

NORTH  STAR

+ Manassas, VA

Research Report

June 2024

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Brand Barometer

Brand Barometer

OVERVIEW

Purpose

The Community Brand Barometer measures strength of the Manassas brand according to:

- Resident satisfaction with and advocacy for Manassas as a place to live, visit, and conduct business.
- Manassas satisfaction/advocacy relative to North Star's nationwide clients.

Methodology + Results

Significant research* on a wide variety of customer satisfaction metrics found a single powerful question has the greatest ability both to measure current resident satisfaction and predict future community growth. That question, "Would you recommend your community to a friend or colleague as a place to live (or work or visit)?" is powerful because it surpasses the basic model of economic exchange, where money is spent for products or services. People who score their community high on the Brand Barometer actively recruit new residents, visitors, and businesses through positive word-of-mouth marketing. It is very personal. By making a strong recommendation, they are willing to risk their own character, trustworthiness, and overall reputation for no tangible reward.

**Research conducted by Satmetrix Systems, Inc., Bain & Company and Fred Reichheld, author of "The One Number You Need to Grow," Harvard Business Review (Dec. 2003).*

Brand Barometer

OVERVIEW

Methodology + Results (cont'd.)

The methodology for the Brand Barometer has been carefully developed and determined to be statistically significant. Participants in the community-wide surveys answered three questions:

- Would you recommend living in Manassas to a friend or colleague?
- Would you recommend visiting Manassas to a friend or colleague?
- Would you recommend conducting business in Manassas to a friend or colleague?

Responses are measured on a 10-point scale with 1 being “Not at all likely” and 10 being “Extremely likely.” Results are presented on an individual respondent level as well as an aggregate Brand Advocacy Score. Scores are calculated with response percentages in the following categories:

- Promoters (9 or 10) – Loyal residents who will continue fueling your growth and promoting your brand
- Passives (7 or 8) – Satisfied but unenthusiastic residents who are vulnerable to other opinions and brand
- Detractors (1-6) – Unhappy residents who can damage your brand and impede growth through negative referrals

$$\text{Brand Advocacy Score} = \% \text{ Promoters} - \% \text{ Detractors}$$

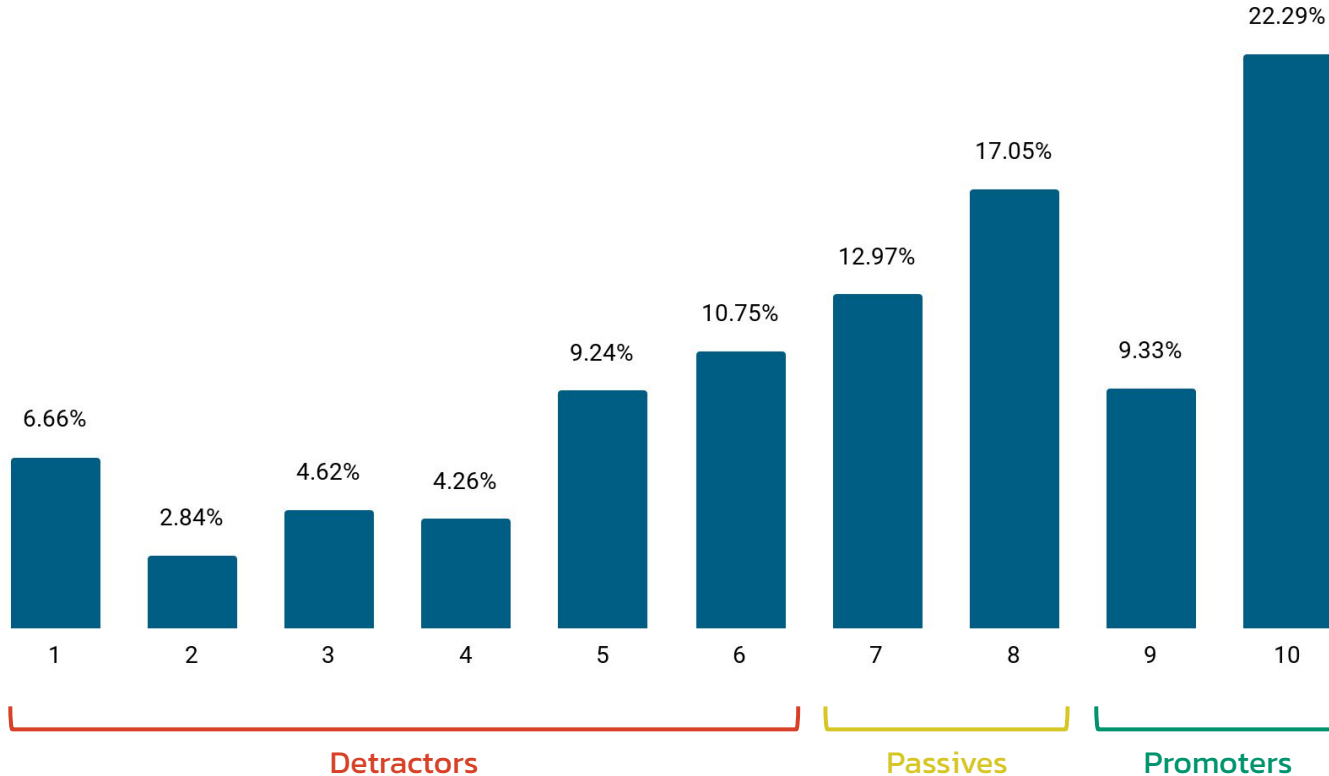
Manassas' Brand Advocacy Score can then be compared to a benchmark score that has been derived for the entire nation. You can use this information to track your own brand performance relative to national trends over time.

1,118 residents contributed to this latest measurement, allowing for a margin of error of **±2.93%**.

Brand Barometer

On a scale of 1 to 10, with 1 being "not at all likely" and 10 being "extremely likely," how likely would you be to recommend...

Living in Manassas

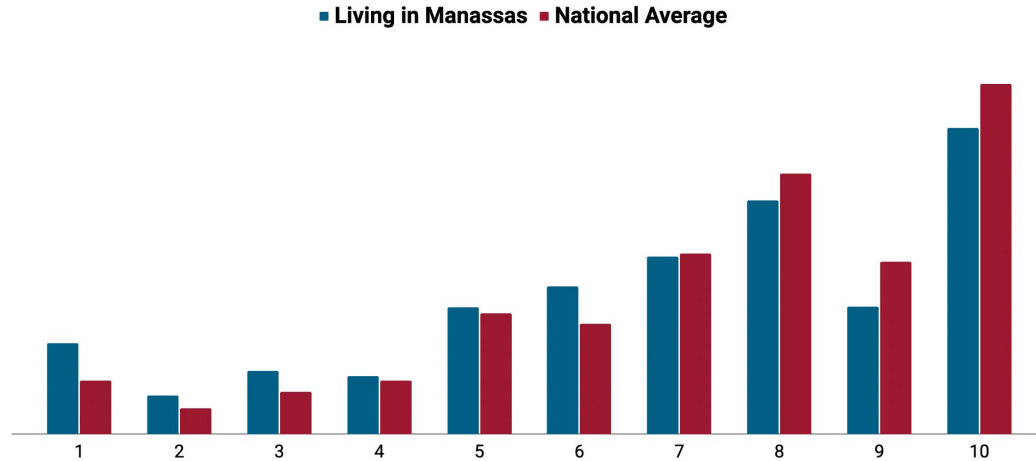


Brand Barometer

On a scale of 1 to 10, with 1 being “not at all likely” and 10 being “extremely likely,” how likely would you be to recommend...

Living in Manassas

	Living in Manassas	Manassas Totals	National Average	National Totals
1	6.66%	38.37%	3.94%	29.73%
2	2.84%		1.90%	
3	4.62%		3.12%	
4	4.26%		3.92%	
5	9.24%		8.80%	
6	10.75%		8.06%	
7	12.97%	Passives	13.16%	Passives
8	17.05%	30.02%	19.01%	32.18%
9	9.33%	Promoters	12.55%	Promoters
10	22.29%	31.62%	25.54%	38.09%



Brand Barometer

On a scale of 1 to 10, with 1 being "not at all likely" and 10 being "extremely likely," how likely would you be to recommend...

Living in Manassas

-6.75%

Overall Brand Advocacy Score
Living in Manassas

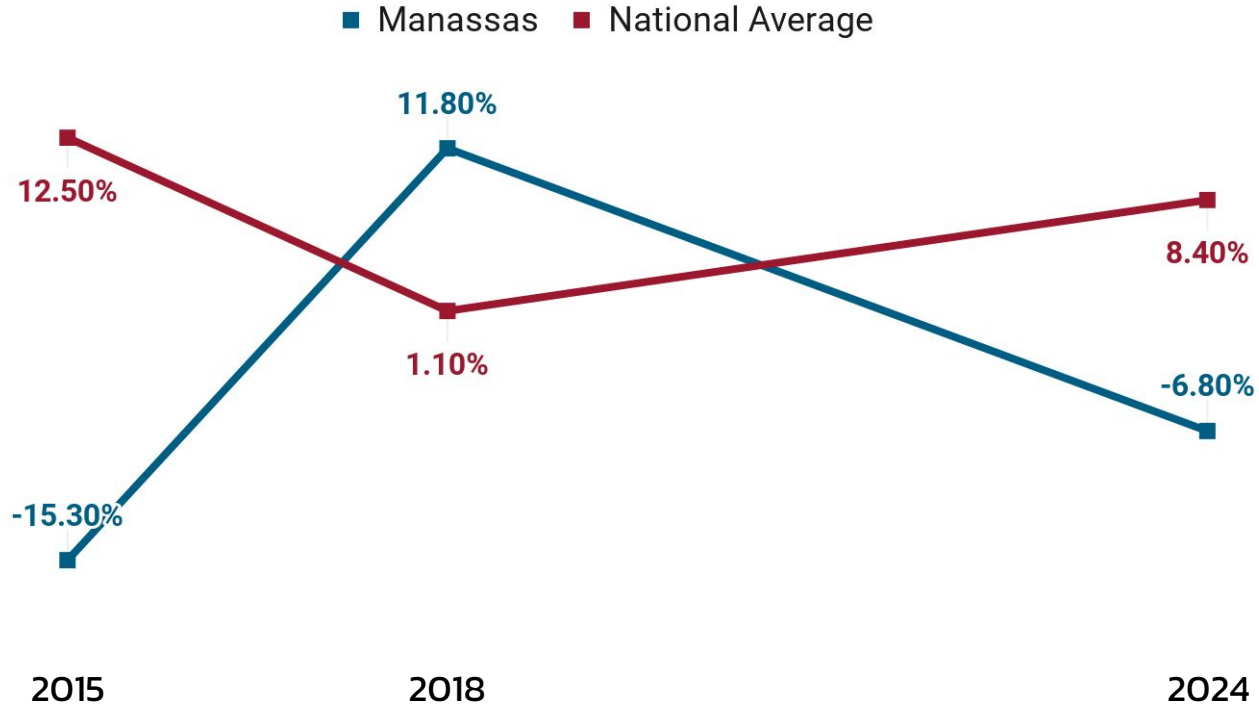
(% of Promoters minus % of Detractors)

Brand Barometer

By Survey Year

On a scale of 1 to 10, with 1 being "not at all likely" and 10 being "extremely likely," how likely would you be to recommend...

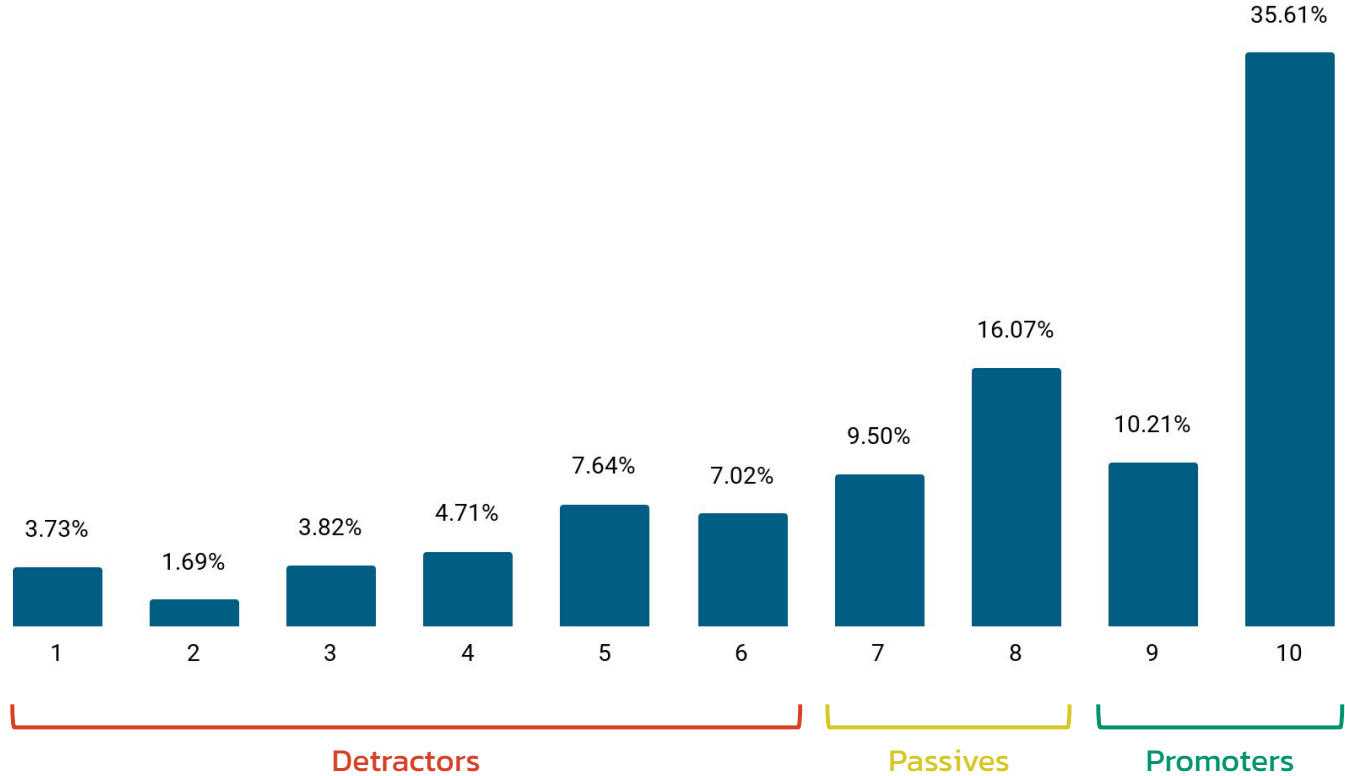
Living in Manassas



Brand Barometer

On a scale of 1 to 10, with 1 being "not at all likely" and 10 being "extremely likely," how likely would you be to recommend...

Visiting Manassas

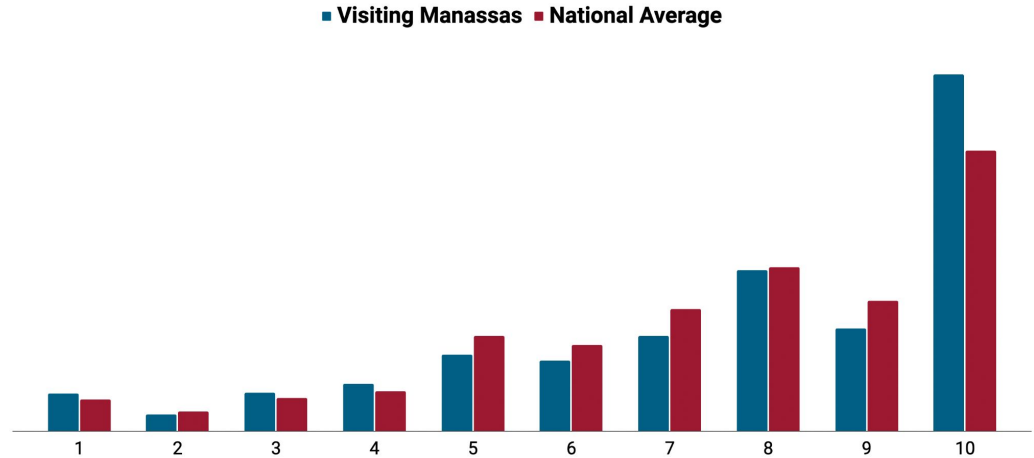


Brand Barometer

On a scale of 1 to 10, with 1 being “not at all likely” and 10 being “extremely likely,” how likely would you be to recommend...

Visiting Manassas

	Visiting Manassas	Manassas Totals	National Average	National Totals
1	3.73%	Detractors 28.61%	3.14%	Detractors 30.47%
2	1.69%		1.96%	
3	3.82%		3.31%	
4	4.71%		4.00%	
5	7.64%		9.47%	
6	7.02%		8.59%	
7	9.50%	Passives	12.18%	Passives
8	16.07%	25.57%	16.33%	28.51%
9	10.21%	Promoters	12.98%	Promoters
10	35.61%	45.82%	28.04%	41.02%



Brand Barometer

On a scale of 1 to 10, with 1 being "not at all likely" and 10 being "extremely likely," how likely would you be to recommend...

Visiting Manassas

17.21%

Overall Brand Advocacy Score
Visiting Manassas

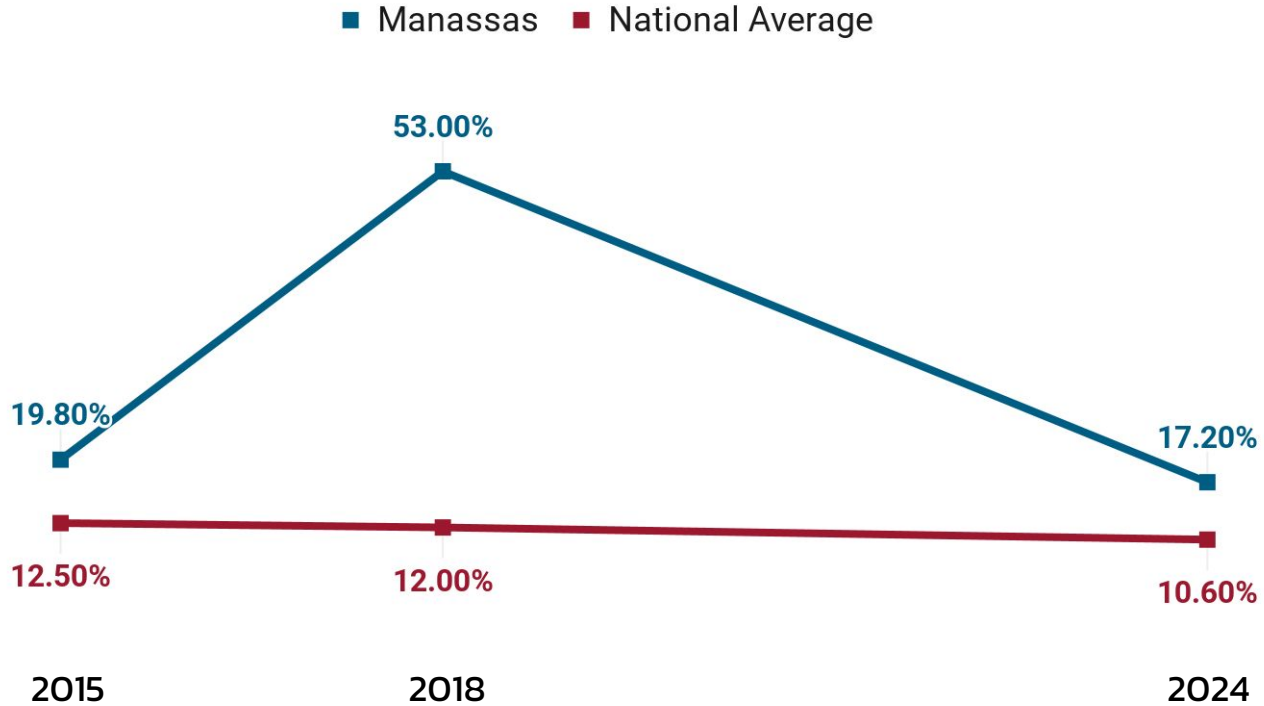
(% of Promoters minus % of Detractors)

Brand Barometer

By Survey Year

On a scale of 1 to 10, with 1 being "not at all likely" and 10 being "extremely likely," how likely would you be to recommend...

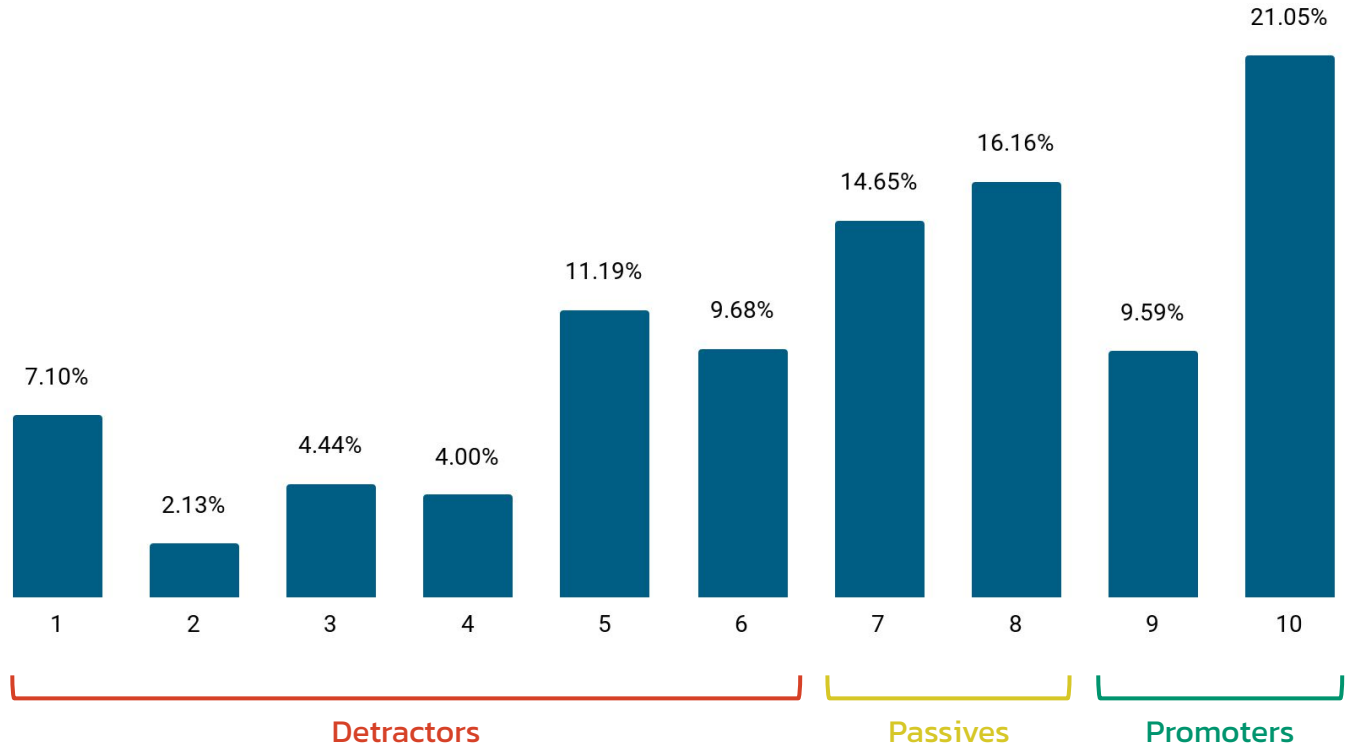
Visiting Manassas



Brand Barometer

On a scale of 1 to 10, with 1 being "not at all likely" and 10 being "extremely likely," how likely would you be to recommend...

Conducting Business in Manassas

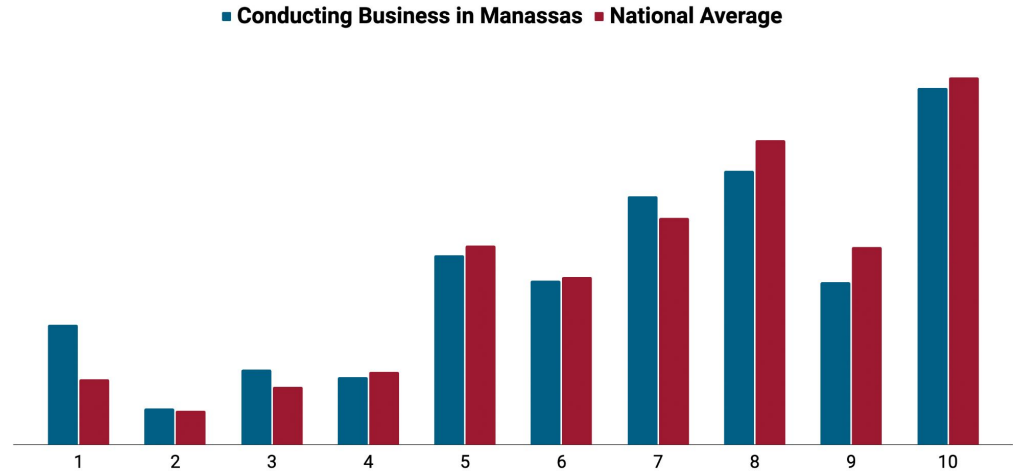


Brand Barometer

On a scale of 1 to 10, with 1 being “not at all likely” and 10 being “extremely likely,” how likely would you be to recommend...

Conducting Business in Manassas

	Biz. in Manassas	Manassas Totals	National Average	National Totals
1	7.10%	Detractors 38.54%	3.86%	Detractors 35.25%
2	2.13%		2.02%	
3	4.44%		3.43%	
4	4.00%		4.29%	
5	11.19%		11.77%	
6	9.68%		9.88%	
7	14.65%	Passives	13.40%	Passives
8	16.16%	30.81%	17.97%	31.37%
9	9.59%	Promoters	11.68%	Promoters
10	21.05%	30.64%	21.69%	33.38%



Brand Barometer

On a scale of 1 to 10, with 1 being "not at all likely" and 10 being "extremely likely," how likely would you be to recommend...

Conducting Business in Manassas

-7.90%

Overall Brand Advocacy Score
Conducting Business in Manassas

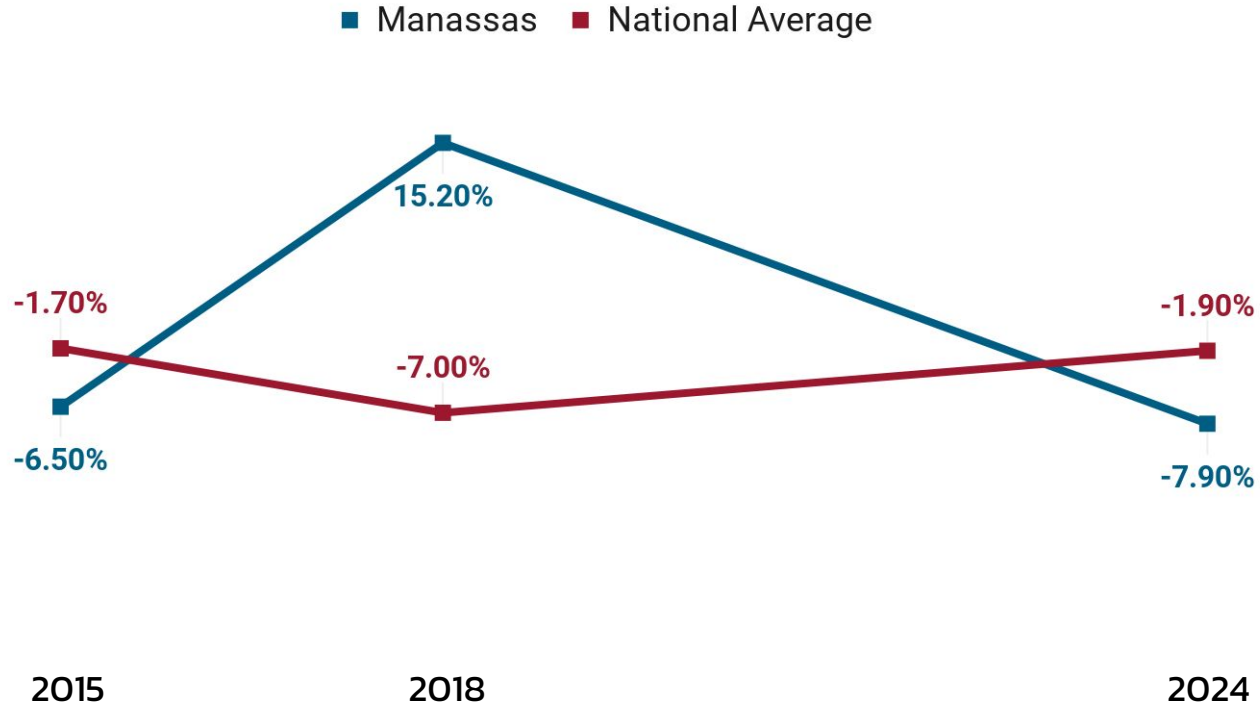
(% of Promoters minus % of Detractors)

Brand Barometer

By Survey Year

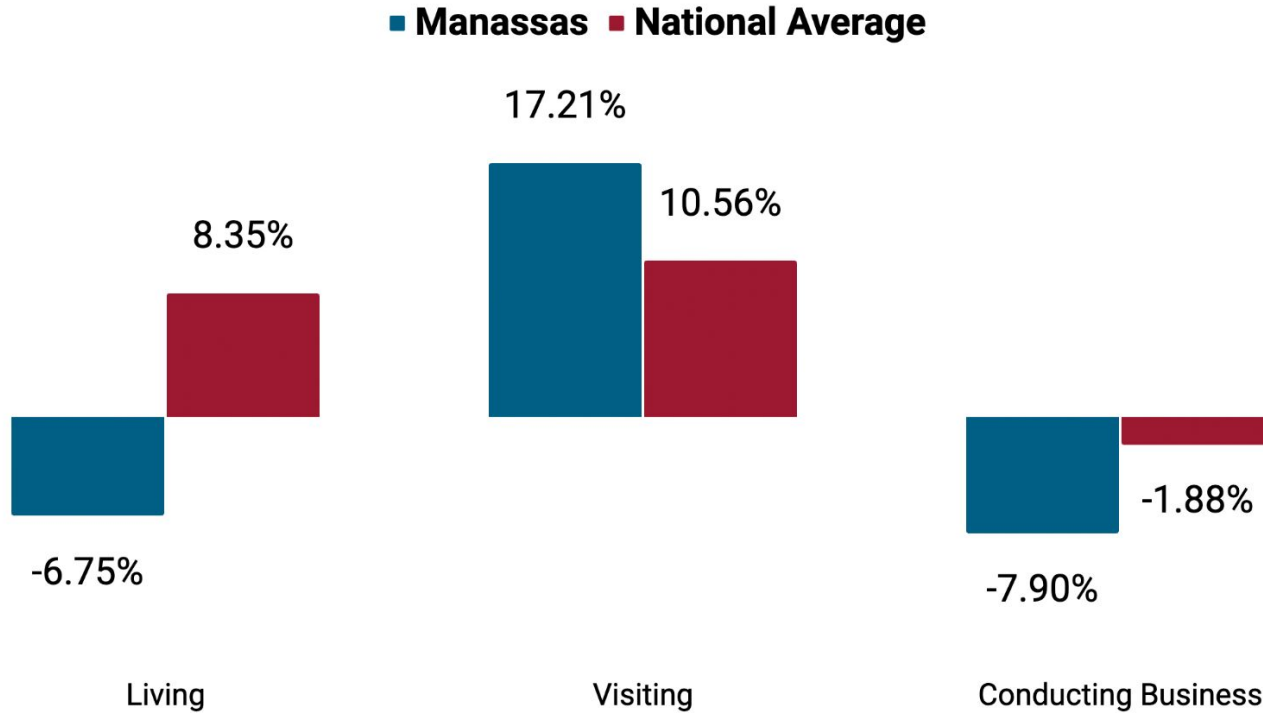
On a scale of 1 to 10, with 1 being "not at all likely" and 10 being "extremely likely," how likely would you be to recommend...

Conducting Business in Manassas



Brand Barometer

On a scale of 1 to 10, with 1 being "not at all likely" and 10 being "extremely likely," how likely would you be to recommend Manassas to a friend or colleague...



Brand Barometer

Resident Advocacy By Survey Year

	Manassas 2015 ¹	Manassas 2018 ²	Manassas 2024	Nat'l. Avg. 2015 ¹	Nat'l. Avg. 2018 ²	Nat'l. Avg. 2024
Living	-15.3%	11.8% $\Delta^1 +27.1\%$	-6.8% $\Delta^1 +8.5\%$ $\Delta^2 -18.6\%$	12.5%	1.1% $\Delta^1 -11.4\%$	8.4% $\Delta^1 -4.1\%$ $\Delta^2 +7.3\%$
Visiting	19.8%	53.0% $\Delta^1 +33.2\%$	17.2% $\Delta^1 -2.6\%$ $\Delta^2 -35.8\%$	12.5%	12.0% $\Delta^1 -0.5\%$	10.6% $\Delta^1 -1.9\%$ $\Delta^2 -1.4\%$
Conducting Business	-6.5%	15.2% $\Delta^1 +21.7\%$	-7.9% $\Delta^1 -1.4\%$ $\Delta^2 -23.1\%$	-1.7%	-7.0% $\Delta^1 -5.3\%$	-1.9% $\Delta^1 -0.2\%$ $\Delta^2 +5.1\%$

Brand Barometer

KEY FINDINGS

There is clear regression from the highs of the 2018 Brand Barometer measurement. However, the updated measurements for 2024 appear consistent with the original scores from 2015, and they reflect current patterns of advocacy within mid-size communities that make up North Star's client base.

While all are speculative, possible explanations for the drastic changes across survey years include:

- The City of Manassas invested heavily in branding and marketing after 2015, creating significant goodwill across the community and rewarded by a big spike in Brand Barometer scores.
- The 2018 measurement relied on a sample in which strong advocates were overrepresented. Meanwhile, the 2024 survey responses showed a contingent (about 150–200 respondents) of Manassas residents who were comfortable offering negative feedback and criticism.
- In terms of politics and current events, the year 2024 may be more akin to 2015 than 2018. North Star's research has identified a strong correlation between the post-2020 state of the country and decreased resident advocacy in cities from coast to coast.
- The 2018 measurement may be the outlier. As the City of Manassas continues to monitor resident sentiment, future Brand Barometer measurements may show that 2018 yielded results above the expected level of advocacy across the community.

Community Survey

Community Survey

OVERVIEW

Purpose

The purpose of the Online Community Survey is to gain a quantitative measure of the community's perceptions of Manassas.

Methodology + Results

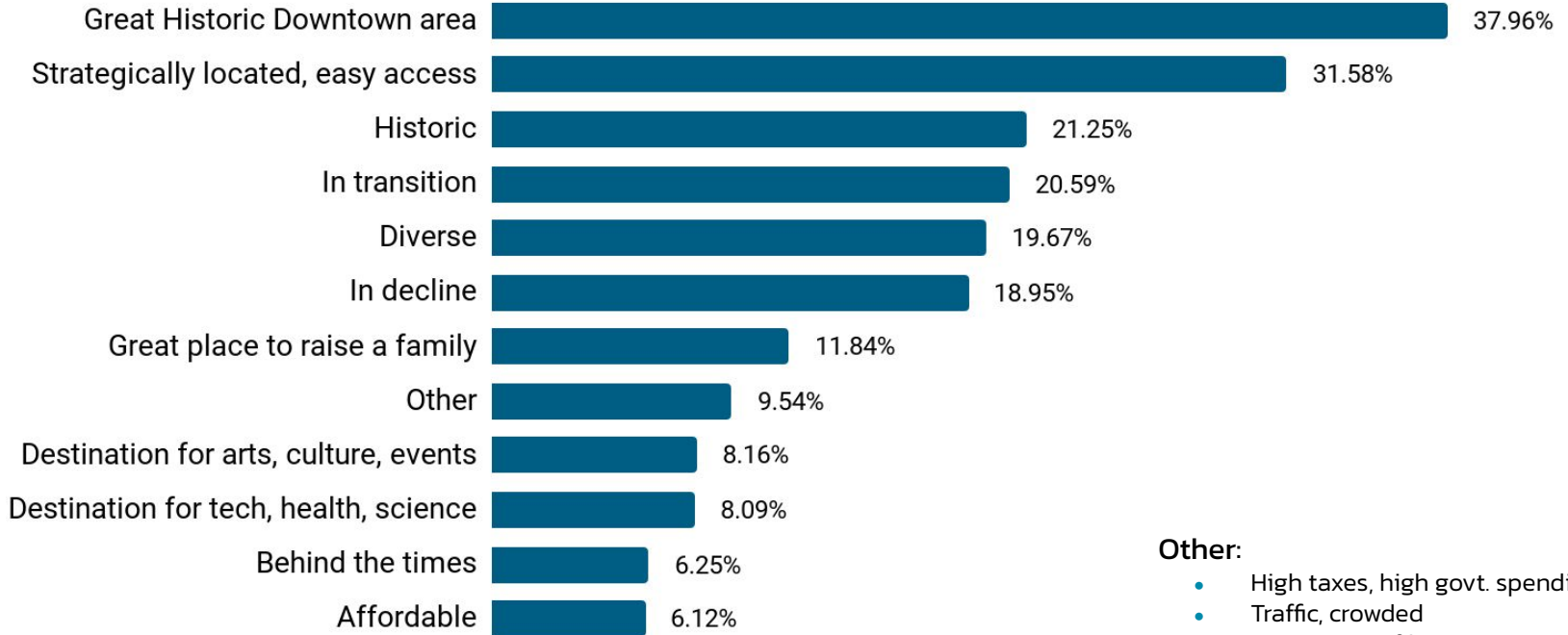
North Star developed an online survey informed by an earlier version of the survey conducted in 2015 as well as current objectives for the Department of Economic Development. Most questions were multiple choice, allowing for a quantitative measure of resident perceptions. Community members were encouraged to participate after the survey was posted online and publicized in local media.

1,520 survey responses were collected for this survey, allowing for a Margin of Error of **±2.51%** at the **95%** confidence level. **220** of the responses were completed using the Spanish-language version of the survey.

Please refer to **Appendix A** on the Google Drive for the complete Online Community Survey results.

Community Survey

Which of the following words or phrases best describe the City of Manassas?
Choose two answers.



Other:

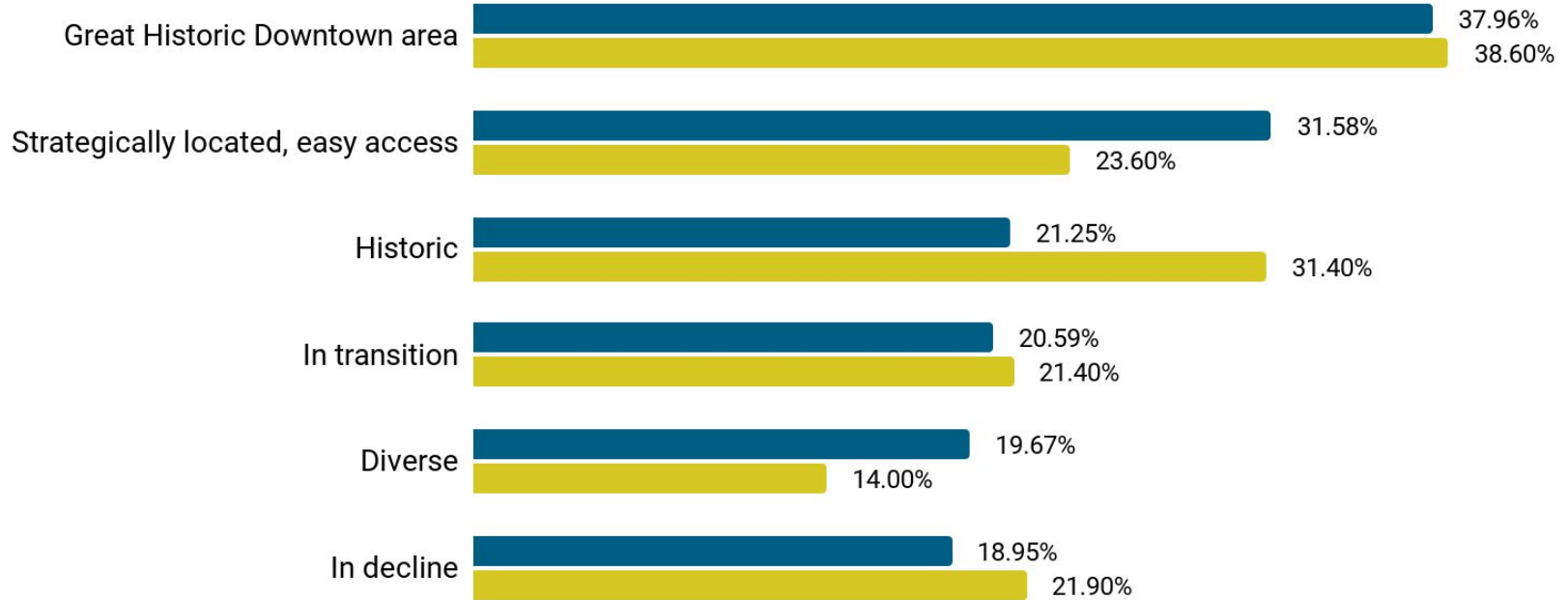
- High taxes, high gov. spending
- Traffic, crowded
- Rising cost of living
- Overdevelopment, gentrification
- Lacks curb appeal

Community Survey

By Survey Year, Top Ranked

Which of the following words or phrases best describe the City of Manassas?

