



DESTINATION DC

2015 Advertising Effectiveness & ROI Study— Report of Findings

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Introduction

Project Overview

This report presents the results of an advertising effectiveness and return on investment study conducted by Destination Analysts, Inc. on behalf of Destination DC, the organization charged with marketing the District of Columbia as a global convention, tourism and special events destination. The main objective of this research was to develop an understanding of the reach and impact of the organization's 2015 spring and summer advertising campaigns. These campaigns ran between February and September 2015 and consisted of \$4.0 million in media placement in television, print, radio, out-of-home and online, as well as guerilla marketing in New York City. The campaigns were additionally supported by an ongoing and extensive public relations outreach to gain earned media value for Washington, DC.

Research Objectives

As was done to evaluate five previous advertising campaigns on behalf of Destination DC, Destination Analysts executed a research plan to gather data to:

1. Evaluate the 2015 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 Washington, DC as a travel destination
- Evaluate the campaign's impact on travelers' likelihood to visit Washington, DC

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 District of Columbia, 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. Provide Destination DC with conclusions relative to the campaign's strategy, effectiveness and options for future refinements.

- Evaluate the effectiveness of media options
- Compare the results to previous advertising effectiveness/ROI studies

Methodology

An online survey methodology was again used for this year's research. The goal was to maximize efficiency and reliability, as well as to maintain consistency with past studies

Based on the media purchased for the campaign, the goals of this research require that a large survey sample be collected from across the Eastern and Central United States. Additionally, large subsamples from residents of each of the metropolitan areas targeted by the advertising campaigns were also collected. Survey sampling mirrored the advertising campaign, which focused on attracting visitors from five key metropolitan areas: Boston, MA, New York City, NY, Philadelphia, PA, Richmond, VA and Chicago, IL. However, the reach of the program clearly went well beyond the boundaries of these metropolitan areas. As a result, this study measures the effects of the campaign on travelers living across the broader East Coast, including fourteen Eastern states¹.

¹ "Other East Coast" areas include all residents (outside the four DMAs studied) of Massachusetts, Rhode Island, Connecticut, New York, New Jersey, Pennsylvania, Delaware, Maryland, West Virginia, Ohio, Virginia, North Carolina, South Carolina and Georgia.

As was done in past studies, Destination Analysts contracted with its trusted sample provider—Survey Sampling International, who maintains one of the largest global research panels—to reach out to its panel for survey collection. A survey invitation was sent to a randomly-selected sample of residents from the five selected Designated Market Areas (DMA)² and to a randomly-selected representative sample of residents in the other target states along the East Coast. Again, to be able 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.

	Overall Sample Size	Confidence Interval (95% Confidence Level)
New York DMA	655	+/- 3.8%
Philadelphia DMA	655	+/- 3.8%
Richmond DMA	655	+/- 3.8%
Boston DMA	655	+/- 3.8
Chicago DMA	656	+/- 3.8%
Other East Coast areas	1010	+/- 3.0%
Total	4,286	+/- 1.5%

Weighted Data

As the sampling plan used in this project targeted specific sample quotas in each of the five metropolitan areas, the raw data is not representative of the overall population of residents of the larger area of study. As a result, all data presented in this report is weighted to reflect the actual resident populations in the geographic areas studied.

The remainder of this report presents the study’s findings. The most critical of these—including visitor spending and ROI estimates—are highlighted in Section 4, while complete findings for all survey questions follow in Section 5.

² Nielsen Media Research defines what are called “Designated Market Areas “(or DMA), which are generally a group of counties in which the commercial TV stations in the geographic area achieve the largest audience share. This is a non-overlapping geography used for planning, buying and evaluating audiences across various markets.

Quick Facts:

The profile below shows a summary of the study's key descriptive statistics and findings.

	2008	2009	2010	2013	2014	2015
Unaided interest in visitation to Washington, DC for Leisure Travel:	10.5%	9.6%	9.7%	9.6%	10.5%	9.0%
Traveled to the District of Columbia in the past 12 months:	15.6%	16.2%	15.0%	19.4%	17.7%	15.1%
Gross incremental travel ratio:	8.1%	9.0%	9.2%	13.0%	8.6%	7.6%
Visitor spending in the District of Columbia generated by the campaign:	\$53.4 mil.	\$58.8 mil.	\$52.0 mil.	\$80.2 mil.	\$98.4 mil.	\$138 mil.
Overall Return on Investment per dollar invested:	\$40.00	\$48.00	\$35.00	\$26.72	\$32.80	\$34.52
Tax revenues generated for the District of Columbia:	\$3.7 mil.	\$4.2 mil.	\$3.6 mil.	\$5.3 mil.	\$7.6 mil.	\$10.6 mil.
Tax Return on Investment per dollar invested:	\$2.79	\$3.40	\$2.53	\$1.77	\$2.54	\$2.65
Percent of visitors staying overnight inside the District of Columbia:	44.9%	49.4%	43.4%	51.8%	54.6%	59.6%
Percent of visitors staying overnight in District of Columbia hotels:	35.7%	40.7%	25.6%	31.2%	36.3%	48.0%
Recall of print ads (aided):	14.2%	14.8%	14.3%	14.4%	12.6%	15.6%
Recall of digital display ads (aided):	8.1%	5.9%	9.8%	12.7%	13.0%	15.7%
Recall of digital video ads (aided):	n/a	6.5%	5.8%	8.2%	10.7%	11.6%
Recall pop-up event/live TV event (aided):	n/a	n/a	n/a	10.8%	23.2%	14.7%
Recall pop-up event/ Penn Station, NYC	n/a	n/a	n/a	n/a	n/a	10.1%
Recall pop-up event/BBQ Block Party	n/a	n/a	n/a	n/a	n/a	8.5%
Recall of bus or taxi ads (aided):	n/a	n/a	n/a	n/a	n/a	14.1%
Recall of radio ads (total, aided):	n/a	n/a	n/a	n/a	n/a	2.0%
Recall of any ad (total, aided):	19.0%	20.6%	20.2%	24.1%	30.8%	32.5%
Recall of leisure travel articles about Washington, DC:	12.5%	12.8%	14.0%	13.8%	17.3%	18.4%
Recall of leisure travel TV features about Washington, DC:	11.7%	11.7%	12.2%	12.1%	17.1%	15.8%
Percent agreeing that the advertising "effectively" or "very effectively" portrayed Washington, DC as a place they would want to visit for leisure:	60.4%	59.0%	50.1%	68.7%	66.6%	67.6%
Percent who feel the advertising makes them more likely to visit Washington, DC in the next 12 months:	27.0%	24.8%	23.1%	33.3%	37.7%	38.0%

Executive Summary

This study presents measurements of the reach and impact of Destination DC's 2015 spring and summer advertising campaigns. This \$4.0 million marketing effort ran between February and September 2015. To conduct this study, an online survey was used to collect a large sample from adult residents across the Eastern and Central United States. In total, 4,286 completed surveys were collected. As the sampling plan used in this project targeted specific sample quotas in each of the campaign's five targeted metropolitan areas, the overall data was weighted so that the results presented here accurately reflect the overall population of the larger area of study.

In the Executive Summary following, the key findings from this study are outlined in brief.

Overall Campaign Effectiveness & ROI

- **In total, the advertising campaigns generated 143,554 incremental trips, 59.6 percent of which were taken by visitors who stayed overnight somewhere inside the District of Columbia (in hotels or as guests in private residences).** Of the remaining 40.4 percent of trips, these incremental visitors stayed outside the District and took day trips into the city. In total, these two groups spent \$138 million inside the District of Columbia during the period of study.
- **Visitors staying in District of Columbia hotels were responsible for 73.3 percent of total incremental visitor spending from the campaigns (or \$101 million).** Visitors staying in other locations (District of Columbia private homes and/or anywhere in the suburbs) spent \$36.8 million in the District of Columbia, or 26.7 percent of the total visitor spending impact of the campaign.
- **The amount of taxes generated directly for the District of Columbia government from the campaigns is estimated to be \$10.6 million.** The significant majority of the District of Columbia's tax revenue from the campaigns (approximately \$8.8 million) came from the 14.5 percent hotel tax and 10.0 percent restaurant tax.

Survey Findings

- **The television networks and programs included in the advertising campaign continue to be widely consumed in this region.** Survey respondents were shown a list of television networks and programs that campaign efforts appeared on, and then were asked to select those which they recall watching in the past year. The History Channel and Food Network are popular amongst regional residents, with half of respondents reporting watching these programs at least once in the last 12 months. About forty percent watched Animal Planet, and more than one third watched SyFy, NBC's the Today Show and HGTV. (Figure 5.1, Page 24)
- **Travel, food and lifestyle magazines continue to be popular amongst the advertising's target audience, with nearly 58 percent reporting having read at least one of the magazines on the campaigns' media schedule.** As with television, survey respondents were shown a list of the magazines the campaigns' advertising ran in and were asked to select those which they recall reading or looking through in the past year. The most read amongst the magazines used in the campaign were Food + Wine (17.5%), The New Yorker (15.5%) and Southern Living (14.8%). (Figure 5.2, Page 25)
- **The New York Times website and Orbitz were the most utilized of the online media tested.** Survey respondents were also shown a list of websites that the campaign's digital advertising ran on, and asked which ones they visited at least once in the past 12 months. The most commonly accessed websites were the New York Times website (nytimes.com) (21.9%) and Orbitz.com (20.2%). Southernliving.com (10.4%), NewYorker.com (9.8%), Travelzoo.com (9.4%) and Smithsonian.com (9.1%) each were used by about one tenth of this population. (Figure 5.3, Page 26)
- **Survey findings continue to reflect Google's search market dominance, with over ninety percent of survey respondents saying they had used this search engine in the last year.** Although second to Google, Yahoo!'s search engine was used by 48.4 percent of respondents. Microsoft's search tool, Bing, was used by 43.6 percent of respondents in the past year. In total, 97.8 percent reported using at least one of these search engines. (Figure 5.4, Page 27)
- **12.9 percent of all survey respondents reported having listened to any of the radio stations used in the campaign.** Listenership was naturally higher amongst North Carolina and Virginia residents, where the stations are based. (Figure 5.5, Page 28)
- **Over a quarter (28.5%) report having used United Airlines in the past year.** This reflects a likelihood to have been exposed to Destination DC's in-flight advertising. (Figure 5.6, Page 29)
- **Adult residents of the areas targeted by the advertising took an average of 2.3 leisure trips in the past year.** While 29.9 percent took no leisure trips, and 18.9 percent took only one trip, a majority of adults living in the area of study travels multiple times for leisure each year (51.0%). This population area continues to represent an opportune environment to market Washington, DC as an option for one or more of these trips. (Figure 5.7, Page 30)

- **Washington, DC continues to enjoy notable unaided interest in visitation.** When asked to state the four cities that first come to mind when thinking of a getaway destination with "great hotels, dining, shopping, entertainment, outdoor activities and other unique experiences," nearly one in ten respondents (9.0%) wrote in Washington DC—similar to the rate in 2014 (10.5%). (Figure 5.8, Page 31)
- **Washington, DC continues to capture a significant share of regional visitor traffic. Those survey respondents who reported having traveled at least once for leisure in the past year were then presented a list of cities and asked which they had visited in the last twelve months.** As in previous years, New York City was the top regional destination, with 30.7 percent of regional residents having visited the city in the past year, followed by Atlanta, GA (17.9%) and Philadelphia, PA (16.6%). Washington, DC—the fifth most visited regional destination—had a 15.1 percent visitation rate amongst this group. (Figure 5.9, Page 32)
- **Times Square continues to be a high-value location for reaching the desired audience.** Survey respondents were asked if they had visited Times Square at any point in July, August, and/or September 2015 (the period a campaign advertisement ran there.) In total, 21.9 percent of survey respondents reported visiting Times Square within that three-month period. (Figure 5.10, Page 33)
- **Penn Station is also a similarly well-trafficked location by potential visitors.** Survey respondents were asked if they had visited Penn Station at any point in March 2015—the period when Destination DC ran advertising inside there. In total, 23.6 percent of survey respondents reported visiting Penn Station within that month-long promotional period. (Figure 5.11, Page 34)
- **Regional Washington, DC visitors took an average of 2.9 trips to the city.** While the majority of survey respondents said they took just one leisure trip to the District of Columbia (55.2%), over 40 percent took multiple trips to the city for leisure. (Figure 5.12, Page 35)
- **Visitation to Washington, DC amongst regional residents was at its lowest point in February (11.8%) and highest in April (23.6%) and August (24.5%) 2015.** (Figure 5.13 Page 36)
- **Visiting friends and relatives (VFR), weekend getaways and vacations are significant tourism drivers to Washington, DC amongst regional travelers.** Respondents visiting Washington, DC 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—at nearly identical likelihood—were “visit friends or family” (27.1%), a "weekend getaway" (26.4%) and "vacation" (26.3%). 15.8 percent reported visiting Washington, DC to “attend an event”. (Figure 5.14, Page 37)
- **The greatest proportion of these Washington, DC visitors stayed overnight for their trip and in traditional paid accommodations like hotels (55.8%).** With 27.1 percent reporting coming to Washington, DC specifically to visit friends and family, an identical number (27.1%) stayed overnight at the residence of a friend or family member. Just 3.4 percent of these visitors used

a home share (AirBnB, etc). One fifth (20.7%) of regional Washington, DC visitors were on a day-trip (or just passing through) and thus did not require lodging. (Figure 5.15, Page 38)

- **Regional overnight visitors to the Washington, DC area are likeliest to stay in paid accommodations in the city.** Those who stayed overnight in the Washington, DC area during their most recent trip were asked the location(s) of where they stayed overnight. Over half of regional overnight visitors stayed in accommodations within the District of Columbia (59.6%). Of those that stayed outside the District, northern Virginia continued to be a more popular lodging destination than southern Maryland (33.2% vs. 17.6%). (Figure 5.16, Page 39)
- **The typical regional Washington, DC visitor surveyed spent an average of 3.6 days within the metropolitan area.** As regional residents don't generally have to travel extensive distances to visit Washington, DC—and the reported purpose of many of these trips was for weekend getaways, to visit friends and family, or to attend an event—this may warrant shorter trips. (Figure 5.17, Page 40)
- **The District of Columbia captures a significant portion of regional visitors' overall trips.** Of the 3.6 days typically spent in the metropolitan area, on average, 3.1 of those days were spent inside the District of Columbia. (Figure 5.18, Page 41)
- **Washington, DC visitors who stayed overnight in paid accommodations (such as a hotel or motel) reported spending \$870.69 per day in the city on average.** The largest proportions of this spending were on lodging (\$274.77) and restaurants & dining (\$195.25). (Figure 5.19, Page 42)
- **Visitors who did not stay in paid accommodations in the District of Columbia spent less overall and on each individual spending category than their counterparts who stayed in District of Columbia hotels/motels.** These visitors spent on average \$329.06 per day in the District of Columbia, largely on restaurants & dining (\$116.54), retail purchases (\$70.13), transportation-related expenditures (\$39.07) and entertainment (\$48.60). Given this disparity in average spending, the survey findings continue to show that Destination DC can (and does) maximize in-market visitor spending generated through its marketing efforts by motivating visitors to stay in District of Columbia hotels. (Figure 5.20, Page 43)
- **Reported visitor spending covered 2.3 persons on average, making the mean per-person, per day spending represented by regional District of Columbia hotels guests \$380.88, and \$143.95 for those who did not stay in paid accommodations within the District.** (Figure 5.21, Page 44)
- **The typical regional Washington, DC visitor had 2.5 people in his or her travel party.** The greatest proportion of visitors was traveling with just one other person (44.6%). 42.0 percent were in groups of three or more, while just 13.4 percent visited Washington, DC solo. (Figure 5.22, Page 45)

- **The majority—62.8 percent—of regional Washington, DC visitors are traveling with just adults.** While Washington, DC is primarily an adult destination, the city does attract a significant number of family travelers. 37.2 percent of visitors had at least one child in their party. (Figure 5.23, Page 46)
- **For regional travelers, interest in Washington, DC's famed—and largely free—monuments and museums, and its historical significance continue to be the most important motivating factors in choosing the destination.** Survey respondents were asked to select (from a list) the factors that were important to their decision to make their most recent visit to the city. The most commonly selected factors were "museums" (58.5%), "historical attributes" (46.6%), "monuments" (46.5%), and "free attractions" (43.1%). (Figure 5.24, Page 47)
- **Six in ten residents in the areas targeted by the advertising feel they are at least "somewhat familiar" with Washington, DC as a leisure destination; of these, 19.3 percent describe themselves as "very familiar."** In comparison, about one-in-five regional residents feel they are "not at all familiar" with D.C as a place to visit. (Figure 5.25, Page 48)
- **Washington, DC continues to enjoy a high degree of potential to attract regional travelers to visit the city for leisure—and stay in hotels—in the coming year.** Half of survey respondents (51.6%) say they have at least some likelihood to visit Washington, DC in the next twelve months, with one-in-ten saying they will "certainly" visit. When asked what type of accommodations they are likeliest to stay in on their next leisure trip to Washington, DC, nearly three quarters said "hotel." 13.2 percent said they would stay with friends or family and 7.3 percent expected to stay in a vacation home rental or shared home. (Figure 5.26, Page 49)
- **Unaided recall of Washington, DC advertising amongst regional residents stood at 18.4 percent.** Before being shown any of the campaigns' advertisements, nearly one in five survey respondents said with certainty that they recalled seeing an ad for leisure travel to Washington, DC in the past 12 months. 18.0 percent thought they "maybe" had. 63.6 percent could not initially recall seeing any of these advertisements. (Figure 5.27, Page 50)
- **Washington, DC tourism advertising is primarily recollected (in an unaided format) in television, followed by magazines and online media.** Respondents who said they recalled seeing advertising for leisure travel to Washington, DC in the past year were asked to select the media in which they had seen this advertising. Survey respondents were likeliest to cite seeing Washington, DC travel advertising on television (48.5%), in magazines (44.0%) and/or online on their desktop, laptop or tablet (43.3%—comparatively, 27.7% recalled seeing Washington, DC advertising on their mobile device). Given these results, regional residents were likely to have been exposed to Washington, DC tourism messages across multiple media (Figure 5.28, Page 51)
- **In total, 15.6 percent recalled seeing Destination DC's ads in magazines.** 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. 15.6 percent had. This is up from last year, when 12.6 percent of respondents saw these print ads.(Figure 5.29, Page 52)

- **Penetration by the campaign's television advertisements reached more than one in ten regional residents.** Fully 11.6 percent of survey respondents said they recall having seen one or more of the ads on television. Last year, 13.2 percent of respondents recalled seeing the television advertisements. (Figure 5.30, Page 53)
- **Respondents were then shown the digital display advertisements used in the campaign and were asked if they had seen these ads anywhere online.** 15.7 percent said they had in fact seen these ads online, up from 13.0 percent in 2014. (Figure 5.31, Page 54)
- **Almost two in ten regional residents (17.3%) said they recalled seeing the campaign's video ad in the past year.** One in ten of this group recalled seeing it in Times Square. (Figure 5.32, Page 55)
- **The Today's Show stunt reached a large audience.** Respondents were shown images of the guerilla marketing efforts on The Today Show. They were then asked if they had recalled seeing this promotion. Nearly fifteen percent of respondents said they had seen this effort (14.7%). (Figure 5.33, Page 56)
- **8.0 percent of respondents recalled seeing the pop-up event in Penn Station, New York City.** (Figure 5.34, Page 57)
- **Recall of the campaign's promotion as part of the New York City's BBQ Block Party was at 2.1 percent amongst all respondents.** (Figure 5.35, Page 58)
- **Bus and Taxi ads also had significant reach.** Respondents were asked if they had seen the campaign's bus and taxi advertisements that ran in key markets. 14.1 percent of respondents said they had. (Figure 5.36, Page 59)
- **2.0 percent of all respondents said they had heard the radio ads.** (Figure 5.37, Page 60)
- **1.1 percent of all respondents recalled the advertising for Washington, DC that was part of Baltimore Magazine's Best of Baltimore event.** (Figure 5.38, Page 61)
- **The advertising creative is effective at positioning Washington, DC as an attractive leisure destination.** After viewing the major creative components of the campaign, respondents were asked how effective the ads are in portraying Washington, DC as a place they would enjoy visiting for leisure reasons. The advertising creative continues to increase its effectiveness at positioning Washington, DC as an attractive leisure destination. Slightly up from what was seen in the 2014 campaign, two-thirds of survey respondents (67.6%) felt that the 2015 campaign creative is "effective" or "very effective" in portraying Washington, DC as a place they would enjoy visiting for leisure. Only 7.7 percent felt that this year's advertising was "ineffective" or "very ineffective" towards this objective. (Figure 5.39, Page 62)
- **The 2015 advertising campaigns appear to best communicate that Washington, DC is a destination that offers a lot to see and do beyond monuments and is good for families.**

Destination DC's consumer advertising had several messaging goals that it was tasked with accomplishing. Survey respondents were asked to use a scale to rate how effective the advertising was overall in portraying Washington, DC in the ways that the campaigns intended. There was the most agreement that the campaign advertising effectively portrayed Washington, DC as "a place with lots to see and do in addition to monuments and museums" (74.2%) Many other messages—including being a good place for a family vacation—performed strongly, as well. (Figure 5.40, Page 63)

- **Nearly four in ten respondents (38.0%) felt that the ads made them more likely to visit Washington, DC (nearly equal to last year's 37.7%, and up from 33.3% in 2013 and 23.1% in 2010).** Only 3.9 percent said the ads had a negative effect on their likelihood to visit, while 6.6 percent were unsure. The remaining half said they were "Unchanged. I am not more or less likely to visit Washington, DC for leisure in the next 12 months." (Figure 5.41, Page 64)
- **This year, the advertising was motivational to a significantly larger proportion of regional Washington, DC visitors.** Those survey respondents who reported having made at least one trip to the District of Columbia during the campaign period 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 Washington, DC. 68.8 percent of these persons reported that the advertising did indeed influence their decision to visit the District of Columbia. This figure increased from 49.9 percent in 2014 (Figure 5.42, Page 65)
- **Amongst those exposed to it, the advertising plays an important role in the ultimate decision to visit Washington, DC.** Those survey respondents who reported having made at least one trip to the District of Columbia in the past year and who recalled seeing at least one of the ads were asked how important the advertising was to their decision to visit Washington, DC. Illustrating the impact of the campaign on those exposed to it, nearly all respondents report that the advertisements were either "Important" or "Very important" to their ultimate decision to visit Washington, DC (93.4%). (Figure 5.43, Page 66)
- **The campaign was effective at reaching people in the top of the travel planning funnel.** 47.1 percent report having been at a point of potential influence, meaning they had not already made up their mind to visit Washington, DC when they saw the advertising. (Figure 5.44, Page 67)
- **Public relations outreach efforts resulted in earned media for Washington, DC that was recalled by those targeted by the advertising.** 18.4 percent of survey respondents reported having seen articles—either digitally or in print—about leisure travel to Washington, DC in the past year, up from 17.3 percent in 2014. In total, 15.8 percent reported having seen a similar story or feature on television, down slightly from 17.1 percent in 2014. (Figures 5.45 and 5.46, Pages 68 and 69)
- **Washington, DC's presence in social channels—and potential influence—looks to be widespread.** Survey respondents were asked if they recalled seeing social media posts by their

friends and family about travel to Washington DC. Nearly one quarter (23.8%) said that recall such posts in the past 12 months. (Figure 5.47, Page 70)

- **In total, 49.4 percent said they were “likely” or “very likely” to recommend Washington DC as a place to visit.** Another 29.2 percent said they were “somewhat likely”. (Figure 5.48, Page 71)
- **Destination DC’s emoji’s appear effective at generating good will for the destination.** As a final core question, survey respondents were shown Washington, DC emojis developed by Destination DC. These were well-rated by survey respondents, with nearly one in five (17.5%) saying they generated a very positive feeling about the city. Very few potential visitors gave these emojis a negative rating.(Figure 5.49, Page 72)
- **Survey respondents skewed female, with 57.4 percent being women.** (Figure 6.1, Page 73)
- **The mean age of survey respondents is 48.2 years. 31.1 percent are between the ages of 21 and 34.** (Figure 6.2, Page 74)
- **The majority of survey respondents are employed in some capacity (59.5%).** 39.2 percent are employed full-time and another 7.4 percent are self-employed. 12.8 percent are employed part-time. (Figure 6.3, Page 75)
- **Nearly three quarters of survey respondents have at least some college education.** 38.2 percent holds a bachelor’s degree, including 15.2 percent who have some graduate school education or more. (Figure 6.4, Page 76)
- **The average annual household income of survey respondents is \$63,127 with 50.6 percent having an annual household income above \$50,000.** (Figure 6.5, Page 77)
- **The vast majority (71.8%) of respondents identifies as Caucasian. 14.1 percent is African-American. Asian-Pacific Islanders represented 4.5 percent of respondents and Latino-Hispanics 6.3 percent.** (Figure 6.6, Page 78)
- **55.2 percent of survey respondents reported being married or in a domestic partnership. 40.8 percent are single. 17.7 percent has children under age 18.** (Figure 6.7, Page 79)
- **Approximately 6 percent of survey respondents identifies as LGBT.** (Figure 6.8, Page 80)

Return on Investment Analysis

Advertising Effectiveness and Program ROI Evaluation

This research is the sixth annual advertising effectiveness study conducted for Destination DC. In this report, we present estimates of the 2015 advertising campaign's effectiveness in attracting visitors to Washington, DC in the period from February to September 2015. The technique employed in this study to evaluate the advertising campaigns' effectiveness is identical to what was used in previous years.

