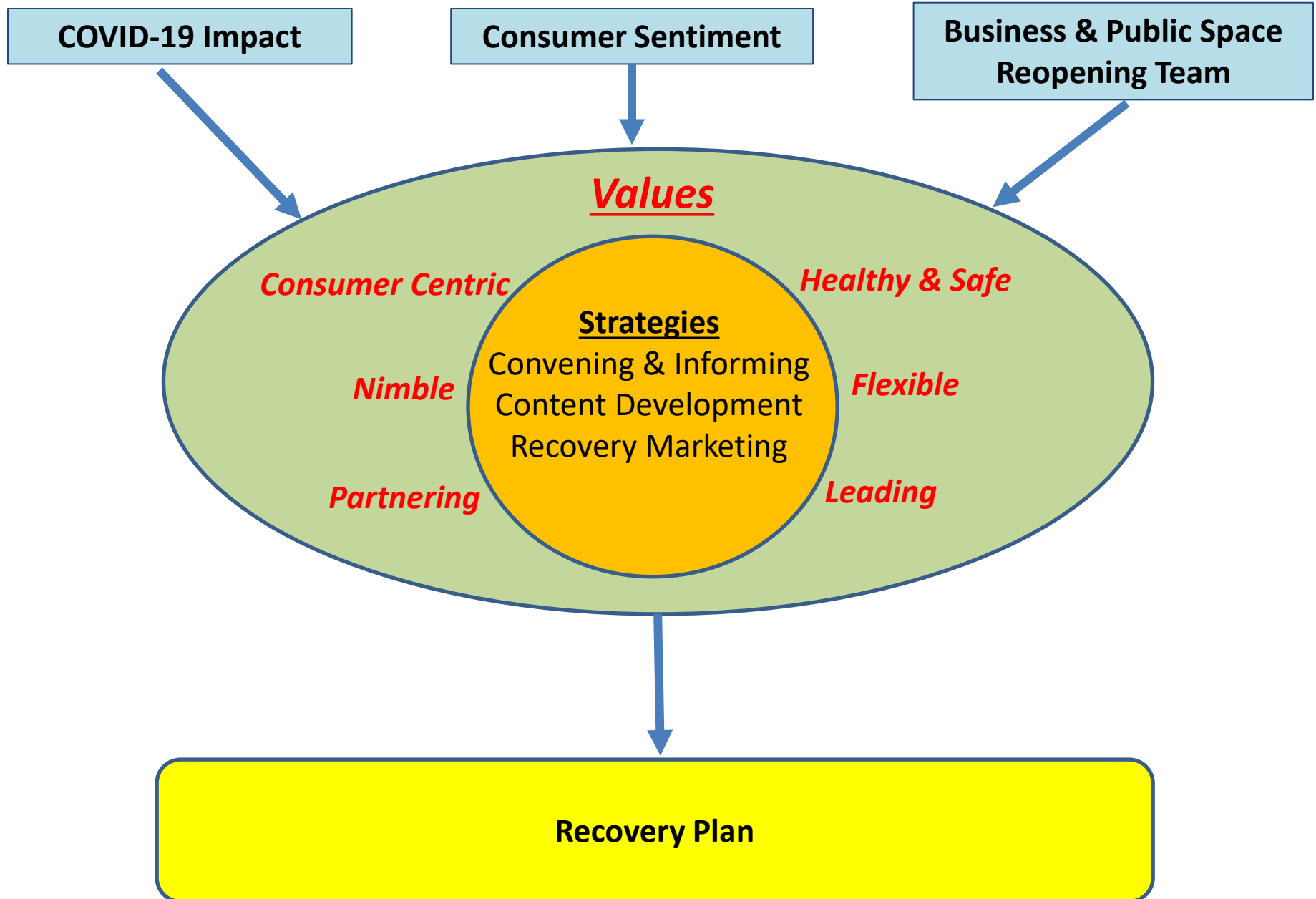




FY 2021 Recovery Plan

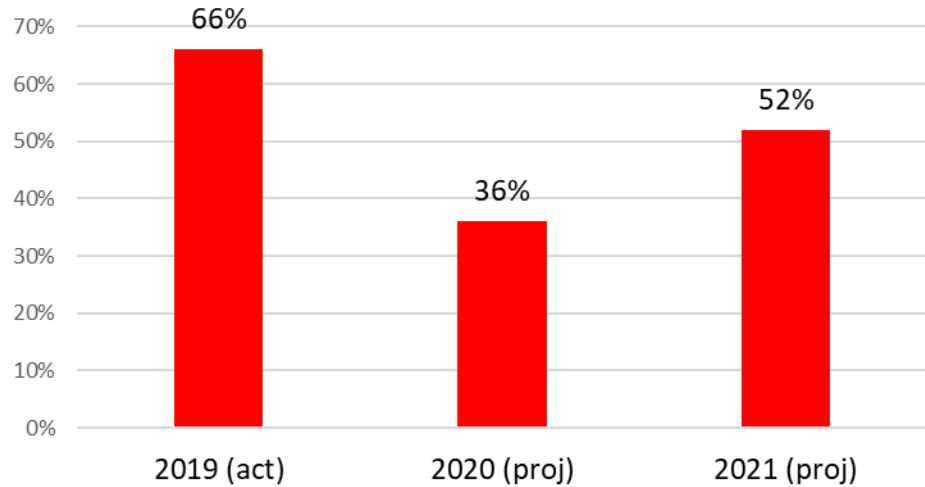
Visit Alexandria Board Meeting
May 18, 2020