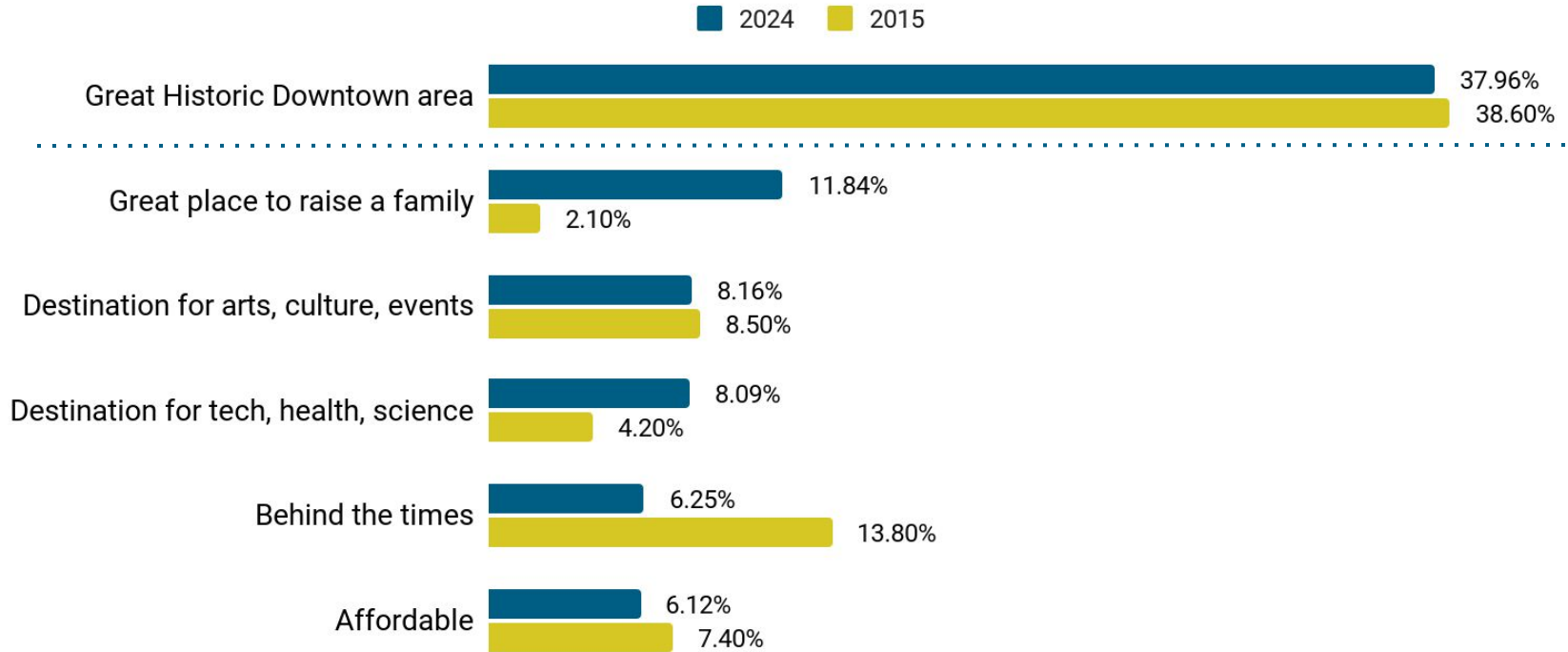
■ 2024 ■ 2015



Community Survey

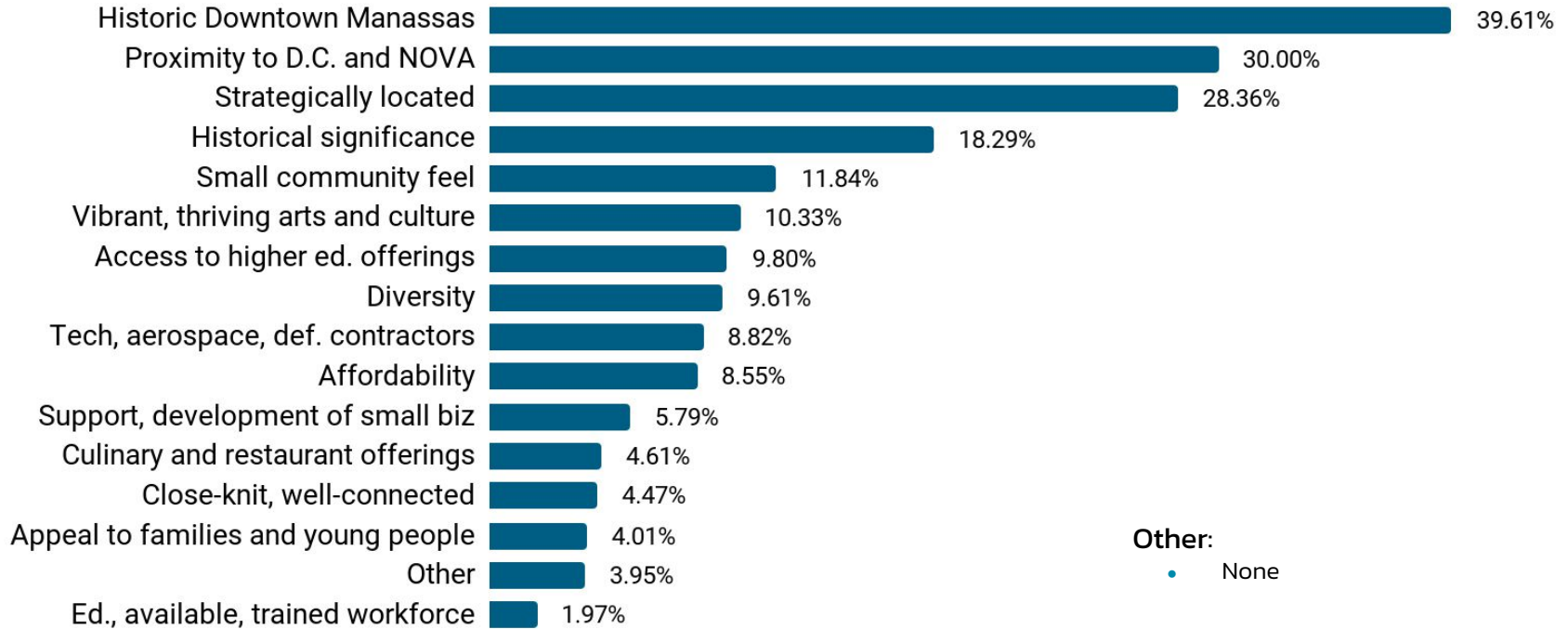
By Survey Year, Bottom Ranked

Which of the following words or phrases best describe the City of Manassas?



Community Survey

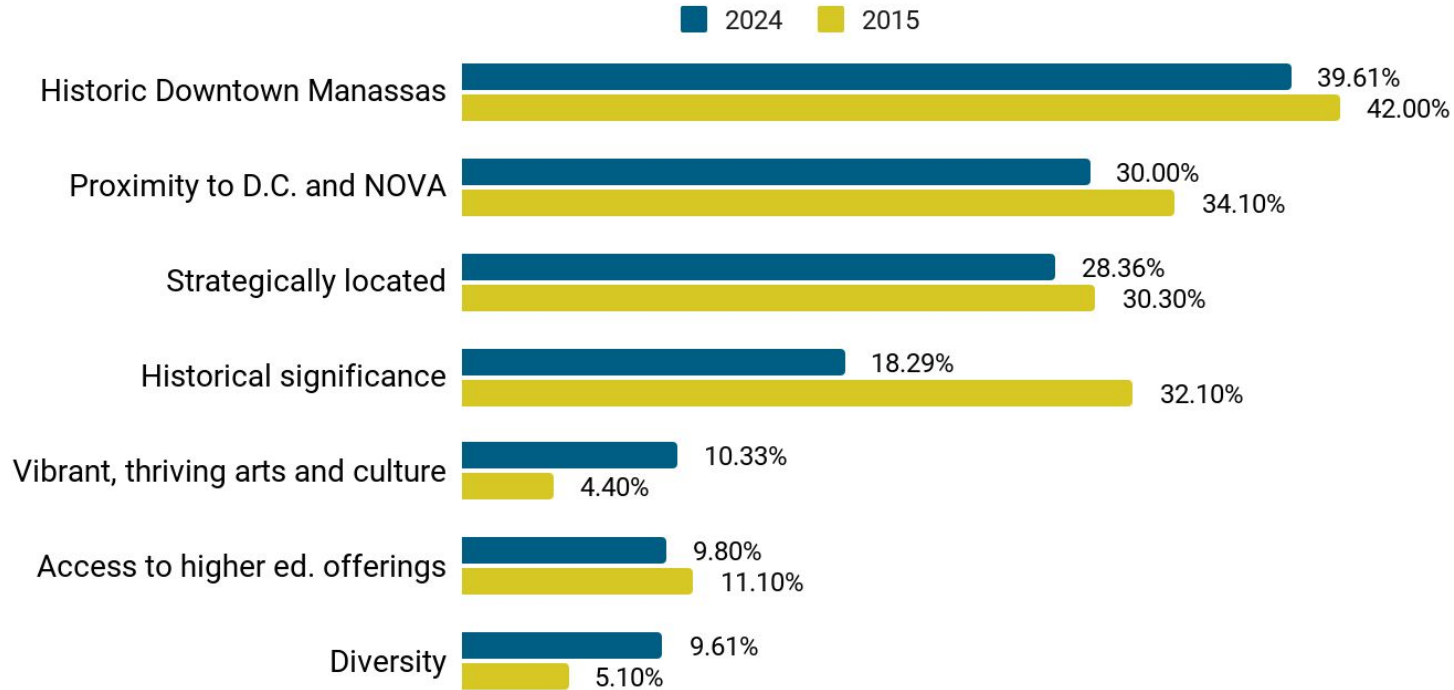
What are the City of Manassas' greatest strengths?
Choose two answers.



Community Survey

By Survey Year, Top Ranked

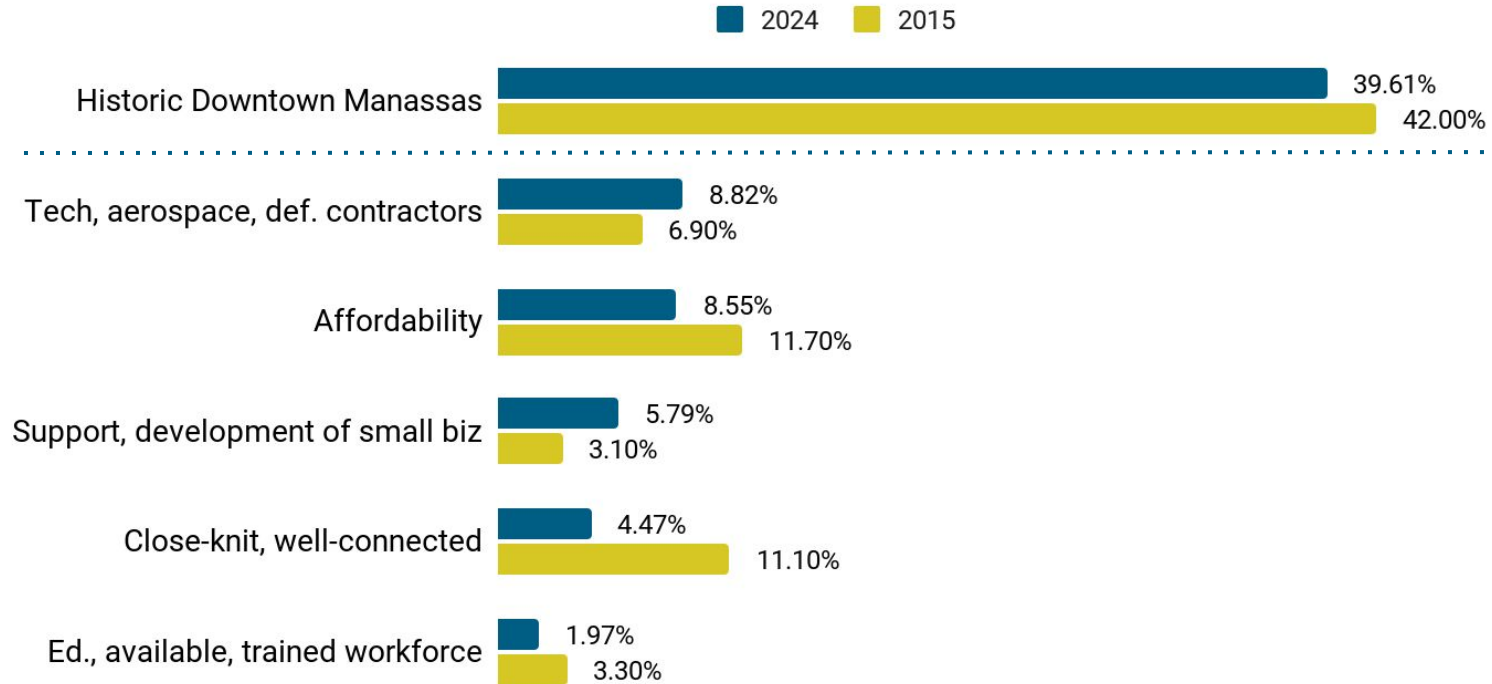
What are the City of Manassas' greatest strengths?



Community Survey

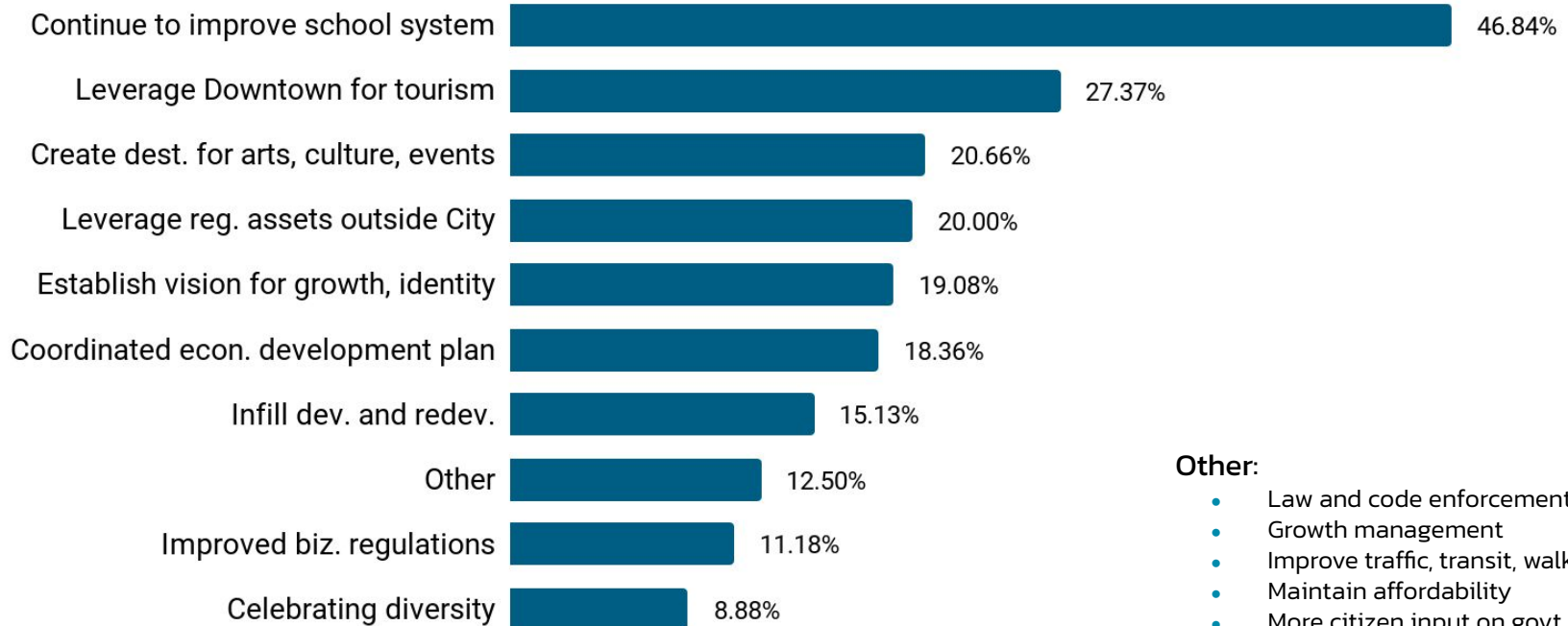
By Survey Year, Bottom Ranked

What are the City of Manassas' greatest strengths?



Community Survey

What is the City of Manassas' greatest opportunity for growth?
Choose two answers.



Other:

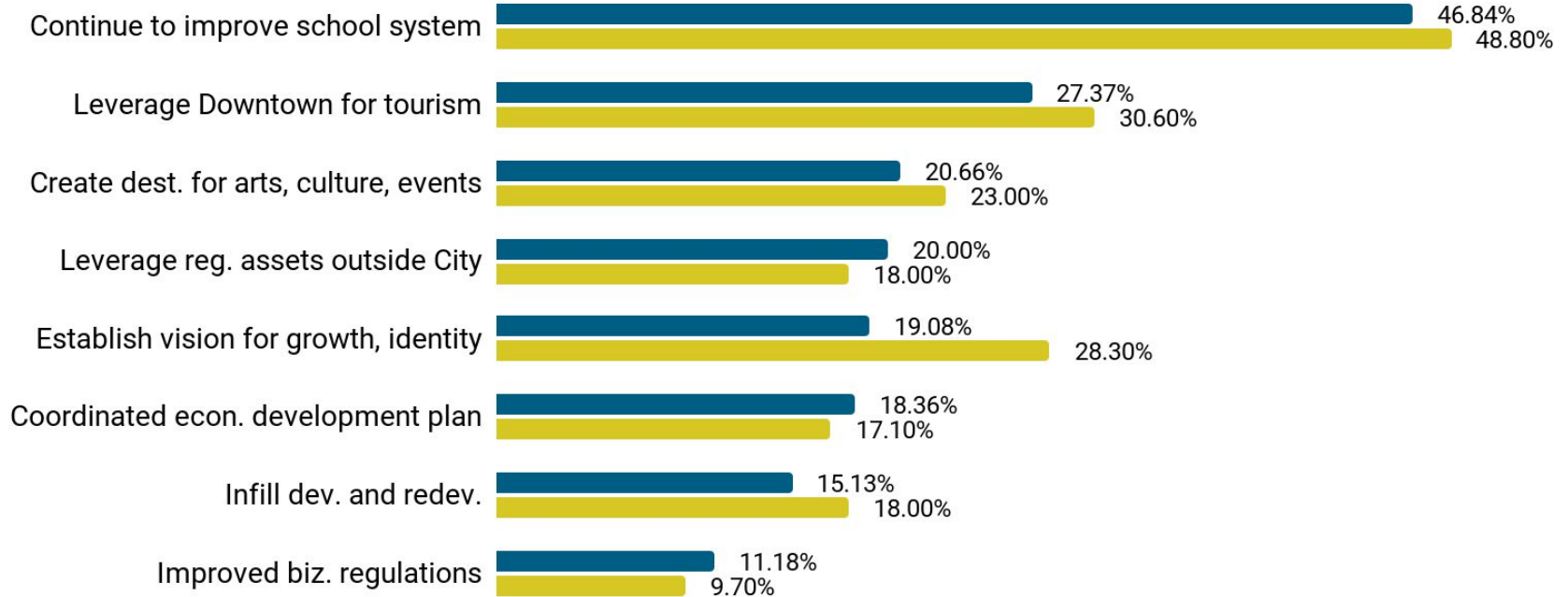
- Law and code enforcement
- Growth management
- Improve traffic, transit, walkability
- Maintain affordability
- More citizen input on govt. decisions
- Cleanup and beautification
- Support and activities for seniors

Community Survey

By Survey Year

What is the City of Manassas' greatest opportunity for growth?

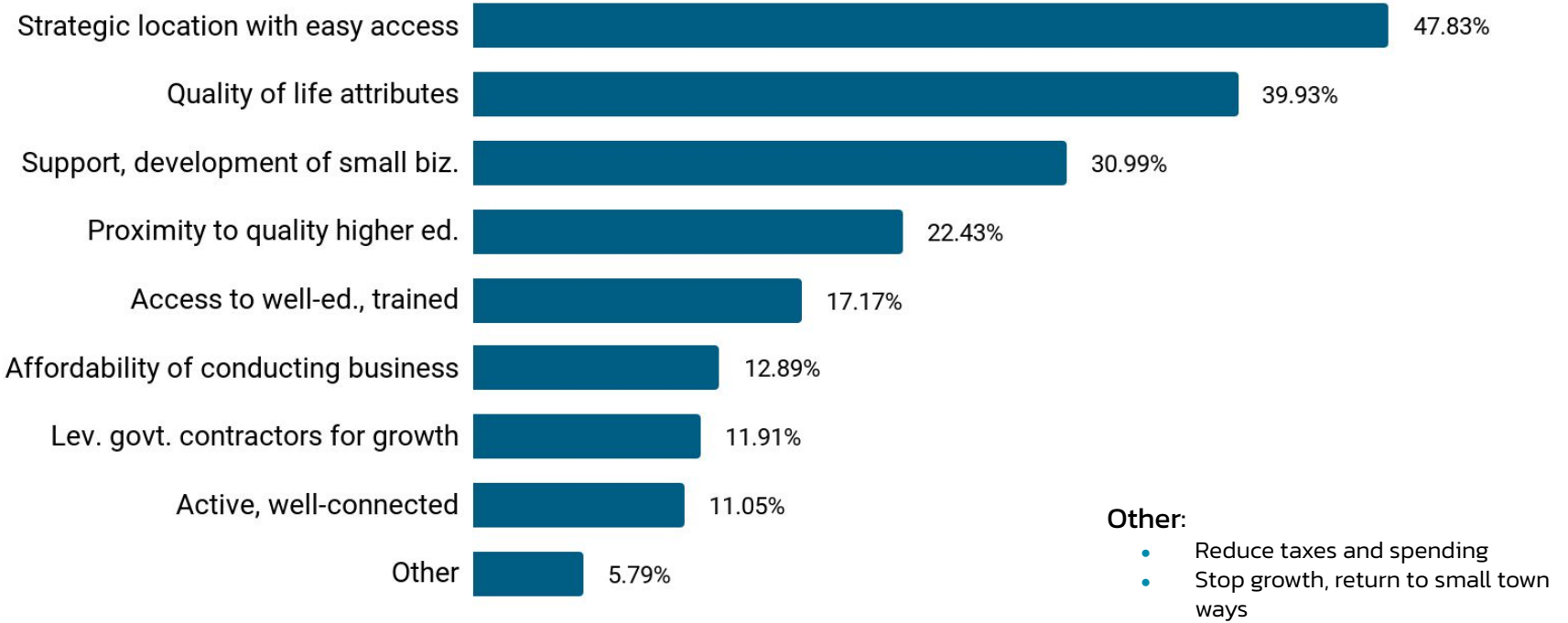
■ 2024 ■ 2015



Community Survey

In your opinion, which of the following attributes of the City of Manassas business community is the most compelling strength to encourage future growth and economic development?

Choose two answers.

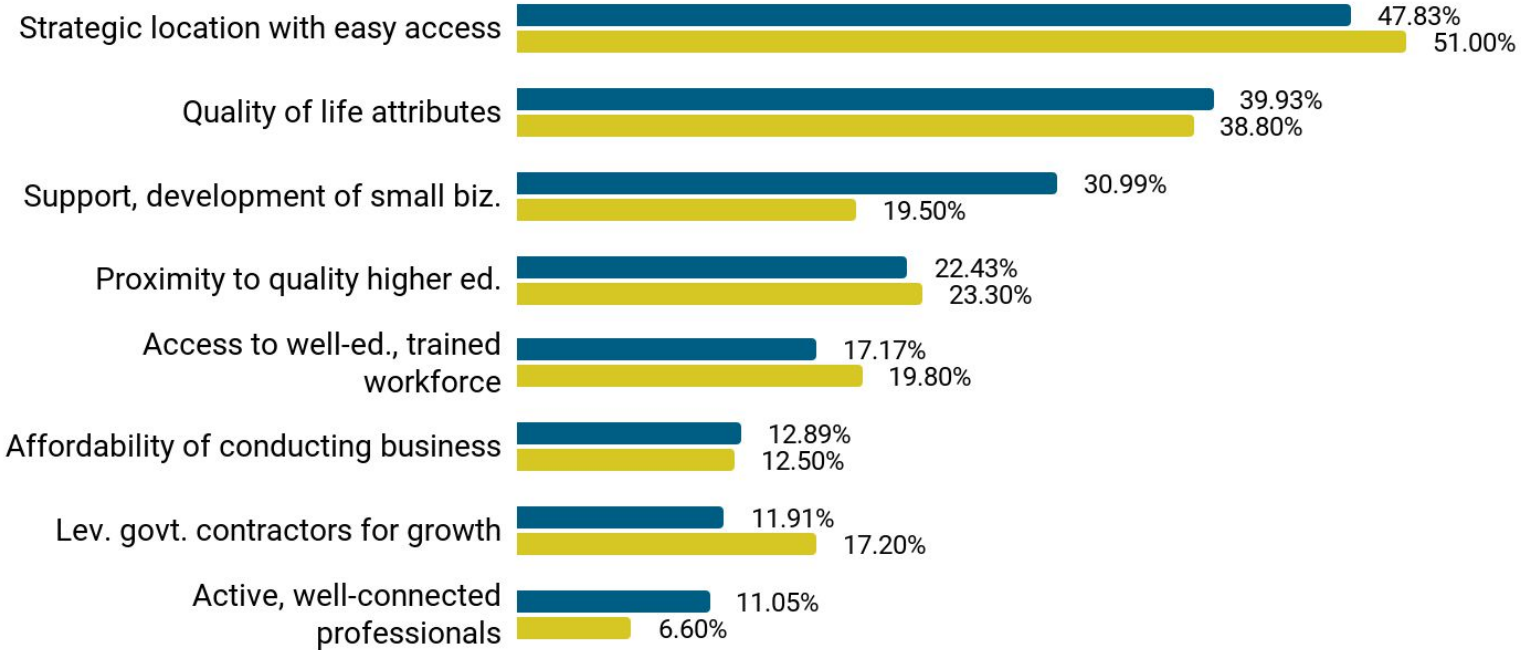


Community Survey

By Survey Year

In your opinion, which of the following attributes of the City of Manassas business community is the most compelling strength to encourage future growth and economic development?

■ 2024 ■ 2015

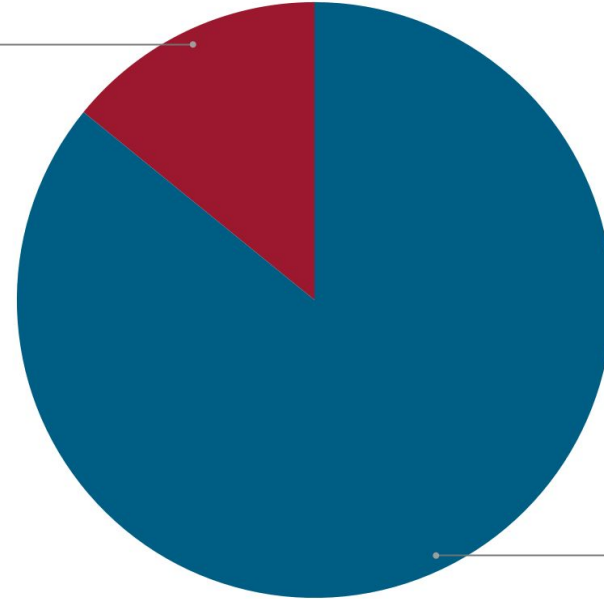


Community Survey

Have you seen this brand previously?



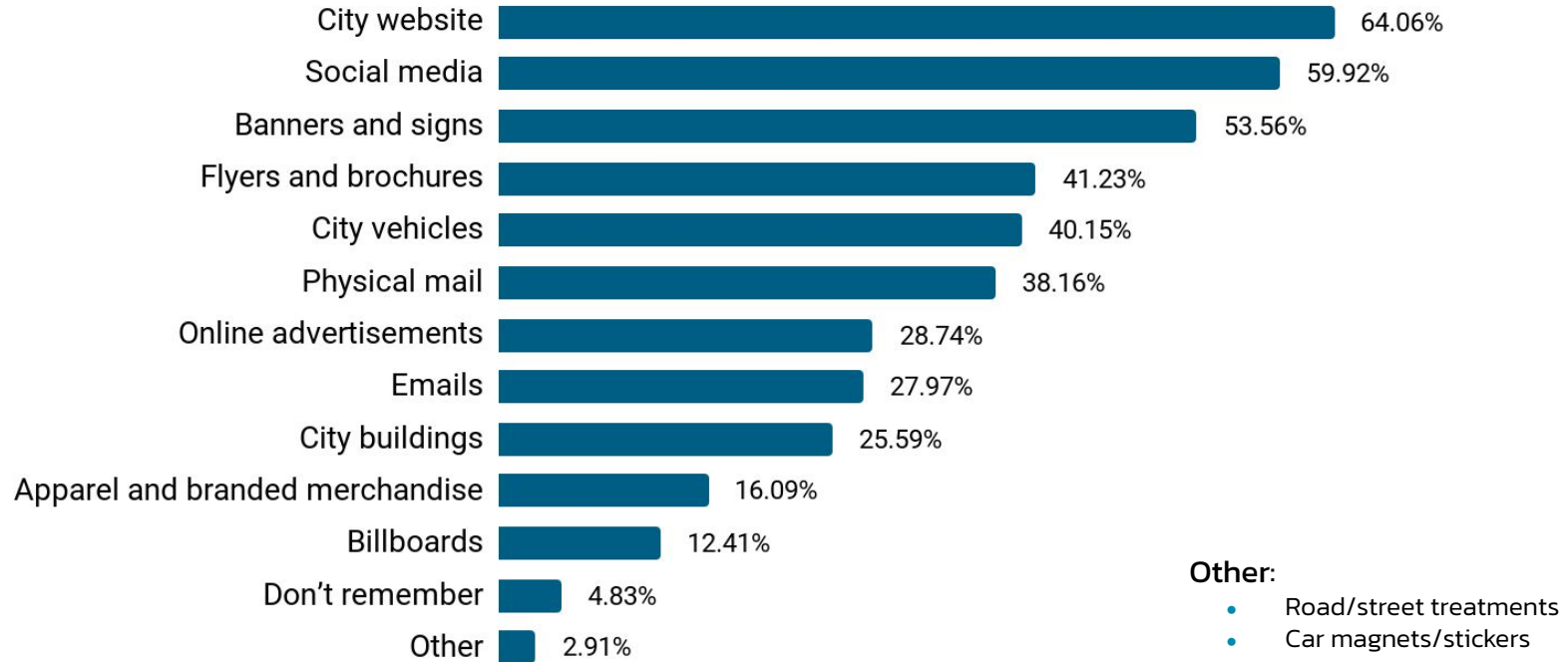
No
14.1%



Yes
85.9%

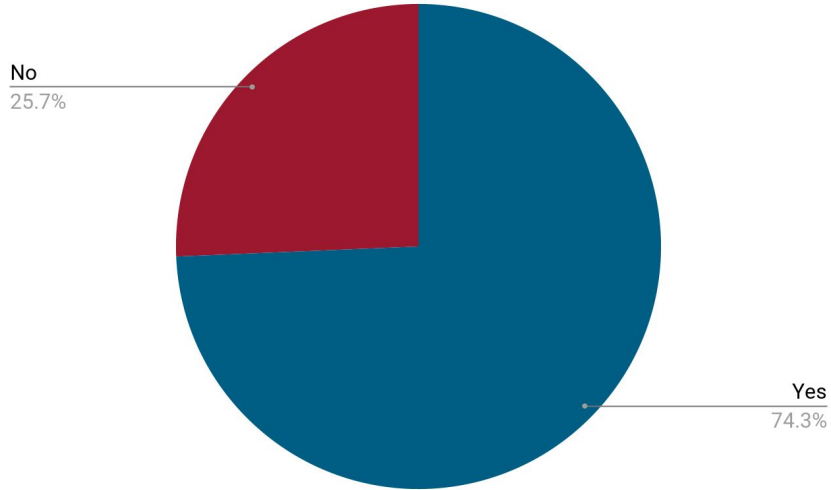
Community Survey

Where have you seen this brand?
Choose all that apply.



Community Survey

Do you think that the logo accurately represents what is special about the City of Manassas?



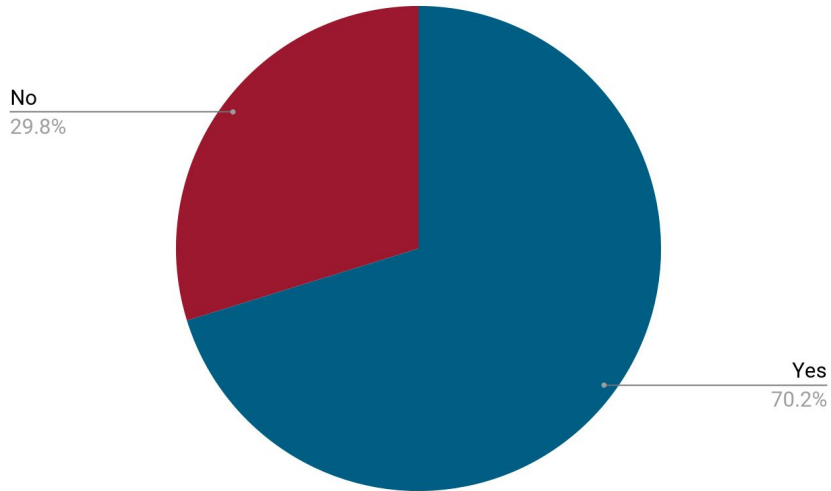
Please explain your answer in a few words:

- "The profile of city hall and the train station are iconic."
- "The city is known for its history and in recent years has been revived by rebuilding Old Town, the farmers market, First Fridays and several other events held in town."
- "History is so important to this region. We need to acknowledge and learn from our history while we live in our modern tech region."
- "It's to the point. It isn't overbearing or hard to understand. The train could be a bit more defined."
- "It's missing any recognizable indication of the 2 famous battles that took place here during the Civil War."
- "People outside of Manassas may not understand the relationship of the logo to the slogan."
- "It ties the historic aspects via train/city hall—maybe the modern aspect could be implemented in a better way other than just wording."

Community Survey

Do you think that the strapline “Historic Heart. Modern Beat.” accurately represents what is special about the City of Manassas?

Please explain your answer in a few words:

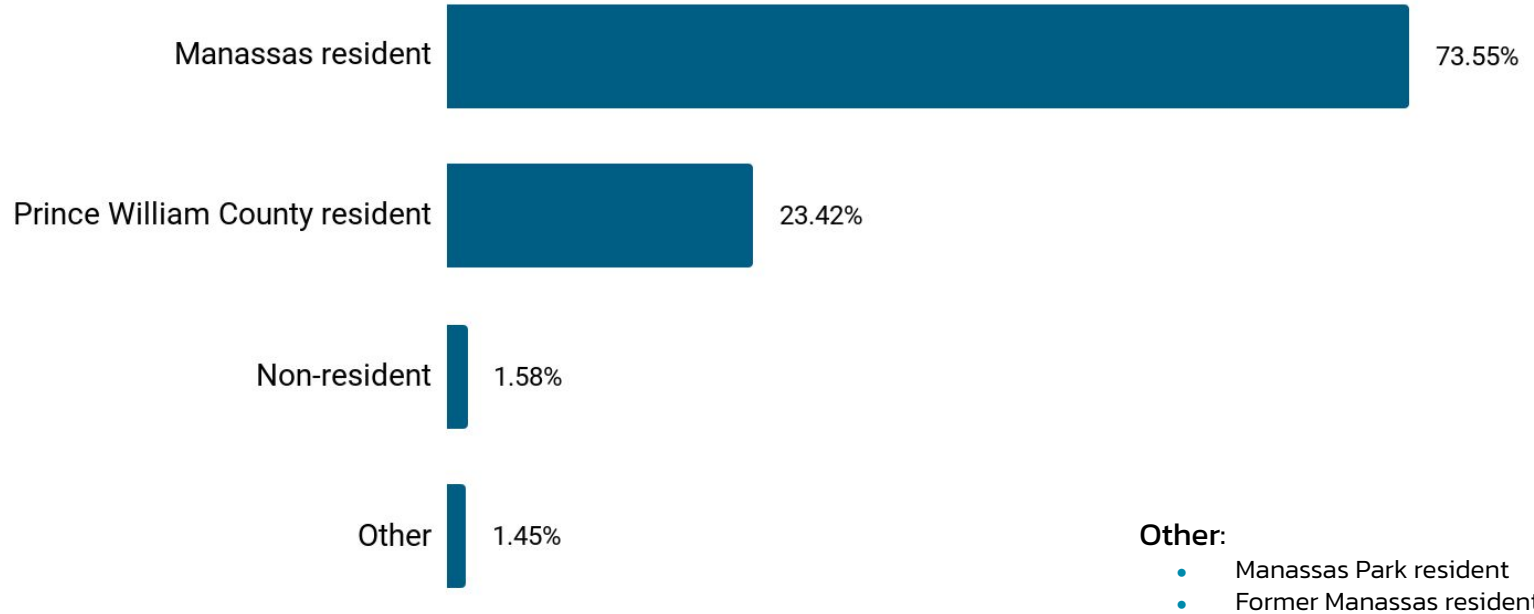


- “Most people recognize the name from the Civil War battles, but GMU and tech keep Manassas going.”
- “Modernization to density-focused orientation is the way forward. There’s a reason people love historic Old Town: it’s dense and walkable.”
- “Captures the city and surrounding areas well. If anything, it will capture it even better with improvements I know are occurring.”
- “I don’t think Manassas is very modern-feeling. What stands out to me more is its vibrant community and variety of social and cultural events around town.”
- “Doesn’t show the diversity of cultures that is Manassas”
- “The tagline doesn’t roll off the tongue easily, so it won’t get stuck in your head.”
- “Manassas does have an historic area. It also has modern problems.”

