%	15%	6%	5%	8%	8%
New York	8%	3%	7%	-	6%	3%	5%	4%
Maryland	6%	6%	7%	5%	5%	5%	6%	8%
Pennsylvania	5%	3%	6%	4%	9%	8%	7%	7%
Florida	5%	3%	5%	4%	6%	5%	5%	4%
New Jersey	4%	2%	4%	-	5%	5%	3%	3%
Georgia	3%	3%	3%	-	2%	3%	-	-
West Virgnia	3%	2%	-	-	-	-	-	-
California	2%	-	-	3%	3%	3%	-	-
New Mexico	-	-	-	6%	-	-	-	-
Texas	-	-	-	5%	-	-	-	-
Massachusetts	-	-	-	4%	-	-	-	-
Tennessee	-	-	-	3%	-	-	-	2%
Ohio	-	-	-	-	3%	2%	2%	2%
South Carolina	-	-	-	-	-	-	3%	3%
Illinois	-	-	-	-	-	-	2%	-

**for trips anywhere in Virginia*

Source: Virginia Tourism Corporation

Table 9 – Mode of Travel Used on Entire Trip

Modes of Travel Used on Entire Trip	
Own Auto/Truck	79%
Airplane	16%
Rental Car	9%
Bus	6%
Train	3%
Other	3%
Camper/RV	2%
Motorcoach	2%
Ship/Boat	1%

Source: Virginia Tourism Corporation

Table 10 – Month/Season of Travel

	DESTINATION		PURPOSE*		ACTIVITIES & ATTRACTIONS*			
Month	Virginia	Central Virginia	Leisure	Business	Historic/ Civil War	Arts/ Culture	Entertainment/ Amusement	Sports Recreation/Nature
July	12%	11%	12%	11%	15%	11%	11%	12%
August	11%	12%	11%	8%	12%	13%	9%	13%
September	7%	8%	7%	9%	7%	10%	8%	8%
October	8%	9%	8%	11%	12%	11%	10%	12%
November	7%	10%	7%	7%	8%	10%	11%	11%
December	9%	8%	9%	2%	7%	7%	9%	5%
January	5%	7%	5%	5%	5%	5%	5%	4%
February	5%	5%	5%	7%	5%	6%	5%	6%
March	8%	8%	8%	14%	8%	7%	8%	5%
April	10%	7%	10%	9%	6%	6%	8%	6%
May	8%	9%	8%	14%	7%	8%	6%	8%
June	10%	6%	10%	3%	8%	6%	10%	9%

Season	Virginia	Central Virginia	Leisure	Business	Historic/ Civil War	Arts/ Culture	Entertainment/ Amusement	Sports Recreation/Nature
Summer	33%	32%	33%	22%	35%	30%	30%	34%
Spring	26%	20%	26%	37%	21%	21%	22%	19%
Fall	22%	23%	22%	27%	27%	31%	29%	31%
Winter	19%	25%	19%	14%	17%	18%	19%	15%

**for trips anywhere in Virginia*

Source: Virginia Tourism Corporation

Table 11 – Ages/Size of Travel Party

	DESTINATION		PURPOSE*		ACTIVITIES & ATTRACTIONS*			
Party Size	**Virginia**	**Central Virginia**	**Leisure**	**Business**	**Historic/ Civil War**	**Arts/ Culture**	**Entertainment/ Amusement**	**Sports Recreation/Nature**
1	29%	31%	23%	61%	19%	20%	27%	26%
2	41%	40%	44%	25%	46%	45%	45%	42%
3	12%	11%	13%	6%	11%	12%	13%	13%
4	10%	12%	11%	5%	13%	14%	8%	11%
5	4%	2%	4%	1%	4%	3%	3%	4%
6+	5%	4%	5%	2%	7%	6%	4%	4%
Mean:	2.9	2.6	3	2.4	3.6	3.2	2.4	2.6
Median:	2	2	2	1	2	2	2	2

