



VISIT
alexandria

Alexandria Hotel
Association Meeting

August 5, 2025

Agenda

- 1. Introduction & Welcome** – Kate & Todd
- 2. Around-the-Table Introductions**
- 3. Visit Alexandria Strategic Plan** - Todd
- 4. Membership Updates** - Melanie
- 5. Marketing & Communications Updates** - Claire
- 6. Sales Team Welcome** - Suzanne
 - Meet the Sales Team
 - How We Work Together
- 7. Research Update** – Vito
- 8. Your 2025/2026 Priorities and Updates**
 - Your Hotel Updates
 - What's Working Well
 - New Opportunities for Alexandria
 - Risks to Mitigate
 - Advocacy Needs





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Visit Alexandria

Five Year Strategic Plan

June 2025

Stakeholder Engagement

- 12 in-depth interviews
- 4 focus groups
- 115 respondents to DestinationNEXT assessment



Questions:

1. What are the biggest opportunities for Alexandria in the next 3 years?
2. What are the most critical issues facing the destination?
3. What suggestions do you have for Visit Alexandria?

Strategic Goals



Sales & Marketing



Targets:	Strategic Initiatives	Lead	FY26	FY27	FY28	FY29	FY30
<ul style="list-style-type: none"> Visitor spending >\$1 billion by FY27 Consumption taxes >\$100 million by FY29 Create co-op marketing opportunities for members by FY27 	a) Redefine and develop target audiences aligned with destination attributes	Claire					
	b) Increase marketing & PR impact by expanding storytelling and strengthening key messages aligned with brand pillars	Claire					
	c) Maintain and incrementally grow our market share of business & leisure	Claire					
	d) Develop and execute a technology strategy to maintain and expand Alexandria's digital brand presence and enhance the customer experience	Vito					

Destination Management



Targets:	Strategic Initiatives	Lead	FY26	FY27	FY28	FY29	FY30
<ul style="list-style-type: none"> 200 frontline employees through hospitality training program by end of FY28 	a) Develop a hospitality training program for frontline employees	Melanie					
	b) Advocate for the development of a multi-purpose group space	Todd					
<ul style="list-style-type: none"> Tourism Master Plan developed by end of FY29 	c) Lead the development of a Tourism Master Plan	Todd					
<ul style="list-style-type: none"> Have at least 50 unique visitor experiences to offer by end of FY30 	d) Develop a strategy to address need periods	Vito					
	e) Develop strategy to unearth existing and create new visitor experiences	Melanie					

Destination Alignment



Targets:	Strategic Initiatives	Lead	FY26	FY27	FY28	FY29	FY30
<ul style="list-style-type: none"> Roll out destination brand by end of FY28 	a) Lead the development of a comprehensive destination brand for Alexandria	Claire					
<ul style="list-style-type: none"> Grow membership revenue 50% by FY30 	b) Refresh membership benefits	Melanie					
<ul style="list-style-type: none"> Redefine event support plan by end of FY27 	c) Work with partners to determine an appropriate structure to produce local events	Todd					
<ul style="list-style-type: none"> Re-home major event production (ie: parades) by end of FY26 	d) Incorporate direct community feedback in organizational planning	Mary					

Organizational Sustainability



Targets:	Strategic Initiatives	Lead	FY26	FY27	FY28	FY29	FY30
<ul style="list-style-type: none"> Grow Visit Alexandria annual budget to \$7M by FY30 	a) Advocate for financial sustainability and growth	Board					
	b) Undertake comprehensive review of Board bylaws	Board					
<ul style="list-style-type: none"> Evaluate tourism improvement district (TID) feasibility by end of FY27 	c) Attract and retain organizational talent	Mary					
	d) Pursue external sources of sustainable revenue for the organization	Todd					
	e) Evaluate and ensure appropriate organizational structure to achieve goals	Mary					

- Member Survey
- Visitor Guide Listings
- Annual Meeting



Membership

**Melanie Fallon,
VP of Member &
Visitor Services**





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Marketing &
Communications
Update

Hotel Meeting

August 5, 2025

Claire Mouledoux

SVP of Marketing &
Communications



Alexandria voted a
Top 5 Best City in the U.S.



Marketing & Communications

- Maximize benefit of **high-level strategic integration of internal team and agency partners**, including new agency of record, 62Above
- Develop **new, integrated destination marketing campaign** to launch early 2026
- **Redefine and develop target audiences** (including niche audiences)
- **Identify key need periods** throughout the year, and **create promotions** to help spur visitation



Marketing & Communications



- Increase **emphasis on conversion** vs. impressions
- Increase marketing & PR impact by **expanding storytelling** of small businesses, neighborhoods and more
- Elevate awareness of Alexandria's **small meetings scene**
 - Develop meetings storylines and content
 - Refresh the meetings section of our website
 - Dedicated media outreach with our PR agency



Late Summer Strategy

Conversion strategy, focusing on short-lead bookings

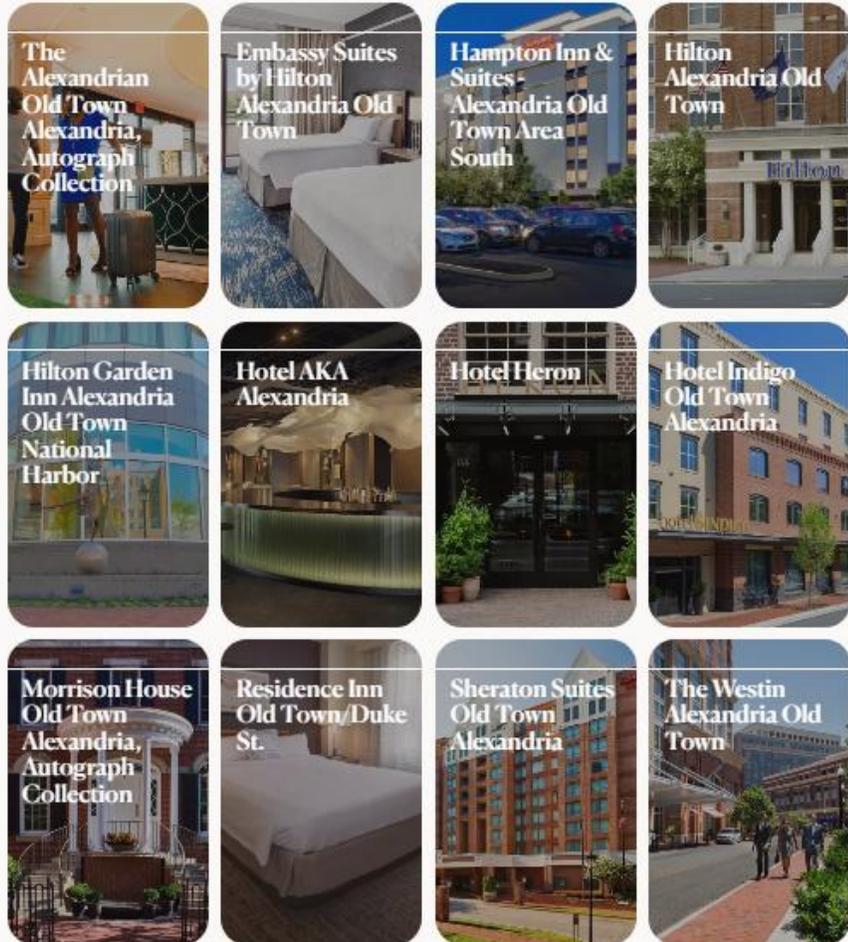
Packaging August offerings as a time-limited, great value

Message: Soak up the last drops of summer with the Love, Alexandria hotel package, Alexandria Sidewalk Sale, Alexandria Restaurant Week and more.



Love, Alexandria Campaign Performance

Participating Hotels



Campaign promoted through digital banners (summer only), paid social, paid search, email newsletter, PR and more.

- **Winter campaign** (DC regional only)
 - 10,000 pageviews
 - 2,400 referrals to hotel partner websites
- **Summer campaign so far** (destination and drive markets)
 - 42,000 pageviews
 - 11,000 referrals to hotel partner websites

Increased traffic to hotel partner websites:
25% clicks on Love, Alexandria go through to hotel partner sites (up from 10%)



Alexandria Commemorates America's 250th

[VisitAlexandria.com/250](https://www.visitalexandria.com/250)

- **Events are happening now**
- **Culminates in summer 2026**
 - Sails on the Potomac, June 12 to 14, 2026
 - City/USA Birthday celebration, July 2026
- George Washington Birthday Parade, Feb. 2026
- Historic Alexandria museum exhibits and lecture series
- George Washington's Mount Vernon experiences
- Office of the Arts *Time and Place* art installation, May to Nov. 2026
- Additional events TBA



250th experiences begin in 2025 and culminate with major events in the summer of 2026. From June 12-14, 2026, Alexandria will host iconic tall ships during *Sails on the Potomac* as a *Sail 250 Virginia*SM 2026 Affiliate Harbor.

Alexandria has played a major role in the nation's story and reflects its progress toward inclusivity. Find [intimate historic museums](#), trace George Washington and the Founding Fathers' footsteps and follow the stories of [Black Americans](#) who shaped the history of Alexandria and the United States. Museums and organizations across Alexandria tell this story through tours, exhibitions, public art, programs, wayfinding signs and more.

Join us as we celebrate and commemorate America's story in Alexandria.

**Opportunity for 250-themed hotel packages,
events, tours, business offerings**



Sails on the Potomac

June 12 to 14, 2026



Alexandria will be hosting Sails on the Potomac from June 12 – 14, 2026 as a Sail 250 VirginiaSM 2026 Affiliate Harbor. This three-day event will highlight Alexandria's unique role in the birth of our new nation and its impact on today. Join us as we commemorate America's Story with music, family activities, exhibits, tours, public art, educational programs and more!



Hotel Opportunities

Content to Load

- Hotel packages
- Events
- Deals and Happenings

Themes

- Fall
- Holiday
- America's 250th
- Accessibility
- Sustainability

Storytelling Interest

- Meeting planner testimonials and success stories
- Renovation of hotel and/or restaurant
- Unique pop-ups, partnerships or offerings



Contact Trisha Meisner, Director of Member Relations, at tmeisner@visitalexva.com for assistance loading content to member portal.





Fall and Holiday Event Highlights

- Sept. 13 & 14 – Alexandria Art Festival in Carlyle
- Sept. 25 to Oct. 5 – Old Town Cocktail Week
- Oct. 4 – Art on the Avenue in Del Ray
- Oct. 10 to Oct. 12 – Fall Wine Festival at Mount Vernon
- Nov. 28 & 29 – Plaid Friday & Small Business Sat.
- Dec. 6 – Scottish Walk Parade and Boat Parade



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Suzanne Thibeault,
CMP

Director of Sales

Hotel and DMO
Collaboration

- 20 Alexandria Hotels Strong
- Major Brands | Independent
- Over 130,000 sq. ft. of meeting space
- Boasting over 3,700 rooms



**Thank You to
Alexandria's
Hotel Partners**





Visit Alexandria Sales Team



Territories with Specialized Markets:

- Target high-yield markets: association, non-profit, and corporate.
- Capitalize on core feeder cities while targeting emerging opportunities.
- Align S.M.E.R.F. market segments with cross-functional audience needs

Top Revenue-generating Markets in FY25:

1. Government
2. Corporate (including Health and Medical)
3. Association – Education
4. Athletic & Sports Recreation
5. Association – Trade, Environmental, and Scientific

Top Booking Organization Headquarters locations in FY25:

The top five drive markets:

1. Virginia
2. Washington, D.C.
3. Maryland
4. New York
5. New Jersey

The top three non-drive markets:

1. California
2. Illinois
3. North Carolina



Sales Team: New Team Deployment





- Corporate and Association markets headquartered in the South and West, with a strategic focus on the Southeast and Midwest
- Government
- Social: Military and Education

INDUSTRY AFFILIATIONS

Association for Meeting Professionals (AMPS), Society of Government Meeting Professionals (SGMP), ConferenceDirect Partner Advocate

GABRIELLA GARCIA Destination Sales Manager

📞 703.652.5372 ✉️ ggarcia@visitalexva.com

INDUSTRY AFFILIATIONS

Meetings Professional International (MPI)
Potomac Chapter, CVB Reps,
HelmsBriscoe Partner Advocate

- Corporate and Association markets headquartered in Virginia, the Northeast, and the Mid-Atlantic
- Social: Fraternal, Religious, and Family Reunion



SHA'NIESHA GRAHAM MBA, CHG | Destination Sales Manager

📞 703.652.5378 ✉️ sgraham@visitalexva.com

- Corporate and Association markets headquartered in Maryland and the Washington D.C. region
- Sports Tourism
- Travel & Trade: Adult and Student Groups - Domestic and International
- Social: Weddings

INDUSTRY AFFILIATIONS

Professional Convention Management Association (PCMA), Northern Virginia Tourism Partnership (NVTP) Tour and Travel Committee Co-Chair, CVB Reps, HelmsBriscoe, ConferenceDirect, SportsVirginia

SUZANNE THIBEAULT, CMP | Director of Sales

📞 703.663.1620 ✉️ sthibeault@visitalexva.com

Meet the Visit Alexandria Sales Team

Meeting Planner Story Telling:

- How does your hotel drive planner inspiration?
- How are you activating your property?

The Basics:

- Lead Catcher & Key Contacts
- Capacities
- Upcoming Renovations
- Preferred Markets
- Need Dates
- Sales Mission



**How We Work
Together**



Hotel Property + Destination = Final Decision

Planner Check-list:

- ✓ **Site Visits: Are the hotel and destination engaged?** Planners see DMO involvement as positive reinforcement and value-add during the BID process.
- ✓ **Can I find the solutions I need with the hotel and DMO together?** Planners are seeking information about destination opportunities and solutions for their group or client as part of their hotel canvassing. Bookings report increased conversion rates when DMO is engaged from the beginning.
- ✓ **Real and fast feedback: planners seek out DMOs for hotel recommendations for quicker turnaround.** Planners turn to DMO/CVB partners for trusted recommendations and hotel sourcing, expecting speedier turnaround times by going direct. Our goal is to reinforce this sentiment to get leads to you quickly and get responses to planners just as fast.

**Planners
Consider the
Full Package**



Welcome to Alexandria, VA!



APRIL 12-14, 2026

Cooperative Education and Internship Association
2026 Annual Meeting

Alexandria, VA, warmly welcomes attendees of the
Cooperative Education and Internship
Association 2026 Annual Meeting, April 12-14,
2026.