Demographics

Community Survey

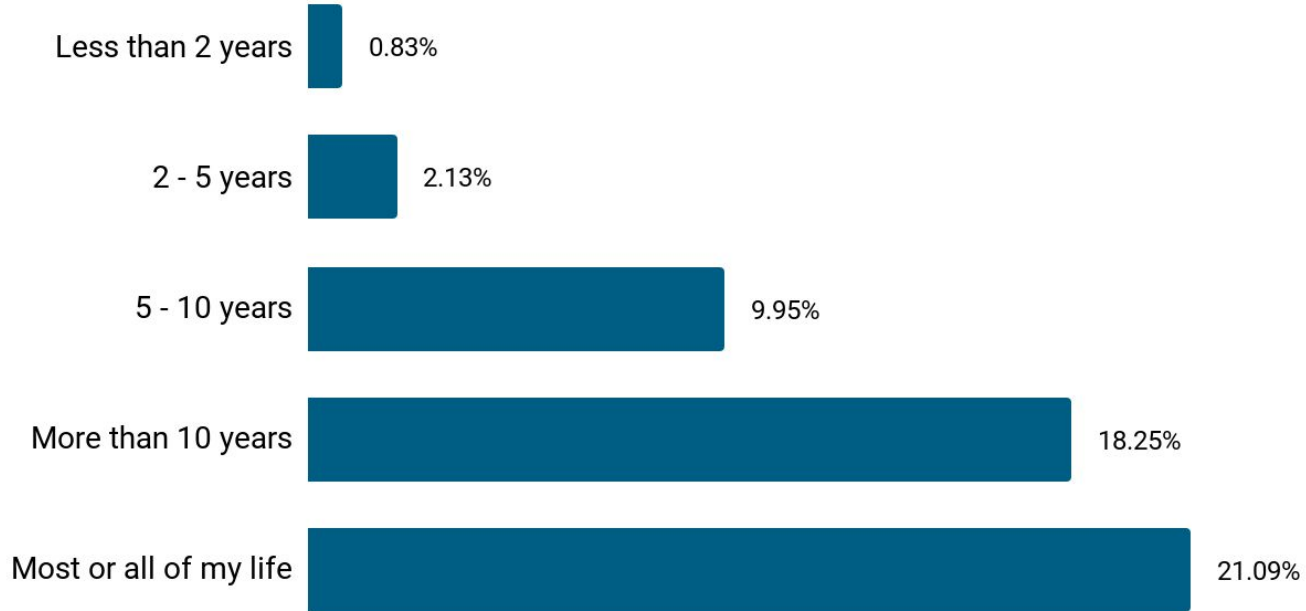
Mark the answer that best describes you.



Community Survey

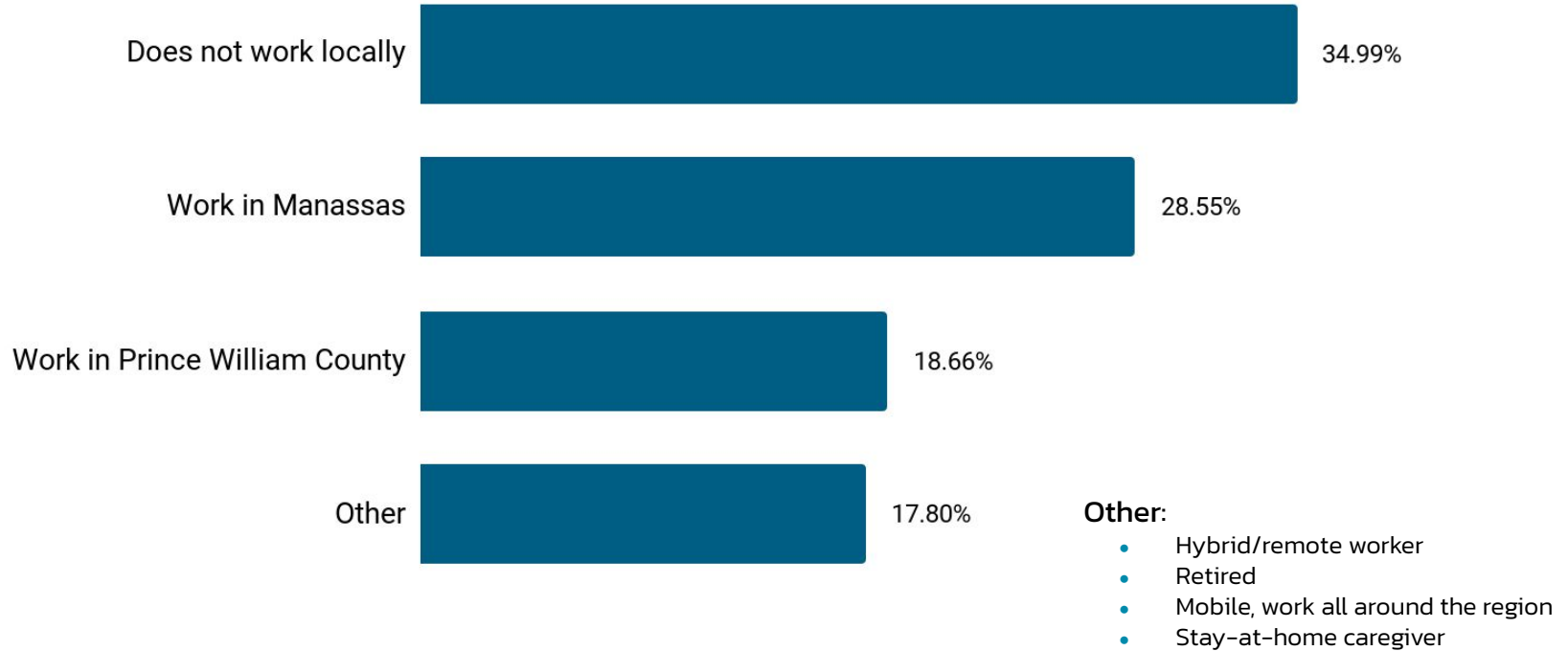
Residents Only

How long have you been a resident of Manassas?



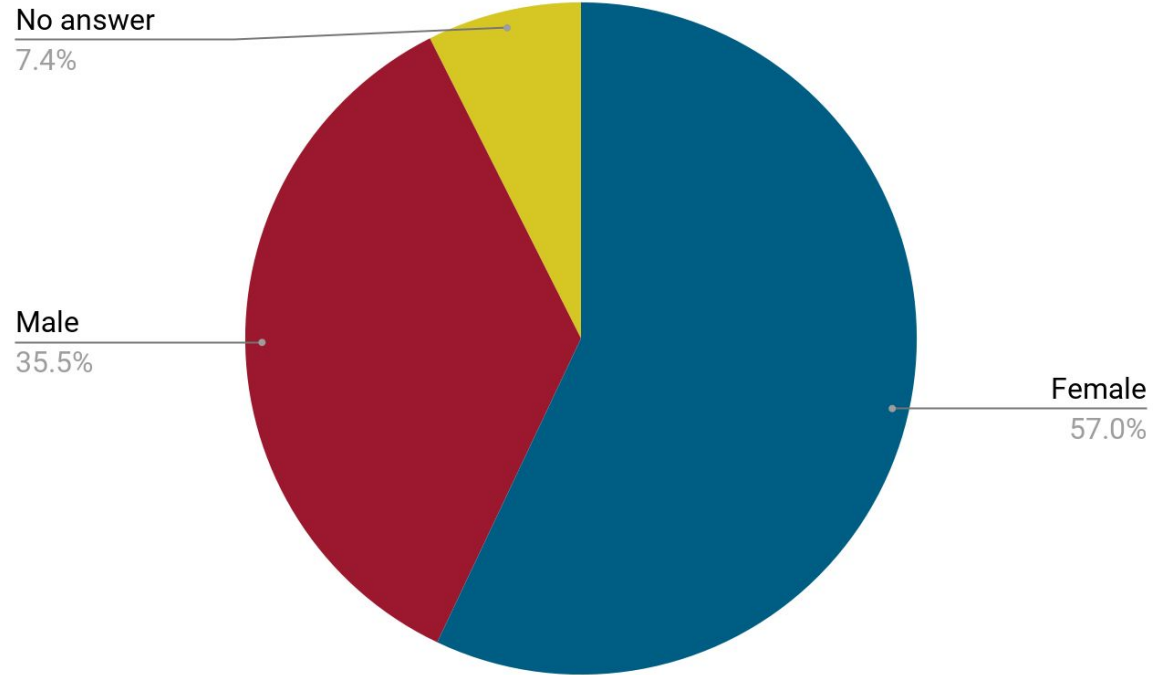
Community Survey

Mark the answer that best describes you.



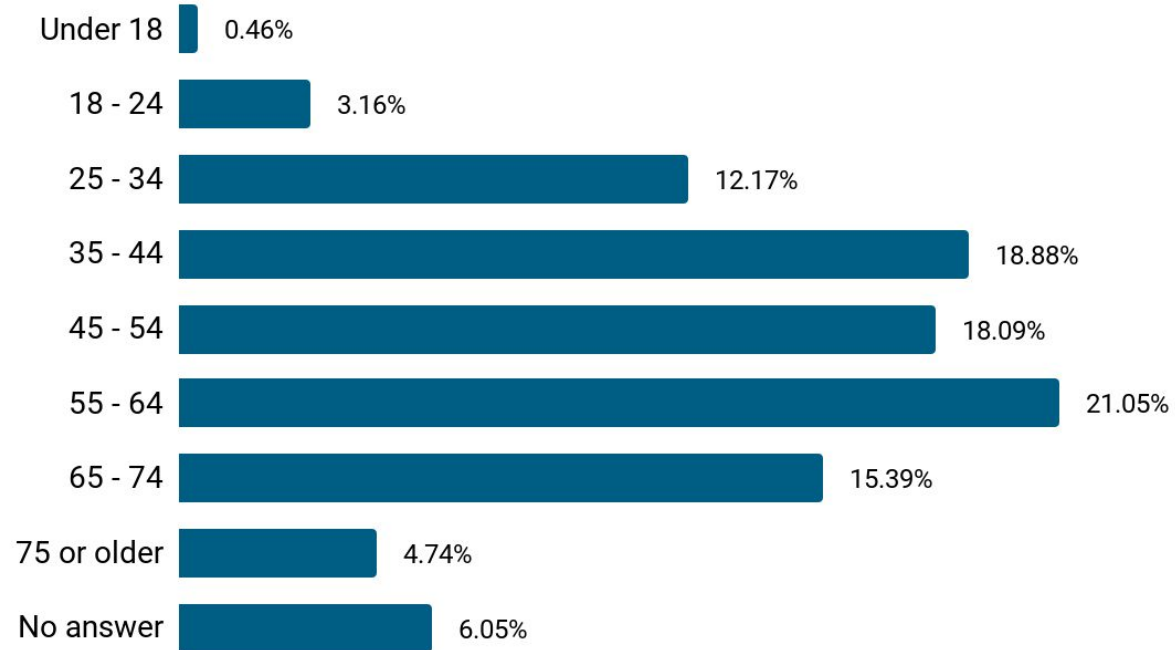
Community Survey

What is your gender?



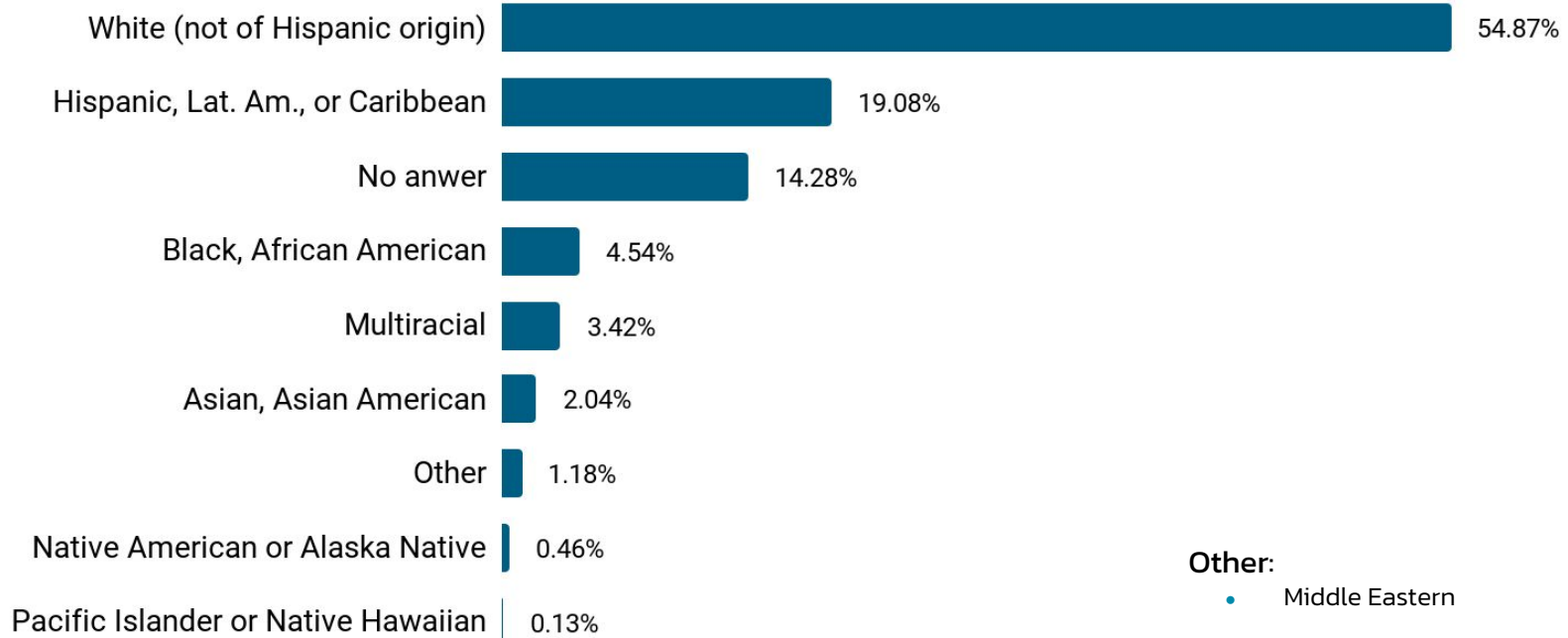
Community Survey

Which of the following includes your age?



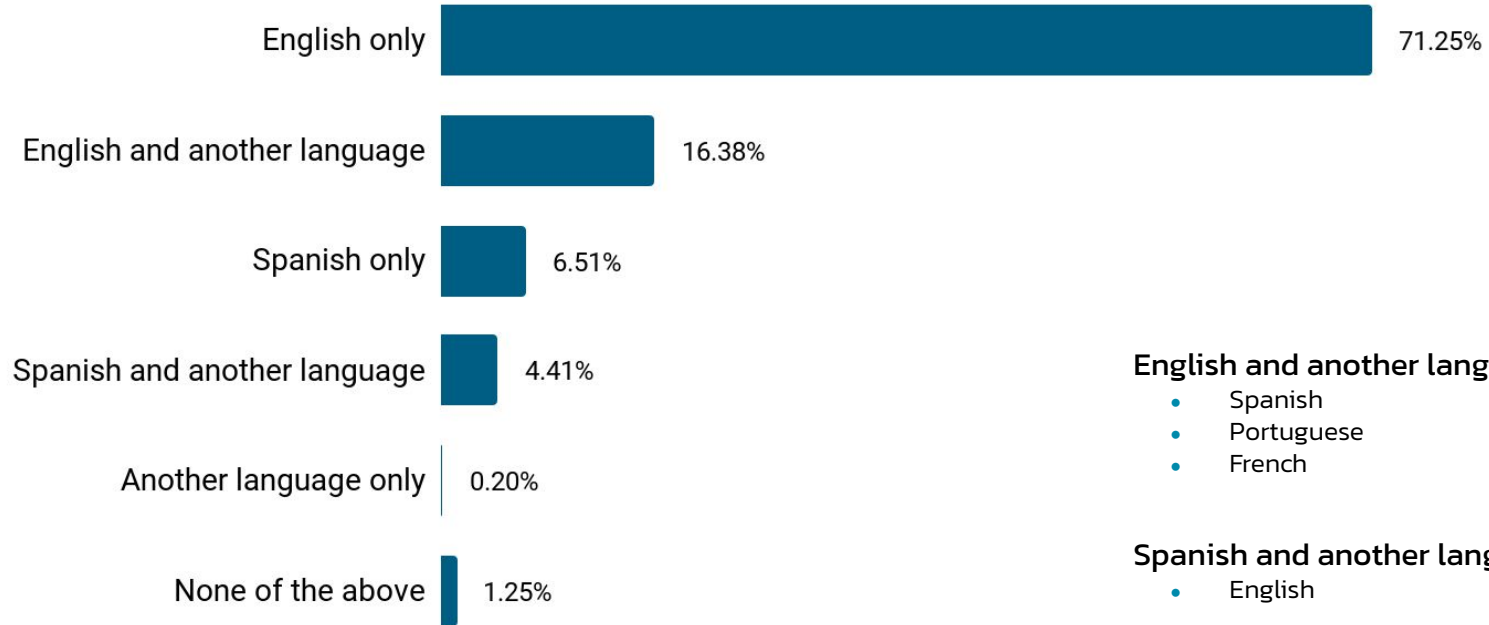
Community Survey

Which of the following best describes you?



Community Survey

Which of the following best describes the language(s) that you use at home?



Community Survey

KEY FINDINGS

The 2024 Community Survey was a success in terms of the number of people who completed the survey: 1,118 residents of the City of Manassas and 1,520 people in total. Additionally, nearly twenty percent of survey takers selected Hispanic, Latin American, or Caribbean as their background, making for a more diverse and representative sample.

Despite almost a decade between the 2015 and 2024 surveys, the updated quantitative results were remarkably consistent with established benchmarks. Year-over-year comparison graphs show the same preferences, often within ten percentage points.

When asked about the City of Manassas brand, respondents largely had a positive association with both the logo and the strapline. The symbols and sentiment of the brand clearly resonate with the community and the region, meaning that only minor updates would be advisable at this moment.

Though North Star does not advise over-surveying residents, many of the open-ended comments indicated a willingness to provide opinions and criticisms to the City, if only they were asked. Manassas residents may welcome other ways of getting involved in the community and its development.

Consumer Awareness & Perception Study

Consumer Awareness and Perception Study

OVERVIEW

Purpose

The purpose of this study is to gain insight into consumer awareness, visitation, and perceptions of Manassas. The survey measures:

- Overall top-of-mind perceptions of Manassas and immediate competitors
- Consumer visitation trends (frequency and nature of visitation)
- Consumer visitation drivers (business, leisure, friends, and family)
- Strengths and weaknesses of Manassas with identified community attributes
- Measurements of Manassas quality of life indicators
- Measurement of Manassas strengths and weaknesses

Methodology + Results

An Internet study was conducted among respondents in Washington, D.C. and Northern Virginia. A total of **500** surveys were completed and analyzed, allowing for a margin of error **±4.38** at the **95%** confidence level.

Terminating factors included being under 18 and being “Not at all familiar” with Manassas.

Consumer Awareness and Perception Study

OVERVIEW

Methodology + Results (continued)

See **Appendix B** on the Google Drive folder for the complete CAP Study results.

We examined the responses for several questions relative to the particular responses to other questions in this study. This process of cross-tabulation is a type of analysis that looks at the variability of a characteristic between two or more groups. In other words, it compares opinions, behaviors, perceptions, etc. between different types of people (respondents). Cross tabulating data reveals much more detailed information than simply presenting the means, or averages, of an aggregated set of data. We have shared the most compelling cross-tabulations in the following pages. We present the question and responses in aggregate form followed by the detailed cross-tabulations.

Consumer Awareness and Perception Study

SURVEY SAMPLE

500 Total Respondents

- 125 from Prince William County and City of Manassas Park
- 125 from Northern Virginia Inner Suburbs
- 125 from Northern Virginia Outer Suburbs
- 125 from Washington, D.C. and Maryland Suburbs

Terminations included:

- 93 for living outside areas of interest
- 10 for being under 18
- 245 for not being familiar with Manassas

Consumer Awareness and Perception Study

SURVEY SAMPLE COMPARISON

2024 – 500 Total Responses

- 125 from Prince William County and City of Manassas Park
- 125 from Northern Virginia Inner Suburbs
- 125 from Northern Virginia Outer Suburbs
- 125 from Washington, D.C. and Maryland Suburbs

2020 – 221 Total Responses

- 99 from Prince William County
- 122 from the Washington, D.C. MSA: Virginia Region (Northern Virginia Inner Suburbs)

2015 – 241 Total Responses

- 105 from Prince William County
- 136 from the Washington, D.C. MSA: Virginia Region (Northern Virginia Inner Suburbs)

Consumer Awareness and Perception Study

SURVEY ANALYSIS GROUPINGS

Markets

- PWC: *City of Manassas Park + Prince William County*
- Inner Suburbs: *Cities of Alexandria, Fairfax, and Falls Church + Arlington and Fairfax Counties*
- Outer Suburbs: *City of Fredericksburg + Culpeper, Fauquier, Loudoun, Spotsylvania, and Stafford Counties*
- DC + MD: *Washington, D.C. + Frederick, Montgomery, and Prince George's Counties*

Visitors (373 respondents)

- Visitors indicated that they have visited Manassas since 2020.

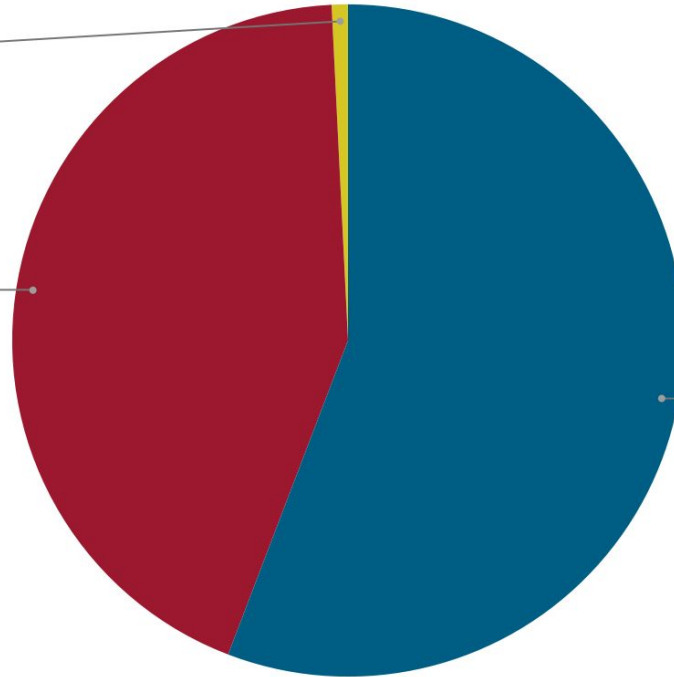
Demographics

What is your gender?

No answer
0.8%

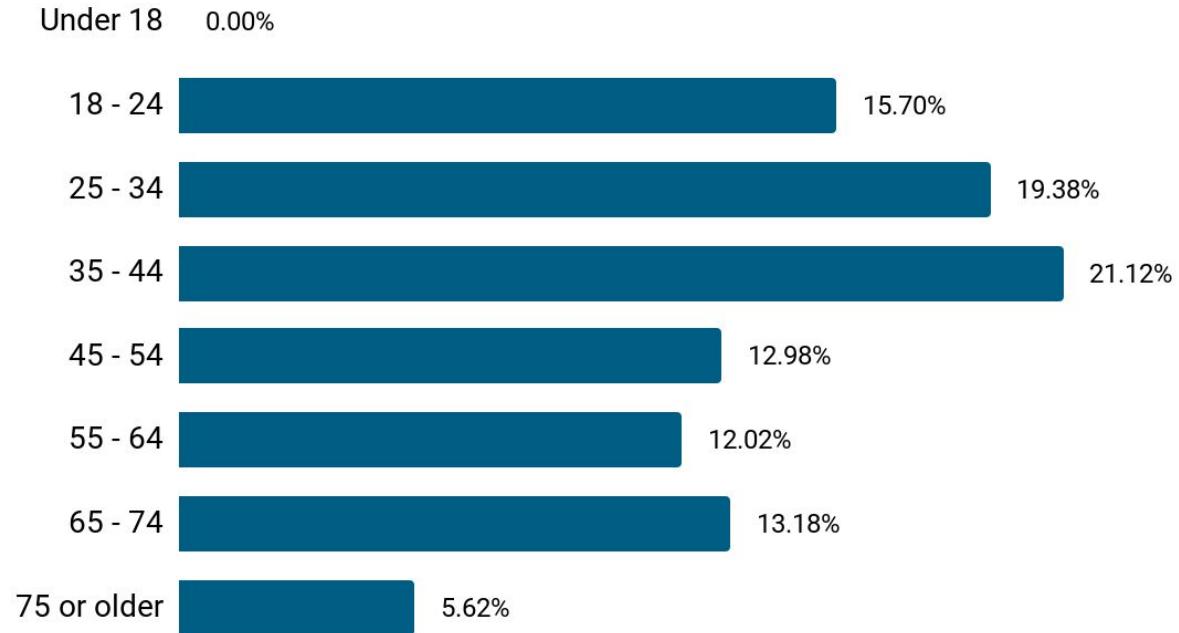
Male
43.4%

Female
55.8%

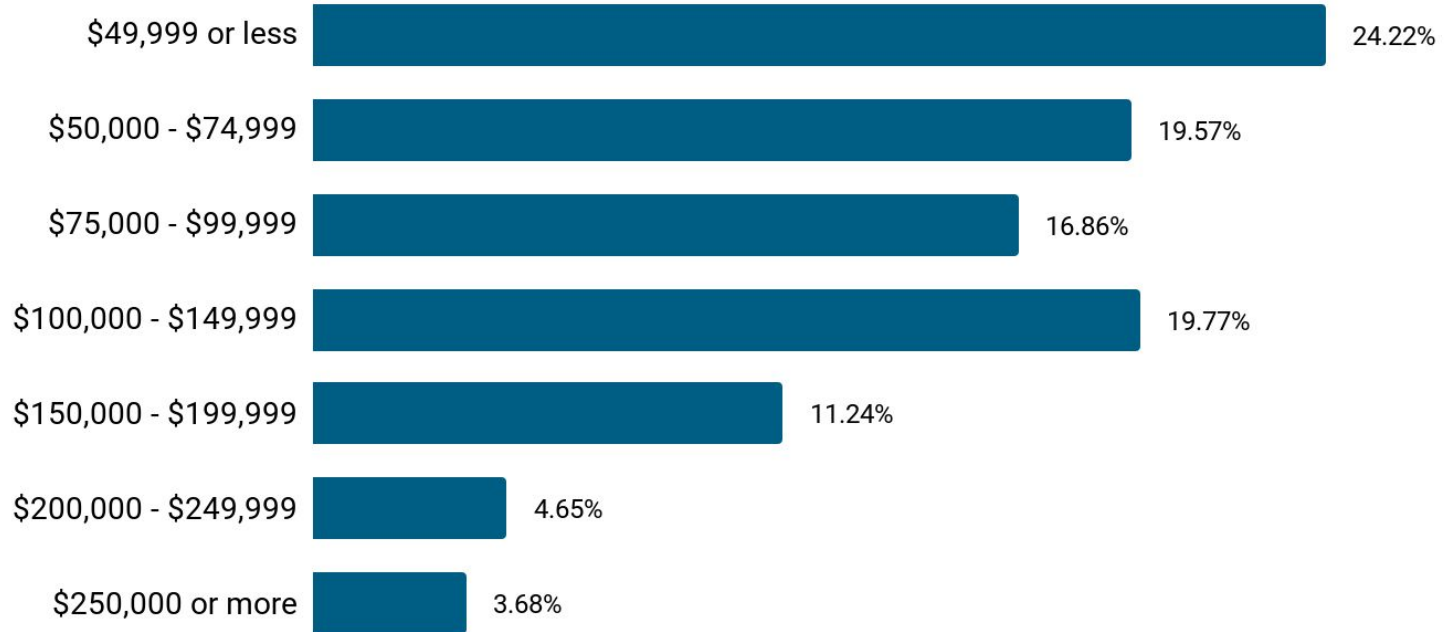


CAP Study

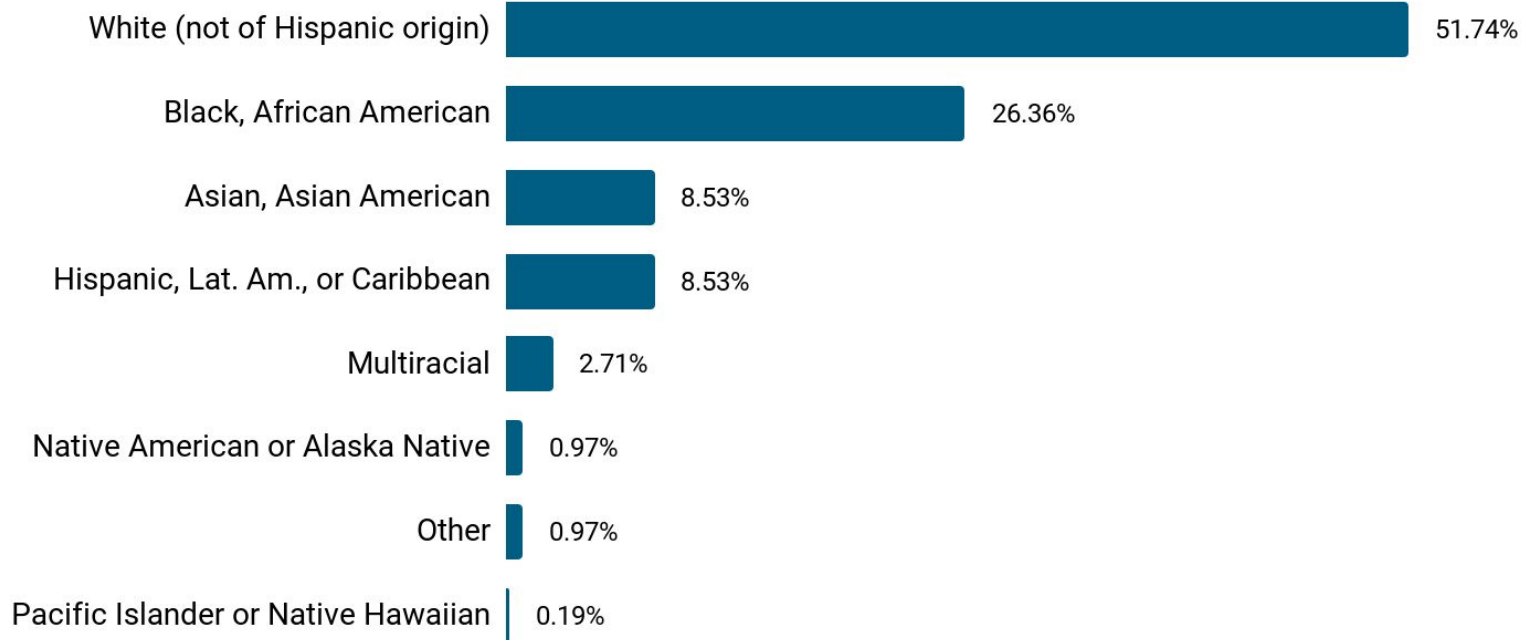
Which of the following includes your age?



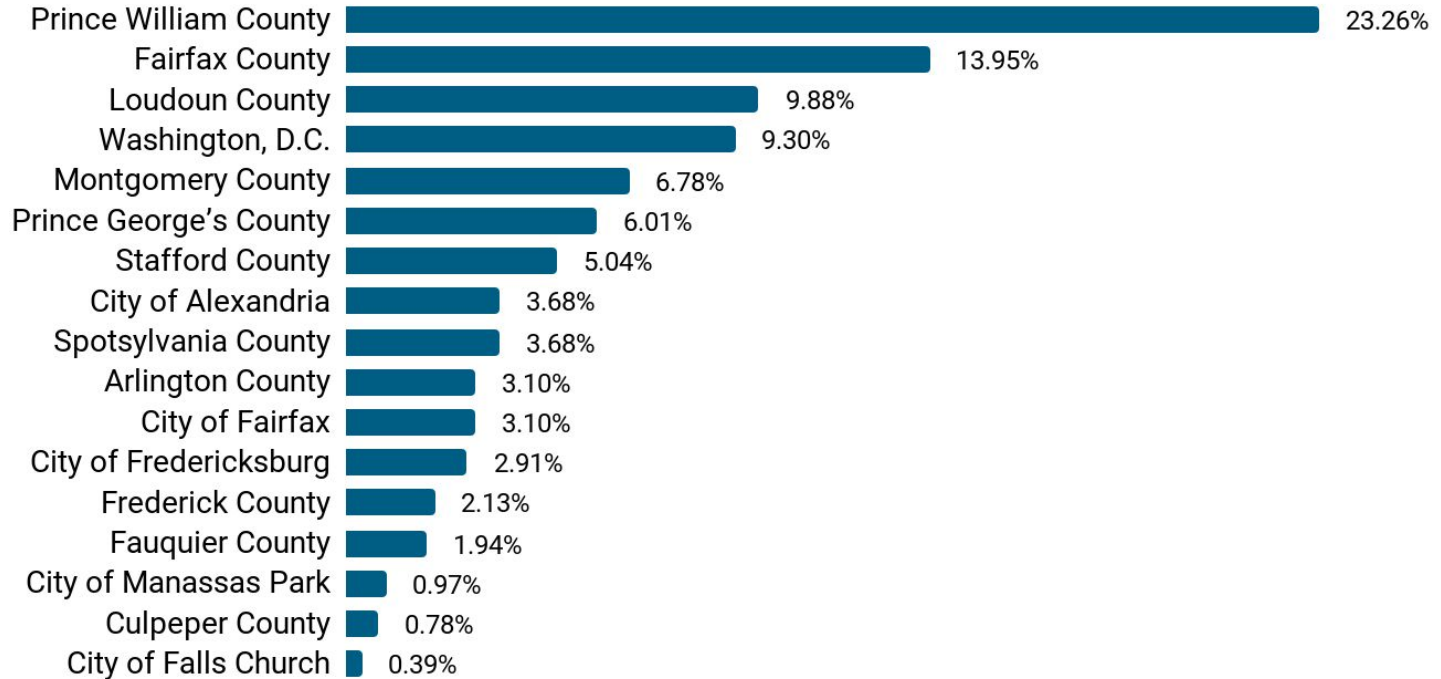
Which of the following ranges includes your total household income?



Which of the following best describes you?



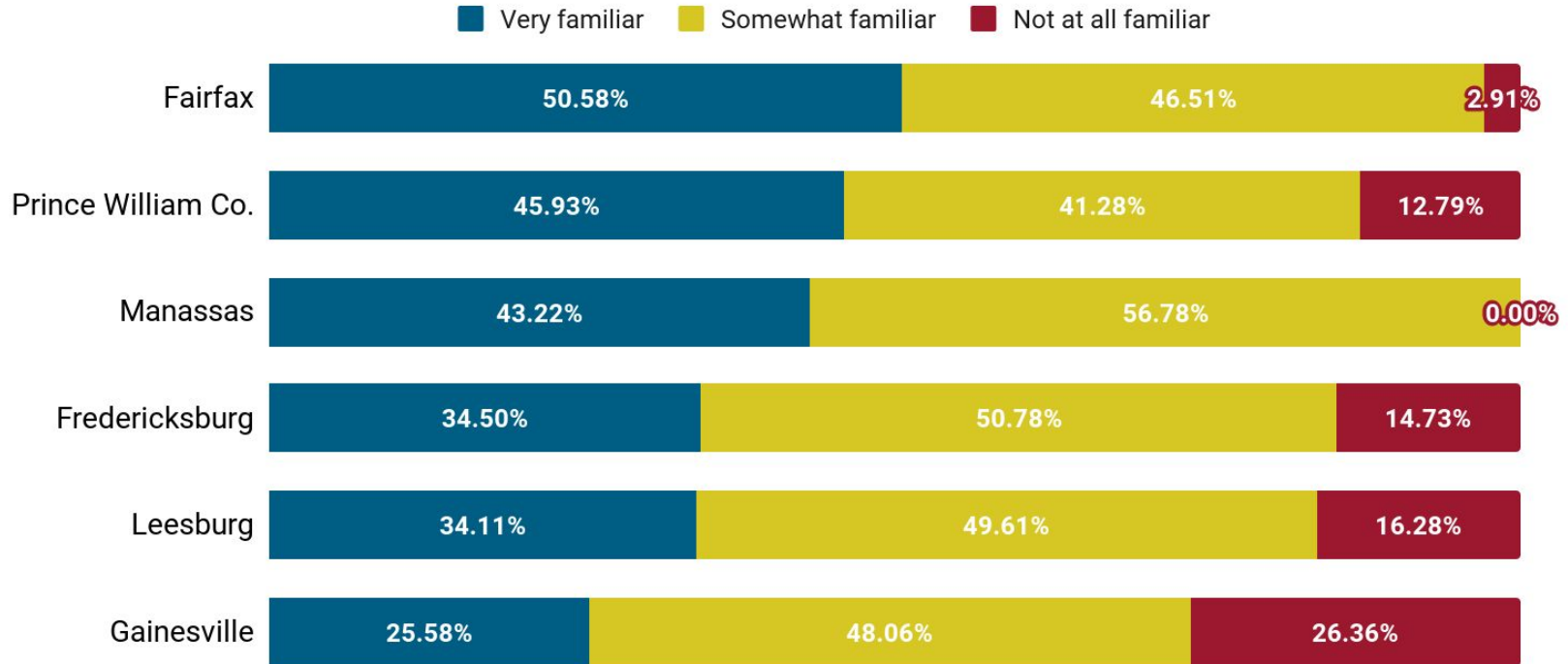
In which county or city do you currently live?



Familiarity

CAP Study

How familiar are you with the following places?



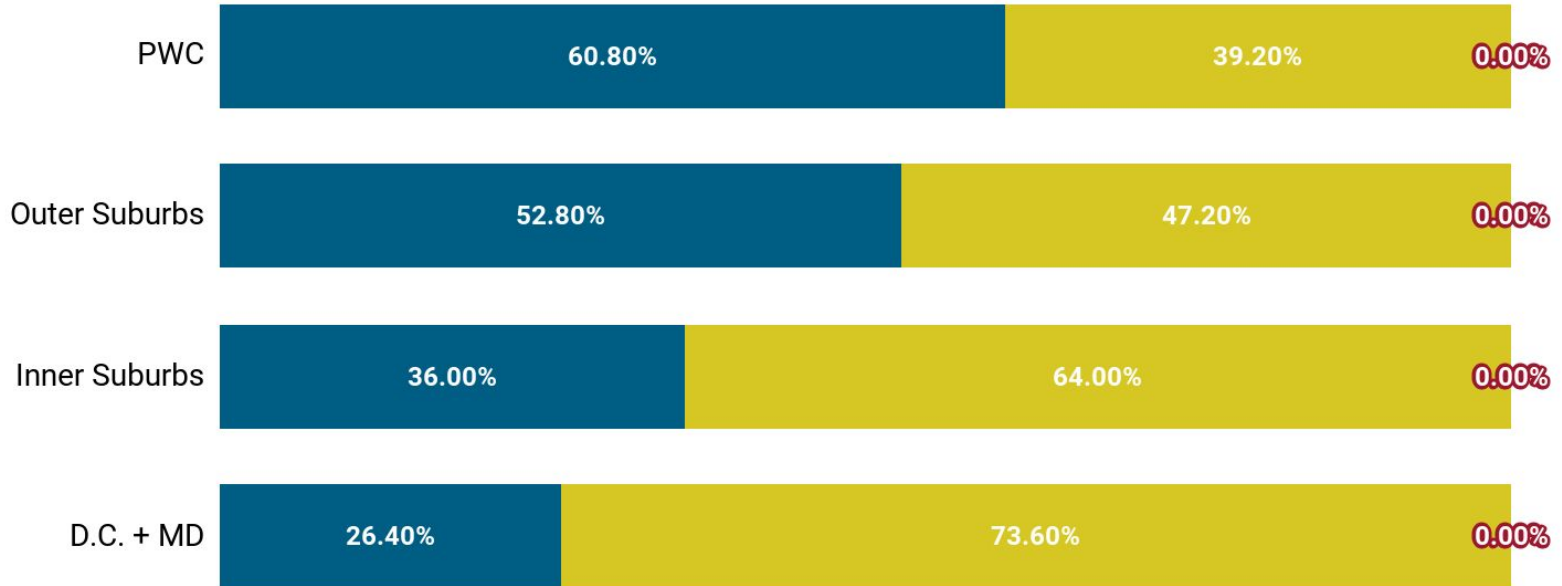
*All respondents "Not at all familiar" with Manassas were excluded from participation in this survey (as with all prior editions).

CAP Study

By Market, Manassas Only

How familiar are you with the following places?