Ages	**Virginia**	**Central Virginia**	**Leisure**	**Business**	**Historic/ Civil War**	**Arts/ Culture**	**Entertainment/ Amusement**	**Sports Recreation/Nature**
< 6 years	-	5%	-	-	4%	6%	6%	6%
6 to 12	-	6%	-	-	7%	9%	6%	8%
13 to 17	-	5%	-	-	7%	6%	5%	6%
18 to 24	-	9%	-	-	8%	11%	9%	9%
25 to 34	-	19%	-	-	16%	14%	17%	15%
35 to 44	-	17%	-	-	14%	14%	14%	16%
45 to 54	-	14%	-	-	16%	17%	14%	14%
55 to 64	-	15%	-	-	16%	14%	17%	17%
65+	-	9%	-	-	12%	9%	12%	9%
w/children[1]	21%	19%	24%	5%	23%	27%	20%	22%

**for trips anywhere in Virginia*

[1] Parties with children under 18

Source: Virginia Tourism Corporation

Table 12 – Overnights and Lodging

	DESTINATION		PURPOSE*		ACTIVITIES & ATTRACTIONS*			
Total Nights Spent on Entire Trip	**Virginia**	**Central Virginia**	**Leisure**	**Business**	**Historic/ Civil War**	**Arts/ Culture**	**Entertainment /Amusement**	**Sports Recreation/Nature**
0	16%	23%	14%	11%	12%	16%	11%	15%
1	12%	15%	11%	11%	13%	12%	13%	15%
2	18%	20%	19%	18%	18%	18%	25%	20%
3	13%	14%	12%	19%	16%	13%	14%	14%
4	8%	6%	8%	9%	8%	8%	8%	8%
5	7%	5%	7%	8%	9%	7%	7%	6%
6	4%	3%	4%	4%	4%	4%	3%	4%
7	5%	3%	5%	2%	7%	5%	5%	5%
8 to 13	13%	9%	14%	12%	10%	13%	10%	9%
14+	5%	1%	5%	6%	4%	5%	4%	4%
Mean:	4.3	3	4.5	4.5	4.2	4.3	4	3.8
Median:	3	2	3	3	3	3	3	2

