



ALEXANDRIA CONVENTION & VISITORS ASSOCIATION

2014 Advertising Effectiveness & ROI Study

January 9, 2015

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Introduction

Project Overview

This report presents the findings of an advertising effectiveness and return on investment study conducted by Destination Analysts, Inc. on behalf of the Alexandria Convention & Visitors Association, the organization charged with marketing Alexandria, VA as a global travel destination. Broadly speaking, this study's goal was to develop an understanding of the reach and impact of the organization's recent advertising campaigns. These campaigns ran between September 2013 and June 2014 and consisted of \$1.0 million in media placement in magazines, newspapers, Washington DC Metro stations, online ad networks, search engines, social media channels and other websites.

Research Objectives

As was done to evaluate previous advertising campaigns on behalf of the Alexandria Convention & Visitors Association, Destination Analysts executed a research plan to gather data to:

1. Evaluate the campaign's reach

- Measure brand awareness (unaided/aided)
- Develop advertising awareness and recall metrics (aided)
- Examine the impact of the campaign on travelers' perceptions of Alexandria, VA as a travel destination
- Evaluate the campaign's impact on travelers' likelihood to visit Alexandria, VA

2. Calculate Return on Investment

- Measure incremental visitation and spending generated as a result of the campaign (i.e., the total number of visitors that traveled to the Alexandria, VA area, the total number of hotel room nights generated and the total additional in-market spending generated)
- Estimate the incremental tax revenues generated by the campaign
- Gather information on traveler behaviors including data such as trip length, reasons for visit, place of stay, in-market expenditures, etc.

3. Evaluate the effectiveness of media options

- Provide the Alexandria Convention & Visitors Association with conclusions relative to the campaigns' strategy, effectiveness and options for future refinements

Methodology

To maximize efficiency and reliability, as well as consistency, an online survey methodology was chosen.

Survey sampling is intended to mirror the geographic focus of the advertising campaign, which targeted attracting travelers from key metropolitan areas. However, the reach of the ad campaign was broad and clearly went well beyond the boundaries of particular cities. Thus, the goals of this research required that a large survey sample be collected from a random selection of people residing within a 400 mile radius around Alexandria, VA.

Destination Analysts contracted with Survey Sampling International, a leading global sample provider, to reach out to its panel for survey collection. A survey invitation was sent to a randomly-selected sample of adult residents residing within a 400 mile radius of Alexandria, VA. To reliably evaluate the campaign's effectiveness in reaching residents of the targeted metropolitan areas, a robust survey sample was required. The chart following shows the number of completed surveys gathered in each of the target geographies.

	Sample Size
Baltimore and Washington DC DMAs¹	877
Within 400 miles of Alexandria (excluding the above DMAs)	3931
Total	4808

Confidence Level: Data from the overall survey can be considered to have a reliability of +/- 1.2% at a 95% confidence level. Data from Alexandria visitors can be considered to have a reliability of +/- 4.3% at a 95% confidence level.

Quick Facts:

The profile below shows a summary of key descriptive statistics and findings emerging from this study.

	2010*	2014
Traveled to Alexandria for leisure in past 12 months	10.9%	13.0%
Gross incremental travel ratio	6.1%	6.6%
Recall of any ad (total, aided)	9.9%	23.2%
Visitor spending in Alexandria, VA generated by the campaign	\$70,057,308	\$176,611,889
Overall return on investment per dollar invested	\$130	\$171
Tax revenues generated for Alexandria, VA	\$2,300,000	\$6,105,872
Tax return on investment per dollar invested	\$4	\$6
Percent of overnight visitors staying in Alexandria, VA hotels	57.0%	56.7%
Recall of magazine ads (aided)		
		14.6%
Recall of newspapers ads (aided)		
		12.1%
Recall of digital display ads (aided)		
		13.1%
Recall of digital video ads (aided)		
		12.6%
Recall of DC Metro/Outdoor ads (aided)		
		9.7%
Recall of leisure travel articles about Alexandria, VA in print media		
		12.6%
Recall of leisure travel features about Alexandria, VA in television media		
		10.6%
Percent agreeing that the advertising "effectively" or "very effectively" portrayed Alexandria, VA as a place they would want to visit for leisure		
		66.9%
Percent who feel the advertising makes them more likely to visit Alexandria, VA in the next 12 months		
		41.5%

*Research conducted by SMARI

Executive Summary

This study presents measurements of the reach and impact of the Alexandria CVA's 2013-2014 marketing and advertising campaigns, which ran between September and June. To conduct this study, an online survey was used to collect a large sample from adult residents across the Eastern United States. In total, 4,808 completed surveys were collected. In the Executive Summary following, the key findings from this study are outlined in brief.

Overall Campaign Effectiveness & ROI

- **In total, the campaign generated 593,001 incremental trips, 37.9 percent of which were taken by visitors who stayed overnight somewhere inside Alexandria (in hotels or as guests in private residences).** Of the remaining 63.1 percent of trips, these incremental visitors stayed outside Alexandria and took day trips into the city. In total, these two groups spent \$176.6 million inside Alexandria during the period of study. Given a campaign spend of just over \$1 million, this represents a 171 to 1 return on investment.
- **The campaign is estimated to have generated \$6.1 million in tax revenues for the city of Alexandria.** This suggests an overall tax ROI of 6 to 1.

Survey Findings

- **Alexandria faces particular competition from the East Coast's major urban destinations, Williamsburg, Charleston, Virginia Beach and Baltimore for top-of-mind awareness amongst travelers in the area of study.** To understand Alexandria's competitive landscape, survey respondents were asked to assume they wanted to take a getaway trip in the Eastern U.S. to a destination that is "historic, picturesque and romantic, while offering contemporary dining, unique shopping, arts and culture nearby a major metropolitan area" and then list the destinations that first came to mind. Travel thinking and trip consideration are dominated by the major urban destinations in the region—particularly New York City (38.1%), but also Boston (25.7%), Washington DC (22.2%) and Philadelphia (18.0%). Outside these core cities, Alexandria is exceeded in top-of-mind awareness by two other Virginia destinations—Williamsburg (12.0%) and Virginia Beach (6.9%)—as well as Charleston, SC (10.9%)

and Baltimore, MD (6.8%). In total, 1.1 percent of survey respondents wrote in Alexandria, VA as one of the top Eastern U.S. destinations that they would think of for this type of experience, emphasizing the unrealized opportunity for marketing to better Alexandria's position in the typical travelers' consideration set. (Figure 5.1, Page 21)

- **Magazines—particularly travel, food and lifestyle magazines—continue to be popular amongst residents of the area of study.** Survey respondents were shown a list of the magazines the campaign advertising ran in and were asked to select those which they recalled reading or looking through in the past year. Nearly 78 percent reported having read at least one of the magazines on the campaign media schedule. (Figure 5.2, Page 22)
- **With the local focus of this media, newspapers have a more limited reach.** As with the magazines, respondents were then shown the newspapers used in the campaigns and asked to identify those they had read or looked through at least once in the past 12 months. Given these media's specific geographic focus, a smaller proportion (45.0%) of survey respondents had read at least one of the newspapers on the campaign's media schedule in the past year. With its status and broad focus, *The Washington Post* had the greatest percentage of respondents say they had read or looked through it in the last year (34.2%). (Figure 5.3, Page 23)
- **Approximately three in four of those surveyed used Google and/or Facebook in the past year.** Survey respondents were also shown a list of websites and asked which ones they visited at least once in the past 12 months. Google and Facebook usage was reported by approximately three quarters of respondents (76.3% and 71.8% respectively). Major travel websites were the next most utilized of the online media tested, with 37.0 percent of respondents reporting visiting Expedia and 35.7 percent using TripAdvisor. About 16 percent used WashingtonPost.com and nearly 11 percent had visited Smithsonian.com. Amongst the official destination websites, 6.0 percent had used Virginia.org and 3.8 percent had used Washington.org. (Figure 5.4, Page 24)
- **The respondents surveyed took an average of 2.9 leisure trips in the past year.** While 16.8 percent took no leisure trips, and 18.2 percent took only one trip, a majority of adults living in the area of study traveled multiple times for leisure in the past year (64.9%). This represents an opportune environment to market Alexandria as an option for one or more of these trips. (Figure 5.5, Page 25)
- **Despite less top-of-mind awareness, greater than one in ten travelers in the area of study visited Alexandria in the last year.** Those survey respondents who reported having traveled at least once for leisure in the past year were then presented a list of regional cities and asked which they had visited for leisure in the previous 12 months. In total, 13.0 percent of travelers (11% of Destination and 25% of Regional) have

visited Alexandria in the last year. Travel behavior, like travel thinking, is dominated by the major cities. New York was the top regional destination, with 31.7 percent of this group having visited the city in the past year. Washington, DC and Philadelphia followed with 28.7 percent and 25.5 percent having traveled to these cities in the previous 12 months. (Figure 5.7, Page 26)

- **These Alexandria visitors took an average of 3.3 leisure trips to the city.** While the majority of survey respondents said they took just one leisure trip to Alexandria (42.4%), over 50 percent took multiple trips to the city for leisure. (Figure 5.8, Page 27)
- **Visitor traffic to Alexandria from the region and surrounding 400-mile radius appears to be highest in the late spring-early summer months.** Respondents who took at least one leisure trip to Alexandria in the past year were asked in which month(s) they visited. Visitor traffic to Alexandria from this group appears to be at its lowest point in January (14.1%) and February (14.5%), and reach its highest point in May and June (25.0% and 25.3%, respectively). (Figure 5.9, Page 28)
- **Day trips and trips to visit local friends and relatives (VFR) are significant tourism drivers to Alexandria.** Respondents visiting Alexandria in the past year were asked the primary purpose of their most recent leisure trip to the city. For Destination travelers 35 percent were day tripping and 24 percent were visiting friends and relatives. For Regional travelers, 49 percent were day tripping and 25 percent were visiting friend and relatives. Approximately one in five respondents characterized their visit to Alexandria, VA as a “vacation.” This demonstrates the opportunity the Alexandria CVA has to motivate longer stays and visitors to stay in hotels through its marketing. (Figure 5.10, Page 29)
- **Over half of Alexandria visitors surveyed traveled to the city with their spouse, partner or significant other (56.1%).** Although Alexandria is primarily an adult destination, the city does however, attract an important share of the region’s family travel market. 21.9 percent of visitors had at least one child in their party. (Figure 5.11, Page 30)
- **Amongst the group studied, those who travel to Alexandria for leisure are most likely visiting the city as their primary trip destination, spending 2.2 days and 1.2 nights on average.** Survey respondents who visited Alexandria were asked a series of questions about their total trip length and the amount of that time spent specifically in Alexandria. The typical Alexandria visitor surveyed reported an average total trip length of 2.5 days, during which they visited Alexandria. The typical Alexandria visitor surveyed reported an average total trip length of 1.5 nights. Given the high proportion of day-trips reported, over half of visitors (54.2%) did not stay overnight outside their home during their trip in which they visited Alexandria. When asked how many of their total trip days they specifically spent in Alexandria they

reported an average of 2.2 days within the city out of a total trip length of 2.5 days. Further highlighting Alexandria as the prime trip focus while demonstrating the need to motivate longer stays, the average number of trip nights spent in Alexandria was 1.2 nights, out of a total trip length of 1.5 nights. 56.3 percent of visitors did not stay overnight in Alexandria during their trip. Destination market visitors average 2.4 days and 1.4 nights in Alexandria; Regional visitors average 1.7 days and 0.6 nights (Figures 5.12-5.15, Pages 31-34)

- **29 percent of Destination market and 15 percent of Regional market of Alexandria visitors surveyed stayed in commercial lodging inside the city.** However, as a significant number of these Alexandria visitors came to the city for a day trip on their most recent trip, the greatest proportion of visitors did not require overnight accommodations (54.3%). With 25.4 percent reporting their trip purpose as visiting friends and family, in total, 16.3 percent stayed overnight at the residence of a friend or family member. (Figure 5.16, Page 35)
- **Visitors surveyed spent an average of \$297.83 for their travel party in the city of Alexandria during their trip.** Average Destination market spending was \$346.86 and Regional spending was \$266.37. Alexandria visitors were asked to report their trip spending across several categories. By far, the largest proportion of this spending was on restaurants & dining (\$106.11). Other visitor spending was spread fairly evenly across lodging (\$49.90), retail (\$48.39), entertainment & sightseeing (\$42.88) and gas, parking & transportation (\$41.49). These visitors were then asked how many people their total spending in the city covered. Reported visitor spending covered 2.4 persons on average, making the mean per-person spending represented by these Alexandria visitors \$125.57. (Figures 5.17-5.18, Pages 36-37)
- **The reported average Alexandria travel party amongst these visitors consisted of 3.3 people.** The largest proportion of which were adults over the age of 18 (2.81 adult party members on average). (Figure 5.19, Page 38)
- **For travelers in the area of study, Alexandria’s restaurants and food scene (46.3%) as well as its close proximity to Washington, DC (40.2%) and easy accessibility (38.7%) were the most important motivating factors in choosing Alexandria as a travel destination.** Alexandria being clean and safe (33.6%) and walkable (31.4%), as well as its waterfront location (30.5%) and overall ambiance and atmosphere (30.1%) were also important to why visitors selected the city as their destination. Visit motivators were similar for both Destination and Regional respondents with Restaurants, DC Proximity and Walkability being key for both groups. Only History stood out as a destination market factor that did not matter as much to Regional visitors. (Figure 5.20, Page 39)
- **Given the importance of the food and restaurant scene as a destination attribute, dining in restaurants was the most common visitor activity (59.8%).** Shopping

(42.4%), strolling King Street (41.8%) and visiting the waterfront (36.6%) were also among the most popular visitor activities. (Figure 5.21, Page 40)

- **Over half of these Alexandria visitors also spent time in Washington, DC on their trip (54.3%).** Just over a quarter went to Arlington, VA (26.9%), 21.8 percent visited Tysons Corner, VA and 18.5 percent spent time somewhere else in Northern Virginia during their Alexandria trip. These visitors were less likely to spend time in Maryland on their trip to Alexandria. (Figure 5.22, Page 41)
- **Familiarity with Alexandria as a leisure destination is strong** with 44 percent of Destination and 62 percent of Regional visitors at least “somewhat familiar with Alexandria. Less than a quarter of residents in the area of study feel they are “not at all familiar” with Alexandria. (Figure 5.23, Page 42)
- **Alexandria has a high degree of potential to attract visitors for leisure in the coming year.** 19 percent of Destination and 32 percent of Regional visitors report that they are “very likely” or “certain” to visit Alexandria in the next twelve months. (Figure 5.24, Page 43)
- **In an *unaided* question, survey respondents were asked if they had seen or heard any advertisements for travel to Alexandria in the last 12 months. Without visual prompting, 14.4 percent reported with certainty that they recalled seeing or hearing any advertising for travel to Alexandria.** Another 18.4 percent were unsure. (Figure 5.25, Page 44)
- **Unaided recall of Alexandria tourism advertising is primarily recalled in print, followed by digital media.** Respondents who said they recalled seeing advertising for leisure travel to Alexandria in the past year were asked to select the media in which they had seen this advertising. The most significant percentage of respondents who recalled seeing Alexandria travel advertising said they saw an ad(s) in a magazine (50.9%). Over 40 percent recalled seeing such advertising on the Internet, and 33.7 percent said they saw the advertising in a newspaper. Given these results, residents of the area of study were fairly likely to have been exposed to Alexandria tourism messages across multiple media. (Figure 5.26, Page 45)
- **14.6 percent recalled seeing the campaign’s magazine ads.** Of the campaign media tested in the survey, magazines had the highest recall. [Magazines also enjoyed the highest levels of unaided recall, with 50.3 percent saying they saw an Alexandria leisure ad(s) in a magazine.] One of the factors contributing to these results is likely the wide geographic area covered by the magazine media used in the campaign. (Figure 5.27, Page 46)
- **Similarly, penetration by the campaign’s newspaper advertisements reached more than one in ten residents of the area study.** 12.1 percent of survey respondents said

they recall having seen one or more of the ads that appeared in newsprint. (Figure 5.28, Page 47)

- **13.1 percent said they had in fact seen the campaign’s digital display ads.** Digital display advertising had the second highest recall rate of the ad creative/media tested. (Figure 5.29, Page 48)
- **Similar to the recall rates for the digital display ads, 12.6 percent said they recalled seeing the video ad online in the past year.** (Figure 5.30, Page 49)
- **The advertising creative was very effective at positioning Alexandria as an attractive leisure destination.** After viewing the major creative components of the campaign, respondents were asked how effective the ads are in portraying Alexandria as a place they would enjoy visiting for leisure reasons. Two-thirds of respondents (66.9%) agreed that the campaign creative is “effective” or “very effective” in portraying Alexandria as a place they would enjoy visiting for leisure. Only 9.2 percent felt the advertising was “ineffective” or “very ineffective.” (Figure 5.32, Page 51)
- **Respondents had the highest agreement that the advertising campaign effectively portrayed Alexandria as “a place with a vibrant arts & cultural scene” (78.6%), “a historical place” (77.8%), “a place with an exciting food and dining scene” (77.0%) and “a romantic place” (76.0%).** While the advertising was rated strongly as effective for most positioning objectives tested, the ads are relatively less effective at portraying Alexandria as a “good value,” “a good place for a family vacation” and “a good place for a business meeting.” (Figure 5.33, Page 52)
- **The advertising creative motivates interest in visiting Alexandria.** Survey respondents were asked how the ads they viewed would affect their likelihood to visit Alexandria in the next year. Over 40 percent of respondents felt that the ads made them more likely to visit Alexandria. Only 4.7 percent said the ads had a negative effect on their likelihood to visit, while 7.6 percent were unsure. The remaining half said they were “Unchanged” in their likelihood to visit Alexandria. (Figure 5.34, Page 53)
- **The advertising was motivational to a significant number of these Alexandria visitors.** Those survey respondents who reported having made at least one trip to Alexandria in the past year and who recalled seeing at least one of the ads were asked if the ad or ads they saw had in any way influenced their decision to visit Alexandria. 52.5 percent of these persons reported that the advertising did indeed influence their decision to visit Alexandria. (Figure 5.35, Page 54)
- **The media used in the campaign appears to be reaching potential visitors at a point of influence.** Those survey respondents who reported having made at least one trip to Alexandria in the past year and who recalled seeing at least one of the ads were

asked at what point in their decision process they were when they saw this advertising. 40.2 percent report having been at a point of potential influence. (Figure 5.36, Page 55)

- **Public relations efforts have generated earned media for Alexandria that an important number of residents of the area of study recall.** In total, 12.6 percent of this group reported having seen a newspaper or magazine article about leisure travel to Alexandria in the past year. At this level, awareness of public relations is very close to the 14.4% reported for advertising. This suggests that public relations is highly efficient, given that spending on P.R. was one tenth that of advertising. (Figures 5.37-5.39, Page 56-58)
- **In total, 41.9 percent of those surveyed said they were “likely” or “very likely” to recommend Alexandria as a place to visit.** Another 32.2 percent said they were “somewhat likely.” (Figure 5.40, Page 59)

Demographic Profile of Survey Respondents

- **Survey respondents skewed female, with 64.6 percent being women.** (Figure 6.1, Page 61)
- **Survey respondents were fairly evenly spread amongst millennials, GenX and Baby Boomers.** The mean age is 43.6 years. (Figure 6.1, Page 62)
- **The majority of survey respondents are employed in some capacity (60.4%).** 39.8 percent are employed full-time and another 6.9 percent are self-employed. 13.8 percent are employed part-time. (Figure 6.2, Page 63)
- **Over three quarters of survey respondents have at least some college education.** 45.6 percent hold at least a bachelor’s degree, including 18.5 percent who have a graduate degree. (Figure 6.3, Page 64)
- **The average annual household income of survey respondents is \$74,090 with 54 percent having an annual household income in excess of the \$50,000 threshold.** (Figure 6.4, Page 65)
- **The majority (74.3%) of respondents are Caucasian.** Greater than one in ten is African-American (11.8%). Asians represented 5.4 percent of respondents and Latinos 4.6 percent. (Figure 6.5, Page 66)
- **53.4 percent of survey respondents reported being married or in a domestic partnership.** More than a third (35.8%) of respondents are single. 20.8 percent have children under the age of 18. (Figure 6.7, Page 67)

Return on Investment Analysis

Advertising Effectiveness and Program ROI Evaluation

This report is the first advertising effectiveness study conducted for the Alexandria Convention & Visitors Association by Destination Analysts, Inc. In this report, we present estimates of the advertising campaign's effectiveness in attracting visitors to Alexandria, VA during and following the campaign period.

This presentation of findings begins with the core of the research—estimates of the campaign's reach and the visitor spending it generated for Alexandria, VA.

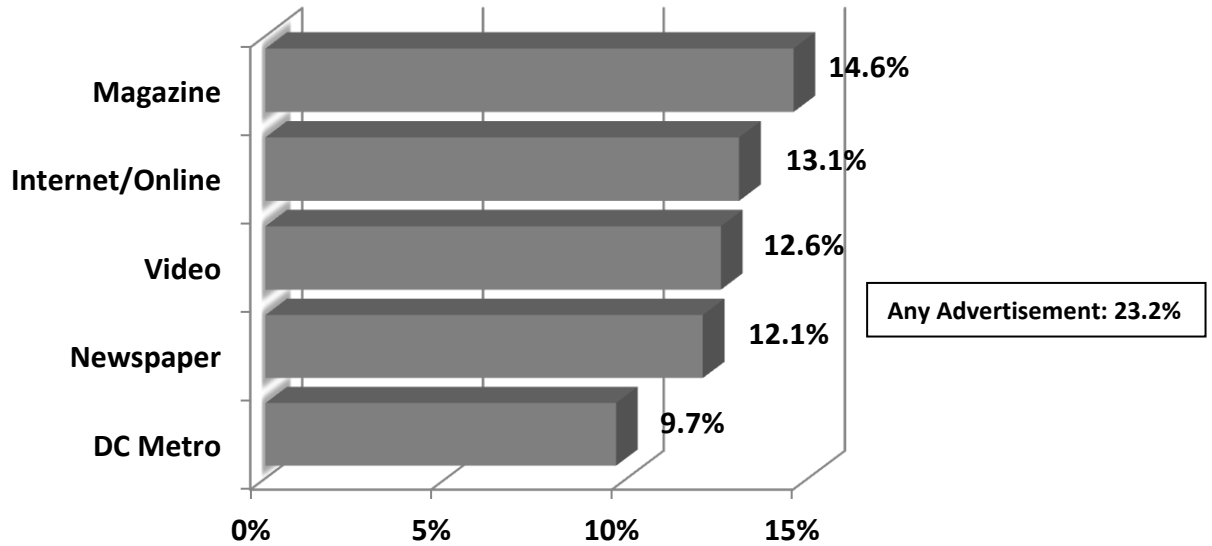
Evaluating the Campaign's Reach

The survey asked respondents (in an unaided question) if in the past 12 months they recalled seeing any advertisements (in magazines, newspapers, visitors guides, online, in an app, or on the radio) for leisure travel to Alexandria, VA. 14.4 percent of respondents recalled seeing such advertisements, with an additional 18.4 percent uncertain.

These general levels of unaided recall are similar to the results emerging from the survey's questions on aided advertising recall. Survey respondents were asked to look at the campaign's advertisements [print, digital display, outdoor (DC Metro), and video] and then indicate if they had seen the advertisements. Figure 4.1 (following) shows aided recall of the advertisements by media, or the percent of survey respondents who recalled having seen each type of advertisement.