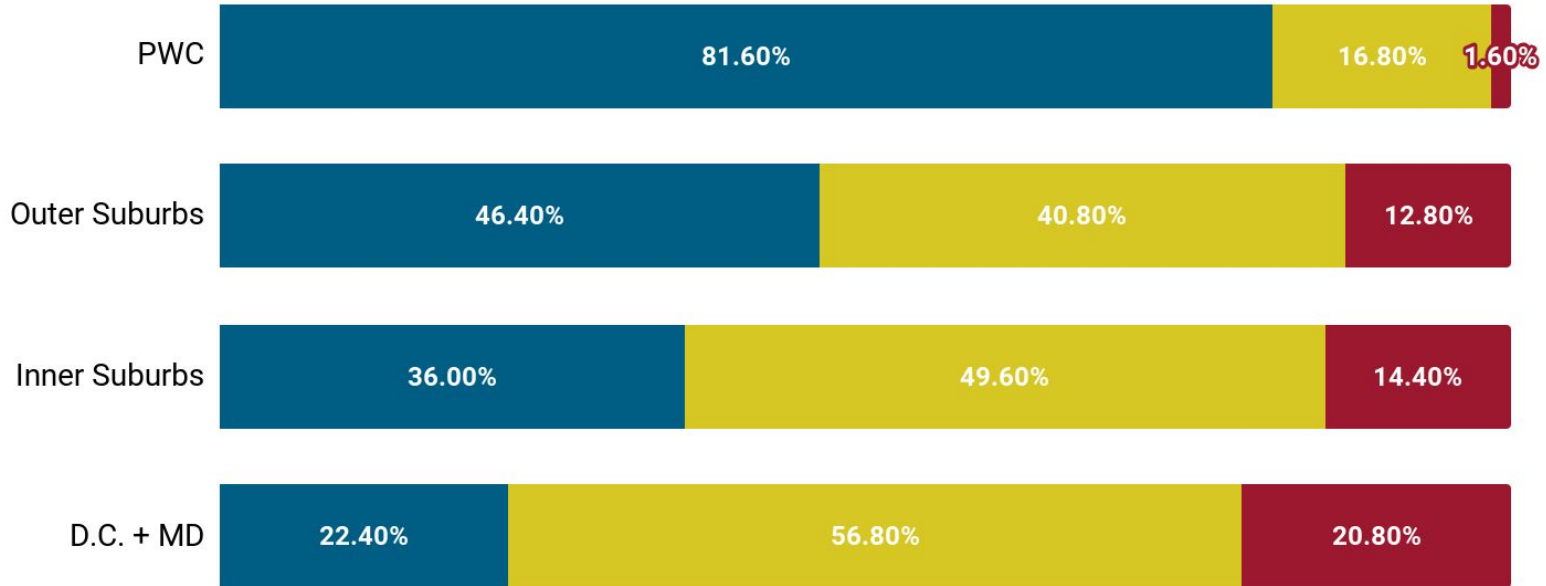
Very familiar Somewhat familiar Not at all familiar



CAP Study

By Market, Prince William County Only
How familiar are you with the following places?

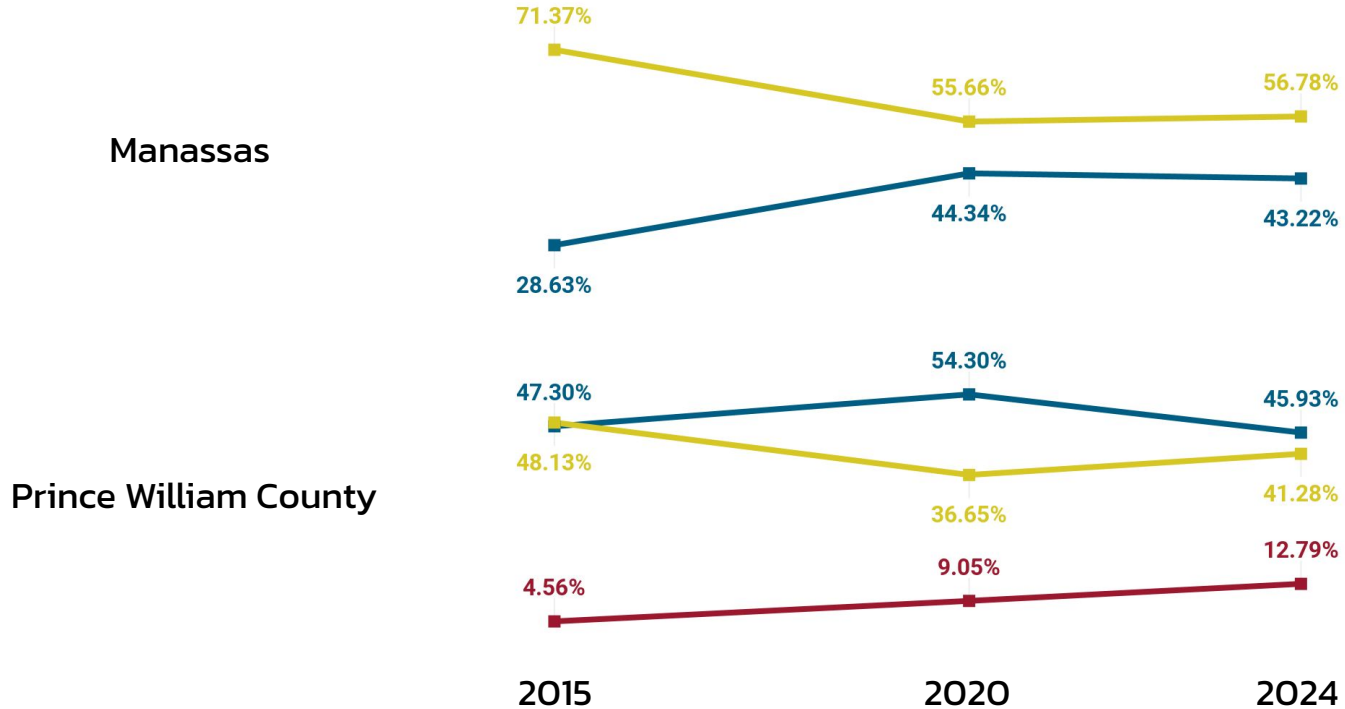
Very familiar Somewhat familiar Not at all familiar



CAP Study

By Study Year, Manassas and Prince William County Only
How familiar are you with the following places?

■ Very familiar ■ Somewhat familiar ■ Not at all familiar



CAP Study

By Study Year, Manassas and Prince William County Only How familiar are you with the following places?

		2015	2020	2024
Manassas	Very Familiar	28.63%	44.34%	43.22%
	Somewhat Familiar	71.37%	55.66%	56.78%
Prince William County	Very Familiar	47.30%	54.30%	45.93%
	Somewhat Familiar	48.13%	36.65%	41.28%
	Not At All Familiar	4.56%	9.05%	12.79%

*All respondents "Not at all familiar" with Manassas were excluded from participation in this survey (as with all prior editions).

Unaided Perceptions

CAP Study

When you think of the following places, what is the first adjective or descriptive phrase that comes to mind?

City of Fairfax

- Expensive, rich
- Busy, crowded
- Nice, clean
- Urban

City of Fredericksburg

- Historic
- Far away
- Rural, country
- Nice, friendly

Gainesville

- Rural, country
- Far away
- Boring
- Nice, good

Leesburg

- Far away
- Historic
- Country, quaint
- Shopping

City of Manassas

- Historic, old, battlefield
- Nice, quiet, small
- Run-down, unsafe
- Far away

Prince William County

- Nice, beautiful
- Woodbridge
- Rural, horses, country
- Diverse

CAP Study

By Study Year, Manassas Only

When you think of the following places, what is the first adjective or descriptive phrase that comes to mind?

2015

- Old Town Manassas
- Historic
- Quaint
- Shopping

2020

- Civil War history
- Old Town
- Shopping options
- Somewhat country, rural

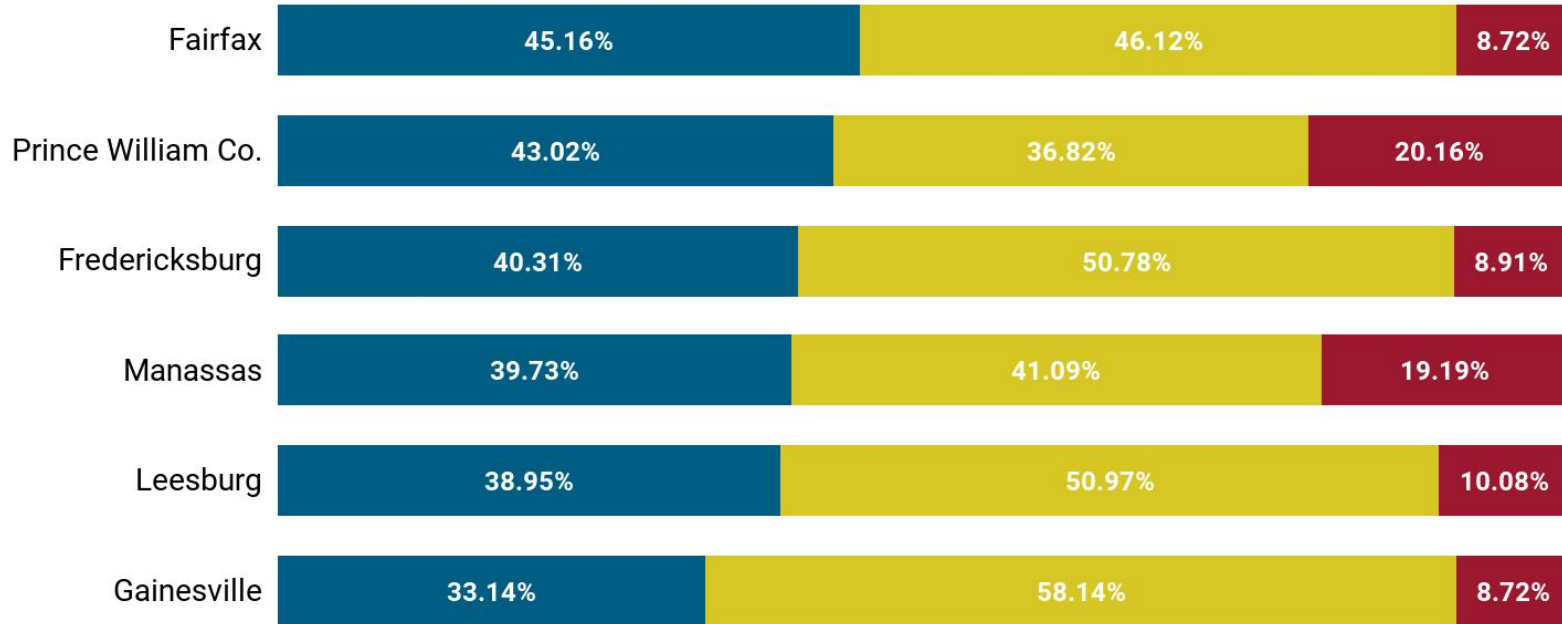
2024

- Historic, old, battlefield
- Nice, quiet, small
- Run-down, unsafe
- Far away

CAP Study

From your perspective, do you think the following places are improving, staying the same, or declining?

■ Improving ■ Staying the Same ■ Declining

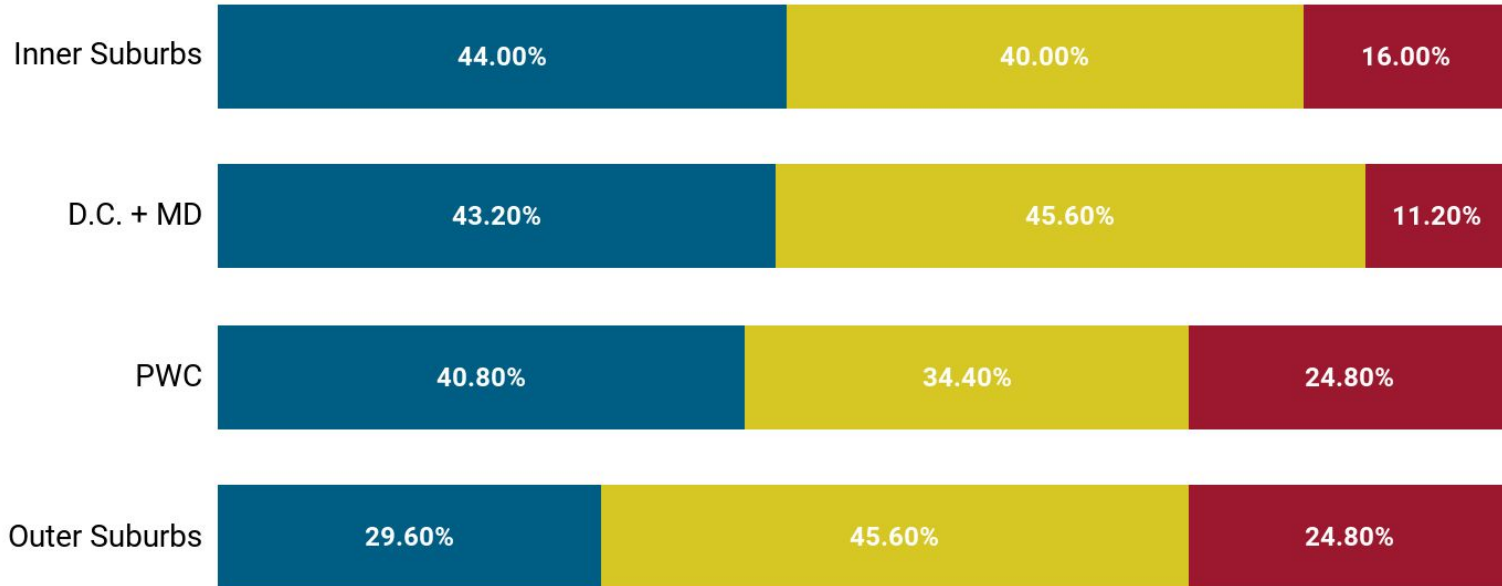


CAP Study

By Market, Manassas Only

From your perspective, do you think the following places are improving, staying the same, or declining?

■ Improving ■ Staying the Same ■ Declining



CAP Study

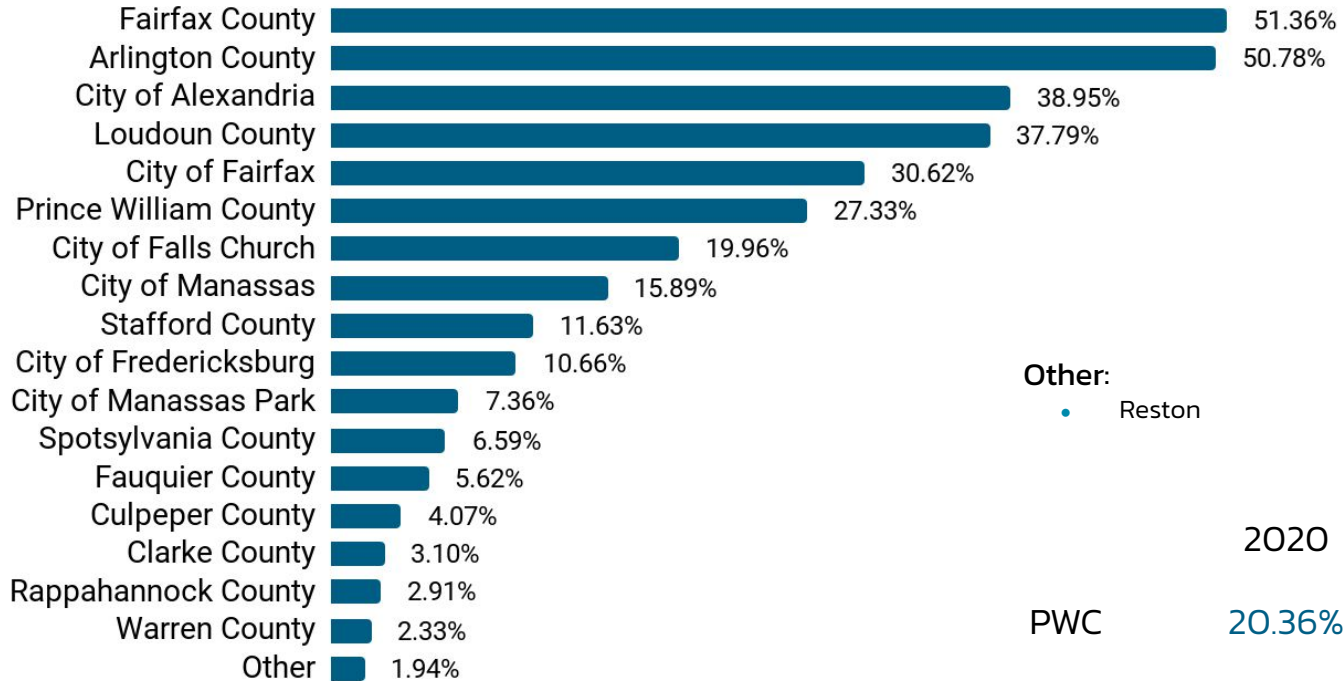
By Market, Prince William County Only

From your perspective, do you think the following places are improving, staying the same, or declining?

■ Improving ■ Staying the Same ■ Declining



Which Northern Virginia communities do you associate with high tech firms? *Choose all that apply.*



Other:

- Reston

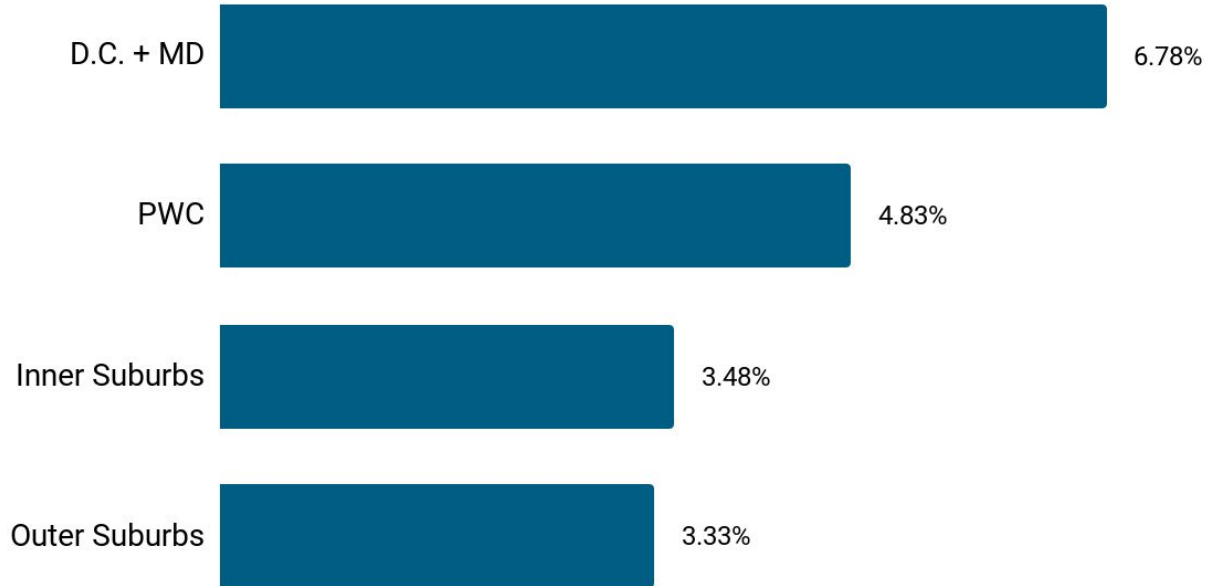
	2020	2024
PWC	20.36%	27.33%
Manassas	7.24%	15.89%

CAP Study

By Market, Manassas Only

Which Northern Virginia communities do you associate with high tech firms?

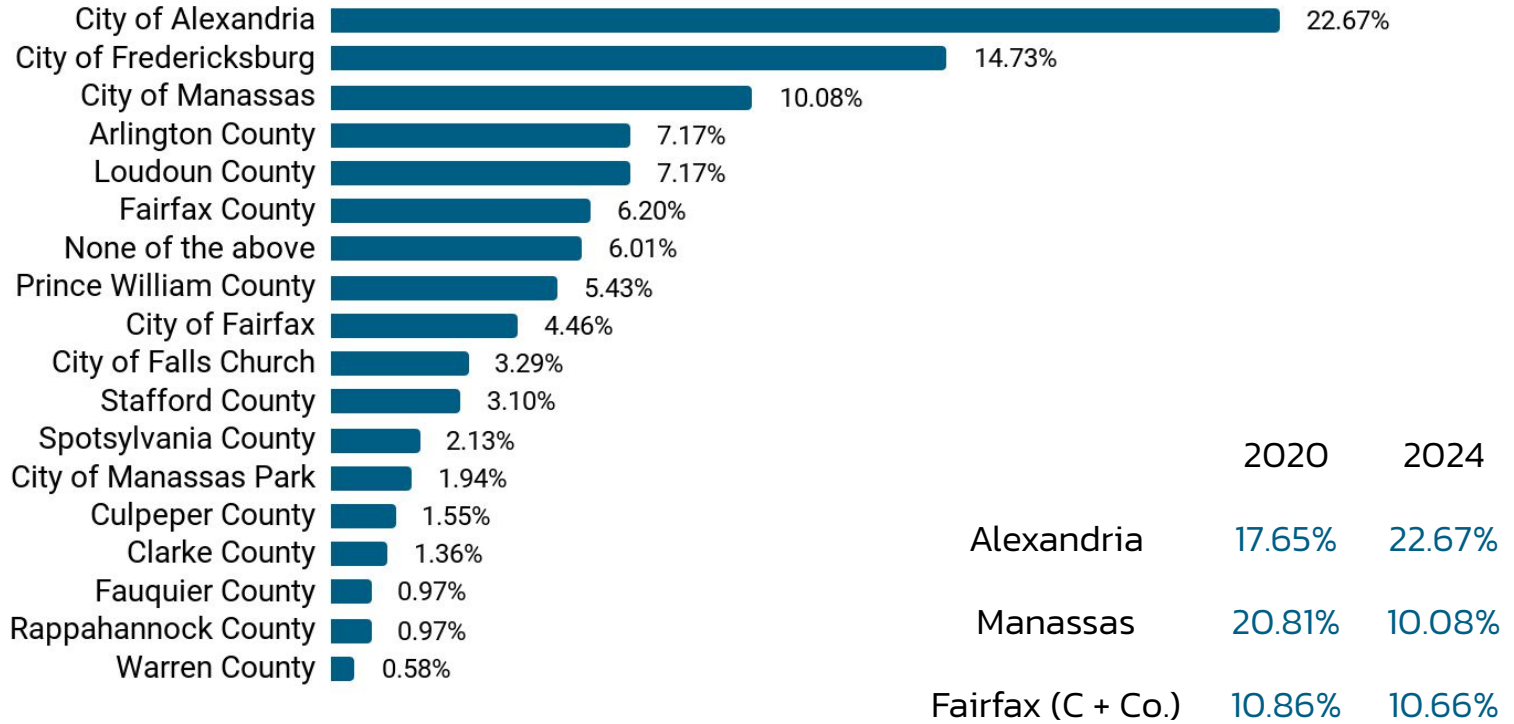
Choose all that apply.



CAP Study

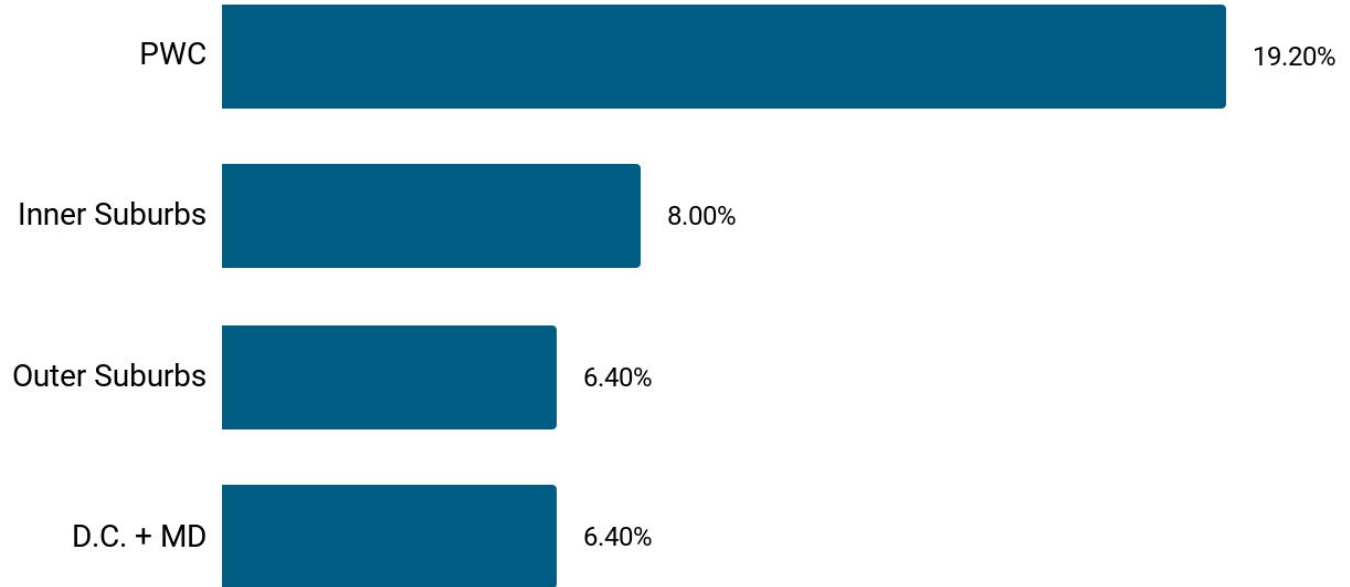
2020 Equivalent Was Open-Ended Question

Which Northern Virginia community do you think best exemplifies the phrase "Historic Heart. Modern Beat."?



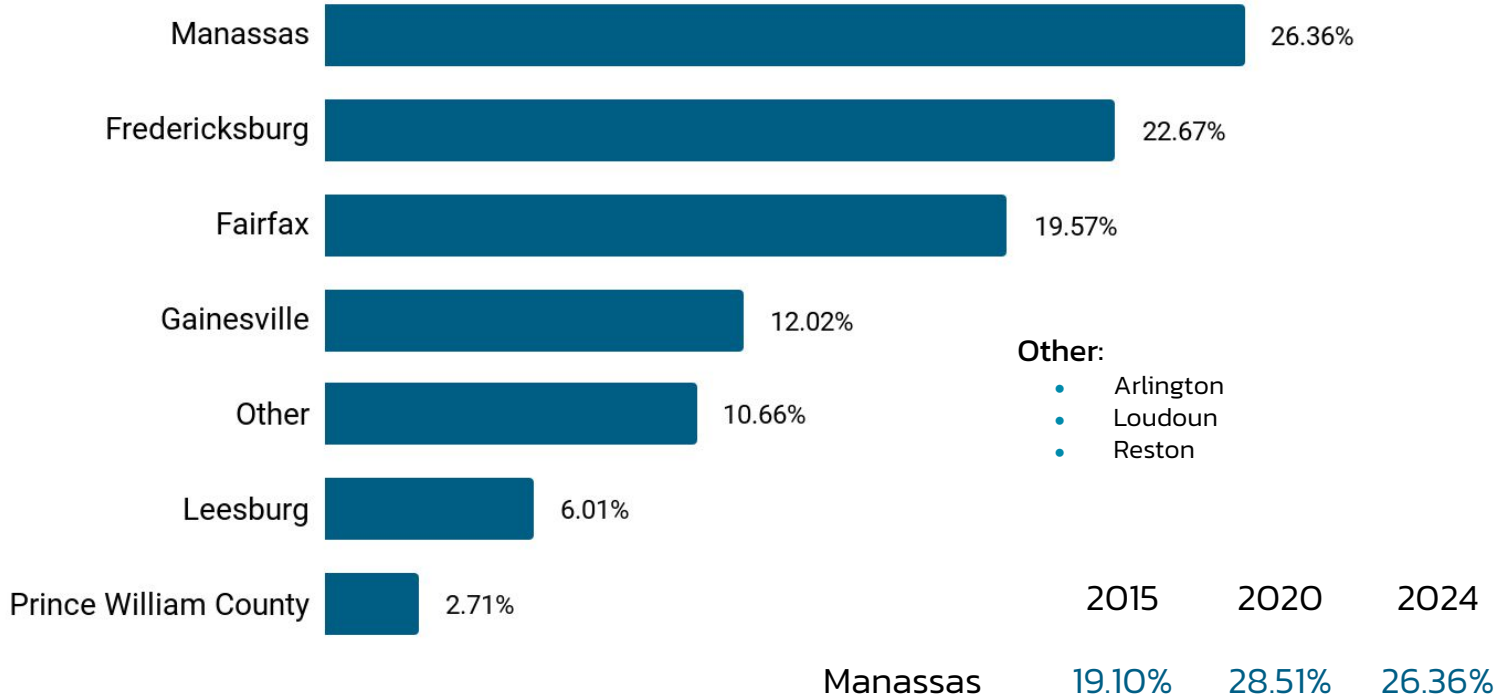
By Market, Manassas Only

Which Northern Virginia community do you think best exemplifies the phrase "Historic Heart. Modern Beat."?

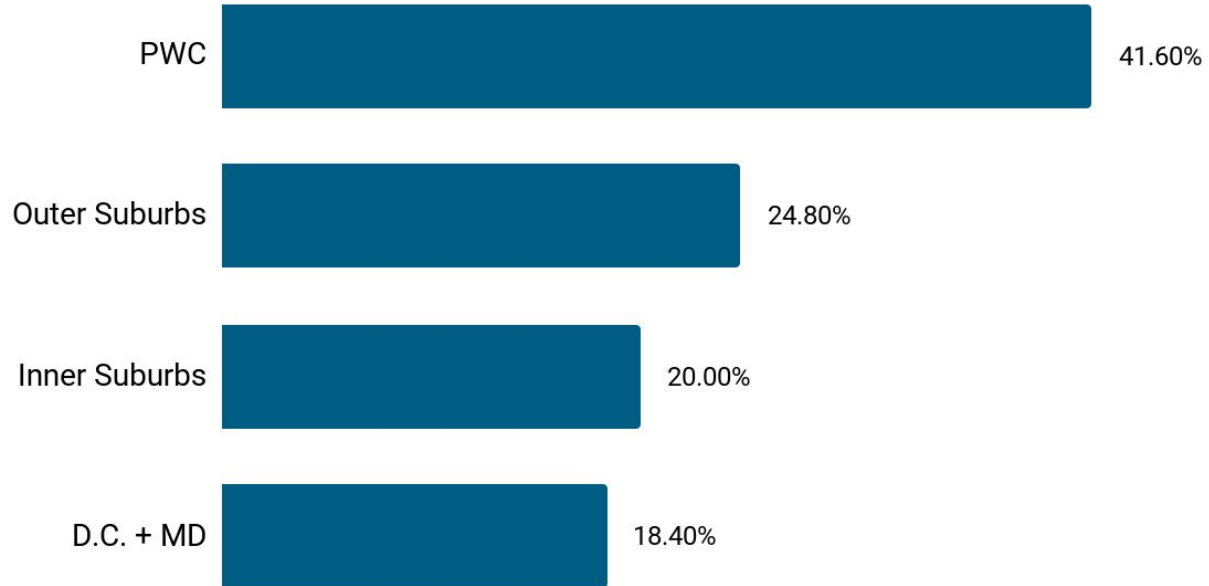


2015 Equivalent Was Open-Ended Question

Which city is home to Micron, BAE, Boeing, Lockheed Martin, and Leidos companies?

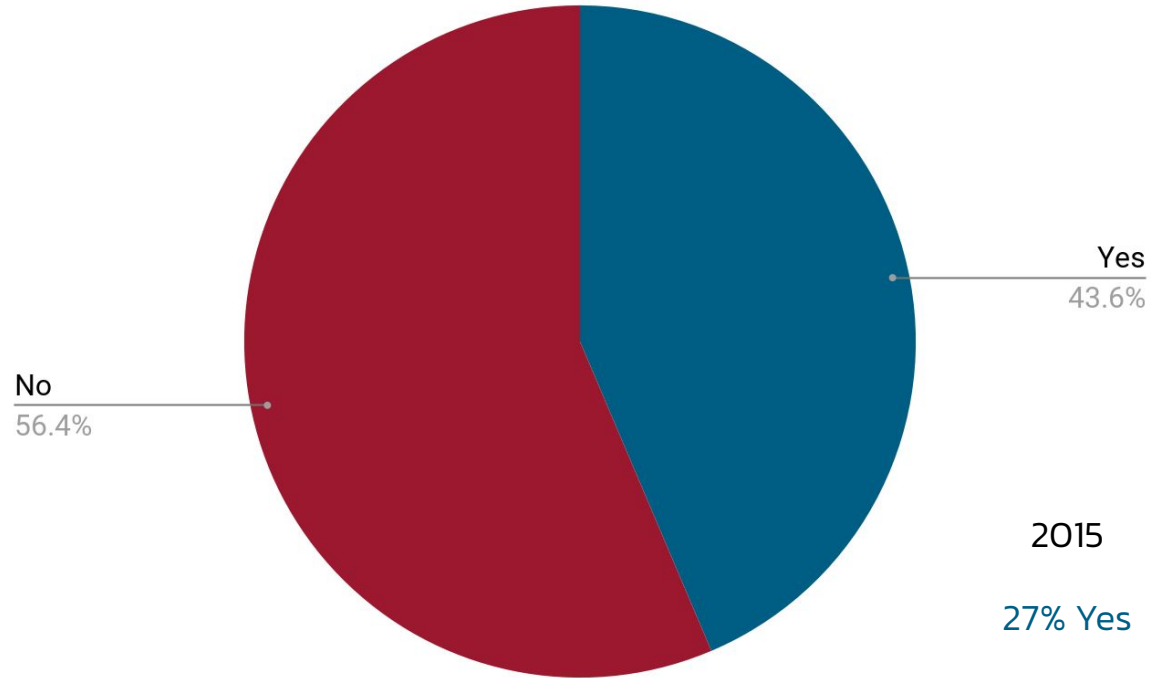


Which city is home to Micron, BAE, Boeing, Lockheed Martin, and Leidos companies?



Perceptions

Do you associate Prince William County with high tech firms?



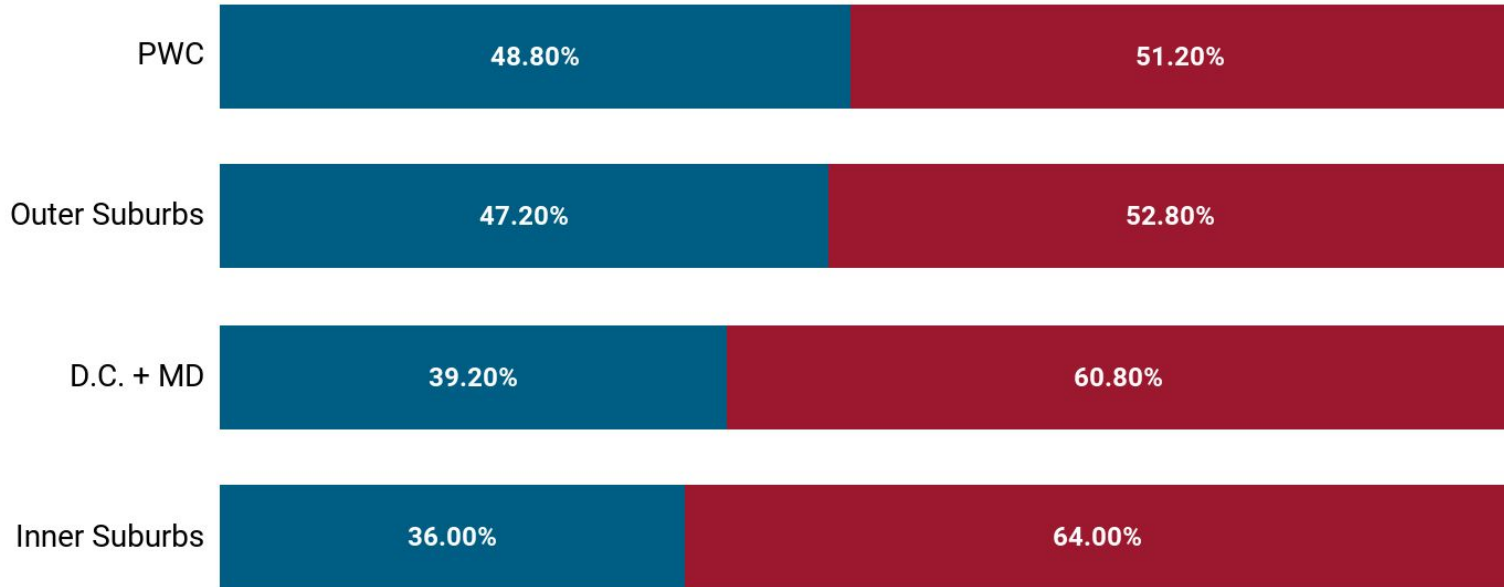
2015	2020	2024
27% Yes	33% Yes	44% Yes
73% No	67% No	56% No

CAP Study

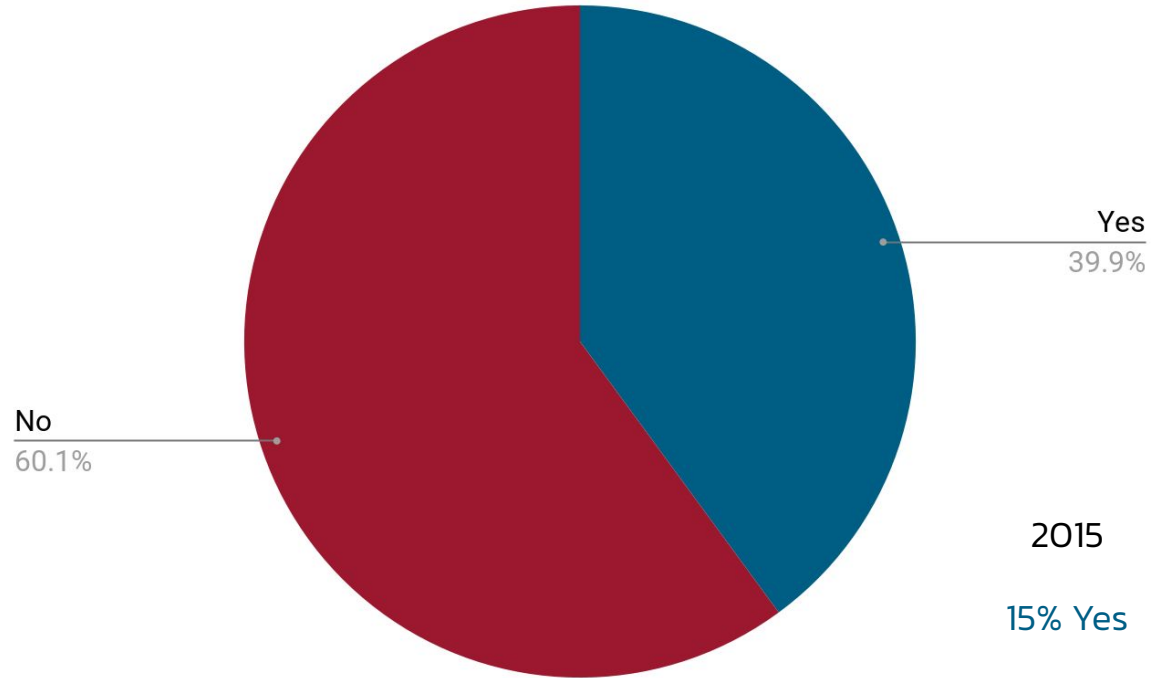
By Market

Do you associate Prince William County with high tech firms?

■ Yes ■ No



Do you associate the City of Manassas with high tech firms?