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

Evaluating the Campaign's Reach

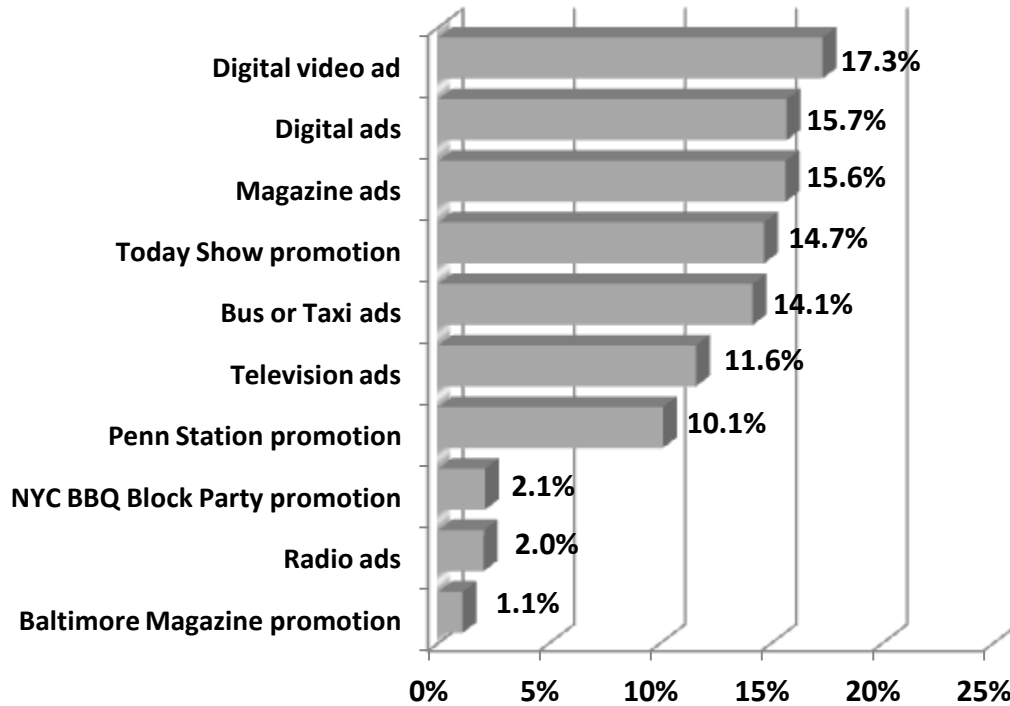
The survey asked respondents (in an unaided question) if in the past 12 months they recalled seeing any advertisements (in magazines, online, radio, television, out-of-home and/or at events) for leisure travel to Washington, DC. 18.4 percent of respondents recalled seeing such advertisements, with an additional 18.0 percent uncertain.

Survey respondents were also asked to look at (or listen to) the campaign's advertisements [print, online display, online video, radio, television, out-of-home, and special promotions] and 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 recalls having seen each type of advertisement.

Among the advertising types tested, the digital video advertisement the most widely recalled, with 17.3 percent of all respondents having seen this advertisement. This marks an increase from 10.7 percent last year. A total of 11.6 percent of all survey respondents recalled seeing the campaign's (paid) television advertisements. In total, 20.1 percent reported having seen either video creative. 15.7 percent remembered seeing the digital display ads slightly up from 2014). 15.6 percent recalled the magazine ads, up from 12.6 percent last year. Likely because these advertisements/promotions ran in singular or limited markets, the media of lowest overall aided recall rates amongst the entire surveyed population were the campaign's

promotions at events in New York's Penn Station (10.1%), at the NYC BBQ Block Party (2.1%), and Baltimore Magazine's Best of Baltimore event (1.1%), as well as the radio ads (2.0%)

Figure 4.1: 2013 Overall Advertising Recall (Percent of all respondents who recall seeing advertisements – Aided Recall)



Note: Figures shown here for the outdoor video ad and radio ads are based on all respondents in all areas. Numbers shown later in this report are based on the specific DMAs where these advertisements ran.

The campaign's absolute reach was widespread. Figure 4.2 (following) shows the proportion of survey respondents in each geographic area who report seeing each type of advertisement. Recall rates in the specific markets aligned the proportion of media placement the market received, with the New York DMA having the relative highest recall rates (45.0%) and the Chicago DMA having the relative lowest (26.6%). At least one in four residents of each area studied recalled the campaign.

Figure 4.2: Advertising Recall by Geographic Area

	Total	New York DMA	Philadelphia DMA	Richmond DMA	Boston DMA	Chicago DMA	East Coast (minus DMAs)
Digital video ad	17.3%	23.2%	11.9%	18.5%	14.3%	11.8%	16.9%
Digital banner ads	15.7%	23.4%	14.0%	16.0%	13.7%	12.4%	14.3%
Magazine ads	15.6%	24.6%	15.1%	16.6%	15.1%	10.7%	13.8%
Today Show promotion	14.7%	21.4%	12.4%	12.8%	13.4%	12.2%	13.5%
Bus or Taxi ads	14.1%	29.3%	16.8%	10.5%	15.1%	10.8%	10.2%
Television ads	11.6%	17.7%	7.6%	8.4%	10.8%	7.9%	10.8%
Penn Station promotion	10.1%	24.0%	7.8%	6.0%	5.9%	5.5%	7.5%
NYC BBQ Block Party promotion	2.1%	5.2%	2.1%	1.5%	1.7%	1.8%	1.4%
Radio ads	2.0%	na	na	13.9%	na	na	2.9%
Baltimore Magazine promotion	1.1%	na	na	na	na	na	1.7%
SAW ANY ADVERTISEMENT	32.5%	45.0%	31.9%	37.7%	29.7%	26.6%	29.9%

Media Overlap

In total, 25.9 percent of survey respondents recalled having seen two or more of the advertising types tested, (Figure 4.3, below). 32.5 percent of residents of the overall study area saw at least one of the ads (up from 30.0 percent in 2014).

Figure 4.3: Number of Advertising Media Where Ads Were Seen

	Total	New York DMA	Philadelphia DMA	Richmond DMA	Boston DMA	Chicago DMA	East Coast (minus DMAs)
One or more ads recalled	32.5%	45.0%	31.9%	37.7%	29.7%	26.6%	29.9%
No ads recalled	67.5%	55.0%	68.1%	62.3%	70.3%	73.4%	70.1%
One	7.6%	10.1%	9.0%	10.1%	7.2%	9.5%	6.6%
Two	6.0%	6.1%	6.7%	9.2%	6.6%	4.6%	5.9%
Three	4.6%	5.2%	5.6%	5.3%	3.8%	3.2%	4.5%
Four	2.4%	2.7%	2.6%	3.8%	3.0%	1.5%	2.3%
Five or more	11.9%	20.9%	7.9%	9.3%	9.1%	7.8%	10.6%

Media Effectiveness

Using the percent of survey respondents who recalled having seen Washington, DC advertisements, we can calculate estimates of the number of impressions³ each type of advertising received. Figure 4.4 following shows the calculation of the cost per impression using aided awareness statistics collected in the survey. Out of Home/Events⁴ were the most efficient for recall, having the lowest costs per impression (\$0.01). The relatively highest cost per impression was for the magazine advertisements (\$0.11/impression).

Figure 4.4: The Cost of Advertising Impressions by Media (Aided)

	Impressions	DDC Investment	Cost per impression
Print	14,434,761	\$1,614,421	\$0.11
Television	10,003,940	\$786,253	\$0.08
Online	28,458,539	\$1,129,190	\$0.04
Radio	1,758,983	\$24,999	\$0.01
Out of Home/Events	35,409,450	\$293,797	\$0.01
TOTAL	90,065,673	\$3,848,660	\$0.04

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 the District of Columbia 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.

The technique used in this study to estimate incremental visitation is identical to the technique used by Destination Analysts in past years, and at its core, similar to research conducted in 2006 and 2007 by another research firm⁵. As the survey identifies travel that would not have happened without the advertising, the technique used here compares travel incidence between the population of persons in the geographic area of study who were exposed to the advertising and those who were not exposed to the advertising. The level of travel among those with no ad awareness is considered the baseline, and the difference between these two

³ 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.

⁴ Today show stunt, bus or taxi ads, Penn Station and NYC BBQ Block Party promotions.

⁵ Washington, DC CTC., Ad Effectiveness & ROI Research, SMARI, October 2006 & 2007

groups is used to extrapolate **gross incremental visitation**⁶ to Washington, DC. The model then takes an additional step to make the estimates as accurate as possible. To do this, the model extracts from the aforementioned gross incremental visitation estimates all visitation by leisure travelers who (1) came to Washington, DC on leisure trips which were motivated by a desire to attend a personal event, (2) extended a business trip to accommodate leisure activities, (3) had made up their mind to visit the District of Columbia before being exposed to the advertising campaign and/or (4) did not report that the advertisements influenced their decision to visit⁷. Hence, an adjustment factor was developed to effectively subtract this travel from gross incremental visitation. The chart below illustrates this calculation.

Calculation of Incremental Visitation



Examining survey respondent travel patterns between February and September 2015, an overall factor for incremental visitation was calculated at 7.6 percent. This figure represents the difference between persons visiting Washington, DC during the period of study who recall seeing the ads and those who do not recall seeing any advertisements. While this overall figure is informative, the design of this research also seeks to estimate incremental visitation for each of the five specific geographic areas studied.

Figure 4.6 (following) shows the study's estimates of incremental visitor volume and spending⁸ in detail. In total, we estimate that the advertising campaign generated 958,826 incremental trips, 59.6 percent of which were taken by visitors who stayed overnight inside the District of Columbia. Of the remaining 40.4 percent of trips, these incremental visitors stayed outside the District and took day trips into the city. In total, these two groups spent \$138 million inside the District of Columbia during the period of study.

⁶ Gross incremental visitation is defined here as the population aware of the advertisements multiplied by an incremental visitation factor, which is the difference in visitation levels among those who saw the advertising and those who did not. The assumption is that those who did not see advertising represent the level of baseline travel, or that which would happen with or without the ad campaign. Any higher level of travel among those who saw advertising is attributable to the advertising and is considered incremental travel. For example, in the New York DMA, 17.6 percent of those who reported seeing at least one advertisement visited Washington, DC during the period of study, while only 6.4 percent of those who did not see an ad visited. The difference between these two numbers (or 11.2%) is the incremental travel factor for the New York DMA. In this study, the overall incremental travel factor for the region is calculated from the bottom up using these DMA level incremental travel factors for each DMA.

⁷ These data were collected for the survey respondent's most recent trip to the District of Columbia.

⁸ The model uses a bottom-up technique to calculate the gross totals for the region as a whole. Estimates prepared for each geographic region are summed to develop the overall total.

Figure 4.5: Incremental Visitation & Spending in Washington, DC

R O W		Total	NY DMA	Philadelphia DMA	Richmond DMA	Chicago DMA	Boston DMA	East Coast (minus DMAs)
A	Adult population	86,369,554	14,553,192	5,433,694	1,093,813	4,848,596	4,471,696	55,968,564
B	Percent aware of ads	32.3%	44.0%	31.9%	37.7%	29.7%	26.6%	29.9%
C	Population aware of ads (A*B)	27,909,572	6,398,961	1,733,805	412,476	1,441,275	1,187,901	16,735,155
D	Incremental travel	7.6%	11.2%	4.7%	0.8%	10.8%	1.9%	6.9%
E	Average travel party size	2.5	2.5	2.3	2.5	2.6	2.3	2.5
F	Gross incremental trips taken ((C*D)/E)	859,054	286,366	35,661	1,360	60,523	10,117	465,026
G	Adjustment factor	12.3%	22.7%	18.2%	9.5%	17.2%	1.8%	13.2%
H	Adjusted incremental trips (F*G)	143,554	64,910	6,484	129	10,435	177	61,418
	Place of stay							
	Washington DC							
I	Hotel, motel or inn	48.0%	58.9%	43.3%	29.2%	65.5%	35.8%	45.5%
J	VFR or Other	11.6%	8.2%	10.0%	9.2%	17.2%	11.3%	13.0%
K	Suburbs	40.4%	32.9%	46.7%	61.5%	17.2%	52.8%	41.6%
L	Incremental trips by place of stay							
	Place of stay							
	Washington DC							
M	Hotel, motel or inn (H*I)	75,900	38,234	2,810	38	6,837	64	27,917
N	VFR or Other (H*J)	15,791	5,335	648	12	1,799	20	7,976
O	Suburbs (H*K)	51,863	21,340	3,026	80	1,799	94	25,525
	ALL VISITOR SPENDING							
P	Total spending per travel party	\$961.84	\$1,140.34	\$400.63	\$375.06	\$1,795.29	\$646.93	\$692.99
Q	Lodging	\$33,580,488	\$19,892,124	\$666,135	\$11,306	\$3,807,877	\$23,689	\$9,179,357
R	Restaurants	\$39,177,792	\$15,893,973	\$703,056	\$13,327	\$4,506,855	\$31,607	\$18,028,974
S	Retail	\$15,876,331	\$9,008,940	\$349,251	\$8,639	\$2,850,907	\$23,580	\$3,635,013
T	Entertainment & Sightseeing	\$34,541,799	\$20,412,369	\$513,974	\$9,518	\$5,455,253	\$23,174	\$8,127,512
U	Gas, parking & transportation	\$9,906,717	\$5,218,577	\$313,109	\$4,691	\$1,174,601	\$11,053	\$3,184,687
V	Other	\$4,993,242	\$3,593,131	\$52,081	\$977	\$938,533	\$1,726	\$406,794
W	TOTAL	\$138,076,368	\$74,019,115	\$2,597,606	\$48,458	\$18,734,025	\$114,828	\$42,562,336
	Total tax revenues generated for Washington, D.C. =			\$10,591,443				

Incremental Tax Revenue

Visitor spending generates taxes. The District of Columbia has several taxes which impact travelers, including a transient occupancy tax (hotel tax), retail sales taxes and taxes on dining and transportation related items. Using the detailed incremental spending estimates outlined above, we calculate the amount of taxes generated directly for the District of Columbia government from the Spring and Summer campaigns to be \$10.6 million. The majority of this tax revenue came from the hotel tax (\$4.9 million) and the restaurant tax (\$3.9 million).

Figure 4.6: Incremental Taxes Generated for Washington, DC, 2015

	Total Tax Revenues Generated for Washington DC	General fund	Washington Convention Center Authority
Lodging	\$4,869,171	\$3,374,839	\$1,494,332
Restaurants	\$3,917,779	\$3,526,001	\$391,778
Retail	\$912,889	\$912,889	\$0
Entertainment & Sightseeing	\$0	\$0	\$0
Gas, parking & transportation	\$891,605	\$891,605	\$0
TOTAL	\$10,591,443	\$8,705,334	\$1,886,110
Tax rates used in these calculations include a 5.75% sales tax, 10% restaurant meals tax, 10% rental vehicles tax, 18% parking tax for commercial lots, and 14.5% hotel tax			

Figure 4.7: Return on Investment

With a total media and production spend of \$4.0 million; we calculate an overall ROI of Destination DC’s advertising campaign to the District of Columbia of \$34.52 per dollar invested, and a tax ROI of \$2.65 per dollar invested.

	2015
Incremental Visitor Spending	\$138,076,368
Destination D.C. program investment	\$4,000,000
Overall return on Investment	\$34.52
Tax return on Investment	\$2.65

Destination DC's Impact Beyond the Advertising Campaign

It is important to note that Destination DC's economic impact to Washington, DC is not limited to the effectiveness of its consumer advertising campaign. For example, as noted in the survey findings, the organization's public relations led to nearly one in five regional residents seeing travel stories and/or features about leisure travel to Washington, DC in print and television media in the past year. Given that these are typical sources in which travelers draw destination inspiration, it is likely that this media had an effect in motivating visitation to Washington, DC. In addition Destination DC leads marketing efforts in the domestic tour/group and international markets, including:

- Domestic work with groups/tour operators
- International work with groups/tour operators
- International promotions with airlines, other partners and Brand USA
- Domestic and international leisure travel and convention trade shows
- Convention trade advertising

While these programs are not specifically studied by this research, they are likely to generate additional visitor spending and thus economic impact to Washington, DC and surrounding areas.

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. The data presented in the following pages are the weighted results for all surveys collected, and hence are representative of the behaviors and opinions of the entire geographic areas of study.

Television Networks and Programs Watched in the Past Twelve Months

Survey respondents were shown a list of television networks and programs that campaign efforts appeared on, and then were asked to select those which they recall watching in the past year. The History Channel and Food Network are popular amongst regional residents, with half of respondents reporting watching these networks at least once in the last 12 months. About forty percent watched Animal Planet, and more than one third watched SyFy, NBC's the Today Show and HGTV.

Figure 5.1: Which of these television networks and programs have you watched at least once in the past 12 months?

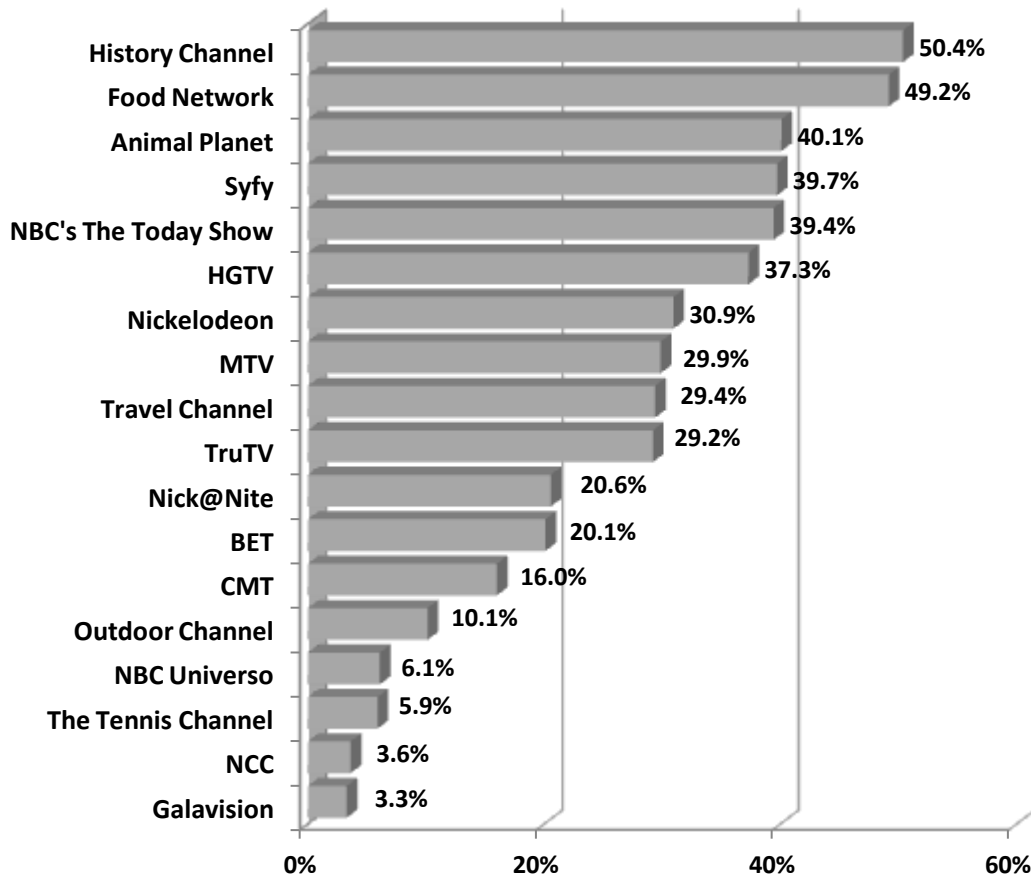


FIGURE 5.1 - Question: Which of these television networks and programs have you watched at least once in the past 12 months? Base: All survey respondents (weighted data). 4,286 completed surveys.

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 recall 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, lifestyle and local magazines continue to be popular amongst regional residents. Nearly 58 percent reported having read at least one of the magazines on the campaign media schedule. The most read amongst the magazines in the campaign were *Food & Wine* (17.5%), *The New Yorker* (15.5%) and *Southern Living* (14.8%).

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)

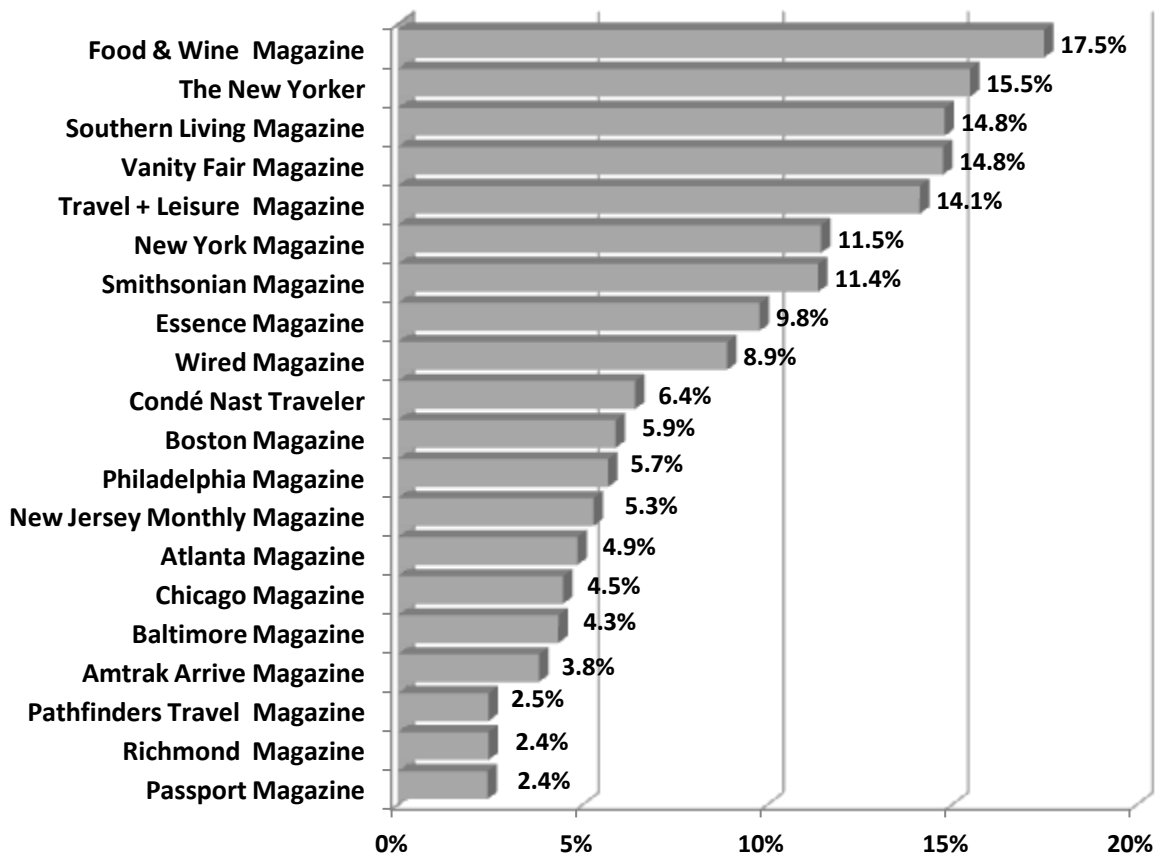


FIGURE 5.2 - Question: Which of these magazines do you recall reading or looking through at least once in the past 12 months? (Select all that apply) Base: All survey respondents (weighted data). 4,286 completed surveys.

Websites Visited in the Past Twelve Months

Survey respondents were also shown a list of websites that the campaign’s digital advertising ran on, and asked which ones they visited at least once in the past 12 months. The most commonly accessed websites was the New York Times website (nytimes.com) (21.9%) and Orbitz.com (20.2%). Southerliving.com (10.4%), NewYorker.com (9.8%), Travelzoo.com (9.4%) and Smithsonian.com (9.1%) each were used by about one tenth of the regional population.

Figure 5.3: Which of these websites do you recall visiting at least once in the past 12 months? (Select all that apply)

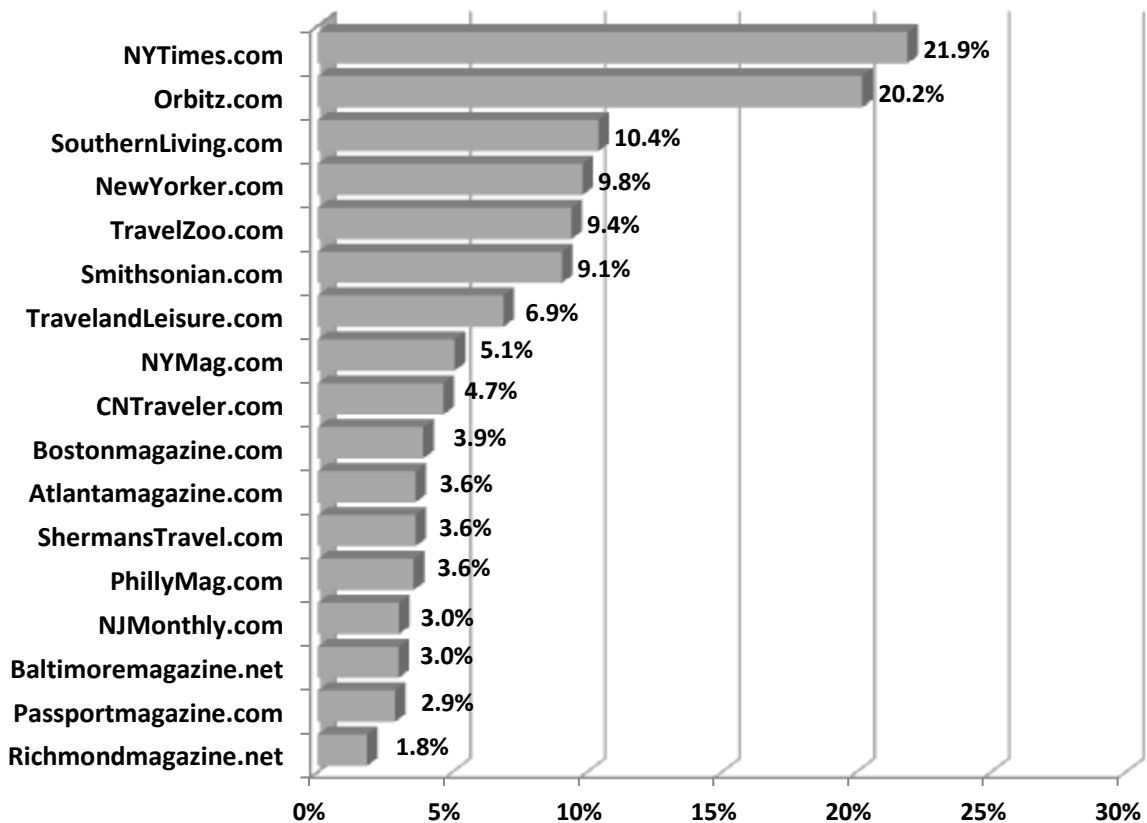


FIGURE 5.3 - Question: Which of these websites do you recall visiting at least once in the past 12 months? (Select all that apply) Base: All survey respondents (weighted data). 4,286 completed surveys.