Among the advertising types tested, the print advertisements were the most widely recalled, with 14.6 percent of all respondents having seen these ads. Closely following in terms of recall were the digital display ads, in which a total of 13.1 percent of respondents recalled seeing. The digital video advertisement was remembered by 12.6 percent. The medium of lowest overall aided recall were the campaign's DC Metro ads (9.7%). Of course, this is largely driven by the limited geography of this advertising medium.

Figure 4.1: 2014 Overall Advertising Recall (Percent of respondents who recall seeing advertisements – Aided Recall)



Note: Figures shown above are based on all respondents in all areas.

Media Overlap

In total, 16.8 percent of survey respondents recalled having seen two or more of the five advertising types tested (Figure 4.2, below). One in four (23.2%) saw one or more of the ads. The majority of residents of the overall study area did not see any of the advertisements (76.7%).

Figure 4.2: Number of Advertising Media Where Ads Were Seen

	Total
No Advertisements	76.7%
Any Advertisement	23.2%
One	6.5%
Two	5.7%
Three	4.3%
Four	2.4%
Five	4.3%

Media Efficiency

Using the percent of survey respondents who recalled having seen Alexandria, VA advertisements, we can calculate estimates of the number of impressions¹ each type of advertising received. The chart below shows the calculation of the cost per impression using aided awareness statistics collected in the survey. Using this method, each impression is estimated to have cost about 3 cents on average. The relatively most expensive impressions to obtain were from Magazines (6 cents) and the least expensive were from DC Metro stations (< 1 cent).

Figure 4.3: The Cost of Advertising Impressions by Media (Aided)

	Reported Impressions	Alexandria Investment	Cost per Impression
Magazine	5,575,685	\$321,000	\$0.06
Digital Display	5,002,841	\$253,000	\$0.05
Newspaper	4,620,945	\$95,000	\$0.02
Digital Video	3,971,721	\$69,000	\$0.02
DC Metro/Outdoor	3,704,394	\$21,000	\$0.005

Note: Reported "Impressions" are calculated as the percent of an area's population multiplied by the proportion of survey respondents reporting that they saw an advertisement.

Return on Investment (ROI) Measurement

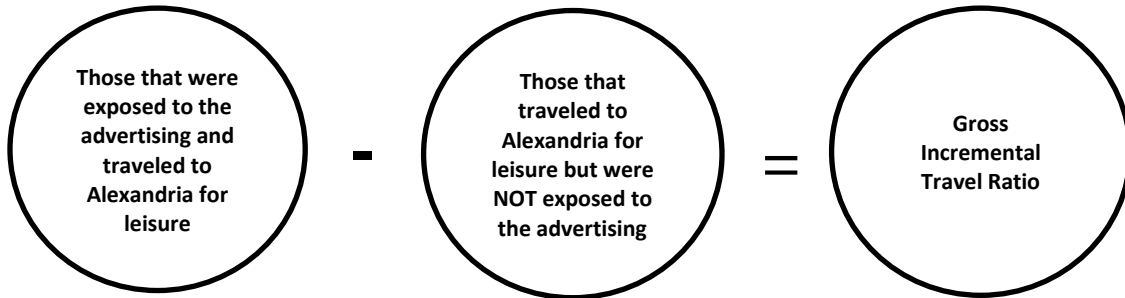
A key objective of this research was to estimate incremental visitation and consequent visitor spending and taxes generated by the marketing program. Incremental visitation is defined as travel to Alexandria that is a direct result of the advertising campaigns or, alternatively, it is visitation that would not have occurred in the absence of the advertising campaigns. Spending on such incremental trips generated income for local businesses and tax revenues for the local government, which are key indicators of the success of the advertising.

For comparability purposes, the technique used in this study to estimate incremental visitation is identical to the technique used by the Alexandria Convention & Visitors Association in the past. The methodology for measuring the economic impact of Alexandria's advertising and marketing used here includes only those trips that would not have occurred in the absence of the advertising. Because some travel to Alexandria would occur even if the CVA did no advertising at all, not all trips are considered to be incremental travel. Incremental travel to Alexandria is estimated by comparing the rate of travel to the city among those who are aware of the advertising to the rate of travel among those who are not aware of the campaign. That is, the rate of travel to Alexandria of those who recall being exposed to the ads is compared to the rate of

¹ An advertisement's "impressions" are defined here as the geographic area's adult population multiplied by the proportion of this population reporting having seen an advertisement.

travel to the city of those who do not recall having seen the advertisements. The additional volume of travel by the aware population is considered here as directly attributable to the marketing, and is referred to as the *gross incremental travel ratio*.

Figure 4:4 Gross Incremental Travel Ratio



Calculation of Incremental Visitation & Spending

Examining survey respondent travel patterns in the past year, an overall factor for incremental visitation was calculated at 6.6 percent. This figure represents the difference between persons visiting Alexandria during the period of study who recall seeing the ads (17.5%) and those who do not recall seeing any of the advertisements (10.9%). While this overall figure is informative, the design of this research also seeks to estimate incremental visitation for Destination and Regional consumers.

This study uses a bottom-up approach to calculating the campaign's overall return on investment. In short, the method described here is applied to both of the geographic areas studied (Baltimore-Washington DC DMA and other areas in a 400 mile radius of Alexandria) and the program's total is the sum of these two components.

Figure 4.5 (following) shows this study's estimates of incremental visitor volume and spending. In total, we estimate that the advertising campaign generated 593 thousand incremental trips, 37.9 percent of which were taken by visitors who stayed overnight inside the Alexandria.

Figure 4.5: Incremental Visitation & Spending in Alexandria

	Total
Total Households	38,189,626
Households traveling	83%
Qualified households	31,780,517
Percent aware of ads	23.4%

Households aware of ads	8,937,203
Incremental travel	6.6%
Incremental trips	593,001
Total spending per travel party	\$297.83
TOTAL	\$176,611,889

Incremental Tax Revenue

Visitor spending generates taxes. Alexandria has several taxes which impact travelers, including a transient occupancy tax (hotel tax), retail sales taxes and other taxes.

The survey questionnaire asks respondents for all the data needed to make detailed estimates of visitor spending in Alexandria generated by the advertising campaign. In the survey, visitors to Alexandria report the number of days they spent in Alexandria and how much they spent per day for a variety of spending categories. The categories of spending reported include lodging, restaurants, retail, entertainment/sightseeing, gas/parking/transportation and other spending. To derive tax revenue estimates, total visitor spending for each category is multiplied by an appropriate tax rate.

We estimate that total incremental visitor spending in Alexandria generated by the campaign was \$176.6 million. This is the sum taxes generated for each spending type outlined above. For each spending category, tax rates provided by the CVA were applied to estimated incremental spending to calculate tax revenues generated. For example, the model estimates \$26.9 million in pre-tax room revenue for Alexandria hotels. Using an average 7.2% transient occupancy tax rate (based on 6.5% rate + \$1/room with an average room rate of \$137), we estimate that \$2.1 million in incremental taxes were collected as a result of the advertising campaign. Similarly, \$62.9 million in incremental spending took place in restaurants. Applying a 5.0% restaurant tax to this total yields an estimate of \$3.1 million in tax generation. A 1.0% sales tax rate is applied to the \$28.6 million in incremental spending for retail purchases (\$287K in tax revenue), \$25.4 million in entertainment and sightseeing expenditures (\$254K in tax revenue), \$24.6 million gas, parking and transportation spending (\$246K in tax revenue) and \$5.3 million in other incremental visitor spending that took place in Alexandria (\$53K in tax revenue). The sum of tax revenue generated for all spending types equals the total tax generated of \$6.1 million. See Figure 4.6 following.

Figure 4.6: Incremental Tax Revenue Generated for Alexandria

	Total
Lodging	\$2,118,677.40
Restaurants	\$3,146,225.21
Retail	\$286,963.82
Entertainment & Sightseeing	\$254,274.68
Gas, parking & transportation	\$246,009.10
Other	\$53,721.58
	\$6,105,871.80

Figure 4.7 Return on Investment Summary

With a total campaign spend of \$1.0 million, we calculate an overall ROI of the campaign to Alexandria of \$171 per dollar invested. The tax ROI is \$6 returned to the city coffers for every dollar invested in the campaign.

	Total
Incremental visitor spending	\$176,611,889
Incremental taxes generated (for Alexandria)	\$6,105,872
Alexandria CVA investment	\$1,035,144
Return on Investment (Incremental visitor spending/investment)	\$171
Tax ROI (Incremental tax revenues/investment)	\$6

Detailed Survey Results

In this section, we present the findings of the survey's base questions in the order they were asked. These are the non-demographic questions, or those related to respondent opinions and behaviors. A brief written analysis is included for each chart.

Note: Survey respondents were screened for Alexandria, VA residence. Data presented is based on potential “visitors to Alexandria,” defined as those living outside the city.

The survey targeted adults residing in the Baltimore-Washington, DC DMA, as well as other adults residing within a 400-mile radius of Alexandria, VA. The tables on the pages that follow refer to the first group—those within the Baltimore-Washington, DC DMA—as “Regional.” The latter group—those residing within a 400-mile radius of Alexandria OUTSIDE the Baltimore-Washington, DC DMA—is referred to as “Destination.”

Please also note that data shown on the tables is weighted, while the data in the main charts is not.

Top-of-Mind Eastern U.S. Destinations (Open-Ended)

To understand Alexandria, VA’s competitive landscape, survey respondents were asked to assume they wanted to take a getaway trip in the Eastern U.S. to a destination that is “historic, picturesque and romantic, while offering contemporary dining, unique shopping, arts and culture nearby a major metropolitan area” and then list the destinations that first came to mind. Travel thinking and trip consideration are dominated by the major urban destinations in the region—particularly New York City (38.1%), but also Boston (25.7%), Washington DC (22.2%) and Philadelphia (18.0%). Outside these core cities, Alexandria is exceeded in top-of-mind awareness by two other Virginia destinations—Williamsburg (12.0%) and Virginia Beach (6.9%)—as well as Charleston, SC (10.9%) and Baltimore, MD (6.8%). In total, 1.1 percent of survey respondents wrote in Alexandria, VA as one of the top Eastern U.S. destinations that they would think of for this type of experience, emphasizing the need for marketing to better Alexandria’s position in the typical travelers’ consideration set.

Figure 5.1: Assume that you want to take a getaway trip in the Eastern U.S. You are considering a destination that is historic, picturesque and romantic, while offering contemporary dining, unique shopping, arts and culture nearby a major metropolitan area. Which destinations in the Eastern U.S. first come to mind as offering this experience? (List up to four)—TOP FIFTEEN

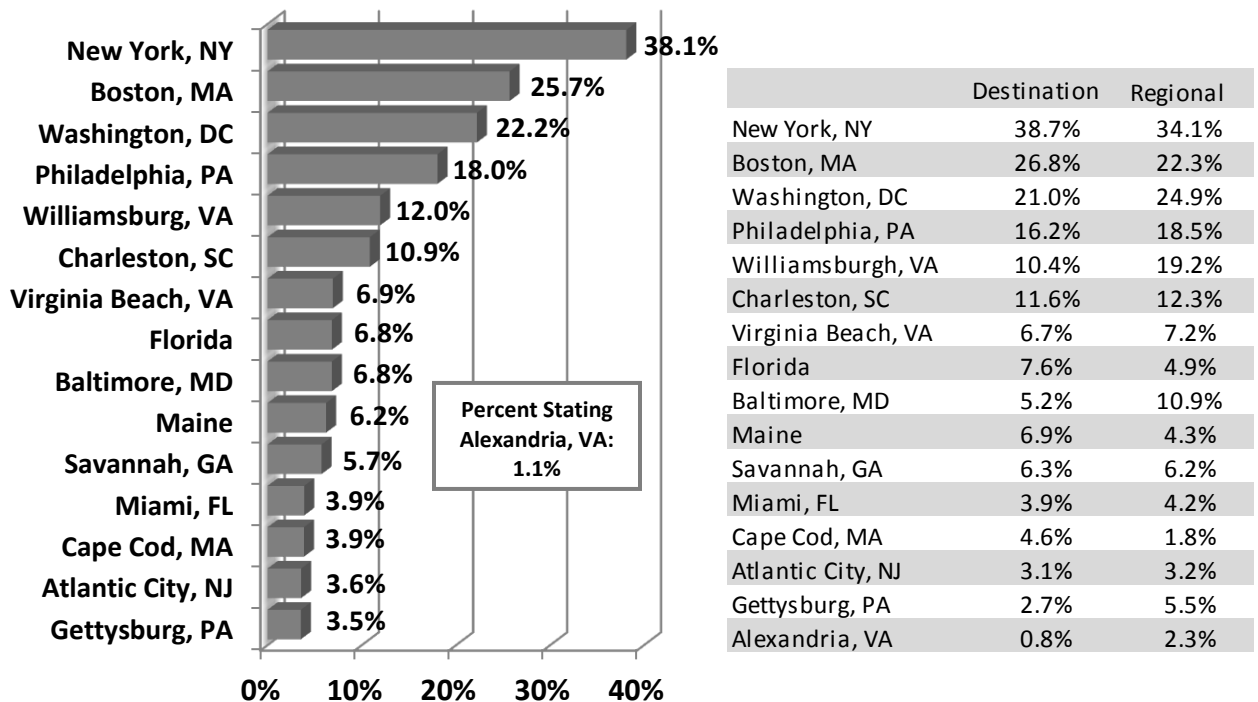


FIGURE 5.1 - Question 4: Assume that you want to take a getaway trip in the Eastern U.S. You are considering a destination that is historic, picturesque and romantic, while offering contemporary dining, unique shopping, arts and culture nearby a major metropolitan area. Which destinations in the Eastern U.S. first come to mind as offering this experience? (List up to four) Base: All survey respondents . 4,808 completed surveys.

Magazines Read in the Past Twelve Months

Survey respondents were shown a list of the magazines the campaign advertising ran in and were asked to select those which they recalled reading or looking through in the past year. Figure 5.2 (below) shows the percent of respondents who reported reading or looking through these magazines. Travel, food and lifestyle magazines continue to be popular amongst residents of the area of study. Nearly 78 percent reported having read at least one of the magazines on the campaign media schedule. 31.1 percent reported reading *Good Housekeeping* while approximately one in five reported reading *Women’s Day*, *Food & Wine*, *Travel + Leisure* and/or *Food Network Magazine*.

Figure 5.2: Which of these magazines do you recall reading or looking through at least once in the past 12 months? (Select all that apply)

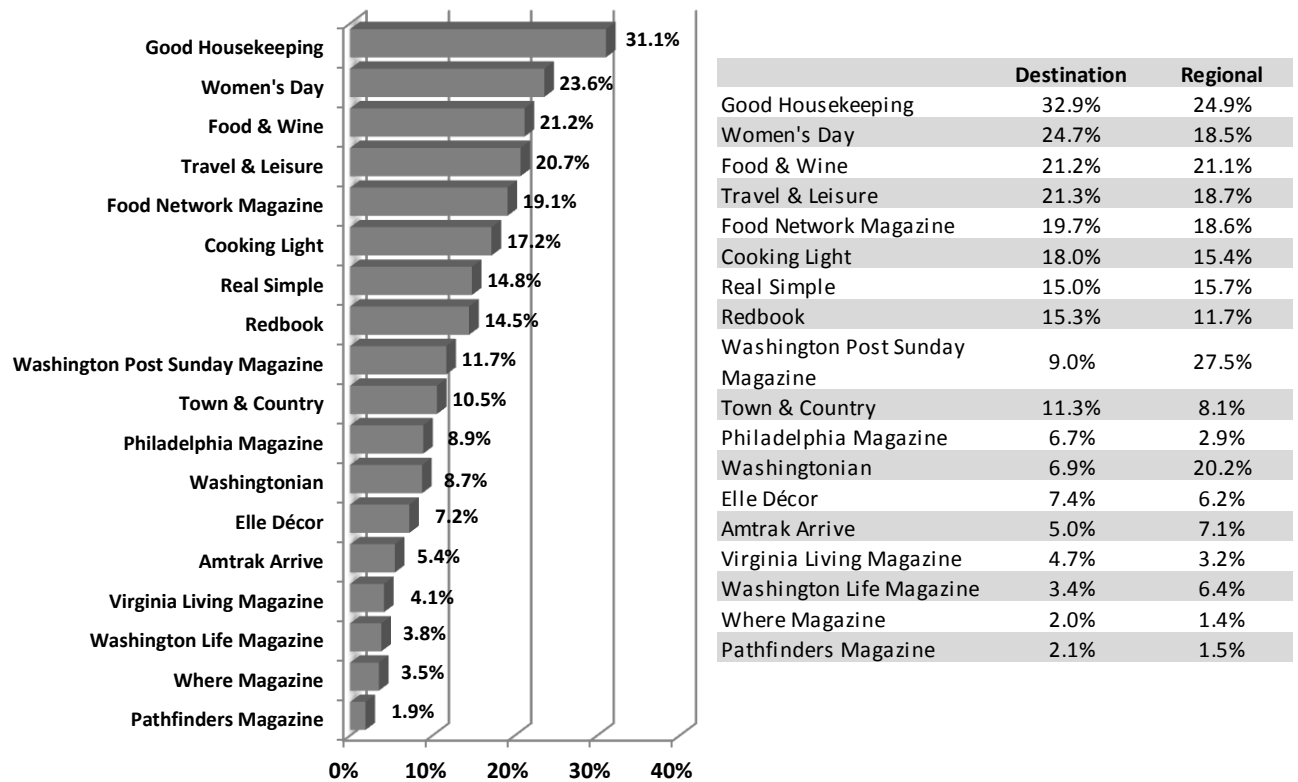


FIGURE 5.2 - Question 5: Which of these magazines do you recall reading or looking through at least once in the past 12 months? (Select all that apply) Base: All survey respondents. 4,808 completed surveys.

Newspapers Read in the Past Twelve Months

As with the magazines, respondents were then shown the newspapers used in the campaigns and asked to identify those they had read or looked through at least once in the past 12 months. Given these media’s specific geographic focus, a smaller proportion (45.0%) of survey respondents had read at least one of the newspapers on the campaign's media schedule in the past year. With its status and broad focus, *The Washington Post* had the greatest percentage of respondents say they had read or looked through it in the last year (34.2%).

Figure 5.3: Which of the printed versions of these newspapers and news weeklies do you recall reading or looking through at least once in the past 12 months? (Select all that apply)

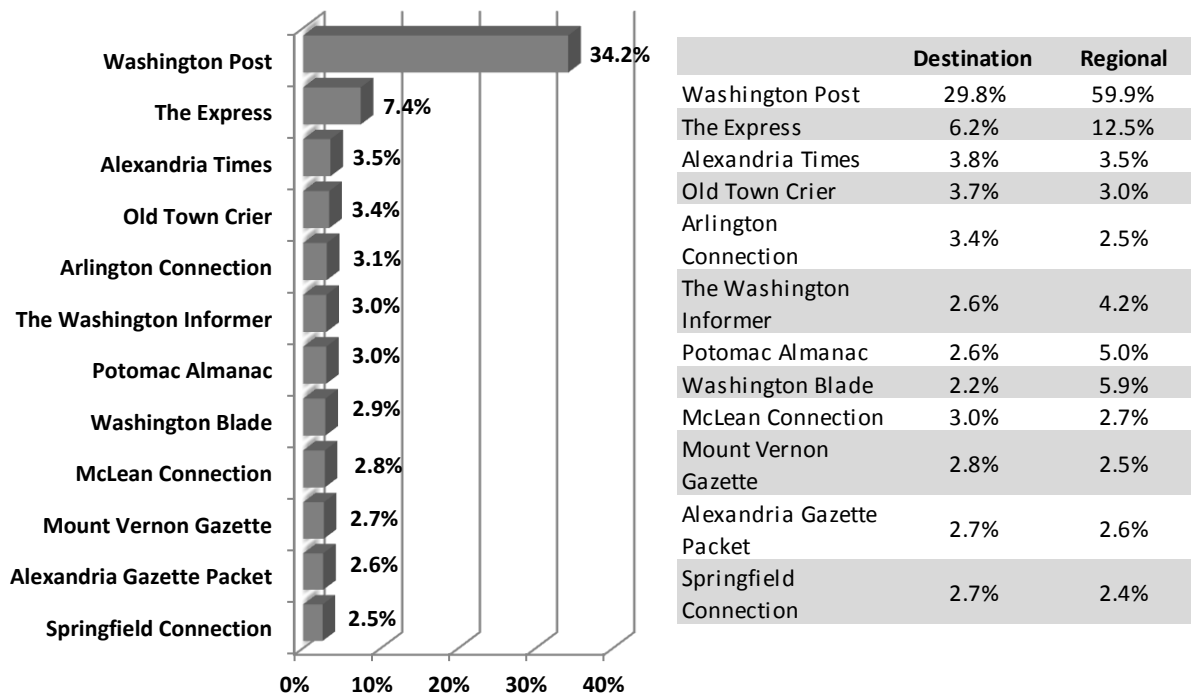


FIGURE 5.3 - Question 6: Which of the printed versions of these newspapers and news weeklies do you recall reading or looking through at least once in the past 12 months? (Select all that apply) Base: All survey respondents. 4,808 completed surveys.

Websites Visited in the Past Twelve Months

Survey respondents were also shown a list of websites and asked which ones they visited at least once in the past 12 months. Google and Facebook usage was reported by approximately three quarters of respondents (76.3% and 71.8% respectively). Major travel websites were the next most utilized of the online media tested, with 37.0 percent of respondents reporting visiting Expedia (37.0%) and 35.7 percent using TripAdvisor. About 16 percent used WashingtonPost.com and nearly 11 percent had visited Smithsonian.com. Amongst the official destination websites, 6.0 percent had used Virginia.org and 3.8 percent had used Washington.org.

Figure 5.4: Which of these websites, web services and/or apps do you recall using at least once in the past 12 months? (Select all that apply)

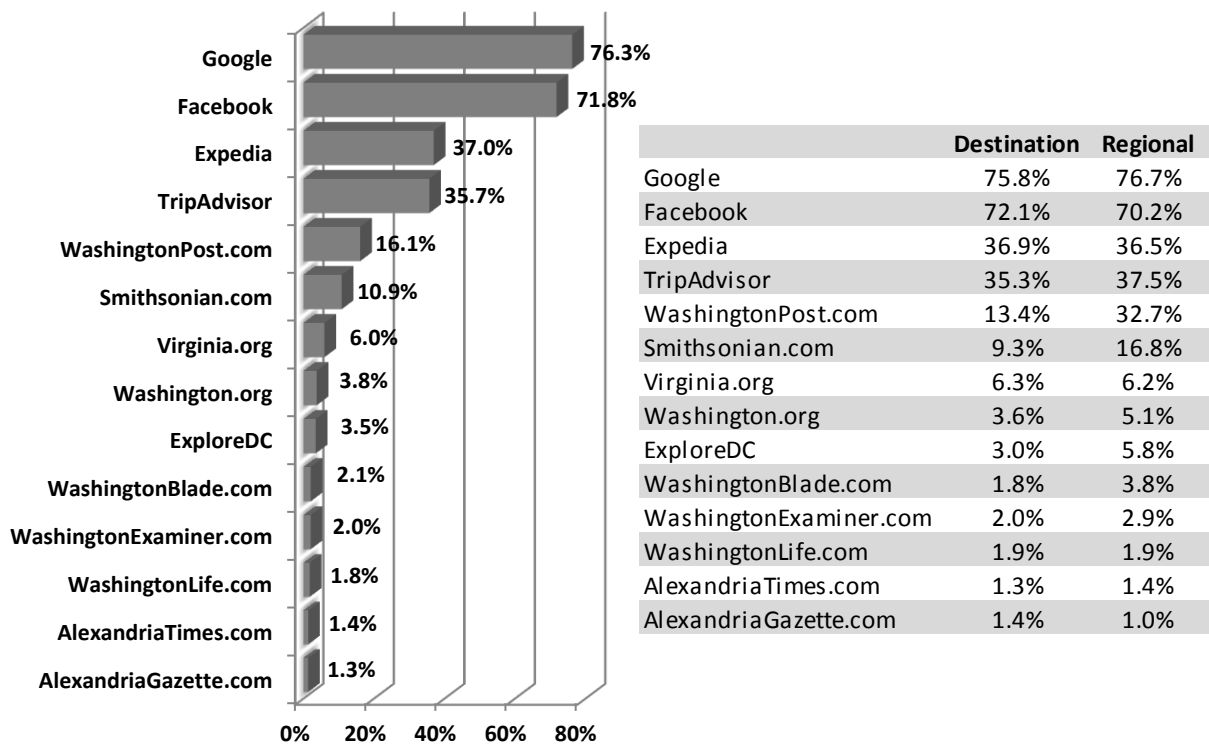


FIGURE 5.4 - Question 7: Which of these websites, web services and/or apps do you recall using at least once in the past 12 months? (Select all that apply) Base: All survey respondents. 4,808 completed surveys.