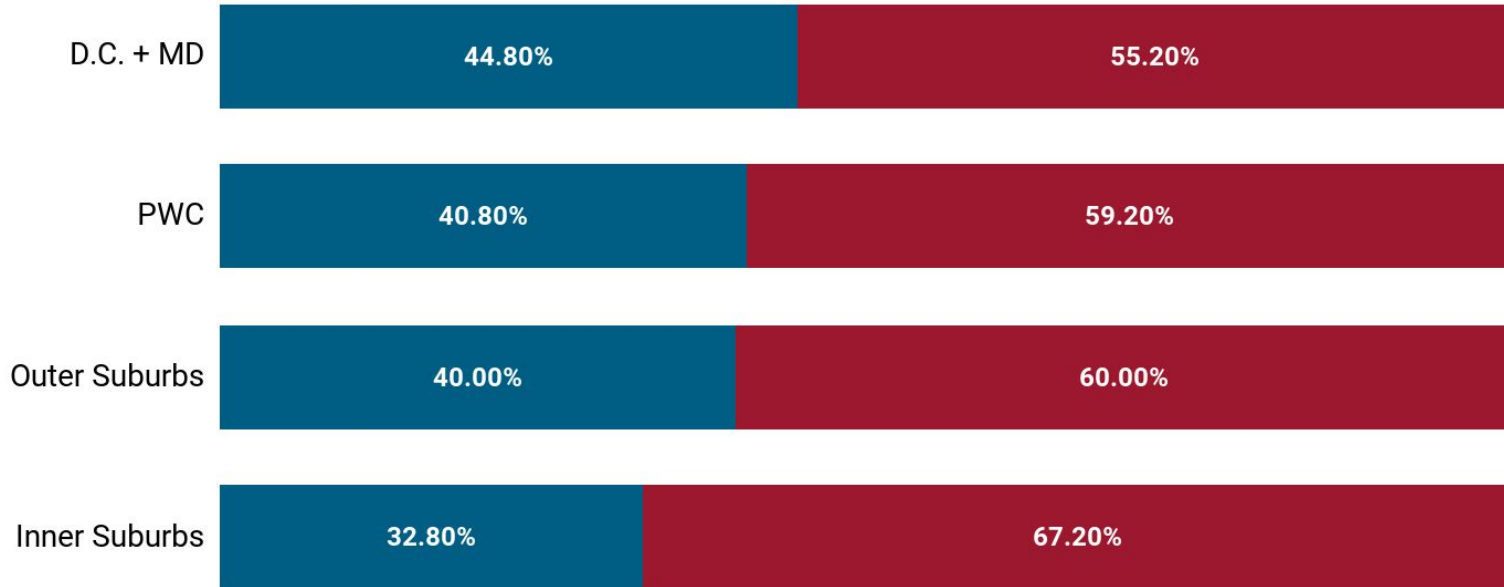
2015	2020	2024
15% Yes	26% Yes	40% Yes
85% No	74% No	60% No

CAP Study

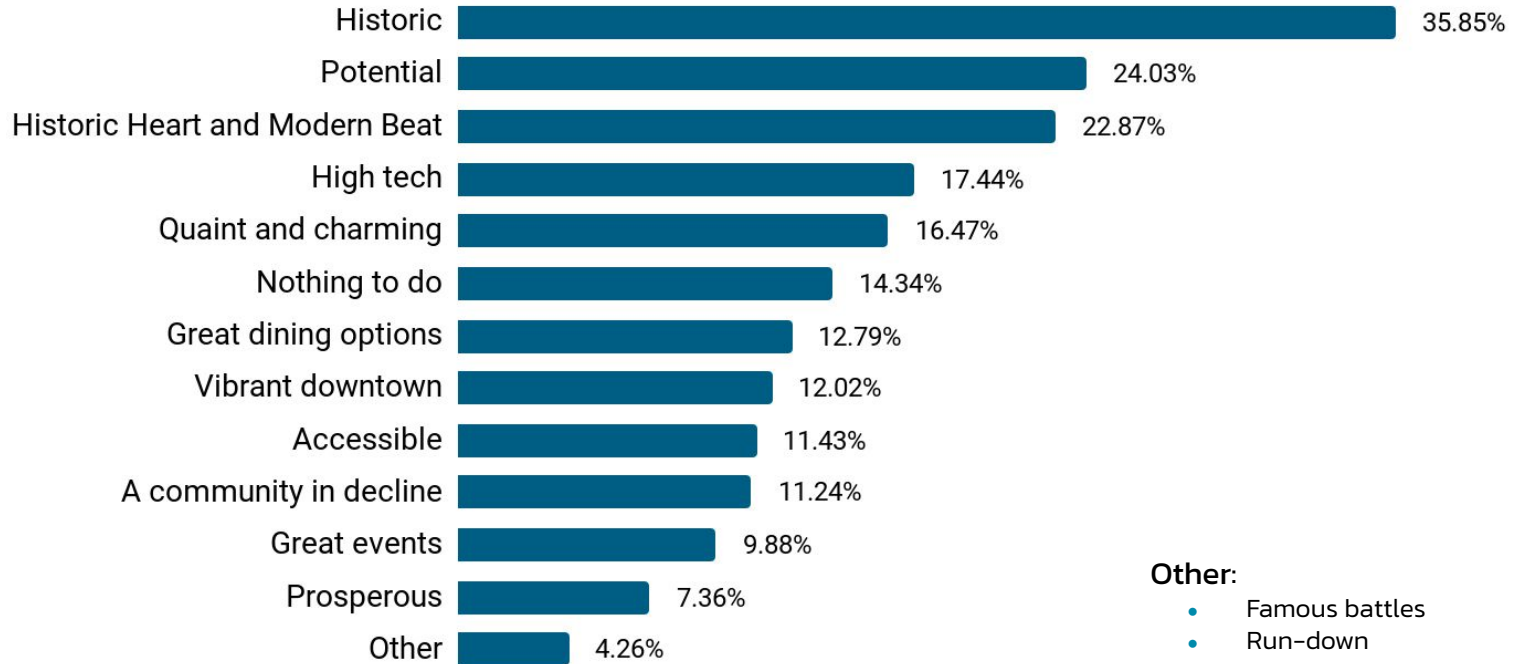
By Market

Do you associate the City of Manassas with high tech firms?

■ Yes ■ No



Which phrase or adjective best describes the City of Manassas, Virginia?
Choose two answers.

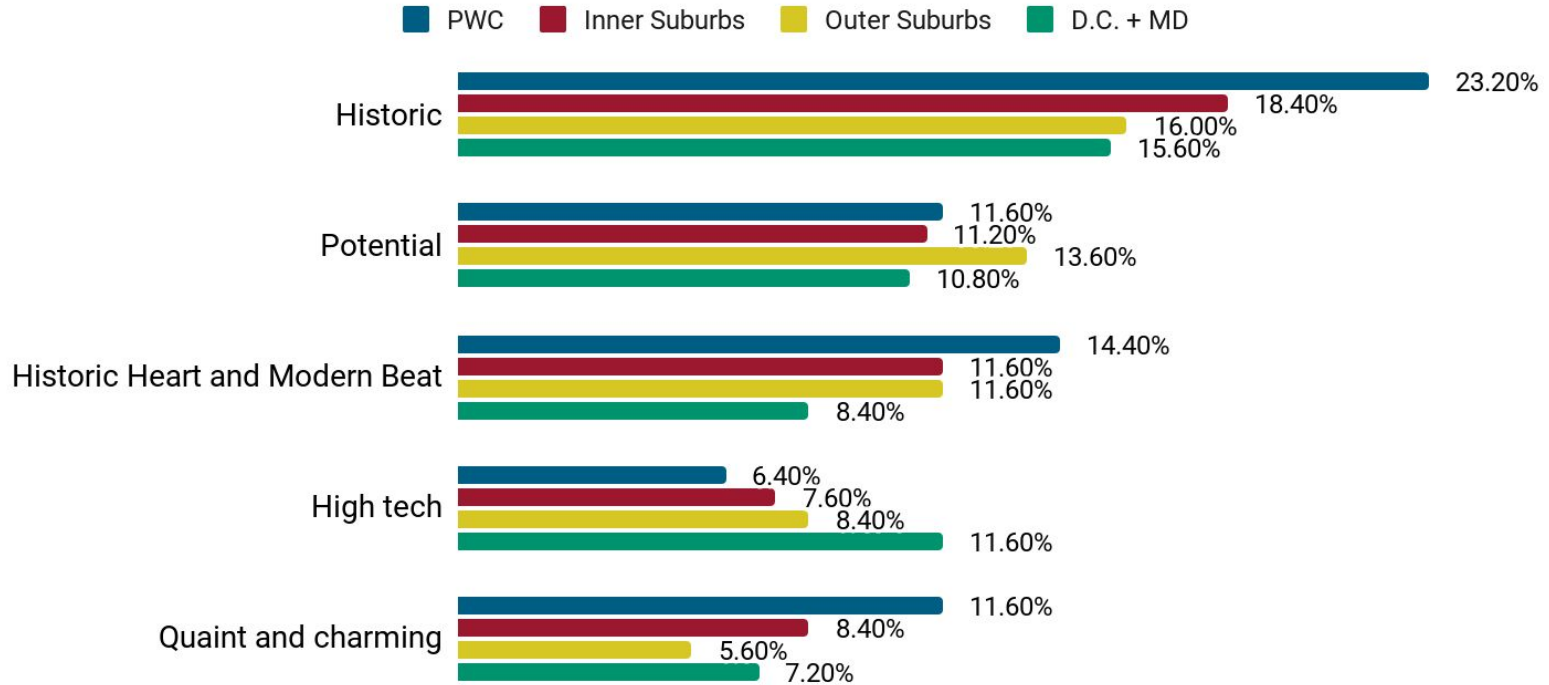


CAP Study

By Market, Top Third

Which phrase or adjective best describes the City of Manassas, Virginia?

Choose two answers.

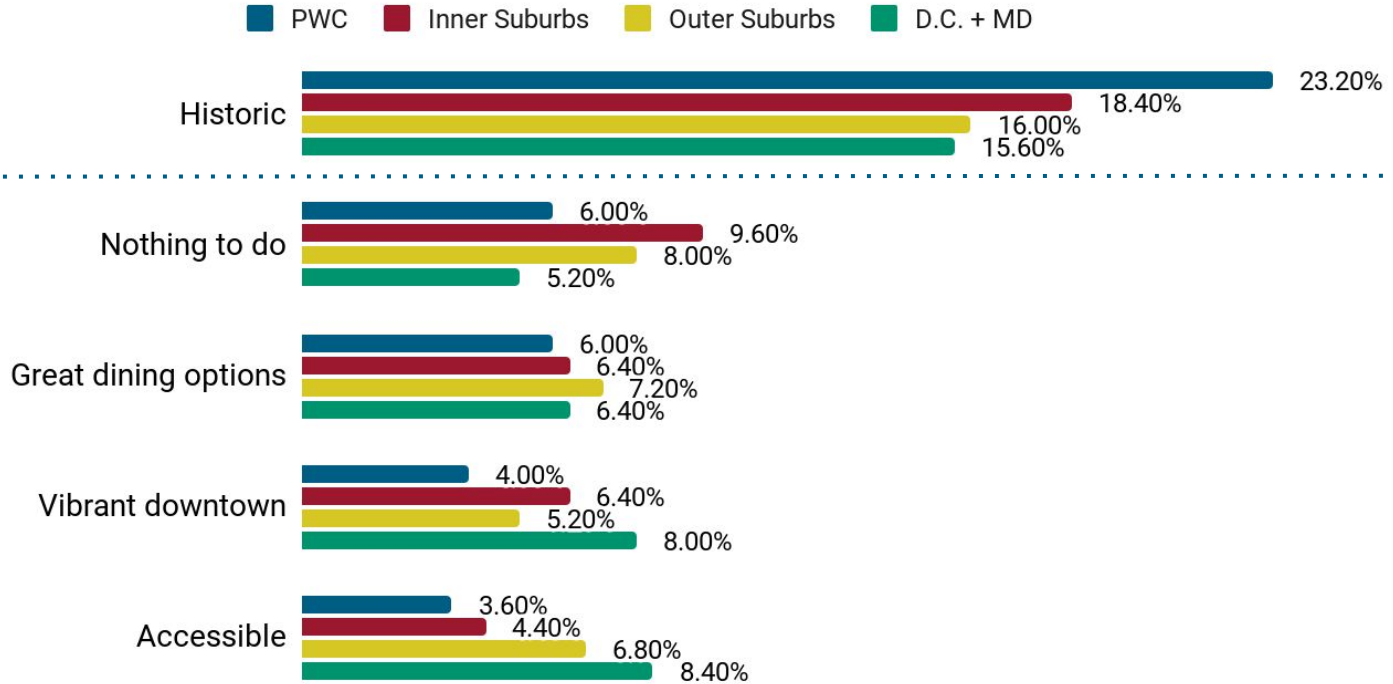


CAP Study

By Market, Middle Third

Which phrase or adjective best describes the City of Manassas, Virginia?

Choose two answers.

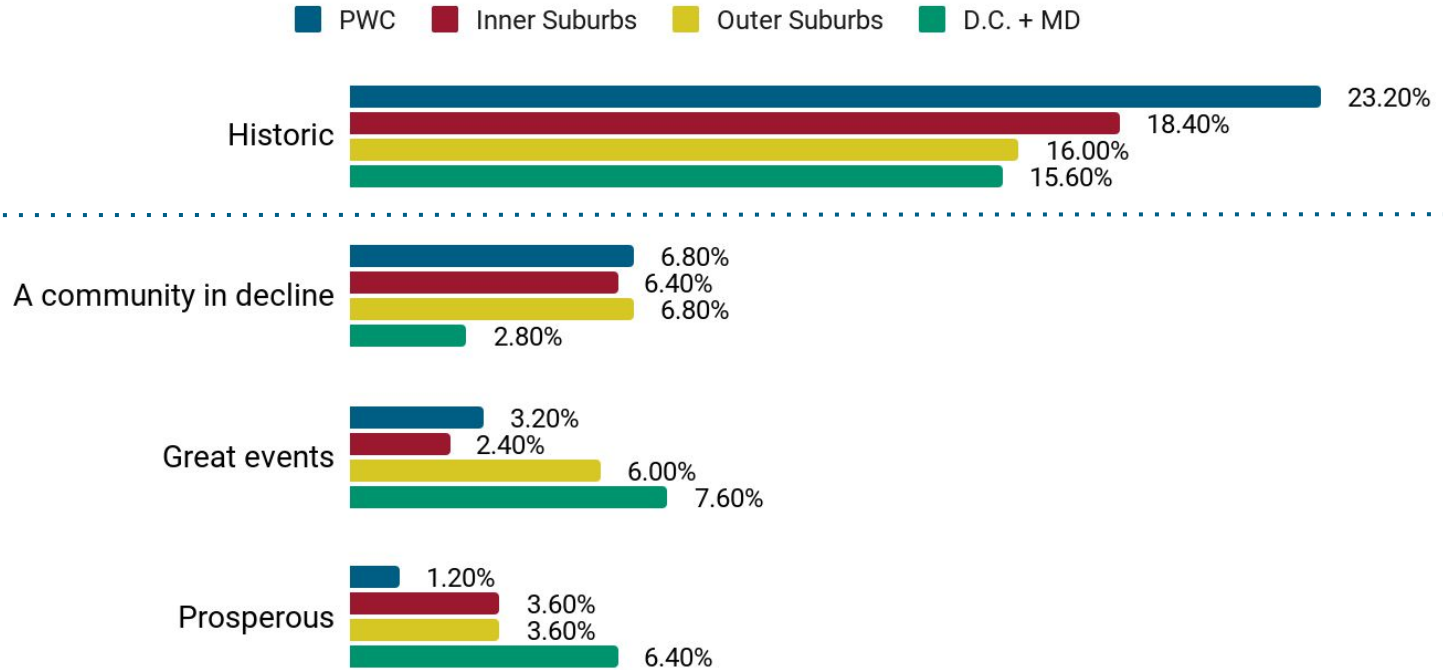


CAP Study

By Market, Bottom Third

Which phrase or adjective best describes the City of Manassas, Virginia?

Choose two answers.

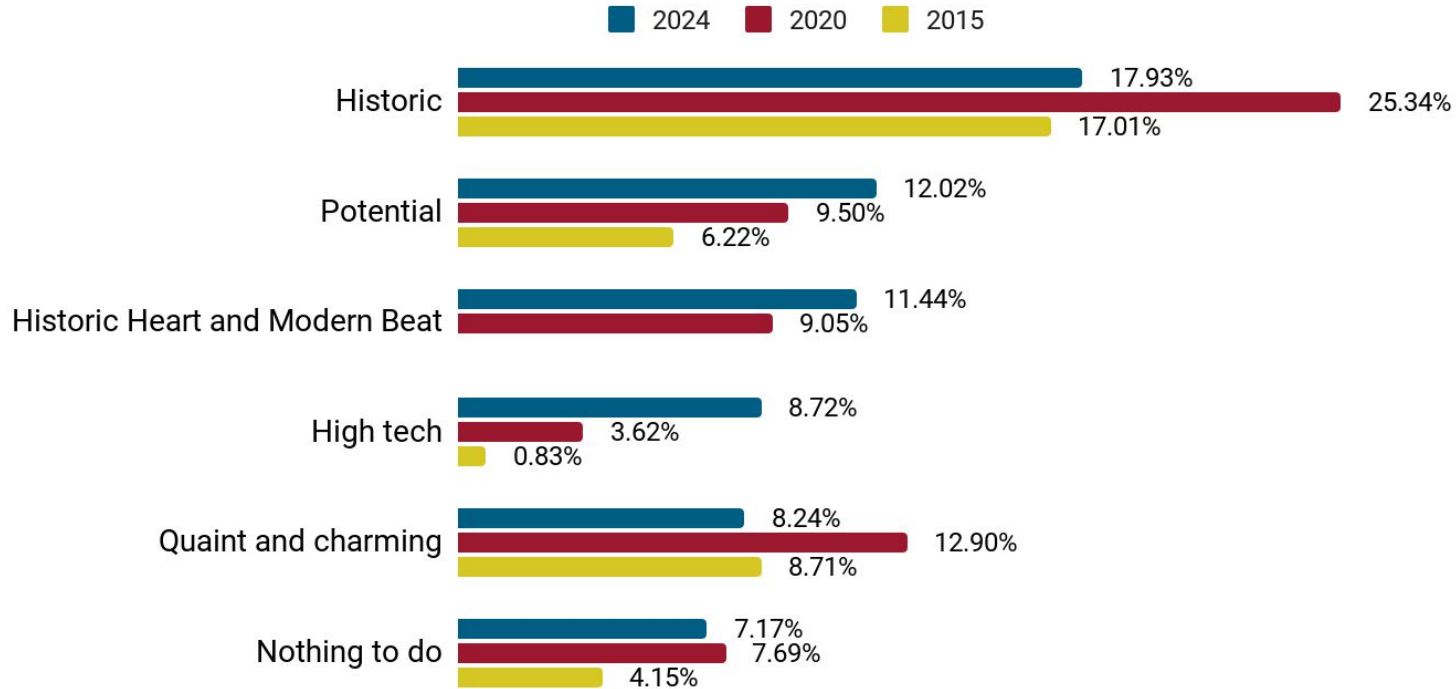


CAP Study

By Study Year, Top Half

Which phrase or adjective best describes the City of Manassas, Virginia?

Choose two answers.



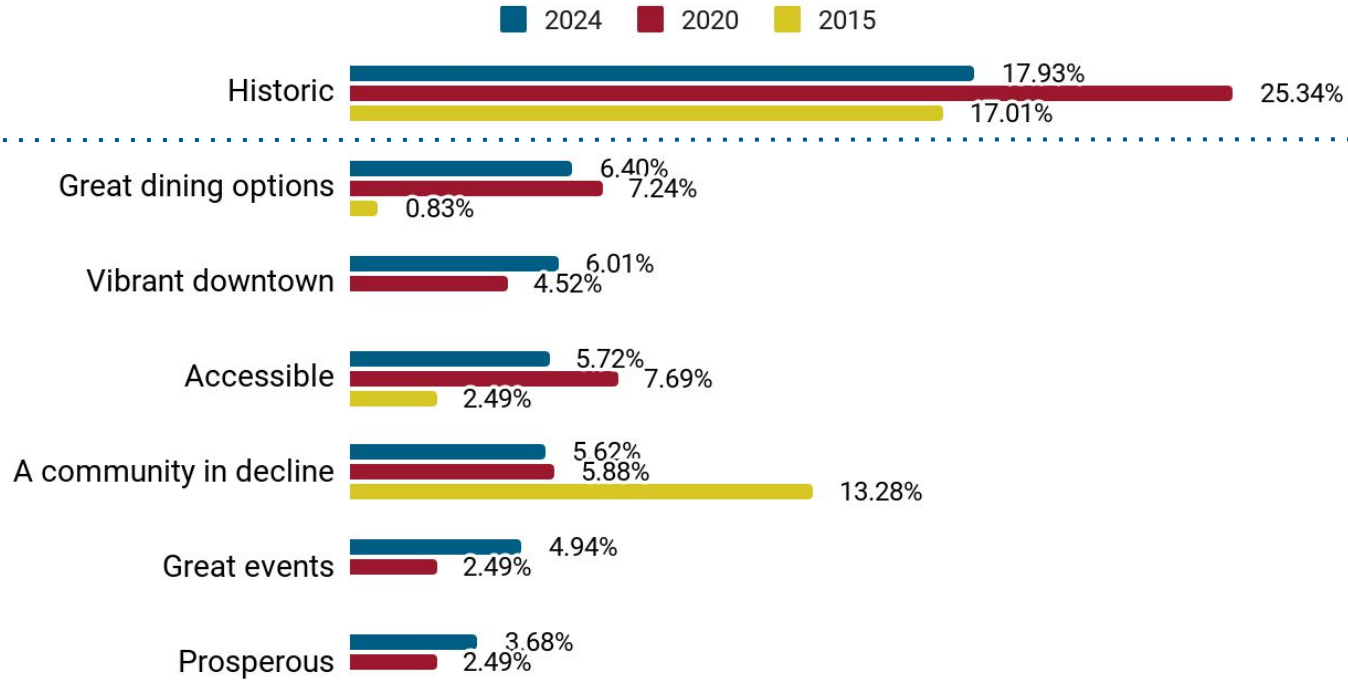
*Percentages have been normalized to add up to 100% to match 2015 data.

CAP Study

By Study Year, Bottom Half

Which phrase or adjective best describes the City of Manassas, Virginia?

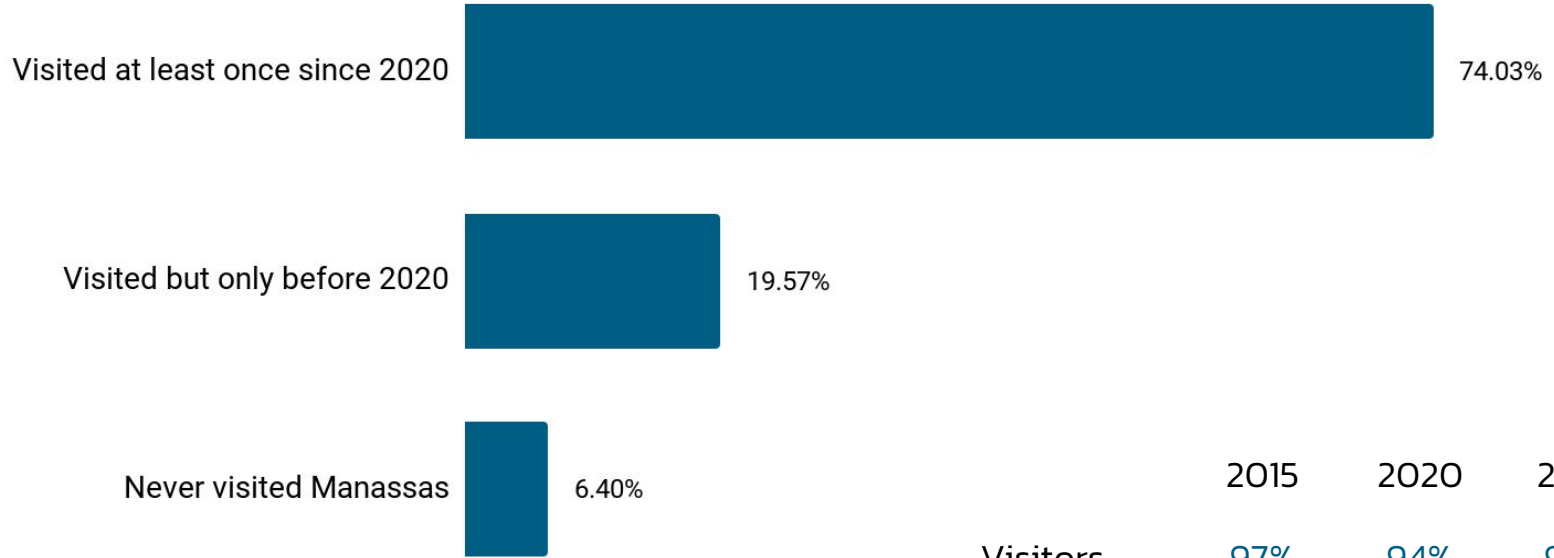
Choose two answers.



*Percentages have been normalized to add up to 100% to match 2015 data.

CAP Study

Have you ever visited Manassas?



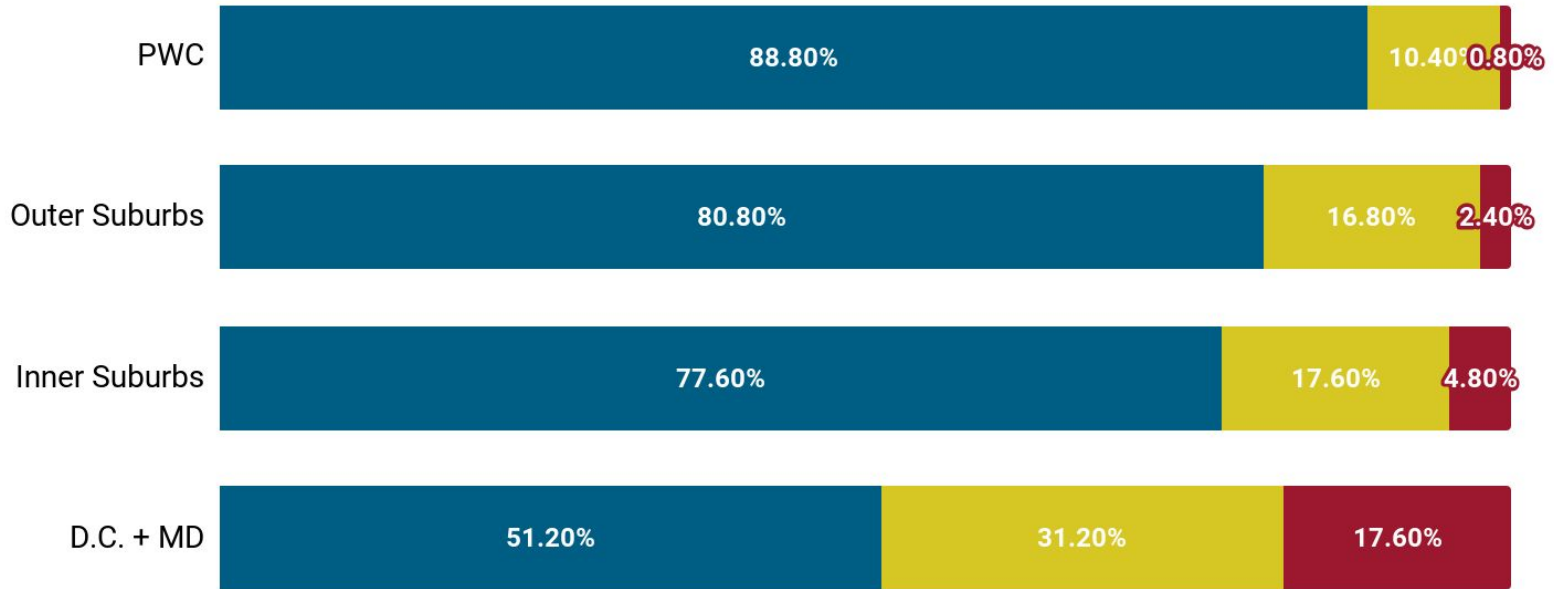
	2015	2020	2024
Visitors	97%	94%	94%
Non-Visitors	3%	6%	6%

CAP Study

By Market

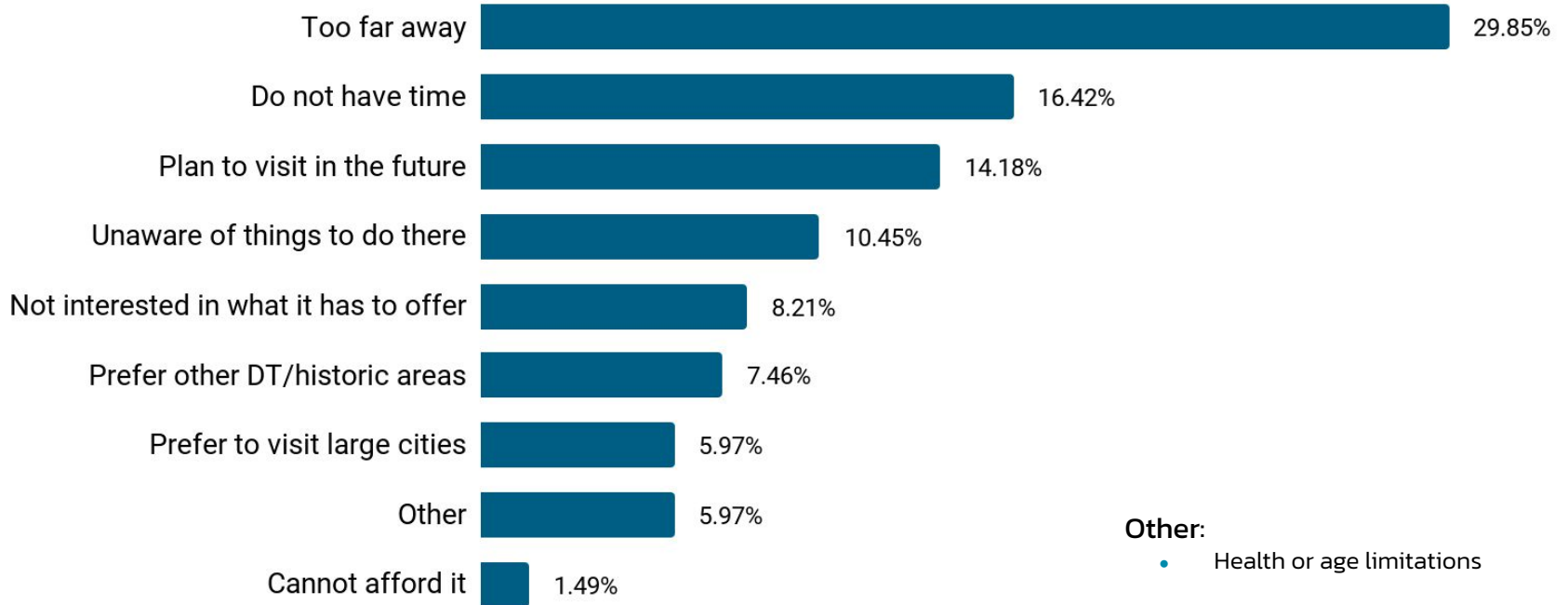
Have you ever visited Manassas?

■ Visited Since 2020 ■ Visited Before 2020 ■ Has Not Visited



Non-Visitors

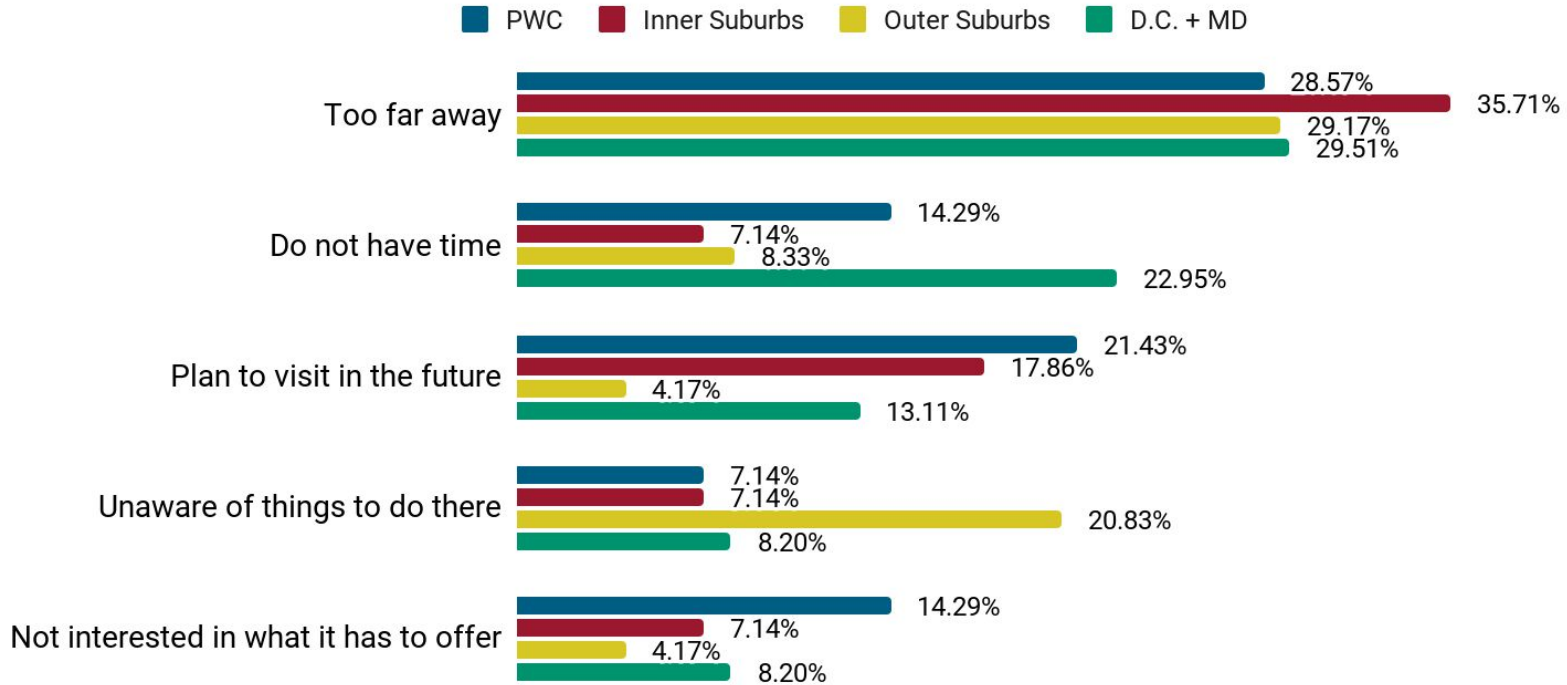
Why have you not visited Manassas recently?



CAP Study

By Market, Top Half

Why have you not visited Manassas recently?

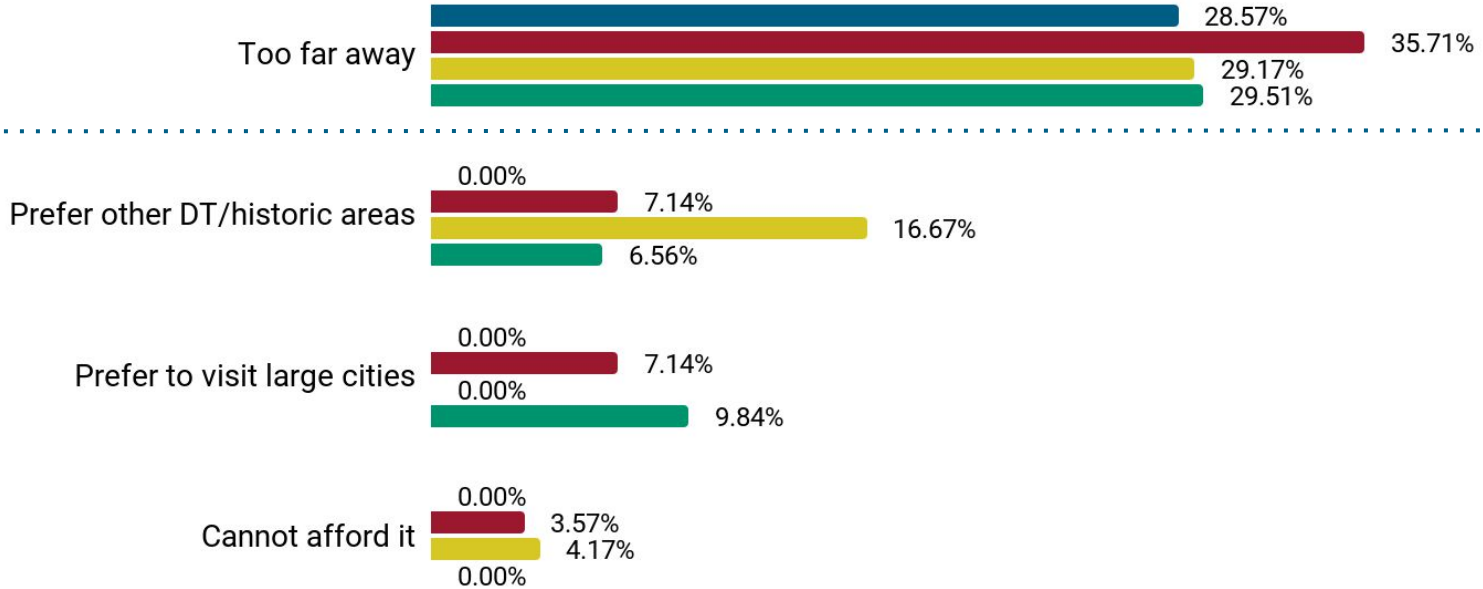


CAP Study

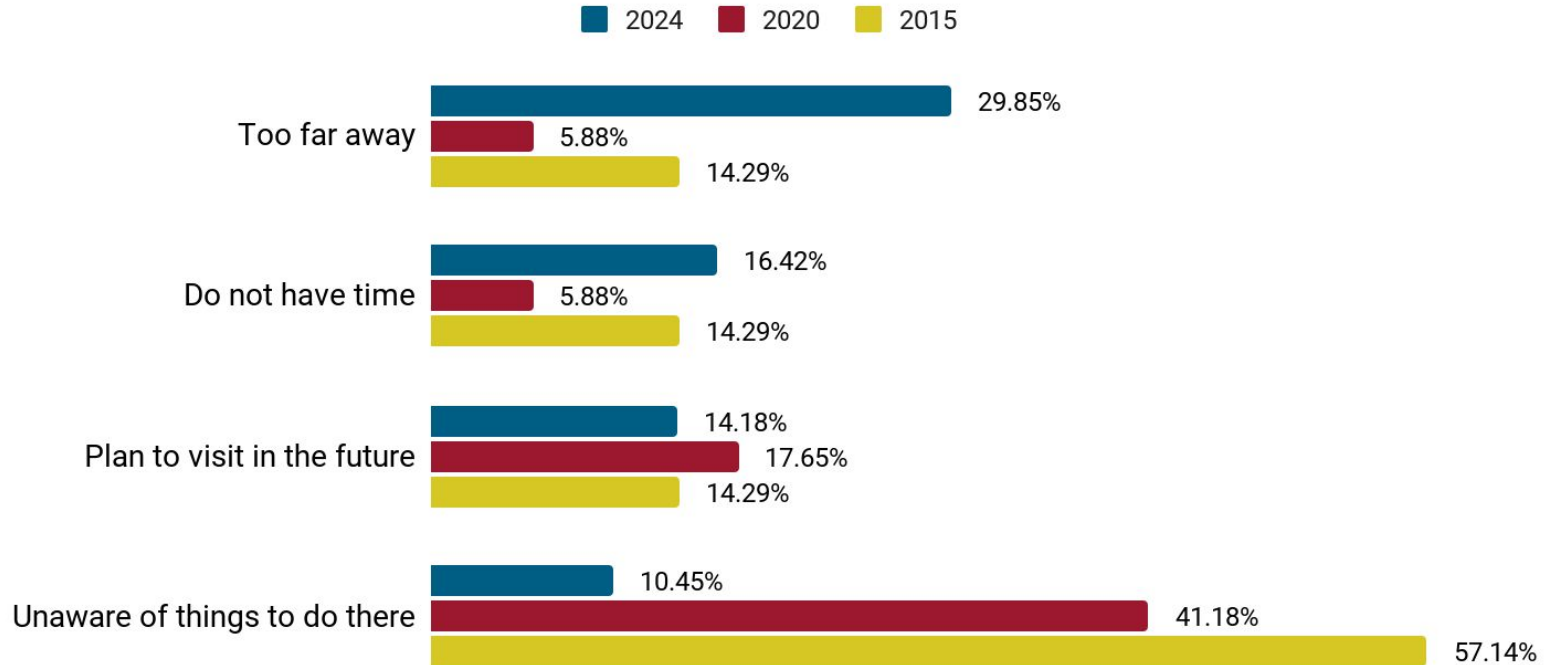
By Market, Bottom Half

Why have you not visited Manassas recently?

■ PWC ■ Inner Suburbs ■ Outer Suburbs ■ D.C. + MD



By Study Year, Top Half Why have you not visited Manassas recently?