Online Search Engines Used

As the campaign included paid search, survey respondents were then asked which search engines they had used in the past year. Survey findings continue to reflect Google's search market dominance, with over ninety percent of survey respondents saying they had used this search engine in the last year. Although second to Google, Yahoo!'s search engine was used by 48.4 percent of respondents. Microsoft's search tool, Bing, was used by 43.6 percent of respondents in the past year. In total, 97.8 percent reported using at least one of these search engines.

Figure 5.4: Which of these website search engines do you recall using at least once in the past 12 months?

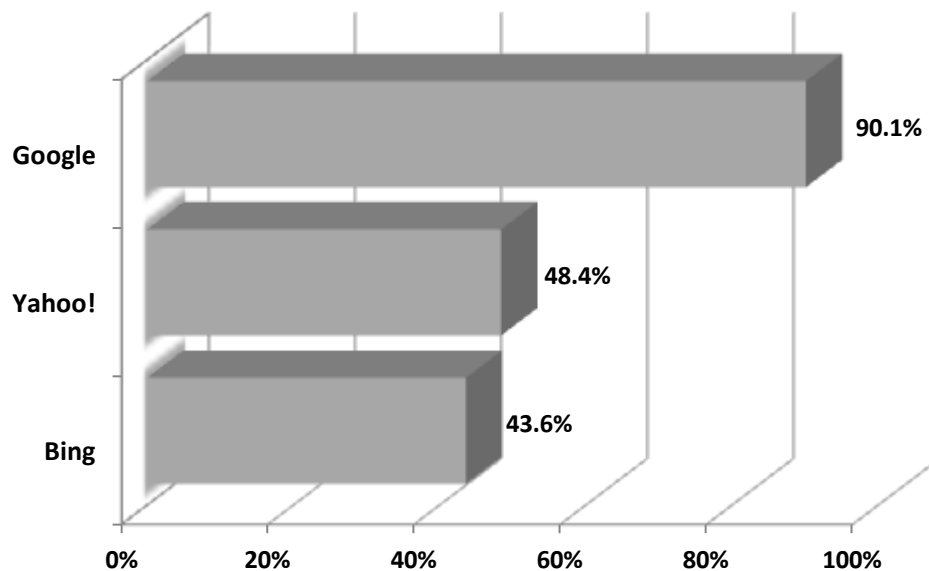


FIGURE 5.4 - Question: Which of these website search engines do you recall using at least once in the past 12 months?
Base: All survey respondents (weighted data). 4,286 completed surveys.

Radio Stations Listened to in Past Twelve Months

As the chart below shows, no radio station gathered a large listenership overall. Still, 12.9 percent of survey respondents reported having listened to any of the three radio stations tested.

Figure 5.5: Which of these radio stations do you recall listening to at least once in the past 12 months?

Station	% Respondents	Station	% Respondents
WAFX-FM - Classic Rock	1.6%	WKGM-AM - Religion	0.4%
WGH-FM - Country	1.0%	WOWI-FM - Urban Contemporary	0.4%
WROX-FM - Alternative/Modern Rock	0.9%	WPTE-FM - Modern Adult Contemporary	0.4%
WXTG-FM - Adult Alternative Rock	0.8%	Katz radio group	0.3%
WGPL-AM - Gospel	0.8%	WHBT-FM - Urban Contemporary	0.3%
WUSH-FM - Country	0.8%	WTAR-AM - Sports	0.3%
WNOB-FM - Adult Hits	0.8%	WNOR-FM - Album Oriented Rock	0.3%
WHRV-FM - National Public Radio	0.7%	WKQA-AM - Religion	0.3%
WPCE-AM - Gospel	0.6%	WVXX-AM - Spanish Contemporary	0.3%
WPMH-AM - Religion	0.5%	WWDE-FM - Adult Contemporary	0.2%
WNOH-FM - Contemporary Hit Radio	0.5%	WXGM-FM - Adult Contemporary	0.2%
WNIS-AM - News/Talk	0.5%	WNVZ-FM - Rhythmic CHR	0.2%
WVKL-FM - Urban Adult Contemporary	0.5%	WZLV-FM - Non-Commercial	0.1%
WJOI-AM - Easy Listening	0.5%	WJLZ-FM - Non-Commercial	0.1%
WVHT-FM - Contemporary Hit Radio	0.4%	WHRO-FM - Non-Commercial	0.1%
WVBW-FM - Adult Contemporary	0.4%	WNSB-FM - Non-Commercial College Radio	0.1%
WVSP-FM - Sports	0.4%	WGH-AM - Urban Inspirational	0.1%
WCPK-AM - Religion	0.4%	WMOV-FM - Rhythmic AC	0.1%

FIGURE 5.5 - Question: Which of these radio stations do you recall listening to at least once in the past 12 months? Base: All survey respondents. 4,286 completed surveys.

Use of United Airlines

Over a quarter of regional residents (28.5%) studied used United Airlines in the past year.

Figure 5.6: Have you flown on a United Airlines flight in the past 12 months?

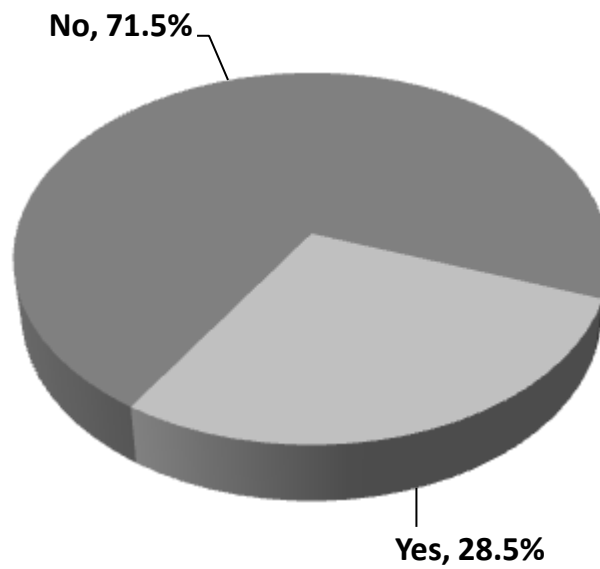


FIGURE 5.6 - Question: Have you flown on a United Airlines flight in the past 12 months? Base: All survey respondents. 4,286 completed surveys.

Leisure Trips Taken in the Past 12 Months

Respondents surveyed took an average of 2.3 leisure trips in the past year. While 29.9 percent took no leisure trips, and 18.9 percent took only one trip, a majority of adults living in the area of study travels multiple times for leisure each year (51.0%). This population area continues to represent an opportune environment to market Washington, DC as an option for one or more of these trips.

Figure 5.7: 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.

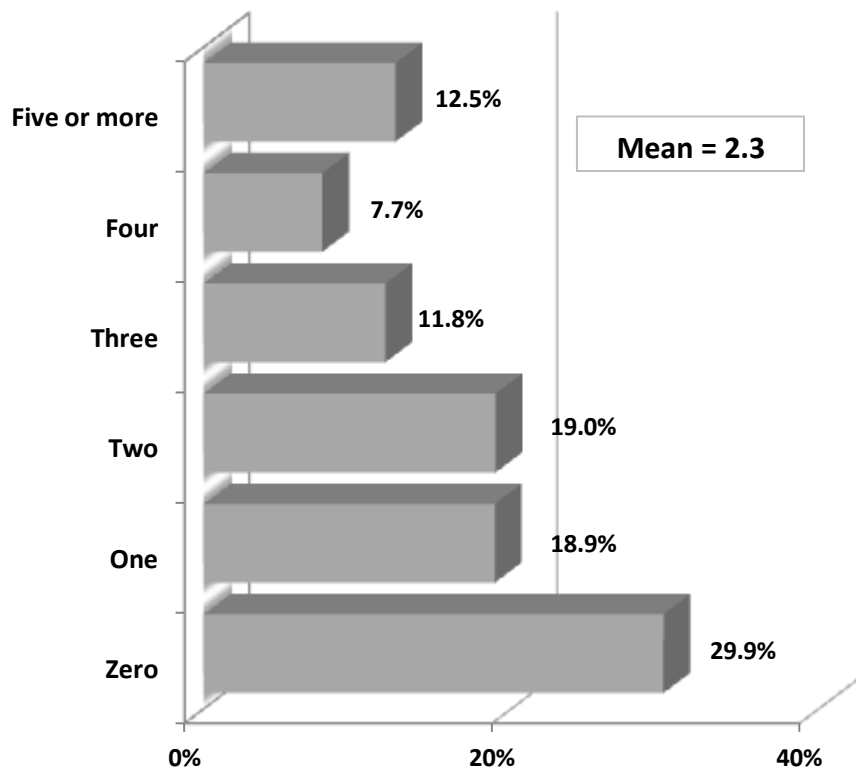


FIGURE 5.7 - Question: In the past 12 months, how many leisure trips (vacations, weekend getaways, and trips for other personal reasons) have you taken? Please enter a numeric value below. Base: All survey respondents (weighted data). 4,286 completed surveys.

Top of Mind Destination Awareness - Unaided

Washington DC continues to perform well in terms of unaided interest in visitation. When asked to state the four cities that first come to mind when thinking of a getaway destination with "great hotels, dining, shopping, entertainment, outdoor activities and other unique experiences" nearly one in ten respondents (9.0%) wrote in Washington DC. Last year, this figure stood at 10.5%.

Figure 5.8: Assume that you want to take a getaway trip to an urban destination within the U.S. that offers great hotels, dining, shopping, entertainment, outdoor activities and other unique experiences. What cities first come to mind?

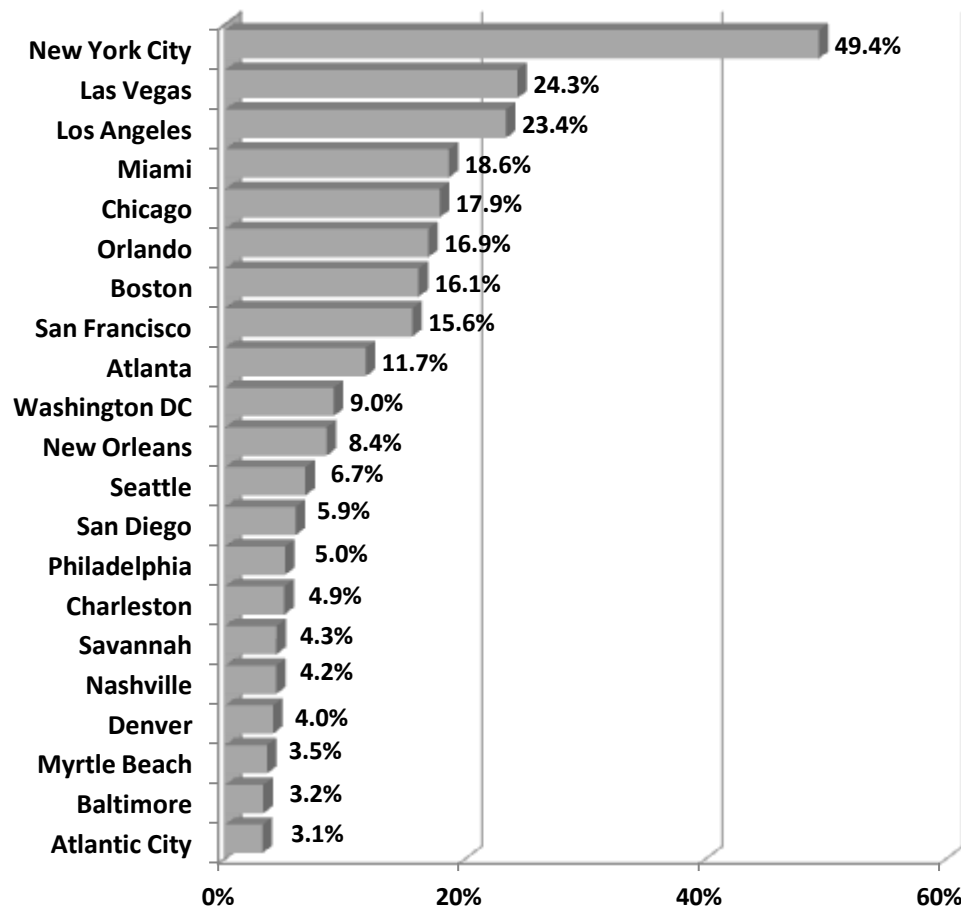


FIGURE 5.8 - Question: Assume that you want to take a getaway trip to an urban destination within the U.S. that offers great hotels, dining, shopping, entertainment, outdoor activities and other unique experiences. What cities first come to mind? Base: Respondents answering the question. 2,654 completed 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 cities and asked which they had visited in the last twelve months. As in previous years, New York City was the top regional destination, with 30.7 percent of regional residents having visited the city in the past year, followed by Atlanta, GA (17.9%) and Philadelphia, PA (16.6%). Washington, DC—the fifth most visited regional destination—continues to capture a significant share of regional visitor traffic as well, with 15.1 percent having traveled to the city in the previous 12 months. This is down slightly from the previous year, but it should be noted that all cities tested in this year's survey experienced this slight downward result.

Figure 5.9: In the past 12 months, which of these cities did you visit for leisure or personal reasons? (Select all that apply)

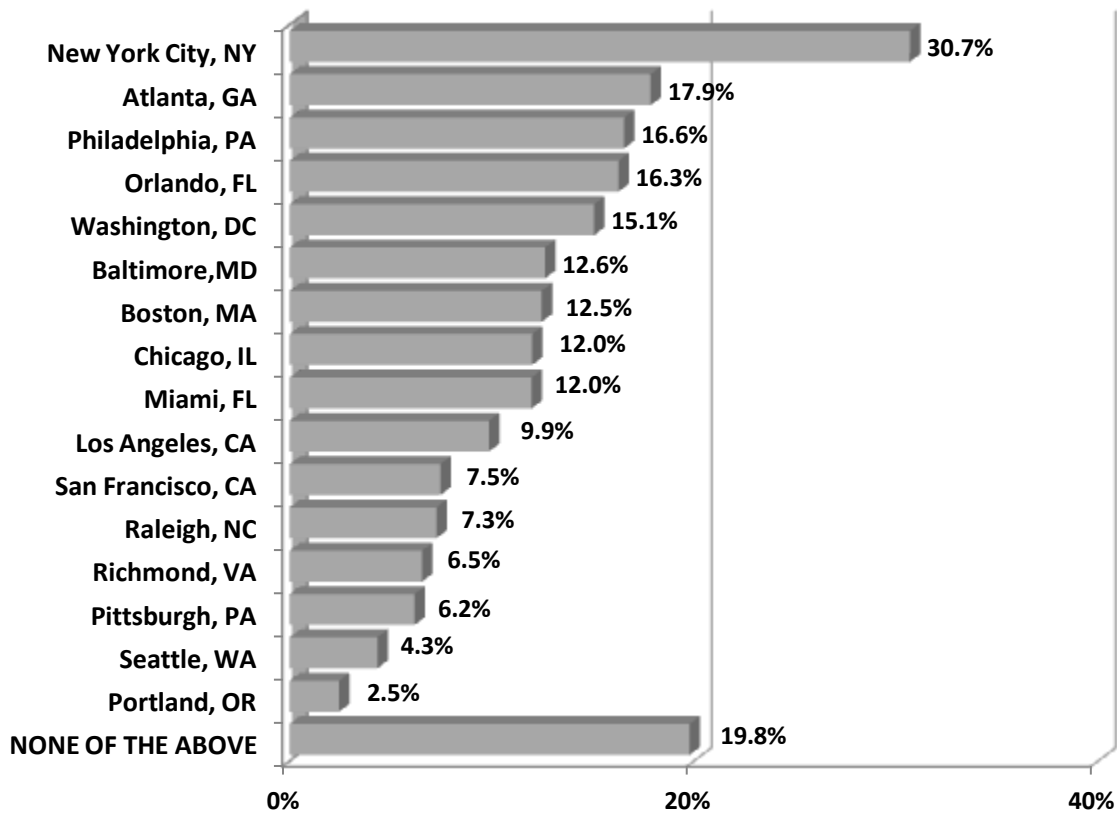


FIGURE 5.9 - Question: In the past 12 months, which of these cities did you visit for leisure or personal reasons? (Select all that apply) Base: Survey respondents who took at least one leisure trip in the past 12 months (weighted data). 4,286 completed surveys.

Visitation to Times Square—New York City

Survey respondents were asked if they had visited Times Square at any point in July, August, and/or September 2015 (the period a campaign advertisement ran there.) In total, 21.9 percent of survey respondents reported visiting Times Square within that three-month period.

Figure 5.10: At any point in July, August, or September 2015, did you visit or pass through Times Square in New York City?

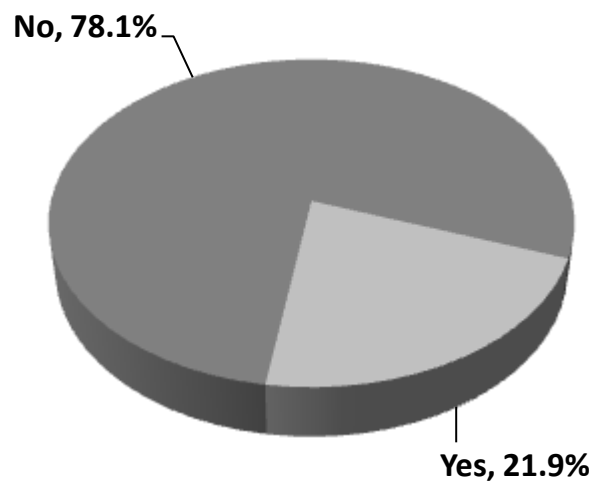


FIGURE 5.10 - Question: At any point in July, August, or September 2015, did you visit or pass through Times Square in New York City? Base: All survey respondents. 4,286 completed surveys.

Visitation to Penn Station—New York City

New York City's Penn Station was also a location where a campaign promotion was staged. Survey respondents were asked if they had visited Penn Station at any point in March. In total, 23.6 percent of survey respondents reported visiting Penn Station within that month-long promotional period.

Figure 5.11: At any point in March 2015, did you visit or pass through Penn Station in New York City?

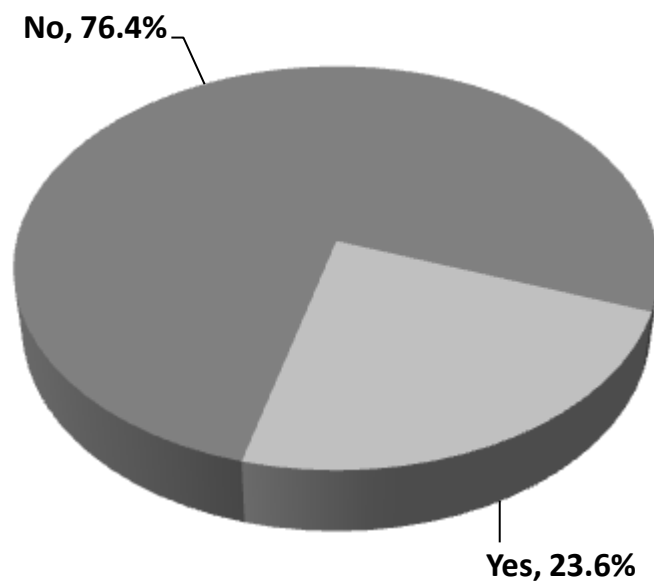


FIGURE 5.11 - Question: At any point in March 2015, did you visit or pass through Penn Station in New York City? Base: All survey respondents. 4,286 completed surveys.

Leisure Visits to the District of Columbia in the Past 12 Months

Those that reported visiting Washington, DC for leisure in the past year were asked how many such trips to the city they made. These District of Columbia visitors took an average of 2.9 trips to the city. While half of survey respondents said they took just one leisure trip to the District of Columbia (50.4%), the remainder took multiple trips to the city for leisure.

Figure 5.12: You said that you visited Washington, DC for leisure or personal reasons in the past 12 months. How many trips for leisure reasons did you make to Washington, DC in the past 12 months? (Please enter the number below.)

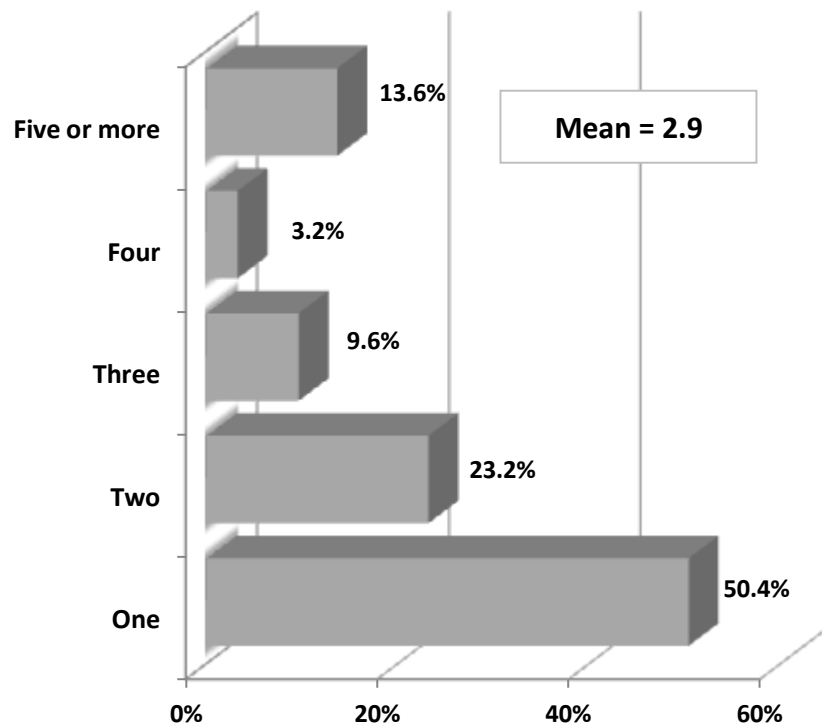


FIGURE 5.12 - Question: You said that you visited Washington, DC for leisure or personal reasons in the past 12 months. How many trips for leisure reasons did you make to Washington, DC in the past 12 months? (Please enter the number below.) Base: Survey respondents who visited the District of Columbia in the past 12 months (weighted data). 449 completed surveys.

Month of District of Columbia Visit

Respondents who took at least one leisure trip to the District of Columbia in the past year were asked in which month(s) they visited. The current survey findings are similar to those in previous years, in which regional visitor traffic to Washington, DC was at its lowest point in February (11.8%) and highest in the months of August and April (23.6% and 24.5%, respectively). Note: The survey was fielded in early-October and therefore October data should not be viewed as reflective of the entire month.

Figure 5.13: In which month(s) did you visit the city of Washington, DC on a leisure trip(s)? (Select all that apply.)

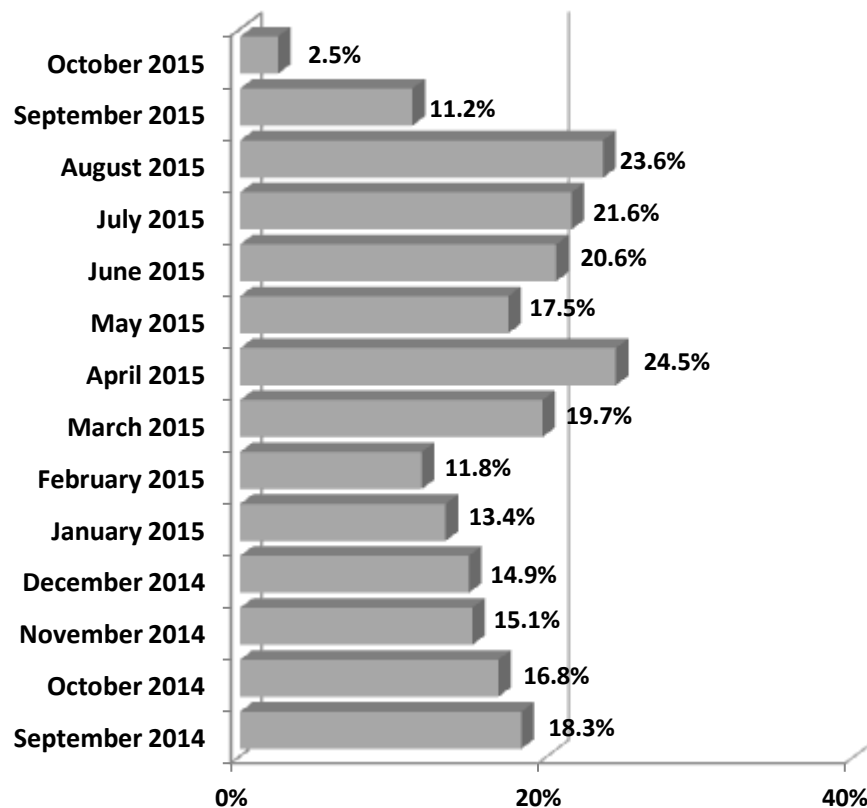


FIGURE 5.13 - Question: In which month(s) did you visit the city of Washington, DC on a leisure trip(s)? (Select all that apply.) Base: Respondents who visited the District of Columbia (weighted data). 449 completed surveys.