Leisure Trips Taken in the Past 12 Months

The respondents surveyed took an average of 2.9 leisure trips in the past year. While 16.8 percent took no leisure trips, and 18.2 percent took only one trip, a majority of adults living in the area of study traveled multiple times for leisure in the past year (64.9%). This represents an opportune environment to market Alexandria as an option for one or more of these trips.

Figure 5.5: In the past 12 months, how many leisure trips (vacations, weekend getaways, and trips for other personal reasons) have you taken? Please enter a numeric value below.

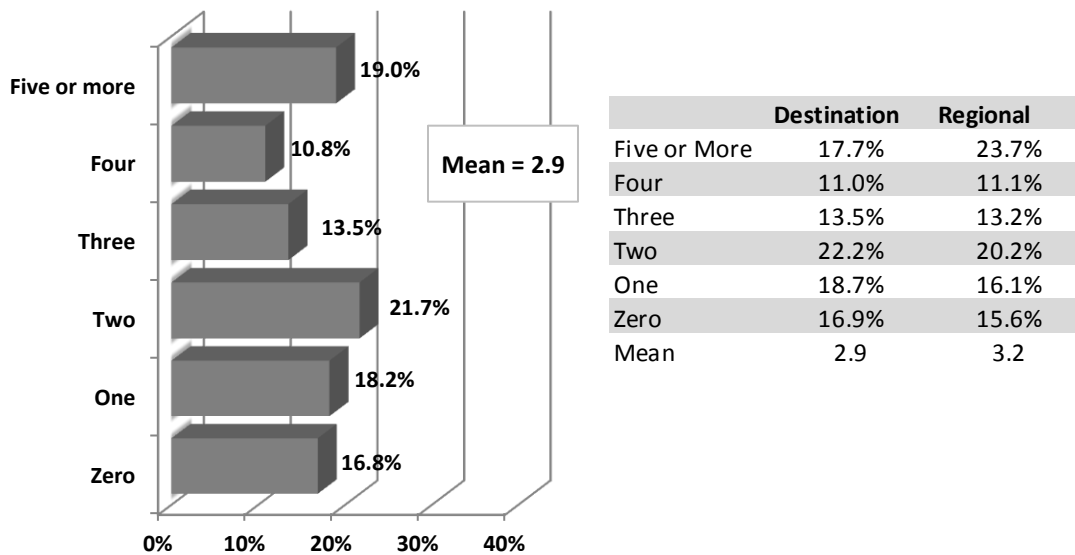


FIGURE 5.5 - Question 8: In the past 12 months, how many leisure trips (vacations, weekend getaways, and trips for other personal reasons) have you taken? Please enter a numeric value below. Base: All survey respondents. 4,736 completed surveys.

Cities Visited On Leisure Trips in the Past 12 Months

Those survey respondents who reported having traveled at least once for leisure in the past year were then presented a list of regional cities and asked which they had visited for leisure in the previous 12 months. In total, 13.0 percent have visited Alexandria (13.0%) in the last year. Travel behavior, like travel thinking, is dominated by the major cities. New York was the top regional destination, with 31.7 percent of residents in the area of study having visited the city in the past year. Washington, DC and Philadelphia followed with 28.7 percent and 25.5 percent having traveled to these cities in the previous 12 months.

Figure 5.6: In the past 12 months, which of these cities did you visit for leisure or other personal reasons? (Consider both overnight and day visits. Select all that apply)

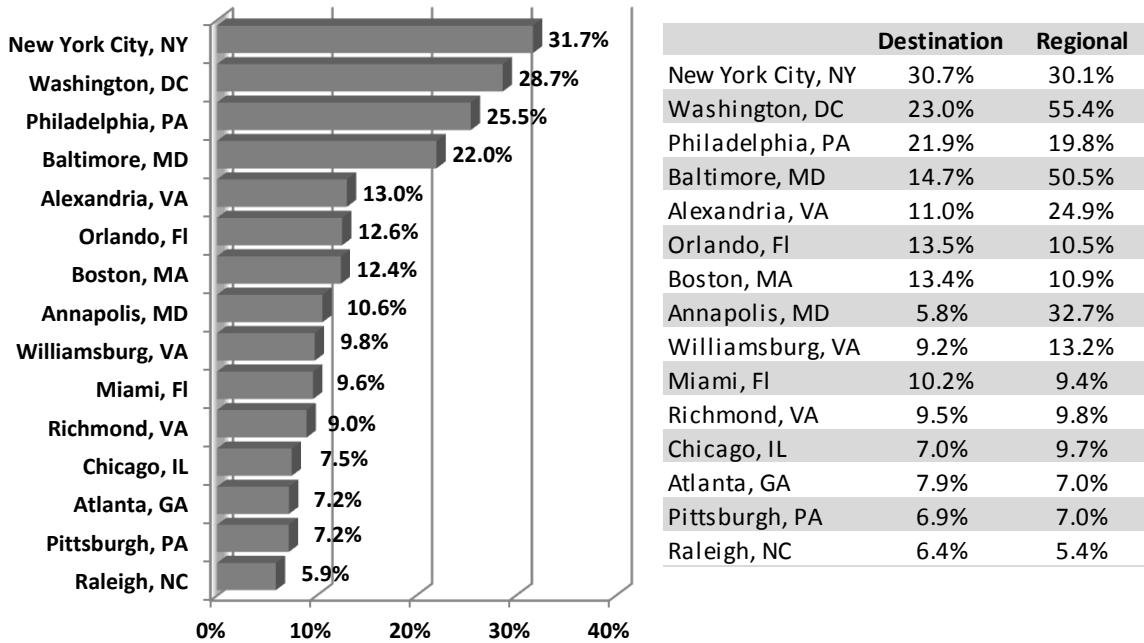


FIGURE 5.6 - Question 9: In the past 12 months, which of these cities did you visit for leisure or personal reasons? (Consider both overnight and day visits. Select all that apply) Base: Survey respondents who took at least one leisure trip in the past 12 months. 4,013 completed surveys.

Leisure Visits to Alexandria in the Past 12 Months

Those that reported visiting Alexandria for leisure in the past year were asked how many such trips to the city they made. These Alexandria visitors took an average of 3.3 trips to the city. While the majority of survey respondents said they took just one leisure trip to Alexandria (42.4%), over 50 percent took multiple trips to the city for leisure.

Figure 5.7: You said that you visited Alexandria, VA for leisure or other personal reasons in the past 12 months. How many trips for leisure reasons did you make to Alexandria, VA in the past 12 months? (Please enter the number below.)

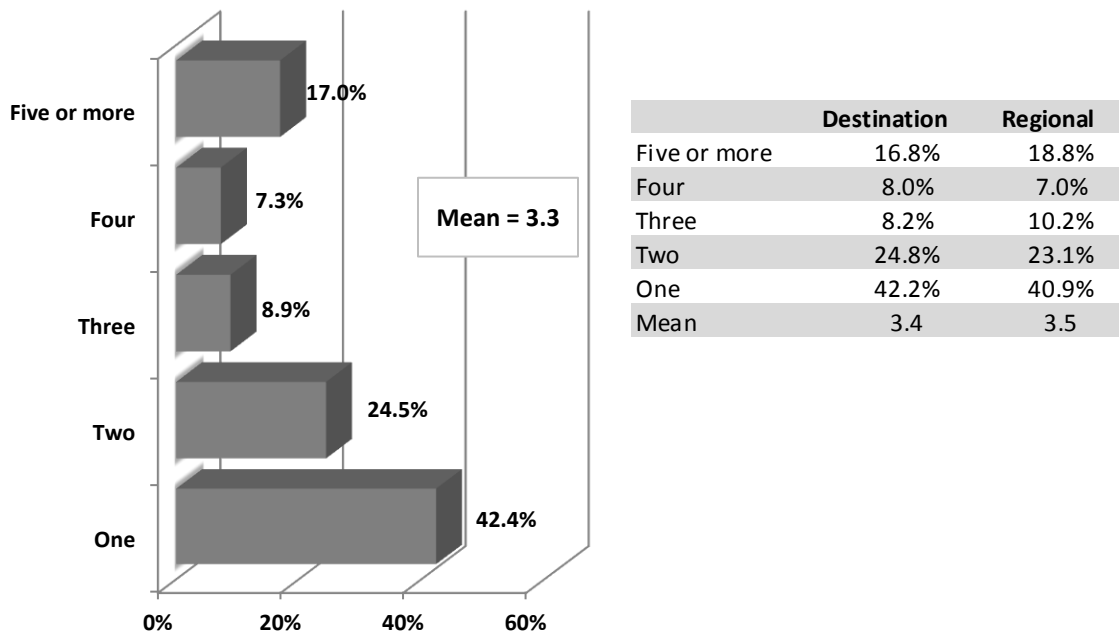


FIGURE 5.7 - Question 10: You said that you visited Alexandria, VA for leisure or personal reasons in the past 12 months. How many trips for leisure reasons did you make to Alexandria, VA in the past 12 months? (Please enter the number below.) Base: Survey respondents who visited Alexandria in the past 12 months. 517 completed surveys.

Month of Alexandria Visit

Respondents who took at least one leisure trip to Alexandria in the past year were asked in which month(s) they visited. Visitor traffic to Alexandria from the region and the surrounding 400-mile radius appears to be at its lowest point in January (14.1%) and February (14.5%), and reach its highest point in the late spring-early summer months of May and June (25.0% and 25.3%, respectively).

Figure 5.8: In which month(s) did you visit Alexandria, VA on a leisure trip(s)? (Select all that apply.)

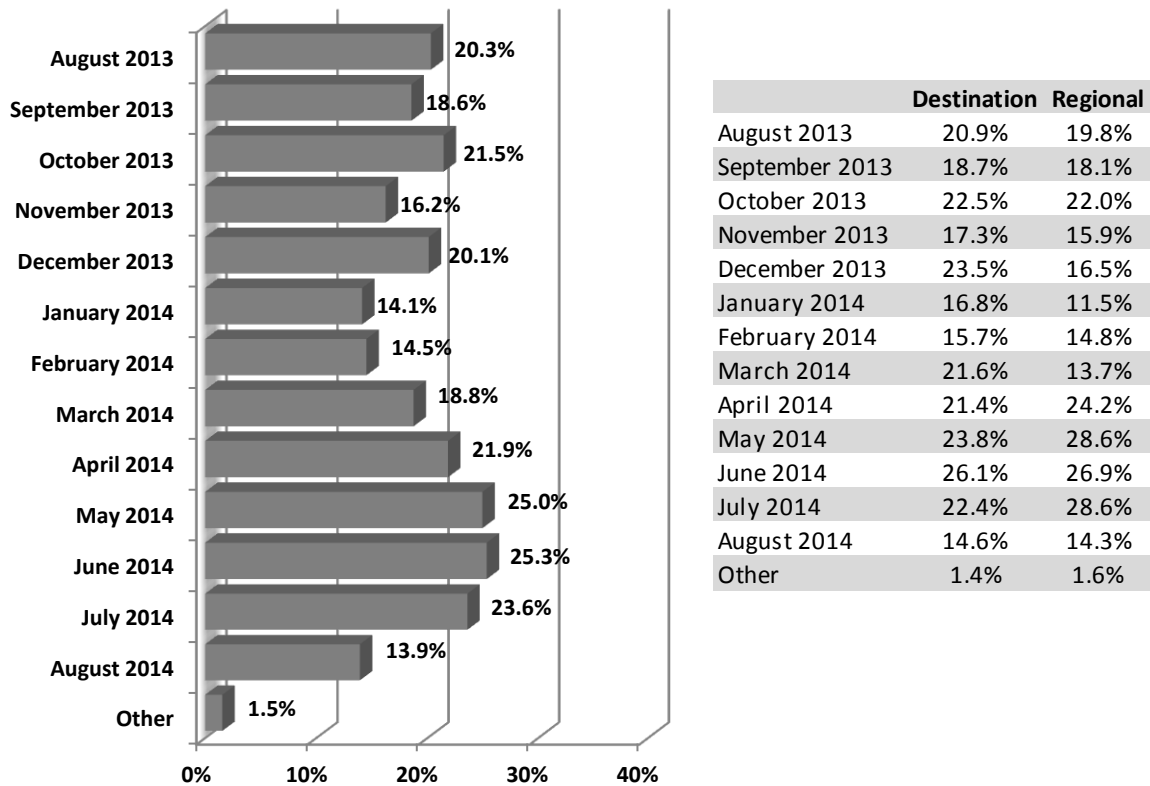


FIGURE 5.8 - Question 11: In which month(s) did you visit the city of Alexandria, VA on a leisure trip(s)? (Select all that apply.) Base: Respondents who visited Alexandria. 517 completed surveys.

Primary Reason for Visiting Alexandria

Day trips and trips to visit local friends and relatives (VFR) are significant tourism drivers to Alexandria. Respondents visiting Alexandria in the past year were asked the primary purpose of their most recent leisure trip to the city. The most common responses to this question were "day trips" (38.6%) and "visit friends or family" (25.4%). Approximately one in five respondents characterized their visit to Alexandria as a "vacation." This demonstrates the opportunity the Alexandria CVA has to motivate longer stays and visitors to stay in hotels through its marketing.

Figure 5.10: Which best describes your reason for visiting Alexandria, VA on this most recent leisure trip?

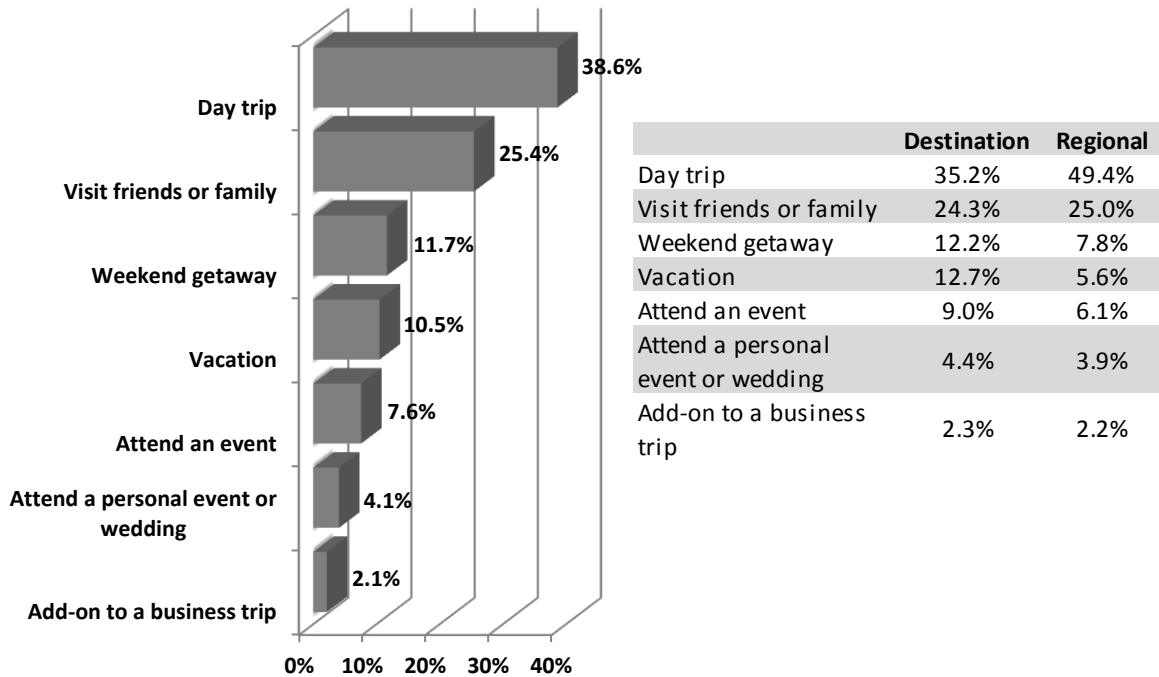


FIGURE 5.10 - Question 12: Which best describes your reason for visiting Alexandria, VA on this most recent leisure trip? Base: Respondents who visited Alexandria, VA. 515 completed surveys.

Travel Companion for Trip to Alexandria

Over half of Alexandria visitors surveyed traveled to the city with their spouse, partner or significant other (56.1%). While Alexandria is primarily an adult destination, the city does however, attract an important share of the region’s family travel market. 21.9 percent of visitors had at least one child in their party.

Figure 5.11: Who were you traveling with on this trip to Alexandria, VA? (Select all that apply)

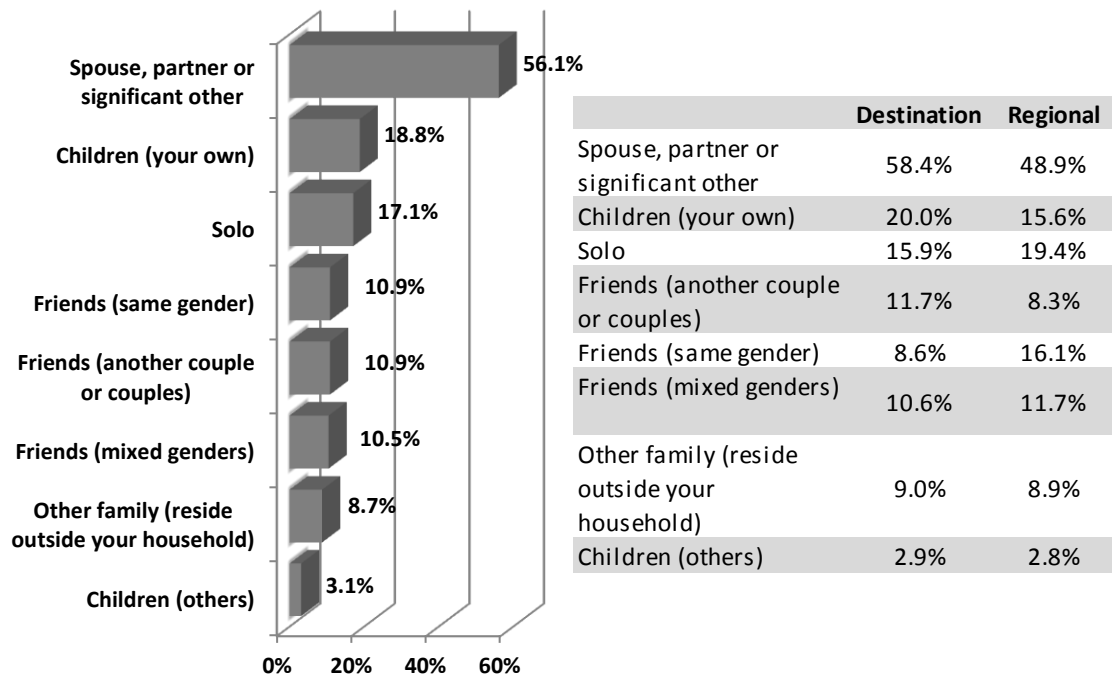


FIGURE 5.11 - Question 13: Who were you traveling with on this trip to Alexandria, VA? Base: Respondents who visited Alexandria, VA. 556 completed surveys.

Total Trip Length—Days

Survey respondents who visited Alexandria were asked a series of questions about their total trip length and the amount of that time spent specifically in Alexandria. The typical Alexandria visitor from the area of study reported an average total trip length of 2.5 days, during which they visited Alexandria, VA. As this group generally does not have to travel extensive distances to visit Alexandria and neighboring areas—and the reported purpose of many of these trips were for day trips, to visit friends and family, or weekend getaways —this may warrant shorter trips.

Figure 5.12: How many total days and nights was this trip in which you visited Alexandria, VA? (DAYS)

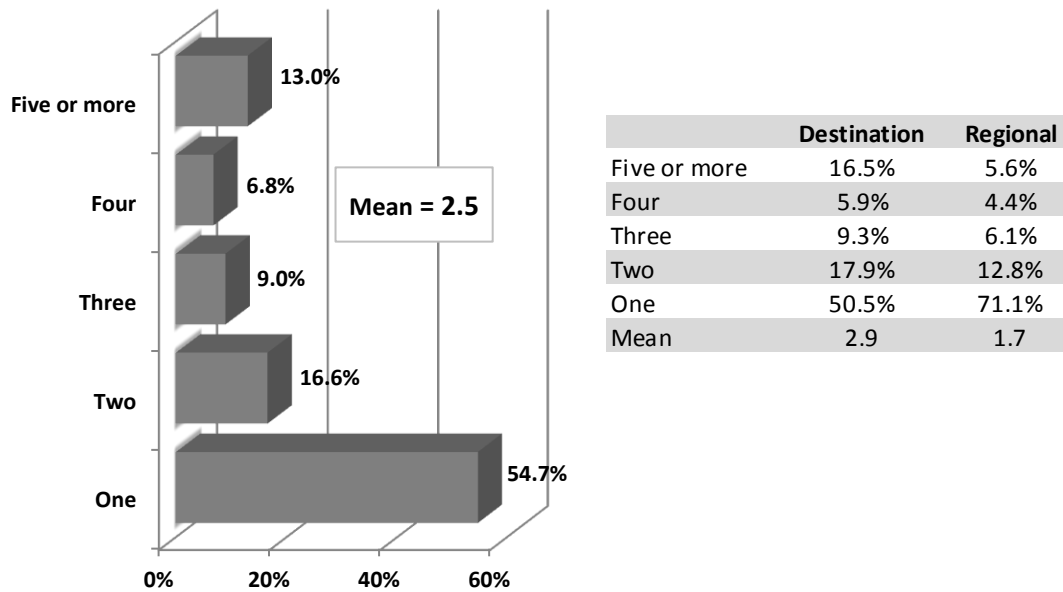


FIGURE 5.12 - Question 14: How many total days and nights was this trip in which you visited Alexandria, VA?
Base: Respondents who visited Alexandria, VA. 501 completed surveys.

Total Trip Length—Nights

The typical Alexandria visitor surveyed reported an average total trip length of 1.5 nights. Given the high proportion of day-trips reported, over half of visitors (54.2%) did not stay overnight outside their home during their trip in which they visited Alexandria.