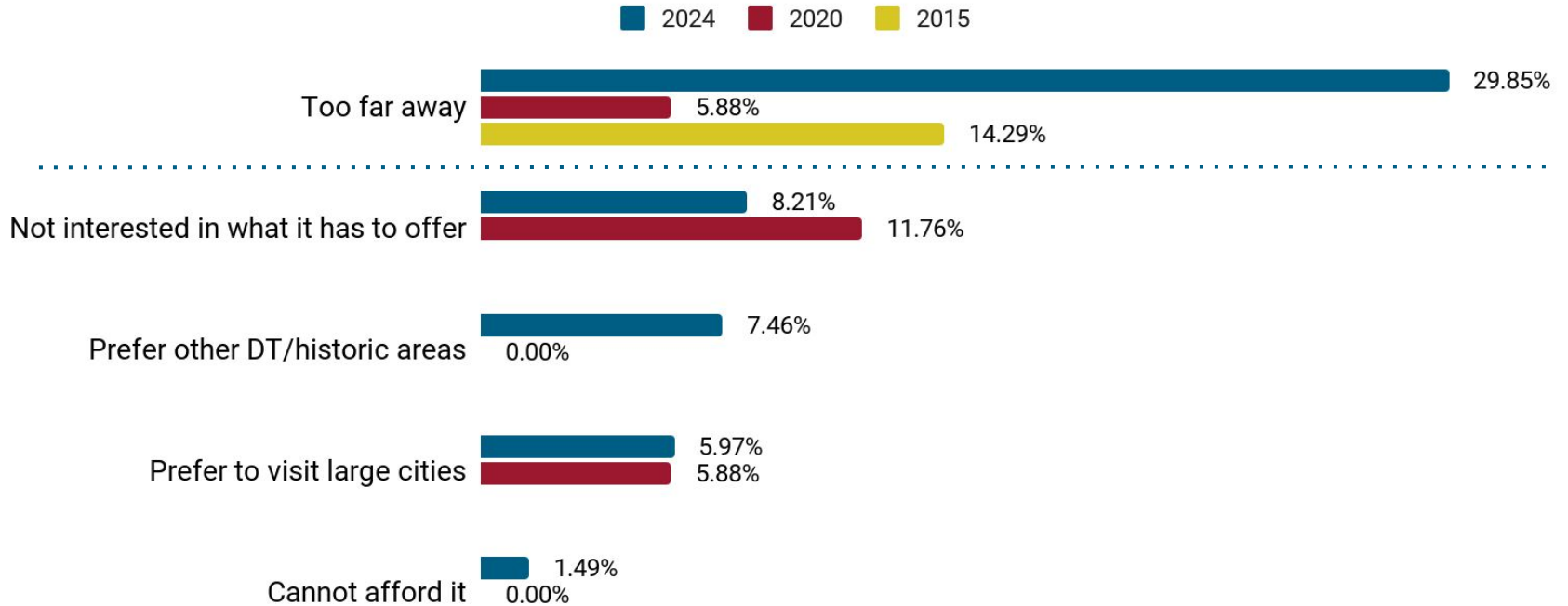


*The 2020 and 2015 studies each had less than 10 non-visitors who contributed their answers.

CAP Study

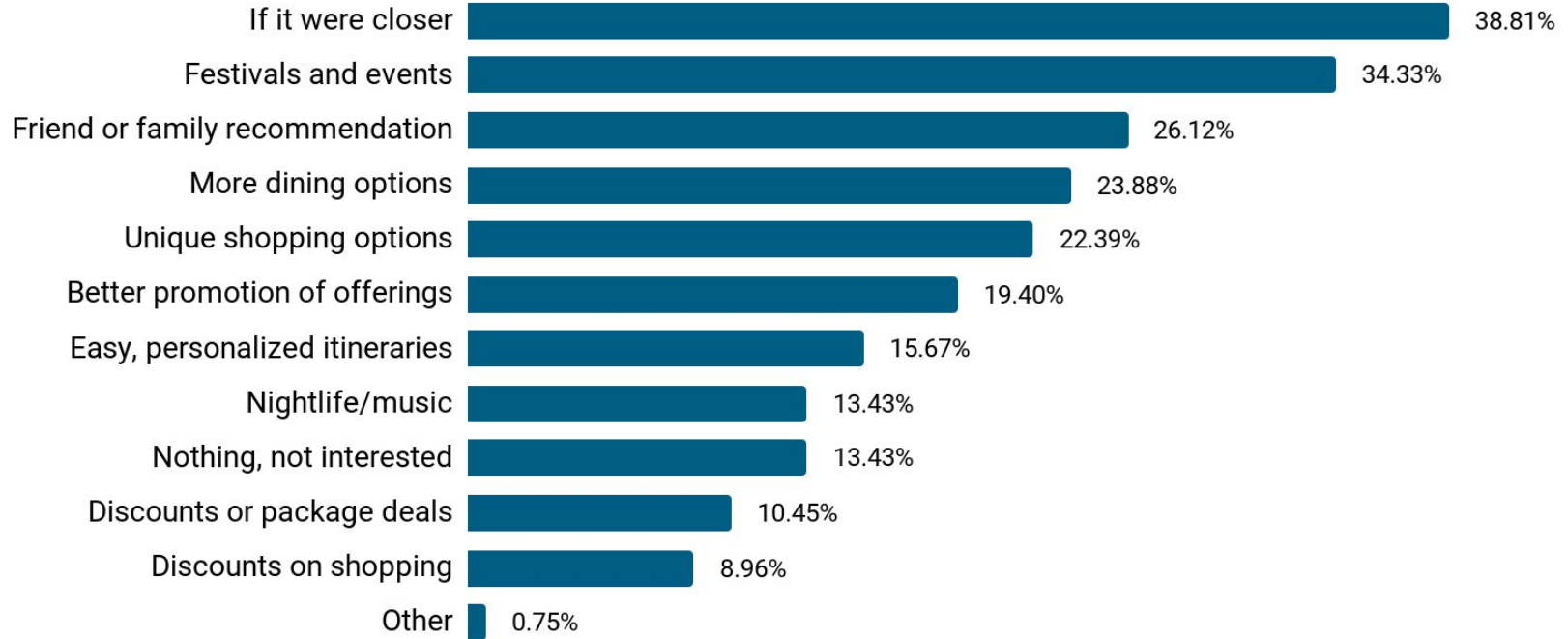
By Study Year, Bottom Half

Why have you not visited Manassas recently?



*The 2020 and 2015 studies each had less than 10 non-visitors who contributed their answers.

In your future travels, what would make you more likely to visit Manassas?
Choose all that apply.

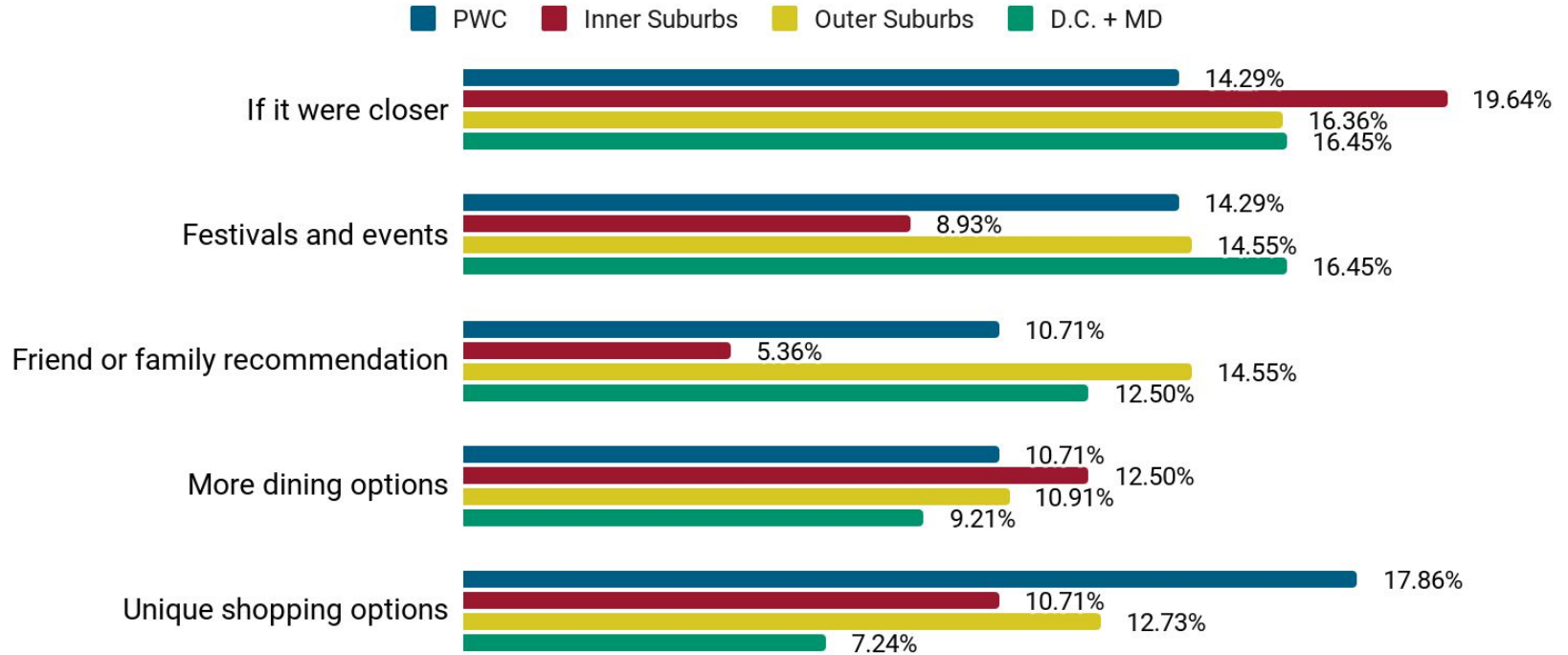


CAP Study

By Market, Top Third

In your future travels, what would make you more likely to visit Manassas?

Choose all that apply.

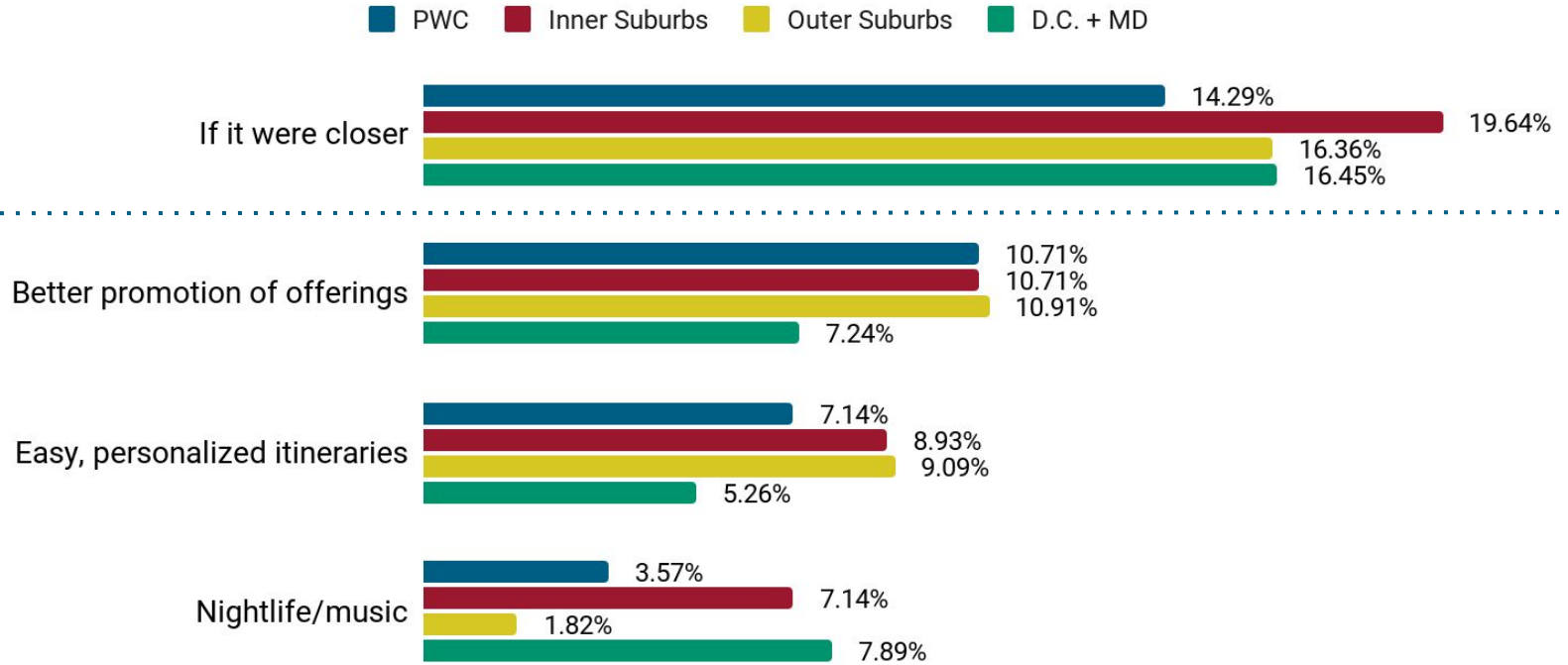


CAP Study

By Market, Middle Third

In your future travels, what would make you more likely to visit Manassas?

Choose all that apply.

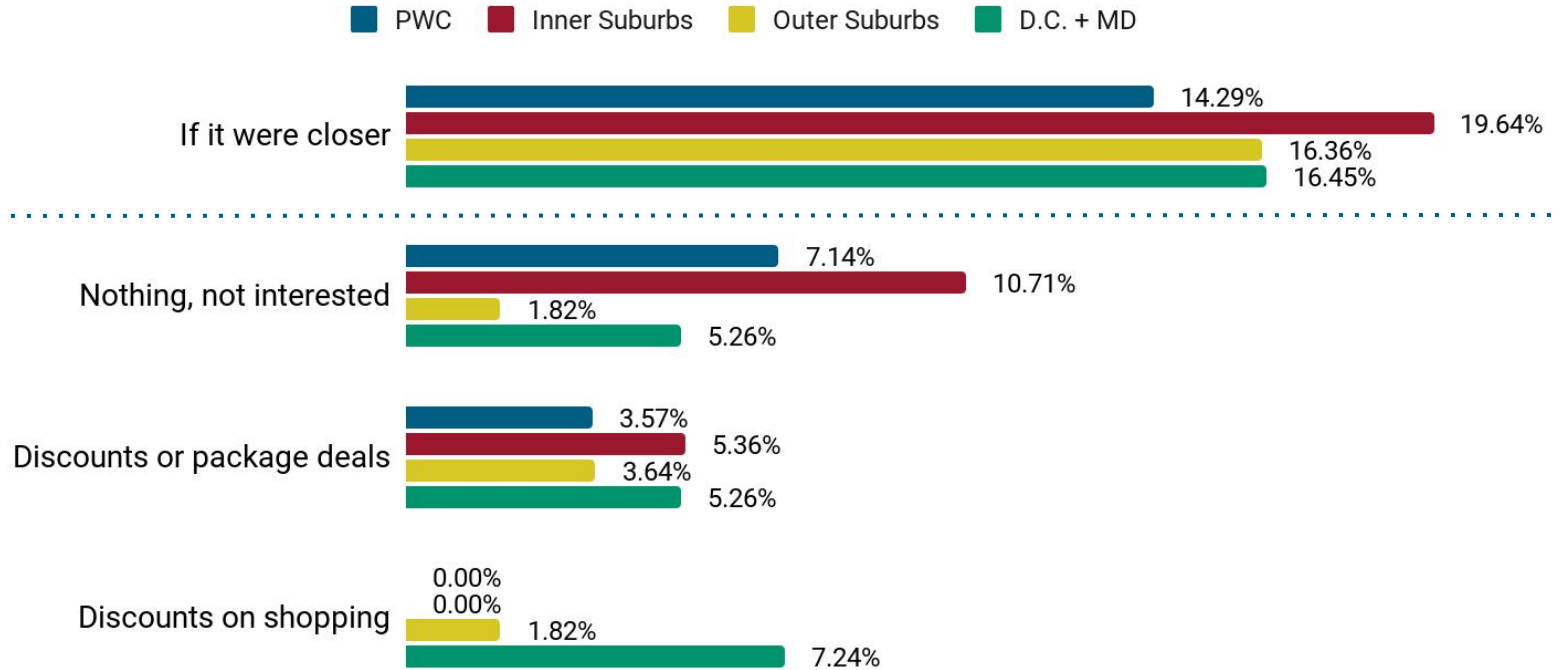


CAP Study

By Market, Bottom Third

In your future travels, what would make you more likely to visit Manassas?

Choose all that apply.

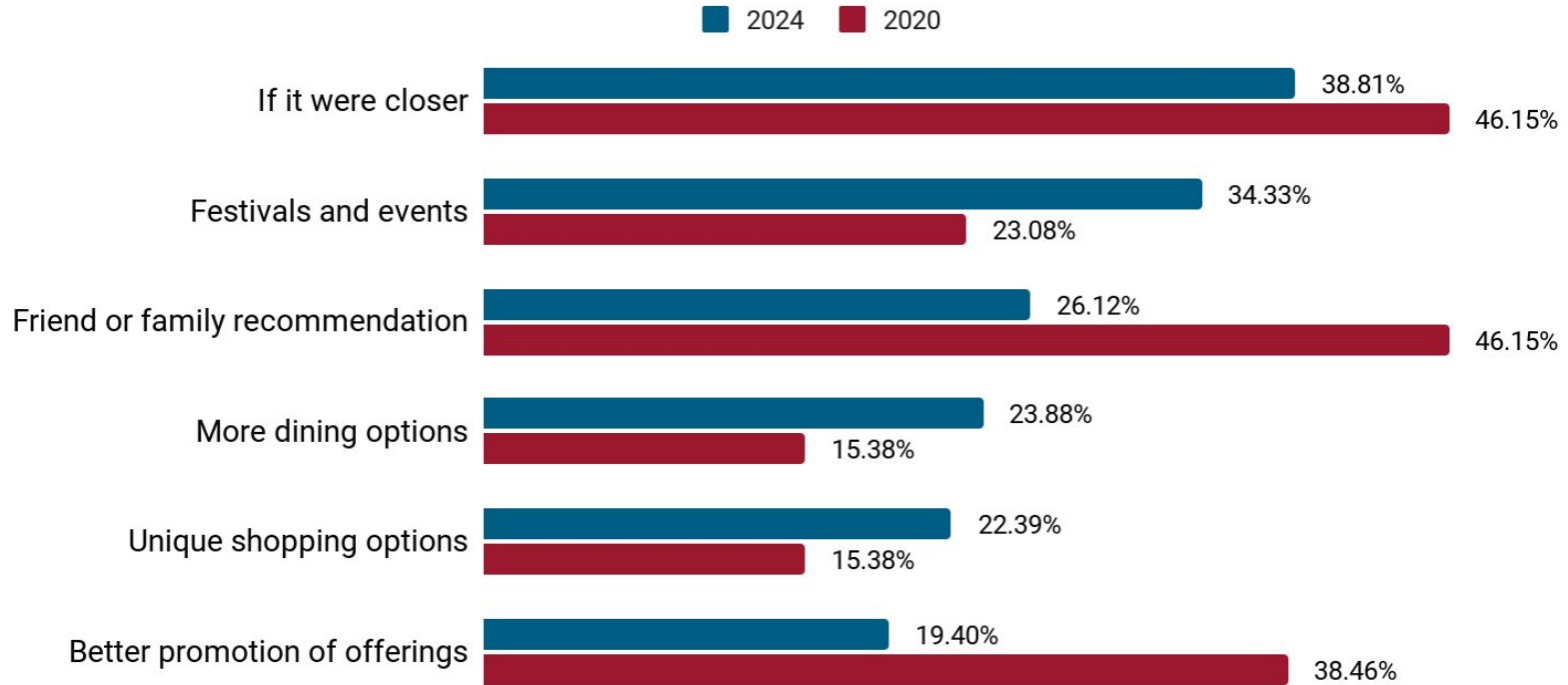


CAP Study

By Study Year, Top Half

In your future travels, what would make you more likely to visit Manassas?

Choose all that apply.



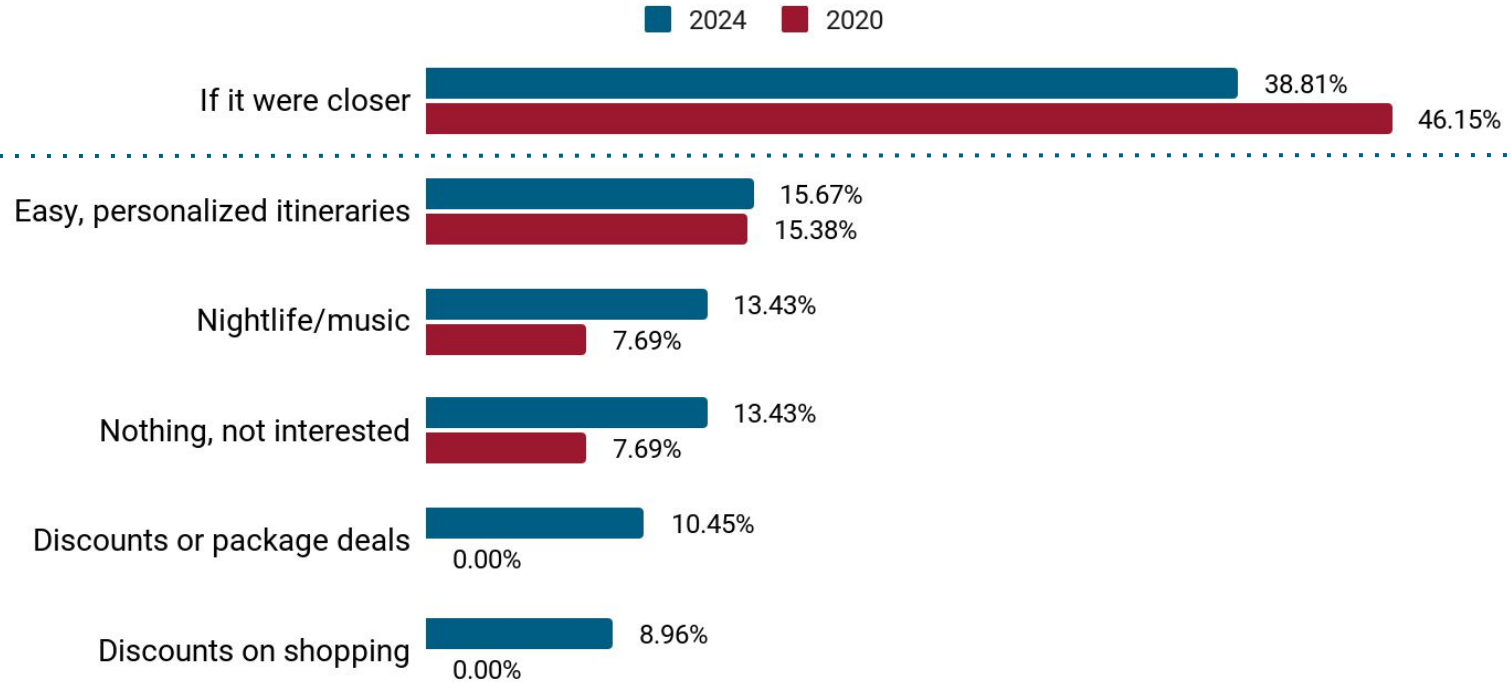
*The 2020 study had less than 10 non-visitors who contributed their answers. This question originated in 2020, so there is no data available for 2015.

CAP Study

By Study Year, Bottom Half

In your future travels, what would make you more likely to visit Manassas?

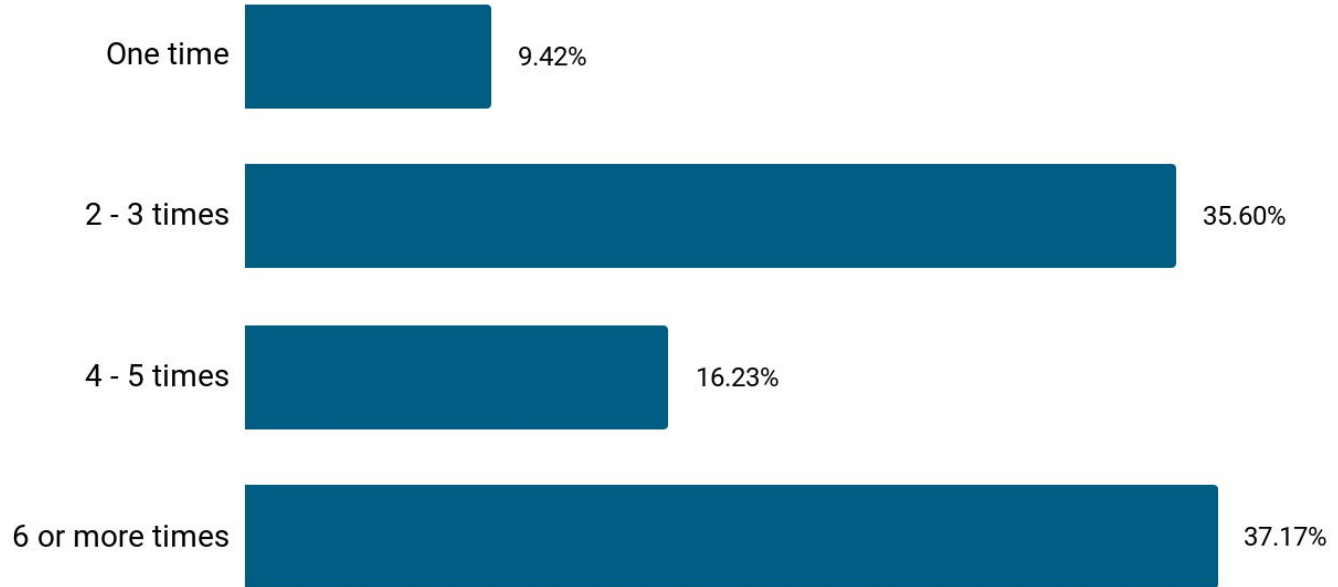
Choose all that apply.



*The 2020 study had less than 10 non-visitors who contributed their answers. This question originated in 2020, so there is no data available for 2015.

Visitors

How many times have you visited Manassas in the past 4 years (since 2020)?

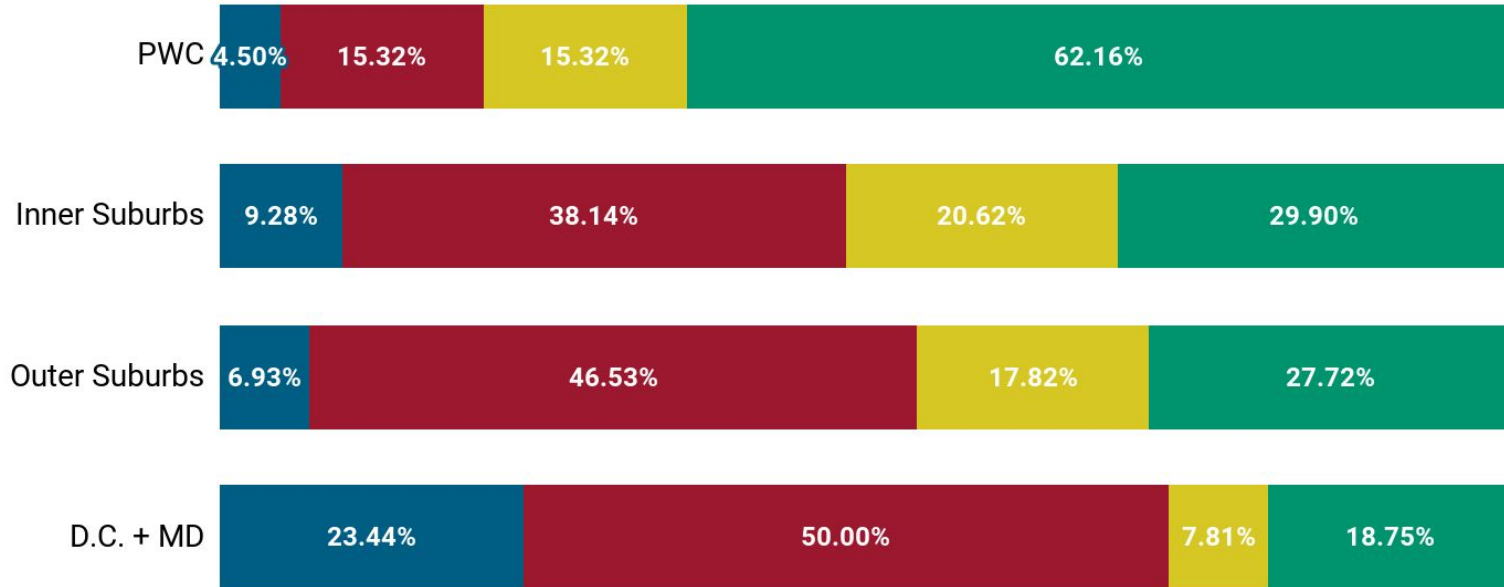


CAP Study

By Market

How many times have you visited Manassas in the past 4 years (since 2020)?

■ One time ■ 2 - 3 times ■ 4 - 5 times ■ 6 or more times



CAP Study

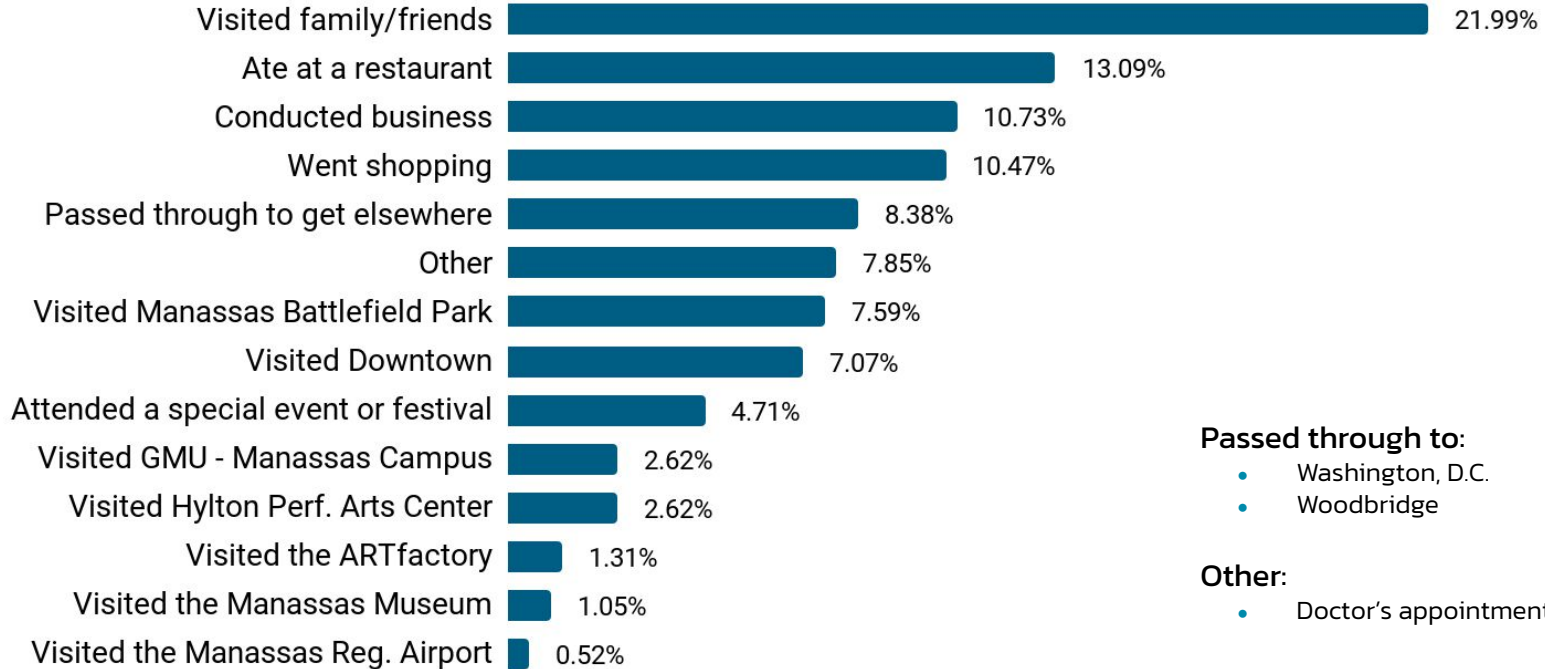
By Study Year

How many times have you visited Manassas in the past 4 years (since 2020)?

■ One time ■ 2 - 3 times ■ 4 - 5 times ■ 6 or more times



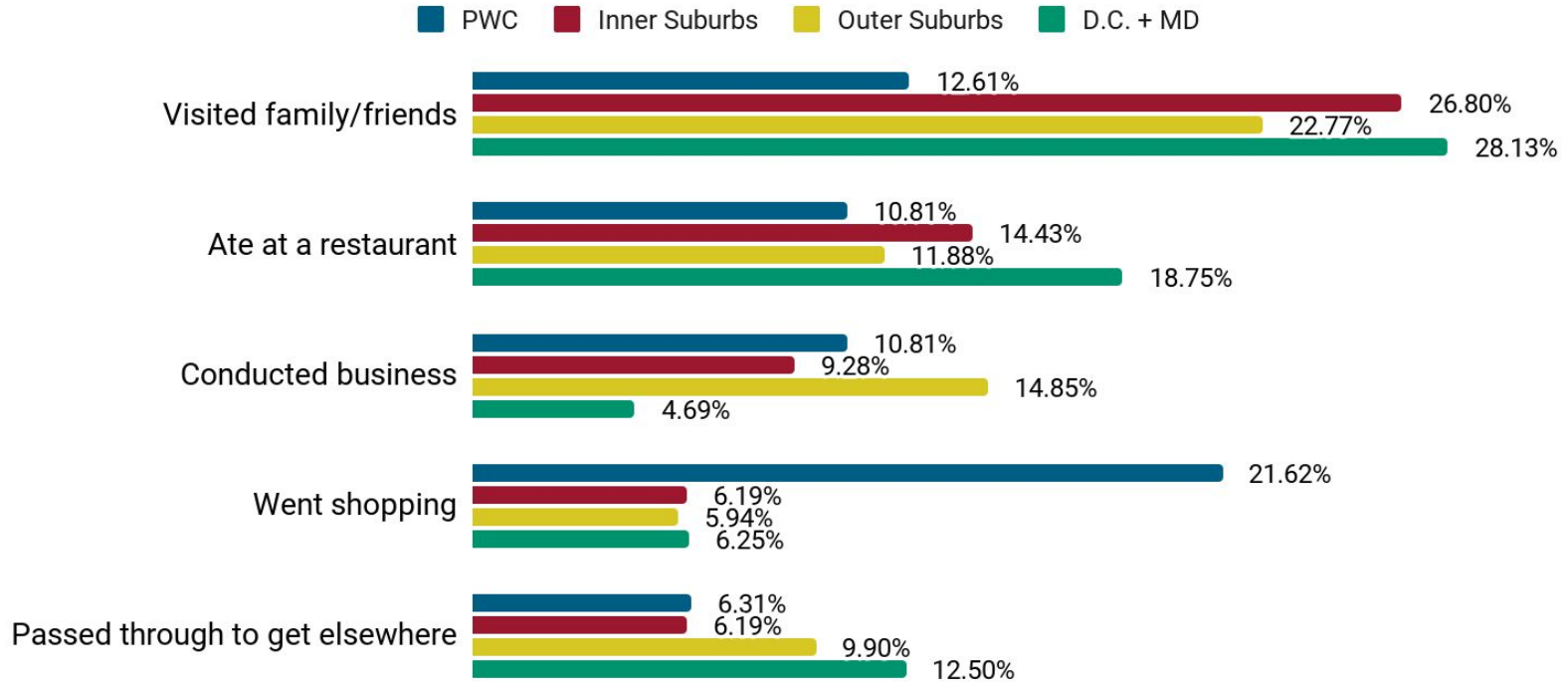
What was the primary purpose or main reason you visited Manassas on your most recent visit?



CAP Study

By Market, Top Third

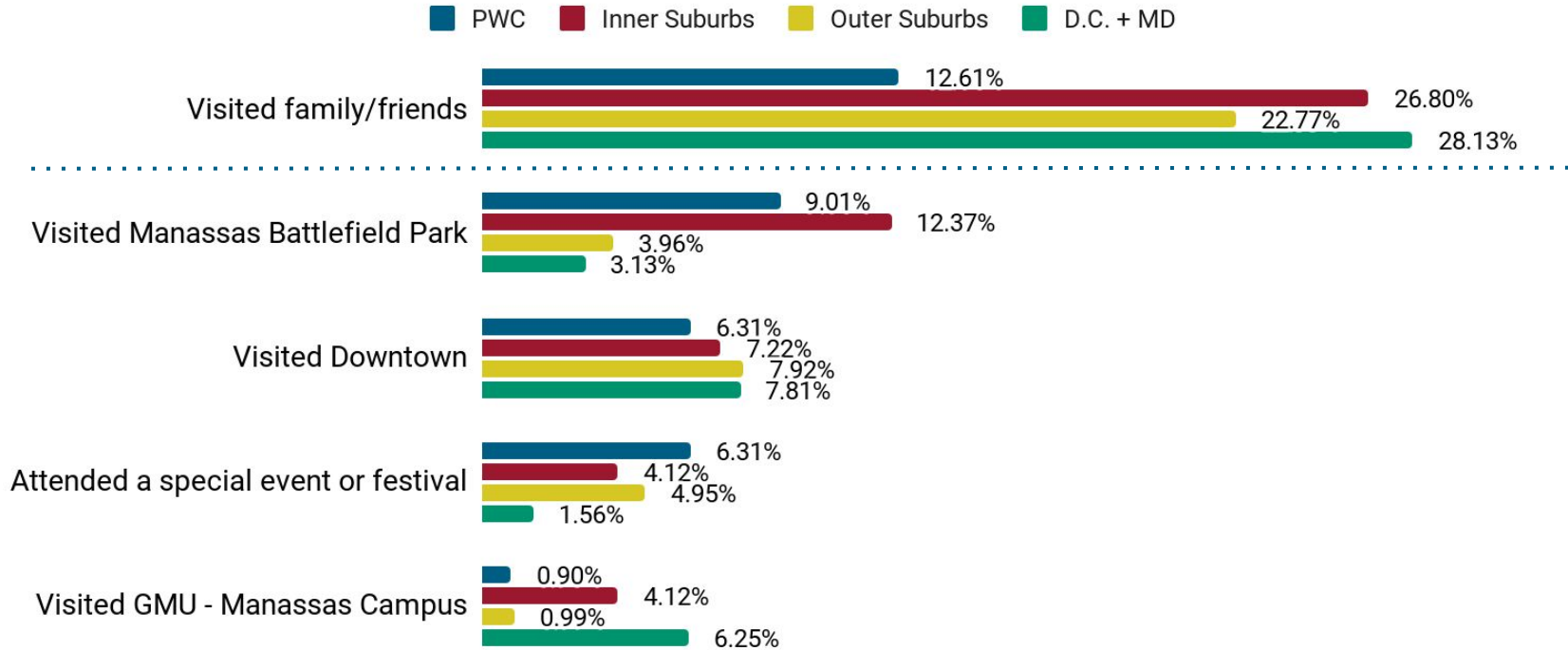
What was the primary purpose or main reason you visited Manassas on your most recent visit?