Visit a Travel - Explore a Top 5 City in the U.S. in
2024 and a Central Place Provider - See 3 Star Hotel
On the U.S. in 2025. Alexandria is a welcoming
city on the Potomac River, minutes from
Washington, D.C. Founded in 1749 and boasting
the nation's most vibrant historic district, Alexandria
hosts with a cosmopolitan feel. Small [City](#) [State](#)
Adopting a City Street walk to find more than 200
independent boutiques and boutiques. [Home](#)
[Local](#) [Music](#) and new happenings in the [City](#).

Keep watching for tips to get around Alexandria and inspiration to fill your free time. We can't
wait to see you in April!



Our team tracks your proven
impact through:

1. Room Nights
2. Room Rate
3. Food and Beverage
4. Room Rental

When the hotel and DMO
partner, we can offer
planners:

1. Free Visitor Guides
2. Team Building Experiences
3. Restaurant Booking Help
4. Dine-Around Assistance
5. Dedicated Webpage
6. Community Connections



Beyond the Booking



Meetings and Conference Audience:

- September: SMARTMeetings
- December: Connect Marketplace
- April: HelmsBriscoe Annual BusinessConference

Travel & Trade Audience:

- January: American Bus Association

HB | HELMSBRISCOE

Smart meetings
experience the extraordinary



Connect
Marketplace

Activity:

- Monthly industry event involvement
- Quarterly Sales Missions
- Collaboration Opportunities with Hotel Partners:
 - Industry event sponsorships
 - Industry Events client luncheons
 - Attendance at hosted member events



**Sales Team:
Tradeshows &
Activity
2025 - 2026**



Washington, DC | 2026 || 5,000 peak room nights+ and 20,000 attendees+
Walter E. Washington Convention Center

- **Capitol Hill VolleyBall Classic:** Peak 7k+ | Attendees: 23k+
- **American Society of Cataract & Refractive Surger:** Peak 6k+ | Attendees: 26k+
- **National Association of Realtors:** Peak 5k+ | Attendees: 25k+
- **American Water Works Association:** Peak 5k+ | Attendees: 21k+
- **American College of Surgeons:** Peak 5k+ | Attendees: 22k+
- **Association of the United States Army:** Peak 6k+ | Attendees: 22k+
- **Society for Neuroscience:** Peak 10k+ | Attendees: 58k+

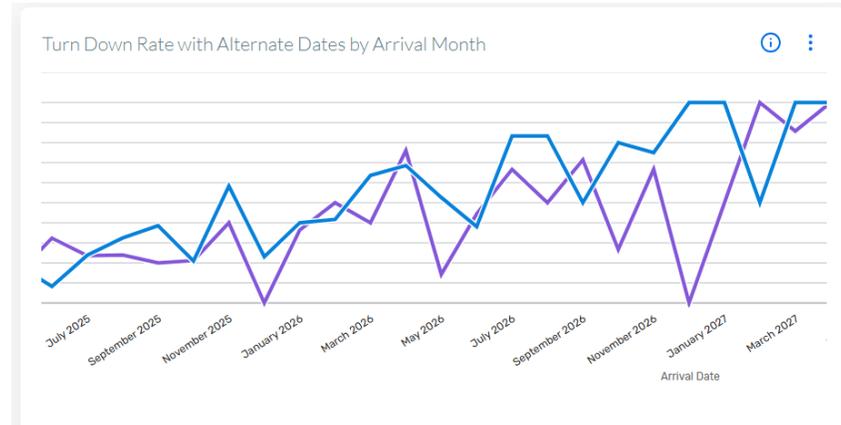


**Citywides
Washington,
DC**



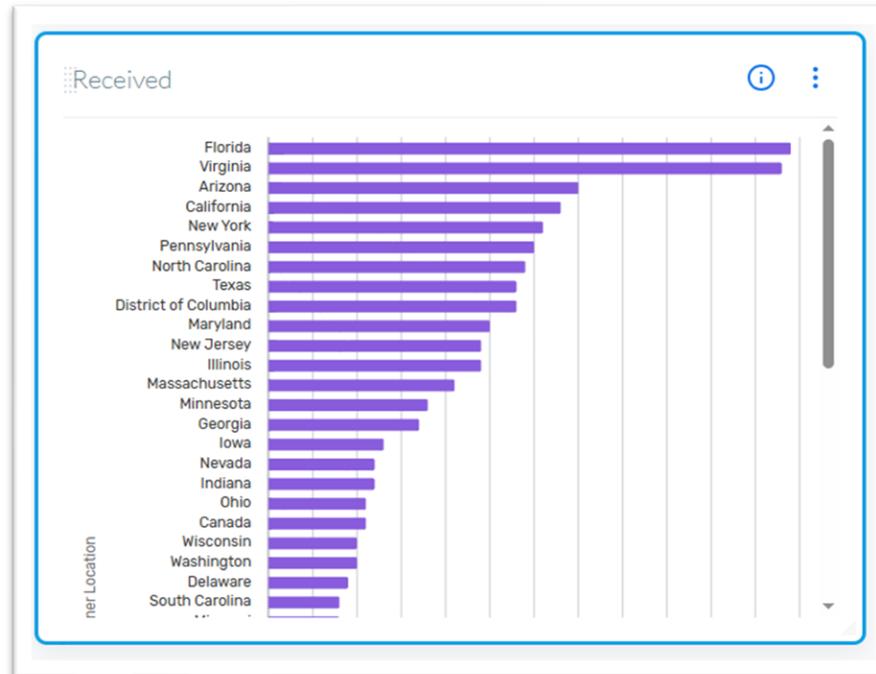
Alexandria hotels are turning down fewer RFP's where the planner was flexible with dates.

Notes for your teams: Keep up the best practice of providing alternative dates and concessions to win the business.



Looking across all Alexandria properties, the top locations where our planners are from:

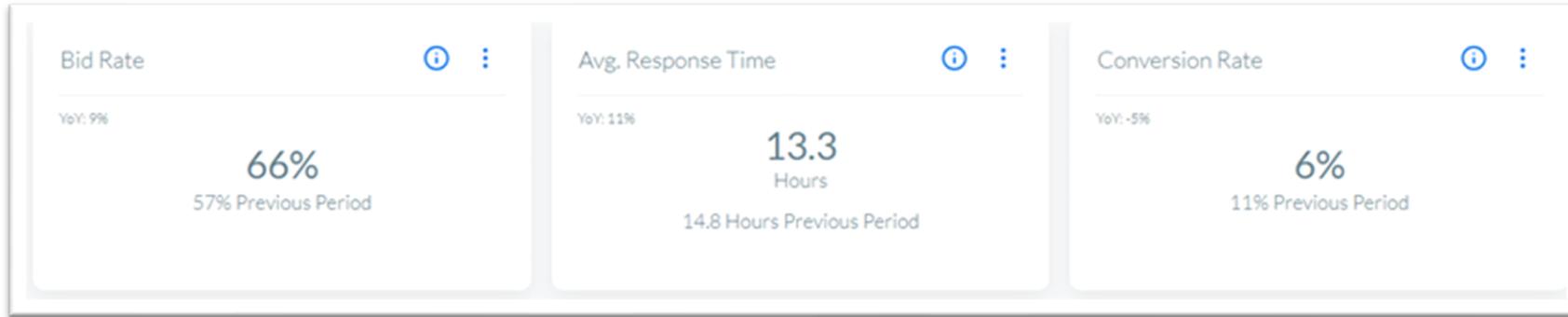
1. Florida
2. Virginia
3. Arizona
4. California
5. New York



CVENT Corner: ALX Hotels Calendar Year



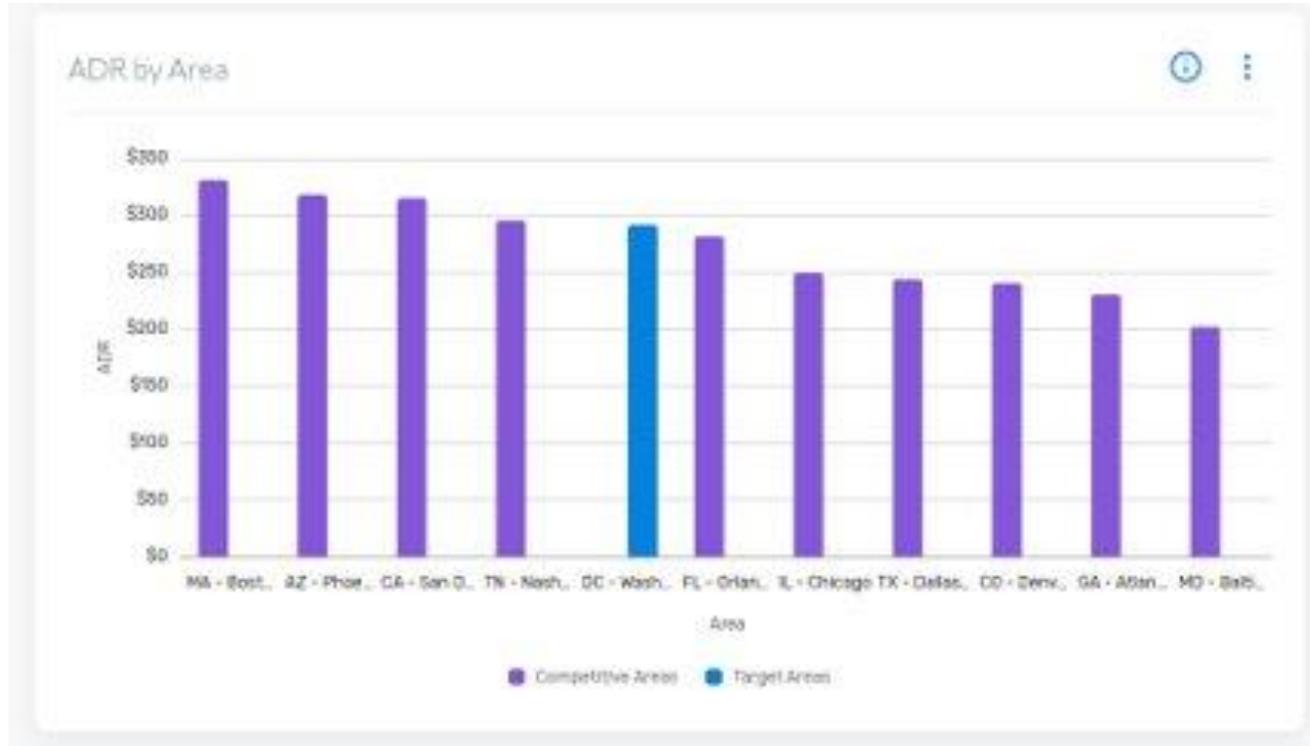
cvent



CVENT Corner: ALX Hotels Calendar Year

- **Bid Rate:** Increase from last year, properties are bidding on 66% of incoming RFP's.
- **Average Response Time:** Great average response time. The goal here is to stay under 16 business hours.
 - CVENT RESPONDER TAG
- **Conversion Rate:** Slight decrease from last year. This shows the number of RFP's that were converted to awarded RFP's after a bid has been submitted.

Alexandria hotels are categorized into the Washington, DC, MMA competitive set.
Overall, we're in a good spot and not outpricing ourselves.



CVENT Corner: Washington, DC Comp Set Calendar Year

1. **Informed Insights Drive Inspiration:** The more we know, the better we can showcase your property's aligned appeal.
2. **Introducing Our New Sales Team:** Meet the newest members of our team – they're here to help and deliver results.
3. **Collaborative Partnerships Drive Positive Perceptions:** When hotels and DMOs work together, it strengthens planners' final decisions.
4. **CVENT's Top Responder Tag:** Leverage this feature to stand out and increase visibility with planners.
5. **Committed to Your Success:** We're always here to support you.



Sales Team: Top 5 Takeaways



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Vito Fiore

Vice President of
Marketing & Research

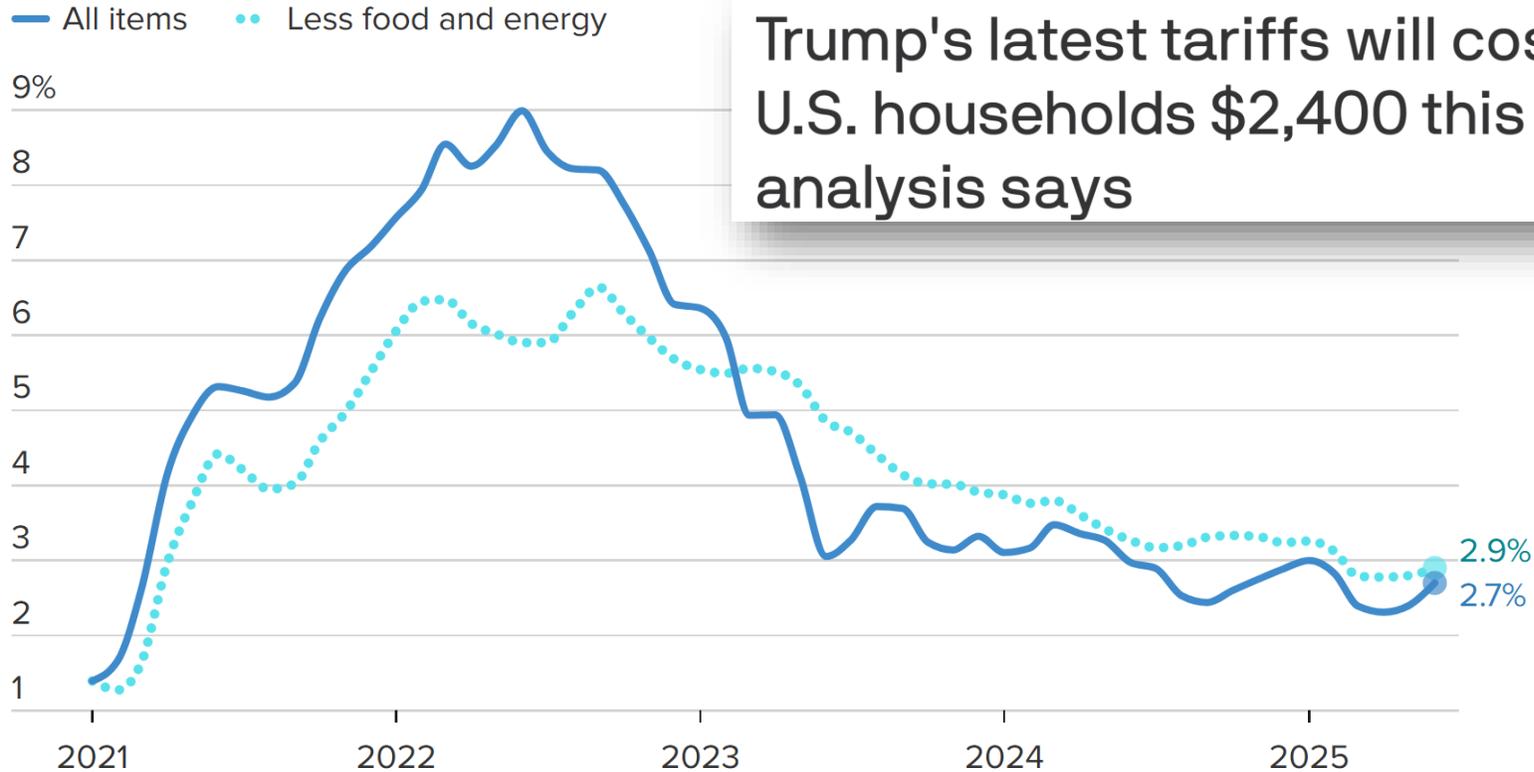
Research Update
for Alexandria
Hotel Association

Economic Trends



U.S. consumer price index

Year-over-year percent change | Jan. 2021–June 2025



Trump's latest tariffs will cost U.S. households \$2,400 this year, analysis says

**Inflation
Remains Low,
but Tariffs are
a Risk**

Note: Not seasonally adjusted

Source: [U.S. Bureau of Labor Statistics](#)

Data as of July 15, 2025



Source: Axios, Yale Budget Lab

July jobs report falls short of expectations

U.S. employers only created 73,000 in July, well short of the 100,000 that were expected. Data for May and June was also downgraded.