Primary Reason for Visiting the District of Columbia

Vacations and weekend getaways, as well as visiting friends and relatives (VFR) are significant tourism drivers to Washington, DC amongst regional travelers. Respondents visiting Washington, DC in the past year were asked the primary purpose of their most recent leisure trip to the city. The most common responses—in near identical proportion—were “visit friends or family” (27.1%), “weekend getaway” (26.4%) and “vacation” (26.3%). 15.8 percent reported visiting Washington, DC to “attend an event.”

Figure 5.14: Which best describes your reason for visiting the city of Washington, DC on this most recent leisure trip?

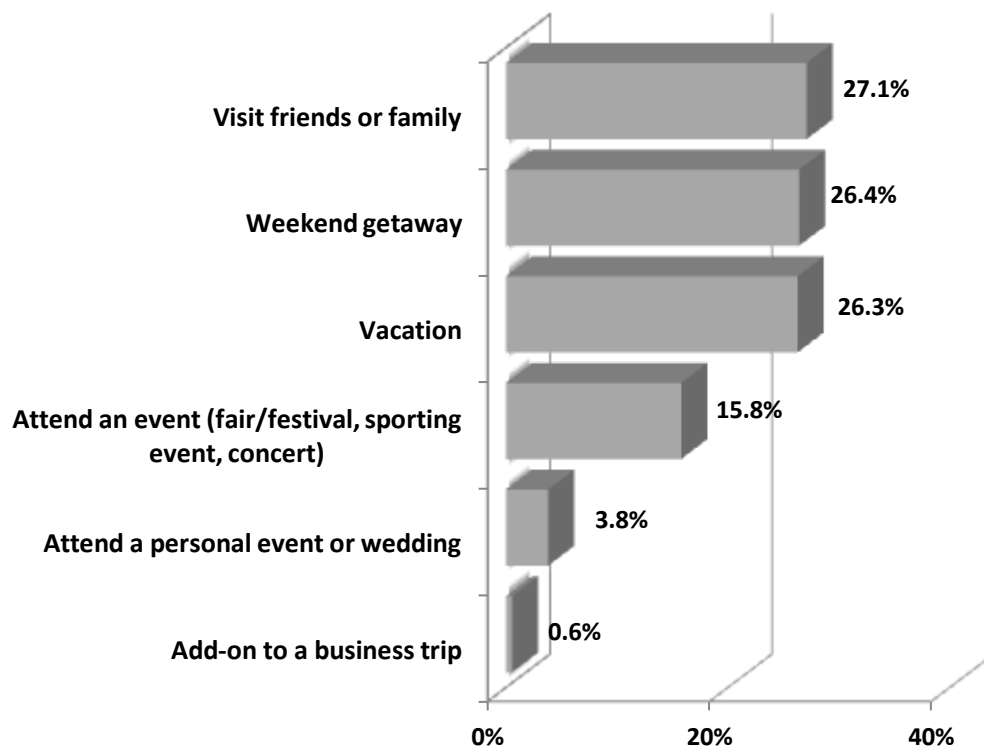


FIGURE 5.14 - Question: Which best describes your reason for visiting the city of Washington, DC on this most recent leisure trip? Base: Respondents who visited the District of Columbia (weighted data). 449 completed surveys.

Place of Stay—All District of Columbia Visitors

With a significant number of regional Washington, DC visitors coming to the city for a weekend getaway, vacation or special event/festival on their most recent trip, the greatest proportion of visitors stayed overnight and in paid accommodations (55.8%) on their trip. As 27.1 percent reported coming to Washington, DC specifically to visit friends and family, an identical percent stayed overnight at the residence of a friend or family member. One fifth (20.7%) of regional District of Columbia visitors were on a day-trip (or just passing through) and thus did not require lodging.

Figure 5.15: On this trip to the Washington, DC area, in what type of lodging did you stay? (Select all that apply)

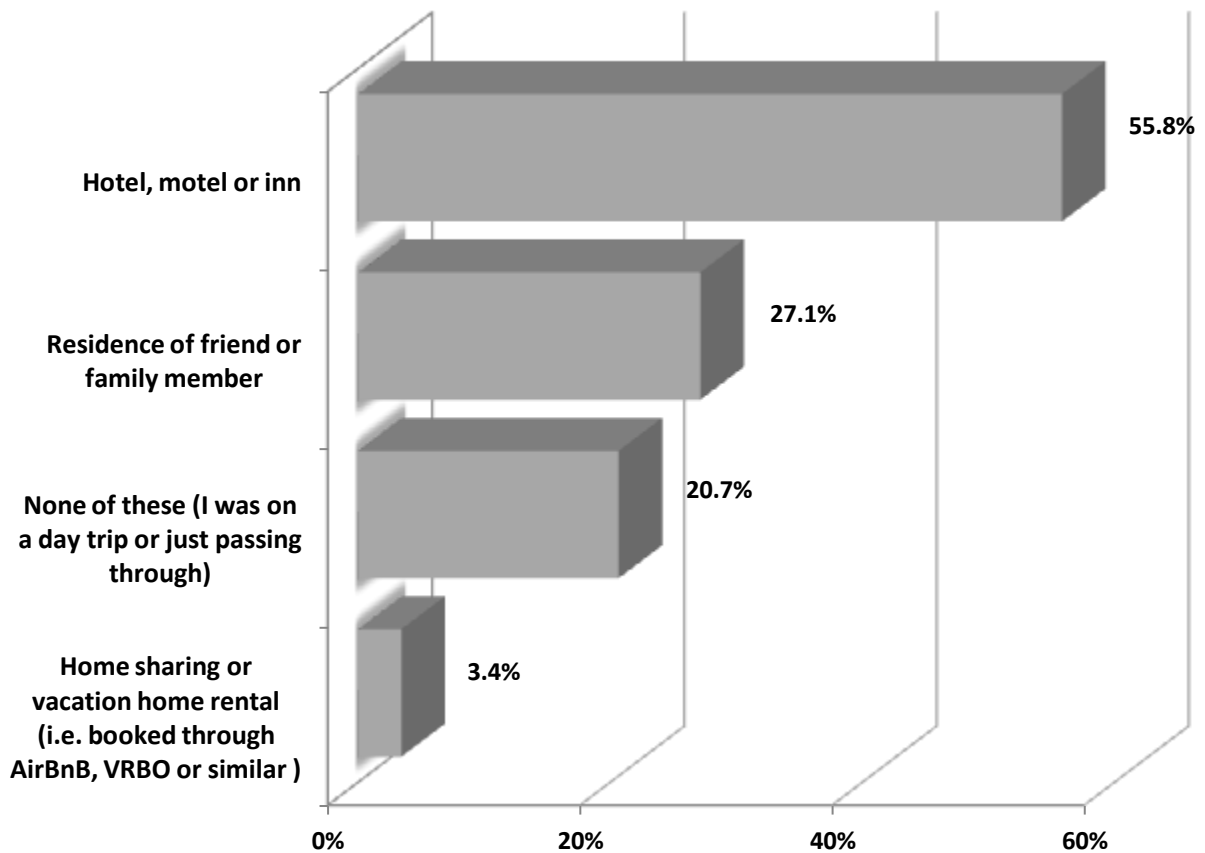


FIGURE 5.15 - Question: On this trip to the Washington, DC area, in what type of lodging did you stay? (Select all that apply) Base: Respondents who visited the District of Columbia (weighted data). 449 completed surveys.

Location of Place of Stay—District of Columbia Visitors Staying Overnight in the Washington DC Metro Area (Non Day-Trip)

Those who stayed overnight in the Washington, DC area during their most recent trip were asked the location(s) of where they stayed overnight. Over half of regional overnight visitors stayed in accommodations within the District of Columbia (59.6%). Of those that stayed outside the District, northern Virginia continued to be a more popular lodging destination than southern Maryland (33.2% vs. 17.6%).

Figure 5.16: On this trip to the Washington, DC area, where did you stay overnight? (Select all that apply)

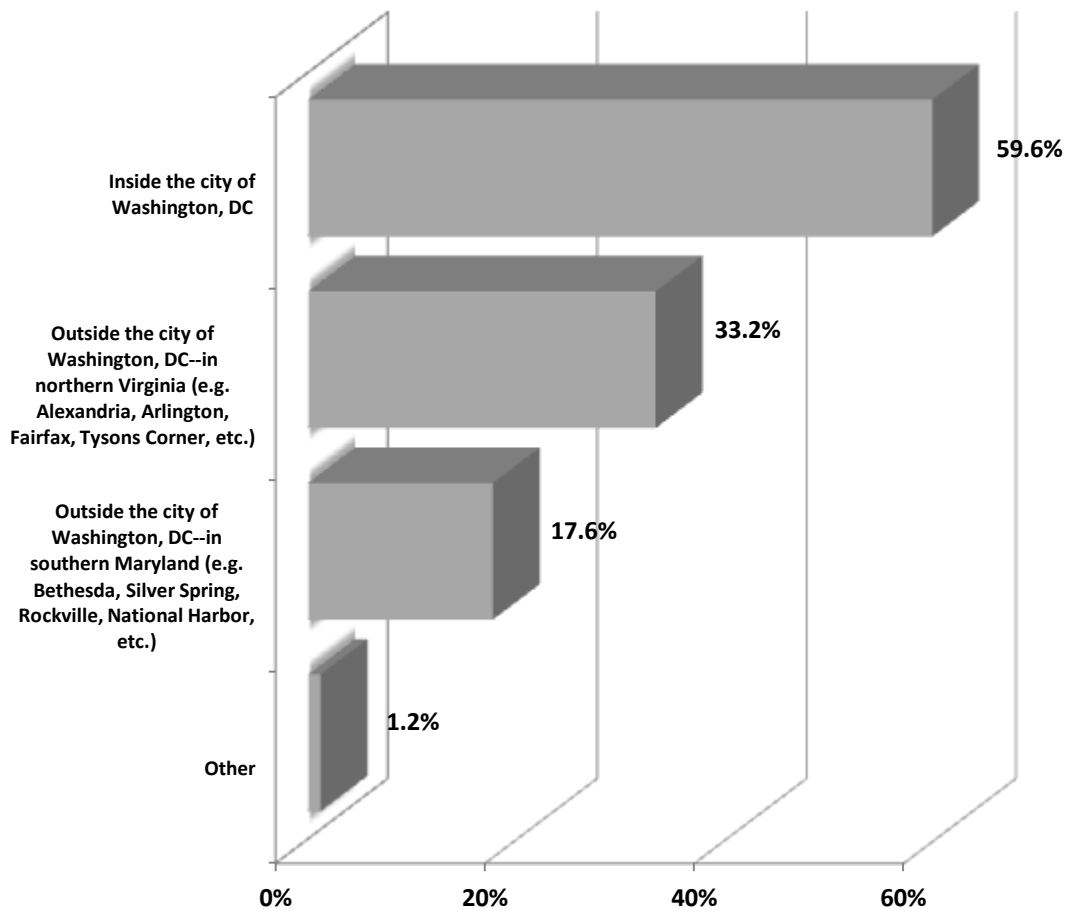


FIGURE 5.16 - Question: On this trip to the Washington, DC area, where did you stay overnight? (Select all that apply)
Base: Respondents who stayed overnight in the Washington, DC area (weighted data). 556 completed surveys.

Total Days Spent In Washington, DC Metro Area—All District of Columbia Visitors

The typical regional District of Columbia visitor surveyed spent an average of 3.6 days within the metropolitan area. As regional residents don't generally have to travel extensive distances to visit Washington, DC—and the reported purpose of many of these trips was for weekend getaways, to visit friends and family, or to attend an event—this may warrant shorter trips.

Figure 5.17: How many days total did you stay in the Washington, DC metropolitan area? Please enter a numeric value below.

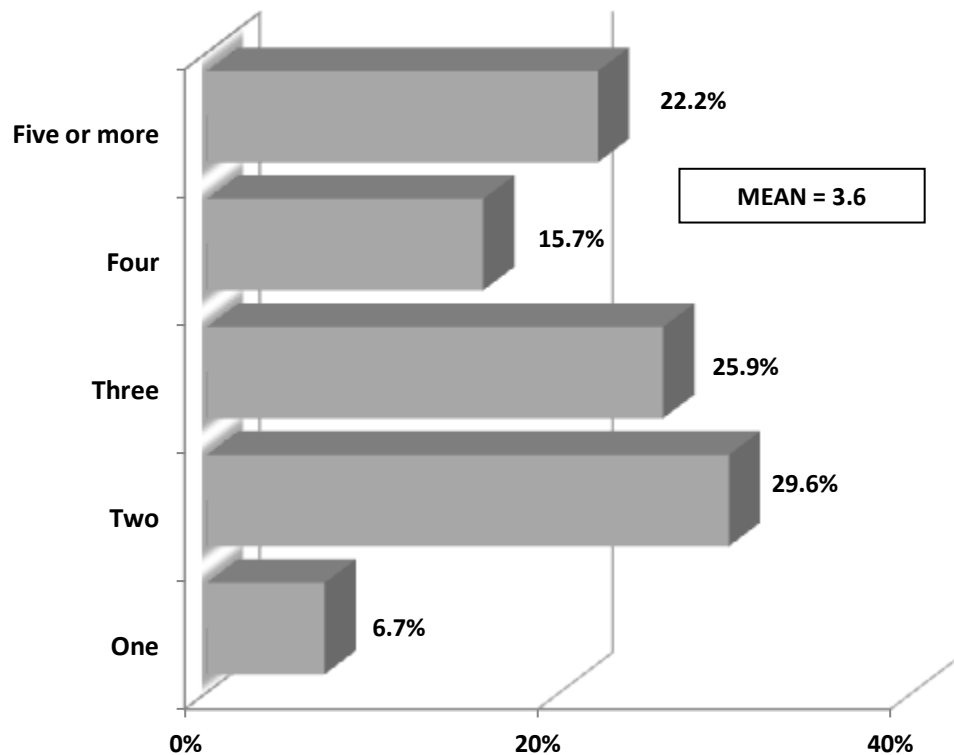


FIGURE 5.17 - Question: How many days total did you stay in the Washington, DC metropolitan area? Please enter a numeric value below. Base: Respondents who visited the District of Columbia (weighted data). 355 completed surveys.

Total Days Spent Inside the District of Columbia—All District of Columbia Visitors

The District of Columbia captures the significant portion of regional visitors' overall trips to the area. Of the 3.6 days typically spent in the metropolitan area, on average, 3.1 of those days were spent inside the District of Columbia.

Figure 5.18: How many of these days were spent inside the city of Washington, DC?

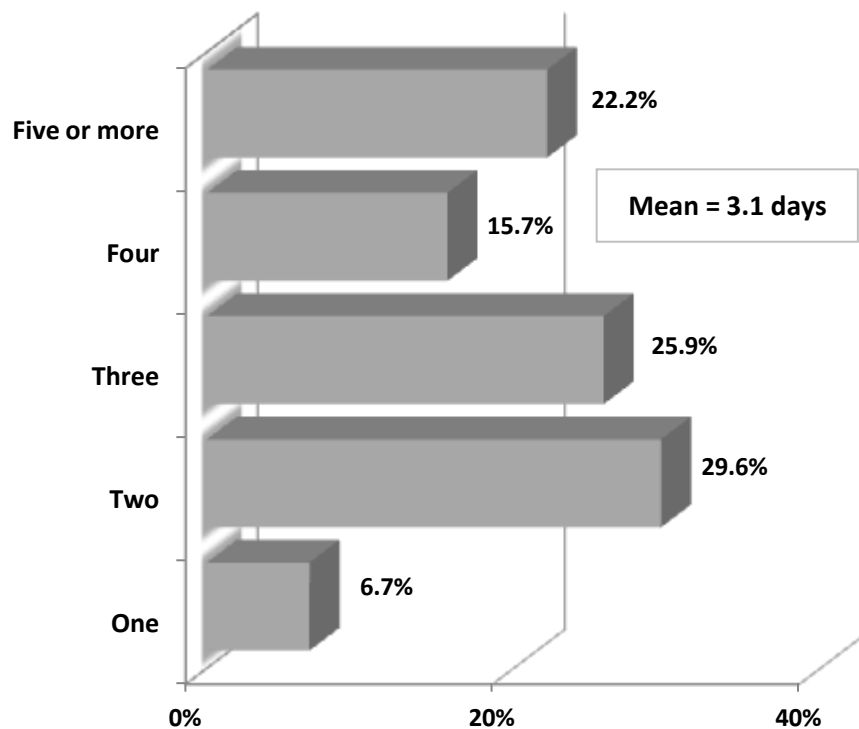


FIGURE 5.18 - Question: How many of these days were spent inside the city of Washington, DC? Base: Respondents who visited the District of Columbia (weighted data). 355 completed surveys.

District of Columbia Hotel Guest Visitor Spending in the District Per Day—Visitors who Stayed in Paid Accommodations within the District of Columbia

Washington, DC visitors who stayed overnight in paid accommodations (such as a hotel or motel) within the District of Columbia were asked to report their per-day spending across several categories. Visitors spent \$870.69 per day in the city on average. The largest proportions of this spending were on lodging (\$274.77) and restaurants & dining (\$195.25). This spending on average covered 2.3 persons, meaning on a per-person, per-day basis, the typical daily spend was \$380.88.

Figure 5.19: Approximately how much PER DAY did you spend on the following while in the city of Washington, DC? (Please do not include any spending outside the District of Columbia, e.g., any expenses incurred in Virginia or Maryland.)

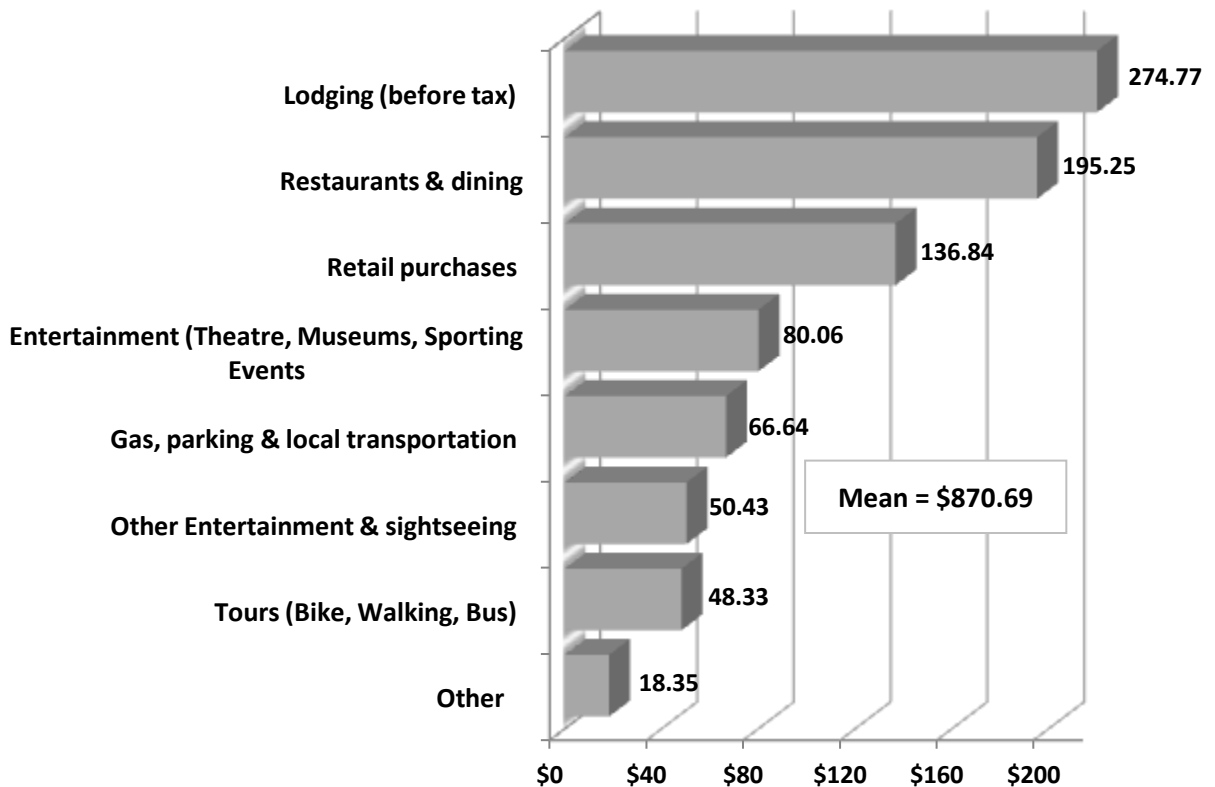


FIGURE 5.19 - Question: Approximately how much PER DAY did you spend on the following while in the city of Washington, DC? (Please do not include any spending outside the District of Columbia, e.g., any expenses incurred in Virginia or Maryland.) Base: Respondents who stayed overnight in the District of Columbia (weighted data). 171 completed surveys.

Non-District of Columbia Hotel Guest Visitor Spending in the District Per Day—Day-Trip Visitors, VFRs and Visitors who Stayed Overnight in Suburbs

Visitors who did not stay in paid accommodations in the District of Columbia were also asked to report their per day spending inside the District. These visitors spent less overall and on each individual spending category than their counterparts who stayed in District of Columbia hotels/motels. These visitors spent on average \$329.06 per day in the District of Columbia, largely on restaurants & dining (\$116.54), retail purchases (\$70.13), transportation-related expenditures (\$39.07) and entertainment (\$48.60). This spending on average also covered 2.3 persons, meaning on a per-person, per-day basis, the typical daily spend was \$143.95.

Figure 5.20: Approximately how much PER DAY did you spend on the following while in the city of Washington, DC? (Please do not include any spending outside the District of Columbia, e.g. any expenses incurred in Virginia or Maryland.)

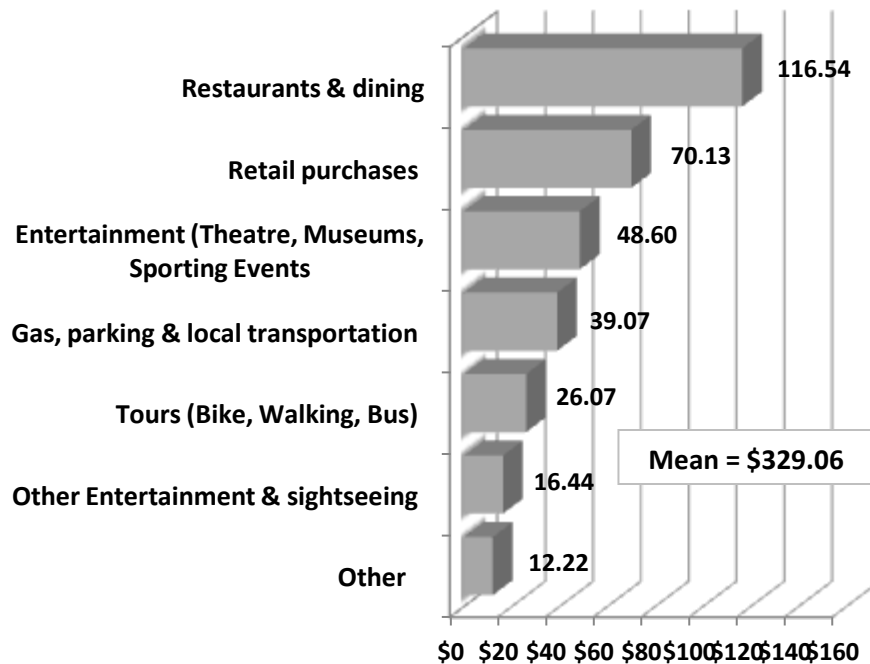


FIGURE 5.20 - Question: Approximately how much PER DAY did you spend on the following while in the city of Washington, DC? (Please do not include any spending outside the District of Columbia, e.g. any expenses incurred in Virginia or Maryland.) Base: Respondents who did not stay in paid accommodations in the District of Columbia (weighted data). 278 completed surveys.

Number of People Spending Covered—All District of Columbia Visitors

District of Columbia visitors were then asked how many people their per-day spending in the city covered. Reported visitor spending covered 2.3 persons on average, making the mean per-person, per day spending represented by regional District of Columbia hotels guests \$380.88, and \$143.95 for those who did not stay in paid accommodations within the District.

Figure 5.21: How many people did this spending cover (including yourself)?

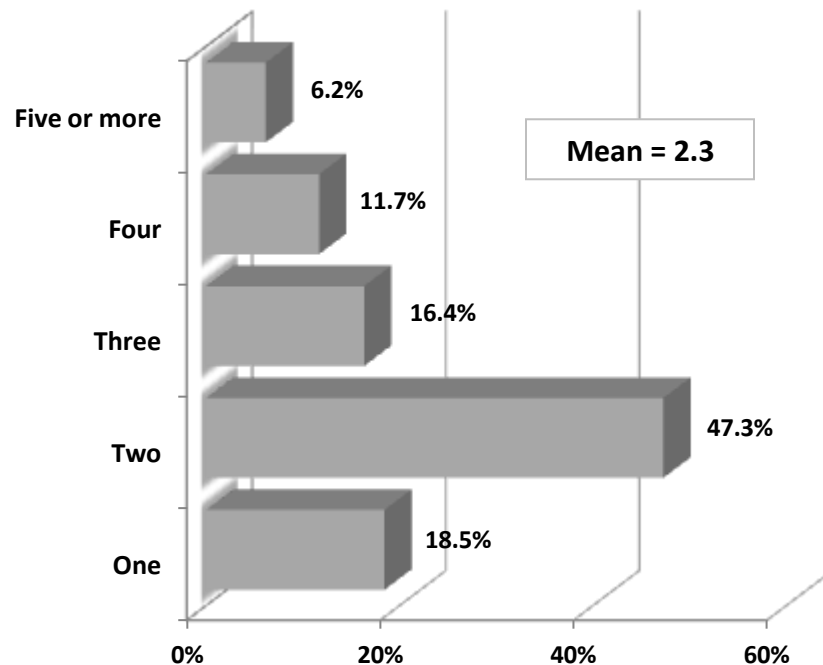


FIGURE 5.21 - Questions: How many people did this spending cover (including yourself)? Base: Respondents who visited the District of Columbia (weighted data). 449 completed surveys.