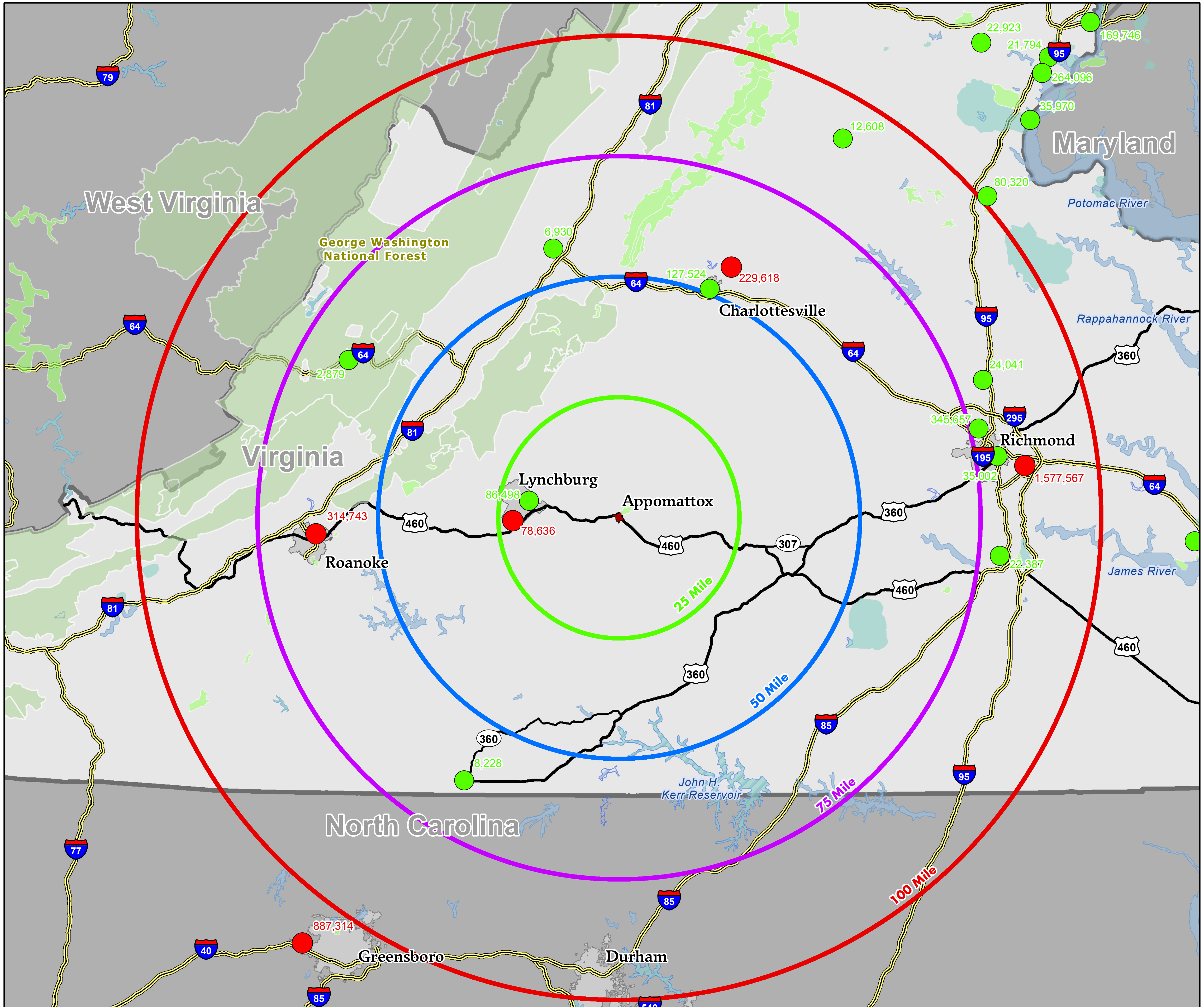
Number of Nights at Lodging in Virginia	**Virginia**	**Central Virginia**	**Leisure**	**Business**	**Historic/ Civil War**	**Arts/ Culture**	**Entertainment /Amusement**	**Sports Recreation/Nature**
1	29%	28%	29%	22%	23%	29%	21%	29%
2	25%	30%	25%	26%	22%	25%	27%	23%
3	15%	15%	15%	20%	18%	15%	16%	16%
4	8%	7%	8%	11%	9%	8%	8%	8%
5+	22%	19%	23%	21%	29%	22%	28%	25%
Mean:	3.4	3.1	3.4	3.6	3.6	3.4	3.9	3.7
Median:	2	2	2	2	3	2	3	2

Types of Lodging Used in Virginia	**Virginia**	**Central Virginia**	**Leisure**	**Business**	**Historic/ Civil War**	**Arts/ Culture**	**Entertainment /Amusement**	**Sports Recreation/Nature**
Hotel/Motel	44%	46%	38%	76%	46%	44%	33%	35%
Private Home	42%	42%	47%	13%	35%	42%	53%	40%
Other	5%	5%	5%	5%	5%	5%	4%	8%
RV/Tent	4%	3%	4%	2%	3%	4%	2%	7%
B&B	1%	2%	1%	3%	2%	1%	1%	2%
Condo	2%	1%	2%	< 0.5%	2%	2%	2%	3%
Time Share	3%	1%	3%	< 0.5%	7%	3%	4%	5%

**for trips anywhere in Virginia*

Source: Virginia Tourism Corporation

Exhibit 1
Transportation
Appomattox, Virginia



Legend

- Airports
- Amtrak Stations
- ##,### Number of Deplanements in 2012
- ##,### Number of Passengers

