

the  
**american**  
experience

# **2005 VISITOR STATISTICS**

***WASHINGTON, DC***

WASHINGTON  
**DC**   
Convention & Tourism  
CORPORATION

# Methodology Note



**In 2005, WCTC began tracking visitation to the city of Washington, DC instead of visitation to the Washington, DC region to better reflect spending and tax benefits to the District of Columbia**

# Methodology



Data collected via *DIRECTIONS*<sup>®</sup> managed by D.K. Shifflet & Associates

- ⊕ In partnership with Travel Industry Association of America (TIA)

Ongoing monthly panel of U.S. households

- ⊕ More than half million households
- ⊕ Panel representative to the U.S. population
- ⊕ Combination of mail and online sample
- ⊕ More than 75,000 respondents each year
- ⊕ *Travel definition*: an overnight-trip or any day-trip greater than 50 miles one-way from home (self-reported)

Data supplied to Global Insight and combined with economic data to project future visitation and calculate the impact of visitor spending for Washington, DC

Note: all data refers to domestic visitation, unless otherwise noted



**GLOBAL INSIGHT**

# 2005 Key Findings



## Total Domestic & International Visitation

- ⊕ Total visitation increases to 15.4 million
- ⊕ Total visitor spending in Washington, DC surpasses \$5 billion in 2005, increasing by 4.6%
- ⊕ Spending increases in both international and domestic markets
- ⊕ As a result of travel & tourism generated tax revenue, 254,247 households in DC benefit with \$2,135 in tax savings

# 2005 Key Findings

## Domestic Visitation

- ⊕ Domestic visitation up to 14.1 million
- ⊕ Total number of hotel visitors increases 5% from 2004 to 6.3 Million
- ⊕ Average spend per party for overnight leisure visitors at \$1,289
- ⊕ The average length of stay (among overnight visitors) is 3.2 days
- ⊕ Travelers rate DC high on satisfaction as a destination
- ⊕ DC attracting more first time visitors than other major northeast cities