Monthly job creation in the U.S. | Jan. 2022–July 2025

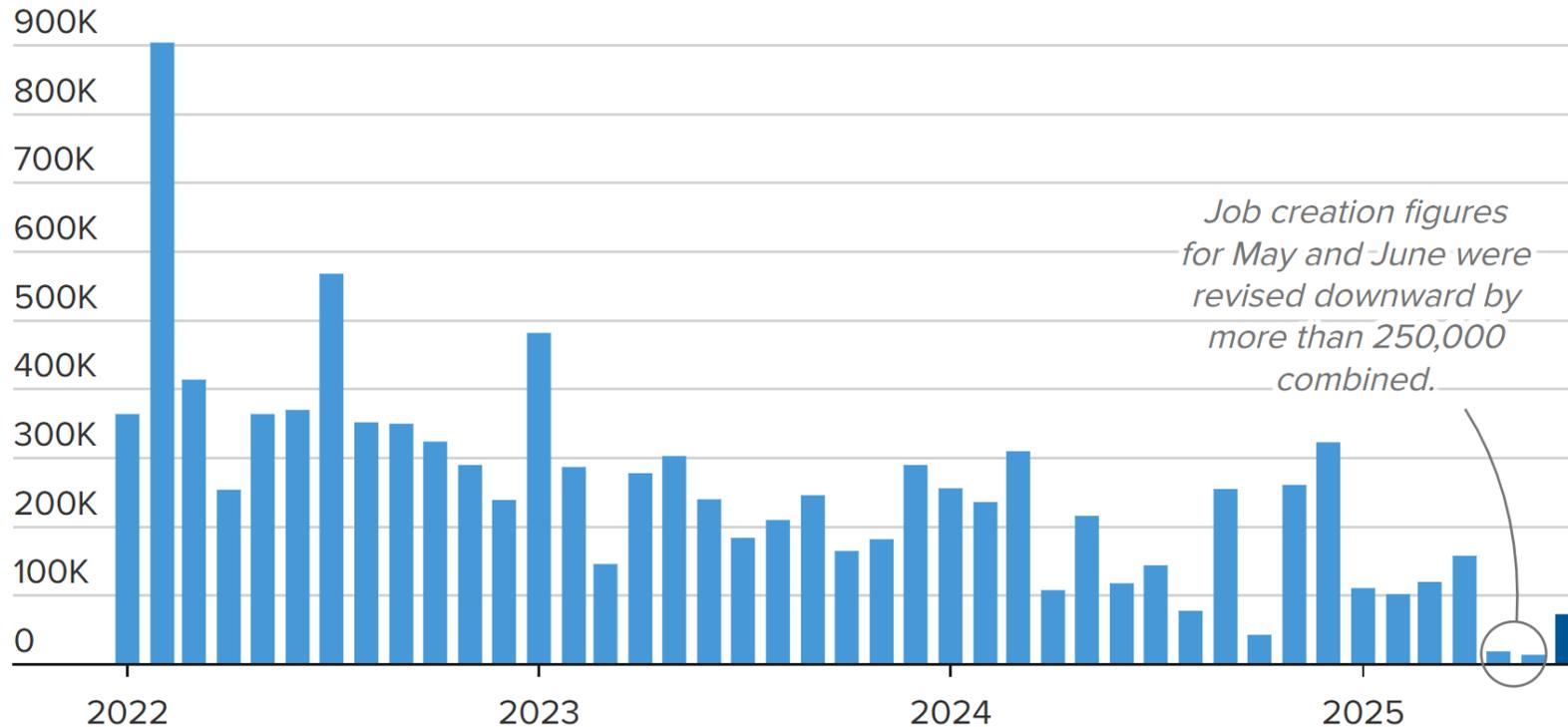


Chart: Gabriel Cortes / CNBC

Source: [U.S. Bureau of Labor Statistics](#) via [FRED](#)

Data as of Aug. 1, 2025

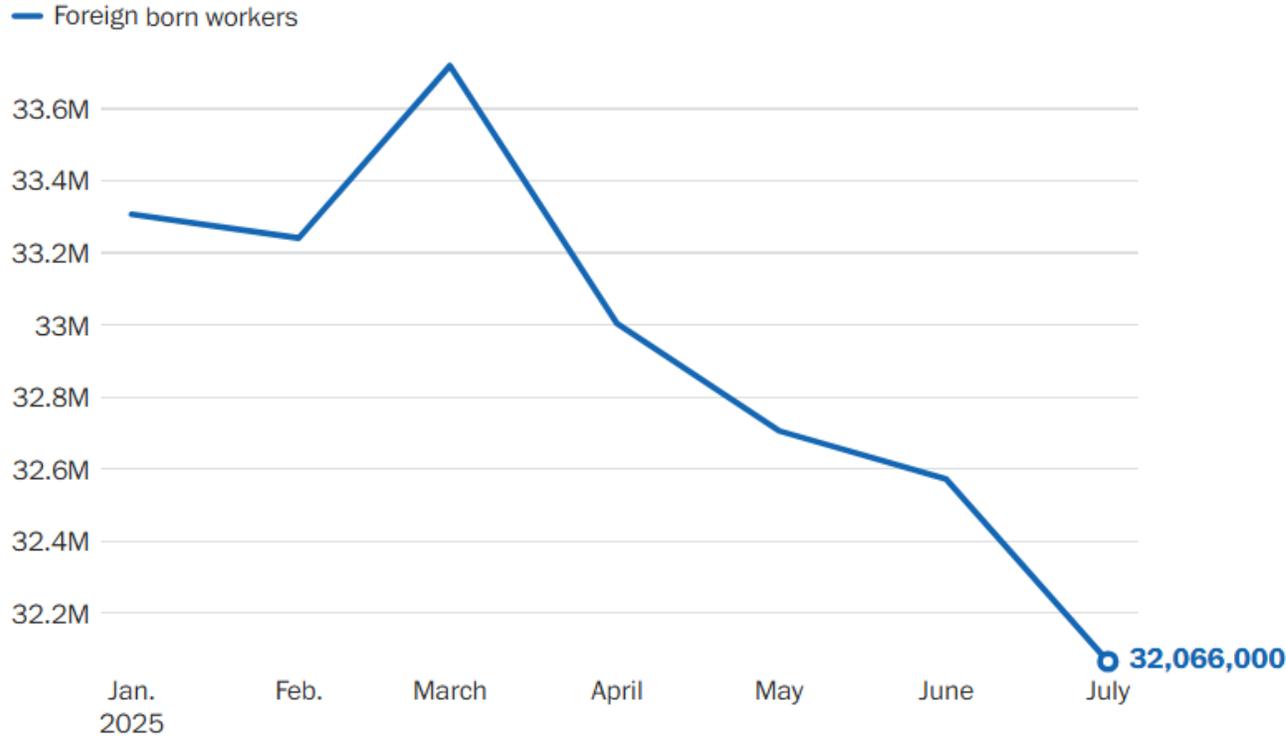


**Unemployment
Low but
Hiring Slows**



More than 1.6 million immigrants have left the U.S. workforce since March

The number of immigrants in the civilian workforce



Source: Labor Department

LAUREN KAORI GURLEY / THE WASHINGTON POST

Immigration Enforcement Tightens Labor Supply

- **The U.S. may see more than 500,000 people emigrate from the country** as a result of President Donald Trump's aggressive deportation campaign, according to a recent report from the American Enterprise Institute. With foreign-born workers making up a

Source: Fortune



Wavering US Consumer and Job Market Show Risks to Economy

Stagflation fears are back

Goldman Sachs is getting worried about the economy

American Consumers Are Getting Thrifty Again

Generic brands and bulk buying are on the rise and fewer fancy burritos are being sold; “The ‘what the heck’ purchase is completely gone”

Higher U.S. tariffs will extend uncertainty for businesses, experts say. Here's why.

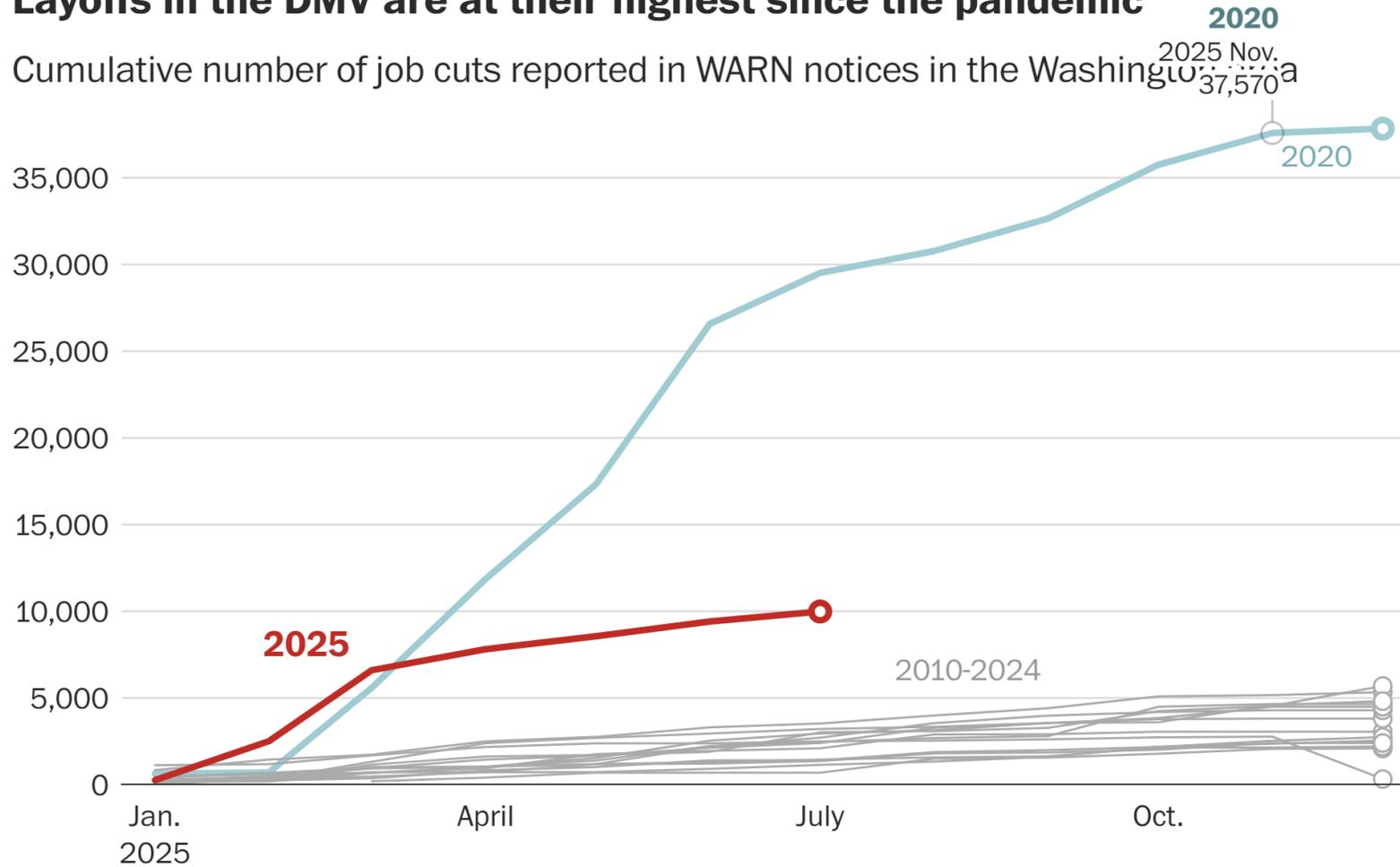
Economic Headlines



Sources: Bloomberg, Axios, CNBC, Wall Street Journal, CBS News

Layoffs in the DMV are at their highest since the pandemic

Cumulative number of job cuts reported in WARN notices in the Washington DC area



Source: Washington Post analysis of WARN notices. DC data for 2014 has not been published.