Recovery Framework

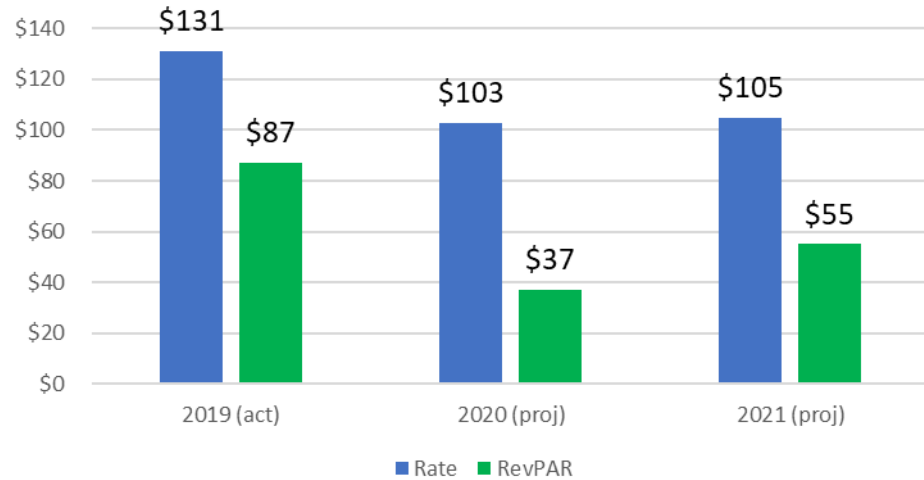


STR National Hotel Forecast

Occupancy



Rate & RevPAR

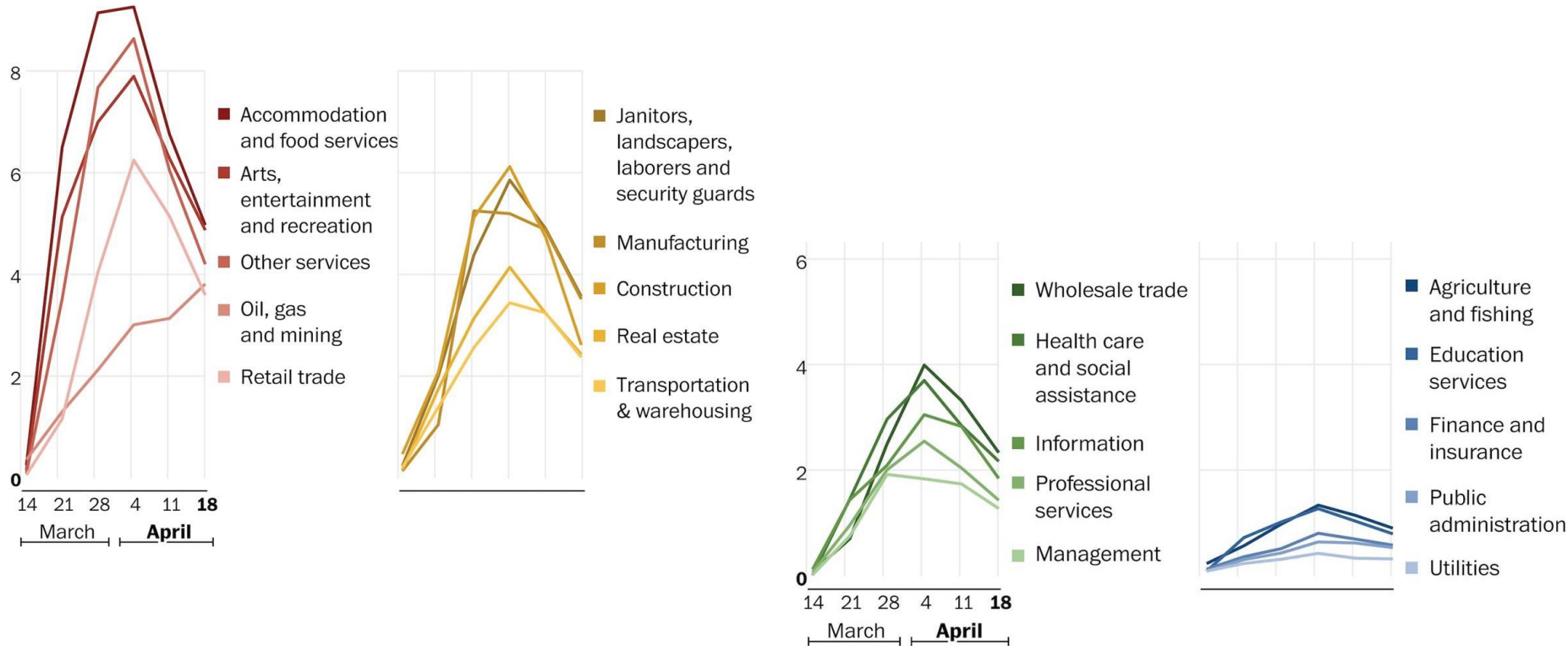


Source: STR Forecast, May, 2020

Unemployment by Industry

Jobless claims as a share of industry employment

Split into four charts because they don't all fit on one

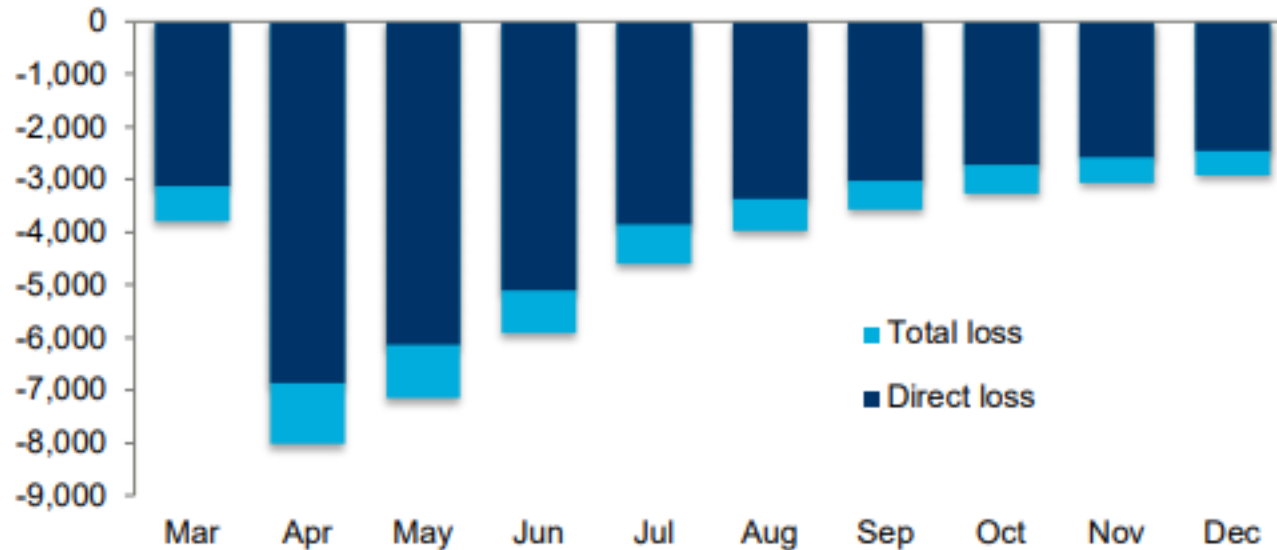


Note: Based on data from Alabama, Kansas, Massachusetts, Maine, Michigan, Minnesota, Iowa, Nebraska, North Dakota, Nevada, New York, Oregon, Georgia, Texas and Washington; construction includes New York utility workers, since the numbers aren't reported separately.

Source: State unemployment offices and the Labor Department via the Economic Policy Institute
THE WASHINGTON POST

2020 Employment Outlook

Tourism industry job loss
Thousands

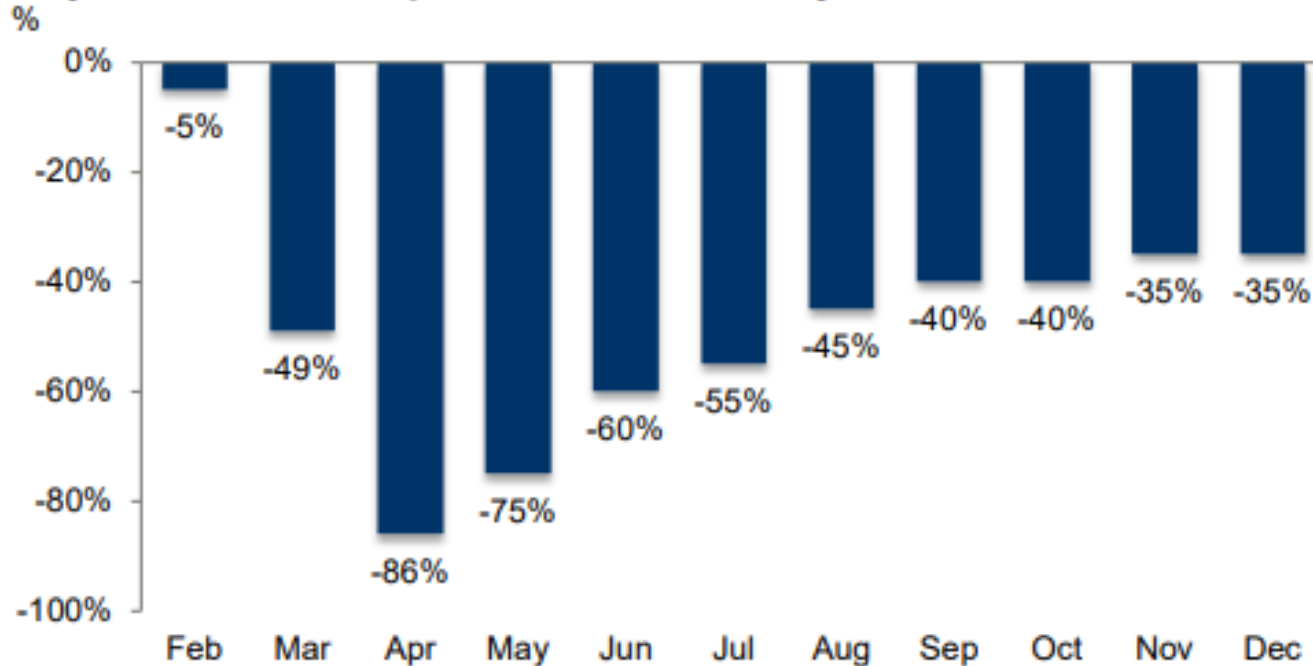


Source: Oxford Economics

Oxford Economics expects a 24 million job loss in April, implying that travel-related jobs will comprise one-third of this decline.