Figure 5.13: How many total days and nights was this trip in which you visited Alexandria, VA? (NIGHTS)

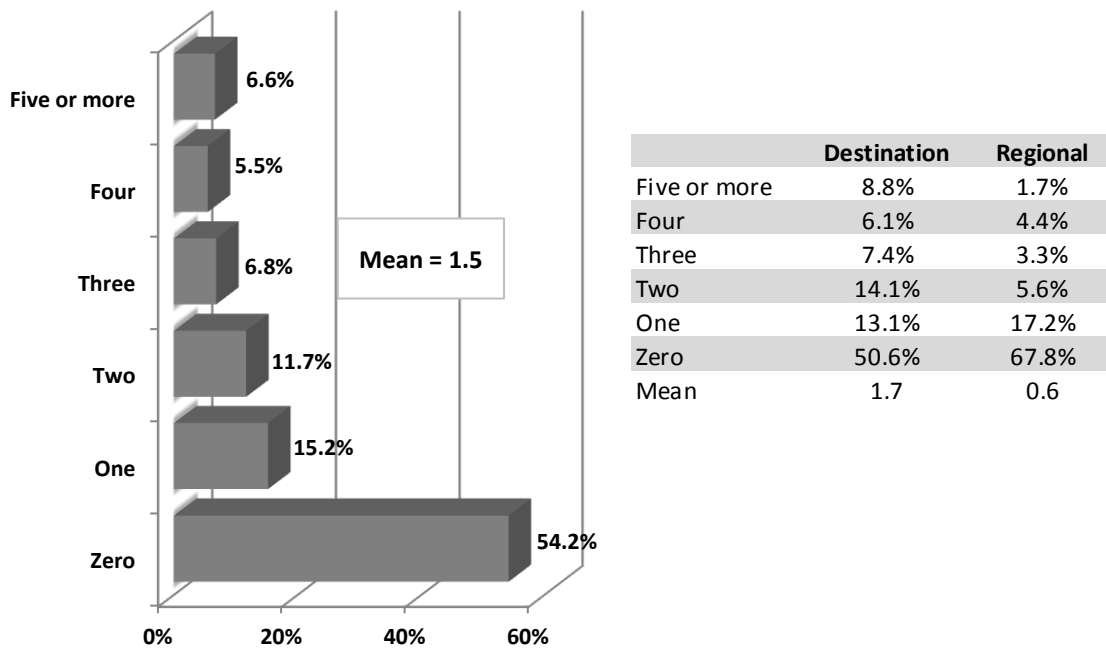


FIGURE 5.13 - Question 14: How many total days and nights was this trip in which you visited Alexandria, VA?
Base: Respondents who visited Alexandria, VA. 513 completed surveys.

Total Trip Days Specifically Spent in Alexandria

The findings suggest that those who travel to Alexandria from the surrounding 400-mile area for leisure are most likely visiting the city as their primary trip destination. When asked how many of their total trip days they specifically spent in Alexandria, they reported an average of 2.2 days within the city out of a total trip length of 2.5 days.

Figure 5.14: How many total days and nights did you specifically spend in Alexandria, VA on this trip? (DAYS)

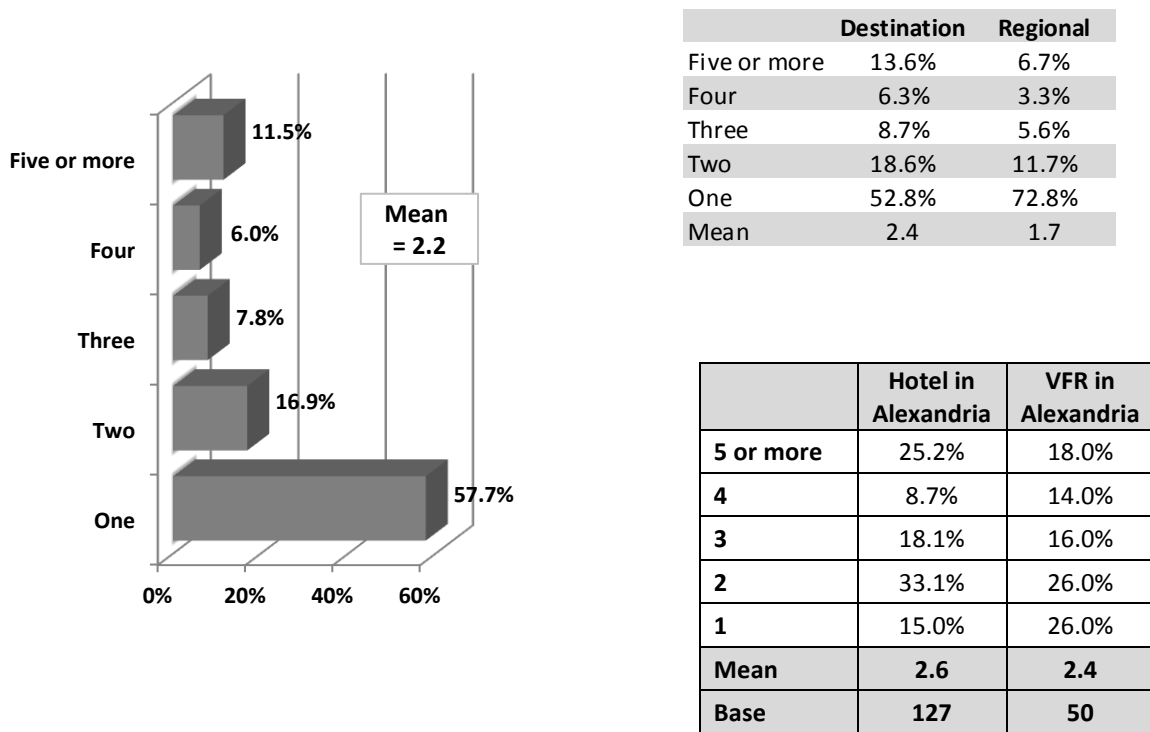
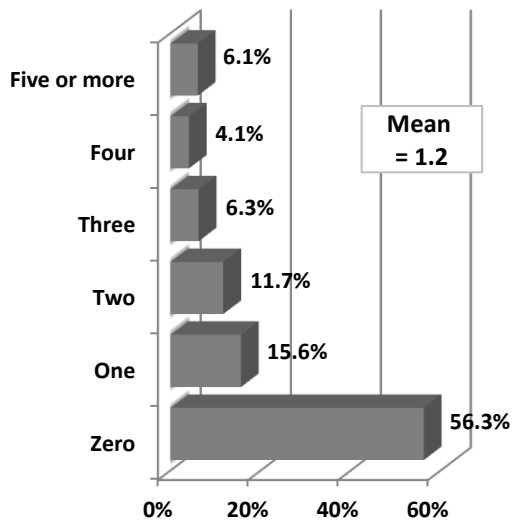


FIGURE 5.14 - Question 15: How many total days and nights did you specifically spend in Alexandria, VA on this trip? Base: Respondents who visited Alexandria, VA. 497 completed surveys.

Total Trip Nights Specifically Spent in Alexandria

Further highlighting Alexandria as the prime trip focus while demonstrating the need to motivate longer stays, the average number of trip nights spent in Alexandria was 1.2 nights, out of a total trip length of 1.5 nights. 56.3 percent of visitors did not stay overnight in Alexandria during their trip.

Figure 5.15: How many total days and nights did you specifically spend in Alexandria, VA on this trip? (NIGHTS)



	Destination	Regional
Five or more	7.7%	2.2%
Four	4.5%	3.3%
Three	7.2%	2.8%
Two	14.4%	5.0%
One	14.0%	17.2%
Zero	52.1%	69.4%
Mean	1.4	0.6

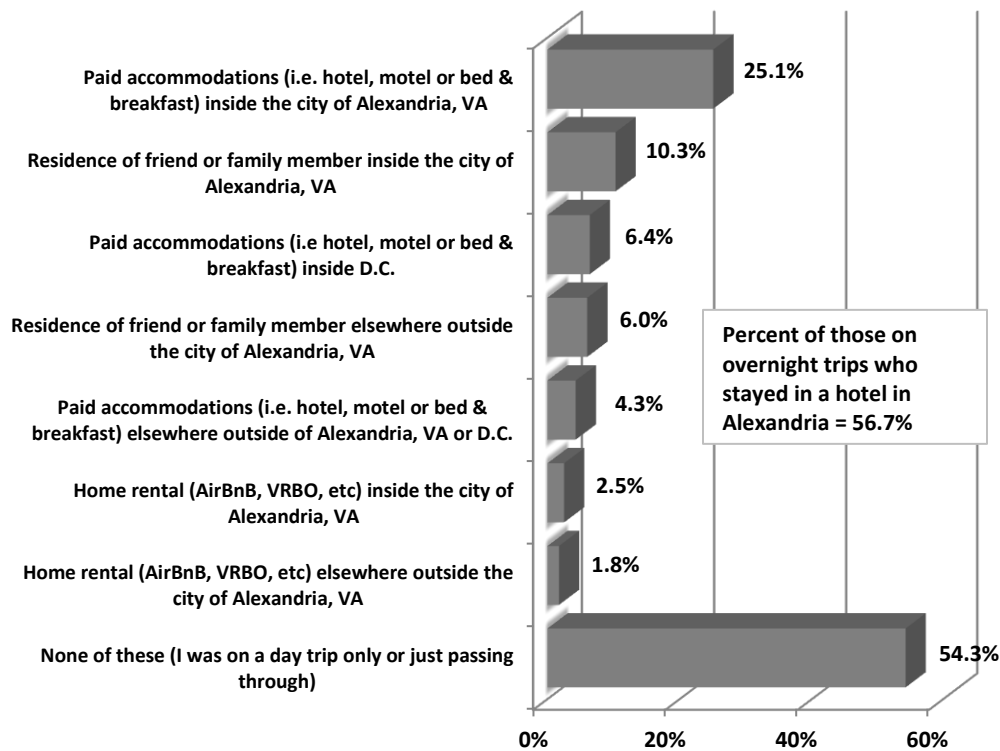
	Hotel in Alexandria	VFR in Alexandria
5 or more	16.3%	9.6%
4	11.6%	9.6%
3	16.3%	13.5%
2	28.7%	15.4%
1	25.6%	30.8%
0	1.6%	21.2%
Mean	2.4	1.7
Base	127	50

FIGURE 5.15 - Question 15: How many total days and nights did you specifically spend in Alexandria, VA on this trip? Base: Respondents who visited Alexandria, VA. 512 completed surveys.

Place of Stay—All Alexandria Visitors

As a significant number of Alexandria visitors surveyed came to the city for a day trip on their most recent trip, the greatest proportion of visitors did not require overnight accommodations (54.3%). Nevertheless, one quarter (25.1%) of all these Alexandria visitors stayed in commercial lodging inside the city. With 25.4 percent reporting their trip purpose as visiting friends and family, in total, 16.3 percent stayed overnight at the residence of a friend or family member.

Figure 5.16: During this trip in which you visited Alexandria, VA, in what type(s) of lodging did you stay? (Select all that apply)



	Destination	Regional
Paid accommodations inside the city of Alexandria, VA	29.3%	15.0%
Residence of friend or family member inside the city of Alexandria, VA	10.0%	10.0%
Paid accommodations inside the District of Columbia	9.2%	1.1%
Residence of friend or family member elsewhere outside the city of Alexandria, VA	5.8%	4.4%
Paid accommodations elsewhere outside of Alexandria, VA or the District of Columbia	4.8%	1.1%
Home rental inside the city of Alexandria, VA	2.9%	1.1%
Home rental elsewhere outside the city of Alexandria, VA	2.4%	0.6%
None of these (I was on a day trip only or just passing through)	49.4%	69.4%

FIGURE 5.16 - Question 16: During this trip in which you visited Alexandria, VA, in what type(s) of lodging did you stay? (Select all that apply) Base: Respondents who visited Alexandria, VA. 514 completed surveys.

Alexandria Visitor Spending Per Trip

Alexandria visitors were asked to report their trip spending across several categories. Figure 5.15 below shows the average spending for all visitors, including day-trippers. Visitors spent an average of \$297.83 in the city of Alexandria during their trip. By far, the largest proportion of this spending was on restaurants & dining (\$106.11). Other visitor spending was spread fairly evenly across lodging (\$49.90), retail (\$48.39), entertainment & sightseeing (\$42.88) and gas, parking & transportation (\$41.49).

Figure 5.17: Approximately how much IN TOTAL did you spend on the following while in the city of Alexandria, VA? (Please do not include any spending outside Alexandria, VA, e.g., any expenses incurred in Washington, DC.) –AVERAGE ALL VISITORS

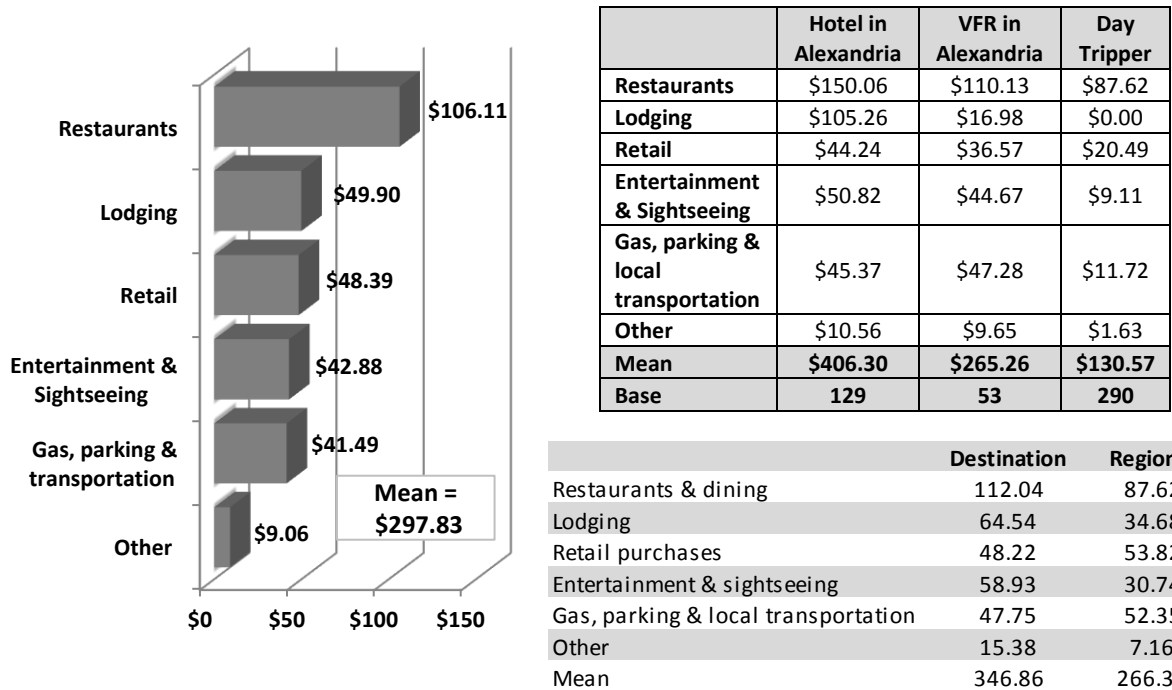


FIGURE 5.17 - Question 17: Approximately how much IN TOTAL did you spend on the following while in the city of Alexandria, VA? (Please do not include any spending outside Alexandria, VA, e.g., any expenses incurred in Washington, DC.) Base: Respondents who visited Alexandria, VA. 515 completed surveys.

Number of People Covered by Trip Spending

Alexandria visitors were then asked how many people their total spending in the city covered. Reported visitor spending covered 2.4 persons on average, making the mean per-person spending represented by these Alexandria visitors \$125.57.

Figure 5.18: How many people did this spending cover (including yourself)?

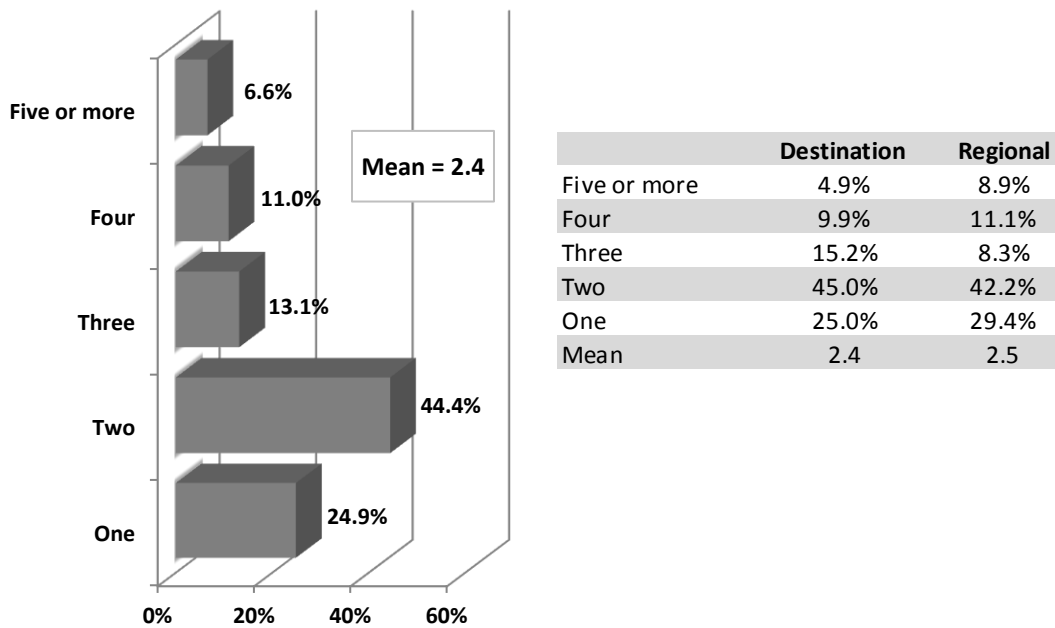


FIGURE 5.18 – Question 18: How many people did this spending cover (including yourself)? Base: Respondents who visited Alexandria, VA. 502 completed surveys.

Number of People in Travel Party

The reported average Alexandria travel party amongst this group of visitors consisted of 3.3 people, the largest proportion of which were adults over the age of 18 (2.81 adult party members on average).

Figure 5.19: How many people were in your immediate travel party (including yourself)?

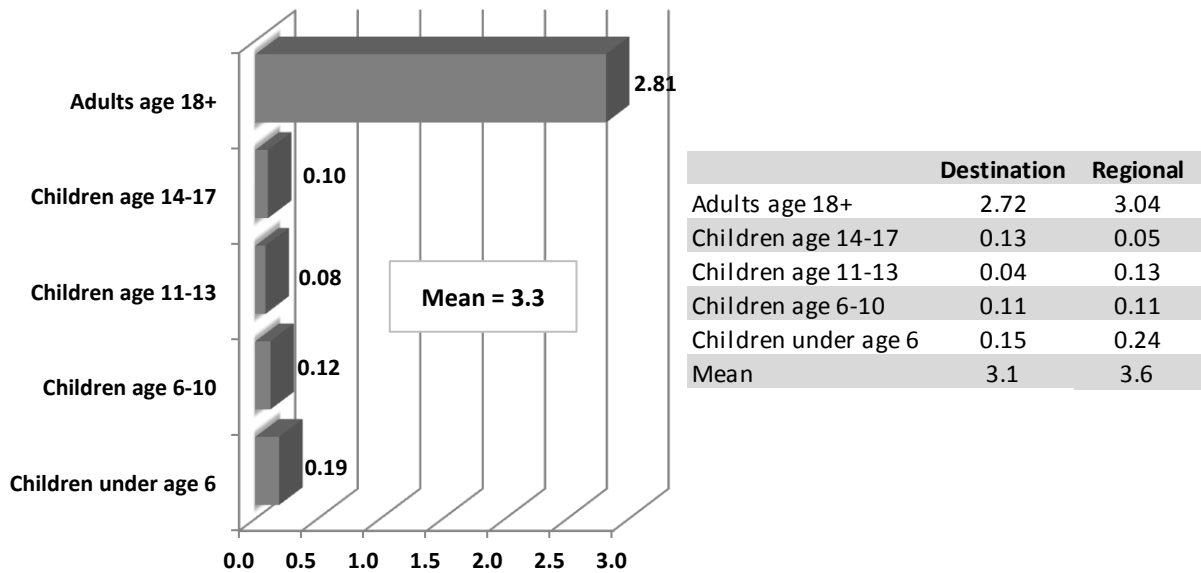


FIGURE 5.19 – Question 19: How many people were in your immediate travel party (including yourself?) Base: Respondents who visited Alexandria, VA. 515 completed surveys.

Important Destination Attributes in Decision to Visit Alexandria

For this group of travelers, Alexandria’s restaurants and food scene (46.3%) as well as its close proximity to Washington, DC (40.2%) and easy accessibility (38.7%) were the most important motivating factors in choosing Alexandria as a travel destination. Alexandria being clean and safe (33.6%) and walkable (31.4%), as well as its waterfront location (30.5%) and overall ambiance and atmosphere (30.1%) were also important to why visitors selected the city as their destination.

Figure 5.20: Which of the following were IMPORTANT to your decision to make this visit to Alexandria, VA? (Select all that apply)

	Total	Destination	Regional
Restaurants, cuisine, food scene	46.1%	46.7%	46.7%
Proximity to Washington, DC	40.1%	31.3%	51.7%
Easy to get to by car, train, plane	38.5%	33.6%	47.2%
Clean and safe	33.5%	32.9%	33.9%
Friends or family in the area	32.9%	32.9%	32.2%
Walkable and easy to get around (do not need a car)	31.3%	29.9%	34.4%
Waterfront location	30.4%	32.2%	29.4%
Overall ambiance and atmosphere	30.0%	32.6%	25.6%
Historic significance	28.8%	32.6%	20.6%
Well-preserved 18th and 19th century architecture	22.4%	23.1%	18.3%
Alexandria is family-friendly	20.8%	20.2%	21.7%
Unique shopping opportunities	19.1%	18.9%	20.6%
Alexandria is upscale	16.9%	17.6%	15.0%
Museums and historic sites	16.3%	19.5%	10.0%
Public parks and green spaces	15.6%	15.7%	13.9%
Alexandria is a good value	15.2%	15.1%	15.0%
Art galleries/studios and other visual arts	14.8%	16.0%	12.8%
Alexandria is uncontrived and authentic	14.0%	15.0%	12.2%
Alexandria is romantic	13.6%	15.3%	10.6%
Special event and/or festival	12.3%	14.9%	9.4%
Nightlife	10.5%	12.9%	6.7%
I got a good deal on hotel, attractions or other travel components	8.6%	12.0%	1.7%
Theater and/or other performing arts/concerts/live music	5.4%	6.3%	4.4%

FIGURE 5.20 - Question 20: Which of the following were IMPORTANT to your decision to make this visit to Alexandria, VA? (Select all that apply) Base: Respondents who visited Alexandria, VA. 512 completed surveys.

Activities & Attractions During Alexandria Trip

Survey respondents who visited Alexandria were asked which activities and attractions they participated in during their trip to the city. Given the importance of the food and restaurant scene as a destination attribute, dining in restaurants was the most common visitor activity (59.8%). Shopping (42.4%), strolling King Street (41.8%) and visiting the waterfront (36.6%) were also among the most popular visitor activities.