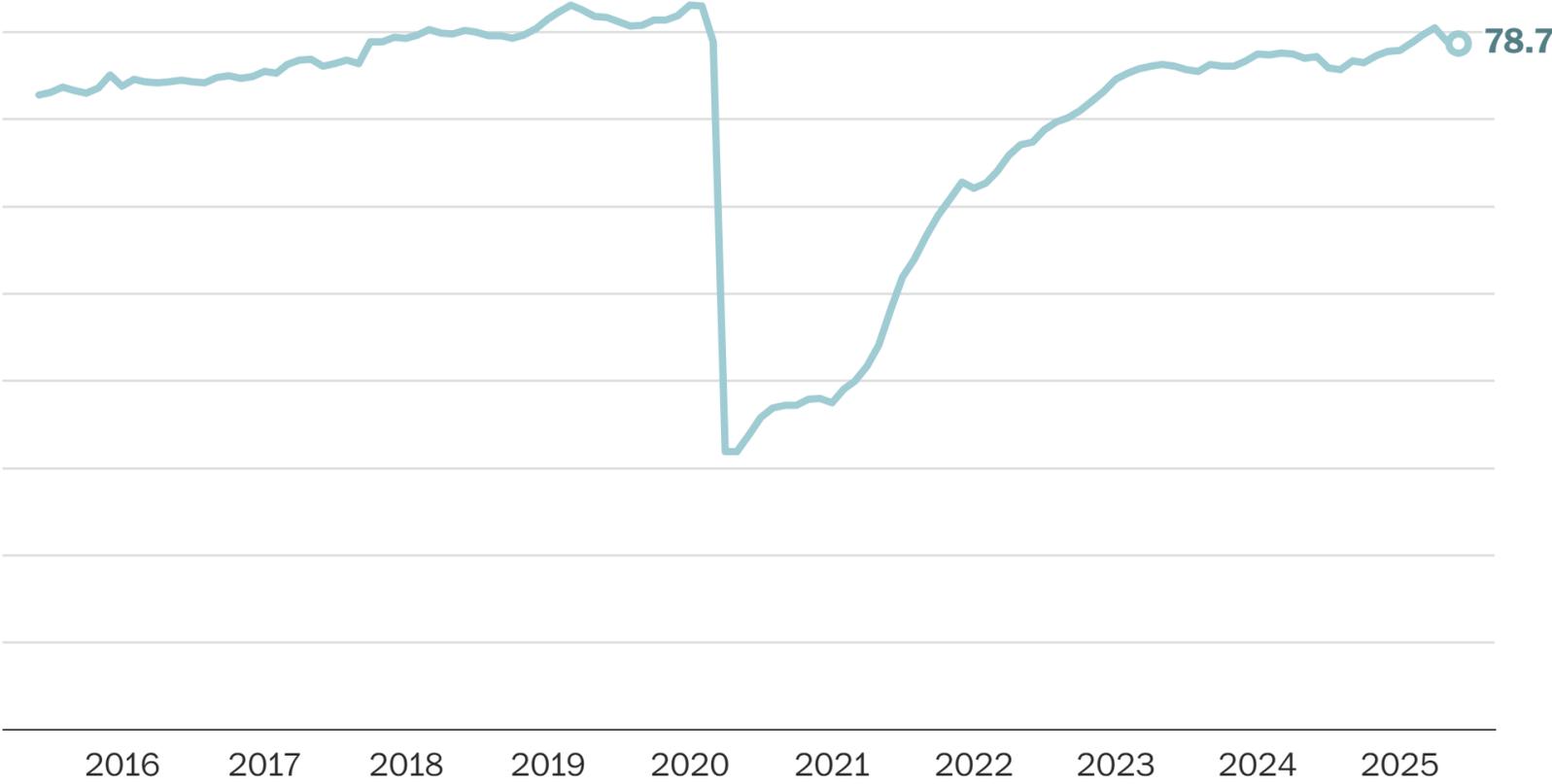
FEDERICA COCCO / THE WASHINGTON POST

DC Region Headwinds



D.C.'s hospitality jobs were bouncing back. Now the recovery is losing steam.

Employment in the leisure and hospitality sector in D.C. (Thousands)



Source: [U.S. Bureau of Labor Statistics](#)

DC Region Headwinds



National Travel Trends



Travel Indicators

% change relative to same month vs. Previous Year

Indicators	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Travel Spending (Tourism Economics)	1.6%	3.4%	0.4%	3.4%	2.6%	2.4%	3.4%	2.0%	0.8%	0.3%	0.6%	-0.4%
Air Passengers (TSA)	5.4%	5.5%	2.0%	0.8%	0.2%	6.6%	1.7%	-3.0%	-0.2%	0.2%	-1.7%	-1.0%
Overseas Arrivals (NTTO)	9.2%	7.6%	4.5%	5.8%	6.3%	5.8%	5.4%	-2.4%	-11.6%	8.0%	-2.8%	-3.4%
Hotel Demand (STR)	0.0%	1.9%	-1.9%	2.8%	2.4%	1.9%	1.6%	1.2%	0.4%	-1.2%	0.1%	-0.8%
Top 25 Group Hotel Demand** (STR)	6.1%	6.6%	6.8%	-0.7%	-4.8%	7.6%	-0.1%	4.0%	2.8%	-0.1%	-4.4%	-6.2%
Short-term Rental Demand (AIRDNA)	7.8%	11.0%	1.5%	7.1%	7.6%	6.0%	10.8%	4.2%	2.6%	9.1%	3.6%	2.3%
National Park Visits (National Park Service)	-0.7%	1.2%	-1.0%	-4.0%	1.2%	1.3%	1.2%	-9.3%	-2.9%	-3.5%	-11.9%	-14.4%

Travel Indicators

% change relative to same month vs. 2019

Indicators	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Travel Spending (Tourism Economics)	9.8%	10.0%	15.8%	13.2%	11.1%	13.2%	11.8%	11.4%	7.6%	13.1%	14.0%	11.1%
Air Passengers (TSA)	6.7%	4.5%	7.5%	6.0%	6.2%	5.9%	6.5%	6.9%	6.2%	6.4%	6.2%	6.3%
Overseas Arrivals (NTTO)	-14.4%	-11.5%	-12.1%	-10.2%	-12.0%	-6.8%	-12.8%	-15.5%	-17.1%	-14.4%	-15.9%	-19.6%
Hotel Demand (STR)	-3.4%	-3.0%	-0.7%	0.6%	-0.4%	1.1%	0.8%	-0.1%	-2.5%	-1.5%	-0.7%	-2.7%
Top 25 Group Hotel Demand** (STR)	-6.5%	-0.8%	2.4%	-1.0%	-7.6%	-5.2%	-6.5%	0.3%	-4.4%	-3.6%	-7.6%	-11.4%
Short-term Rental Demand (AIRDNA)	35.3%	25.6%	22.7%	41.0%	37.5%	32.9%	40.0%	56.5%	41.0%	38.4%	43.6%	44.3%
National Park Visits (National Park Service)	-3.8%	-4.0%	2.3%	7.4%	6.3%	9.6%	29.7%	10.1%	19.9%	2.4%	-5.1%	-11.8%

Source: US Travel, Tourism Economics



TRAVEL PRICE INDEX | JUNE 2025

TPI Component	Index (seasonally adjusted)				Year-over-year % change	% change compared to 2019	Seasonally adjusted change from preceding month
	Jun 2019	Jun 2024	May 2025	Jun 2025	Jun 2025/2024	Jun 2025/2019	Jun 2025
TPI	292.4	348.9	350.0	347.5	-0.4%	18.9%	-0.7%
Transportation	244.1	274.6	255.8	257.2	-6.3%	5.4%	0.6%
Airline Fares	262.5	247.5	239.2	238.9	-3.5%	-9.0%	-0.1%
Motor Fuel	233.0	297.4	270.2	273.0	-8.2%	17.2%	1.0%
Intracity Public Transportation	322.2	342.6	341.7	340.5	-0.6%	5.7%	-0.4%
Intercity Transportation	159.6	160.9	159.6	158.1	-1.8%	-0.9%	-1.0%
Lodging (Specifically Hotels/Motels)	343.1	380.2	379.8	366.3	-3.7%	6.8%	-3.6%
Recreation	315.8	370.5	384.3	385.4	4.0%	22.0%	0.3%
Food and Beverage	287.5	371.3	383.9	385.4	3.8%	34.1%	0.4%
Alcohol Away From Home	354.6	428.2	440.0	441.9	3.2%	24.6%	0.4%
Food Away From Home	284.3	368.6	381.2	382.8	3.8%	34.6%	0.4%
CPI-U	255.2	313.1	320.6	321.5	2.7%	26.0%	0.3%

SOURCE: U.S. Bureau Of Labor Statistics, U.S. Travel Association

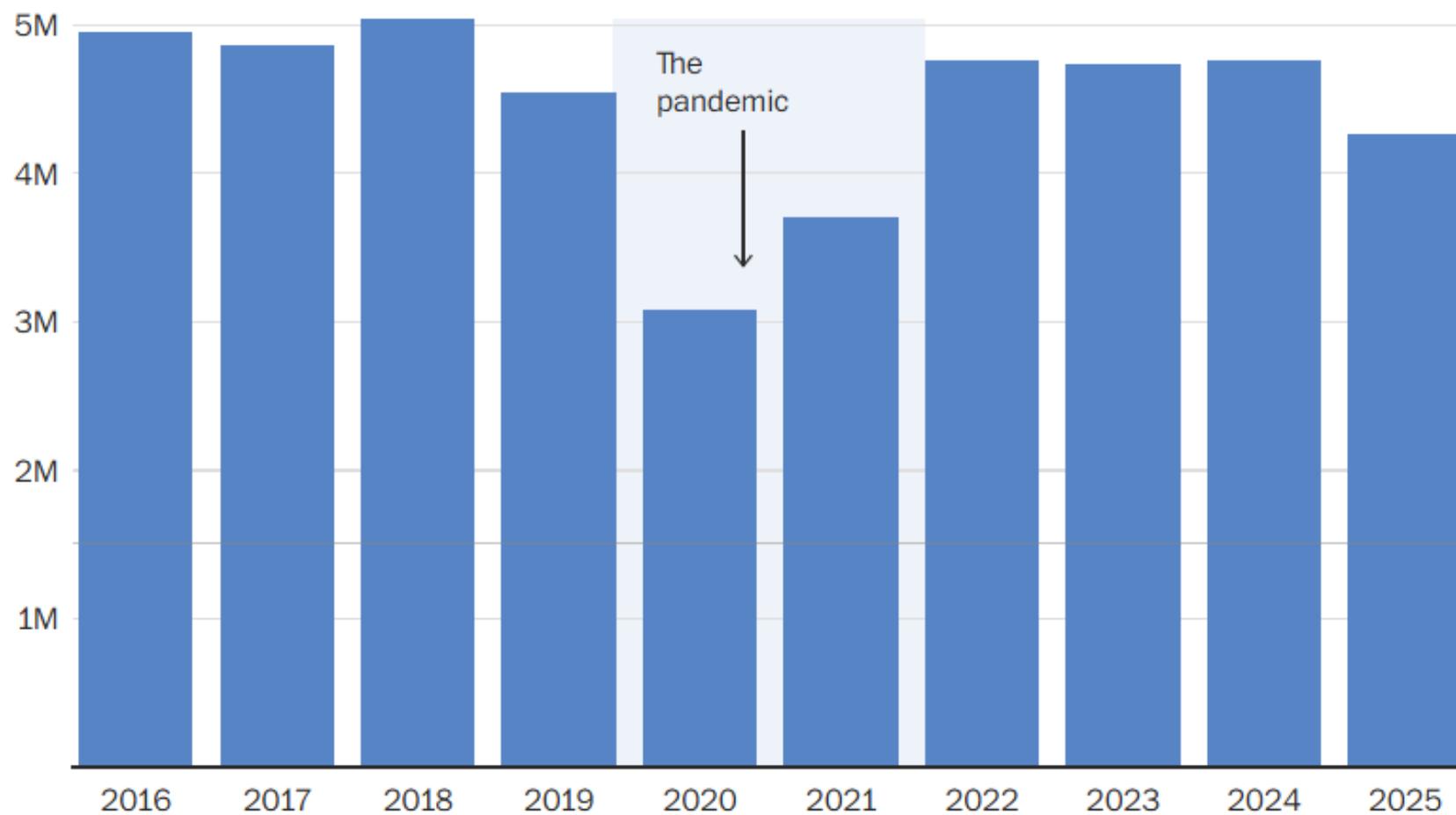
Airfare, Hotel Rates, Gas Prices Down

Dining Prices Up



Fewer Americans took vacation from work this June than any year since the pandemic

The number of working Americans on vacation in June



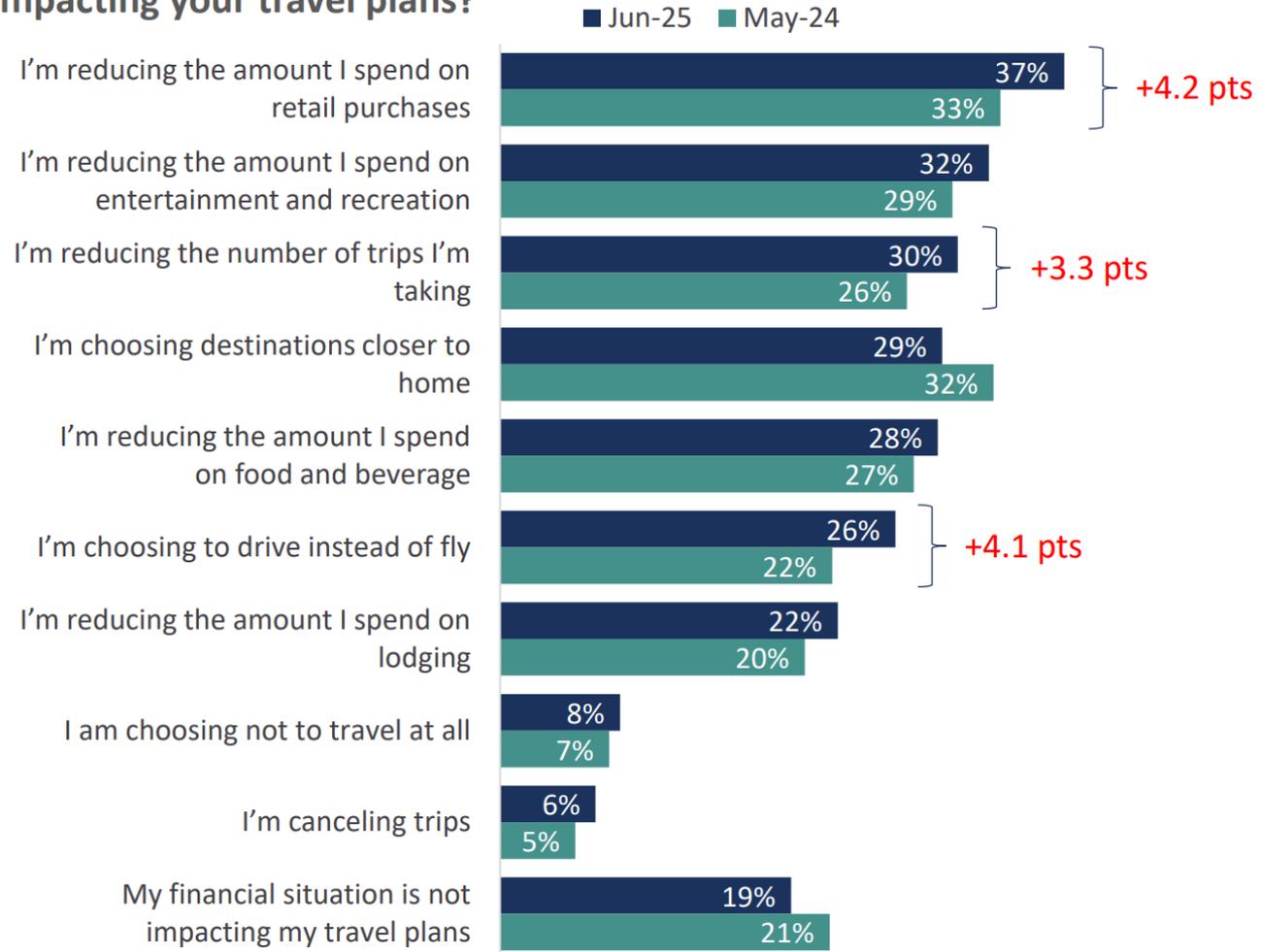
Source: Labor Department

LAUREN KAORI GURLEY / THE WASHINGTON POST



Travelers More Cautious with Spending on Trips

During the next six months, how is your personal financial situation impacting your travel plans?