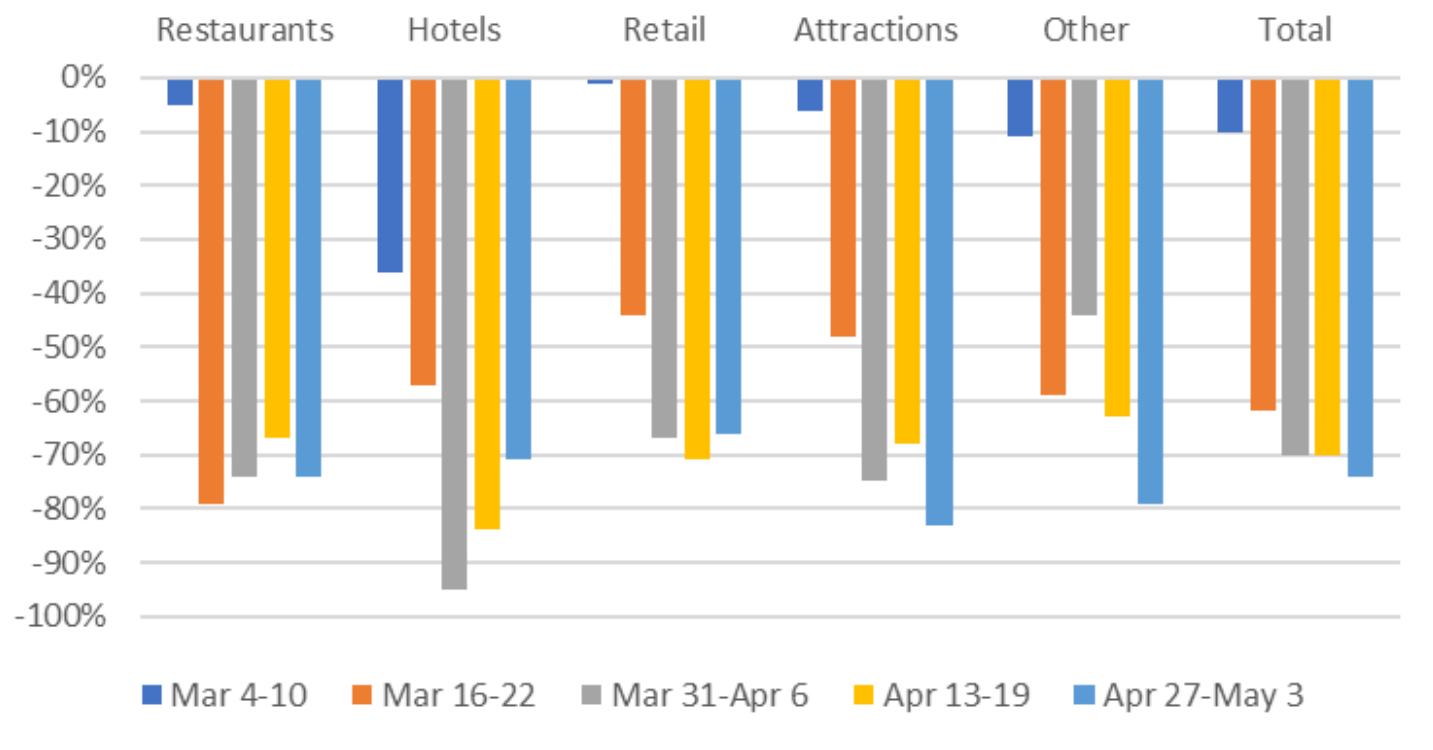
2020 US Tourism Revenue Outlook

Projected COVID-19 impact on tourism industry revenue



Source: Oxford Economics

Alexandria Business Impact Survey

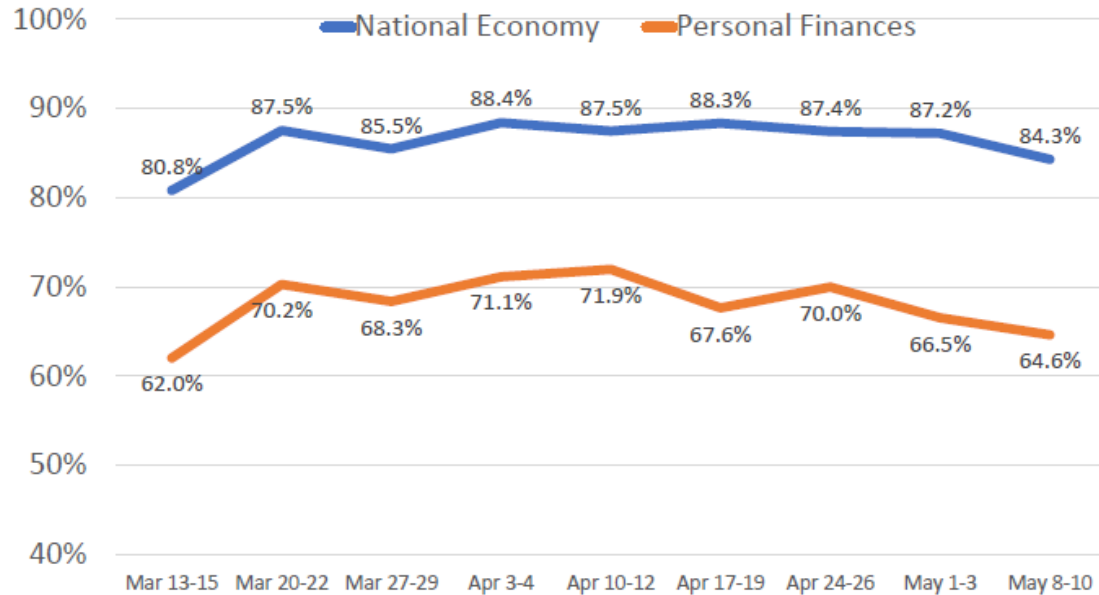


	Mar 4-10	Mar 16-22	Mar 31-Apr 6	Apr 13-19	Apr 27-May 3
Restaurants	-5%	-79%	-74%	-67%	-74%
Hotels	-36%	-57%	-95%	-84%	-71%
Retail	-1%	-44%	-67%	-71%	-66%
Attractions	-6%	-48%	-75%	-68%	-83%
Other	-11%	-59%	-44%	-63%	-79%
Total	-10%	-62%	-70%	-70%	-74%

Consumer Sentiment

Money Concerns

(% answering 10-6 on 11-point scale)

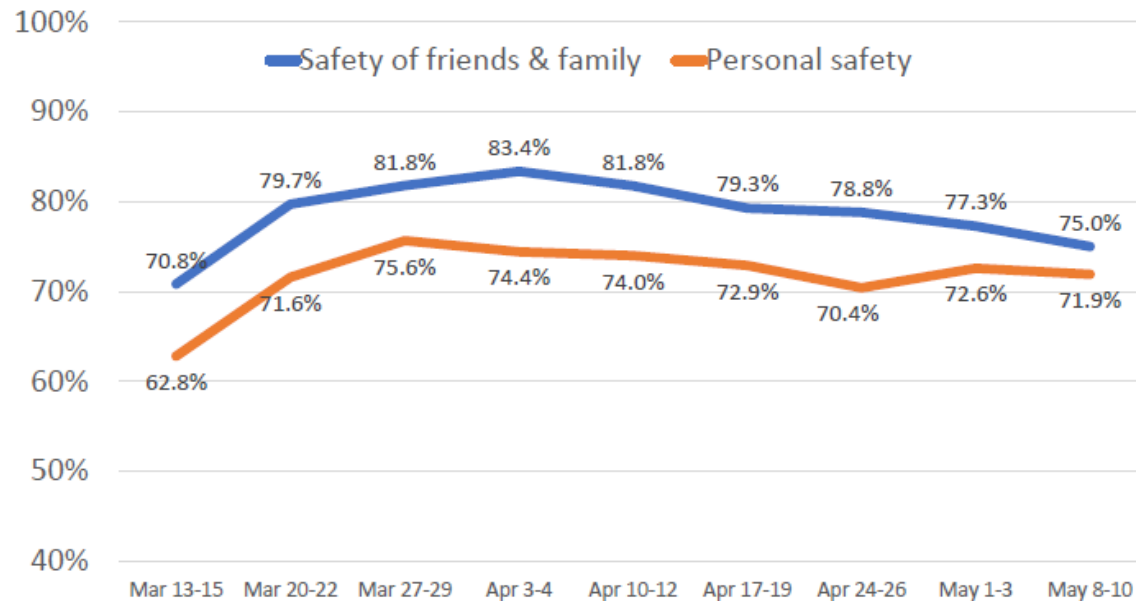


Question: Thinking about the current coronavirus situation, how concerned are you about the impact it may have on the NATIONAL ECONOMY? **Question:** Thinking about the current coronavirus situation, how concerned are you about the impact it may have on your PERSONAL FINANCES?