Number of People in Travel Party

The typical regional District of Columbia visitor had 2.5 people in his or her travel party. The greatest proportion of visitors was traveling with just one other person (44.6%). 42.0 percent were in groups of three or more while just 13.4 percent visited Washington, DC solo.

Figure 5.22: How many people were in your immediate travel party (including yourself)?

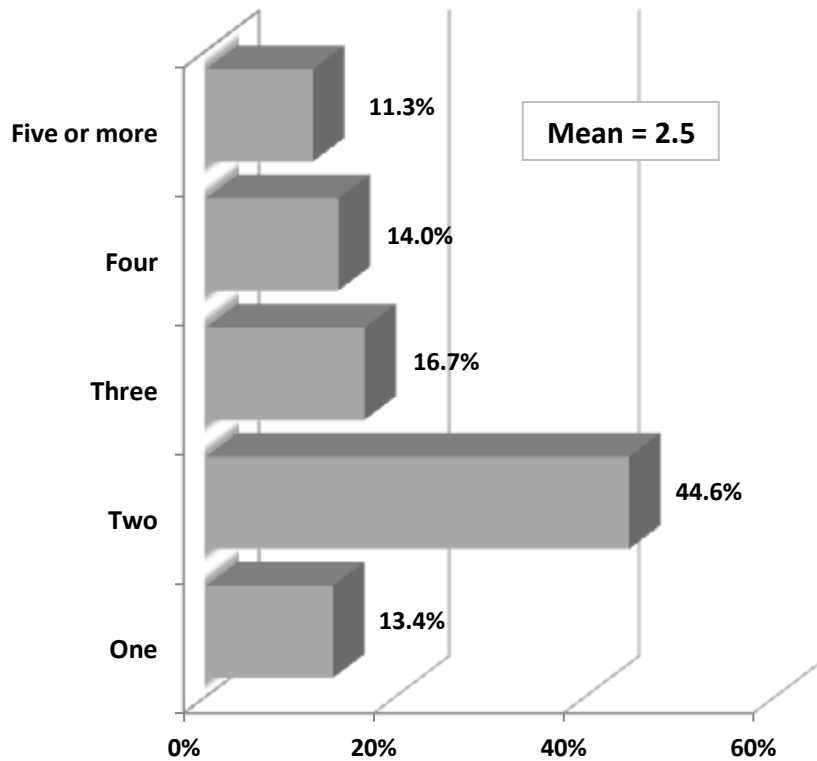


FIGURE 5.22 - Question: How many people were in your immediate travel party (including yourself?) Base: Respondents who visited the District of Columbia (weighted data). 447 completed surveys.

Children in Travel Party

The majority—63.3 percent—of regional District of Columbia visitors are traveling with just adults. While Washington, DC is primarily an adult destination, the city does, however, attract an important share of the region’s family travel market. 37.2 percent of visitors had at least one child in their party.

Figure 5.23: How many of the people in your immediate travel party were children? Please write in the number of children in each age category below.

Children in Travel Party (% All Travel Parties/Mean Children)			
	Zero	One or More	Mean Children
Children under age 6	82.0%	18.0%	0.23
Children age 6-10	88.1%	11.9%	0.14
Children age 11-13	88.9%	11.1%	0.15
Children age 14-17	86.3%	13.7%	0.18

FIGURE 5.23 - Question: How many of the people in your immediate travel party were children? Please write in the number of children in each age category below. Base: Respondents who visited the District of Columbia (weighted data). 449 completed surveys.

Important Attributes in Destination Decision

For regional travelers, interest in Washington DC's famed monuments and museums (and many of them free), and its historical significance continue to be the most important motivating factors in choosing the destination. Survey respondents were asked to select (from a list) the factors that were important to their decision to make their most recent visit to the city. The most commonly selected factors were "museums" (58.5%), "historical attributes" (46.6%), "monuments" (46.5%), and "free attractions" (43.1%).

Figure 5.24: Which of the following were IMPORTANT to your decision to make this visit to Washington, DC? (Select all that apply)

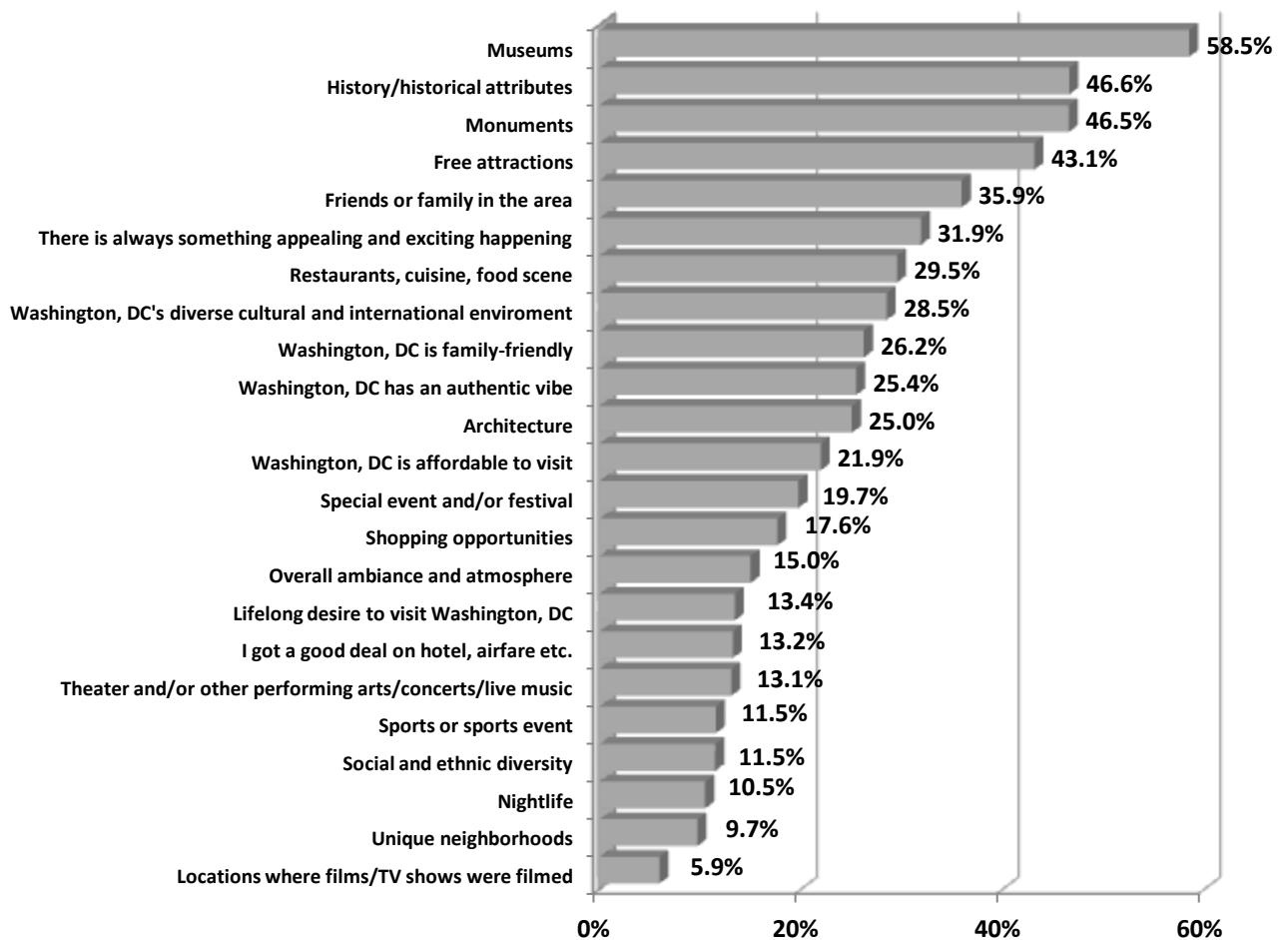


FIGURE 5.24 - Question: Which of the following were IMPORTANT to your decision to make this visit to Washington, DC? (Select all that apply) Base: All respondents (weighted data). 449 completed surveys.

Familiarity with Washington, DC

All survey respondents were asked how familiar they are with Washington, DC as a place to visit for leisure. 59.9% percent feels they are at least “somewhat familiar” with the District of Columbia as a leisure destination; of these, 19.3 percent describe themselves as “very familiar.” About one-in-five regional residents feel they are “not at all familiar” with D.C as a place to visit.

Figure 5.25: How familiar are you with Washington, DC as a place to visit for leisure? (Select one)

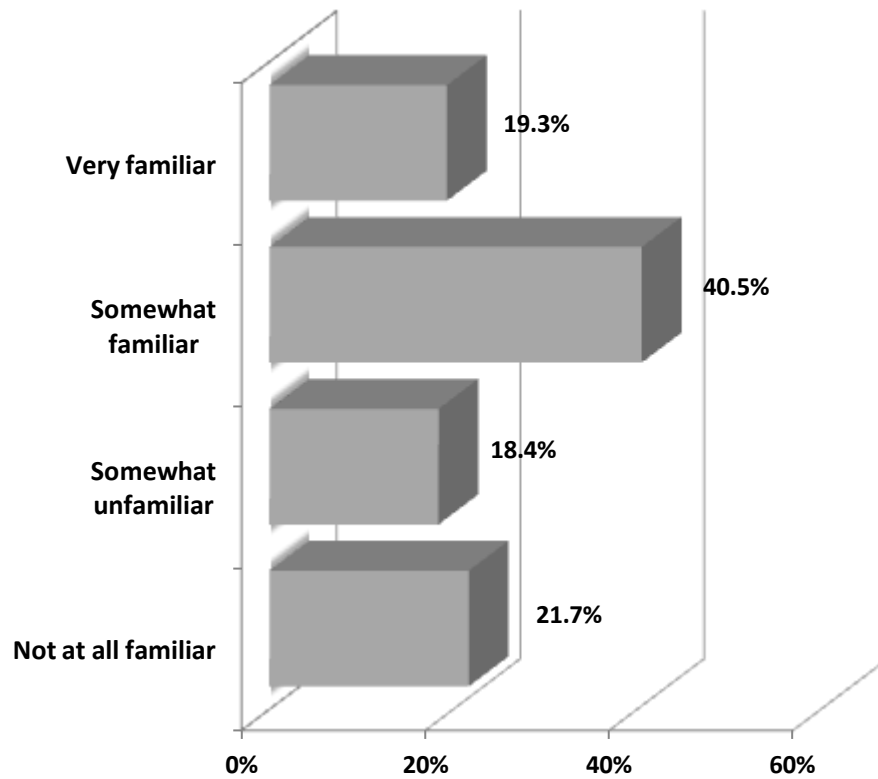


FIGURE 5.25 - Question: How familiar are you with Washington, DC as a place to visit for leisure? (Select one) Base: All respondents (weighted data). 4,286 completed surveys.

Likelihood to Visit Washington, DC in the Next 12 Months

Washington, DC has a high degree of potential to attract regional visitors for leisure in the coming year. Half of survey respondents (51.6%) say they have at least some likelihood to visit Washington, DC in the next twelve months, with one-in-ten saying they will “certainly visit.”

Figure 5.26: How likely are you to visit Washington, DC for leisure or personal reasons in the next 12 months? (Select one)

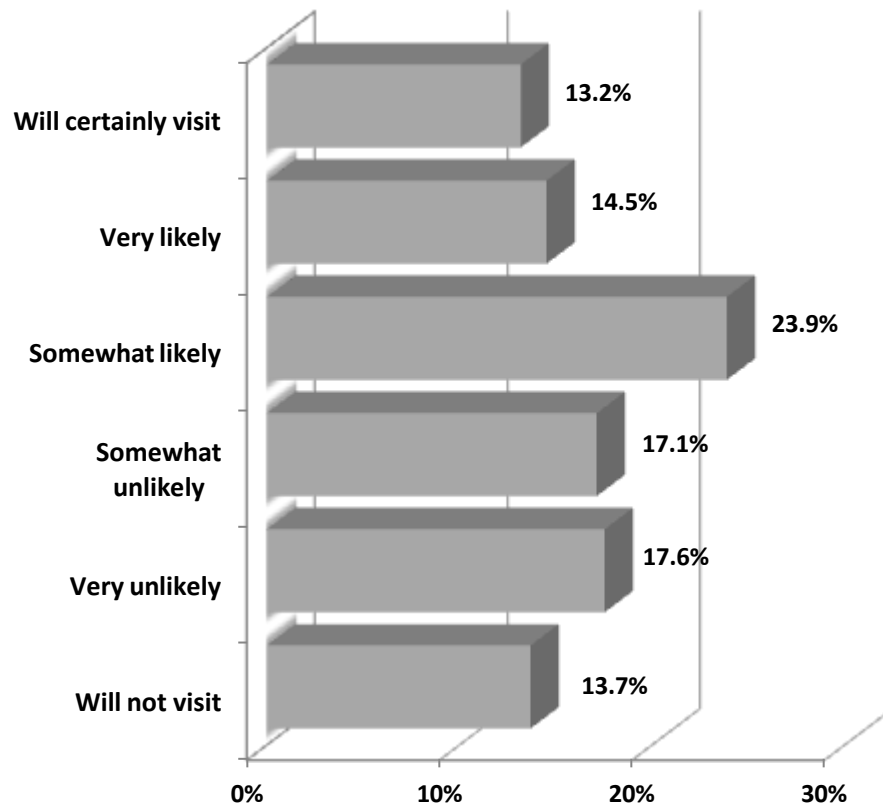


FIGURE 5.26 - Question: How likely are you to visit Washington, DC for leisure or personal reasons in the next 12 months? (Select one) Base: All respondents (weighted data). 4,286 completed surveys.

Likely Place of Stay in Washington DC

Survey respondents were asked to select the likely places they would stay if they visit Washington DC for leisure in the next 12 months. Hotel was clearly the dominant place of stay, with 71.6 percent of all respondents indicating they would stay in a hotel, motel or inn. Approximately 7 percent said they would stay in a peer-to-peer home sharing or vacation rental property.

Figure 5.27: If you were to visit Washington, DC for leisure or personal reasons in the next 12 months, in what type of lodging would you most likely stay? (Select all that apply)

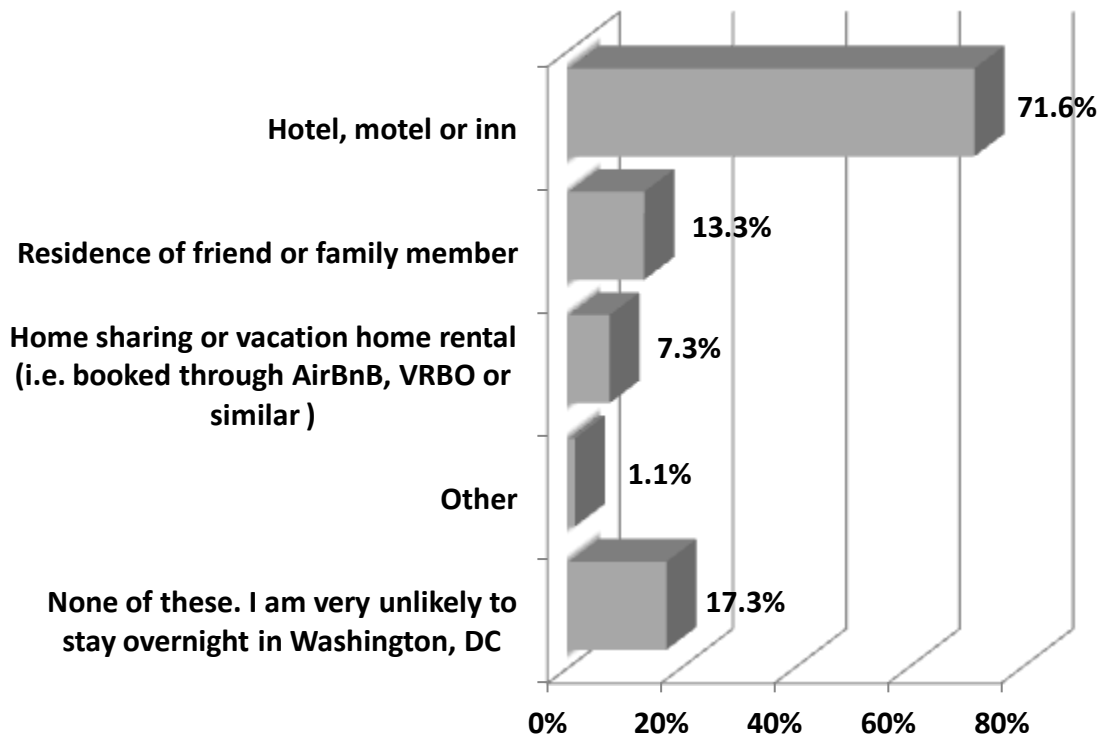


FIGURE 5.27 - Question: If you were to visit Washington, DC for leisure or personal reasons in the next 12 months, in what type of lodging would you most likely stay? (Select all that apply) Base: All respondents (weighted data). 4,286 completed surveys.

Recall of Washington, DC Advertisements (Unaided)

Unaided recall of Washington, DC advertising amongst regional residents fell slightly this year compared to past campaigns. 18.4 percent of survey respondents said with certainty that they recalled seeing an ad for leisure travel to Washington, DC in the past 12 months. Last year, this figure stood at 19.6%. 18.0 percent thought they “maybe” had. 63.6 percent felt they did not recall seeing any of these advertisements.

Figure 5.28: In the past 12 months, do you recall seeing and/or hearing any advertisements (in magazines, newspapers, online, on the radio or at an event) for leisure travel to Washington, DC?

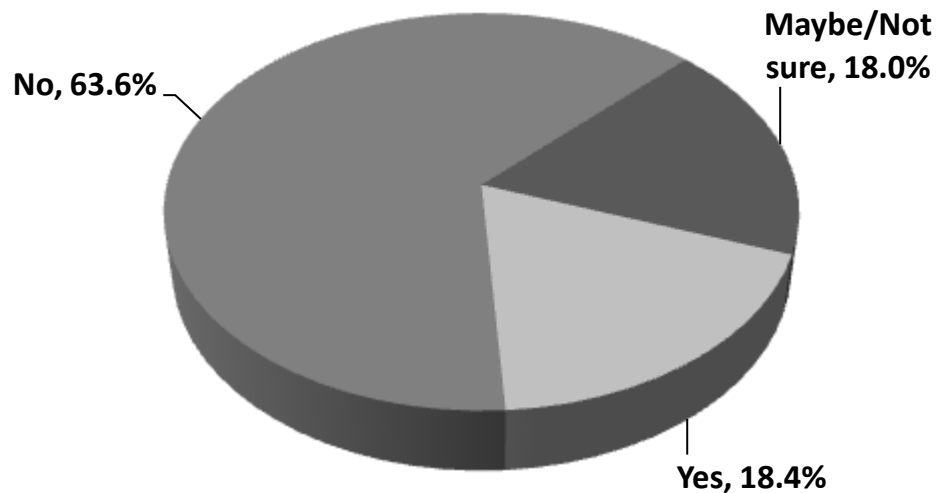


FIGURE 5.28 - Question: In the past 12 months, do you recall seeing and/or hearing any advertisements (in magazines, newspapers, online, on the radio or at an event) for leisure travel to Washington, DC? Base: All respondents (weighted data). 4,268 completed surveys.

Advertising Media Recall (Unaided)

Respondents who said they recalled seeing advertising for leisure travel to Washington, DC in the past year were asked to select the media in which they had seen this advertising. Survey respondents were likeliest to cite seeing Washington, DC travel advertising on television (48.5%), magazines (44.0%) and/or online on their desktop, laptop or tablet (43.3%—comparatively, 27.7% recalled seeing Washington, DC advertising on their mobile device). Given these results, regional residents were likely to have been exposed to Washington, DC tourism messages across multiple media.

Figure 5.29: Where did you see and/or hear this advertising? (Select each of the following media in which you recall having seen a Washington, DC travel advertisement in the past 12 months.)

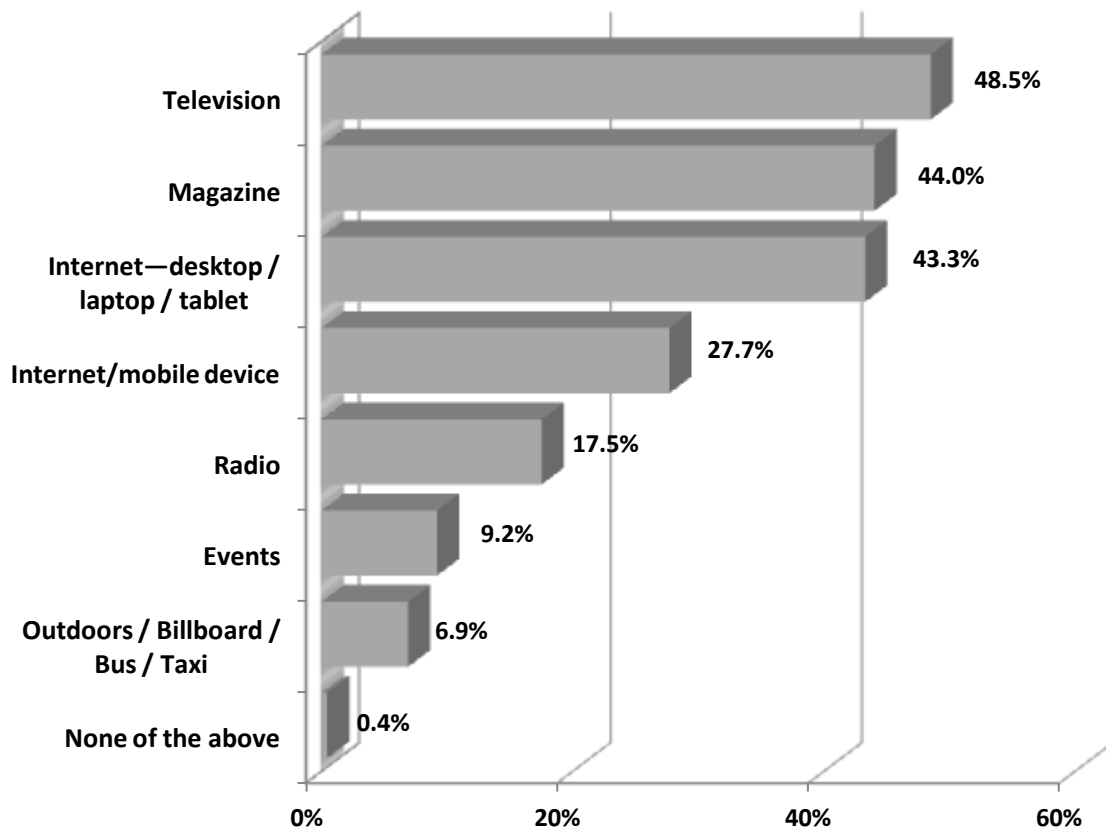


FIGURE 5.29 - Question: Where did you see and/or hear this advertising? (Select each of the following media in which you recall having seen a Washington, DC travel advertisement in the past 12 months.) Base: Respondents who saw leisure travel advertisements for Washington, DC (weighted data). 788 completed 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. 12.1 percent recalled seeing these magazine ads (down very slightly from 12.6% total print recall in 2014.)

Figure 5.30: During the past 12 months, do you recall having seen any of these advertisements in any magazines?

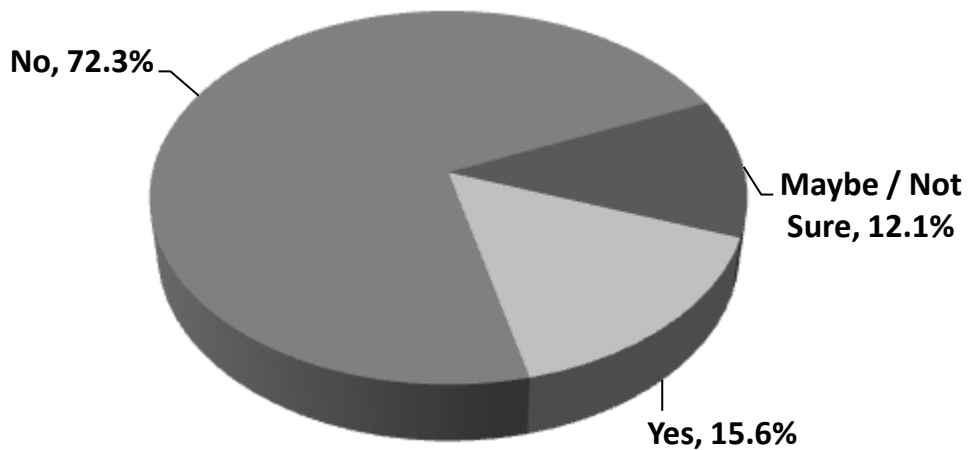


FIGURE 5.30 - Question: During the past 12 months, do you recall having seen any of these advertisements in any magazines? Base: All respondents (weighted data). 4,286 completed surveys.

Recall of Television Advertisements (Aided)

Penetration by the campaign's television advertisements reached more than one in ten regional residents. Fully 11.6 percent of survey respondents said they recall having seen one or more of the ads on television.

Figure 5.31: During the past 12 months, do you recall having seen any of these advertisements on television?

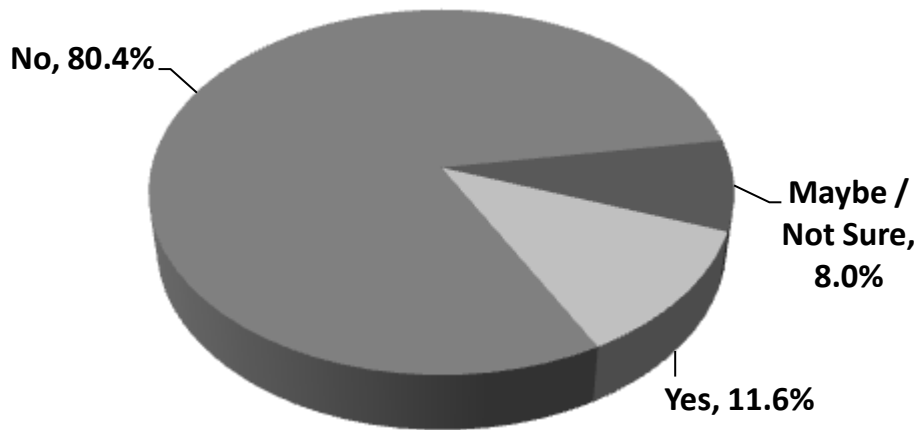


FIGURE 5.31 - Question: During the past 12 months, do you recall having seen any of these advertisements on television? Base: All respondents (weighted data). 4,286 completed surveys.