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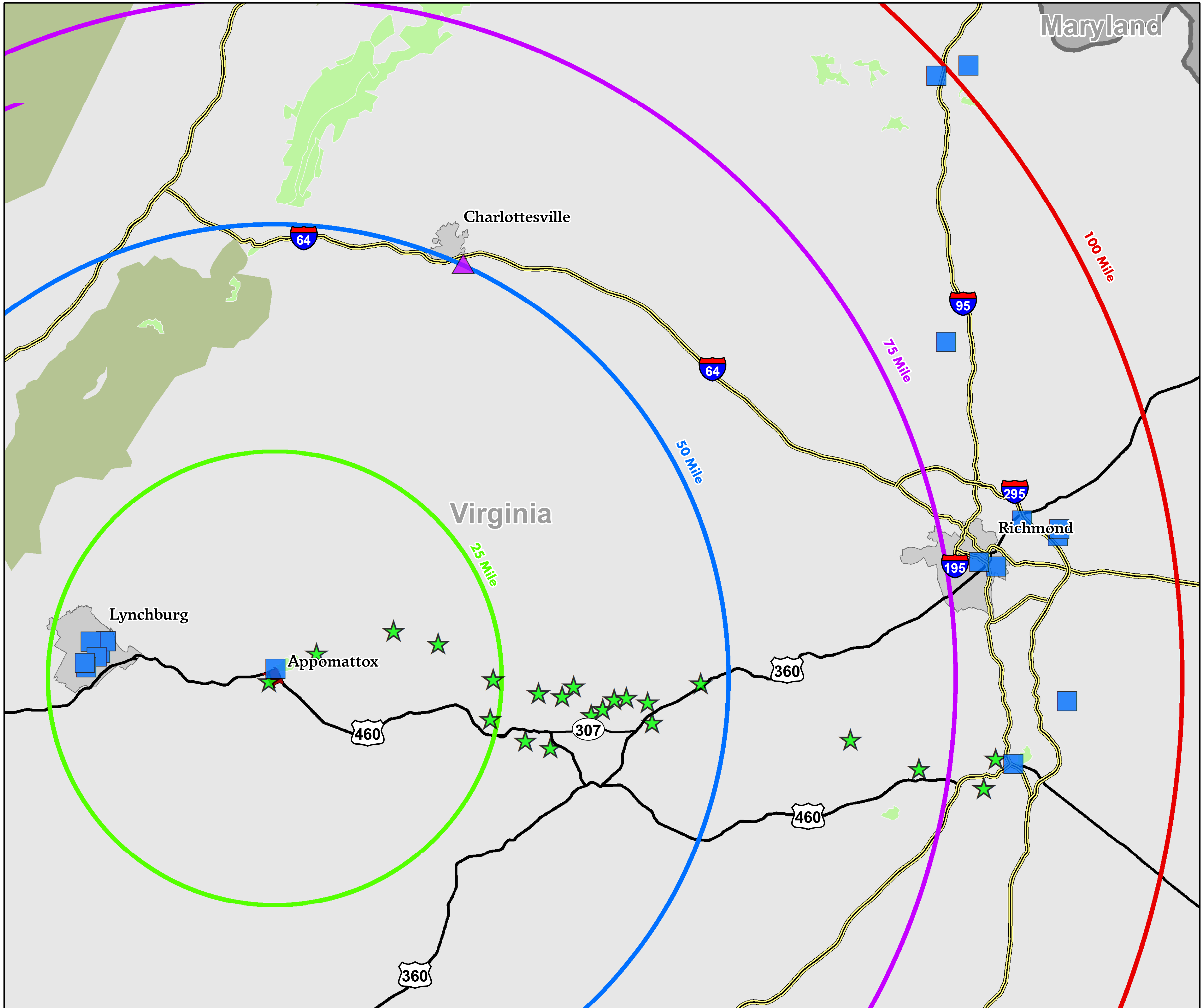
0 10 20 40
Miles