Source: Destination Analysts

Safety Concerns

(% answering 10-6 on 11-point scale)



Question: Thinking about the current coronavirus situation, in general, HOW CONCERNED ARE YOU PERSONALLY about contracting the virus? **Question:** Thinking about the current coronavirus situation, in general, how concerned are you about your FRIENDS OR FAMILY contracting the virus?

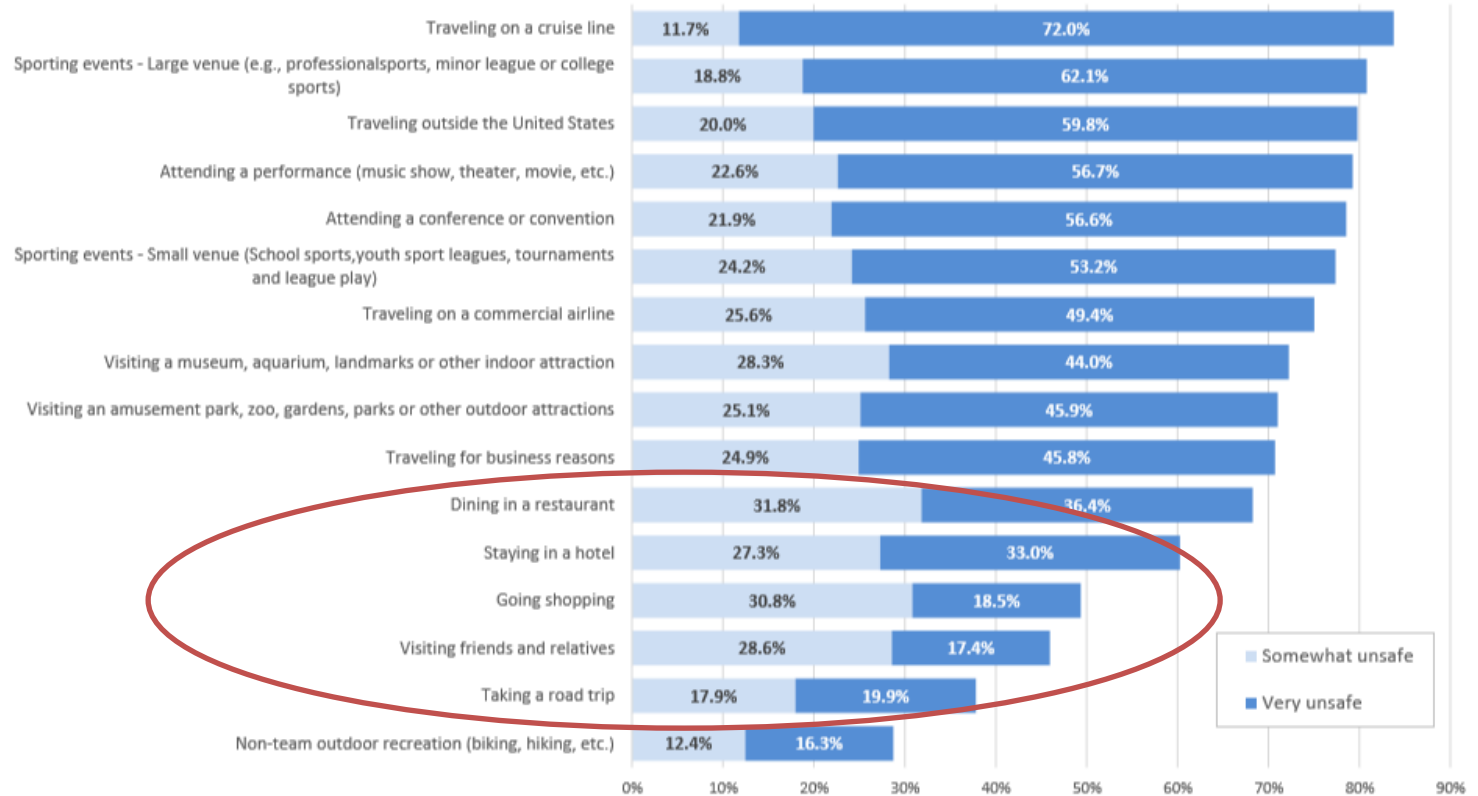
Source: Destination Analysts

What Feels Safe?

Wave 6 (Collected April 17-19)

Question: At this moment, how safe would you feel doing each type of travel activity?

(Base: Wave 6 data. All respondents, 1,238 completed surveys. Data collected April 17-19, 2020)



Source: Destination Analysts

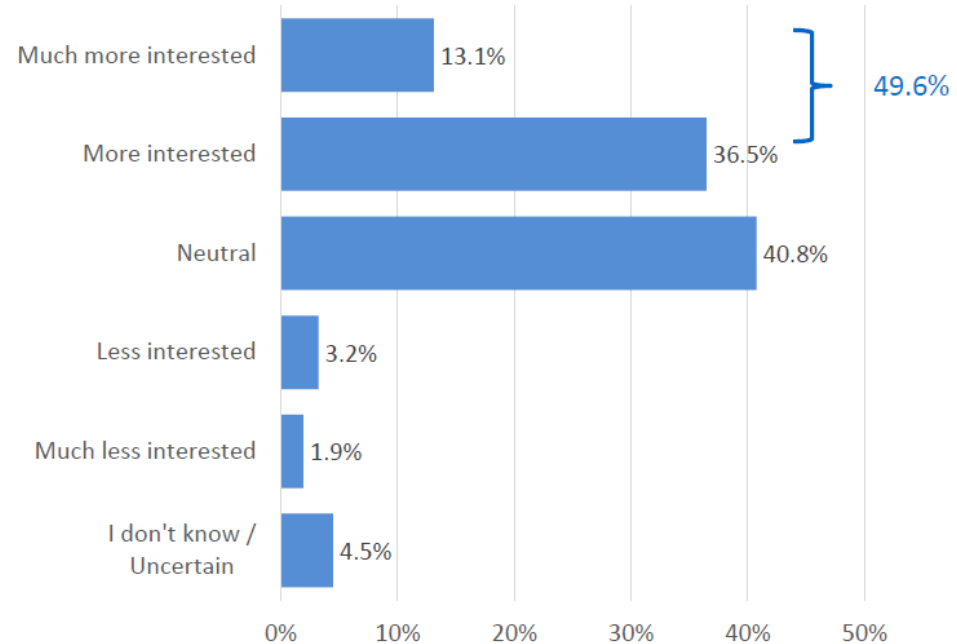
Safety Guidelines Impact

Question: All else equal, if a business such as a hotel, attraction or restaurant stated that they follow health & safety guidelines to prevent the transmission of viruses issued by their state government, how would that affect your interest in visiting?

I would be _____

(Base: All respondents, 1,200 completed surveys. Data collected May 8-10, 2020)