Recall of Digital Display Advertisements (Aided)

Respondents were then shown the digital advertisements used in the campaign and were asked if they had seen these ads anywhere online. 15.7 percent said they had in fact seen these ads online, up from 13.0 percent in 2014.

Figure 5.32: During the past 12 months, do you recall having seen these advertisements anywhere online, including on your smartphone or mobile device?

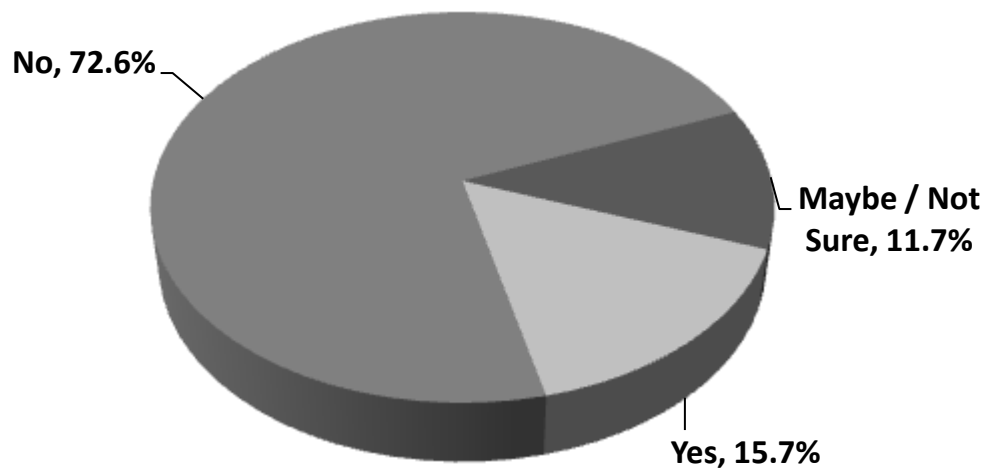
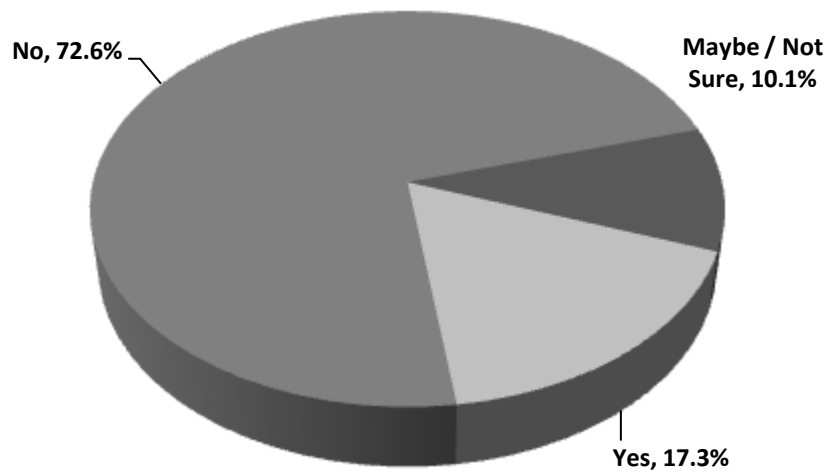


FIGURE 5.32 - Question: During the past 12 months, do you recall having seen this advertisement anywhere online, including on your smartphone or mobile device? Base: All respondents (weighted data). 4,478 completed surveys.

Recall of Video Advertisement (Aided)

Respondents were then shown the video advertisement and asked if they had seen this ad anywhere. Almost two in ten regional residents (17.3%) said they recalled seeing the video ad in the past year. Over half of those who recalled the ad said they saw the ad online (53.5%) and/or on television (51.1%). One in ten of this group recalled seeing it in Times Square.

Figure 5.33: During the past 12 months, do you recall having seen this advertisement anywhere?



Where the ad was seen

Online	53.5%
On TV	51.1%
In Times Square in New York City	10.1%
I don't remember	6.3%

FIGURE 5.33 - Question: During the past 12 months, do you recall having seen this advertisement anywhere? Base: All respondents (weighted data). 4,286 completed surveys.

Recall of Live Television Events (Aided)

Respondents were then shown images of the guerilla marketing on *The Today Show* and asked if they had recalled seeing this. Nearly fifteen percent of respondents said they had seen this effort (14.7%).

Figure 5.34: During the past 12 months, do you recall having seen this during NBC's *The Today Show*?

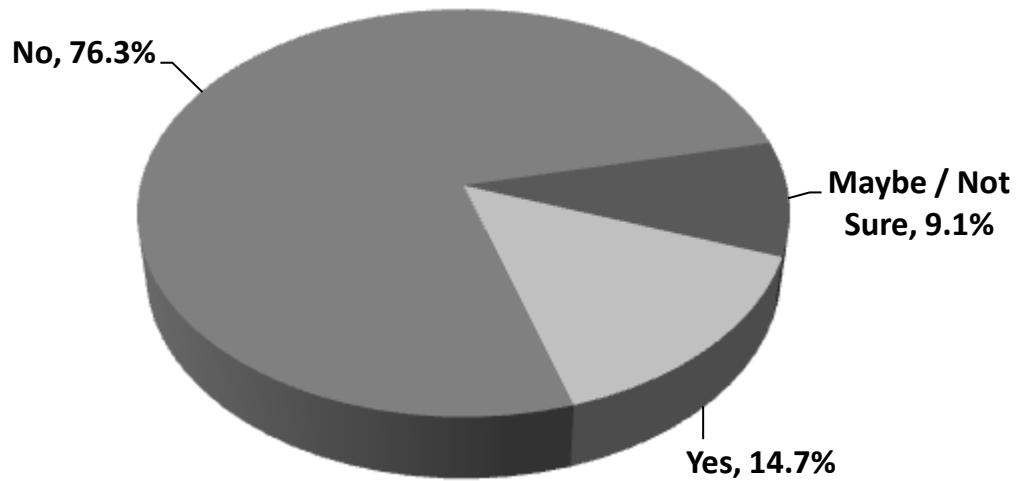


FIGURE 5.34 - Question: During the past 12 months, do you recall having seen this during NBC's *The Today Show*? Base: All respondents (weighted data). 4,286 completed surveys.

Recall of Penn Station Pop-Up Event (Aided)

8.0 percent of survey respondents recalled the pop-up event in Penn Station.

Figure 5.35: Do you recall seeing this event in Penn Station (New York)?

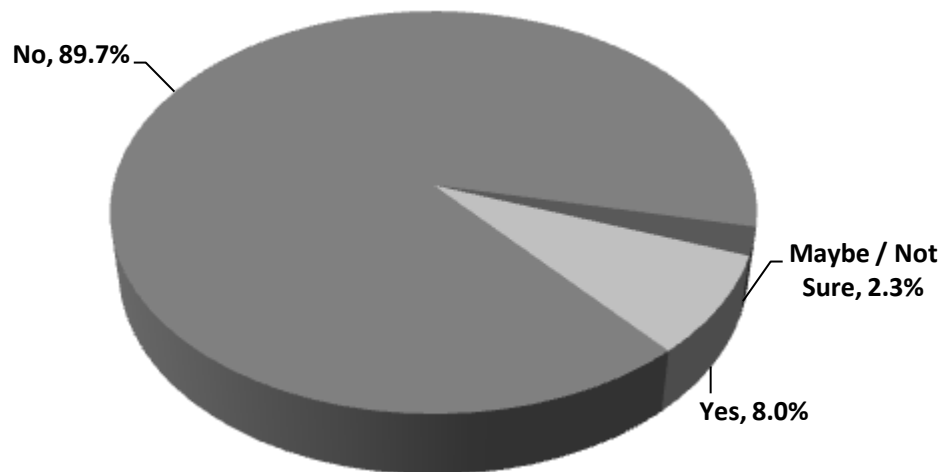


FIGURE 5.35 - Question: Do you recall seeing this event in Penn Station (New York)? Base: All respondents (weighted data). 4,286 completed surveys.

Recall of Outdoor Ad (BBQ Block Party, NYC—Aided)

Approximately two percent of respondents recall seeing Destination DC's advertising promoted as part of New York City's BBQ Block Party.

Figure 5.36: Do you recall seeing this as part of the NYC Barbeque Block Party?

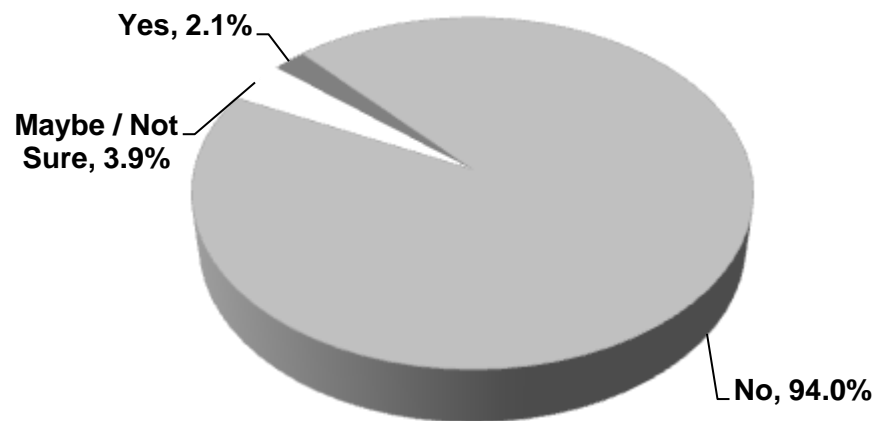


FIGURE 5.36 - Question: Do you recall seeing this as part of the NYC Barbeque Block Party? Base: All respondents (weighted data). 4,286 completed surveys.

Bus / Taxi Advertisements

14.1 percent of respondents recalled having seen the ads on buses and taxis in key markets.

Figure 5.37: Do you recall seeing these advertisements on any buses or taxis?

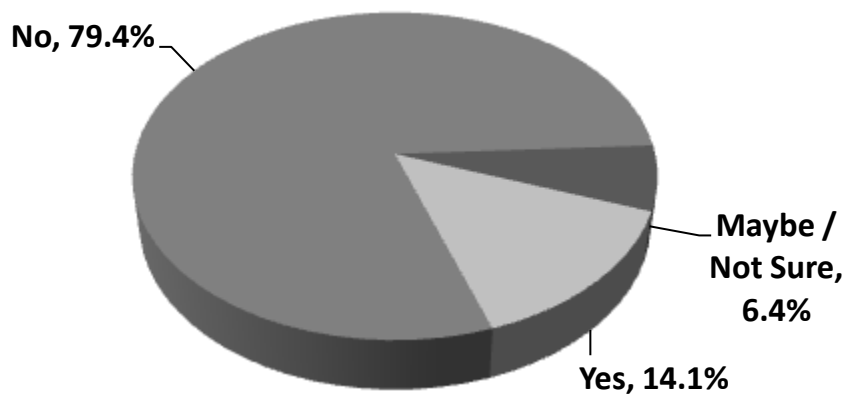


FIGURE 5.37 - Question: Do you recall seeing these advertisements on any buses or taxis? Base: All respondents (weighted data). 4,286 completed surveys.

Recall of Radio Advertisements

2.0 percent of all respondents said they had heard the campaign's radio ads.

Figure 5.38: During the past 12 months, do you recall having heard this advertisement on the radio?

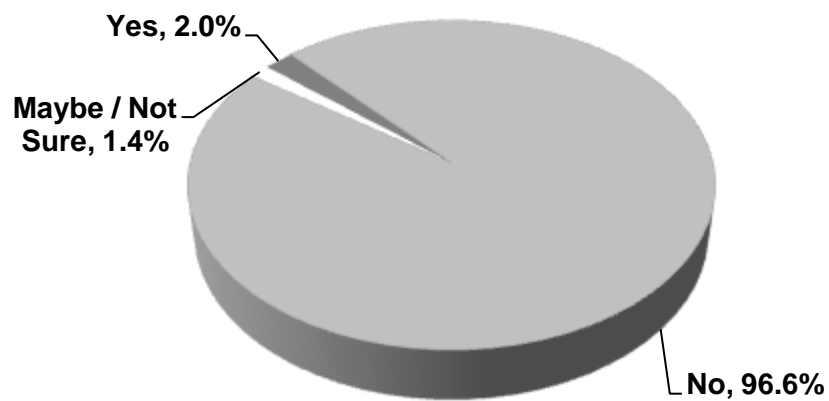


FIGURE 5.38 - Question: During the past 12 months, do you recall having heard this advertisement on the radio? Base: All respondents (weighted data). 4,286 completed surveys.

Recall of Baltimore Magazine Best of Baltimore Promotion

1.1 percent of all respondents recalled the advertising for Washington, DC that was part of Baltimore Magazine's Best of Baltimore event.

Figure 5.39: Do you recall seeing any advertising for Washington DC as part of the Baltimore Magazine Best of Baltimore event in August 2015?

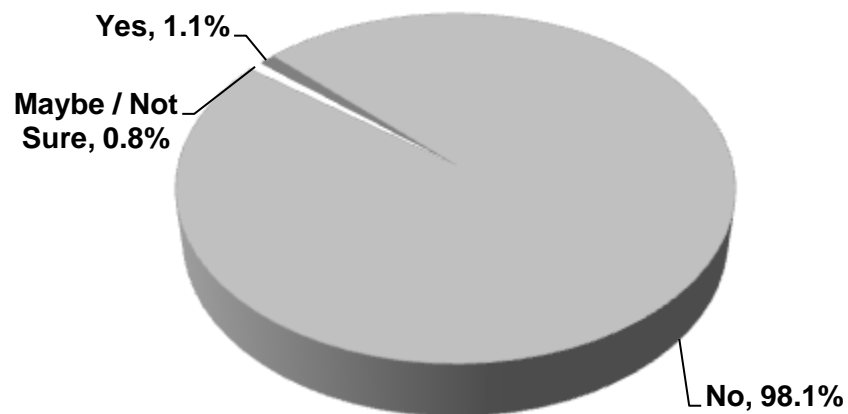


FIGURE 5.39 - Question: Do you recall seeing any advertising for Washington DC as part of the Baltimore Magazine Best of Baltimore event in August 2015? Base: All respondents (weighted data). 4,286 completed surveys.

Advertising's Overall Effectiveness

After viewing the major creative components of the campaign, respondents were asked how effective the ads are in portraying Washington, DC as a place they would enjoy visiting for leisure reasons. The advertising creative continues to grow its effectiveness at positioning Washington, DC as an attractive leisure destination. As was also seen in the 2014 campaign, two-thirds of survey respondents (67.6%) felt that the 2015 campaign creative is “effective” or “very effective” in portraying Washington, DC as a place they would enjoy visiting for leisure. Only 7.7 percent felt that this year’s advertising was “ineffective” or “very ineffective” towards this objective.

Figure 5.40: After viewing this series of advertisements, overall, how effective do you think these advertisements are in portraying Washington, DC as a place you would enjoy visiting for leisure reasons? (Select one)

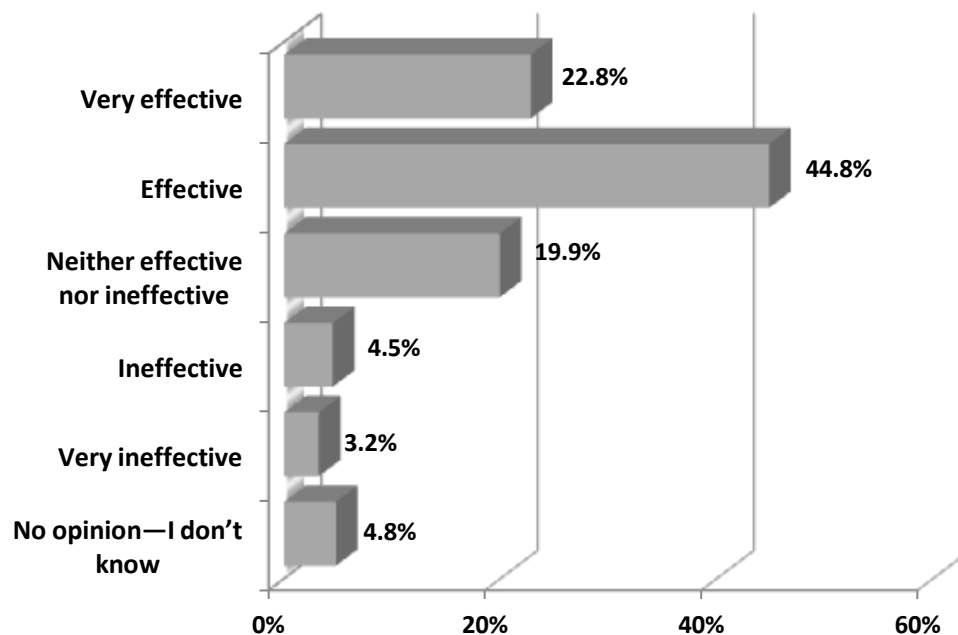


FIGURE 5.40 - Question: After viewing this series of advertisements, overall, how effective do you think these advertisements are in portraying Washington, DC as a place you would enjoy visiting for leisure reasons? (Select one)
Base: All respondents (weighted data). 4,286 completed surveys.

Advertising's Effectiveness in Communicating Campaign's Central Messages

Destination DC's consumer advertising campaign had several messaging goals that it was tasked with accomplishing. Survey respondents were asked to use a scale to rate how effective the advertising was overall in portraying Washington, DC in the ways that the campaign intended. Figure 5.37 below shows the percent of respondents who said that the advertising portrayed each messaging aspect "effectively" or "very effectively." There was the most agreement that the campaign advertising effectively portrayed Washington, DC as "a place with lots to see and do in addition to monuments and museums" (74.2%) Many other messages—such as being a good place for a family vacation—performed strongly, as well.

Figure 5.41: Overall, how effective do you think these advertisements are in portraying the following aspects of Washington, DC? (Please use the five point scale below where 1 represents "Very ineffectively" and 5 represents "Very effectively") The advertisements portray this aspect of Washington, DC...

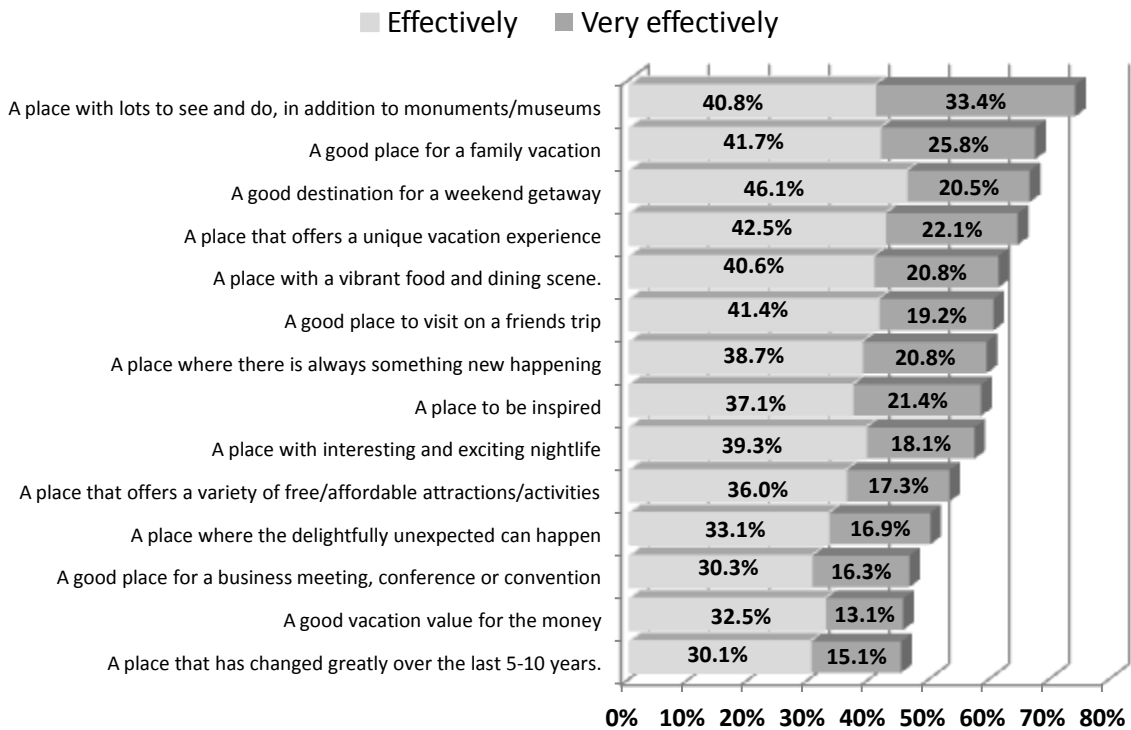


FIGURE 5.41 - Question: Overall, how effective do you think these advertisements are in portraying the following aspects of Washington, DC? (Please use the five point scale below where 1 represents "Very ineffectively" and 5 represents "Very effectively") The advertisements portray this aspect of Washington, DC... Base: All respondents (weighted data). 4,286 completed surveys.

Advertisements' Effect on Likelihood to Visit Washington, DC

Survey respondents were asked how the ads they viewed would affect their likelihood to visit Washington, DC in the next year. Over a third of respondents (38.0%) felt that the ads made them *more likely* to visit Washington, DC (nearly equal to last year's 37.7%, but up from 33.3% in 2013 and 23.1% in 2010). Only 3.9 percent said the ads had a negative effect on their likelihood to visit, while 6.6 percent were unsure. The remaining half said they were "Unchanged. I am not more or less likely to visit Washington, DC for leisure in the next 12 months."

Figure 5.42: How did the advertisements you viewed today affect your likelihood to visit Washington, DC for leisure in the next 12 months? (Select one)

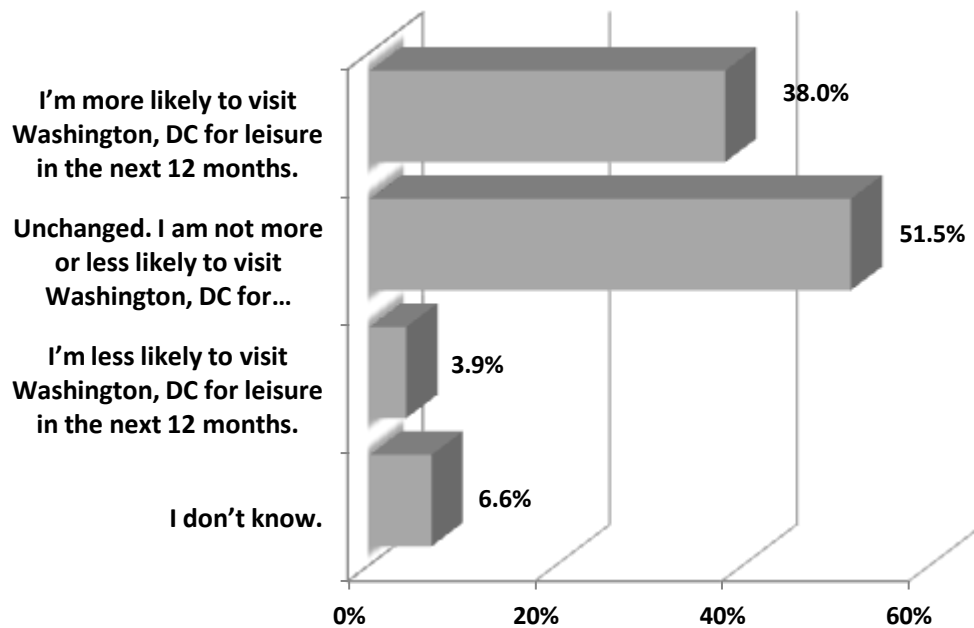


FIGURE 5.42 - Question: How did the advertisements you viewed today affect your likelihood to visit Washington, DC for leisure in the next 12 months? (Select one) Base: All respondents (weighted data). 4,286 completed surveys.

Advertising's Influence on Decision to Visit Washington, DC

Those survey respondents who reported having made at least one trip to the District of Columbia 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 Washington, DC. 68.8 percent of these persons reported that the advertising did indeed influence their decision to visit the District of Columbia. This figure increased from 49.9 percent in 2014.

Figure 5.43 – You said that you recall seeing one or more of the Washington, DC tourism ads that you reviewed earlier in the survey. Did this ad (or ads) you saw in any way influence your decision to visit Washington, DC?

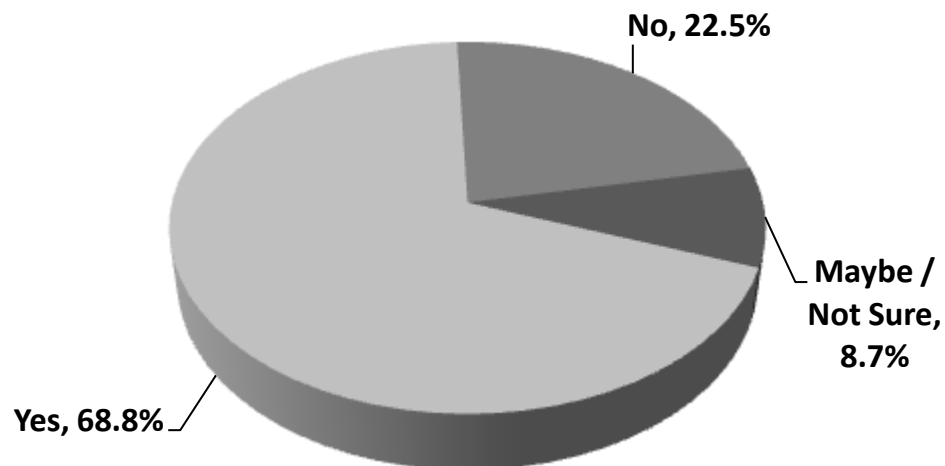


TABLE 5.43 – Question: You said that you recall seeing one or more of the Washington, DC tourism ads that you reviewed earlier in the survey. Did this ad (or ads) you saw in any way influence your decision to visit Washington, DC? Base: Respondents who visited the District of Columbia and recall seeing one or more DC Cool advertisements (weighted data). 217 completed surveys.