N

July 2013

Exhibit 2
Historical Tourism

Appomattox, Virginia



Legend

- Monticello
- Military
- Lee's Retreat Sites

0 5 10 20
Miles

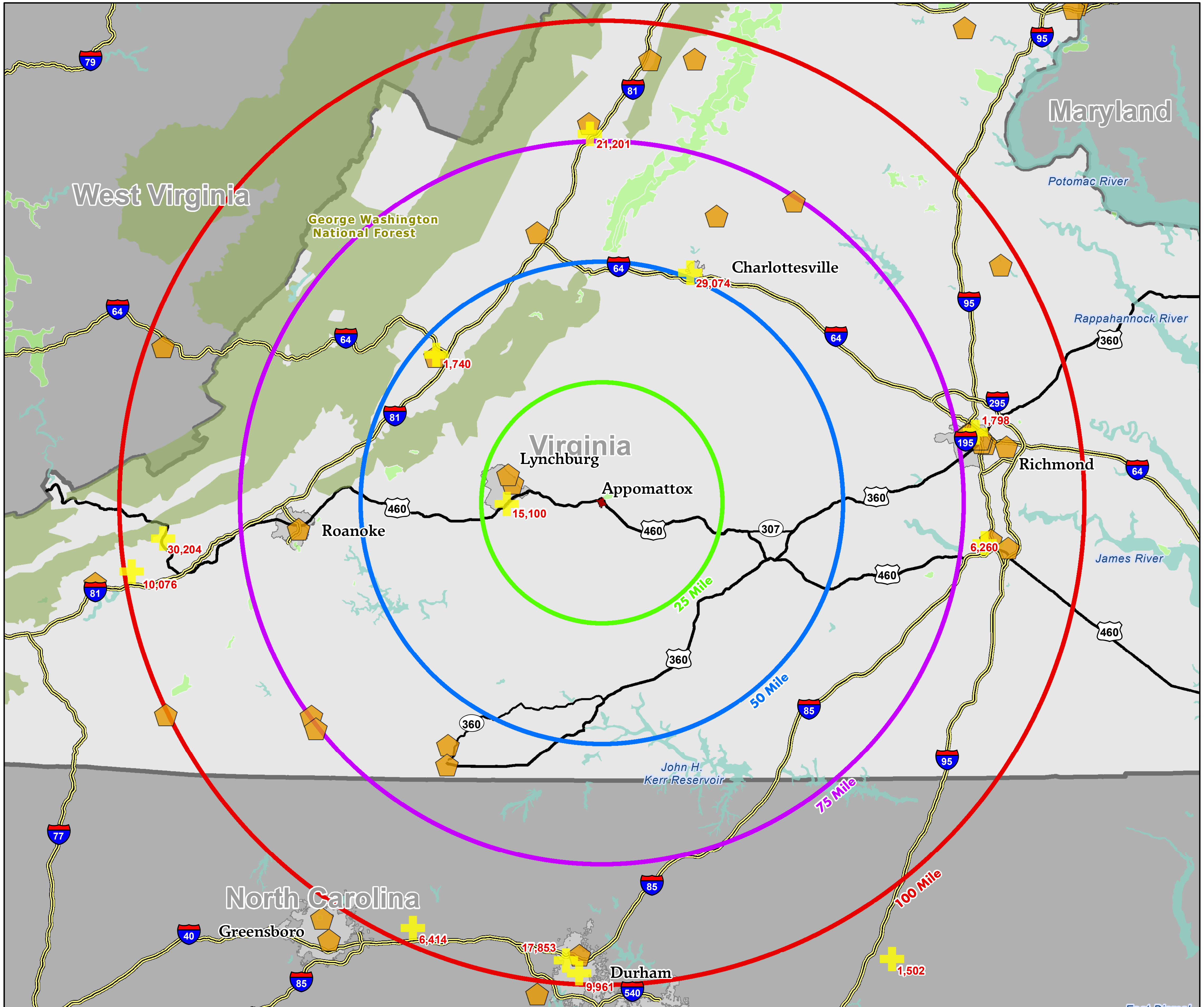
N

July 2013

PGAV PLANNERS

Exhibit 3
Educational Tourism

Appomattox, Virginia



Legend

Universities

Museums

29,074 Number of Students and Faculty