Figure 5.21: Which of the following activities and attractions did you participate in while in Alexandria, VA on this trip? (Select all that apply)

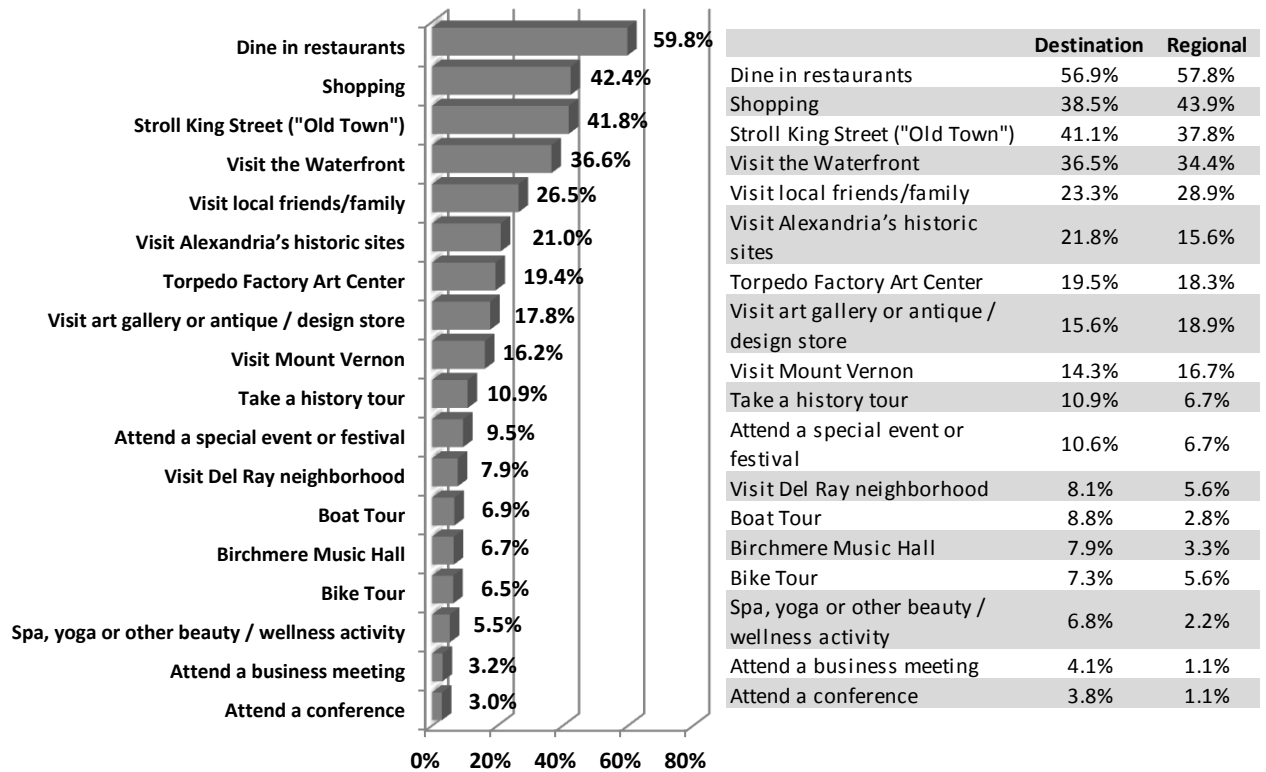


FIGURE 5.21 - Question 21: Which of the following activities and attractions did you participate in while in Alexandria, VA on this trip? (Select all the apply) Base: Respondents who visited Alexandria, VA. 495 completed surveys.

Other Destinations Visited

Alexandria visitors were asked if they spent any time in nearby destinations on their most recent Alexandria trip. Over half (54.3%) also visited Washington, DC. Just over a quarter went to Arlington, VA (26.9%), 21.8 percent visited Tysons Corner, VA and 18.5 percent spent time somewhere else in Northern Virginia during their Alexandria trip. These visitors were less likely to spend time in Maryland on their trip to Alexandria.

Figure 5.22: Which other destinations did you visit on this trip in which you visited Alexandria, VA? (Select all that apply)

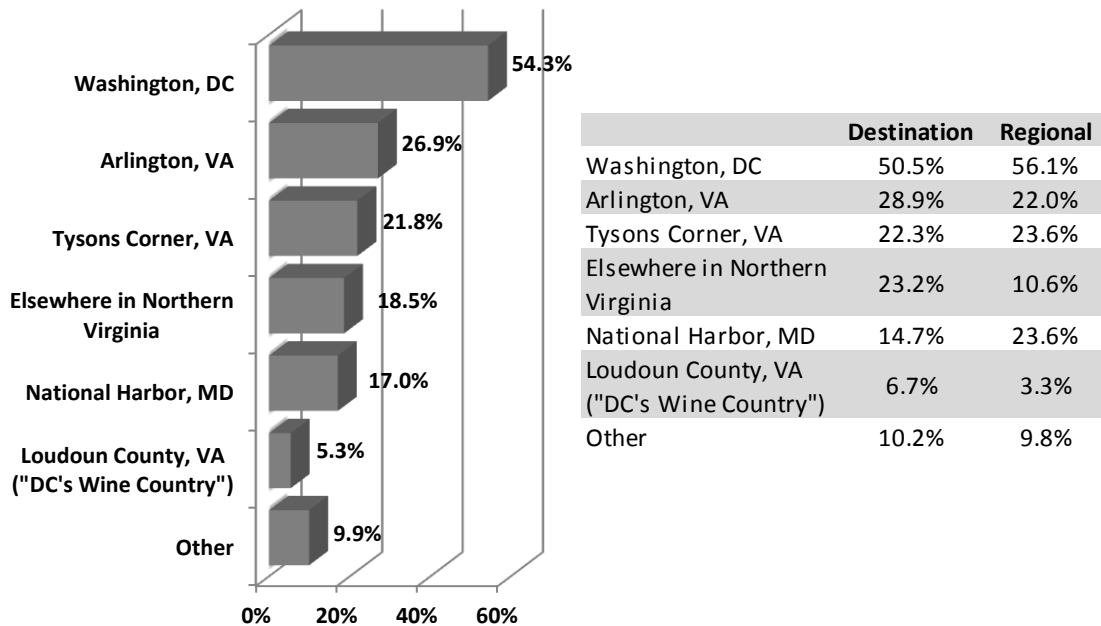


FIGURE 5.22 - Question 22: Which other destinations did you visit on this trip in which you visited Alexandria, VA? (Select all that apply). Base: Respondents who visited Alexandria, VA. 394 completed surveys.

Familiarity with Alexandria as a Leisure Destination

All survey respondents were asked how familiar they are with Alexandria as a place to visit for leisure. 46.4 percent feel they are at least “somewhat familiar” with Alexandria as a leisure destination; of these, 9.5 percent describe themselves as “very familiar.” Less than a quarter of this group feels they are “not at all familiar” with Alexandria.

Figure 5.23: How familiar are you with Alexandria, VA as a place to visit for leisure?

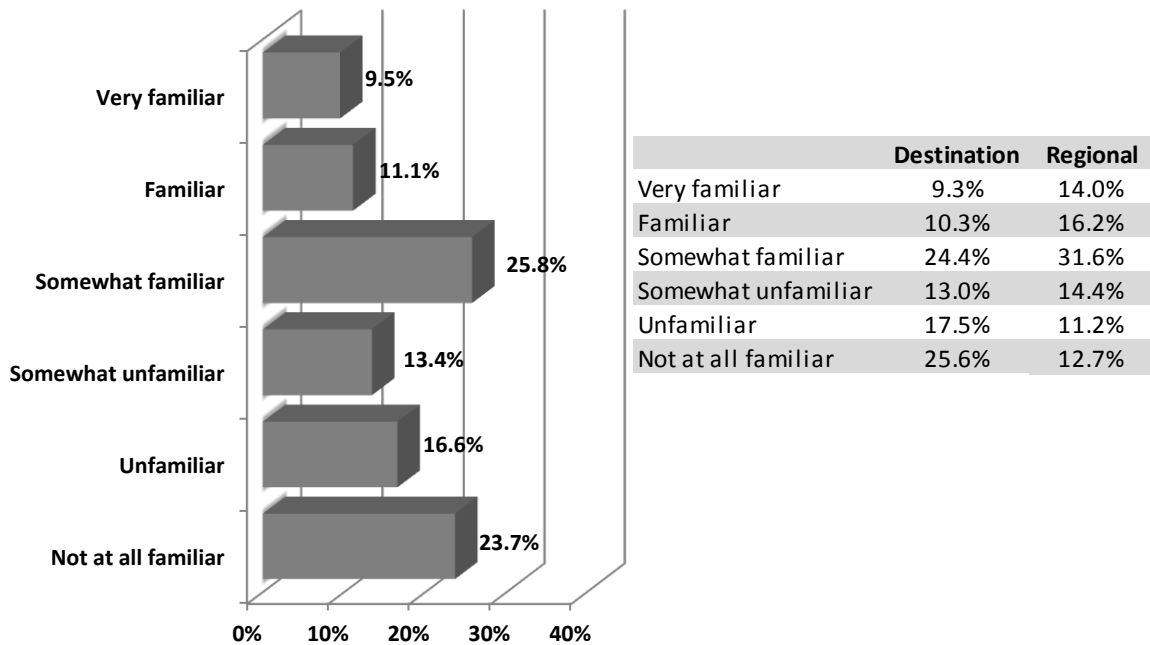


FIGURE 5.23 - Question 23: How familiar are you with Alexandria, VA as a place to visit for leisure? (Select all that apply). Base: All respondents. 4807 completed surveys.

Likelihood to Visit Alexandria in the Next 12 Months

Alexandria has a high degree of potential to attract visitors from the region and surrounding 400-mile radius for leisure in the coming year. Nearly one in ten say they “will certainly visit” (8.9%). In addition, over one third say they are at least “somewhat” or “very” likely to visit Alexandria in the next twelve months.

Figure 5.24: How likely are you to visit Alexandria, VA for leisure or personal reasons in the next 12 months?

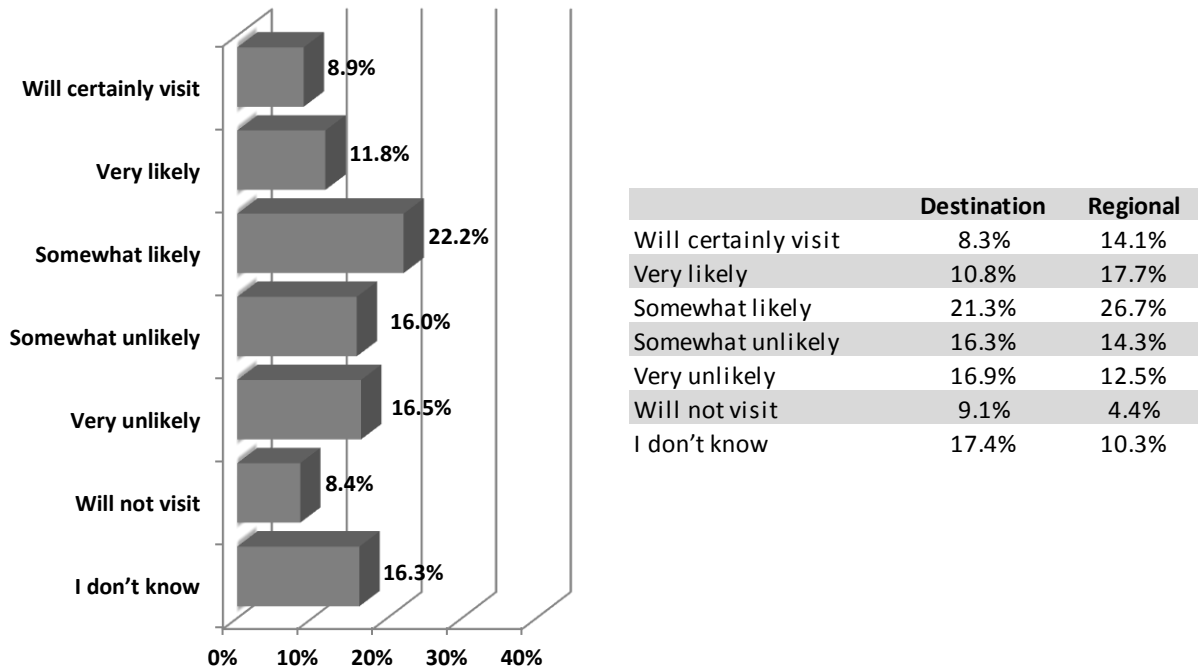


FIGURE 5.24 - Question 24: How likely are you to visit Alexandria, VA for leisure or personal reasons in the next 12 months? (Select one) Base: All respondents. 4807 completed surveys.

Recall of Alexandria Advertisements (Unaided)

When survey respondents were asked if they had seen or heard any advertisements for travel to Alexandria in the last 12 months, 14.4 percent reported with certainty that they indeed had. Another 18.4 percent were unsure.

Figure 5.25: In the past 12 months, do you recall seeing and/or hearing any advertisements (in magazines, newspapers, visitors guides, online, in an app, or on the radio) for leisure travel to Alexandria, VA?

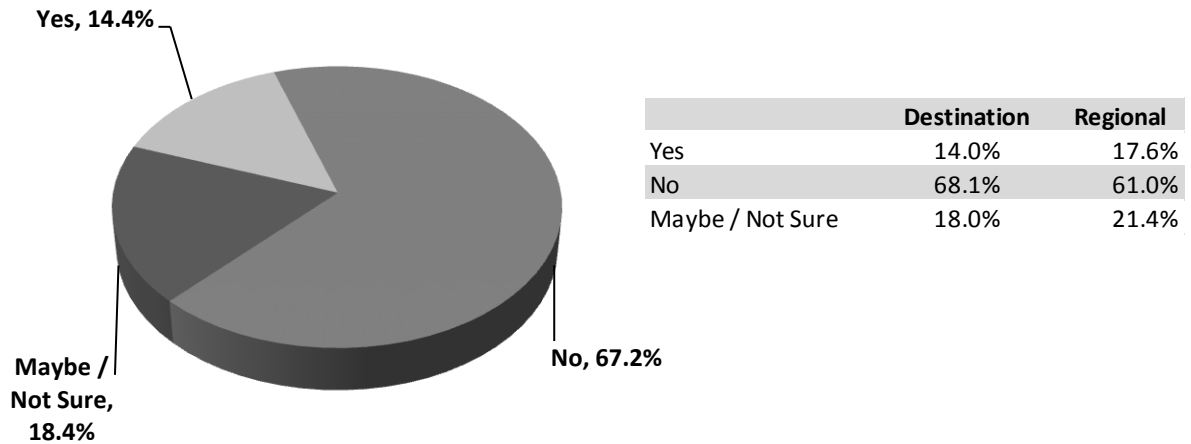


FIGURE 5.25 – Question 25: In the past 12 months, do you recall seeing and/or hearing any advertisements (in magazines, newspapers, visitor’s guides, online, in an app, or on the radio) for leisure travel to Alexandria, VA? Base: All respondents. 4,807 completed surveys.

Advertising Media Recall

Respondents who said they recalled seeing advertising for leisure travel to Alexandria in the past year were asked to select the media in which they had seen this advertising. The most significant percentage of respondents who recalled seeing Alexandria travel advertising said they saw an ad(s) in a magazine (50.9%). Over 40 percent recalled seeing such advertising online, and 33.7 percent said they saw the advertising in a newspaper. Given these results, this group was fairly likely to have been exposed to Alexandria tourism messages across multiple media.

Figure 5.26: Where did you see and/or hear this advertising? (Select each of the following media in which you recall having seen an Alexandria, VA travel advertisement in the past 12 months.)

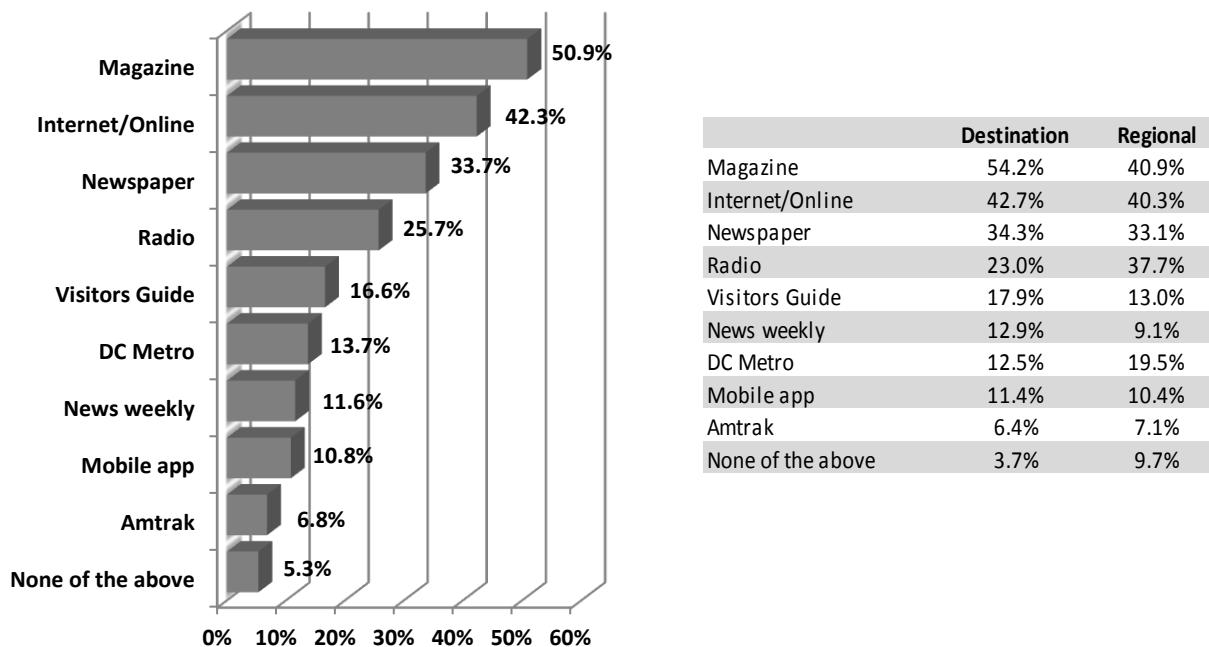


FIGURE 5.26 - Question 26: Where did you see and/or hear this advertising? (Select each of the following media in which you recall having seen an Alexandria, VA travel advertisement in the past 12 months.) Base: Respondents who saw leisure travel advertisements for Alexandria, VA. 692 completed surveys.

Recall of Magazine Advertisements (Aided)

Respondents were shown the print ads that comprised the campaign and asked whether they had seen the ads in any magazines in the past year. 14.6 percent recalled seeing these magazine ads. Of the campaign media tested in the survey, magazines had the highest recall. [Print also enjoyed the highest levels of unaided recall, with 50.3 percent of those who saw or heard the ads saying they saw an Alexandria leisure ad(s) in a magazine.] One of the factors contributing to these results is likely the wide geographic area covered by the magazine media used in the campaign.

Figure 5.27: During the past 12 months, do you recall having seen any of these advertisements in any magazines or visitors guides?

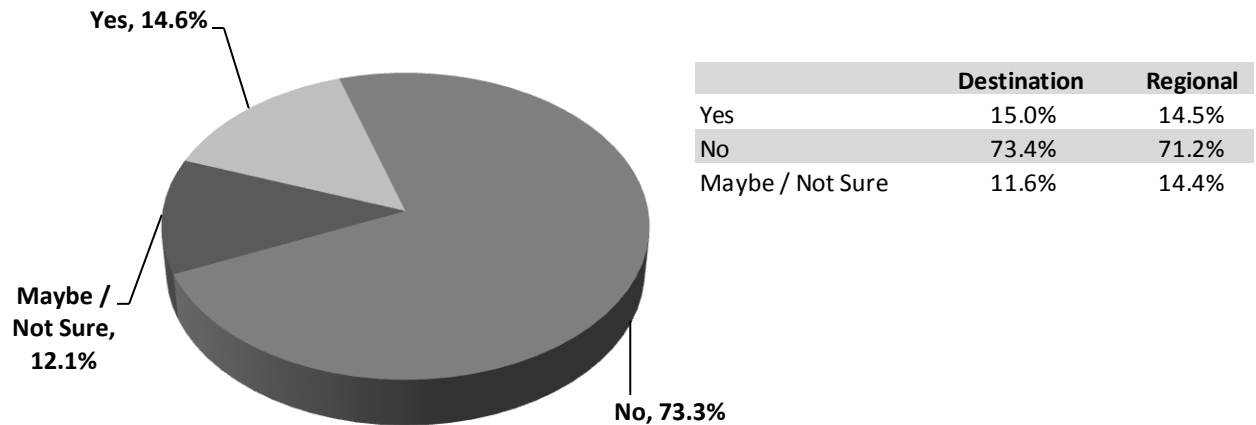


FIGURE 5.27 - Question 27: During the past 12 months, do you recall having seen any of these advertisements in any magazines or visitors guides? Base: All respondents. 4,876 completed surveys.

Recall of Newspaper Advertisements (Aided)

Similarly, penetration by the campaign's newspaper advertisements reached more than one in ten residents of the area of study. 12.1 percent of survey respondents said they recall having seen one or more of the ads that appeared in newsprint.

Figure 5.28: During the past 12 months, do you recall having seen any of these advertisements in any printed newspapers or news weeklies?

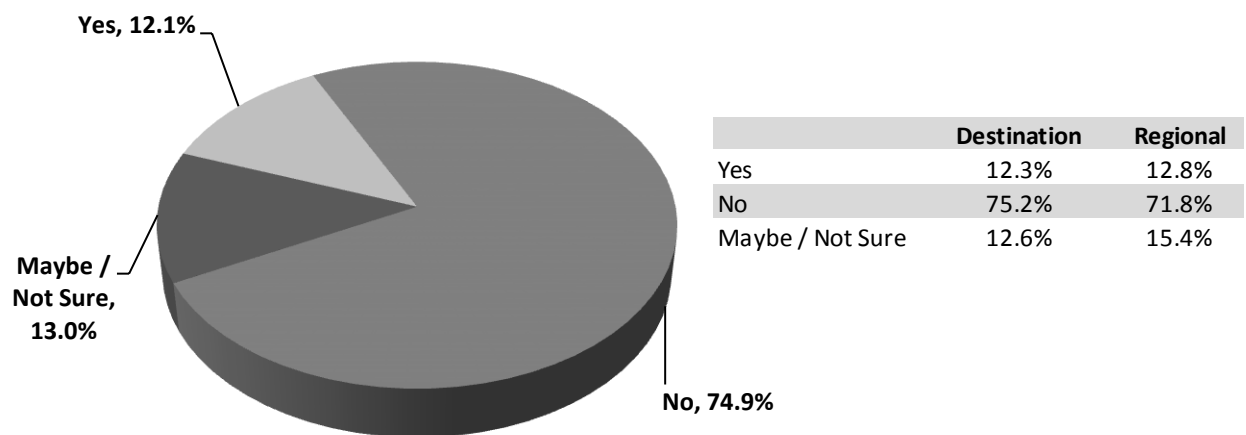


FIGURE 5.28 - Question 28: During the past 12 months, do you recall having seen any of these advertisements in any printed newspapers? Base: All respondents. 4,807 completed surveys.

Recall of Digital Display Advertisements (Aided)

Respondents were then shown the digital display advertisements used in the campaign and were asked if they had seen these ads anywhere online. 13.1 percent said they had in fact seen these ads online—the second highest recall rate of the ad creative/media tested.

Figure 5.29: During the past 12 months, do you recall having seen these advertisements anywhere online?

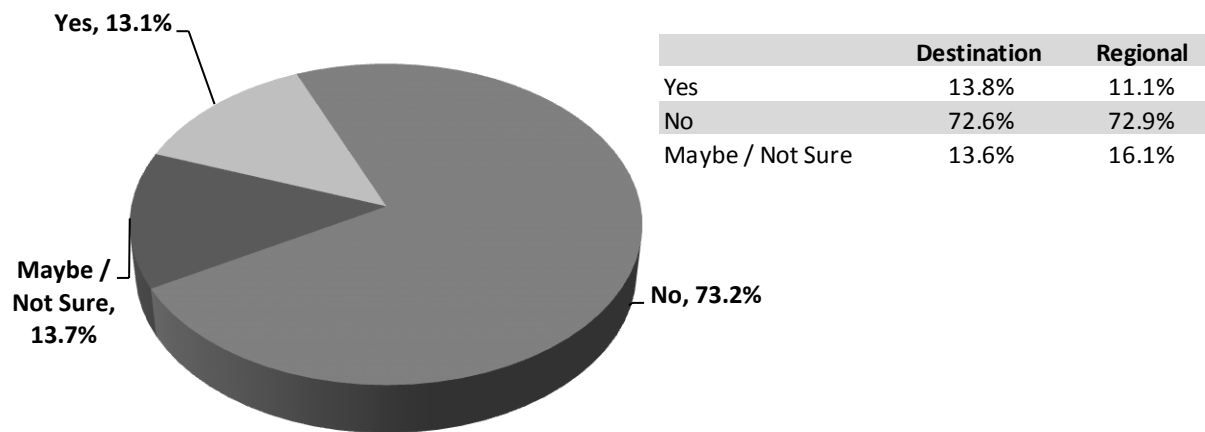


FIGURE 5.29 - Question 29: During the past 12 months, do you recall having seen these advertisements anywhere online? Base: All respondents. 4,807 completed surveys.