Importance of Advertising to Destination Decision

Those survey respondents who reported having made at least one trip to the District of Columbia in the past year and who recalled seeing at least one of the ads were asked how important the advertising was to their decision to visit Washington, DC. Illustrating the impact of the campaign on those exposed to it, nearly all respondents report that the advertisements were either “Important” or “Very important” to their ultimate decision to visit Washington, DC (93.4 %).

Figure 5.44 - How important was this advertising to your decision to visit Washington, DC?

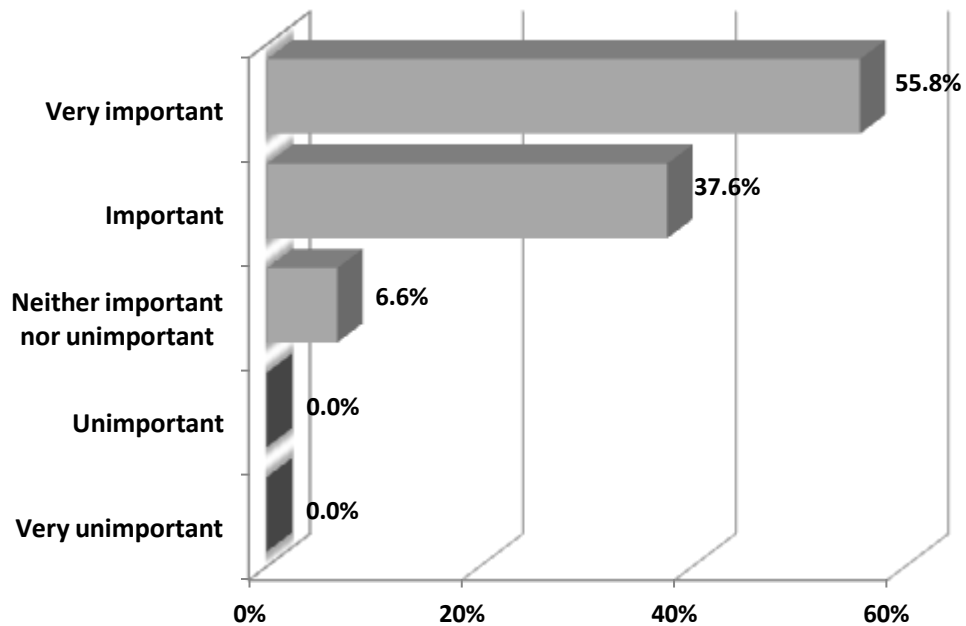


FIGURE 5.44 - Question: How important was this advertising to your decision to visit Washington, DC? Base: Respondents who visited the District of Columbia and recall seeing one or more DC Cool advertisements (weighted data). 149 completed surveys.

Point in Travel Decision When Exposed to Advertising

Those survey respondents who reported having made at least one trip to the District of Columbia in the past year and who recalled seeing at least one of the ads were asked at what point in their destination decision process they were in when they saw this advertising. The campaign was effective at reaching people in the top of the travel planning funnel. 47.1 percent report having been at a point of potential influence, meaning they had not already made up their mind to visit Washington, DC when they say the advertising.

Figure 5.45 - When you saw the advertisement(s) for Washington, DC, 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.

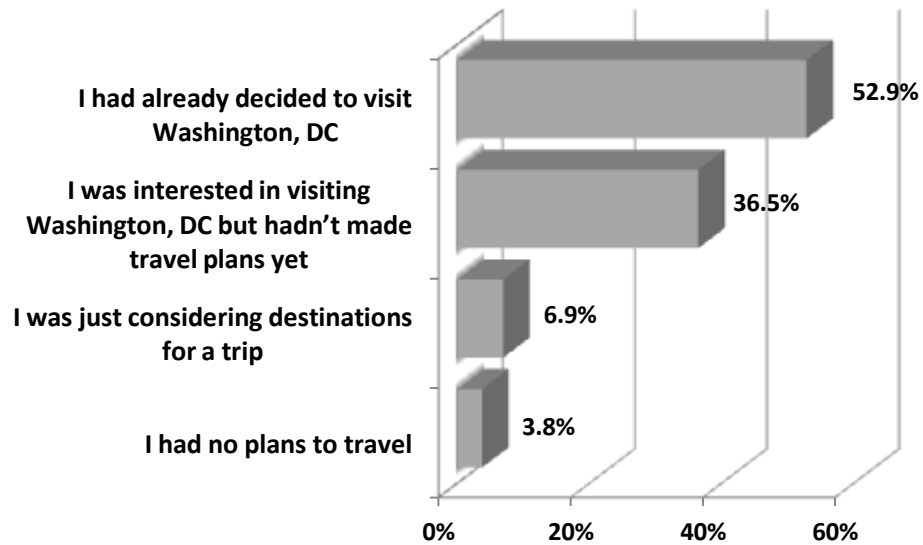


FIGURE 5.45 - Question: When you saw the advertisement(s) for Washington, DC, where were you in the process of deciding to travel? Please select the one option that best describes where you were in your travel decision. Base: Respondents who visited the District of Columbia and recall seeing one or more DC Cool advertisements (weighted data). 217 completed surveys.

Recall of Travel Articles about Washington, DC

The campaign included public relations outreach efforts to generate earned media for Washington, DC. 18.4 percent of survey respondents reported having seen such articles—either digitally or in print—about leisure travel to Washington, DC in the past year, up from 17.3 percent in 2014.

Figure 5.46 – In the past 12 months, do you recall seeing any travel articles – either digitally or in print featuring leisure travel to Washington, DC?

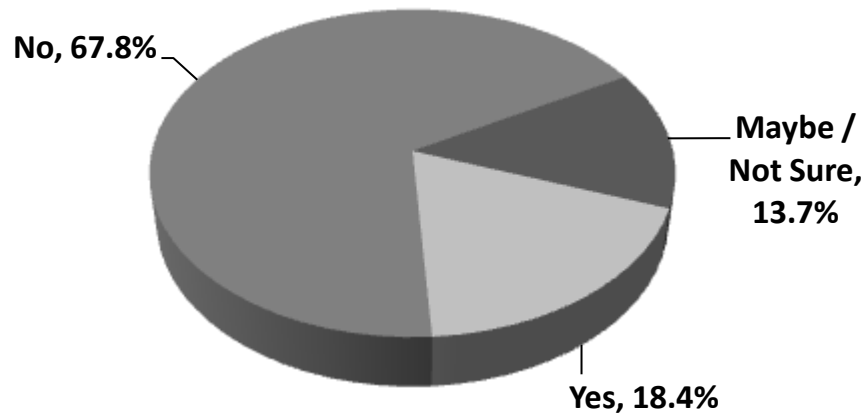


FIGURE 5.46 - Question: In the past 12 months, do you recall seeing any travel articles – either digitally or in print featuring leisure travel to Washington, DC? Base: All respondents (weighted data). 4,286 completed surveys.

Recall of Television Features about Washington, DC

As PR efforts also extended to television media, respondents were asked if they recalled seeing any leisure travel features on television about Washington, DC. In total, 15.8 percent reported having seen such a story on television, down slightly from 17.1 percent in 2014.

Figure 5.47 – In the past 12 months, do you recall seeing any travel stories or features on television about leisure travel to Washington, DC?

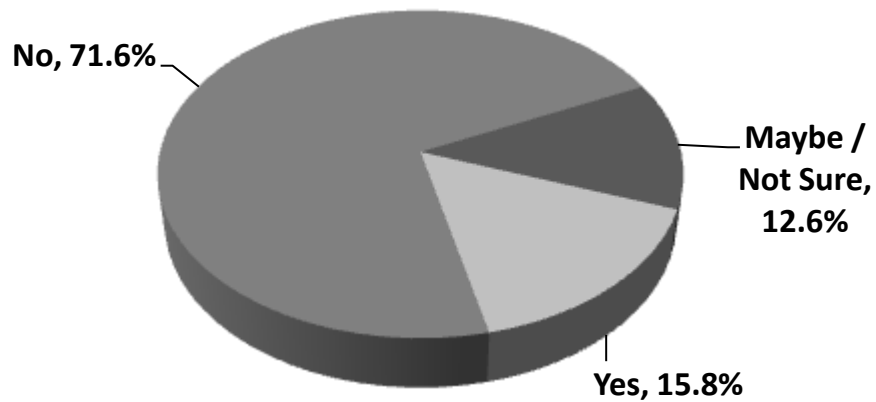


FIGURE 5.47 - Question: In the past 12 months, do you recall seeing any travel stories or features on television about leisure travel to Washington, DC? Base: All respondents (weighted data). 4,286 completed surveys.

Recall of Washington, DC in Social Media

Survey respondents were asked if they recalled seeing social media posts by their friends and family about travel to Washington DC. Nearly one quarter (23.8%) said that recall such posts in the past 12 months.

Figure 5.48 – In the past 12 months, do you recall any of your friends of family posting pictures, stories or information on social media websites (Facebook, Twitter, Instagram, etc.) about travel to Washington, DC?

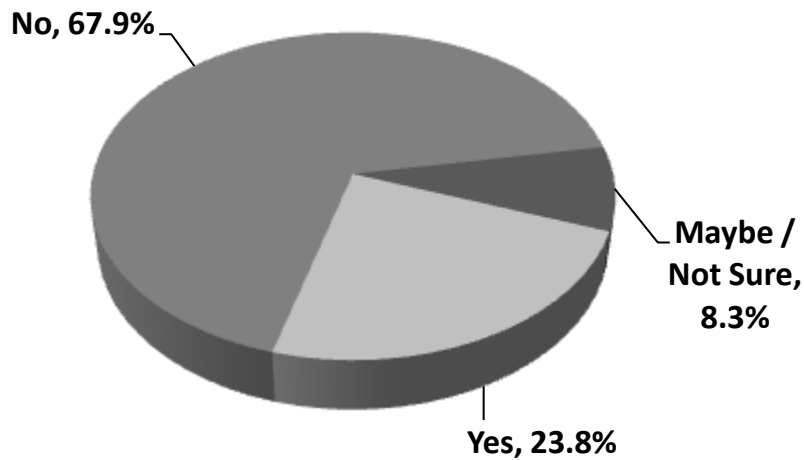


FIGURE 5.48 - Question: In the past 12 months, do you recall any of your friends of family posting pictures, stories or information on social media websites (Facebook, Twitter, Instagram, etc.) about travel to Washington, DC? (Select one)
Base: All respondents (weighted data). 4,286 completed surveys.

Likelihood to Recommend Washington, DC

Survey respondents were asked how likely they would be to recommend Washington, DC as a place to visit. In total, 49.4 percent said they were “likely” or “very likely” to do so; another 29.2 percent said they were “somewhat likely”.

Figure 5.49 – How likely are you to recommend Washington, DC as a place to visit to family members, friends and/or colleagues? (Select one)

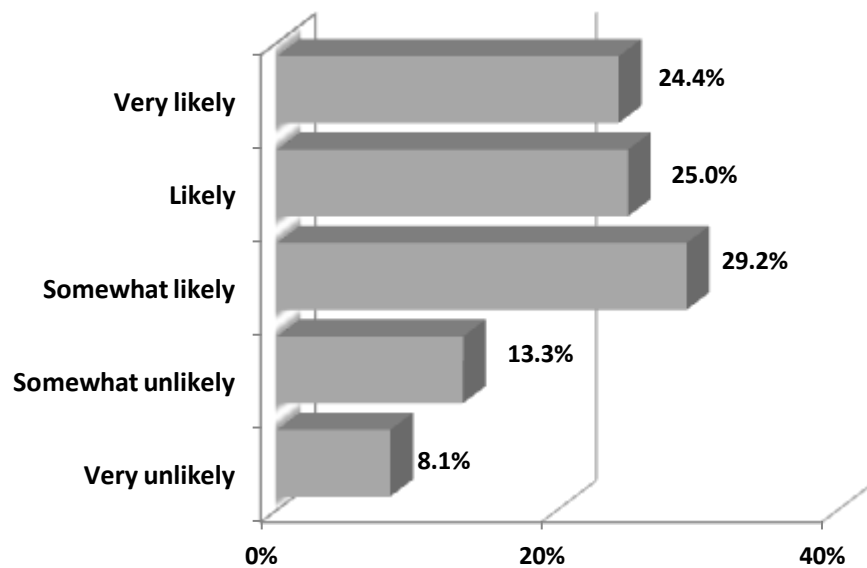


FIGURE 5.49 - Question: How likely are you to recommend Washington, DC as a place to visit to family members, friends and/or colleagues? (Select one) Base: All respondents (weighted data). 4,286 completed surveys.

Washington, DC Emojis

As a final core question, survey respondents were shown emojis developed by Destination DC and asked about their effect on reception to Washington, DC. These images were well-rated by respondents, with nearly one in five (17.5%) saying they generated a very positive feeling about the city. Very few potential travelers gave these emojis a negative rating.

Figure 5.50 – What effect do these Washington, DC emojis have on your general feelings towards Washington, DC?

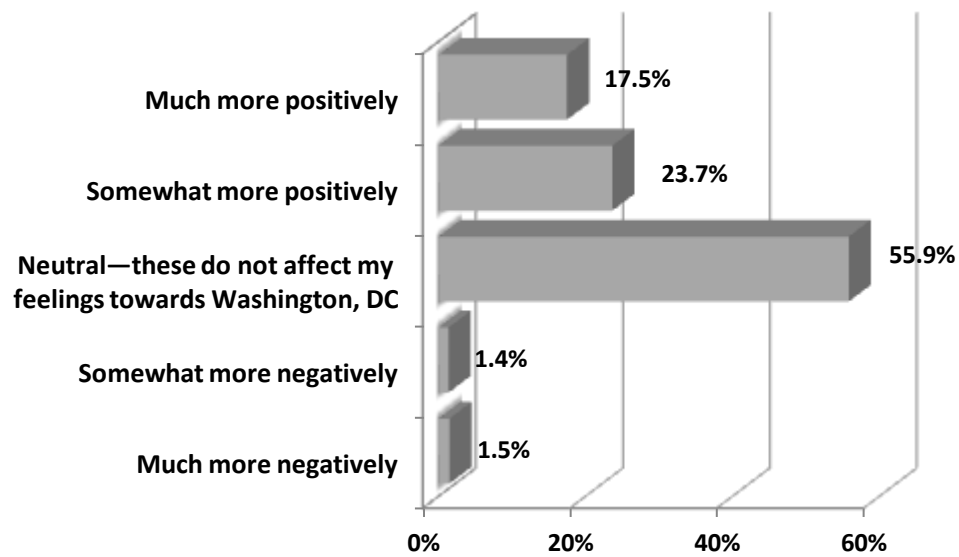


FIGURE 5.50 - Question: What effect do these Washington, DC emojis have on your general feelings towards Washington, DC? Base: All respondents (weighted data). 4,286 completed surveys.

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 57.4 percent being women.

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

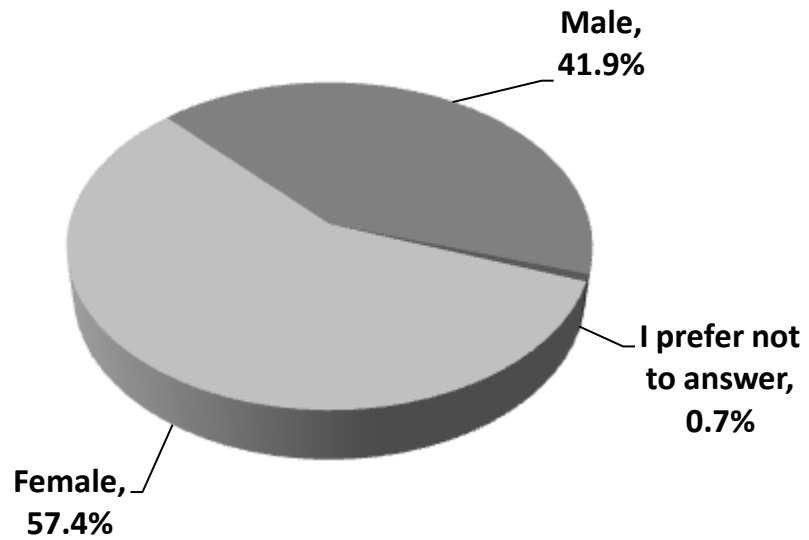


TABLE 6.1 – Question: What is your gender? (Select one) Base: All respondents (weighted data). 4,286 completed surveys.

Age

The mean age of survey respondents is 48.2 years. 31.1 percent are between the ages of 21 and 34.

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

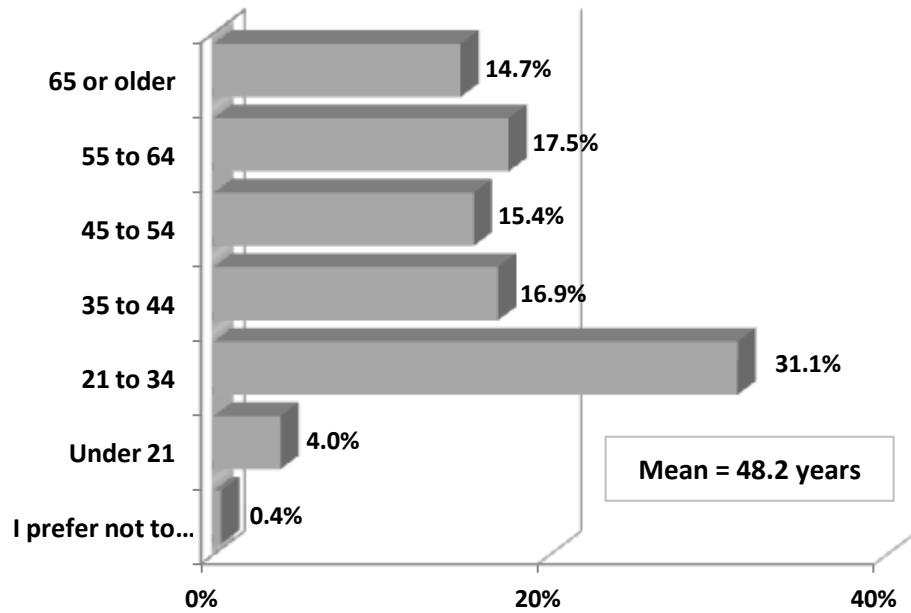


FIGURE 6.2 - Question: Which best describes your age? (Select one.) Base: All respondents (weighted data). 4,286 completed surveys.

Employment Status

The majority of survey respondents are employed in some capacity (59.5%). 39.2 percent are employed full-time and another 7.4 percent are self-employed. 12.8 percent are employed part-time.

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

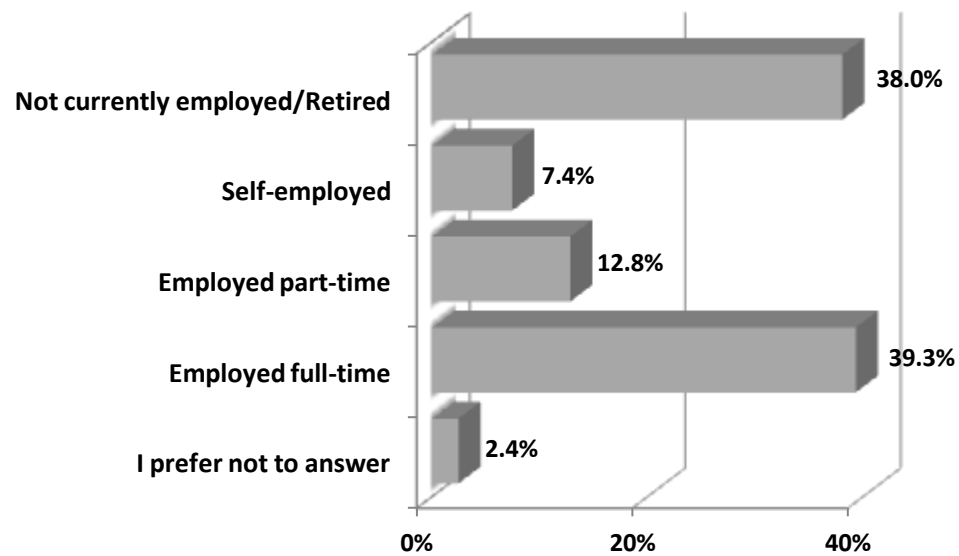


FIGURE 6.3 - Question: Which best describes your current employment status? (Select one) Base: All respondents (weighted data). 4,286 completed surveys.

Formal Education

Figure 6.4 illustrates that nearly three quarters of survey respondents have at least some college education. 38.2 percent holds a bachelor's degree, including 15.2 percent who have some graduate school education or more.

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

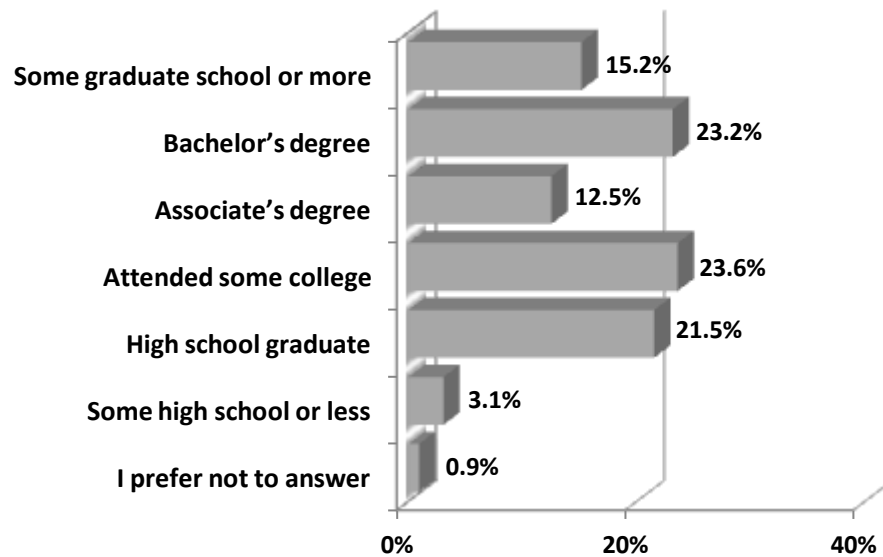


FIGURE 6.4 - Question: Which best represents the highest level of formal education you have completed? (Select one)
Base: All respondents (weighted data). 4,286 completed surveys.

Annual Household Income

The average annual household income of survey respondents is \$63,127 with 50.6 percent having an annual household income above \$50,000.

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

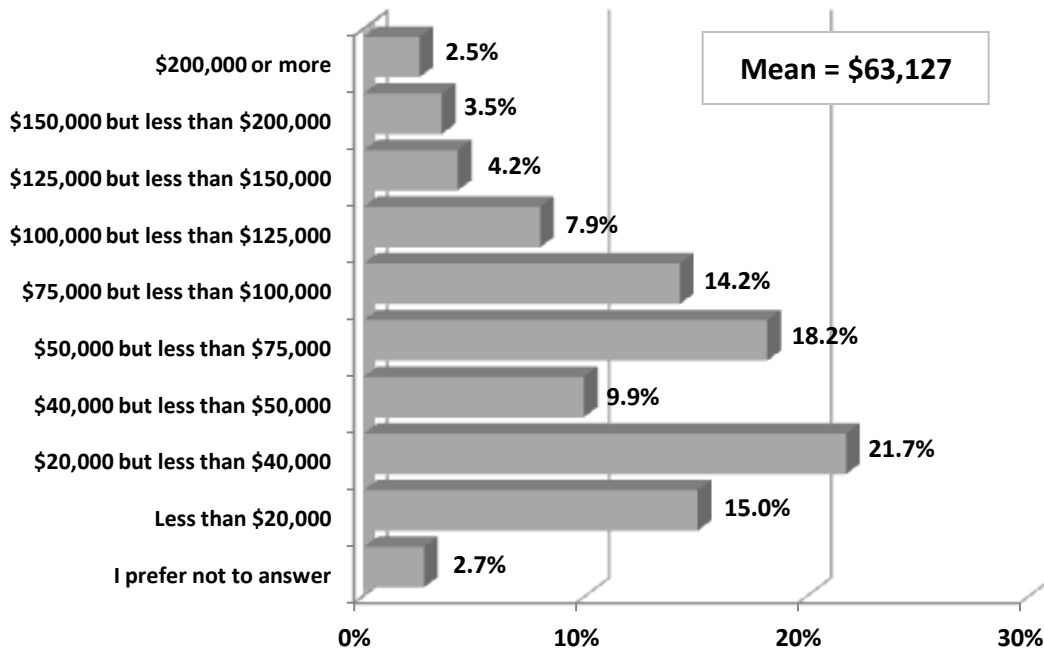


FIGURE 6.5 - Question: Which of the following best describes the combined annual income of all members of your household? (Select one.) Base: All respondents (weighted data). 4,286 completed surveys.

Ethnic Background

The vast majority (71.8%) of respondents identifies as Caucasian. 14.1 percent is African-American. Asian-Pacific Islanders represented 4.5 percent of respondents and Latino-Hispanics 6.3 percent.