Question Added in Wave 9



Source: Destination Analysts

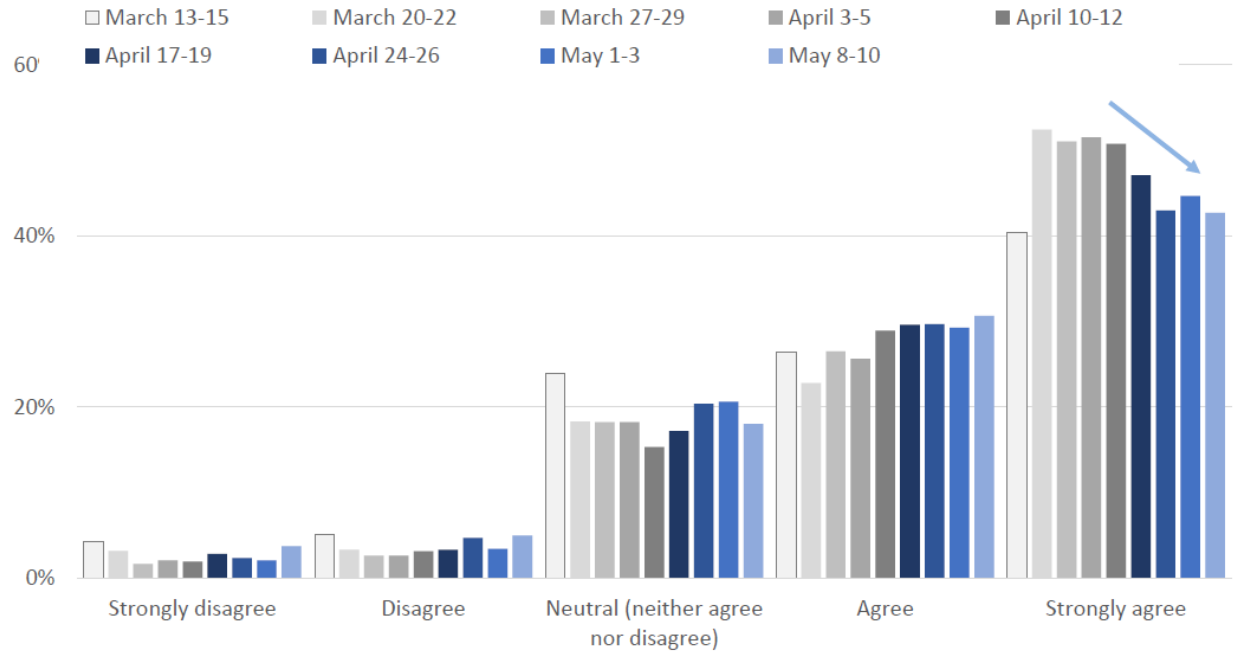
Conference Outlook

Avoiding Conventions & Conferences

How much do you agree with the following statement?

Statement: I will be unlikely to attend any conferences or conventions until the coronavirus situation is resolved.

(Base: All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238, 1,208, 1,204 and 1,200 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5, 10-12, 17-19, 24-26, May 1-3 and 8-10, 2020)

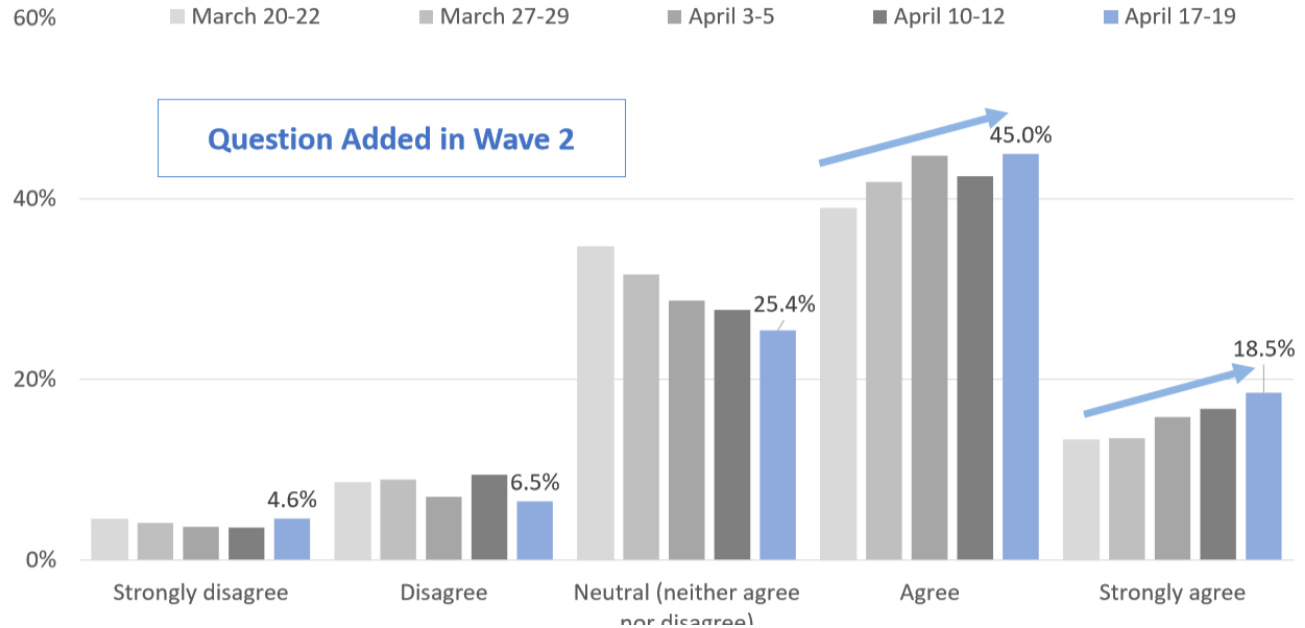


Supporting Local

How much do you agree with the following statement?

Statement: I have been taking action to try to support local businesses where I live.

(Base: All respondents, 1,200, 1,201, 1,216, 1,263 and 1,238 completed surveys. Data collected March 20-22, 27-29 and April 3-5, 10-12 and 17-19, 2020)



Source: Destination Analysts

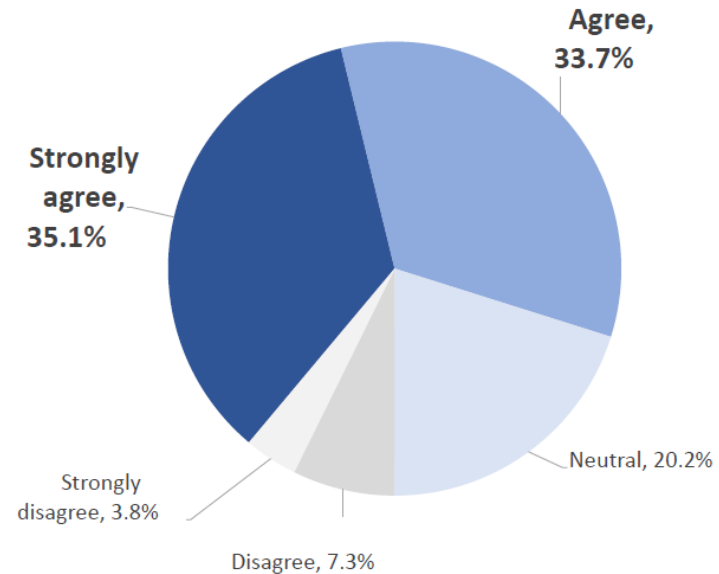
Travel Interest

Excitement to Get Back to Travel

How much do you agree with the following statement?

Question: I miss traveling. I can't wait to get out and travel again.

(Base: All respondents, 1,201, 1,216, 1,263, 1,238, 1,208, 1,204 and 1,200 completed surveys. Data collected March 27-29, April 3-5, 10-12, 17-19, 24-26, May 1-3 and 8-10, 2020)



Re-Entry

In the period after coronavirus, how are you going to approach getting back into travel?



47.1%

I'll get back in but carefully



41.7%

I'll test the waters first



11.2%

I'll jump right back in

First Activities

What They Most Want to Do After SIP

Question: What are the first things you are going to do when shelter-in-place restrictions are lifted? (Select as many as FIVE)

(Base: Wave 6. All respondents, 1,238 completed surveys. Data collected April 17-19, 2020)

New Question Added in Wave 6

What are the first things you are going to do when shelter-in-place restrictions are lifted?



Dine out with friends
(40.9%)



Hang out with friends
(39.6%)



Grooming services
(37.2%)



Go shopping
(35.6%)



Go on a trip
(22.5%)



Go to a movie, play
or theater (21.5%)



Go to the gym (20.1%)



Go on a date (15.6%)



Hike (14.5%)



Bars/nightclubs (12.4%)

Get a massage or
spa treatment
(11.6%)

Gambling
in a casino
(8.9%)

Go to a
theme park
(7.7%)

Go to a
museum
(5.7%)