Recall of Online Video Advertisement (Aided)

Respondents were then shown the Alexandria video advertisement and asked if they had seen this ad anywhere online. Similar to the recall rates for the digital display ads, 12.6 percent said they recalled seeing the video ad online in the past year.

Figure 5.30: During the past 12 months, do you recall having seen these advertisements anywhere online?

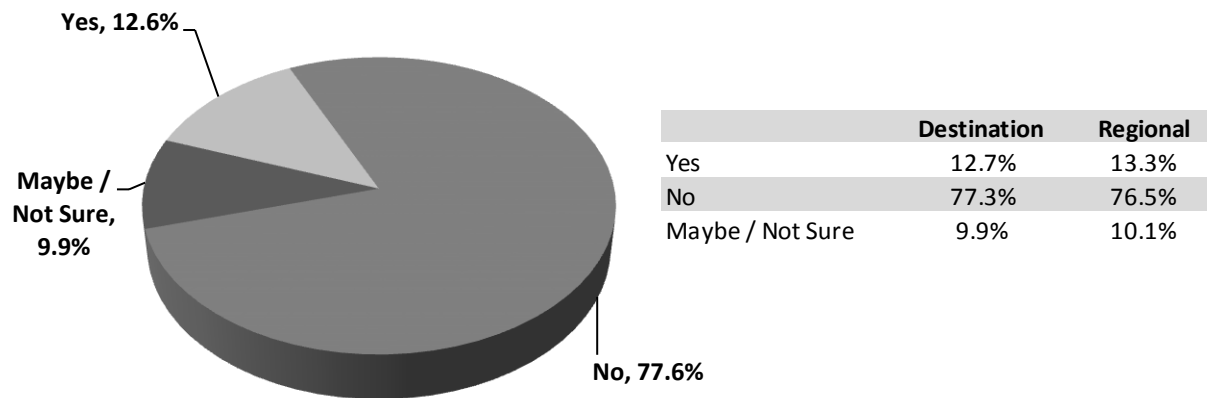


FIGURE 5.30 - Question 30: During the past 12 months, do you recall having seen this advertisement anywhere online? Base: All respondents. 4,807 completed surveys.

Recall of DC Metro Advertisements (Aided)

Respondents were then shown the Alexandria advertisements that were featured in DC Metro stations and asked if they had seen these ads. Just under one in ten residents of the area of study (9.7%) said they recalled seeing the DC Metro ads in the past year.

Figure 5.31: During the past 12 months, do you recall having seen these advertisements on the DC Metro?

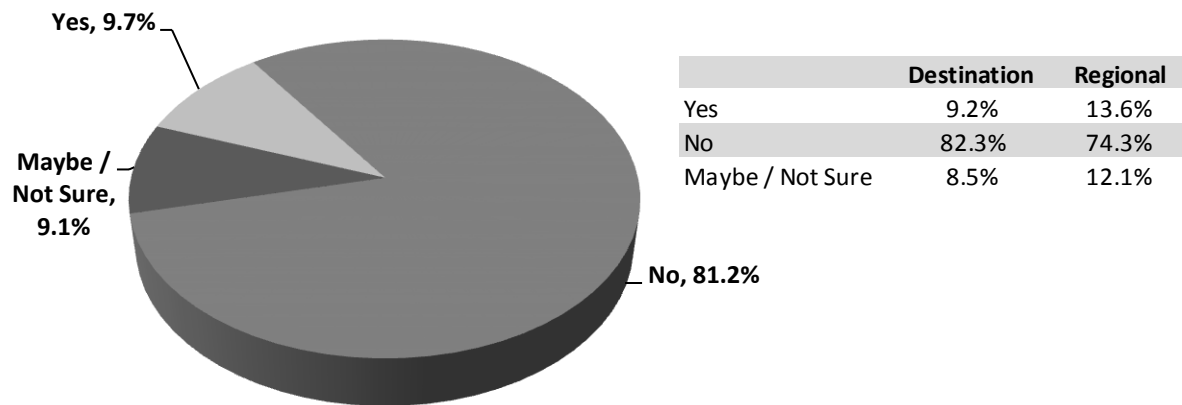


FIGURE 5.31 - Question 31: During the past 12 months, do you recall having seen these advertisements on the DC Metro? Base: All respondents. 4,807 completed surveys.

Advertising's Overall Effectiveness

After viewing the major creative components of the campaign, respondents were asked how effective the ads are in portraying Alexandria as a place they would enjoy visiting for leisure reasons. The advertising creative was very effective at positioning Alexandria as an attractive leisure destination. Two-thirds of respondents (66.9%) agreed that the campaign creative is “effective” or “very effective” in portraying Alexandria as a place they would enjoy visiting for leisure. Only 9.2 percent felt the advertising was “ineffective” or “very ineffective.”

Figure 5.32: After viewing this series of advertisements, overall, how effective do you think these advertisements are in portraying Alexandria, VA as a place you would enjoy visiting for leisure reasons? (Select one)

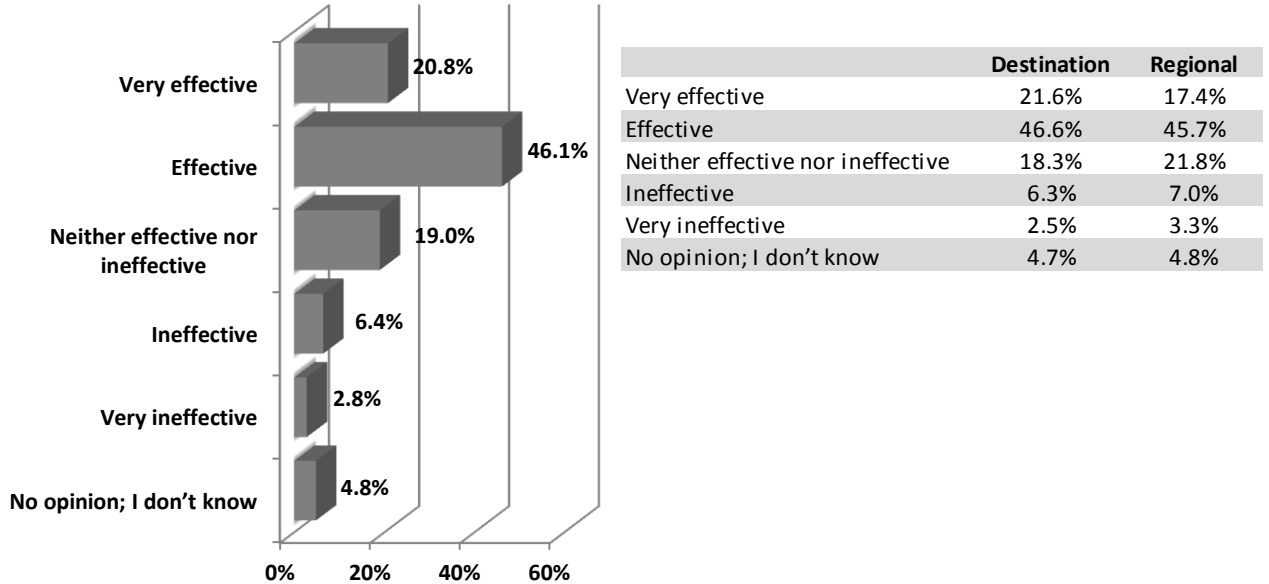


FIGURE 5.32 - Question 32: After viewing this series of advertisements, overall, how effective do you think these advertisements are in portraying Alexandria, VA as a place you would enjoy visiting for leisure reasons? (Select one) Base: All respondents. 4,807 completed surveys.

Advertising's Effectiveness in Communicating Campaign's Central Messages

Survey respondents were then asked to use a scale to rate how effective the advertising was overall in portraying Alexandria in the ways that the campaign intended. Figure 5.35 below shows the percent of respondents who said that the advertising portrayed each messaging aspect “effectively” or “very effectively.” Respondents had the highest agreement that the advertising campaign effectively portrayed Alexandria as “a place with a vibrant arts & cultural scene” (78.6%).

Figure 5.33: Overall, how effective do you think these advertisements are in portraying the following aspects of Alexandria, VA? Please use the five point scale below where “5” represents “Very effectively” and “1” represents “Very ineffectively.”

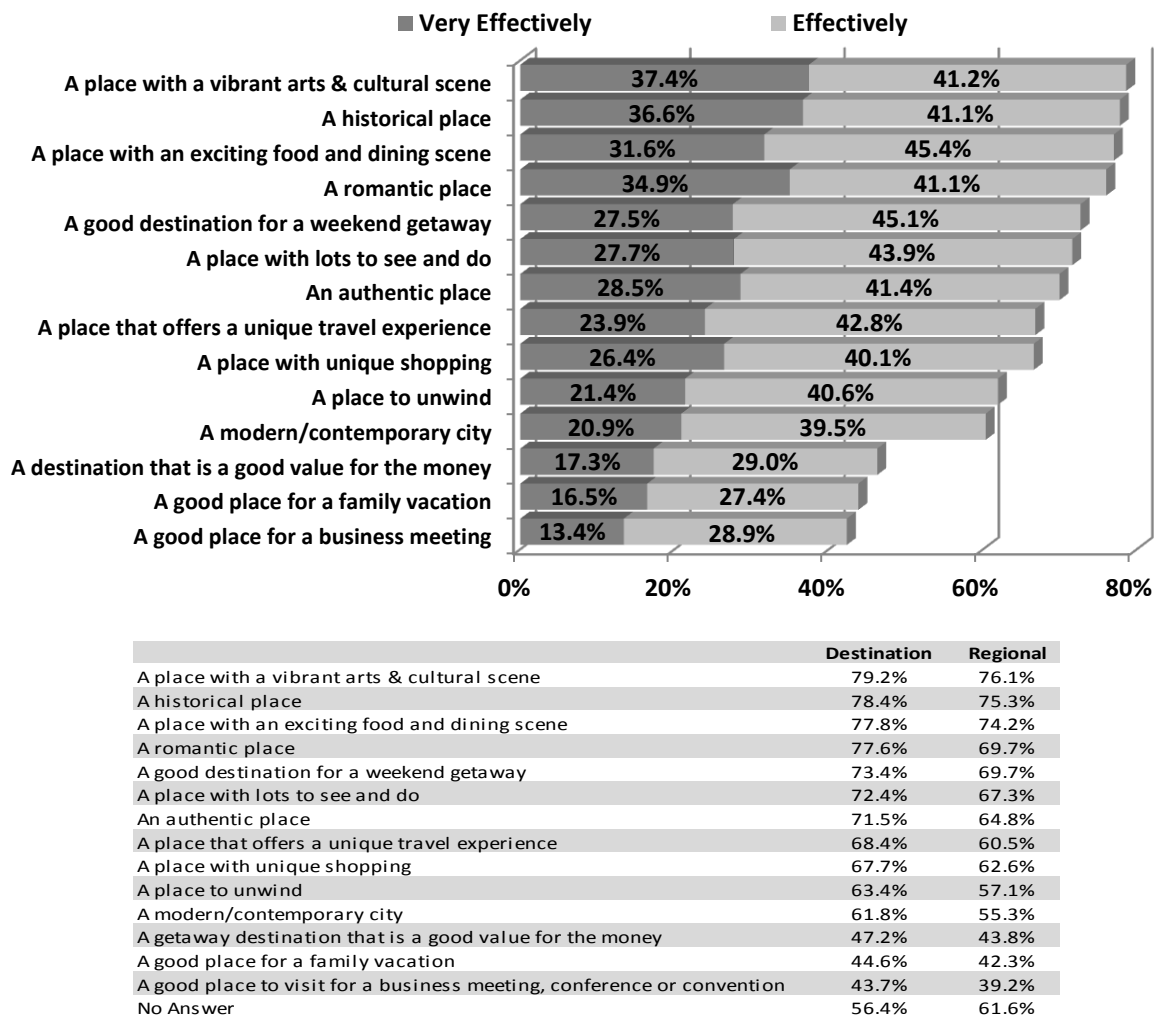
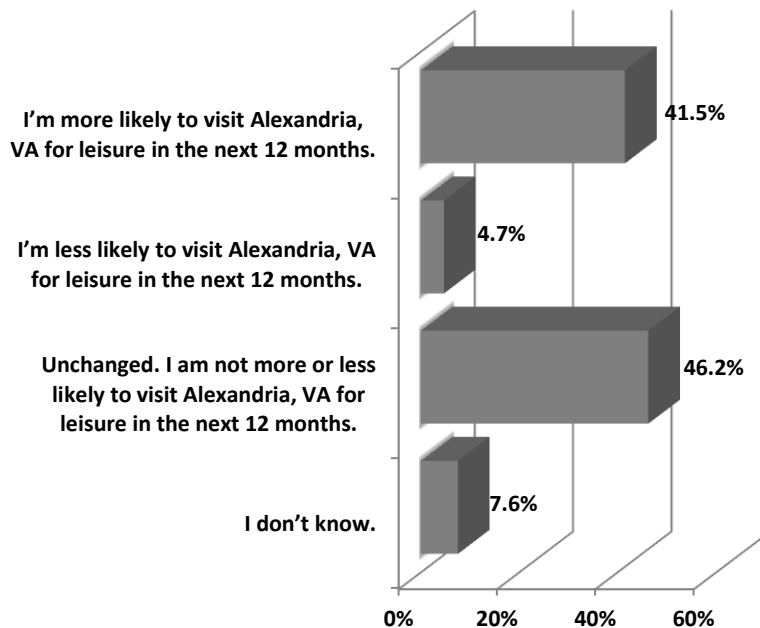


FIGURE 5.33 - Question 33: Overall, how effective do you think these advertisements are in portraying the following aspects of Alexandria, VA? (Please use the five point scale below where 1 represents “Very ineffectively” and 5 represents “Very effectively”) The advertisements portray this aspect of Alexandria, VA... Base: All respondents. 4,807 completed surveys.

Advertisements' Effect on Likelihood to Visit Alexandria

Survey respondents were asked how the ads they viewed would affect their likelihood to visit Alexandria in the next year. Over 40 percent of respondents felt that the ads made them *more likely* to visit Alexandria. Only 4.7 percent said the ads had a negative effect on their likelihood to visit, while 7.6 percent were unsure. The remaining half said they were “Unchanged” in their likelihood to visit Alexandria.

Figure 5.34: How did the advertisements you viewed today affect your likelihood to visit Alexandria, VA for leisure in the next 12 months? (Select one)



	Destination	Regional
I'm more likely to visit Alexandria, VA for leisure in the next 12 months.	42.5%	38.3%
Unchanged. I am not more or less likely to visit Alexandria, VA for leisure in the next 12 months.	44.8%	51.8%
I'm less likely to visit Alexandria, VA for leisure in the next 12 months.	4.7%	4.3%
I don't know.	8.0%	5.6%

FIGURE 5.34 - Question 34: How did the advertisements you viewed today affect your likelihood to visit Alexandria, VA for leisure in the next 12 months? (Select one) Base: All respondents. 4,807 completed surveys.

Advertising's Influence on Decision to Visit Alexandria

Those survey respondents who reported having made at least one trip to Alexandria in the past year and who recalled seeing at least one of the ads were asked if the ad or ads they saw had in any way influenced their decision to visit Alexandria. 52.5 percent of these persons reported that the advertising did indeed influence their decision to visit Alexandria.

Figure 5.35 – You said that you recall seeing one or more of the Alexandria, VA tourism ads that you reviewed earlier in the survey. Did this ad (or ads) you saw in any way influence your decision to visit Alexandria, VA?

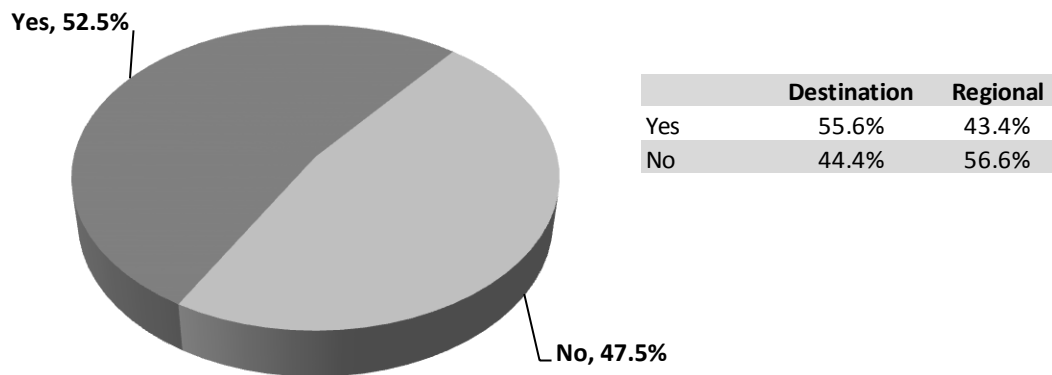
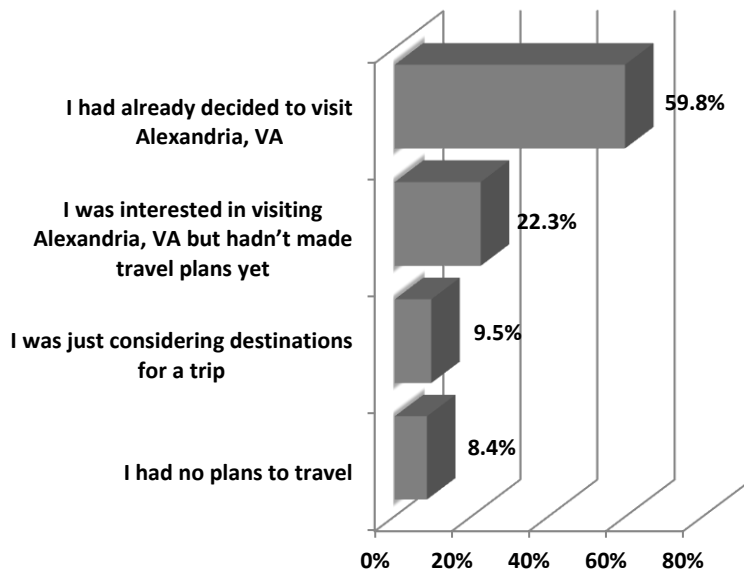


TABLE 5.35 – Question 35: You said that you recall seeing one or more of the Alexandria, VA tourism ads that you reviewed earlier in the survey. Did this ad (or ads) you saw in any way influence your decision to visit Alexandria, VA? Base: Respondents who visited Alexandria and recall seeing one or more tourism advertisements. 179 completed surveys.

Point in Travel Decision When Exposed to Advertising

Those survey respondents who reported having made at least one trip to Alexandria in the past year and who recalled seeing at least one of the ads were asked at what point in their decision process they were when they saw this advertising. 40.2 percent report having been at a point of potential influence.

Figure 5.36 - When you saw the advertisement(s) for Alexandria, VA, where were you in the process of deciding to travel? Please select the one option that best describes where you were in your travel decision.



	Destination	Regional
I had already decided to visit Alexandria, VA	59.0%	60.4%
I was interested in visiting Alexandria, VA but hadn't made travel plans yet	26.9%	13.2%
I was just considering destinations for a trip	4.7%	18.9%
I had no plans to travel	9.4%	7.5%

FIGURE 5.36 - Question 36: When you saw the advertisement(s) for Alexandria, VA, where were you in the process of deciding to travel? Please select the one option that best describes where you were in your travel decision. Base: Respondents who visited Alexandria and recall seeing one or more tourism advertisements. 179 completed surveys.

Recall of Travel Articles about Alexandria

The Alexandria CVA facilitates public relations outreach efforts to generate earned media for Alexandria. In total, 12.6 percent of residents of the area of study reported having seen a newspaper or magazine article about leisure travel to Alexandria in the past year. At this level, awareness of public relations is very close to the 14.4% reported for advertising. This suggests that public relations is highly efficient, given that spending on P.R. was one tenth that of advertising.

Figure 5.37 – In the past 12 months, do you recall seeing any articles in newspapers or magazines – either printed or online – that made you want to visit Alexandria, VA?

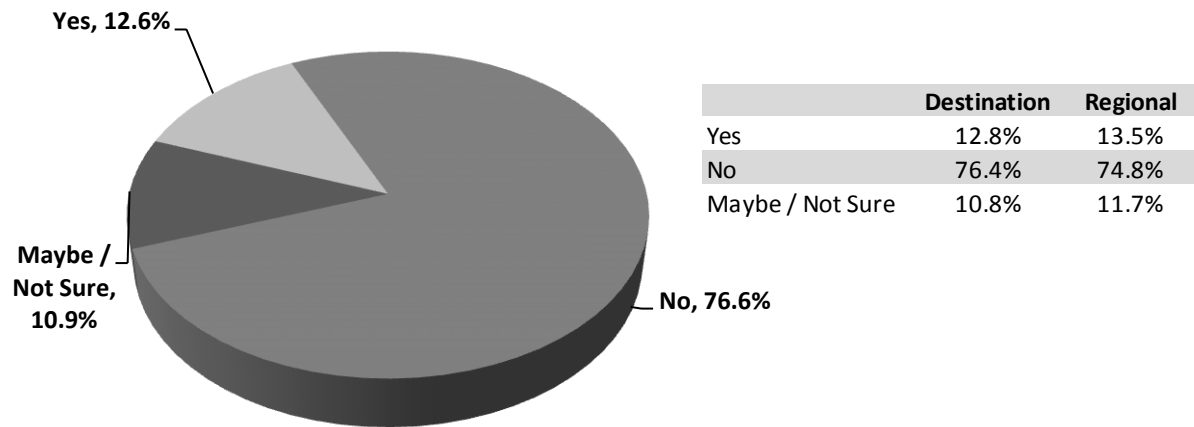


FIGURE 5.37 - Question 37: In the past 12 months, do you recall seeing any articles in newspapers or magazines – either printed or online – that made you want to visit Alexandria, VA? Base: All respondents. 4,807 completed surveys.

Recall of Online Content about Alexandria

As PR efforts also extend to Internet press, respondents were asked if they recalled seeing any leisure travel features on blogs or other internet sites about Alexandria. In total, 9.1 percent reported having seen such a story online.

Figure 5.38 – In the past 12 months, do you recall seeing any features on blogs or elsewhere online that made you want to visit Alexandria, VA?

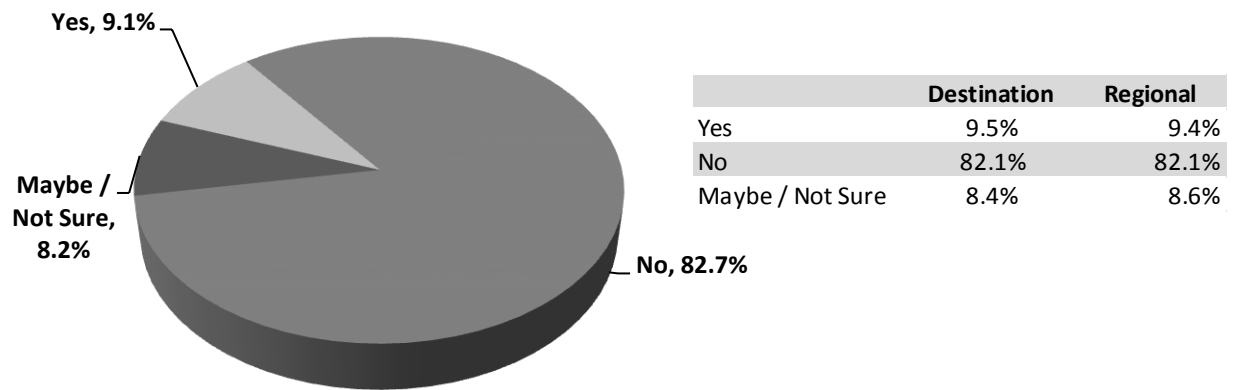


FIGURE 5.38 - Question 38: In the past 12 months, do you recall seeing any features on blogs or elsewhere online that made you want to visit Alexandria, VA? Base: All respondents. 4,807 completed surveys.