CAP Study

By Market, Middle Third

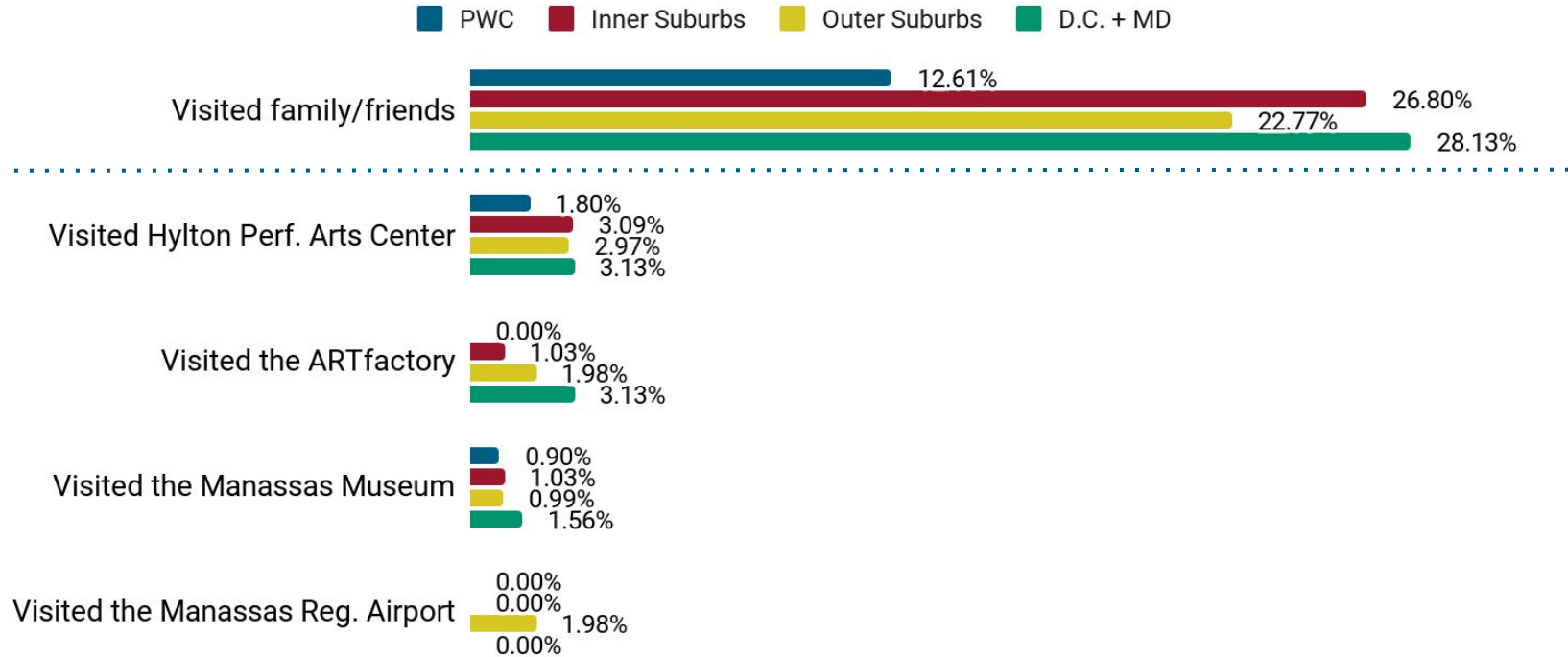
What was the primary purpose or main reason you visited Manassas on your most recent visit?



CAP Study

By Market, Bottom Third

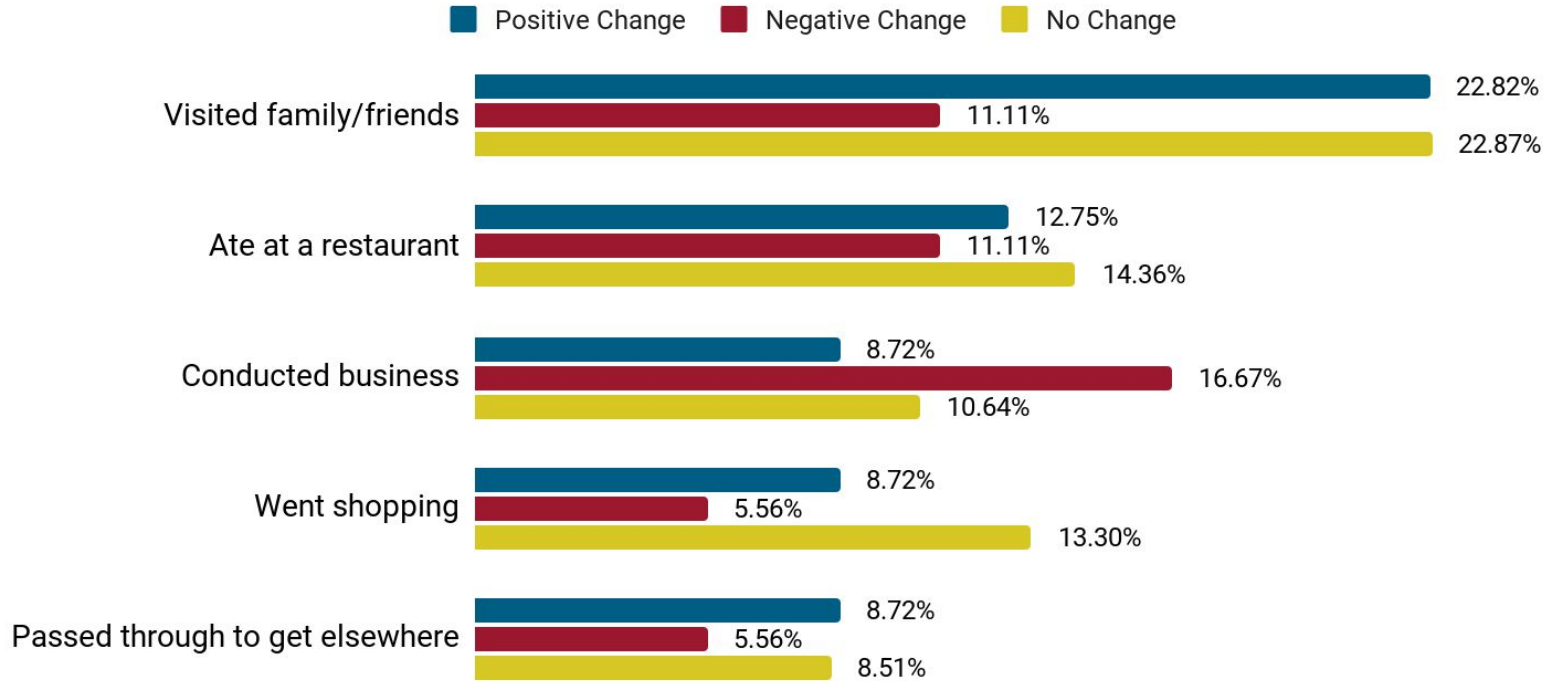
What was the primary purpose or main reason you visited Manassas on your most recent visit?



CAP Study

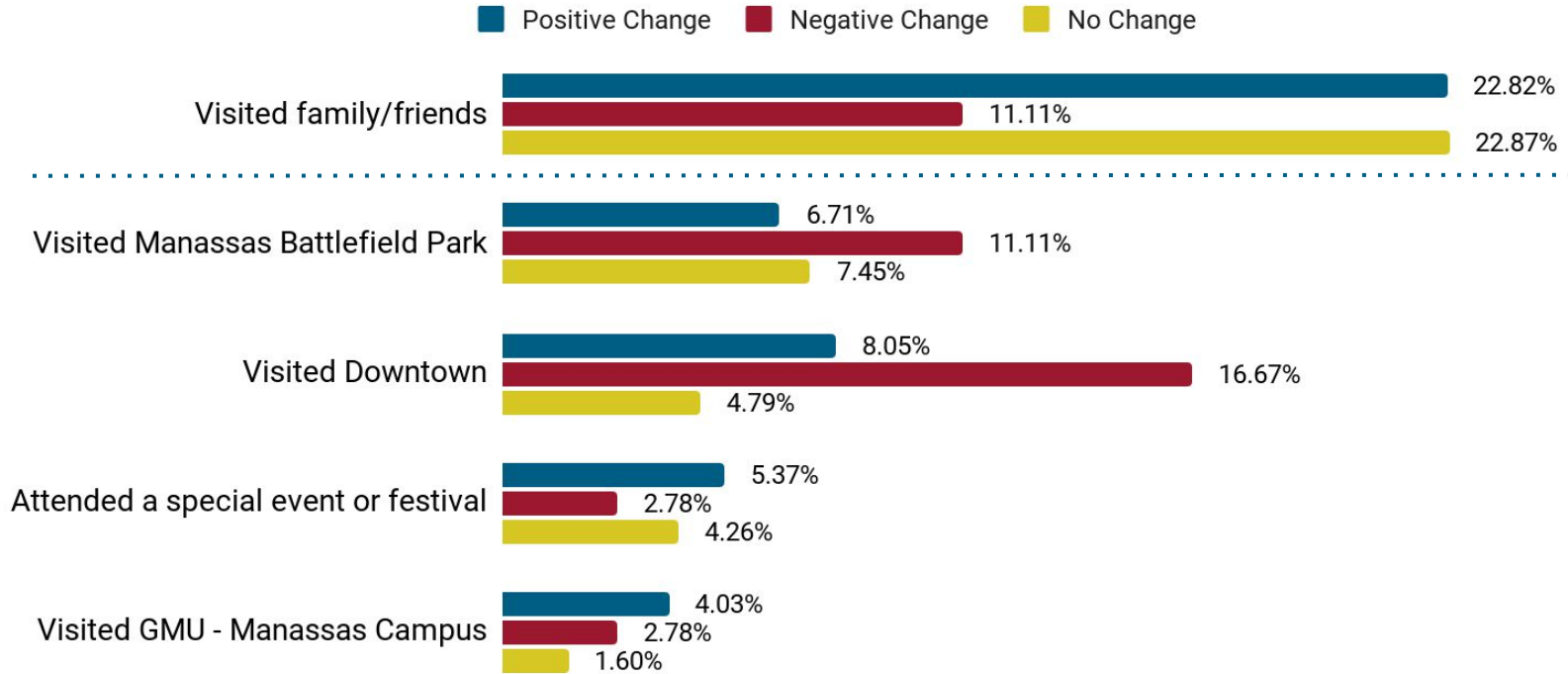
By Change In Perception, Top Third

What was the primary purpose or main reason you visited Manassas on your most recent visit?



By Change In Perception, Middle Third

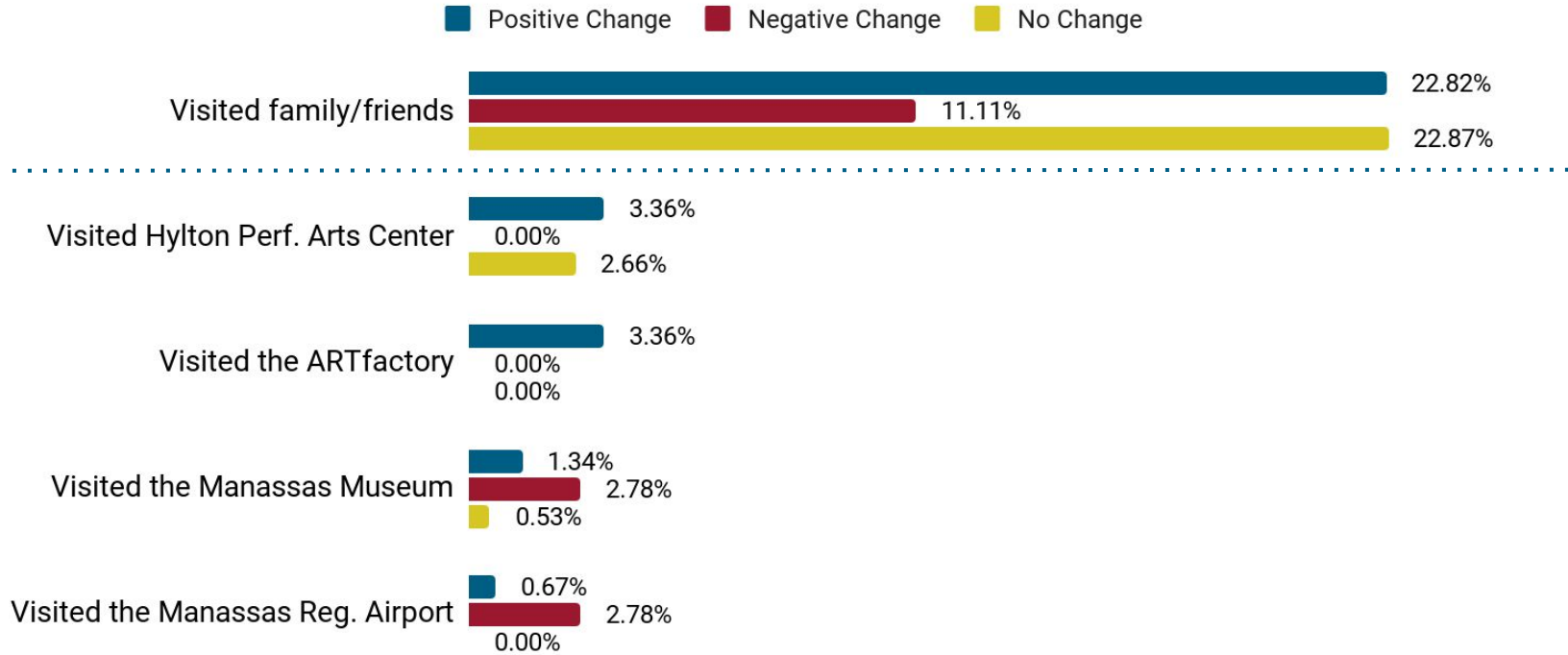
What was the primary purpose or main reason you visited Manassas on your most recent visit?



CAP Study

By Change In Perception, Bottom Third

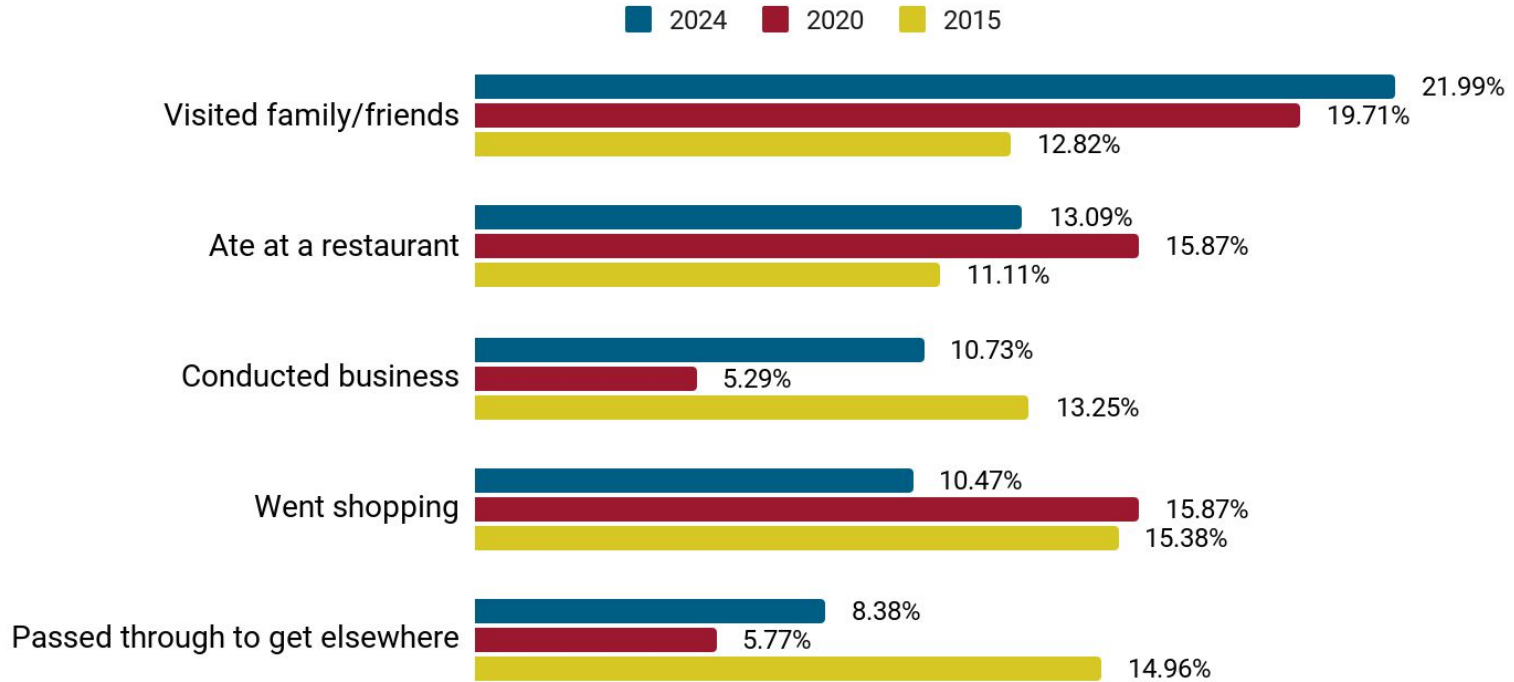
What was the primary purpose or main reason you visited Manassas on your most recent visit?



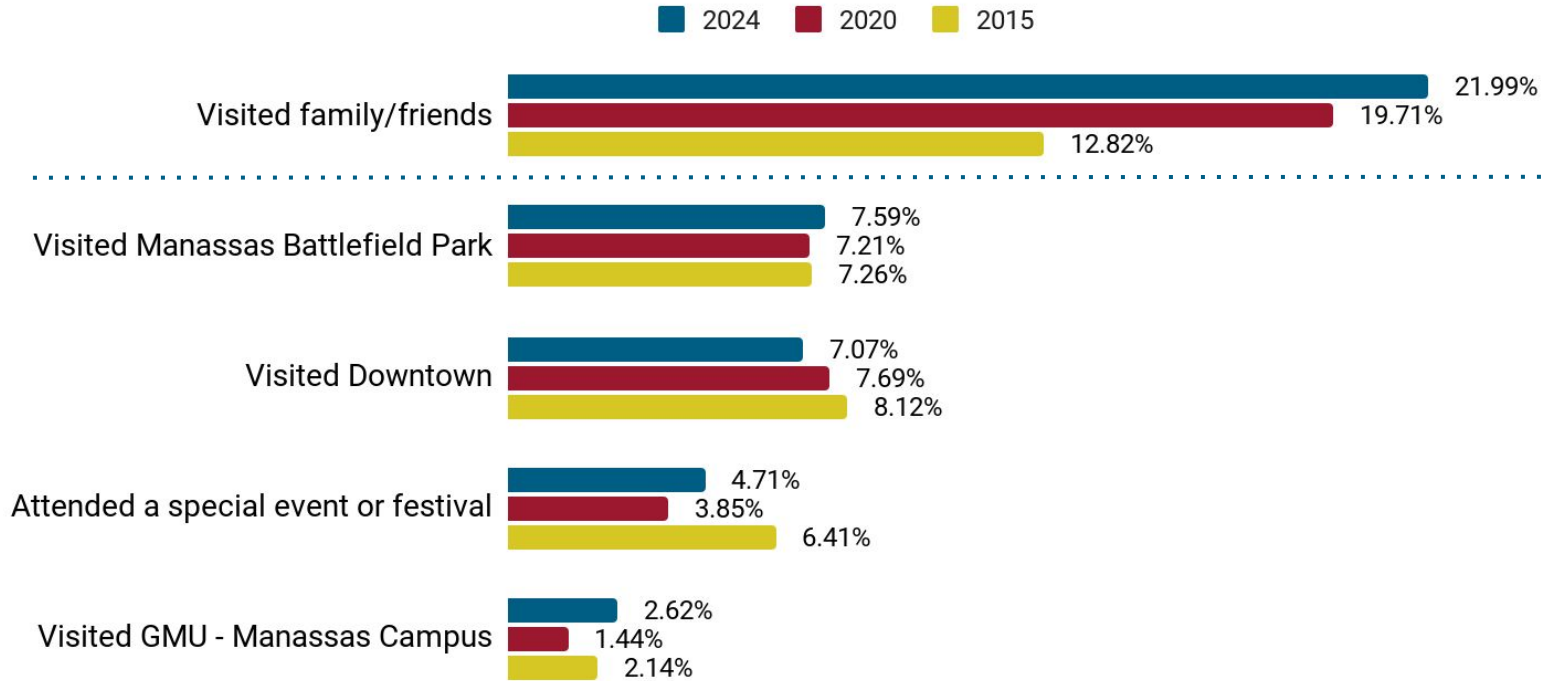
CAP Study

By Study Year, Top Third

What was the primary purpose or main reason you visited Manassas on your most recent visit?



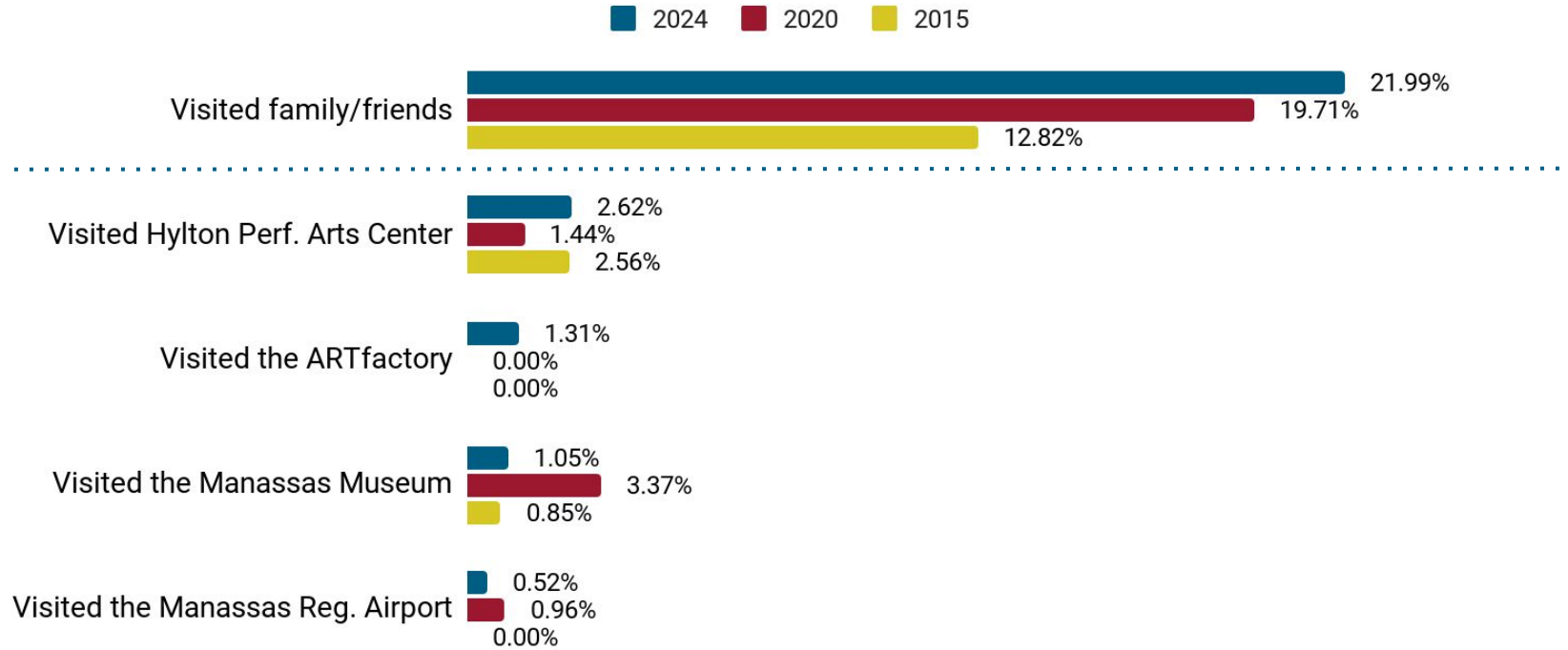
What was the primary purpose or main reason you visited Manassas on your most recent visit?



CAP Study

By Study Year, Bottom Third

What was the primary purpose or main reason you visited Manassas on your most recent visit?



CAP Study

What was your perception of Manassas before your latest visit?

A Variety of Nice Offerings

- *"It is an older historic city in Northern VA, but it is updating itself."*
- *"It has potential. Good companies, cool historical sites, and some good restaurants."*
- *"Diverse community, crowded streets, excellent development"*

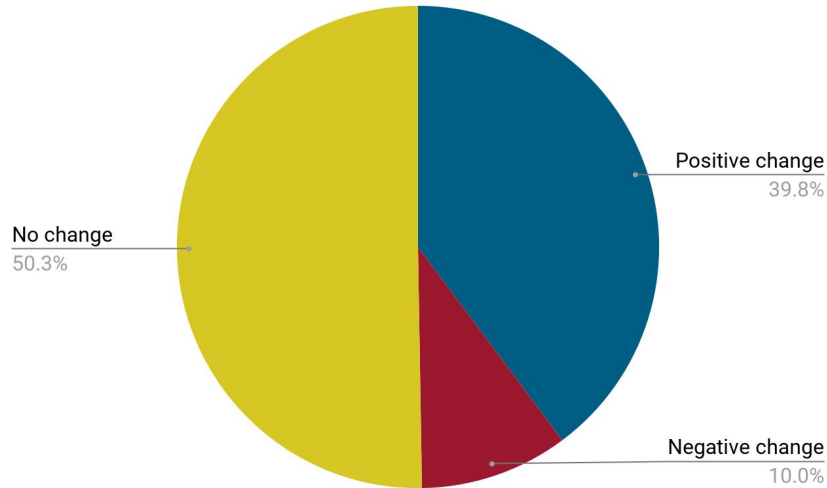
Out of the Way, Sleepy

- *"It was far away and very quiet, not much going on."*
- *"I thought it was more rural than it was."*

Facing Some Challenges

- *"I love the city of Manassas and downtown Manassas. I grew up in Prince William County (Woodbridge), however, I believe the area has gone downhill because of crime."*
- *"It has an immigration problem."*
- *"There are good places to visit and shop but seems to be flooded with more of a population than before. There also seems to be a huge amount of construction of infrastructure going on."*
- *"That it's a lower income area and far from anything I'd want to be close to like healthcare and good businesses."*

Did your perception of Manassas change after your recent visit(s) to the city?



What changed your perception?

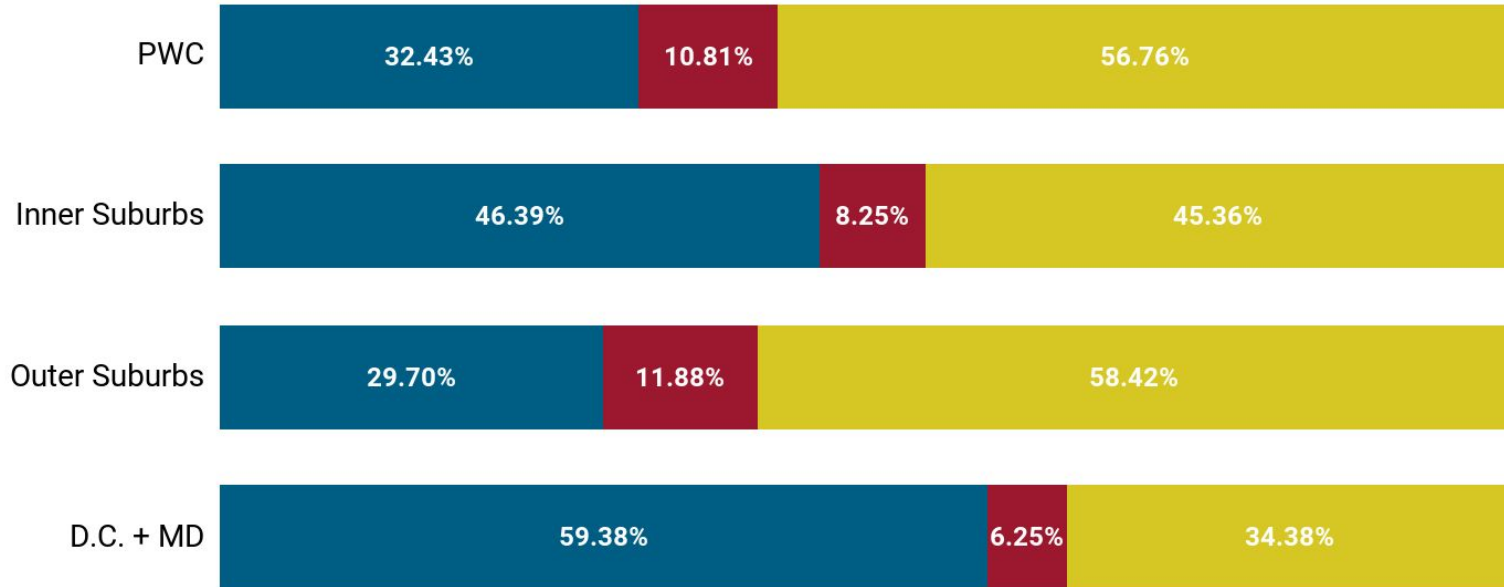
- "Cute little downtown area that I had no idea was there"
- "I'm hearing and seeing evidence of better housing developments, roads, infrastructure improvements and people who will live there."
- "More stores and more restaurants coming in."
- "It's cleaner. Not as many strip malls. Well-tended larger shopping centers. Overall look of progress."
- "The level of development and cultural diversity"
- "I saw that they were building things up and making it more desirable to be there."
- "Just the overall atmosphere. It's not safe like it used to be."
- "It just got too crowded. Traffic was horrendous."

CAP Study

By Market

Did your perception of Manassas change after your recent visit(s) to the city?

■ Positive Change ■ Negative Change ■ No Change

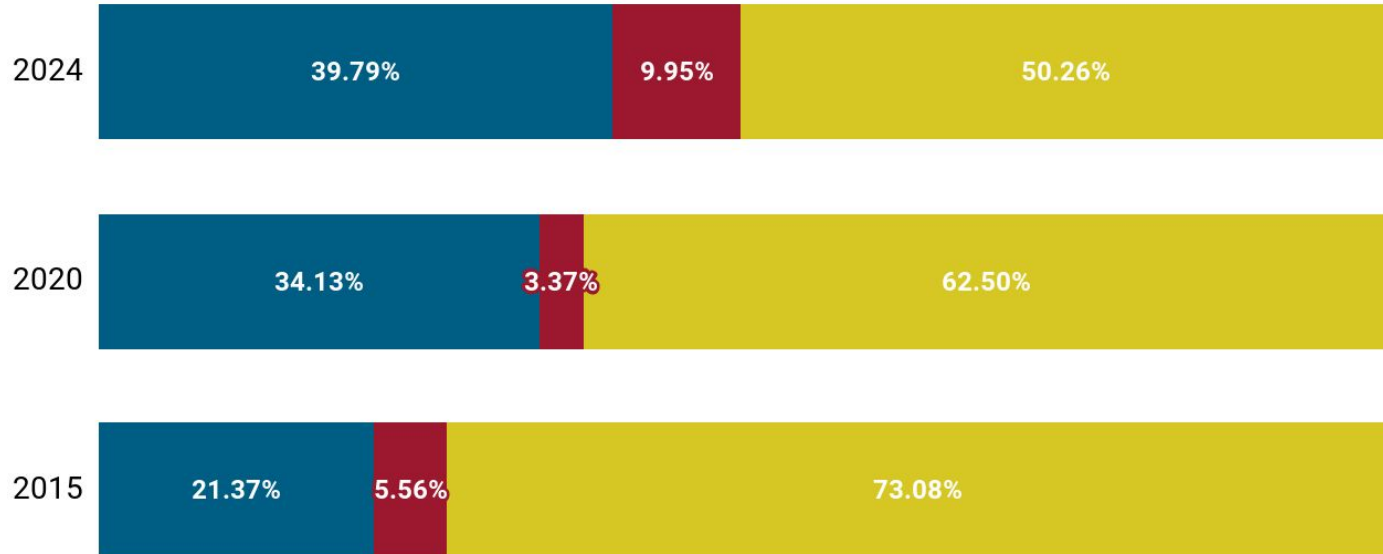


CAP Study

By Study Year

Did your perception of Manassas change after your recent visit(s) to the city?

■ Positive Change ■ Negative Change ■ No Change



What aspect of Manassas leaves the most **positive** impression on visitors and newcomers?

- “Probably the downtown area which still has a charm to it and the Manassas Battlefield Park.”
- “The diversity of the area from historic battlefields to high-tech firms”
- “The events that are taking place there. So much fun. A lot of activities for tourists too.”
- “How much Manassas has to offer for all backgrounds and family statuses”
- “It’s near a lot of very beautiful parks, and the land is wonderful. It’s easy to get to as well.”
- “Everything they’ve done to update the city with entertainment, the arts, shopping and historical areas.”
- “The residents are friendly and there are plenty of opportunities to grow your family.”

What aspect of Manassas leaves the most **negative** impression on visitors and newcomers?

- “Highway 28 entrance. Driving through that leaves a very bad impression before you reach downtown.”
- “The crime rate and appearances of the lower income areas where most of the crimes happen”
- “The overflow of new construction takes away from the charm of it all. More buildings than the beauty of the grass and trees.”
- “Some parts feel very run-down. It also feels very rural compared to some other areas”
- “The roads aren’t in a good state to drive on and makes the city look bad.”
- “That it is becoming more expensive to live there.”
- “It’s boring compared to neighboring locations like Fairfax and Alexandria.”

CAP Study

By Study Year

What aspect of Manassas leaves the most **positive** impression on visitors and newcomers?

2015

- “It leaves a positive impression because there is a lot to learn about Manassas. You can learn about the war.”
- “The depth of its historical value brings them there, and they stay because its hospitality and family friendliness.”
- “It has a country feel. The houses don't seem to be on top of each other; it is more affordable. There is a lot of history there.”
- “Old Town is very small and it seems pretty quaint. You can walk around and there are multiple things to do in a short space. There are arts, book stores, and, during the winter, they have an ice skating rink.”

2020

- “The battlefield mainly. A lot for people to do at the battlefield...that's why most people visit”
- “Historical sites! Melting pot of food and cultures.”
- “The quaintness of the Old Town area.”
- “Depends on what part of Manassas they travel through...When you get near Old Town the tree lined streets are very nice and inviting.”
- “Some of the newer housing developments and the historic district are very attractive with good shopping and dining options.”
- “The fact that it does not have the traffic congestion of the close-in suburbs.”

2015

- "I find that it is dirty and there are not any newer stores and a lot of empty storefronts. Also, there is a lot of crime in the George Town South area."
- "It feels like a town struggling with it's own perception. Bad reputation for crime and gangs. Not a place I would feel comfortable living within the limits."
- "It just feels dirty and unsafe."
- "It looks run down in many areas."
- "I cannot speak for others, but the negative aspect for me was the congestion and traffic."
- "No parking and streets hard to get around; traffic."
- "Not enough stores and museums."
- "It's not a spot for young professionals or high tech"

2020

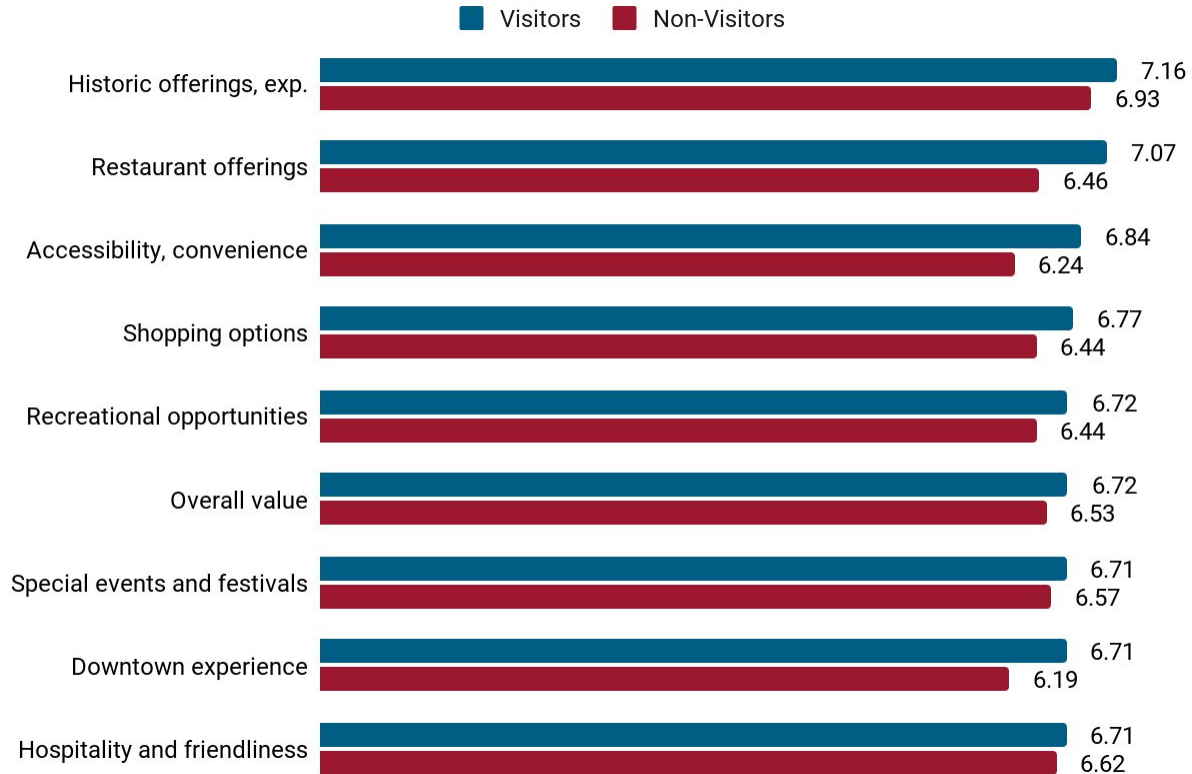
- "Tourist destination built around the battlefield that hasn't figured out how to expand beyond that"
- "Relatively few unique dining options. Lots of chains and low quality American style food."
- "Old buildings in decline."
- "Rundown neighborhoods close to shopping areas"
- "Not as affluent as other cities in the area."
- "The crime rate in Manassas unfortunately."
- "It is very crowded and always busy."
- "Traffic, it's a nightmare to try to drive there from anywhere."
- "Need a car to drive around to different places; Kinda redneck, rough town really"

All Respondents

CAP Study

By Visitation, Top Half

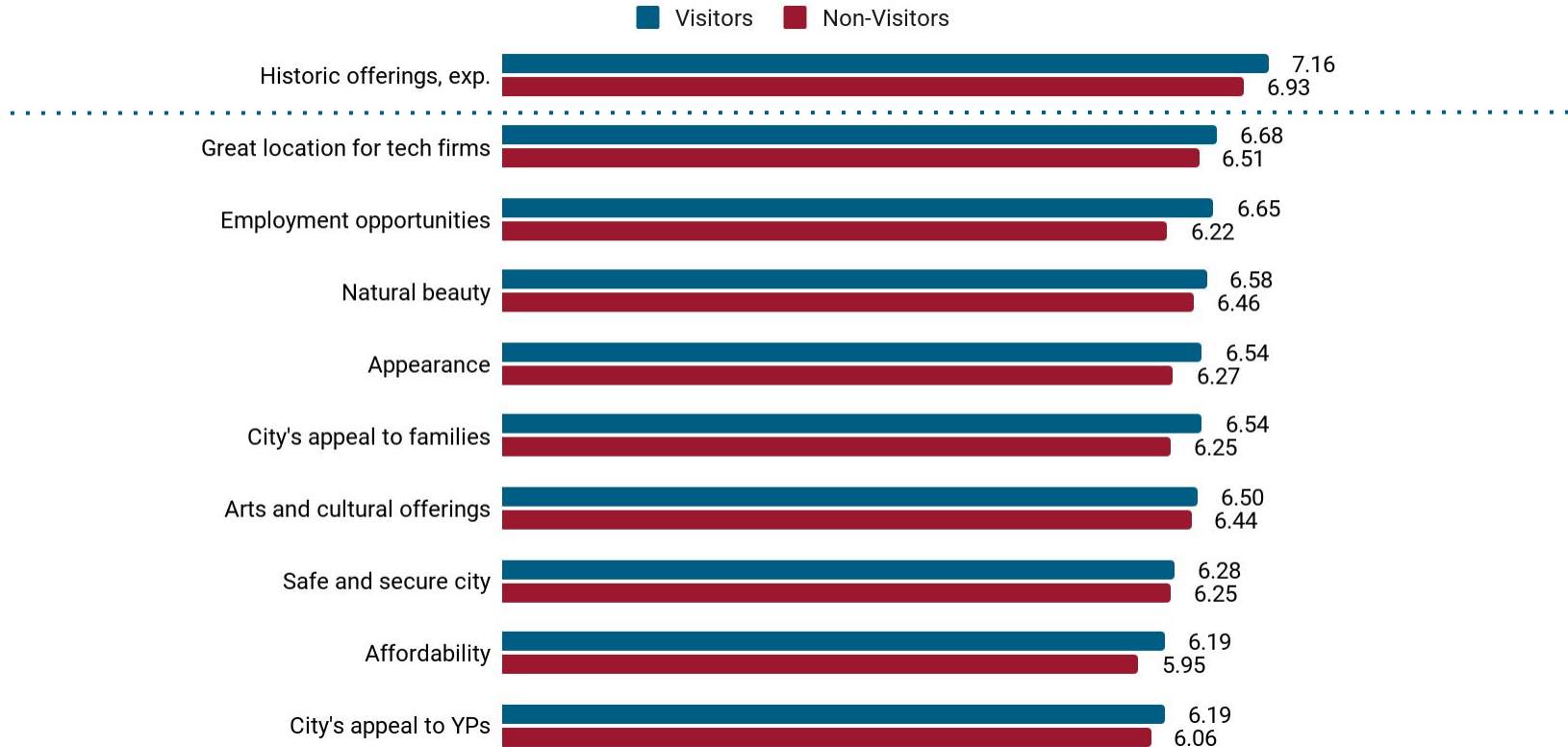
Based on your perception of or experience in Manassas, in your opinion, please rate its following attributes on a scale of 1-10, where 1 is "Poor" and 10 is "Excellent."