0 10 20 40
Miles

N

July 2013

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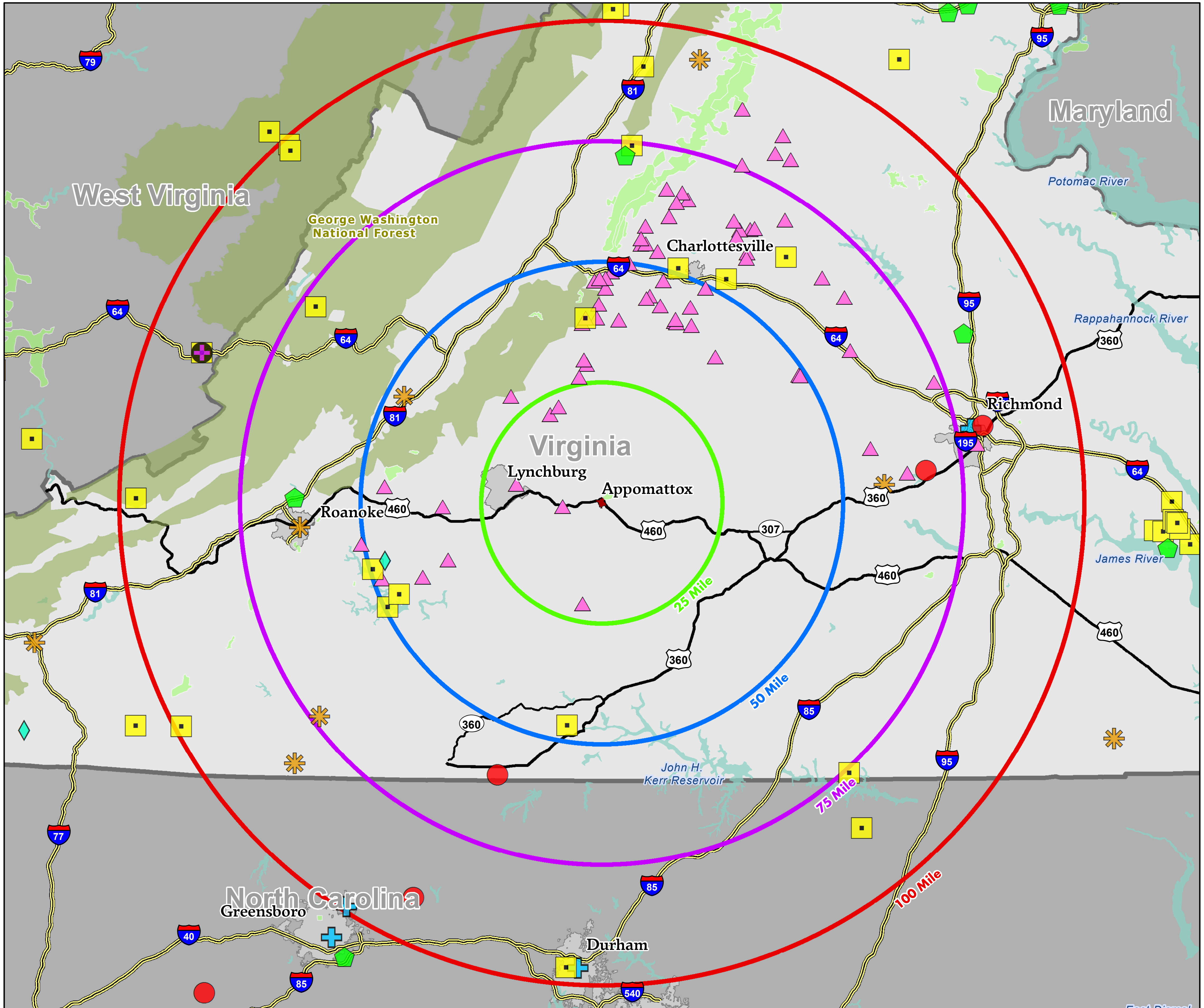
Exhibit 4
Recreational Tourism

Appomattox, Virginia



Legend

- Amusement Parks
- Zoos/Animal Parks
- Festivals
- Casinos
- Resorts
- Racing Venues
- Sports Stadiums/Arenas
- Wineries