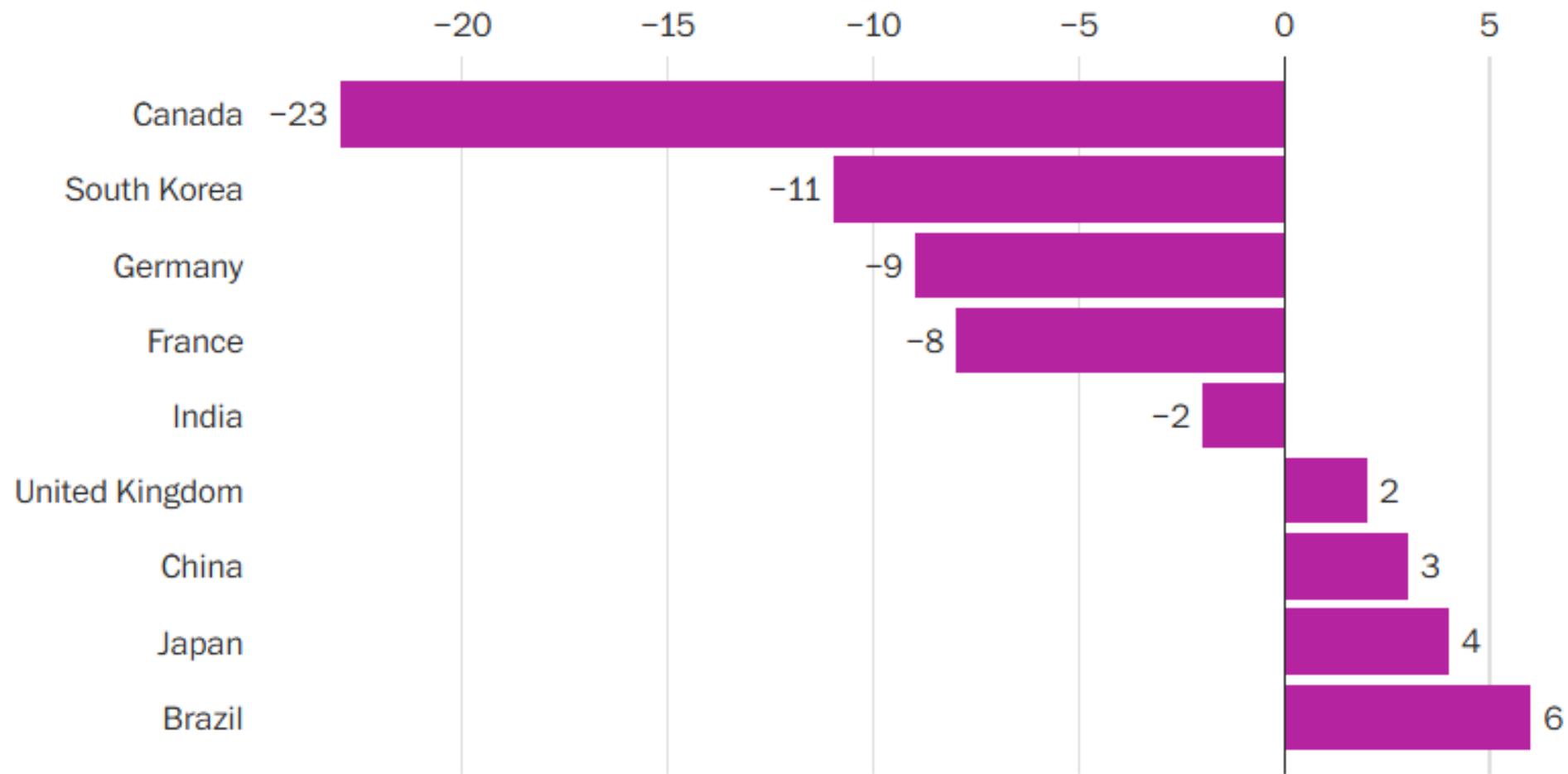


While there was a decrease in concerns greatly impacting travel decisions, American travelers are still being more cautious with their travel spending compared to May 2024. **37%** of travelers say they are **reducing the amount they spend on retail purchases**, a **4-point increase** from May 2024. There is **4-point increase** in American travelers **choosing to drive instead of fly**. There is also a **3-point increase** in travelers **reducing the number of trips** they are taking.

Source: Longwoods International ATS Wave 97
 Percentages are based only on respondents who are confirmed travelers intend on traveling in the next six months

International travel to the United States has been mixed this year.

Year-over-year change in arrivals to the United States by country through June



Source: Tourism Economics

LAUREN GURLEY GURLEY / THE WASHINGTON POST



Marriott CEO: ‘Cautiously Optimistic’ – But Last-Minute Bookings Raise Concern

Marriott CEO Anthony Capuano told Skift recently that booking windows are now typically “sub-three weeks,” meaning under 21 days. This reflects the ongoing

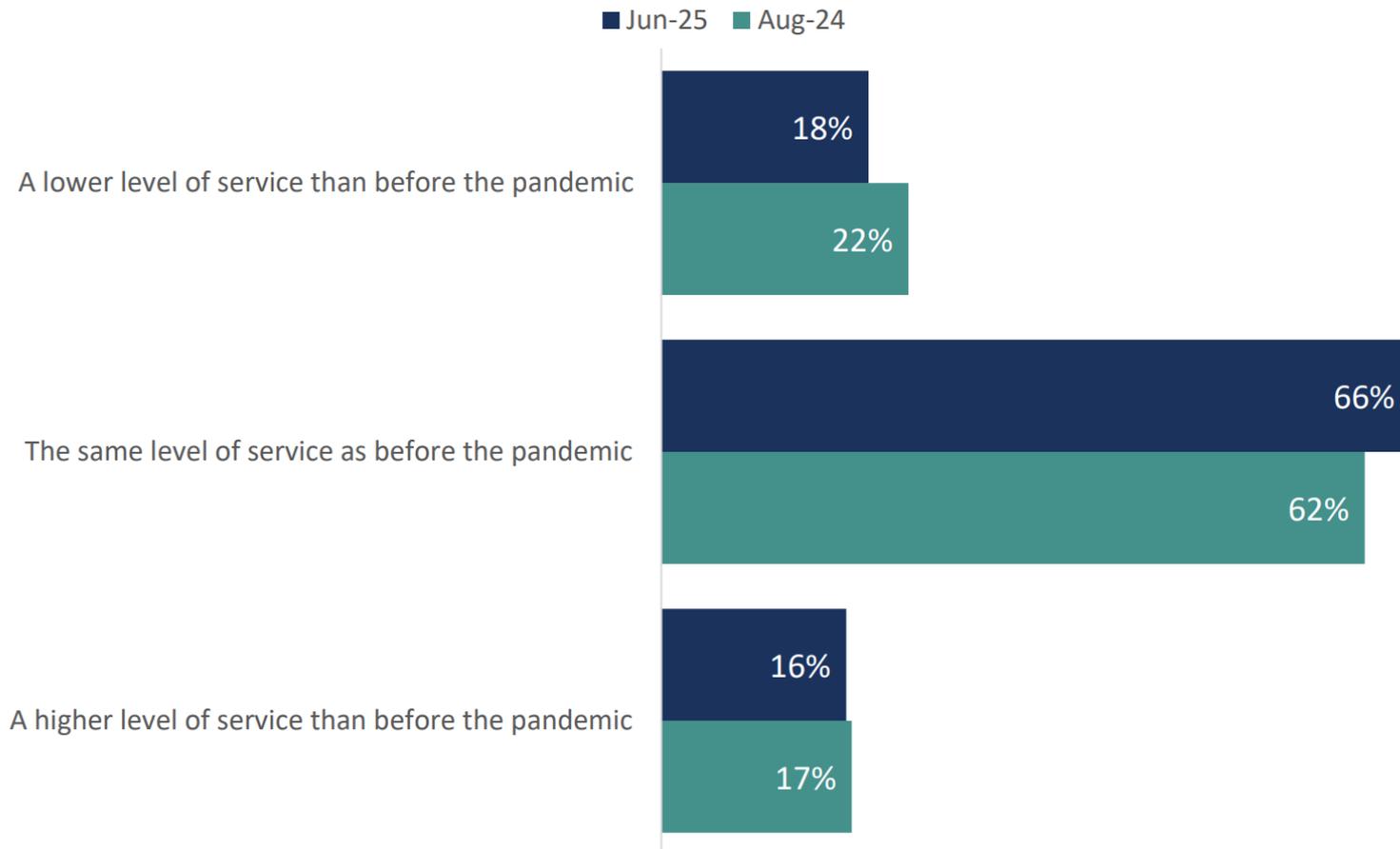
Forty percent of hotel reservations are now made within 30 days of arrival, underscoring a significant shift in traveler behavior towards shorter booking lead times. Spontaneity, mobile-first decisions, and digital expectations are fueling this trend. This shift requires hoteliers to adapt by implementing real-time inventory management and dynamic pricing strategies (among other things) to effectively capture last-minute demand and maximize revenue.

**Booking
Windows
Shorten**



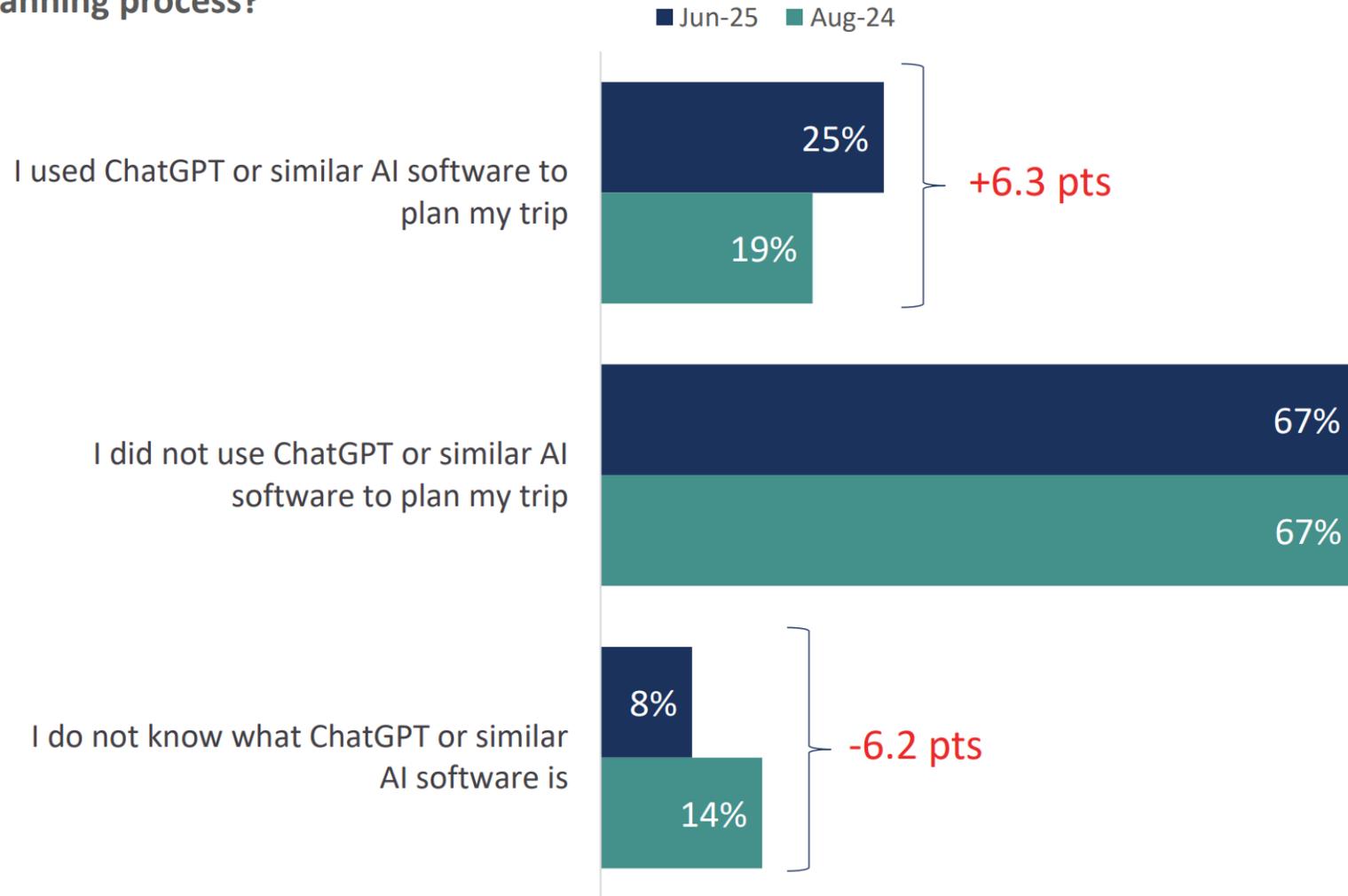
Service Levels on the Rise

On your most recent trip in the last three months, what level of service did you receive from tourism and hospitality businesses?



Compared to August 2024, there is a **4-point increase** in those who said they **received the same level of service** as before the pandemic. Additionally, travelers indicating that they received a higher level of service than before the pandemic has held steady at 16%, showing the level of service at tourism and hospitality business is improving, but not surpassing pre-pandemic levels.

In the last six months, have you used ChatGPT or similar AI software in the trip planning process?