Recall of Television Features about Alexandria

Similarly, respondents were asked if they recalled seeing any leisure travel features on television about Alexandria. In total, 10.6 percent reported having seen travel-related coverage of Alexandria on television.

Figure 5.39 – In the past 12 months, do you recall seeing any stories or features on television that made you want to visit Alexandria, VA?

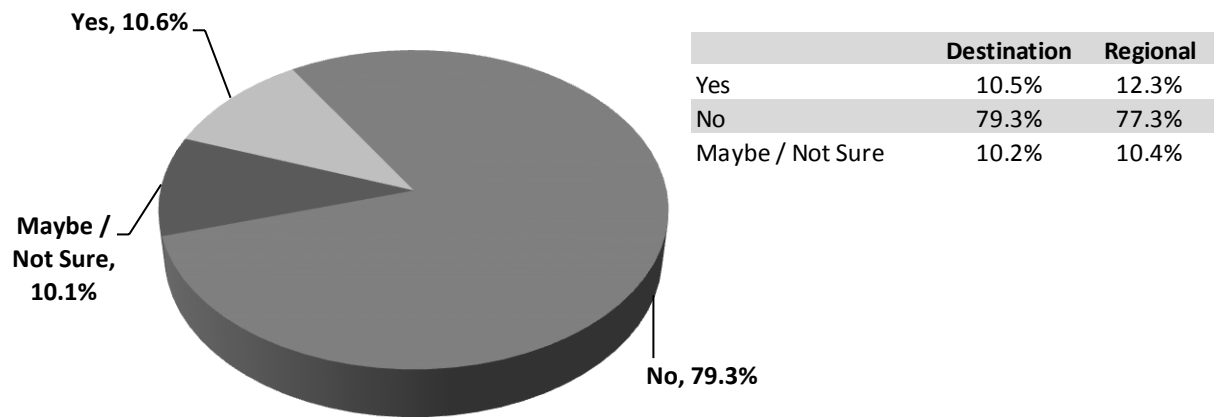


FIGURE 5.39 - Question 39: In the past 12 months, do you recall seeing any stories or features on television that made you want to visit Alexandria, VA? Base: All respondents. 4,807 completed surveys.

Likelihood to Recommend Alexandria

Survey respondents were asked how likely they would be to recommend Alexandria as a place to visit. In total, 41.9 percent said they were “likely” or “very likely” to do so; another 32.2 percent said they were “somewhat likely.”

Figure 5.40 – How likely are you to recommend Alexandria, VA as a place to visit to family members, friends and/or colleagues? (Select one)

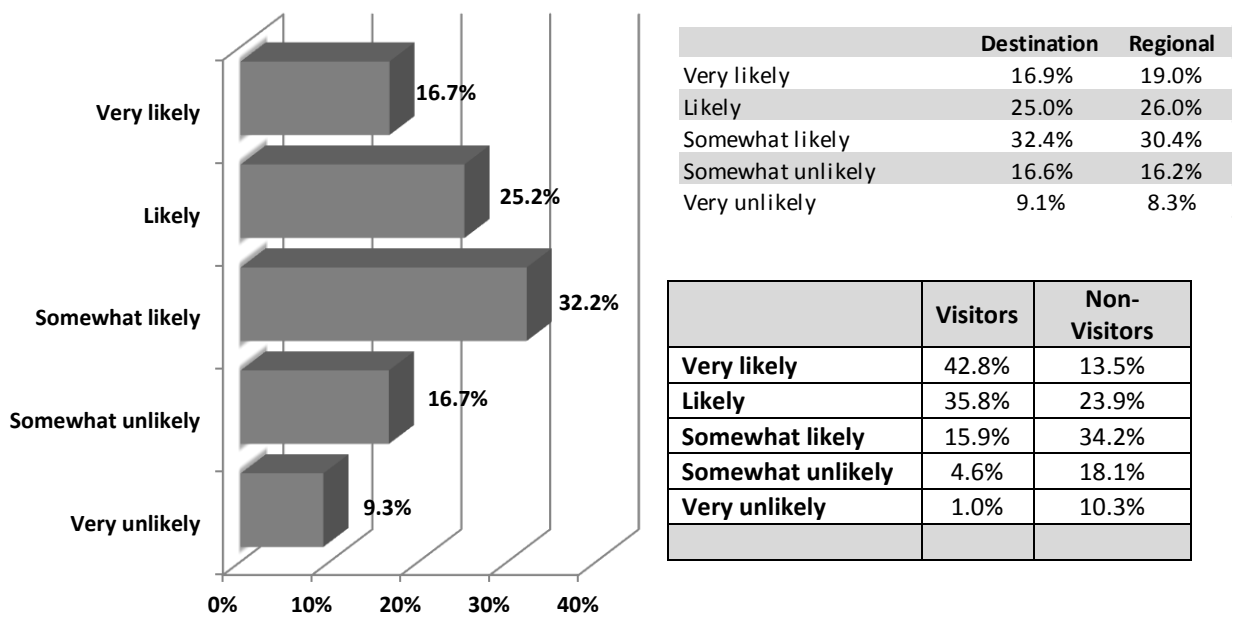


FIGURE 5.40 - Question 40: How likely are you to recommend Alexandria, VA as a place to visit to family members, friends and/or colleagues? (Select one) Base: All respondents. 4,807 completed surveys.

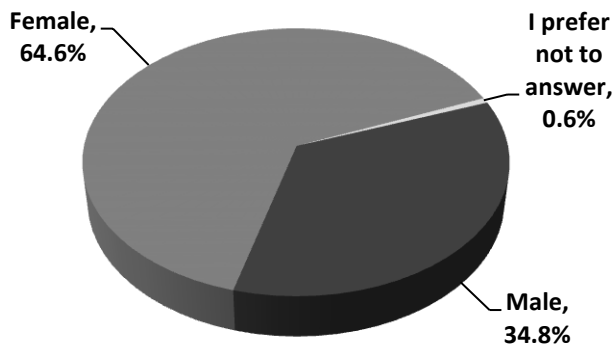
Demographics

This section presents a demographic profile of survey respondents. The findings of the survey's demographic questions are presented in the order they were asked.

Gender

Survey respondents skewed female, with 64.6 percent being women.

Figure 6.1 – What is your gender? (Select one)



	Destination	Regional
Female	64.7%	63.4%
Male	34.7%	35.8%
I prefer not	0.6%	0.8%

TABLE 6.1 – Question 41: What is your gender? (Select one) Base: All respondents. 4,807 completed surveys.

Age

Survey respondents were fairly evenly spread amongst millennials, GenX and Baby Boomers. The mean age is 43.6 years.

Figure 6.2 – Which best describes your age? (Select one)

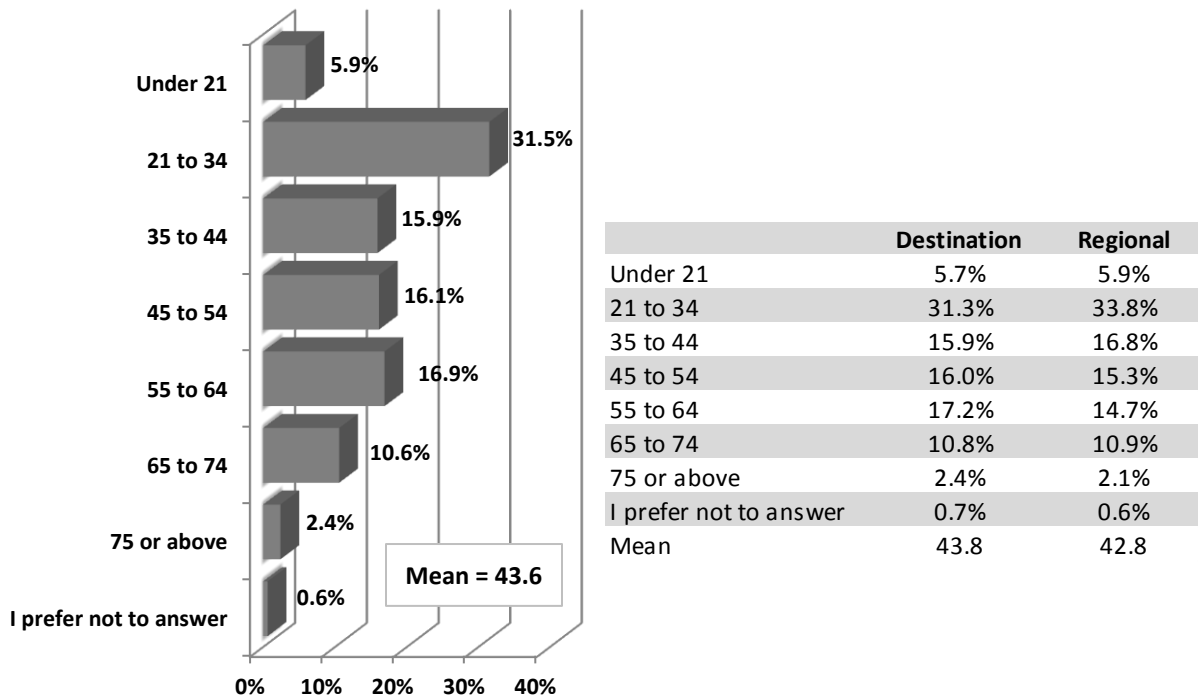


FIGURE 6.2 - Question 42: Which best describes your age? (Select one.) Base: All respondents. 4,807 completed surveys.

Employment Status

The majority of survey respondents are employed in some capacity (60.4%). 39.8 percent are employed full-time and another 6.9 percent are self-employed. 13.8 percent are employed part-time. With many survey respondents over the age of 55, 36.5 percent are not currently employed or retired.

Figure 6.3 – Which best describes your current employment status? (Select one)

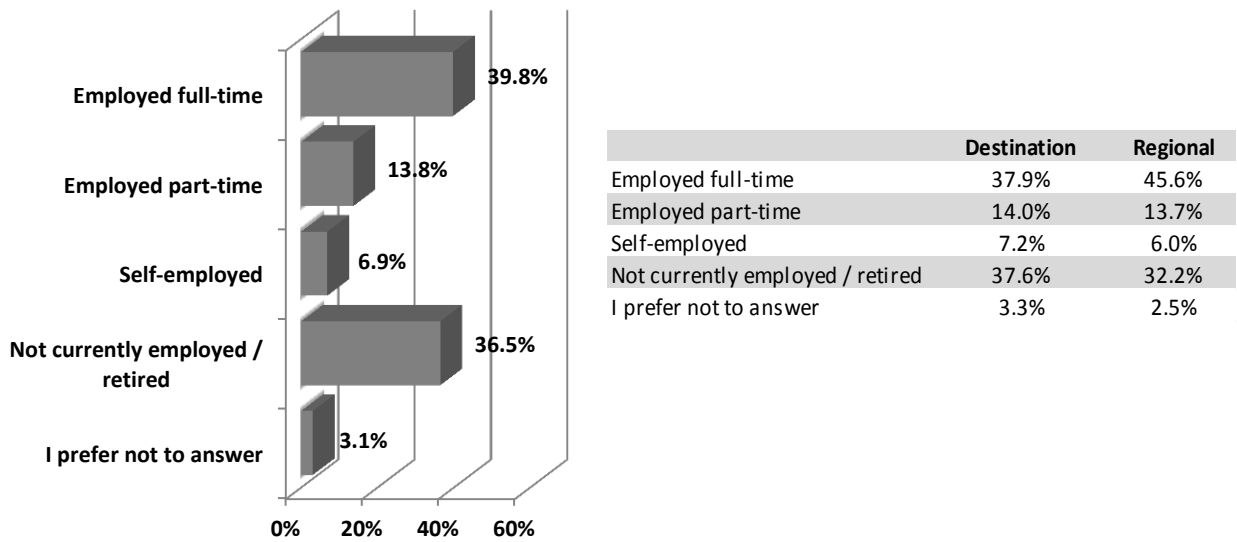


FIGURE 6.3 - Question 43: Which best describes your current employment status? (Select one) Base: All respondents. 4,807 completed surveys.

Formal Education

Figure 6.4 illustrates that over three quarters of survey respondents have at least some college education. 45.6 percent hold at least a bachelor’s degree, including 18.5 percent who have a graduate degree.

Figure 6.4 – Which best represents the highest level of formal education you have completed? (Select one)

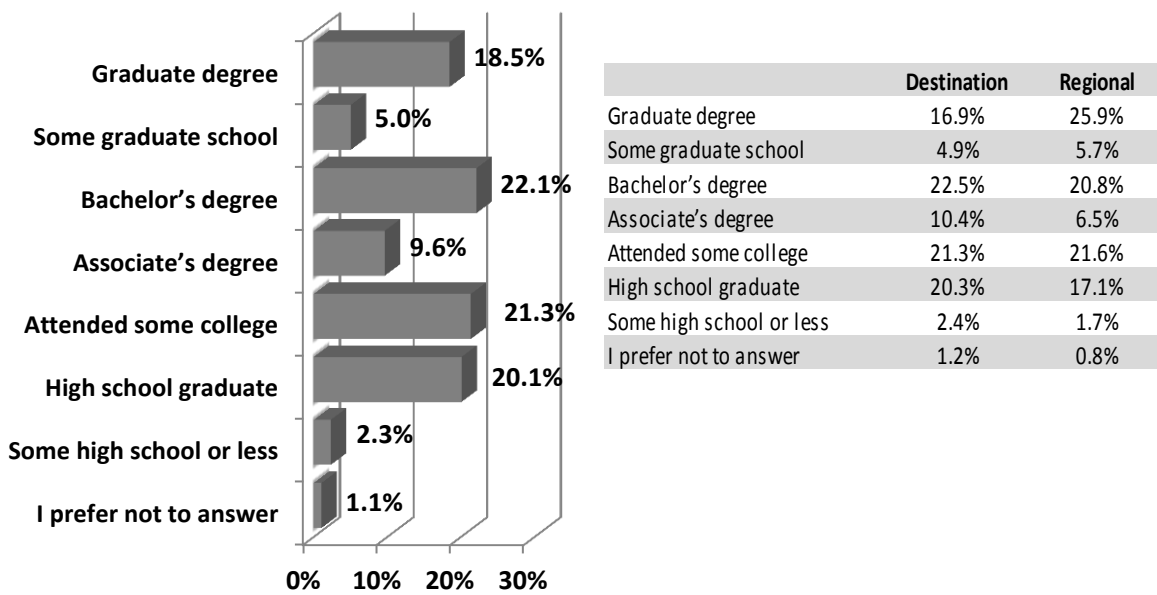


FIGURE 6.4 - Question 44: Which best represents the highest level of formal education you have completed? (Select one) Base: All respondents. 4,807 completed surveys.

Annual Household Income

The average annual household income of survey respondents is \$74,090 with 54 percent having an annual household income in excess of the \$50,000 threshold.

Figure 6.5 - Which of the following best describes the combined annual income of all members of your household? (Select one.)

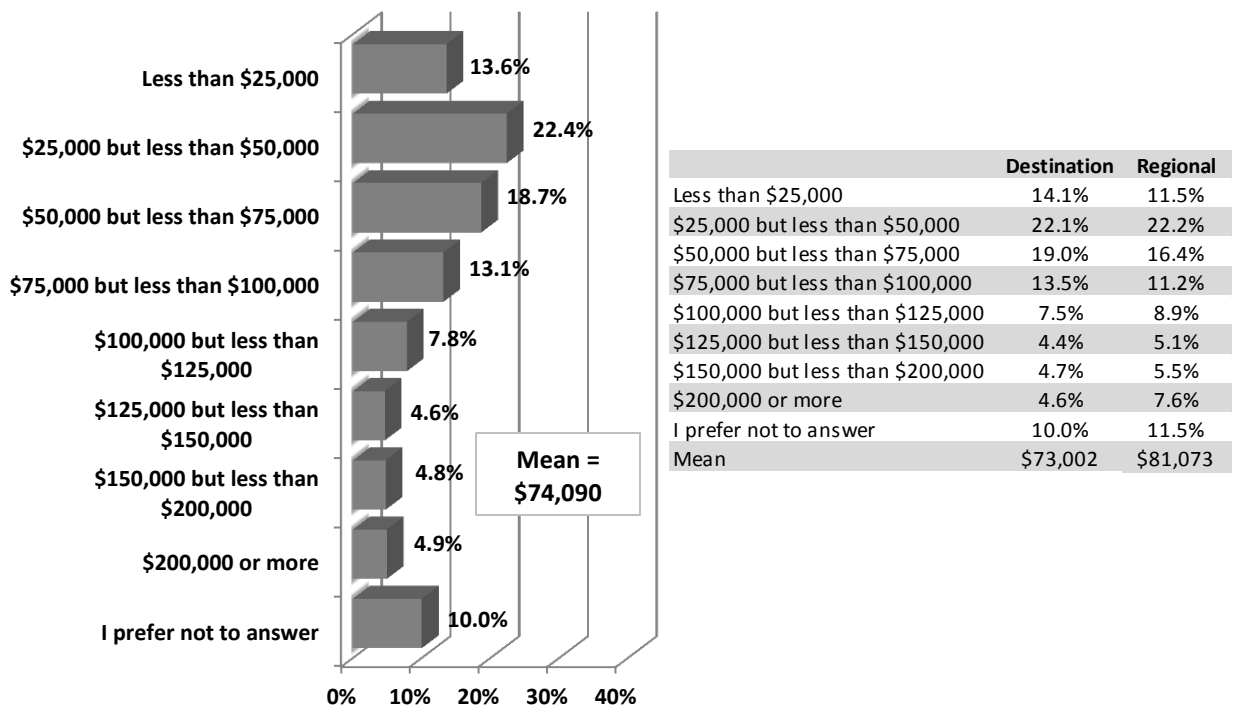


FIGURE 6.5 - Question 45: Which of the following best describes the combined annual income of all members of your household? (Select one.) Base: All respondents. 4,807 completed surveys.

Ethnic Background

The majority (74.3%) of respondents are Caucasian. Greater than one in ten is African-American (11.8%). Asians represented 5.4 percent of respondents and Latinos 4.6 percent.

Figure 6.6 – Which best describes your race or ethnic background? (Select one)

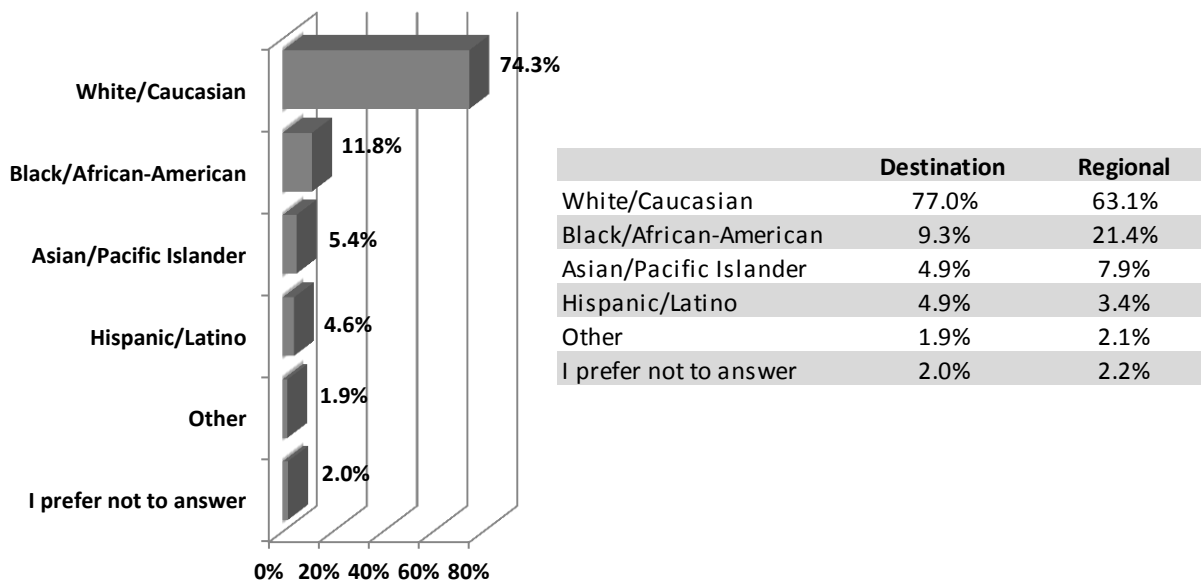


FIGURE 6.6 – Question 46: Which best describes your race or ethnic background (Select one) Base: All respondents. 3,876 completed surveys.

Marital Status

Figure 6.8 (below) shows the proportion of survey respondents in each marital status category. 53.4 percent of survey respondents reported being married or in a domestic partnership. More than a third (35.8%) of respondents are single. 20.8 percent have children under the age of 18.

Figure 6.7 - Which best describes your current marital status? (Select one)

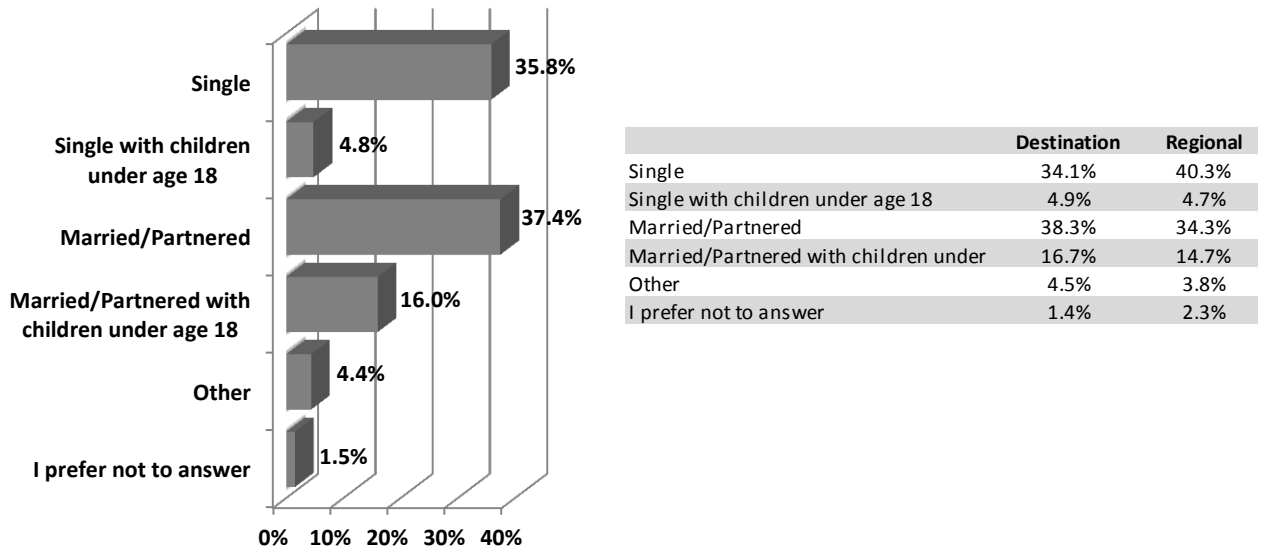


FIGURE 6.7 - Question 47: Which of the following best describes your current marital status? (Select one.) Base: All respondents. 4,807 completed surveys.

Appendix I: Survey Questionnaire

The complete survey questionnaire is presented following.