CAP Study

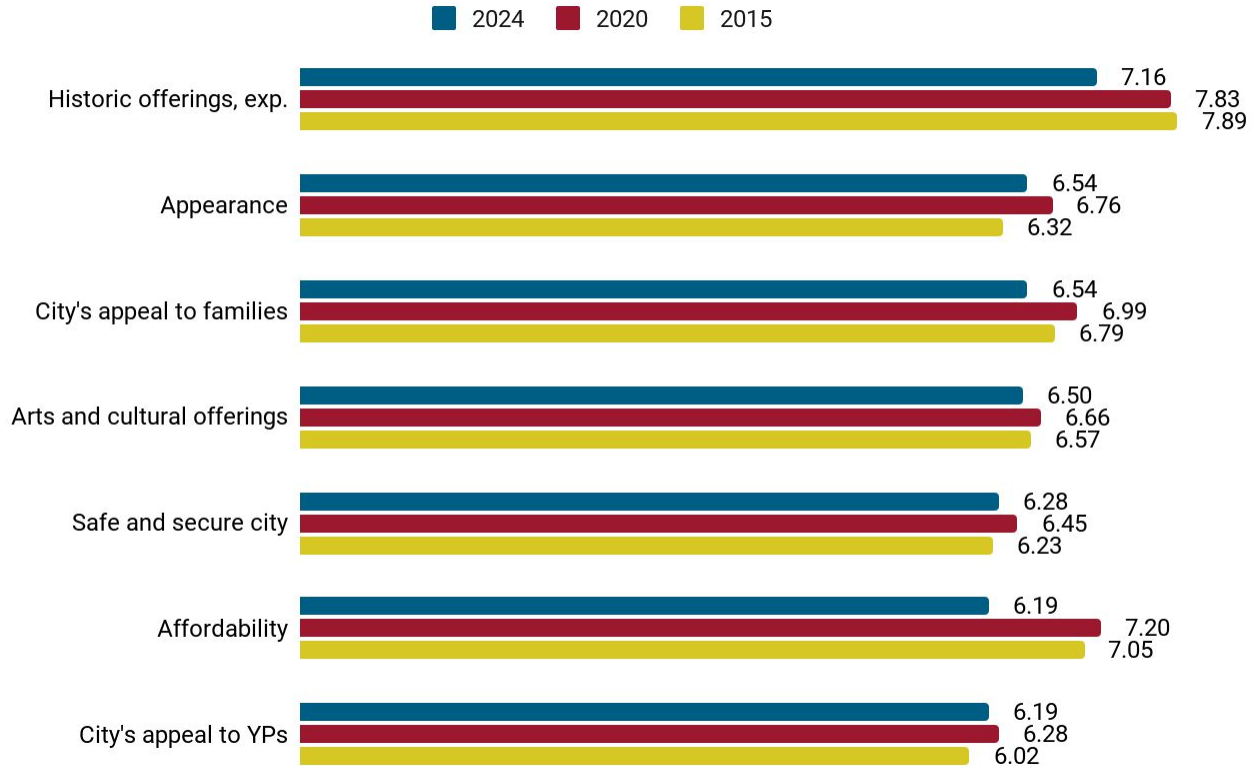
By Visitation, Bottom Half

Based on your perception of or experience in Manassas, in your opinion, please rate its following attributes on a scale of 1-10, where 1 is "Poor" and 10 is "Excellent."



Visitors Only, By Study Year, Top Third

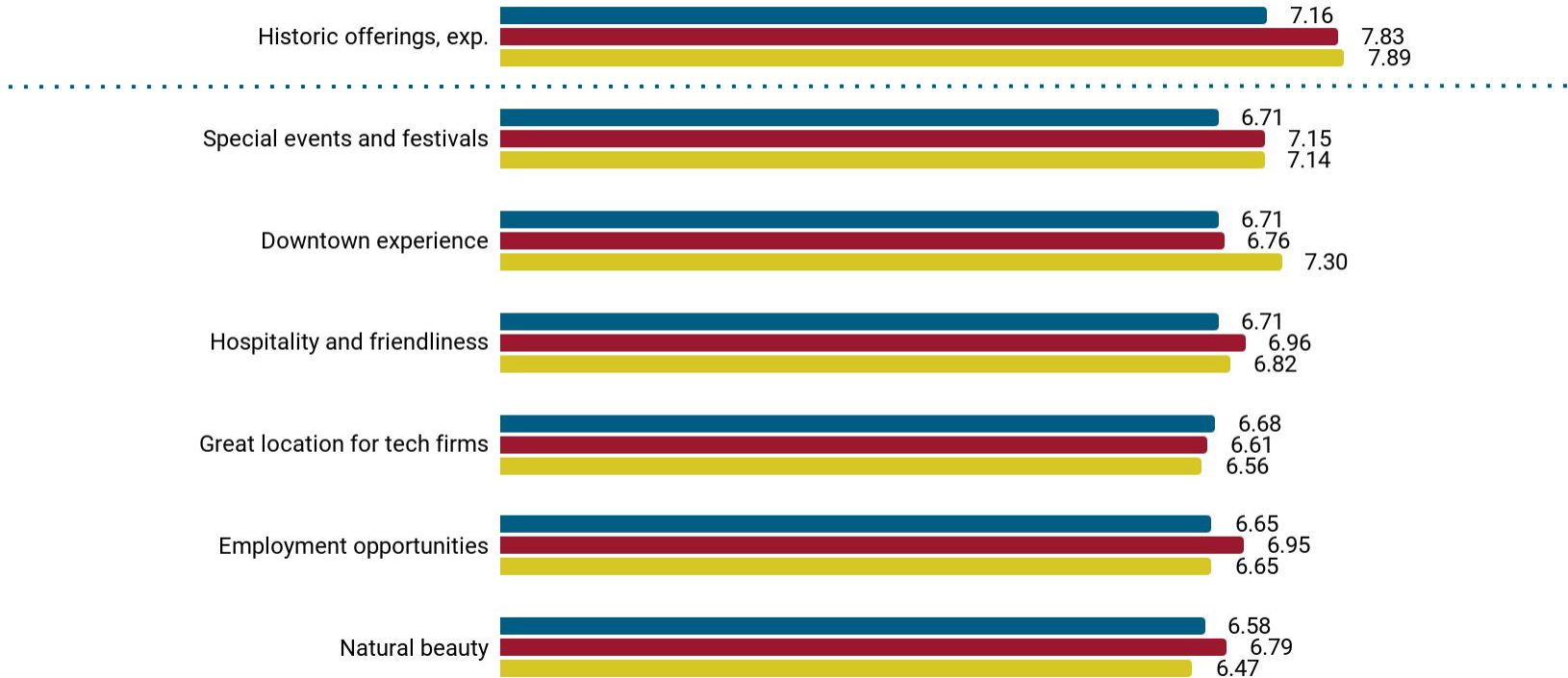
Based on your perception of or experience in Manassas, in your opinion, please rate its following attributes on a scale of 1-10, where 1 is "Poor" and 10 is "Excellent."



Visitors Only, By Study Year, Middle Third

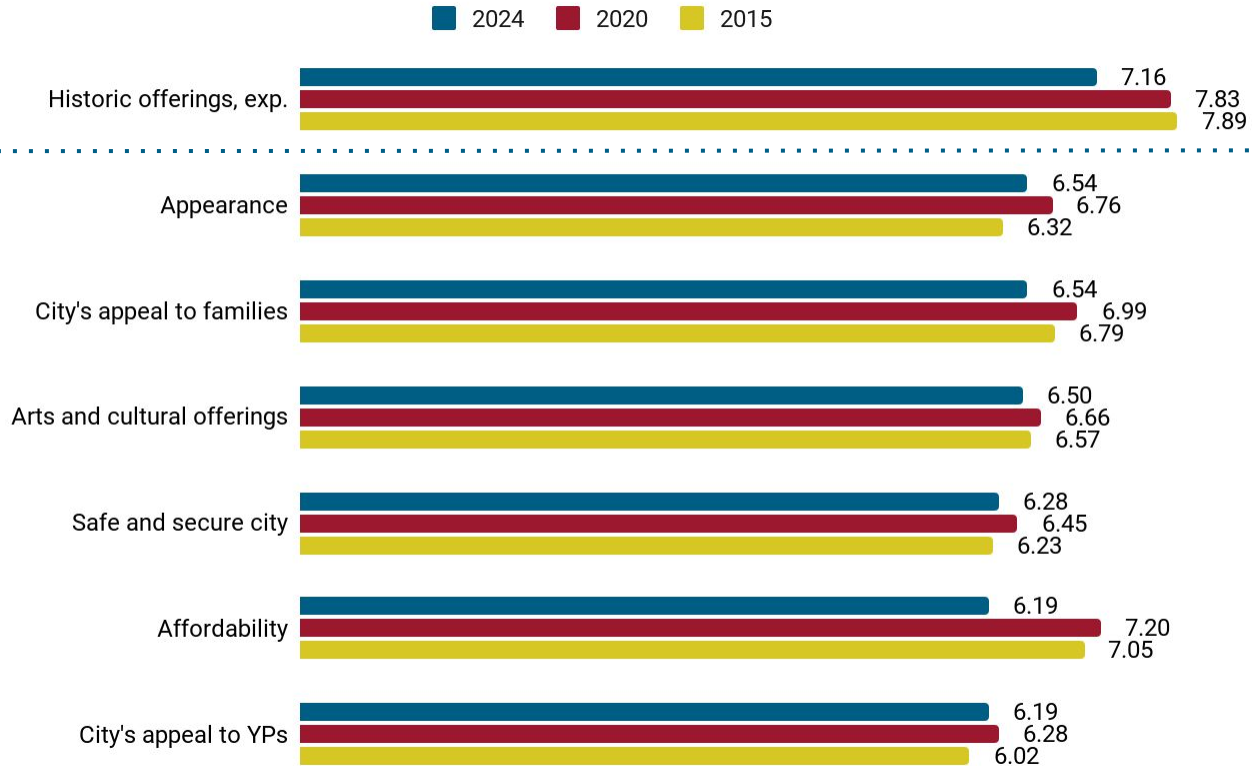
Based on your perception of or experience in Manassas, in your opinion, please rate its following attributes on a scale of 1-10, where 1 is "Poor" and 10 is "Excellent."

2024 2020 2015



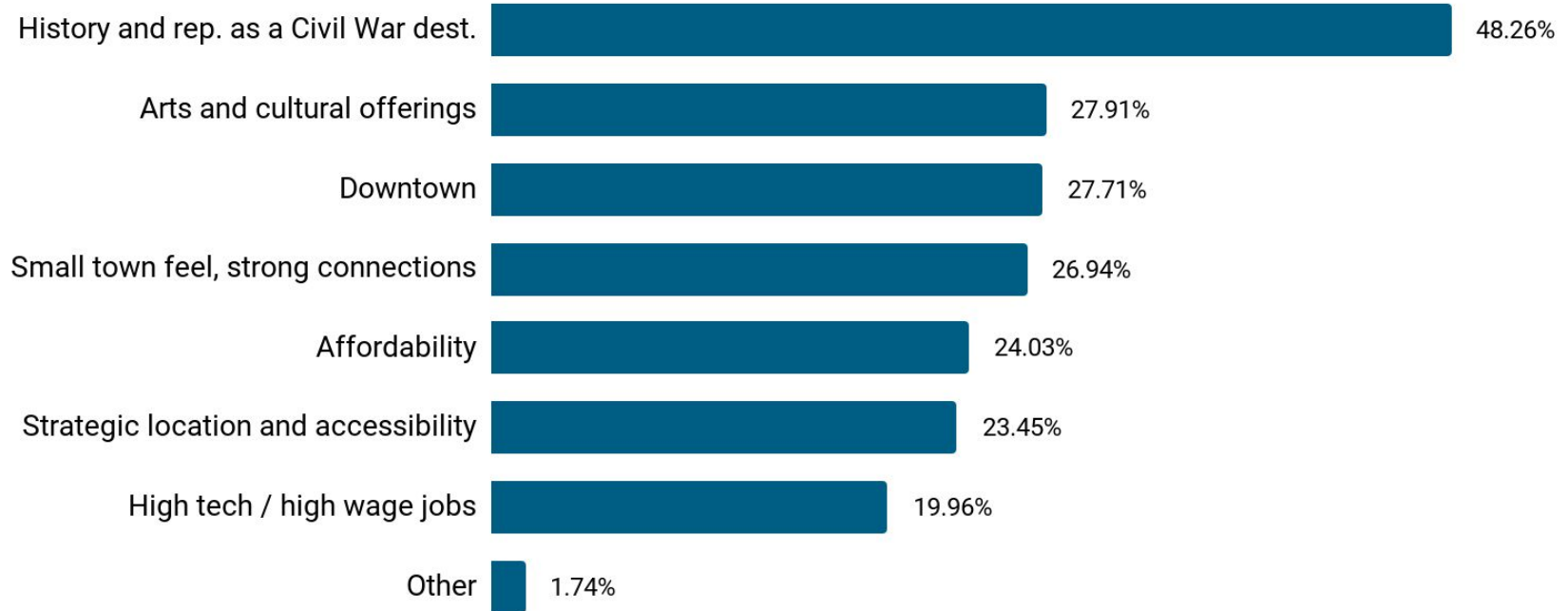
Visitors Only, By Study Year, Bottom Third

Based on your perception of or experience in Manassas, in your opinion, please rate its following attributes on a scale of 1-10, where 1 is "Poor" and 10 is "Excellent."



CAP Study

Of the options below, which is the most important to the identity and reputation of Manassas?
Choose two answers.



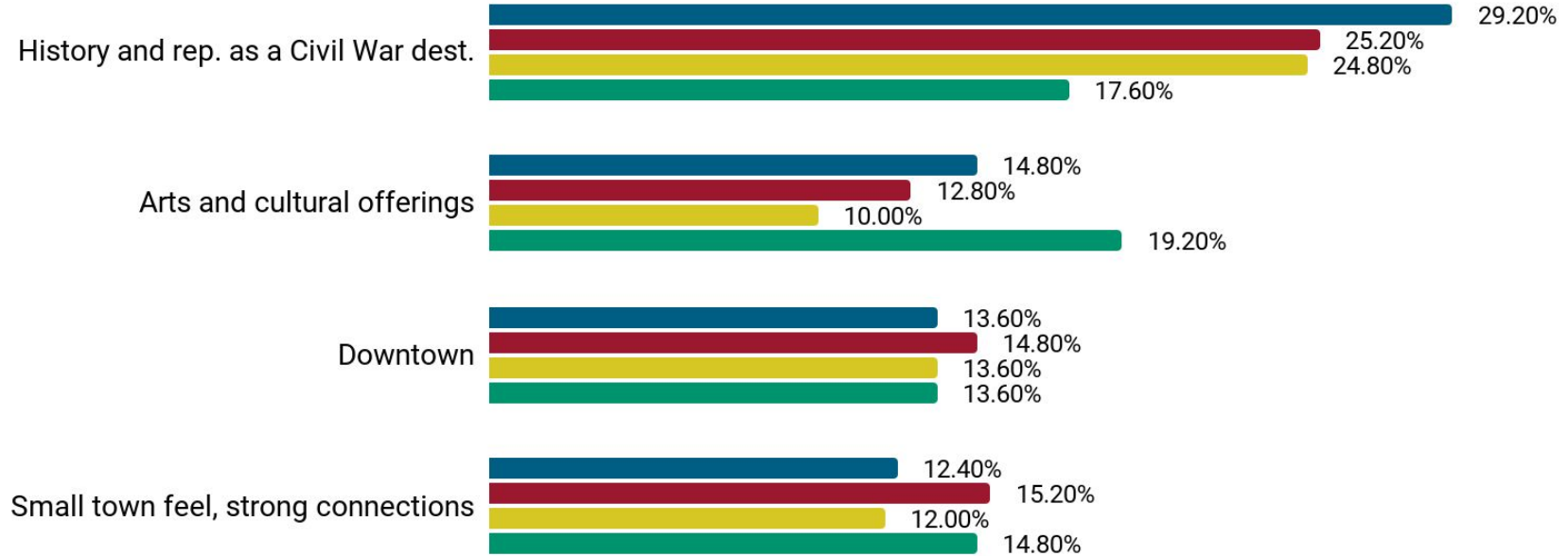
CAP Study

By Market, Top Half

Of the options below, which is the most important to the identity and reputation of Manassas?

Choose two answers.

■ PWC ■ Inner Suburbs ■ Outer Suburbs ■ D.C. + MD



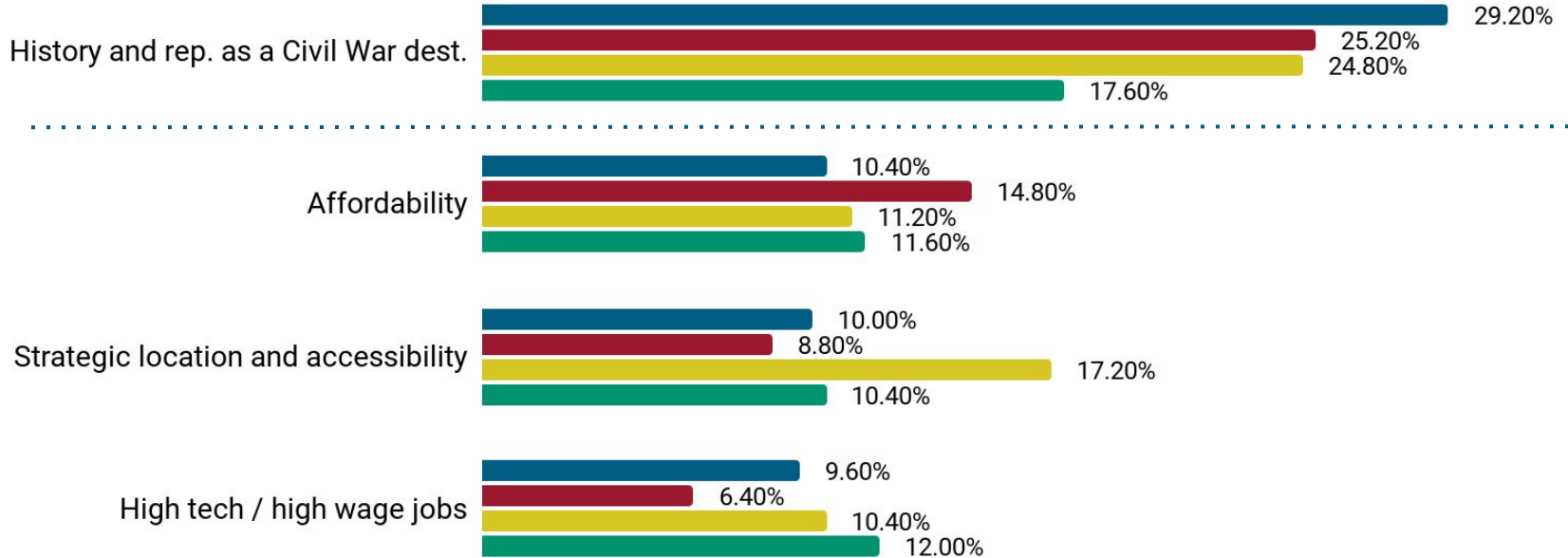
CAP Study

By Market, Bottom Half

Of the options below, which is the most important to the identity and reputation of Manassas?

Choose two answers.

■ PWC ■ Inner Suburbs ■ Outer Suburbs ■ D.C. + MD



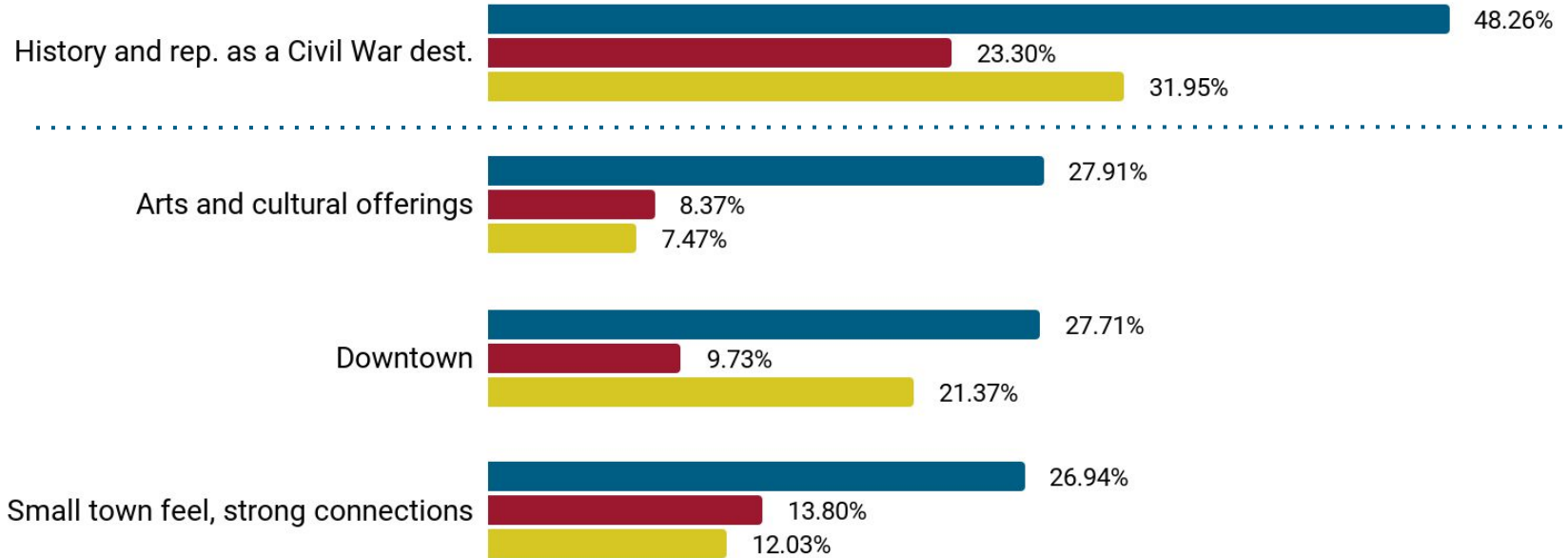
CAP Study

By Study Year, Top Half

Of the options below, which is the most important to the identity and reputation of Manassas?

Choose two answers.

■ 2024 ■ 2020 ■ 2015

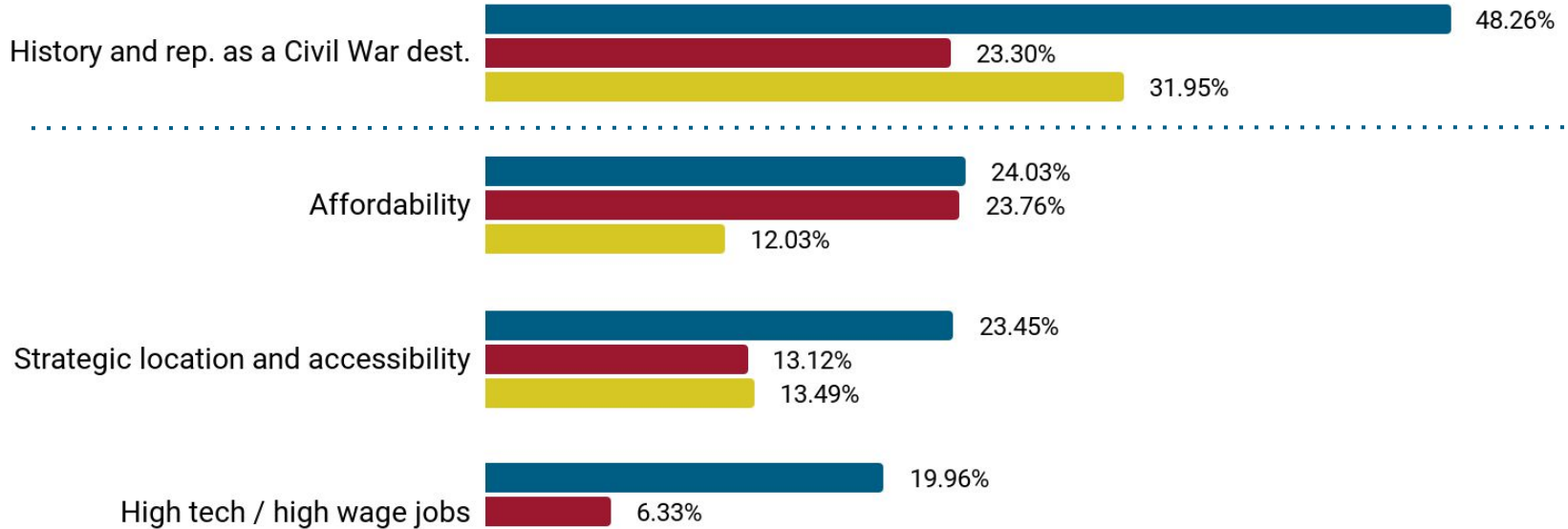


By Study Year, Bottom Half

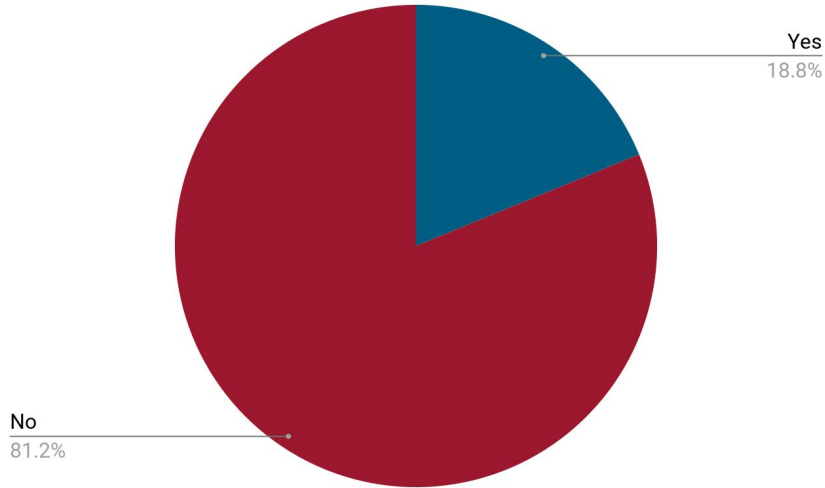
Of the options below, which is the most important to the identity and reputation of Manassas?

Choose two answers.

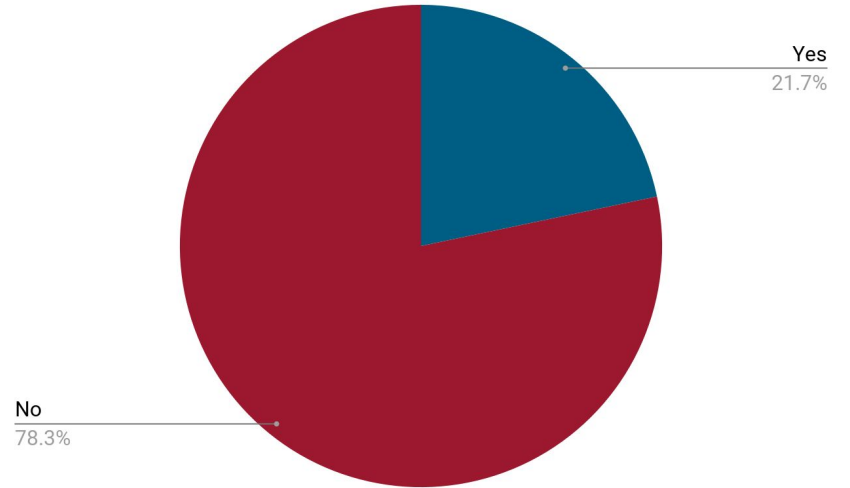
■ 2024 ■ 2020 ■ 2015



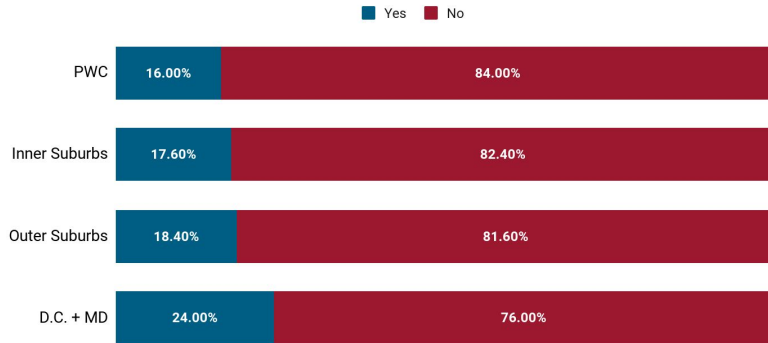
Have you ever read or received an issue of the economic development e-newsletter for the City of Manassas—
"The Business Beat"?



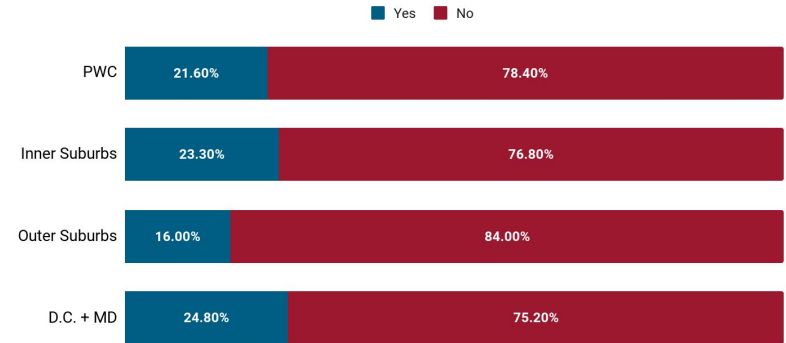
Have you ever visited or interacted with the Facebook page for the City of Manassas Department of Economic Development?



Have you ever read or received an issue of the economic development e-newsletter for the City of Manassas—
“The Business Beat”?



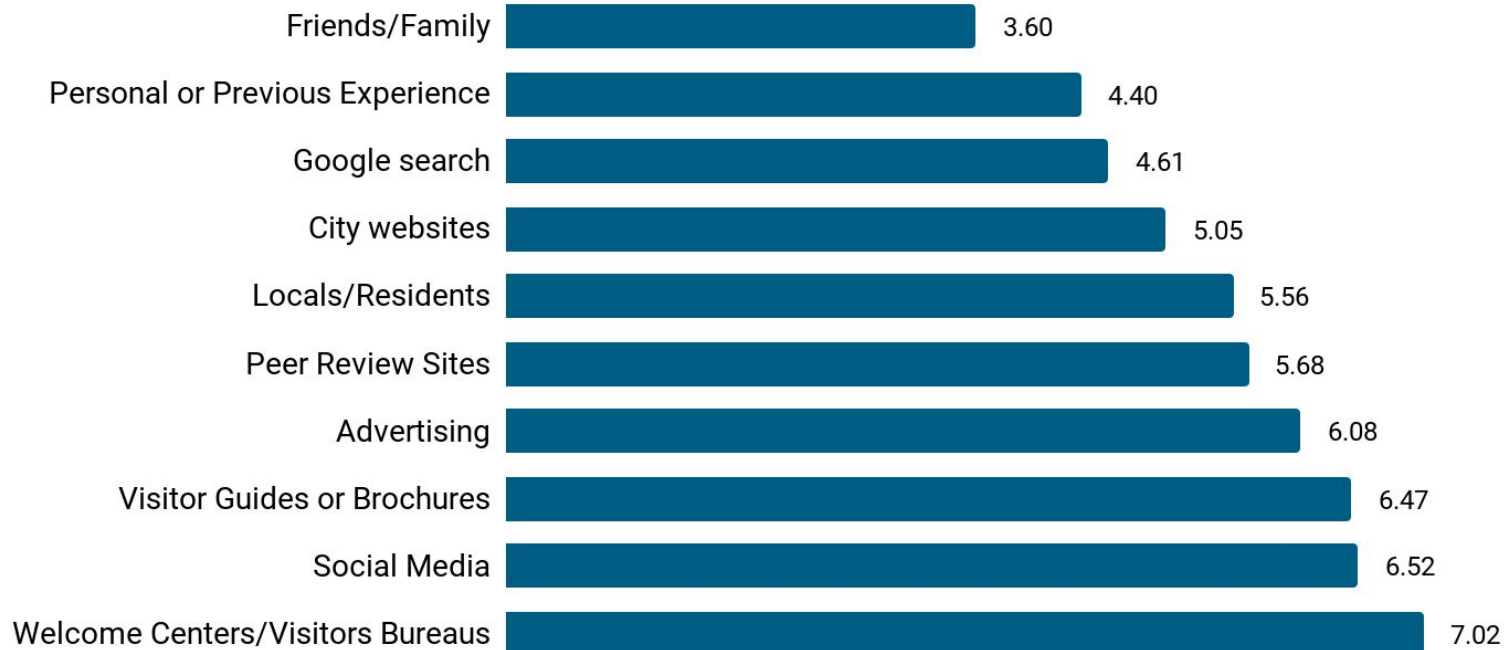
Have you ever visited or interacted with the Facebook page for
the City of Manassas Department of Economic Development?



CAP Study

Which of the following sources of information are most influential when you are planning a leisure trip or vacation? Rank the sources below, with 1 being "most important" and 10 being "least important".

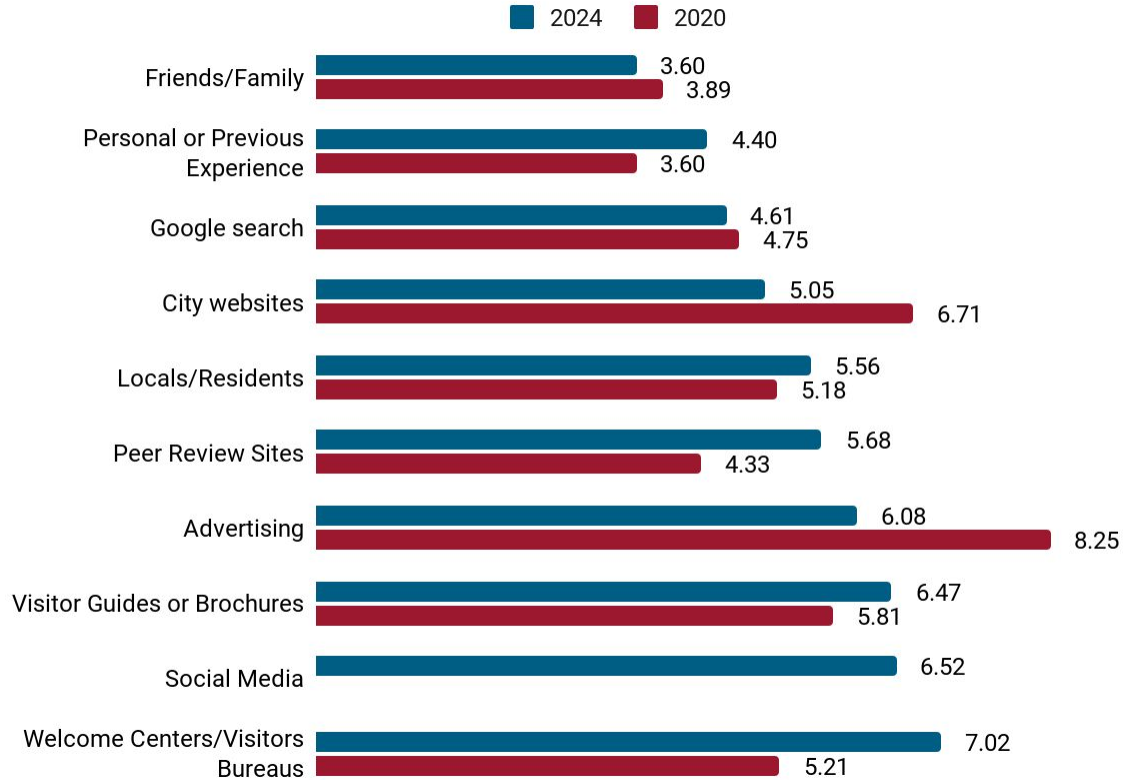
Average ranking (closest to 1 is best)



CAP Study

By Study Year

Which of the following sources of information are most influential when you are planning a leisure trip or vacation? Rank the sources below, with 1 being "most important" and 10 being "least important".



CAP Study

KEY FINDINGS

Like the 2024 Community Survey, the latest vintage of the CAP Study demonstrates consistency along with a few small gains. Given that this year introduced two new markets, this observation is all the more surprising. It appears, however, that Manassas and Prince William County have a well-defined reputation and role throughout the region, resulting in widespread agreement throughout this study.

Though familiarity with Manassas remains constant, the City has once again made gains in being associated with high tech firms. Self-reported visitation stayed high, over ninety percent, making for a fairly knowledgeable sample of respondents. In open-ended questions, these respondents were slightly less likely to refer to the Historic Downtown and more likely to refer to the challenges Manassas has faced recently because of its growth and development.

Lastly, initial testing for awareness of communication efforts on behalf of the City's Department of Economic Development returned benchmarks that around a fifth of respondents may be familiar with either your newsletter or your Facebook page. As Manassas is known for its community events throughout the region, future research can answer whether this level of awareness persists because of interest in those events.

External Qualitative Data

Influencer Perception Study

Influencer Perception Study

OVERVIEW

Purpose

The purpose of the Perception Study is to gain an in-depth understanding of the brand perceptions of Manassas among important target audiences. What do these external constituents of the brand have to say about the area as a place for economic development?

Methodology + Results

North Star consultants conducted perception interviews via telephone. The targeted audiences included leaders from nearby communities as well as regional officials and professionals in economic development. Questions were phrased to gather qualitative information. The following pages reflect frequent commentary and the most insightful conversations.

Influencer Perception Study

EXTERNAL PERCEPTIONS

Assets

Semiconductor manufacturing (Micron)
Aerospace + defense manufacturing

Talent + expertise in engineering as well as the above industries

Downtown businesses thrive as options for both City + PWC residents

History + community events are visible + well-known

Logical + convenient location for support industries

Manassas Regional Airport + employers operating/innovating there

Relationship with Prince William County + regional partners

Lower-cost alternative, though margins are decreasing

Challenges

Limited space left for large-scale development

Transitional zone between D.C. + rural VA

Ripple effect in supply chain jobs for Micron not entirely evident

Overshadowed by urban neighbors such as Alexandria + Fairfax

Lacks density to support knowledge/white-collar jobs

Regional partnership is nascent, not strictly collaborative

In competition with Loudoun County, other communities outside the beltway

Meeting housing demands to sustain workforce goals

Diversifying away from government contracts

Opportunities

Continue to focus on strengths in tech manufacturing—keep big employers in place

Work with Prince William Co. on micro-regional initiatives; NOVA partners on region-wide initiatives

Invest in regional collaboration: a good start with great potential yet to be realized

Redevelopment should be a priority, with walkability and gathering spaces in mind

Small business starts + support, for both legacies + tech startups

Accumulate hybrid or remote talent to bolster available workforce


Bio-tech a possible fit for local expertise + available facilities

Revenue-sharing development (RIFAs) an option for collaboration with PWC

Influencer Perception Study

KEY FINDINGS

In general, leaders from peer and State economic development organizations are impressed with the role that Manassas has carved out for itself. Every person interviewed was familiar with the semiconductor, aerospace, and defense manufacturing that powers the Manassas economy, and they saw that as the City's greatest asset. They recognized the importance of communities like Manassas thriving as support satellites (especially thanks to the airport) rather than competing with the likes of Fairfax and Alexandria.



Fittingly, nearly all of the influencers were excited by what they see in terms of regional collaboration. While the competitive spirit of the communities in the NOVA EDA does not go away, investing in coordination and partnership can get the region into consideration for development and opportunities that no place in Virginia has currently.

At the local level, influencers acknowledge that the future of Manassas lies in redevelopment or revenue-sharing agreements with Prince William County (if possible). Some already see that happening and hypothesized a long-term goal to revitalize the City with an eye towards attracting talent and investment without compromising on its historic appeal.

Thank you, Manassas!