# Overall Visitation

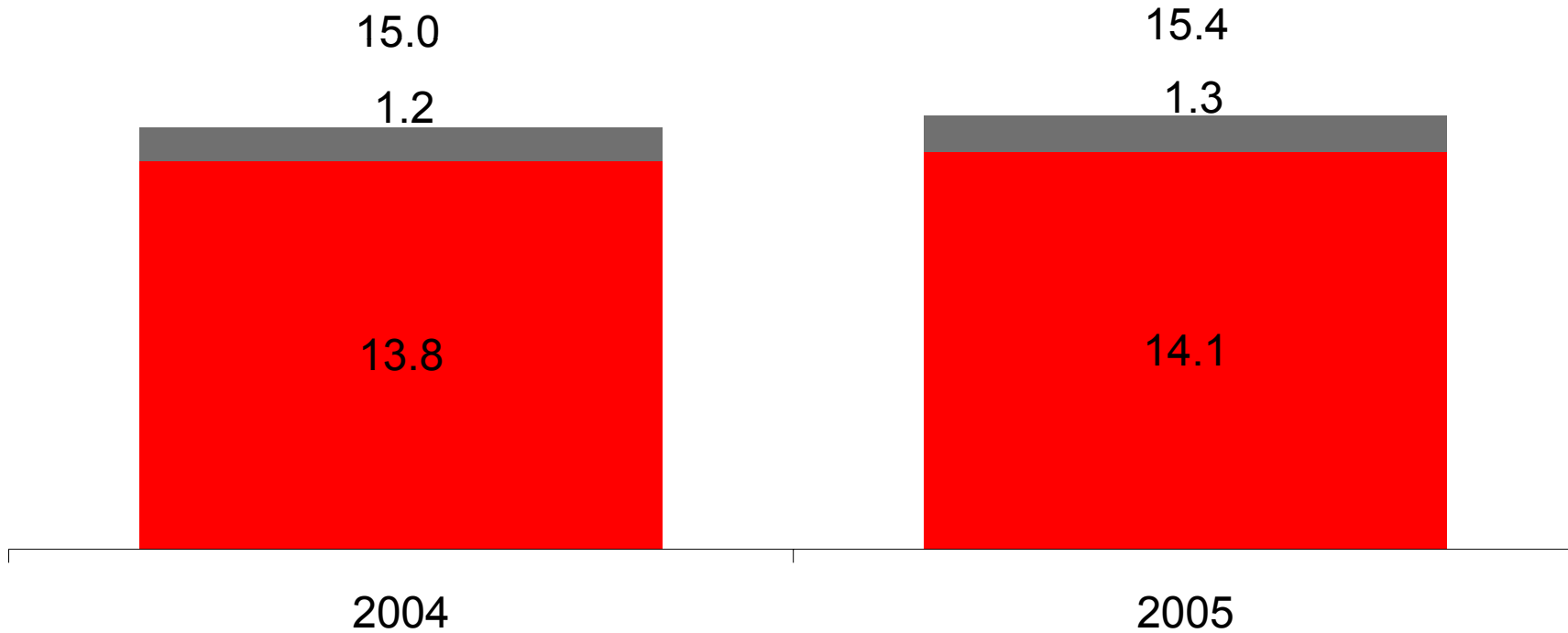


# More than 15 Million Total Visitors



Total Visitation to DC  
(in millions)

- International
- Domestic



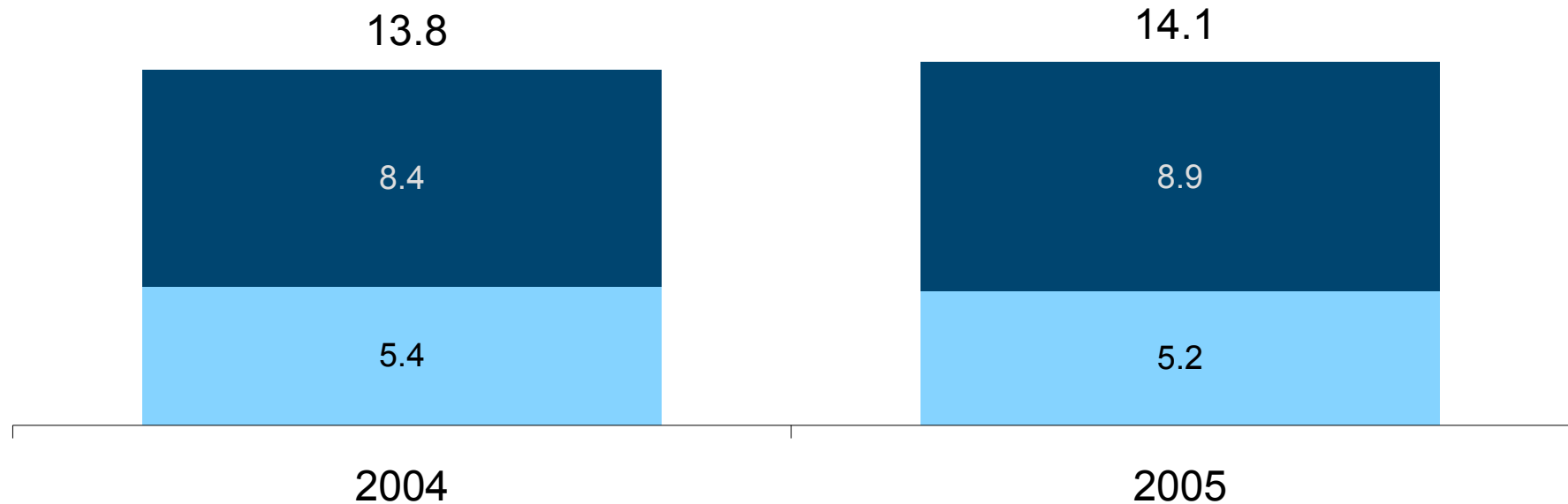
Source: DK Shifflet DIRECTIONS®

# About Two-Thirds of DC Visitors Stay Overnight



Duration of Travel  
(in millions)