Travel Survey

Thank you for your help with this survey. Please thoroughly read each question and carefully review any images or other media shown to you. The survey will take approximately 10-15 minutes to complete.

1. Are you 18 years of age or older?

- Yes
- No

2. In which state do you reside?

- Connecticut
- Delaware
- District of Columbia
- Georgia
- Kentucky
- Maryland
- Massachusetts
- New Jersey
- New York
- North Carolina
- Ohio
- Pennsylvania
- Rhode Island
- South Carolina
- Tennessee
- Virginia
- West Virginia
- NONE OF THESE

3a. Do you live within 50 miles of Philadelphia?

- Yes
- No

3b. Do you live within 50 miles of Washington, DC or Baltimore, MD?

- Yes
- No

4. What is your zip code? Please enter it below.

Zip code: _____

4. Assume that you want to take a getaway trip in the Eastern U.S. You are considering a destination that is historic, picturesque and romantic, while offering contemporary dining, unique shopping, arts and culture nearby a major metropolitan area. Which destinations in the Eastern U.S. first come to mind as offering this experience?

Please list up to four (4) destinations that first come to mind in the spaces below.

- 1. _____
- 2. _____
- 3. _____
- 4. _____

5. Which of these magazines do you recall reading or looking through at least once in the past 12 months? (Select all that apply)

- Amtrak Arrive

- Cooking Light
- Elle Décor
- Food & Wine
- Food Network Magazine
- Good Housekeeping
- Pathfinders Magazine
- Philadelphia Magazine
- Real Simple
- Redbook
- Town & Country
- Travel & Leisure
- Virginia Living Magazine
- Washington Life Magazine
- Where Magazine
- Women's Day
- Washingtonian
- Washington Post Sunday Magazine
- Where Magazine

6. Which of the printed versions of these newspapers and news weeklies do you recall reading or looking through at least once in the past 12 months? (Select all that apply)

- Alexandria Gazette Packet
- Alexandria Times
- Arlington Connection
- McLean Connection
- Mount Vernon Gazette
- Old Town Crier
- Potomac Almanac
- Springfield Connection
- The Express
- Washington Blade
- Washington Post
- The Washington Informer

7. Which of these websites, web services and/or apps do you recall using at least once in the past 12 months? (Select all that apply)

- Expedia
- ExploreDC
- Facebook
- Google
- Smithsonian.com
- TripAdvisor
- Virginia.org
- Washington.org
- WashingtonBlade.com
- WashingtonExaminer.com
- WashingtonLife.com
- WashingtonPost.com
- AlexandriaGazette.com
- AlexandriaTimes.com

8. In the past 12 months, how many leisure trips (vacations, weekend getaways, and trips for other personal reasons) have you taken? Please enter a numeric value below.

Leisure Trips: _____

9. In the past 12 months, which of these cities did you visit for leisure or other personal reasons? (Consider both overnight and day visits. Select all that apply)

- Alexandria, VA
- Annapolis, MD
- Atlanta, GA
- Baltimore, MD
- Boston, MA
- Chicago, IL
- Miami, FL
- New York City, NY
- Orlando, FL
- Philadelphia, PA
- Pittsburgh, PA
- Raleigh, NC
- Richmond, VA
- Washington, DC
- Williamsburg, VA
- NONE OF THE ABOVE

10. You said that you visited Alexandria, VA for leisure or other personal reasons in the past 12 months. How many trips for leisure reasons did you make to Alexandria, VA in the past 12 months? (Please enter the number below.)

Leisure Trips to Alexandria, VA: _____

11. In which month(s) did you visit Alexandria, VA on a leisure trip(s)? (Select all that apply)

- August 2013
- September 2013
- October 2013
- November 2013
- December 2013
- January 2014
- February 2014
- March 2014
- April 2014
- May 2014
- June 2014
- July 2014
- August 2014
- Other

The next questions will ask you about the most recent leisure trip you took to Alexandria, VA in the past 12 months. Thus, if you took more than one trip to Alexandria, VA in the past 12 months, please only consider your most recent trip in your responses.

12. Which best describes your reason for visiting Alexandria, VA on this most recent leisure trip? (Select one)

- Vacation
- Weekend getaway
- Day trip
- Visit friends or family
- Attend an event (fair/festival, sporting event, concert)
- Attend a personal event or wedding
- Add-on to a business trip

13. Who were you traveling with on this trip to Alexandria, VA? (Select all that apply)

- Spouse, partner or significant other
- Friends (another couple or couples)
- Friends (same gender)
- Friends (mixed genders)
- Children (your own)
- Children (others)
- Other family (reside outside your household)
- Solo

14. How many total days and nights was this trip in which you visited Alexandria, VA?

Total trip days: _____

Total trip nights: _____

15. How many total days and nights did you specifically spend in Alexandria, VA on this trip?

Total trip days in Alexandria, VA: _____

Total trip nights in Alexandria, VA: _____

16. During this trip in which you visited Alexandria, VA, in what type(s) of lodging did you stay? (Select all that apply)

- Paid accommodations (such as a hotel, motel or bed & breakfast) inside the city of Alexandria, VA
- Paid accommodations (such as a hotel, motel or bed & breakfast) inside the District of Columbia
- Paid accommodations (such as a hotel, motel or bed & breakfast) elsewhere outside of Alexandria, VA or the District of Columbia

VA or the District of Columbia

- Home rental (AirBnB, VRBO, etc) inside the city of Alexandria, VA
- Home rental (AirBnB, VRBO, etc) elsewhere outside the city of Alexandria, VA
- Residence of friend or family member inside the city of Alexandria, VA
- Residence of friend or family member elsewhere outside the city of Alexandria, VA
- None of these (I was on a day trip only or just passing through)

17. Approximately how much IN TOTAL did you spend on the following while in the city of Alexandria, VA? (Please do not include any spending outside Alexandria, VA, e.g. any expenses incurred in Washington, DC.)

Lodging (before tax) _____

Restaurants & dining _____

Retail purchases _____

Entertainment & sightseeing _____

Gas, parking & local transportation _____

Other _____

18. How many people did this spending cover (including yourself)?

Number of people: _____

19. How many people were in your immediate travel party (including yourself)?

Adults age 18+: _____

Children under age 6: _____

Children age 6-10: _____

Children age 11-13: _____

Children age 14-17: _____

20. Which of the following were IMPORTANT to your decision to make this visit to Alexandria, VA? (Select all that apply)

- Well-preserved 18th and 19th century architecture
- Friends or family in the area
- I got a good deal on hotel, attractions or other travel components

- Alexandria is romantic
- Alexandria is upscale
- Alexandria is family-friendly
- Alexandria is a good value
- Alexandria is uncontrived and authentic
- Historic significance
- Art galleries/studios and other visual arts
- Walkable and easy to get around (do not need a car)
- Easy to get to by car, train, plane
- Clean and safe
- Waterfront location
- Public parks and green spaces
- Museums and historic sites
- Proximity to Washington, DC
- Restaurants, cuisine, food scene
- Unique shopping opportunities
- Special event and/or festival
- Theater and/or other performing arts/concerts/live music
- Nightlife
- Overall ambiance and atmosphere

21. Which of the following activities and attractions did you participate in while in Alexandria, VA on this trip? (Select all that apply)

- Attend a special event or festival
- Visit Alexandria's historic sites
- Take a history tour
- Visit art gallery or antique / design store
- Participate in spa, yoga or other beauty / wellness activity
- Stroll King Street ("Old Town")
- Visit Del Ray neighborhood
- Visit Mount Vernon
- Dine in restaurants
- Visit local friends/family
- Visit the Waterfront
- Boat Tour
- Bike Tour
- Torpedo Factory Art Center
- Shopping
- Attend a conference
- Attend a business meeting
- Birchmere Music Hall

22. Which other destinations did you visit on this trip in which you visited Alexandria, VA? (Select all that apply)

- Washington, DC
- Tysons Corner, VA
- Arlington, VA
- Loudoun County, VA ("DC's Wine Country")
- Elsewhere in Northern Virginia
- National Harbor, MD
- Other. Please specify: _____

23. How familiar are you with Alexandria, VA as a place to visit for leisure?

- Very familiar
- Familiar

- Somewhat familiar
- Somewhat unfamiliar
- Unfamiliar
- Not at all familiar

24. How likely are you to visit Alexandria, VA for leisure or personal reasons in the next 12 months?

- Will certainly visit
- Very likely
- Somewhat likely
- Somewhat unlikely
- Very unlikely
- Will not visit
- I don't know

25. In the past 12 months, do you recall seeing and/or hearing any advertisements (in magazines, newspapers, visitors guides, online, in an app, or on the radio) for leisure travel to Alexandria, VA?

- Yes
- No
- Maybe / Not Sure

26. Where did you see and/or hear this advertising? (Select each of the following media in which you recall having seen an Alexandria, VA travel advertisement in the past 12 months.)

- Magazine
- Newspaper
- News weekly
- Internet/Online
- Radio
- Mobile app
- Amtrak
- DC Metro
- Visitors Guide
- None of the above

We would like to ask you a few questions about some recent Alexandria, VA travel advertisements.

Please scroll down and carefully examine the eight (8) print advertisements below. After reviewing these ads please answer the question that follows.

EXTRAORDINARY

Alexandria

HISTORIC ROMANCE
A DASH OF COBBLESTONE
MAKES THE PERFECT WEEKEND

EPICUREAN ESCAPE
COLORFUL DINING
FOR EVERY PALATE

**ONE-OF-A-KIND
BOUTIQUES**
UNFORGETTABLE FASHION
AND HOME DESIGN

ON THE WATERFRONT
PORTSIDE DINING,
A FAMOUS ART CENTER,
AND MONUMENTAL BOAT TOURS

A CAPITAL GETAWAY
JUST MINUTES FROM
WASHINGTON, D.C.

Let's get carried away.
Plan your escape at VisitAlexandriaVA.com

EXTRAORDINARY

Alexandria

EPICUREAN ESCAPE
HISTORY, ARCHITECTURE
AND CULTURE
THROUGH FOOD

A CAPITAL GETAWAY
JUST MINUTES FROM
WASHINGTON, D.C.

PRESIDENTIAL DINING
FIRST FAMILY FAVORITES

ON THE WATERFRONT
PORTSIDE DINING,
A FAMOUS ART CENTER
AND MONUMENTAL BOAT TOURS

There's an art to extraordinary dining.
Find your flavor at VisitAlexandriaVA.com

EXTRAORDINARY

Alexandria

A CAPITAL GETAWAY
JUST MINUTES FROM
WASHINGTON, D.C.

IT'S IN OUR CULTURE
UNIQUE SHOPS AND
GALLERIES MIX ART INTO
YOUR EVERYDAY

ON THE WATERFRONT
PORTSIDE DINING AND
MONUMENTAL BOAT TOURS

ARTS POWERHOUSE
82 ARTISTS' STUDIOS,
SIX GALLERIES,
ONE TORPEDO FACTORY
ART CENTER

EPICUREAN ESCAPE
COLORFUL DINING
FOR EVERY PALATE

**Here, you're only limited
by your imagination.**
Find your inspiration at VisitAlexandriaVA.com



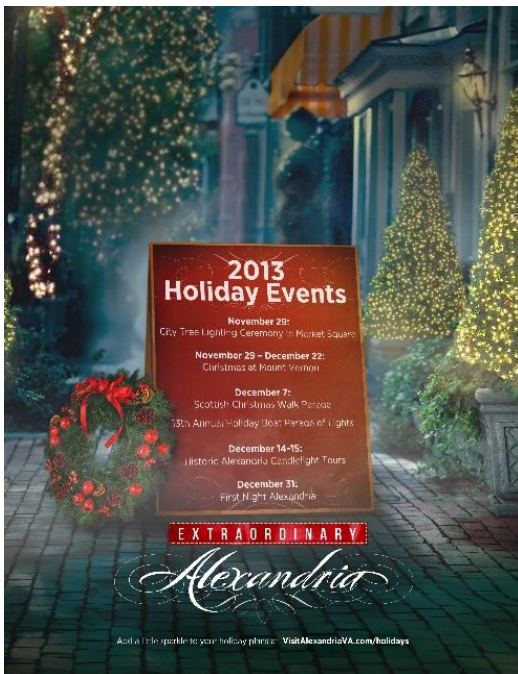
Buy One -

Get 9 Free!

**PRESIDENTS
★ PASSPORT ★**

ALEXANDRIA
MOUNT VERNON
MONTPELIER ★ MONTICELLO
CHARLOTTESVILLE

VISIT MOUNT VERNON, MONTPELIER OR
MONTICELLO AND GET A FREE "KEY TO THE CITY"
PASS TO 9 EXTRAORDINARY SITES & MUSEUMS
IN ALEXANDRIA. LEARN HOW:
VISITALEXANDRIAVA.COM/BOG9.



**2013
Holiday Events**

November 29:
City Tree Lighting Ceremony - Market Square

November 29 - December 22:
Christmas at Mount Vernon

December 7:
Scottish Christmas Walk Parade
33rd Annual Holiday Dash Parade of Lights

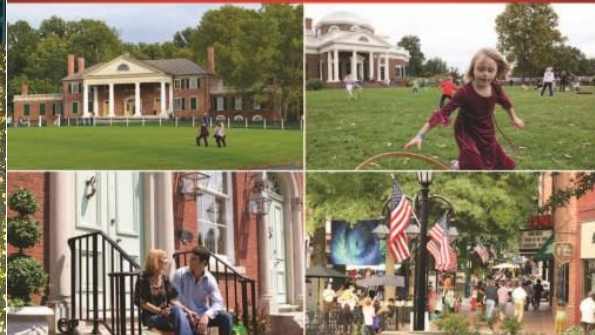
December 14-15:
Historic Alexandria Candlelight Tours

December 31:
First Night Alexandria

EXTRAORDINARY


Alexandria

Add a little sparkle to your holiday plans. Visit VisitAlexandriaVA.com/holidays



EXTRAORDINARY

Alexandria



VIRGINIA
IS FOR
LOVERS

27. During the past 12 months, do you recall having seen any of these advertisements in any magazines or visitors guides?

- Yes
- No
- Maybe / Not Sure

Please scroll down and carefully examine the five (5) print advertisements below. After reviewing these ads please answer the question that follows.





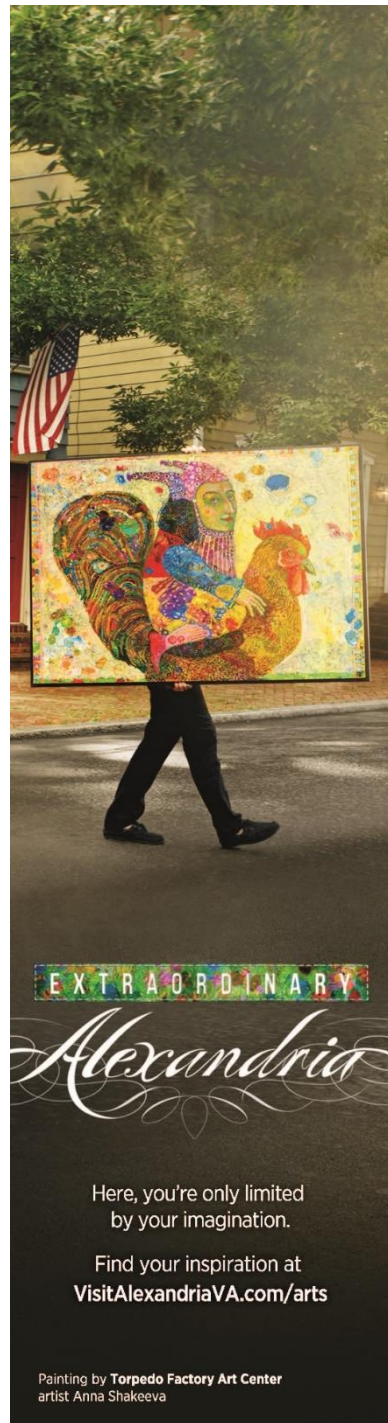
Celebrated chef
Cathal Armstrong
of Restaurant Eye

EXTRAORDINARY

Alexandria

A dash of sophistication. A pinch of passion. A flair for the unexpected.
There's an art to extraordinary dining.

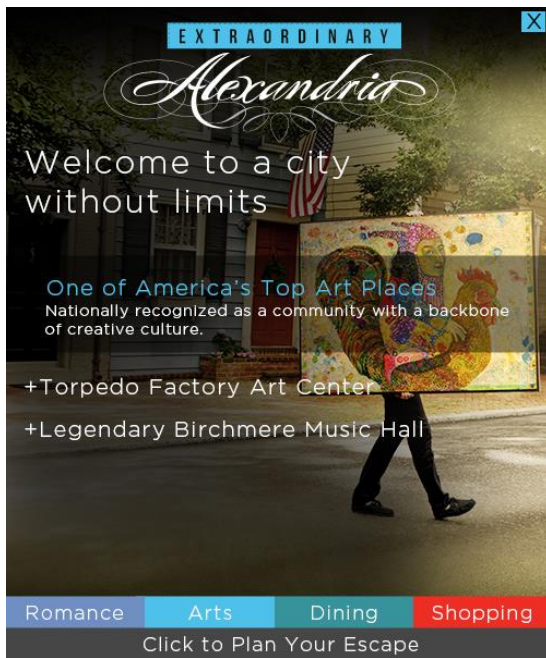
Find your flavor at VisitAlexandriaVA.com/dining.



28. During the past 12 months, do you recall having seen any of these advertisements in any printed newspapers or news weeklies?

- Yes
- No
- Maybe / Not Sure

Please scroll down and carefully examine the ten (10) digital advertisements below. After reviewing these ads, please answer the question that follows.



Welcome to a city without limits

EXTRAORDINARY

Alexandria

Plan your getaway

EXTRAORDINARY

Alexandria

Add a little color to your everyday

Plan your getaway

EXTRAORDINARY

Alexandria

Welcome to a city without limits

Plan your getaway

Welcome to a city without limits

EXTRAORDINARY

Alexandria

Plan your getaway

Welcome to a city without limits

Plan your getaway

EXTRAORDINARY

Alexandria

Let's get carried away

EXTRAORDINARY

Alexandria

Plan your escape

EXTRAORDINARY

Alexandria

Let's get carried away

Plan your escape

29. During the past 12 months, do you recall having seen these advertisements anywhere online?

- Yes
- No
- Maybe / Not Sure

Now please carefully watch each of the five (5) short video advertisements below. After reviewing these ads, please answer the question following.

<iframe width="560" height="315" src="//www.youtube.com/embed/Wo7EILofSv0?rel=0" frameborder="0" allowfullscreen></iframe>

#

<iframe width="560" height="315" src="//www.youtube.com/embed/vL5CD8JcaI8?rel=0" frameborder="0" allowfullscreen></iframe>

#

<iframe width="560" height="315" src="//www.youtube.com/embed/KIHdUPVvTOU?rel=0" frameborder="0" allowfullscreen></iframe>

#

<iframe width="560" height="315" src="//www.youtube.com/embed/jJ7177aZrTM?rel=0" frameborder="0" allowfullscreen></iframe>

#

<iframe width="560" height="315" src="//www.youtube.com/embed/HJ1fPEv6GZg?rel=0" frameborder="0" allowfullscreen></iframe>

#

30. During the past 12 months, do you recall having seen these advertisements anywhere online?

- Yes
- No
- Maybe / Not Sure

Please scroll down and carefully examine the two (2) advertisements below. After reviewing these ads, please answer the question that follows.



31. During the past 12 months, do you recall having seen these advertisement on the DC Metro?

- Yes
- No
- Maybe / Not Sure

32. After viewing this series of advertisements, overall, how effective do you think these advertisements are in portraying Alexandria, VA as a place you would enjoy visiting for leisure reasons?

- Very effective
- Effective
- Neither effective nor ineffective
- Ineffective
- Very ineffective
- No opinion—I don't know

33. Overall, how effective do you think these advertisements are in portraying the following aspects of Alexandria, VA? Please use the five-point scale below where "5" represents "Very effectively" and "1" represents "Very ineffectively."

The advertisements portray this aspect of Alexandria...

	Very effectively (5)	Effectively (4)	Neither effectively nor ineffectively (3)	Ineffectively (2)	Very ineffectively (1)
A good destination for a weekend getaway	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
A place with lots to see and do	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
A place that offers a unique travel experience	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
A good place for a family vacation	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
A good place to visit for a business meeting, conference or convention	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
A place with an exciting food and dining scene	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
A place with a vibrant arts & cultural scene	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
An authentic place	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
A place with unique shopping	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
A historical place	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
A romantic place	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
A modern/contemporary city	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
A place to unwind	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
A getaway destination that is a good value for the money	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

34. How did the advertisements you viewed today affect your likelihood to visit Alexandria, VA for leisure in the next 12 months?

- I'm more likely to visit Alexandria, VA for leisure in the next 12 months.
- Unchanged. I am not more or less likely to visit Alexandria, VA for leisure in the next 12 months.
- I'm less likely to visit Alexandria, VA for leisure in the next 12 months.

- I don't know.
35. You said that you recall seeing one or more of the Alexandria, VA tourism ads that you reviewed earlier in the survey. Did this ad (or ads) you saw in any way influence your decision to visit Alexandria, VA?
- Yes
 No
36. When you saw the advertisement(s) for Alexandria, VA, where were you in the process of deciding to travel? Please select the one option that best describes where you were in your travel decision.
- I had already decided to visit Alexandria, VA
 I was interested in visiting Alexandria, VA but hadn't made travel plans yet
 I was just considering destinations for a trip
 I had no plans to travel
37. In the past 12 months, do you recall seeing any articles in newspapers or magazines—either printed or online—that made you want to visit Alexandria, VA?
- Yes
 No
 Maybe / Not Sure
38. In the past 12 months, do you recall seeing any features on blogs or elsewhere online that made you want to visit Alexandria, VA?
- Yes
 No
 Maybe / Not Sure
39. In the past 12 months, do you recall seeing any stories or features on television that made you want to visit Alexandria, VA?
- Yes
 No
 Maybe / Not Sure
40. How likely are you to recommend Alexandria, VA as a place to visit to family members, friends and/or colleagues?
- Very likely
 Likely
 Somewhat likely
 Somewhat unlikely
 Very unlikely

The following information will only be used to create group profiles. No personally identifiable information is requested.

41. What is your gender? (Select one)
- Male
 Female
 I prefer not to answer
42. Which best describes your age? (Select one)
- Under 21
 21 to 34
 35 to 44
 45 to 54
 55 to 64
 65 to 74

- 75 or above
- I prefer not to answer

43. Which best describes your current employment status? (Select one)

- Employed full-time
- Employed part-time
- Self-employed
- Not currently employed / retired
- I prefer not to answer

44.

Which best represents the highest level of formal education you have completed? (Select one)

- Some high school or less
- High school graduate
- Attended some college
- Associate's degree
- Bachelor's degree
- Some graduate school
- Graduate degree
- I prefer not to answer

45. Which best describes the combined annual income of all members of your household? (Select one)

- Less than \$25,000
- \$25,000 but less than \$50,000
- \$50,000 but less than \$75,000
- \$75,000 but less than \$100,000
- \$100,000 but less than \$125,000
- \$125,000 but less than \$150,000
- \$150,000 but less than \$200,000
- \$200,000 or more
- I prefer not to answer

46. Which of the following describes your race or ethnic background?

- White/Caucasian
- Black/African-American
- Hispanic/Latino
- Asian/Pacific Islander
- Other
- I prefer not to answer

47. Which best describes your marital status? (Select one)

- Single
- Single with children under age 18
- Married/Partnered
- Married/Partnered with children under age 18
- Other
- I prefer not to answer

Thank you very much for your help. Please click the "Submit Survey" button below to send your responses.