Source: Longwoods International ATS Wave 97

Percentages are based only on respondents who are confirmed travelers and have taken a trip in the last six months

AI Trip Planning Finally Taking Off



A Look Ahead



**Marriott trims 2025 revenue forecast,
flags hit from government spending cuts**

**Hilton lifts 2025 profit forecast on US
demand recovery expectations**

**American Airlines scales back 2025
profit outlook as third-quarter forecast
falls short**

*Delta's Stock Soars 12% on Signs of
'Stabilized' Travel Demand*

The airline reported better earnings than expected for its latest quarter, and restored its forecast for the rest of the year.

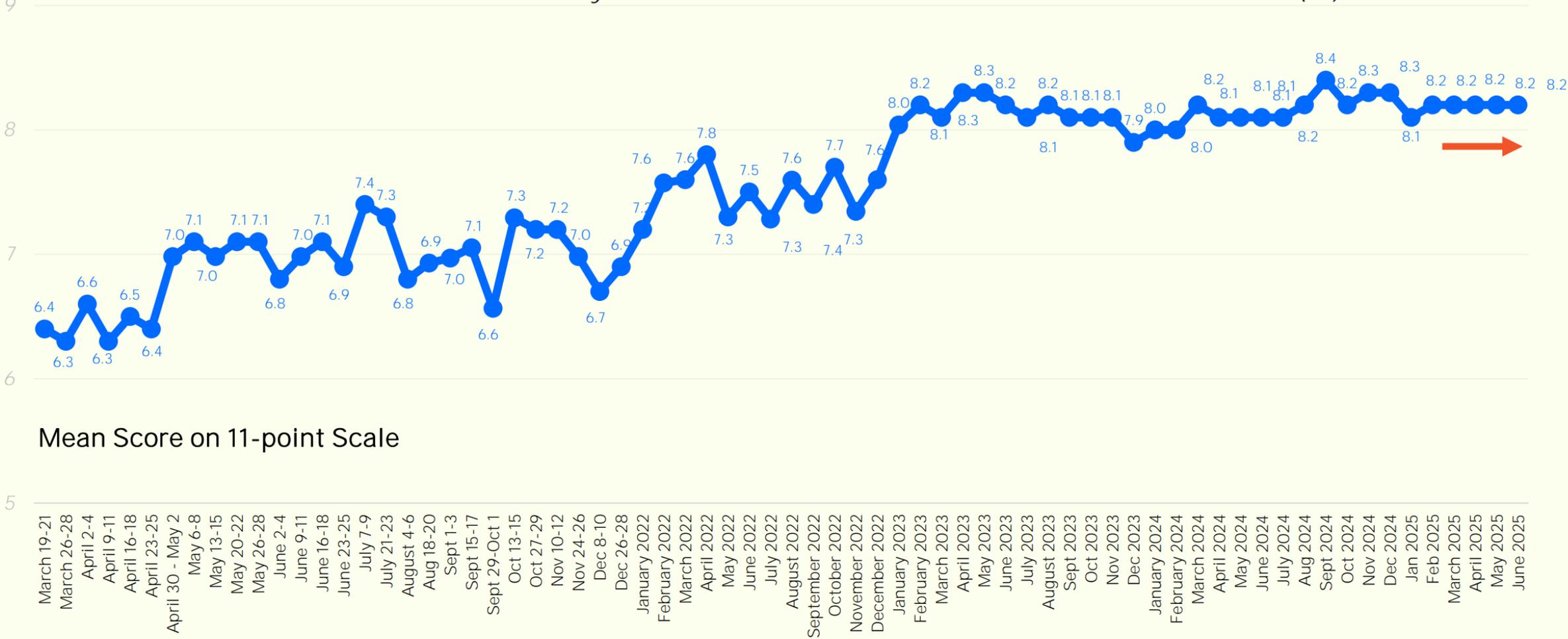
**Travel Outlook
Uncertain**

Sources: Reuters, CNBC,
New York Times



Excitement to travel remains elevated.

Question: Which best describes how excited you are about LEISURE TRAVEL in the NEXT TWELVE (12) MONTHS?



Mean Score on 11-point Scale

Global Business Travel Spend (Billions US \$)



Source: Global Business Travel Association / Rockport Analytics

While in nominal terms the 2024 figure was an all-time high, when adjusted for inflation it remains 14 percent below 2019, according to GBTA.

Global Business Travel Recovery Continues, but Growth Slows



U.S. Hotel Forecast

YoY – year over year (% change)

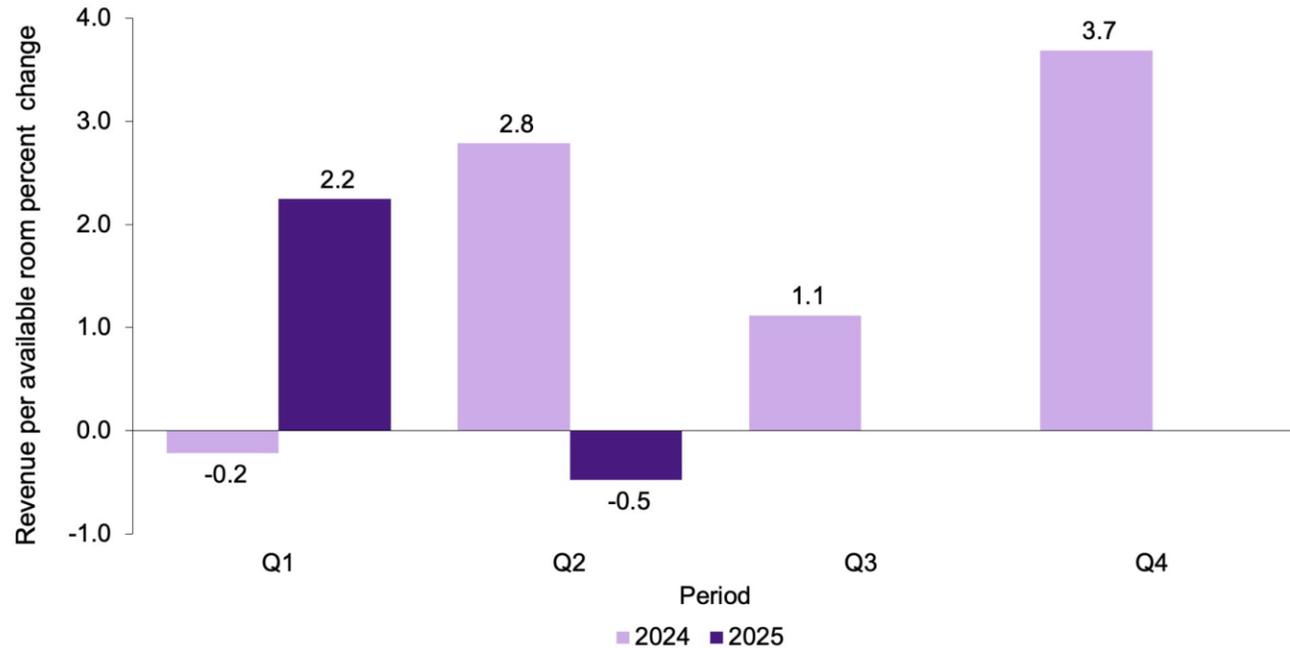
	2024 Actual	2025 Forecast	2026 Forecast
Supply (YoY)	+0.5%	+0.8%	+0.8%
Demand (YoY)	+0.5%	+0.5%	+1.1%
Occupancy	63.0%	62.8%	63.0%
ADR (YoY)	+1.8%	+1.3%	+1.3%
RevPAR (YoY)	+1.9%	+1.0%	+1.5%

**CoStar Forecast
Called for
Modest Growth
in 2025/2026**



Tough fourth quarter comparable ahead

US revenue per available room percent change by quarter, 2024 and 2025



Source: CoStar Group, July 2025



**Since Forecast,
Midweek
Softness in Q2**

**Outlook
Weakens**

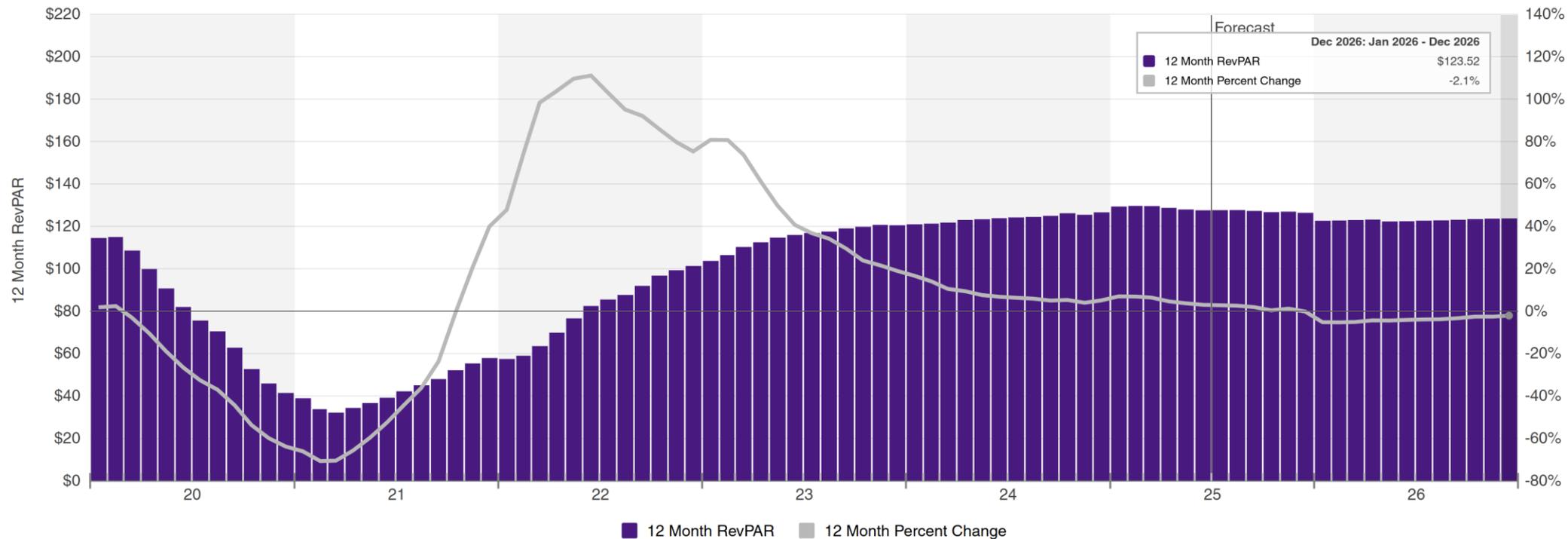
Corporate room demand softened during the second quarter. Wednesday night occupancy, a traditional barometer of corporate travel activity, was consistently lower each month compared to 2024. This trend reflects a broader decline in midweek demand, which is typically supported by corporate and association group meetings. But

The current forecast for full-year RevPAR growth in 2025 stands at 1%, but the negative results from the second quarter and the anticipated softness in the fourth quarter suggest that a downward revision is likely.