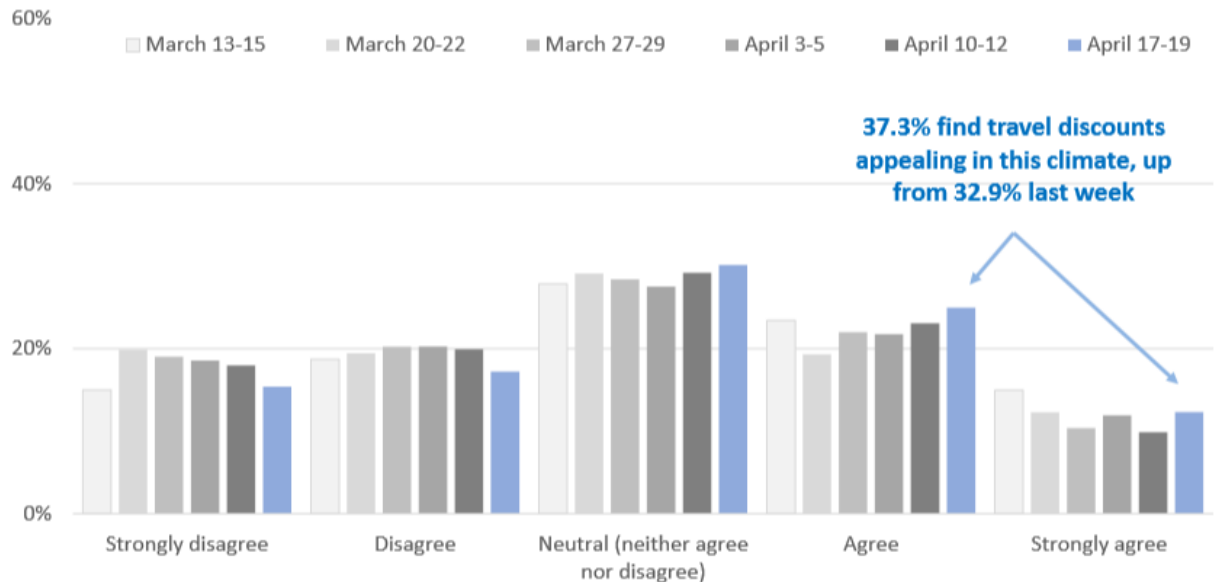
Pricing as a Motivator

Discounts and Price Cuts

How much do you agree with the following statement?

Statement: The coronavirus has led many travel providers to cut their prices. These discounts and price cuts (airline, hotel, etc.) make me more interested in traveling in the NEXT THREE (3) MONTHS.

(Base: All respondents, 1,201, 1,200, 1,201, 1,216, 1,263 1,238 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5, 10-12 and 17-19, 2020)

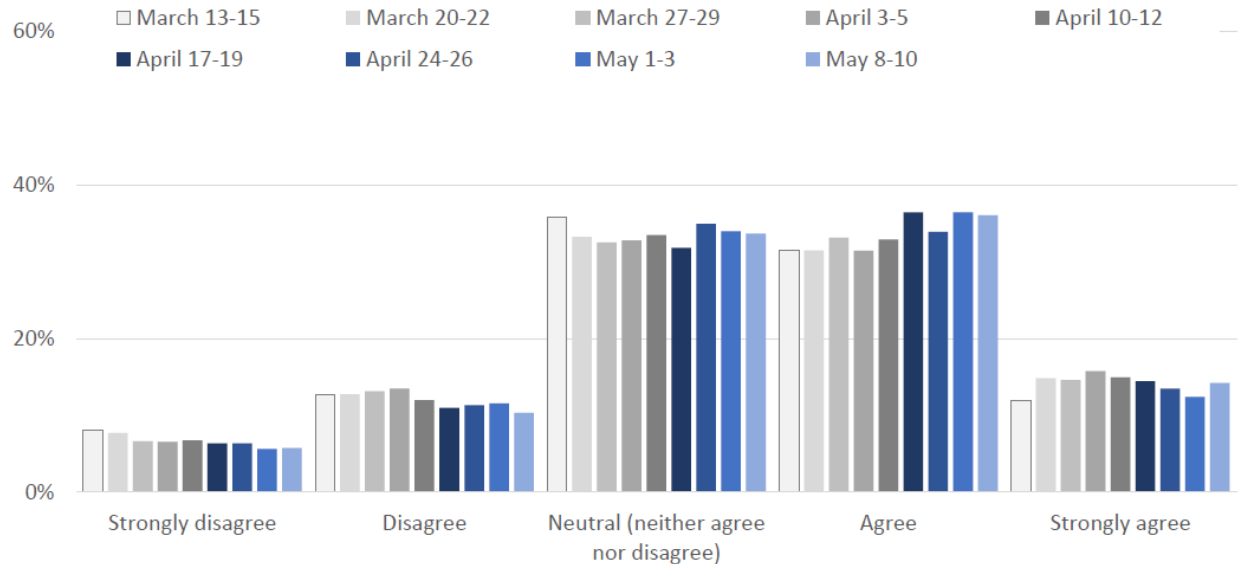


Shift to Regional Travel

How much do you agree with the following statement?

Statement: Because of the coronavirus, I'll probably be taking more regional trips (near my home) and avoid long-haul travel (further from home).

(Base: All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238, 1,208, 1,204 and 1,200 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5, 10-12, 17-19, 24-26, May 1-3 and 8-10, 2020)



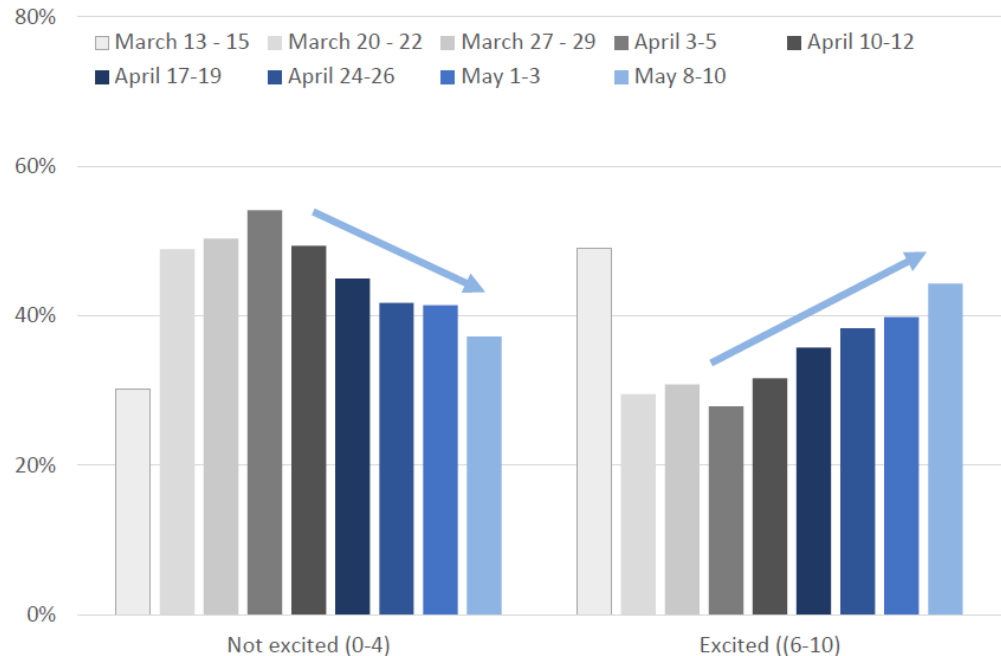
Weekend Getaway Next 30 Days

Excitement to Travel Now (Excited vs. Not Excited)

Question: Imagine that a good friend (or close family member) asks you to take a weekend getaway with them sometime in the next month.

How excited would you be to go? (Assume the getaway is to a place you want to visit)

(Base: All respondents, 1,201, 1,200, 1,201, 1,216, 1,263, 1,238, 1,208, 1,204 and 1,200 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5, 10-12, 17-19, 24-26, May 1-3 and 8-10, 2020)