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

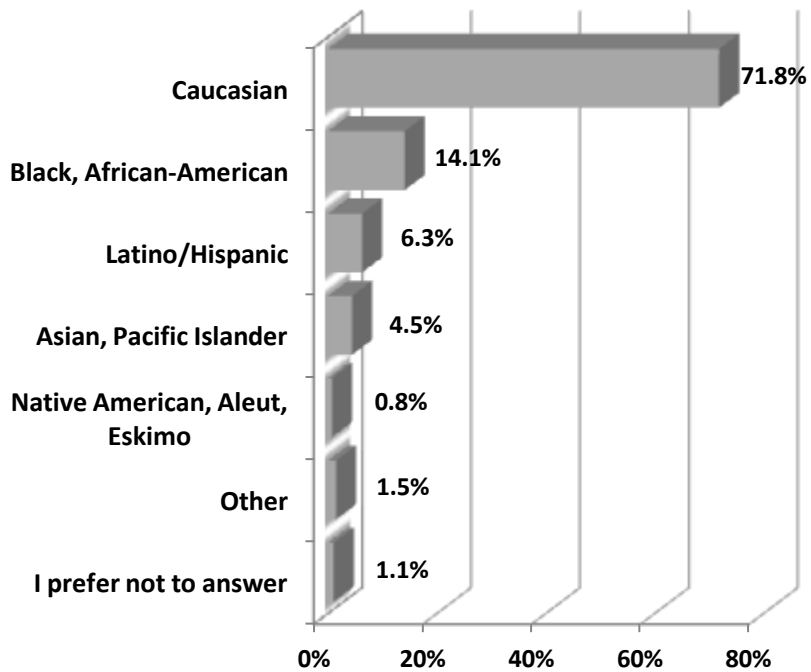


FIGURE 6.6 - Question: Which best describes your race or ethnic background (Select one) Base: All respondents (weighted data). 4,286 completed surveys.

Marital Status

Figure 6.8 (below) shows the proportion of survey respondents in each marital status category. 55.2 percent of survey respondents reported being married or in a domestic partnership. 40.8 percent are single. 17.7 percent has children under age 18.

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

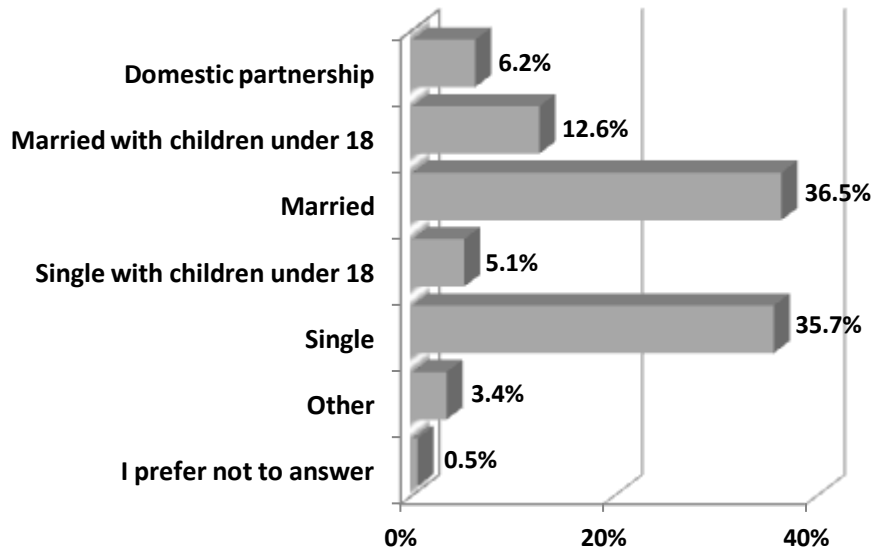


FIGURE 6.7 - Question: Which of the following best describes your current marital status? (Select one.) Base: All respondents (weighted data). 4,286 completed surveys.

GLBT

5.7 percent of survey respondents identified as GLBT.

Figure 6.8: Which best describes you? (Select one)

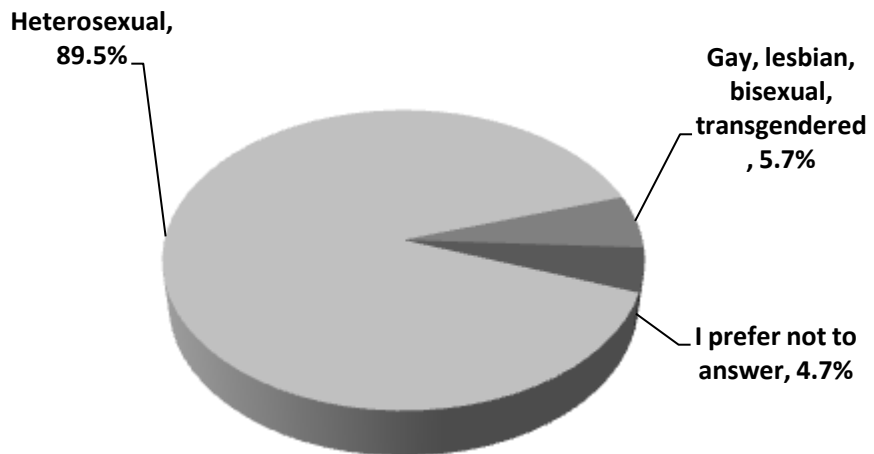


FIGURE 6.8 - Question: Which best describes you? (Select one) Base: All respondents (weighted data). 4,286 completed surveys.

Appendix I: Comparison to Past Studies

The table below shows key results from Destination DC's advertising effectiveness research over the past seven years. The research technique used changed in 2008. We therefore suggest that caution be used in any attempt to draw inter-year comparison between the studies conducted prior to 2008. However, as a reference, the table below shows key information and statistics from and about all seven waves of research.

	2006	2007	2008	2009	2010	2013	2014	2015
Survey field dates	October	Sept./Oct.	Dec.	Sept./Oct.	Sept./Oct.	Nov.	Oct.	Oct.
Data collection technique	Online survey	Online survey	Online survey	Online survey	Online survey	Online survey	Online survey	Online survey
Sample size	600	597	4,556	4,123	3,931	3,876	4,619	4,286
Campaign period	May-Sept	May-Sept	Apr-Dec	May-Sept	May-Sept	Feb-Aug	Feb-Sept	Feb-Sept
Percent of population visiting DC	20.7%	17.4%	19.0%	16.2%	15.0%	19.4%	17.7%	15.1%
Overall advertising awareness	26.0%	17.3%	19.0%	20.6%	20.2%	24.1%	30.8%	32.5%
Incremental travel	7.8%	7.6%	8.1%	9.0%	9.2%	13.0%	8.6%	7.6%
Visitor spending per trip	\$748	\$760	\$678	\$635	\$799	\$876.99	\$849.92	\$961.84
Total visitor spending in DC	\$350.8 million	\$217.8 million	\$53.4 million	\$58.8 million	\$52.0 million	\$80.2 million	\$98.4 million	\$138.1 million
Total advertising spending	\$987,939	\$550,000	\$1,339,057	\$1,338,057	\$1,430,416	\$3,000,007	\$3,000,007	\$4,000,000
ROI (Economic impact/Ad spending)	\$355.0	\$396.0	\$39.9	\$48.4	\$36.4	\$26.72	\$32.81	\$34.52
Taxes generated for Washington D.C.	\$9,299,792	\$4,989,086	\$3,734,568	\$4,145,633	\$3,130,395	4,956,407	7,632,228	10,591,443

Appendix II: Subsamples and Reliability

The estimates emerging from this study are based on weighted data from a large sample collected across the region and in targeted metropolitan areas. The table below shows the samples collected and corresponding data reliability calculated at a 95% confidence level.

	Overall Sample Size	Confidence Interval (95% Confidence Level)
New York DMA	655	+/- 3.8%
Philadelphia DMA	655	+/- 3.8%
Richmond DMA	655	+/- 3.8%
Boston DMA	655	+/- 3.8
Chicago DMA	656	+/- 3.8%
Other East Coast areas	1010	+/- 3.0%
Total	4,286	+/- 1.5%

Appendix III: Survey Questionnaire

The complete survey questionnaire is presented following.

Destination DC 2015 Advertising Effectiveness Study

*Title will not be shown

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 about 15 minutes to complete.

1) Are you 18 years of age or older?

- Yes
- No **[TERMINATE]**

2) In which state do you reside?

- Connecticut
- Delaware
- District of Columbia **[TERMINATE]**
- Georgia
- Illinois
- Indiana
-
- Maryland
- Massachusetts
- New Hampshire
- New Jersey
- New York
- North Carolina
- Ohio
- Pennsylvania
- Rhode Island
- South Carolina
- Virginia
- Vermont
- West Virginia
- NONE OF THESE **[TERMINATE]**

[BRANCHING NOTE: TERMINATE WHEN SAMPLE QUOTAS IN EACH MARKET MET. SKIP TO Q2B]

2B) What is your home zip code?

3) Which of these television networks and programs have you watched at least once in the past 12 months?

- NBC's *The Today Show*
- The Tennis Channel

- Animal Planet
- BET
- CMT
- Food Network
- Galavision
- HGTV
- History Channel
- MTV
- NBC Universo
- Nick@Nite
- Nickelodeon
- Outdoor Channel
- Syfy
- Travel Channel
- TruTV

4) 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 Magazine
- Atlanta Magazine
- Baltimore Magazine
- Boston Magazine
- Chicago Magazine
- Condé Nast Traveler
- Essence Magazine
- Food & Wine Magazine
- New Jersey Monthly Magazine
- New York Magazine
- The New Yorker
- Passport Magazine
- Pathfinders Travel Magazine
- Philadelphia Magazine
- Richmond Magazine
- Smithsonian Magazine
- Southern Living Magazine
- Travel + Leisure Magazine
- Vanity Fair Magazine
- Wired Magazine

5) Which of these websites do you recall visiting at least once in the past 12 months? (Select all that apply)

- Atlantamagazine.com
- Baltimoremagazine.net
- Bostonmagazine.com
- CNTraveler.com
- NYTimes.com
- NYMag.com
- NewYorker.com
- NJMonthly.com
- Orbitz.com

- Passportmagazine.com
- PhillyMag.com
- Richmondmagazine.net
- ShermansTravel.com
- Smithsonian.com
- SouthernLiving.com
- TravelandLeisure.com
- TravelZoo.com

6) Which of these website search engines do you recall using at least once in the past 12 months?

- Bing
- Google
- Yahoo!

[BRANCHING NOTE: ASK Q7 OF VIRGINIA AND NORTH CAROLINA RESIDENTS ONLY]

7) Which of these radio stations do you recall listening to at least once in the past 12 months?

- Katz radio group (INSERT RADIO STATIONS)
- WAFX-FM - Classic Rock
- WCPK-AM - Religion
- WGH-AM - Urban Inspirational
- WGH-FM - Country
- WGPL-AM - Gospel
- WHBT-FM - Urban Contemporary
- WHRO-FM - Non-Commercial
- WHRV-FM - National Public Radio
- WJLZ-FM - Non-Commercial
- WJOI-AM - Easy Listening
- WKGM-AM - Religion
- WKQA-AM - Religion
- WMOV-FM - Rhythmic AC
- WNIS-AM - News/Talk
- WNOB-FM - Adult Hits
- WNOH-FM - Contemporary Hit Radio
- WNOR-FM - Album Oriented Rock
- WNSB-FM - Non-Commercial College Radio Station
- WNVZ-FM - Rhythmic CHR
- WOWI-FM - Urban Contemporary
- WPCE-AM - Gospel
- WPMH-AM - Religion
- WPTE-FM - Modern Adult Contemporary
- WROX-FM - Alternative/Modern Rock
- WTAR-AM - Sports
- WUSH-FM - Country
- WVBW-FM - Adult Contemporary
- WVHT-FM - Contemporary Hit Radio
- WVKL-FM - Urban Adult Contemporary
- WVSP-FM - Sports
- WVXX-AM - Spanish Contemporary

- WWDE-FM - Adult Contemporary
- WXGM-FM - Adult Contemporary
- WXTG-FM - Adult Alternative Rock
- WZLV-FM - Non-Commercial

8) Have you flown on a United Airlines flight in the past 12 months?

- Yes
- No

9) 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

[BRANCHING NOTE: IF RESPONSE TO Q9 IS < 1, SKIP TO Q32]

10) Assume that you want to take a getaway trip to an urban destination within the U.S. that offers great hotels, dining, shopping, entertainment, outdoor activities and other unique experiences. What cities first come to mind?

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

City: _____

City: _____

City: _____

City: _____

11) In the past 12 months, which of these cities did you visit for leisure or personal reasons? (Select all that apply)

- Atlanta, GA
- Baltimore, MD
- Boston, MA
- Chicago, IL
- Miami, FL
- Los Angeles, CA
- New York City, NY
- Orlando, FL
- Portland, OR
- Philadelphia, PA
- Pittsburgh, PA
- Raleigh, NC
- Richmond, VA

- San Francisco, CA
- Seattle, WA
- Washington, DC
- NONE OF THE ABOVE

12) At any point in July, August, or September 2015, did you visit or pass through Times Square in New York City?

- Yes
- No

13) At any point in March 2015, did you visit or pass through Penn Station in New York City?

- Yes
- No

[BRANCHING NOTE: IF RESPONDENT DID NOT SELECT "WASHINGTON, DC" IN Q14, SKIP TO Q32]

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

_____ Leisure Trips

[BRANCHING NOTE: IF RESPONSE TO Q15 IS < 1, SKIP TO QUESTION 31]

15) In which month(s) did you visit Washington, DC on a leisure trip(s)? (Select all that apply)

- September 2014
- October 2014
- November 2014
- December 2014
- January 2015
- February 2015
- March 2015
- April 2015
- May 2015
- June 2015
- July 2015
- August 2015
- September 2015
- October 2015

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

16) Which best describes your reason for visiting Washington, DC on this most recent leisure trip?

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

17) On this trip to the Washington, DC area, in what type of lodging did you stay? (Select all that apply)

- Hotel, motel or inn
- Home sharing or vacation home rental (i.e. booked through AirBnB, VRBO or similar)
- Residence of friend or family member
- None of these (I was on a day trip or just passing through)

[BRANCHING NOTE: IF RESPONDENT SELECTED "NONE OF THESE (I WAS ON A DAY TRIP OR JUST PASSING THROUGH", SKIP TO QUESTION 22]

18) On this trip to the Washington, DC area, where did you stay overnight? (Select all that apply)

- Inside the city of Washington, DC
- Outside the city of Washington, DC--in northern Virginia (e.g. Alexandria, Arlington, Fairfax, Tysons Corner, etc.)
- Outside the city of Washington, DC--in southern Maryland (e.g. Bethesda, Silver Spring, Rockville, National Harbor, etc.)
- Other

19) How many total days did you stay in the Washington, DC metropolitan area? Please enter a numeric value below.

_____ Days

20) How many of these days were spent inside the city of Washington, DC?

_____ Days

[BRANCHING NOTE: IF RESPONDENT DID NOT SELECT "INSIDE THE CITY OF WASHINGTON, DC" IN Q18, SKIP TO Q23]

21) Approximately how much PER DAY did you spend on the following while in the city of Washington, DC? (Please do not include any spending outside the District of Columbia, e.g. any expenses incurred in Virginia or Maryland.)

Lodging (before tax)	\$ _____ per day in Washington, DC
Restaurants & dining	\$ _____ per day in Washington, DC
Retail purchases	\$ _____ per day in Washington, DC
Entertainment (Theatre, Museums, Sporting Events)	\$ _____ per day in Washington, DC
Tours (Bike, Walking, Bus)	\$ _____ per day in Washington, DC
Other Entertainment & sightseeing	\$ _____ per day in Washington, DC
Gas, parking & local transportation	\$ _____ per day in Washington, DC
Other	\$ _____ per day in Washington, DC

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

_____ people

[BRANCHING NOTE: SKIP TO Q25]

23) Approximately how much PER DAY did you spend on the following while in the city of Washington, DC? (Please do not include any spending outside the District of Columbia, e.g. any expenses incurred in Virginia or Maryland.)

Restaurants & dining	\$ _____ per day in Washington, DC
Retail purchases	\$ _____ per day in Washington, DC
Entertainment (Theatre, Museums, Sporting Events)	\$ _____ per day in Washington, DC
Tours (Bike, Walking, Bus)	\$ _____ per day in Washington, DC

Other Entertainment & sightseeing	\$ _____ per day in Washington, DC
Gas, parking & local transportation	\$ _____ per day in Washington, DC
Other	\$ _____ per day in Washington, DC

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

_____ people

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

_____ people

29) How many of the people in your immediate travel party were children? Please write in the number of children in each age category below.

Children under age 6: _____
 Children age 6-10: _____
 Children age 11-13: _____
 Children age 14-17: _____

30) Which of the following were IMPORTANT to your decision to make this visit to Washington, DC? (Select all that apply)

- Architecture
- Washington, DC has an authentic vibe
- Washington, DC's diverse cultural and international environment
- There is always something appealing and exciting happening in Washington, DC
- Friends or family in the area
- I got a good deal on hotel, airfare and/or other travel components
- Lifelong desire to visit Washington, DC
- Locations where films/TV shows were filmed
- Washington, DC is affordable to visit
- Washington, DC is family-friendly
- History/ historical attributes
- Museums
- Monuments
- Free attractions
- Restaurants, cuisine, food scene
- Shopping opportunities
- Social and ethnic diversity
- Special event and/or festival
- Sports or sports event
- Theater and/or other performing arts/concerts/live music
- Unique neighborhoods
- Nightlife
- Overall ambiance and atmosphere

31) How familiar are you with Washington, DC as a place to visit for leisure?

- Very familiar
- Somewhat familiar
- Somewhat unfamiliar
- Not at all familiar

32) How likely are you to visit Washington, DC 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

33) If you were to visit Washington, DC for leisure or personal reasons in the next 12 months, in what type of lodging would you most likely stay? (Select all that apply)

- Hotel, motel or inn
- Home sharing or vacation home rental (i.e. booked through AirBnB, VRBO or similar)
- Residence of friend or family member
- Other. Please specify: _____
- None of these. I am very unlikely to stay overnight in Washington, DC

34) In the past 12 months, do you recall seeing and/or hearing any advertisements (i.e. in magazines, television, online, billboards, on the radio or at an event) for leisure travel to Washington, DC?

- Yes
- No
- Maybe / Not Sure

35) Where did you see and/or hear this advertising? (Select each of the following media in which you recall having seen a Washington, DC travel advertisement in the past 12 months.)

- Magazine
- Internet—desktop/laptop/tablet
- Internet—smartphone/mobile device
- Radio
- Television
- Events
- Outdoors/Billboard/Bus/Taxi
- None of the above

We would like to ask you a few questions about some recent Washington, DC travel

advertisements.

Please carefully examine these print advertisements. After reviewing these ads, please answer the question below.

[SHOW PRINT ADS]

36) During the past 12 months, do you recall having seen any of these advertisements in any magazines?

- Yes
- No
- Maybe / Not Sure

Now please carefully watch this video advertisement and answer the question below.

[PLAY TV AD]

37) During the past 12 months, do you recall having these advertisements anywhere on television?

- Yes
- No
- Maybe / Not Sure

Now please carefully examine these digital advertisements and then answer the question below.

[SHOW DIGITAL DISPLAY ADS]

38) During the past 12 months, do you recall having seen these advertisements anywhere online, including your smartphone or mobile device?

- Yes
- No
- Maybe / Not Sure

Now please carefully watch this video advertisement and then answer the question below.

[PLAY DIGITAL VIDEO AD]

39) During the past 12 months, do you recall having seen any part of this advertisement anywhere on online?

- Yes
- No
- Maybe / Not Sure

Now please carefully review these images of a live television event and then answer the question below.

[PLAY DIGITAL VIDEO AD]

40) During the past 12 months, do you recall having seen this during The Today Show?

- Yes
- No
- Maybe / Not Sure

[BRANCHING NOTE: ONLY SHOW QUESTIONS 41-43 TO RESIDENTS OF NEW YORK, NEW JERSEY AND CONNECTICUT AND ANYONE WHO VISITED NEW YORK CITY/TIMES SQUARE/PENN STATION]

Now please carefully watch this video advertisement and answer the question below.

[SHOW OUTDOOR VIDEO AD]

41) Do you recall seeing this ad in Times Square in New York City at some point in the past 12 months?

- Yes
- No
- Maybe / Not Sure

Now please carefully review these images of an event and then answer the question below.

[SHOW PENN STATION EVENT IMAGES]

42) Do you recall seeing this event in Penn Station (New York)?

- Yes
- No
- Maybe / Not Sure

Now please carefully review the images of an event that will appear and then answer the question below.

43) Do you recall seeing this as part of the NYC Barbeque Block Party?

- Yes
- No
- Maybe / Not Sure

[BRANCHING NOTE: ONLY SHOW QUESTION 44 TO RESIDENTS OF CHICAGO MSA, PHILADELPHIA MSA, NEW YORK, NEW JERSEY AND CONNECTICUT AND ANYONE WHO VISITED NEW YORK CITY, CHICAGO, OR PHILADELPHIA]

Now please carefully examine these outdoor advertisements and then answer the question below.

[SHOW TAXI AND BUS WRAP ADS]

44) Do you recall seeing these advertisements on any buses or taxis?

- Yes
- No
- Maybe / Not Sure

[NOTE: ONLY SHOW QUESTION 45 TO RESIDENTS OF VIRGINIA AND NORTH CAROLINA]

Now please carefully listen to the advertisement and answer the question below.

[PLAY RADIO AD]

45) During the past 12 months, do you recall having heard any of these advertisements on the radio?

- Yes
- No
- Maybe / Not sure

[NOTE: ONLY SHOW QUESTION 46 TO RESIDENTS OF MARYLAND]

Now please carefully review these images of an event and then answer the question below.

[SHOW BEST OF BALTIMORE EVENT IMAGES]

46) Do you recall seeing this as part of the Baltimore Magazine Best of Baltimore event?

- Yes
- No
- Maybe / Not sure

47) After viewing this series of advertisements, overall, how effective do you think these

advertisements are in portraying Washington, DC 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

48) Overall, how effective do you think these advertisements are in portraying the following aspects of Washington, DC? (Use the five point scale below where 1 represents "Very ineffectively" and 5 represents "Very effectively")

The advertisements portray this aspect of Washington, DC...

	Very ineffectively (1)	Ineffectively (2)	Neither effectively nor ineffectively (3)	Effectively (4)	Very effectively (5)
A good vacation value for the money	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
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, in addition to monuments and museums	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
A place that offers a unique vacation 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 good place to visit on a friends trip	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
A place to be	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

inspired					
A place where the delightfully unexpected can happen	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
A place that offers a variety of free or affordable attractions and activities	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
A place that has changed greatly over the last 5-10 years.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
A place with many interesting and exciting nightlife options.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
A place with a vibrant food and dining scene.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
A place where there is always something new happening	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

49) How did the advertisements you viewed today affect your likelihood to visit Washington, DC for leisure in the next 12 months?

- I'm more likely to visit Washington, DC for leisure in the next 12 months.
- Unchanged. I am not more or less likely to visit Washington, DC for leisure in the next 12 months.
- I'm less likely to visit Washington, DC for leisure in the next 12 months.
- I don't know.

[BRANCHING NOTE: IF RESPONDENT TRAVELED TO WASHINGTON, DC (RESPONSE TO Q10 IS > 1, AND REPORTED SEEING ONE OR MORE OF THE DESTINATION DC ADS (SELECTED "YES" TO ONE OR MORE OF QUESTIONS 35-41), CONTINUE. ALL OTHERS, SKIP TO Q47]

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

- Yes
- No
- Maybe / Not Sure

51) How important was this advertising to your decision to visit Washington, DC?

- Very important
- Important
- Neither important nor unimportant
- Unimportant
- Very unimportant

52) When you saw the advertisement(s) for Washington, DC, 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 Washington, DC
- I was interested in visiting Washington, DC but hadn't made travel plans yet
- I was just considering destinations for a trip
- I had no plans to travel

53) In the past 12 months, do you recall seeing any travel articles—either digitally or in print—featuring leisure travel to Washington, DC?

- Yes
- No
- Maybe / Not Sure

54) In the past 12 months, do you recall seeing any travel stories or features on television about leisure travel to Washington, DC?

- Yes
- No
- Maybe / Not Sure

55) In the past TWELVE (12) MONTHS do you recall any of your friends or family posting pictures, stories or information on social media websites (Facebook, Twitter, Instagram, etc.) about travel to Washington, DC?

- Yes
- No
- Maybe / Not Sure

56) How likely are you to recommend Washington, DC as a place to visit to family members, friends and/or colleagues?

- Very likely
- Likely
- Somewhat likely
- Somewhat unlikely

- Very unlikely

Destination DC, the official marketing organization for the District of Columbia, offers these special Washington, DC emojis free for your keyboard.

[SHOW EMOJIS]

57) What effect do these Washington, DC emojis have on your general feelings towards Washington, DC?

- I feel much more positively towards Washington, DC
- I feel somewhat more positively towards Washington, DC
- Neutral—these do not affect my feelings towards Washington, DC
- I feel somewhat more positively towards Washington, DC
- I feel somewhat more positively towards Washington, DC

58) What is your gender? (Select one)

- Male
- Female
- I prefer not to answer

59) Which best describes your age? (Select one)

- Under 21
- 21 to 34
- 35 to 44
- 45 to 54
- 55 to 64
- 65 or above
- I prefer not to answer

60) 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

61) 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 or more
- I prefer not to answer

62) Which best describes the combined annual income of all members of your household?

(Select one)

- Less than \$20,000
- \$20,000 but less than \$40,000
- \$40,000 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

63) Which best describes your race or ethnic background? (Select one)

- White/Caucasian
- Black/African-American
- Hispanic/Latino
- Asian/Pacific Islander
- Other
- Two or more of the above
- I prefer not to answer

64) Which best describes your marital status? (Select one)

- Single
- Single with children under age 18
- Married
- Married with children under age 18
- Domestic Partnership
- Other
- I prefer not to answer

65) Which best describes you? (Select one)

- Heterosexual
- Lesbian/Gay//Bisexual/Transgender
- I prefer not to answer

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