DC Region CoStar Forecast

REVPAR

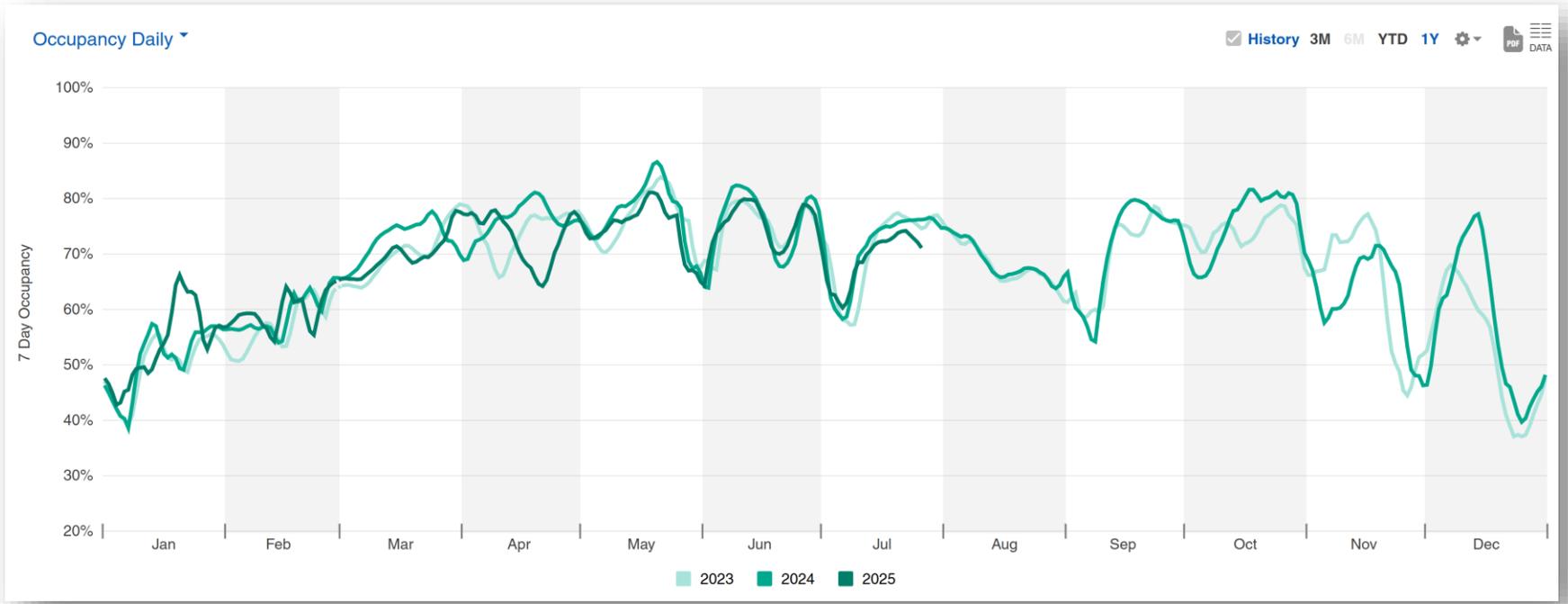


**Small RevPAR
Declines in Both
2025 and 2026**



DC Region and Alexandria Hotel Trends



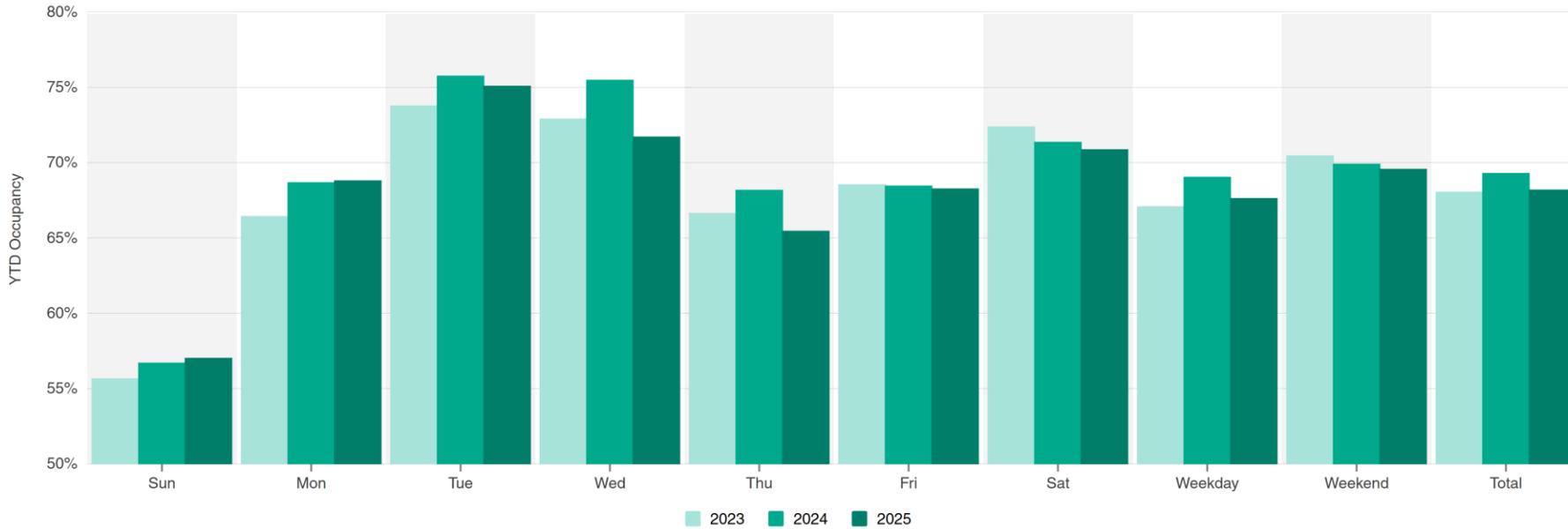


**DC Region:
Occupancy
Tracking
Behind Since
March**



Source: CoStar

OCCUPANCY BY DAY OF WEEK

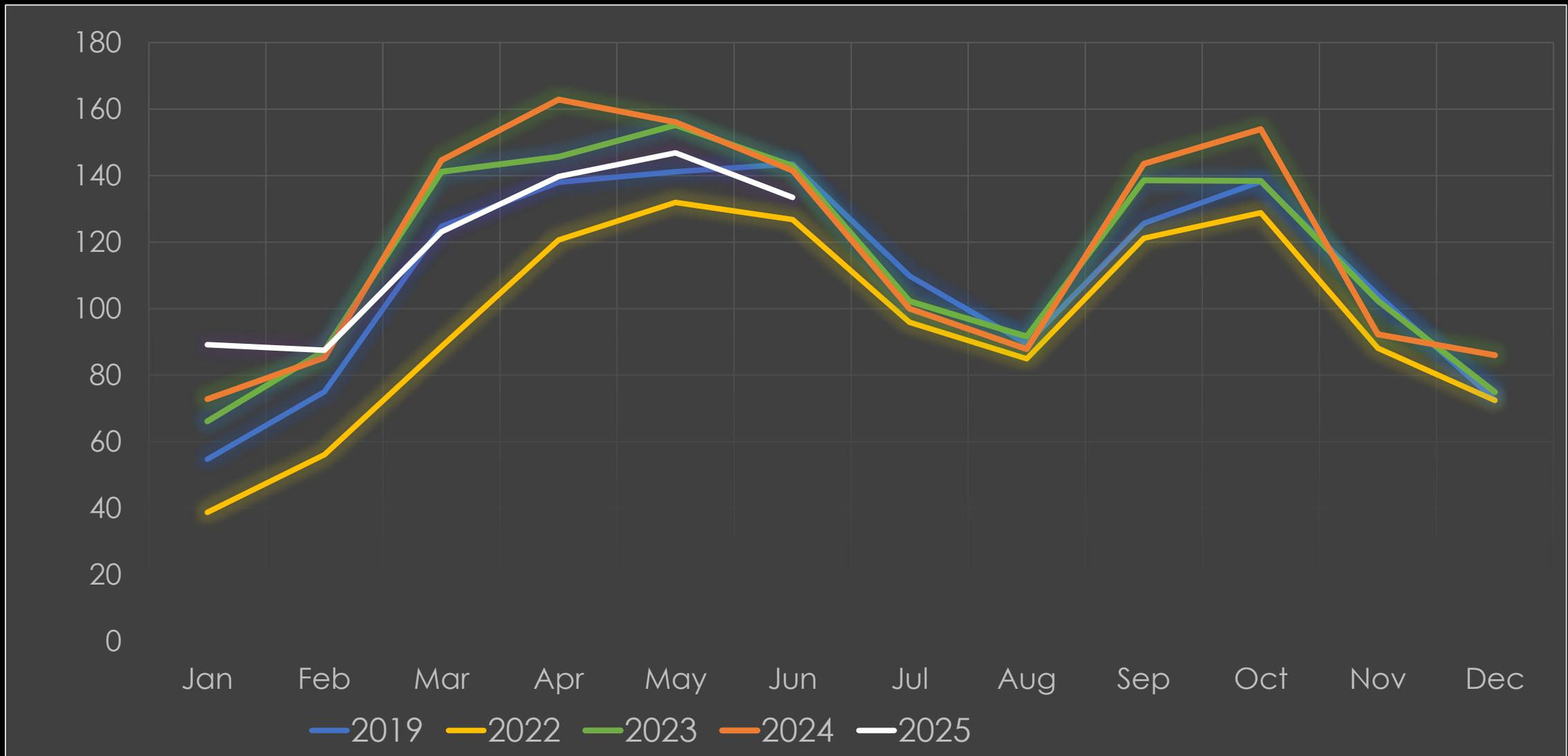


**DC Region:
Largest 2025
Demand Drops
are Tues-Thurs**



Source: CoStar

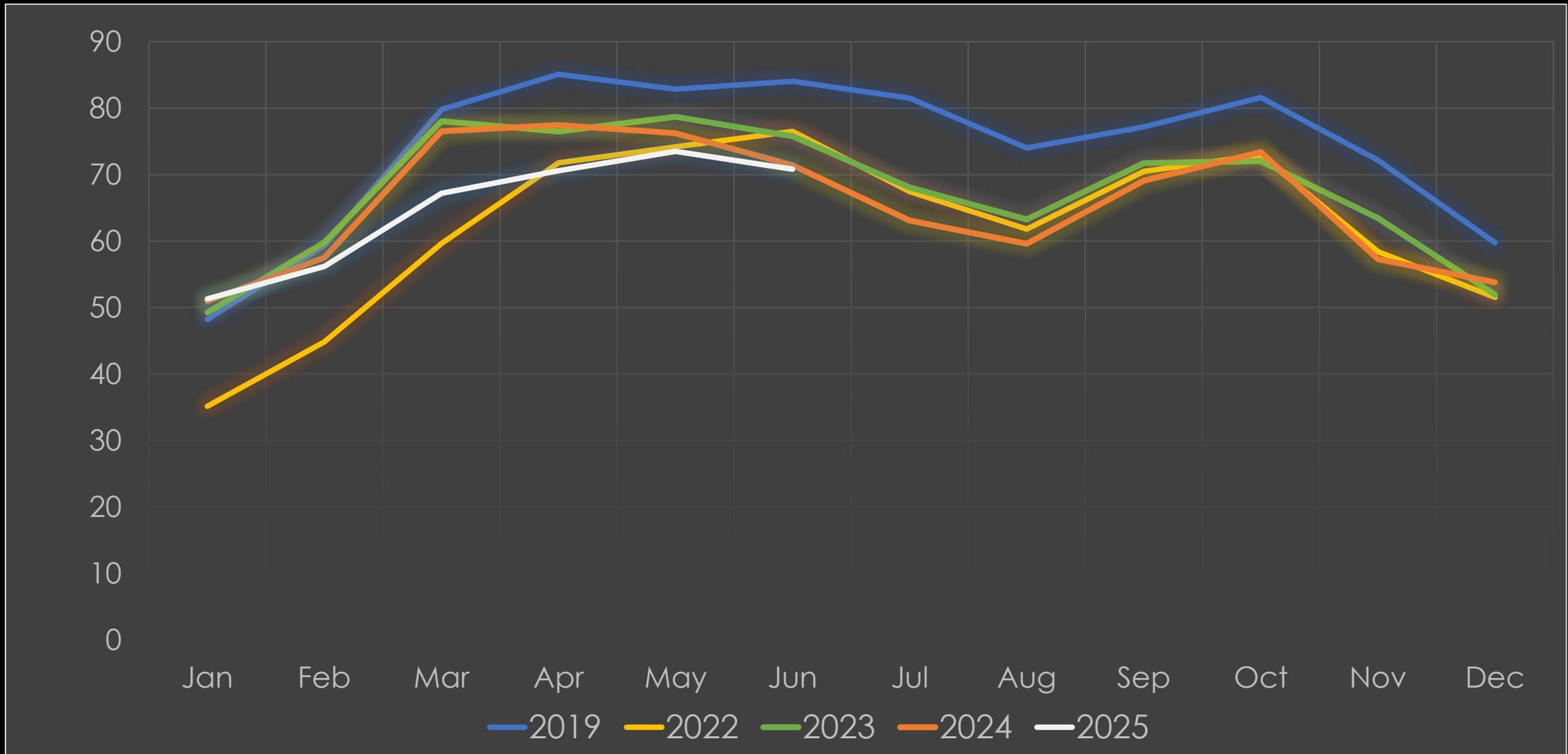
Alexandria Revenue Per Available Room



Source: STR



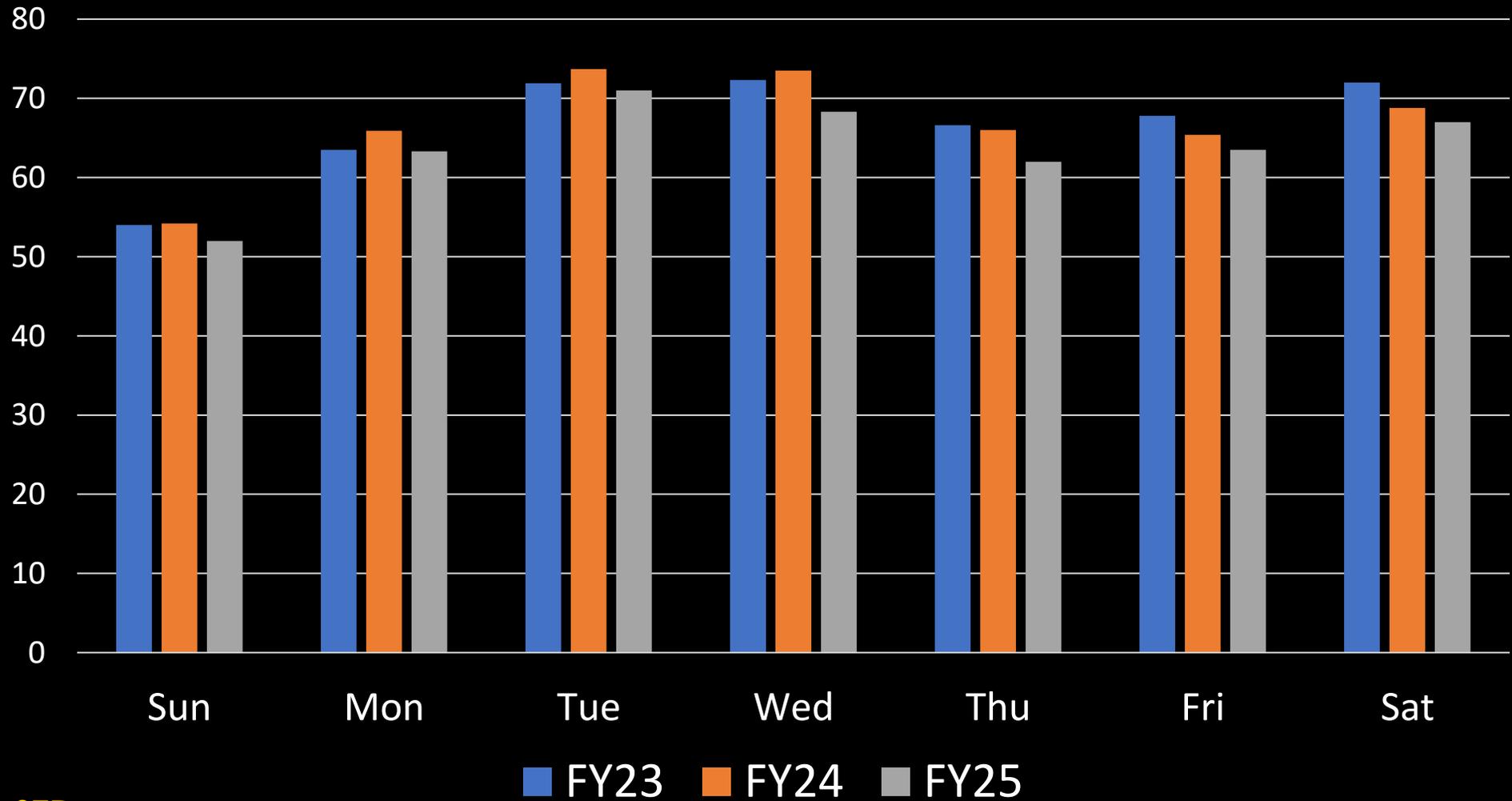
Alexandria Occupancy by Month



Source: STR

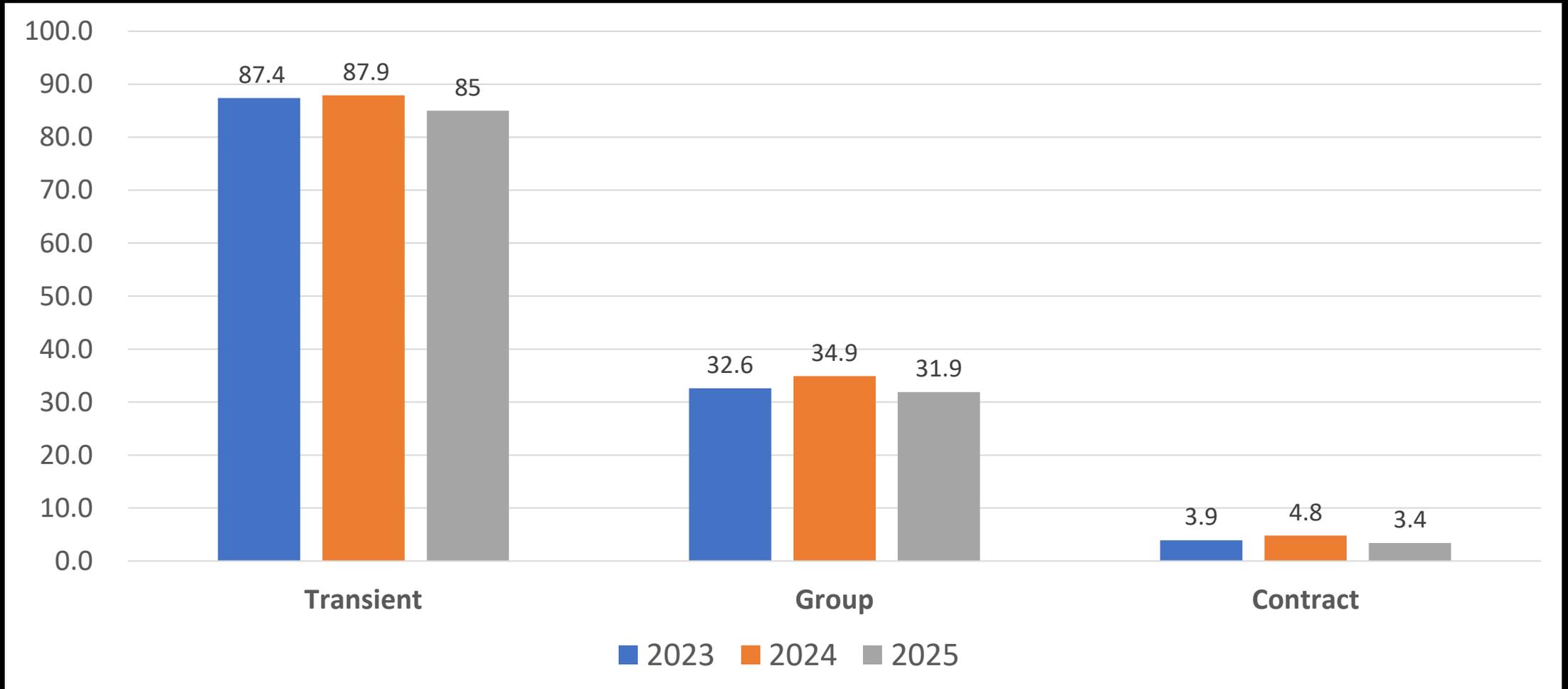


Alexandria Occupancy by Day of Week, FY23-FY25 (July-June)



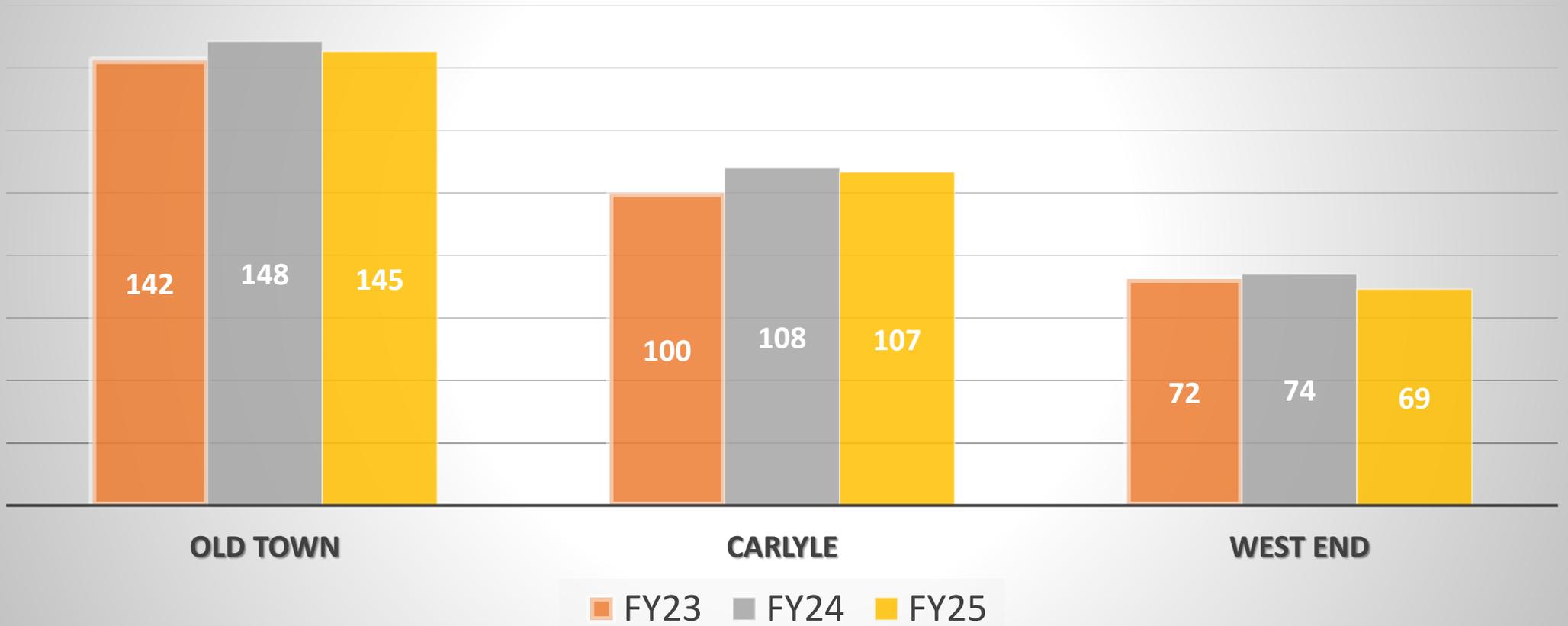
Source: STR

Alexandria RevPAR Contribution by Segment (January-June)



Source: STR

City of Alexandria RevPAR by Submarket (\$), By Fiscal Year (July-June)



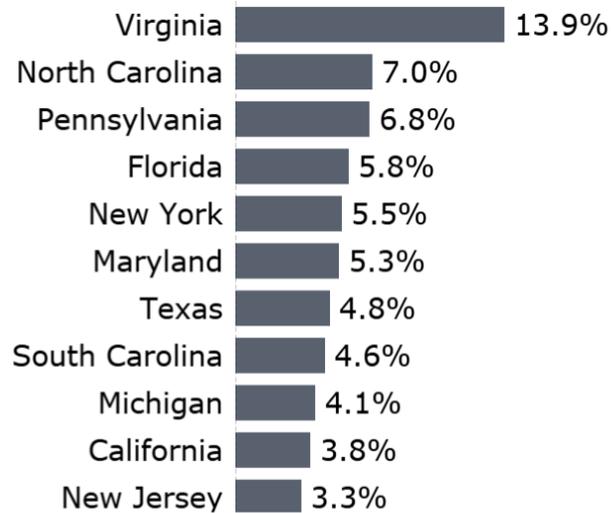
Source: STR

Alexandria Visitors



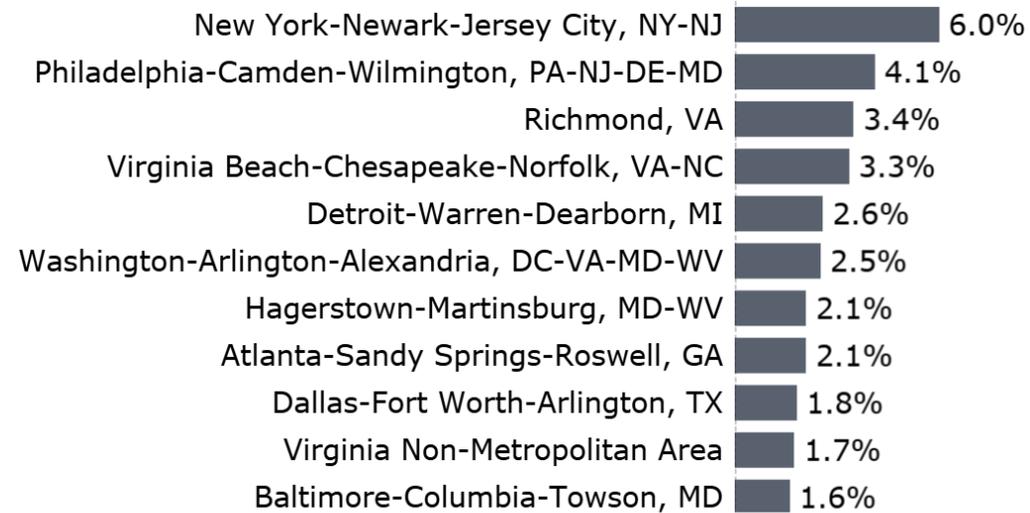
Top Visitor Origin States

% share of total



Top Visitor Origin MSAs

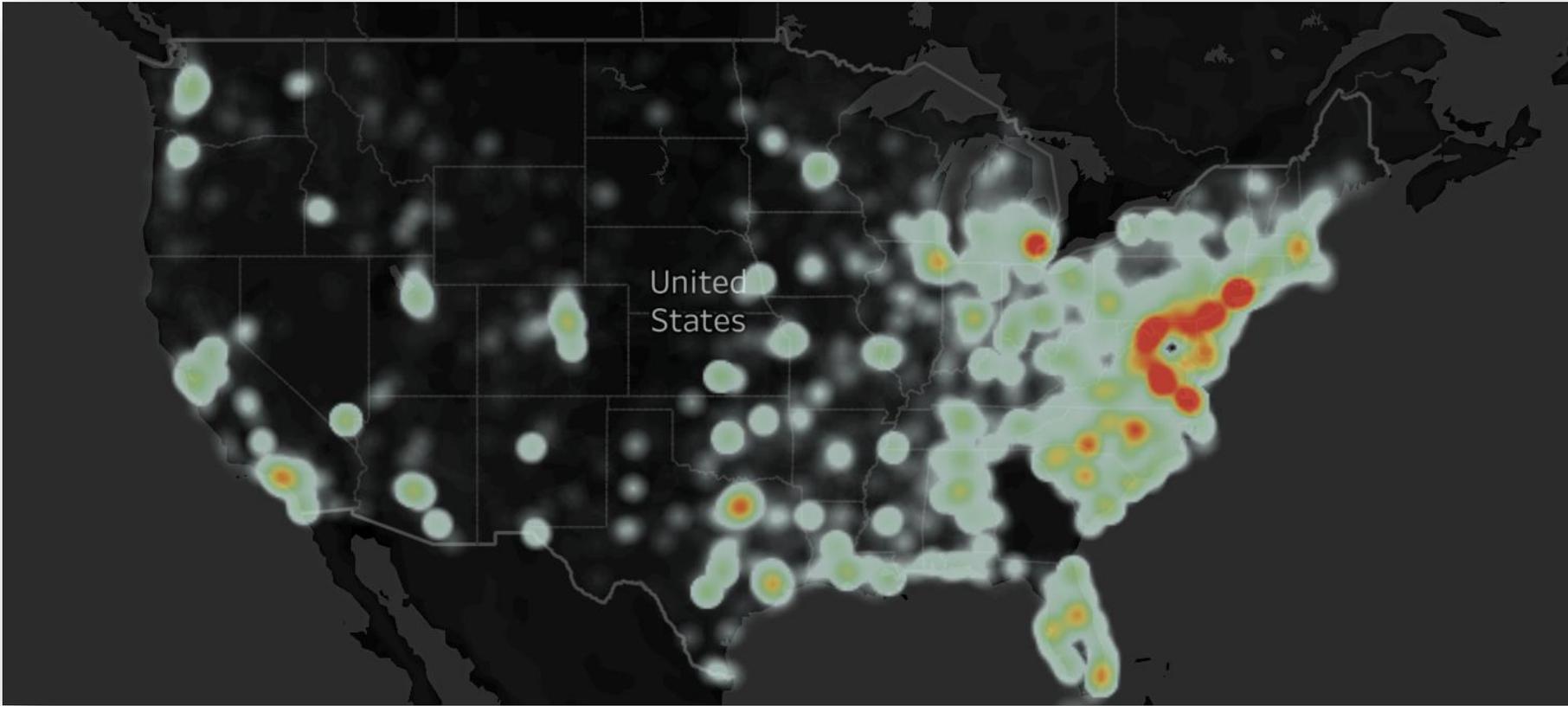
% share of total



Alexandria Overnight Visitors from 50+ Miles

Source: Tourism
Economics Symphony,
July 2024-June 2025





Alexandria Overnight Visitors from 50+ Miles



3.1 days
Avg Length of Stay



63.2%
Repeat

Source: Tourism
Economics Symphony,
July 2024-June 2025



The 2024 Alexandria Visitor: Key Characteristics

Age (mean):		48.2 years