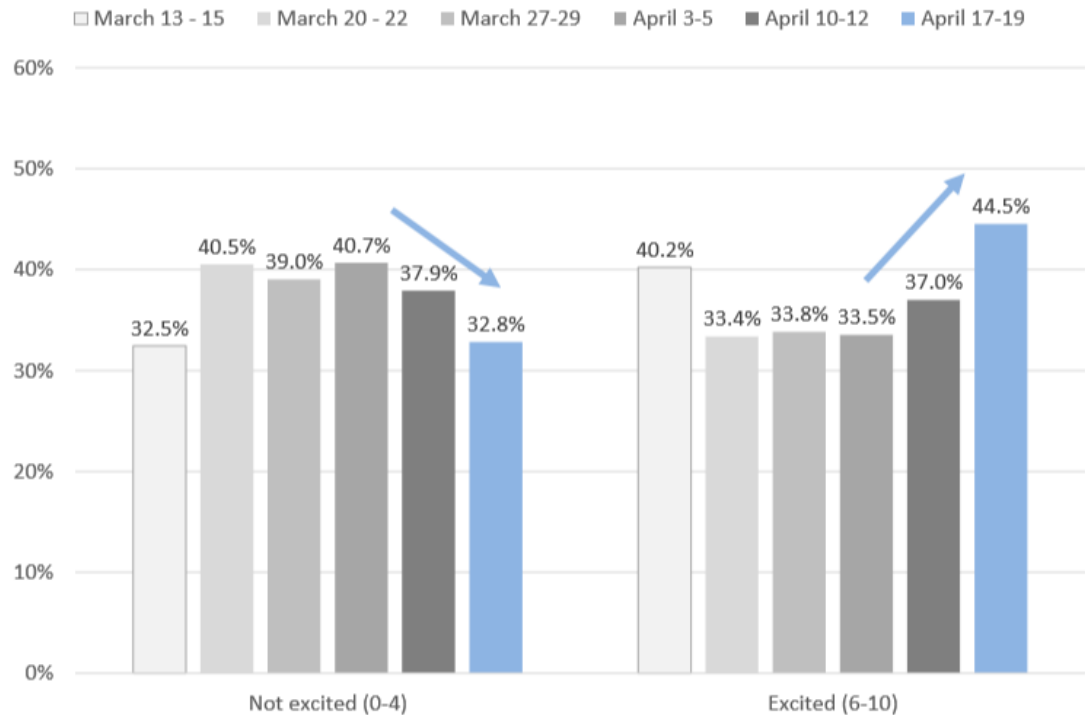


Ready to Receive

Openness to Travel Information (Excited vs. Not Excited)

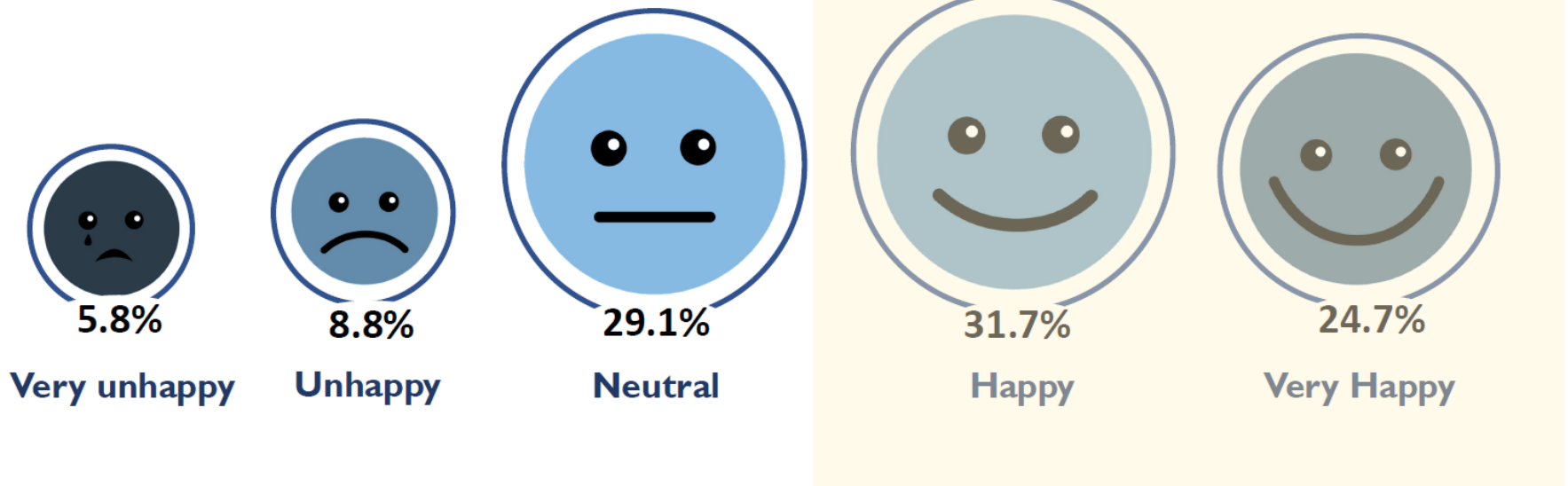
Question: At this moment, how excited are you in learning about new, exciting travel experiences or destinations to visit?

(Base: All respondents, 1,201, 1,200, 1,201, 1,216, 1,263 1,238 completed surveys. Data collected March 13-15, 20-22, 27-29, April 3-5, 10-12 and 17-19, 2020)



Ready to Receive

**Please think about the most recent travel destination ad you saw.
In general, how did that advertisement make you feel?**



(Base: All respondents, 1,200 completed surveys. Data collected May 8-10, 2020)

Our Approach: Market Prioritization

Approach: Market Prioritization

	Local	Regional	Drive	Fly
Couples/Friends				
Families				
Meetings				

Market Prioritization

Questions for each market combination

1. What is the **consumer mindset**?
2. How can **travel** fill that need?
3. Why is Alexandria **unique** in filling that need?
4. What **offer** (if any) do we need to reach this market?
5. **When** do we need to deliver the message?
6. What are the right **media** to deliver it?

Stages of Implementation

Determined by government policy and consumer sentiment, not calendar/linear



Recovery Strategies

ALX Promise Program

Safety Standards & Messaging:

- Work with Business & Public Space Reopening Team and Health Department to establish clear set of safety standards, business pledge and training
- Communicate safety commitment to public with friendly & fun tone
- Provide on-site branding for businesses who adopt safety standards
- Offer branding for member use and on web site listings



Drive Market Emphasis

Geography:

- 3-hour radius* to start
- Virginia, Maryland, DC Metro, Pennsylvania, Delaware
- Expand outward over time

Message:

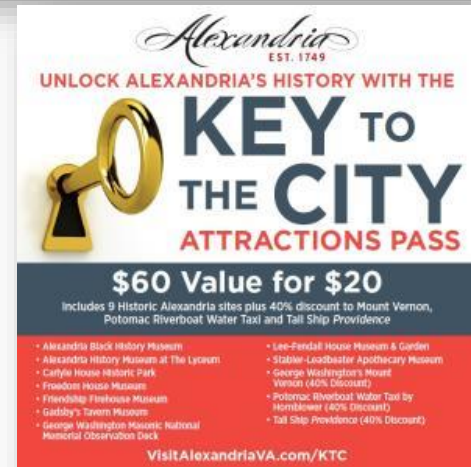
- #3 Best Small City in U.S.
- Getaway
- Historic charm
- Driveable
- Value
- Flexibility
- Safety Standards



Flex Getaway Hotel Package

Offer:

- Starting at \$69/night
- Fully flexible
- Stay 2 nights or more and get up to \$120 in added values:
 - Free Overnight Parking
 - 2 Key to the City Attractions Passes
- Valid through Dec. 31, 2020
- Perfect for visiting friends/family



Content Strategy

ALX at Home (launched March 16):

- Web hub to support local business during social distancing
- 200+ ways to support small businesses
- 100+ restaurants, 50+ boutiques, 11 attractions, 6 arts organizations

ALX at Home Results (through May 11):

- 3.7 million marketing impressions
- 100 press hits
- 166,000 pageviews on ALX at Home landing pages
- 110,000 pageviews on member listings



Content Strategy



Phased Promotion of In-Person Experiences:

- Safety pledge program
- Leverage friends/family travel
- Things to Do Now page and weekend itinerary
- Only in ALX
- Launch of themed trails and walks: sweets, boutiques, brewers, architecture
- Paid advertising, media relations and social media continue



Beginners' Guide to Old Town Architecture

[Learn More >](#)



Explore Art Deco Architecture in Del Ray

[Learn More >](#)



These 6 Alexandria Architectural Gems Will Make You Swoon


[Learn More >](#)

VISIT
Alexandria

Meetings & Group Sales

Key Strategies:

- Small meetings focus
- Trends: Regional, cost-effective, hybrid
- Themes: United community, flexibility and safety
- Message: #3 Best Small City in your backyard
- Benefits: Full-service planning, destination attributes
- Key Targets:
 - Major 3 third-party planning companies
 - Domestic tour operators and weddings
 - DMV, Financial, Health Care
- Value Added: ALX Extra Perks and ALX Insider Perks
- Leadership Collection: “From Survive to Thrive”

A collage of four images: a street scene with trees and buildings, a group of people in a meeting room, a person working at a computer, and a view of the city skyline.