0 10 20 40
Miles

N

July 2013

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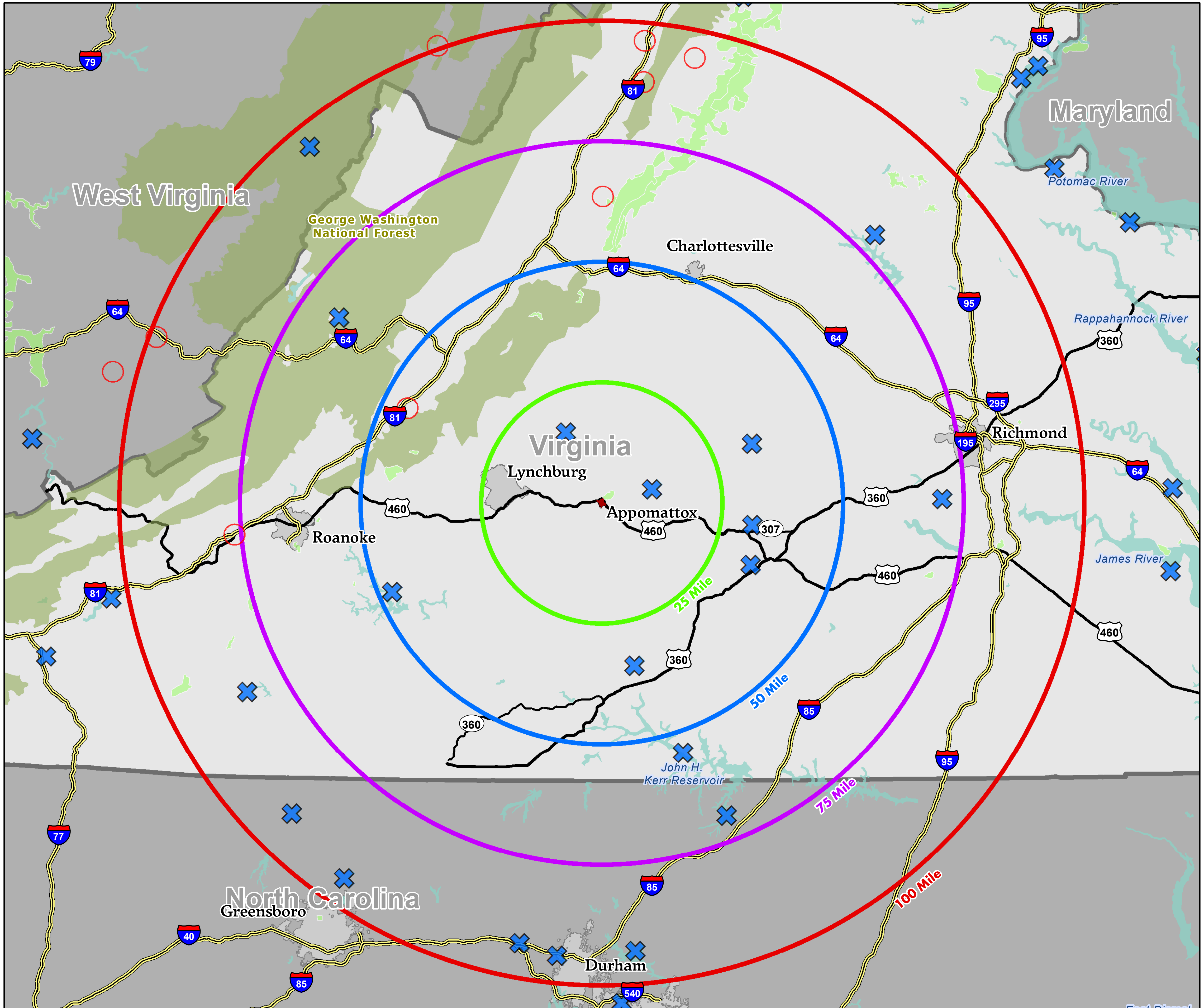

Exhibit 5
Nature Tourism

Appomattox, Virginia

Legend

- Caverns
- State Parks
- Significant Bodies of Water
- National Park Service
- National Forest

0 10 20 40
Miles

N

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