Gender:	% Male	45.4%
	% Female	54.3%
Children in household:		38.0%
Annual Household Income (Mean):		\$84,779
LGBTQ+ (% of Visitors):		7.2%
Non-Caucasian identity (% of Visitors):		33.5%
Top Feeder Markets – States: (% of Visitors):	Virginia	20.2%
	Pennsylvania	9.4%
	North Carolina	6.3%
	Maryland	6.0%
	Florida	5.5%
Purpose of most recent visit:	Leisure	72.0%
	Business	7.4%
	Both	20.6%
Likelihood to revisit Alexandria (next 12 months)*		61.8%
Familiarity with Alexandria**		74.3%
Alexandria's appeal:**		78.2%

Alexandria Visitors from 50+ Miles

Source: Alexandria
2024 Visitor Profile,
Future Partners



Description of Most Recent Alexandria Trip:

Purpose of Trip:

Visiting friends & relatives	44.4%
Leisure	33.4%
Weekend getaway	27.6%

Arrived by personal car	55.3%
Arrived by plane	27.0%

Trip planning start (Avg. weeks in advance of trip) 3.9 weeks

Average travel party size: 2.5 people

Place of Stay in Alexandria:

Hotel/motel	58.8%
Private home of friend(s) or family member(s)	28.4%
Vacation rental (e.g., Airbnb, VRBO, etc.)	16.8%
Bed & Breakfast/ Inn	12.2%

Activities in Alexandria:

Dined out at a restaurant	79.1%
Shopped	60.9%
Took a walking tour	38.1%

Alexandria Visitors from 50+ Miles

Source: Alexandria
2024 Visitor Profile,
Future Partners



- Your Hotel Updates
- What's Working Well
- New Opportunities for Alexandria
- Risks to Mitigate
- Advocacy Needs

**Let's Hear
From You!**



Thank You.

VISIT
alexandria

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