1 Founding Father
3 Leadership Programs
+ 23 Meeting Venues
200 Restaurants & Shops
271 Years of History

COUNTLESS POSSIBILITIES

On the Potomac River within eyesight of Washington D.C. and just 10 minutes from Reagan National Airport, you'll find Alexandria, Virginia and its walkable, nationally designated historic district that George Washington once called home—and a surprisingly distinctive setting for executive to mid-sized meetings.

Choose from meeting facilities ranging from four-star boutiques to a full-service convention hotel to the nationally recognized institutes of The Leadership Collection at Alexandria®. And with our complimentary concierge service—helping you plan everything from memorable off-site activities to unique after-hour experiences—the only thing you'll need to plan for is taking credit for an unforgettable meeting.

Contact our team of destination experts and plan to be inspired.

#3 BEST SMALL CITY
IN THE U.S. 2019
Condé Nast Traveler Readers' Choice Awards

Alexandria
EST. 1749

MeetAlexandriaVA.com | (703) 652-5369

5 miles to Washington, D.C./3 miles to the Ronald Reagan National Airport/4 Metrorail stations

VISIT
Alexandria

Connecting and Informing

Key Strategies:

- Industry specific webinars
- Virtual membership meetings
- Leadership Collection recovery webinar
- Research roundups
- Business impact surveys
- Member/partner updates



Visitor & Member Services

Key Strategies:

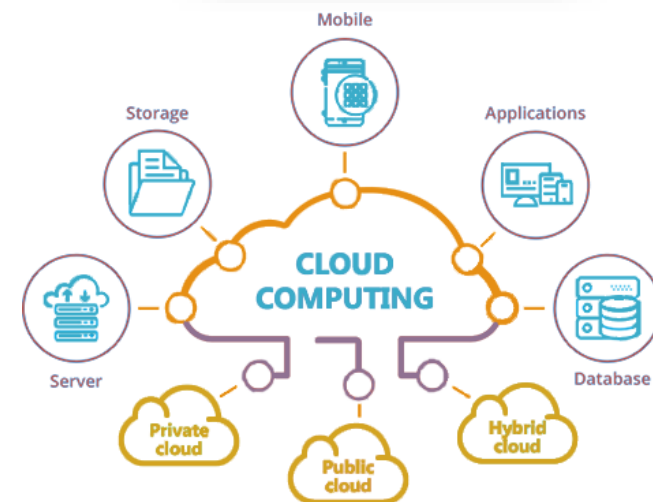
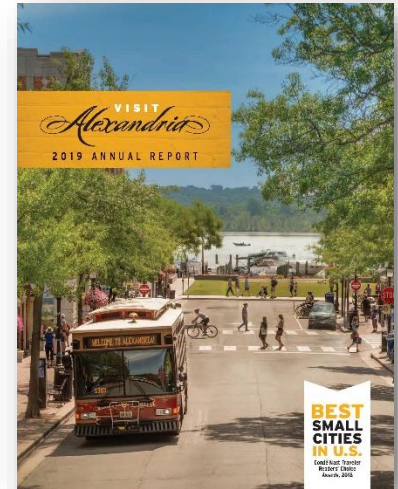
- Reopen June 11 with adapted space
- Ongoing updates of businesses and attractions open/closed
- 2021-22 Visitor Guide w/new vendor
- 50% Dues Relief Plan



Finance & Operations

Key Strategies:

- Neutral budget over two years
- \$170K of FY 20 media buy → FY 21
- Ongoing budget adjustments with City
- Wage & hiring freeze
- Blend telework and office adaptation
- Cloud server and full remote access
- Office move planning, with lease expiration in October 2021



Recovery Framework

COVID 19 Impact

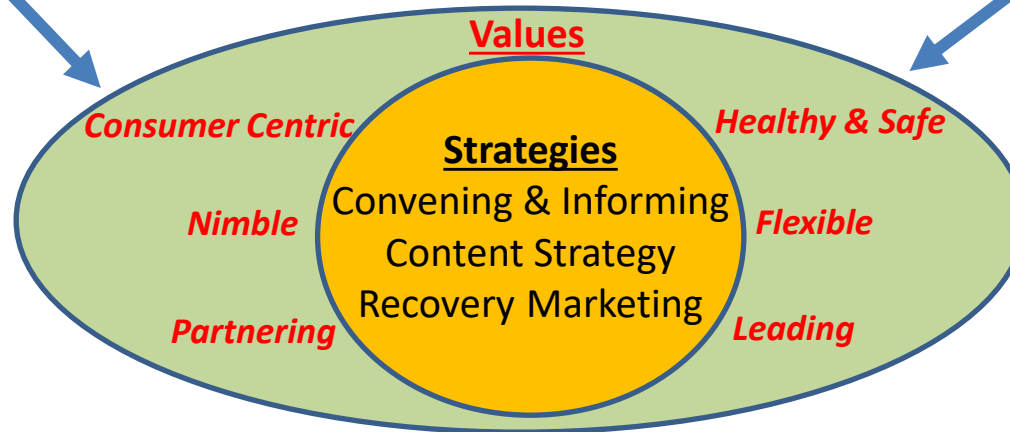
- Nationally
- Statewide
- Locally

Consumer Sentiment

- Safety
- Flexibility
- Personal Finances
- Buy Local
- Pent-Up Travel Demand

Stages of Reopening:

1. Stay-At-Home
2. Safer-At-Home
3. Travel Permitted
4. Comfortable, but Cautious
5. Relatively Open

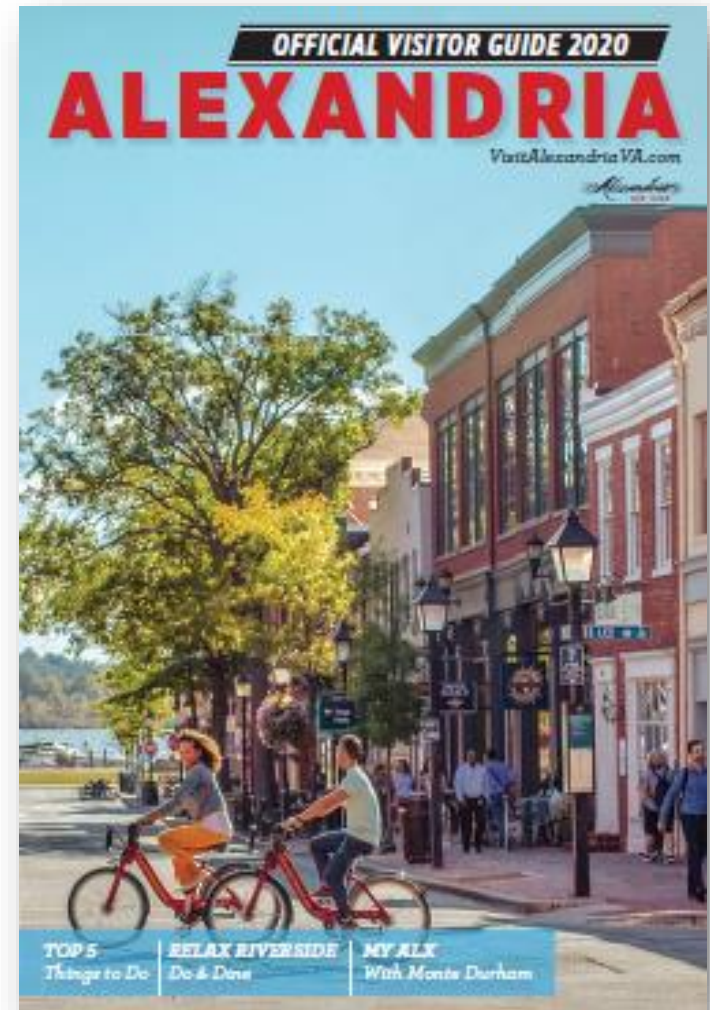


Plan Highlights:

- Reassuring Safety
- Drive Market
- Flex Getaway Package
- ALX At Home
- Only in ALX
- Trails
- Small Meetings
- Virtual Capability
- Dues Relief
- Office Relocation

Comments/Questions?

- _____
- _____
- _____
- _____
- _____
- _____
- _____
- _____



Thank You!

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Alexandria

VisitAlexandriaVA.com | #VisitALX