■ Day ■ Overnight



Note: day-trip is greater than 50 miles one-way from home (self-reported)  
Source: DK Shifflet DIRECTIONS®



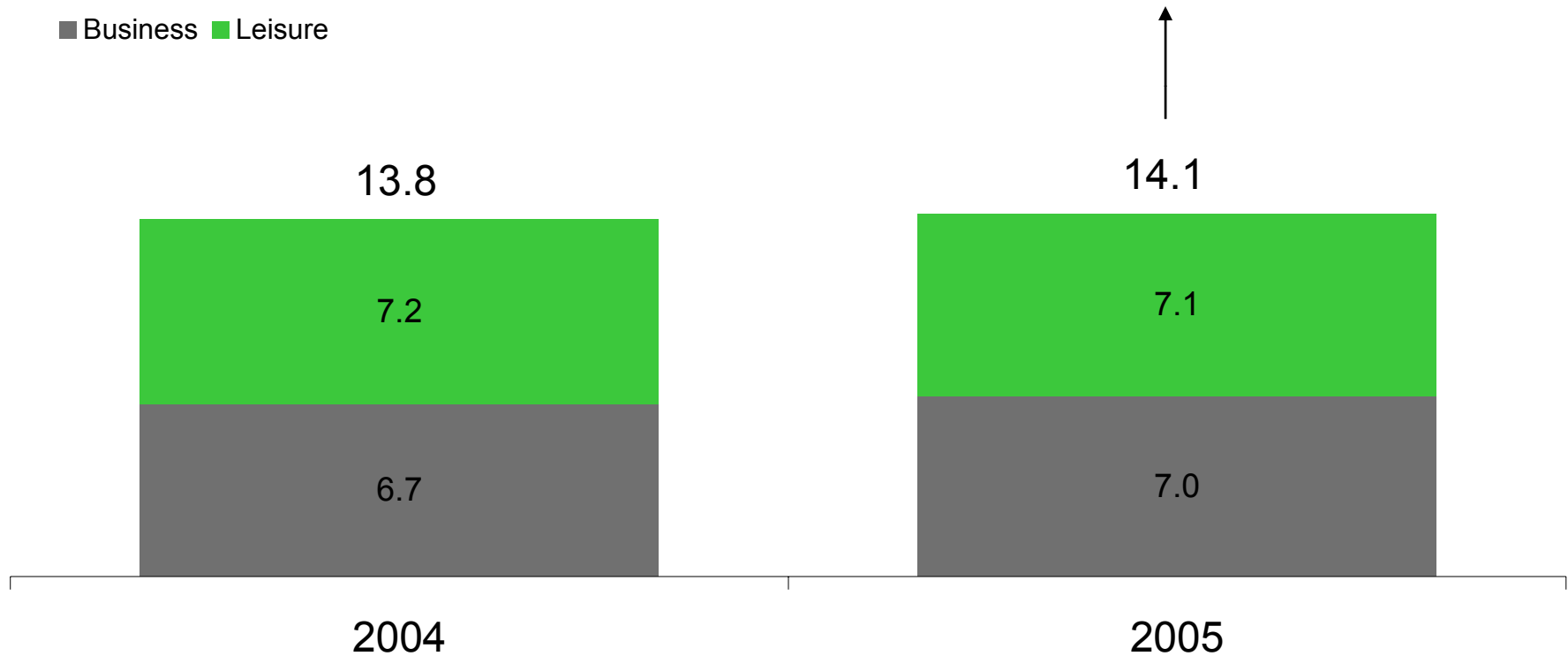
# Business Travel Increases 4% in 2005



Purpose of Travel  
(in millions)

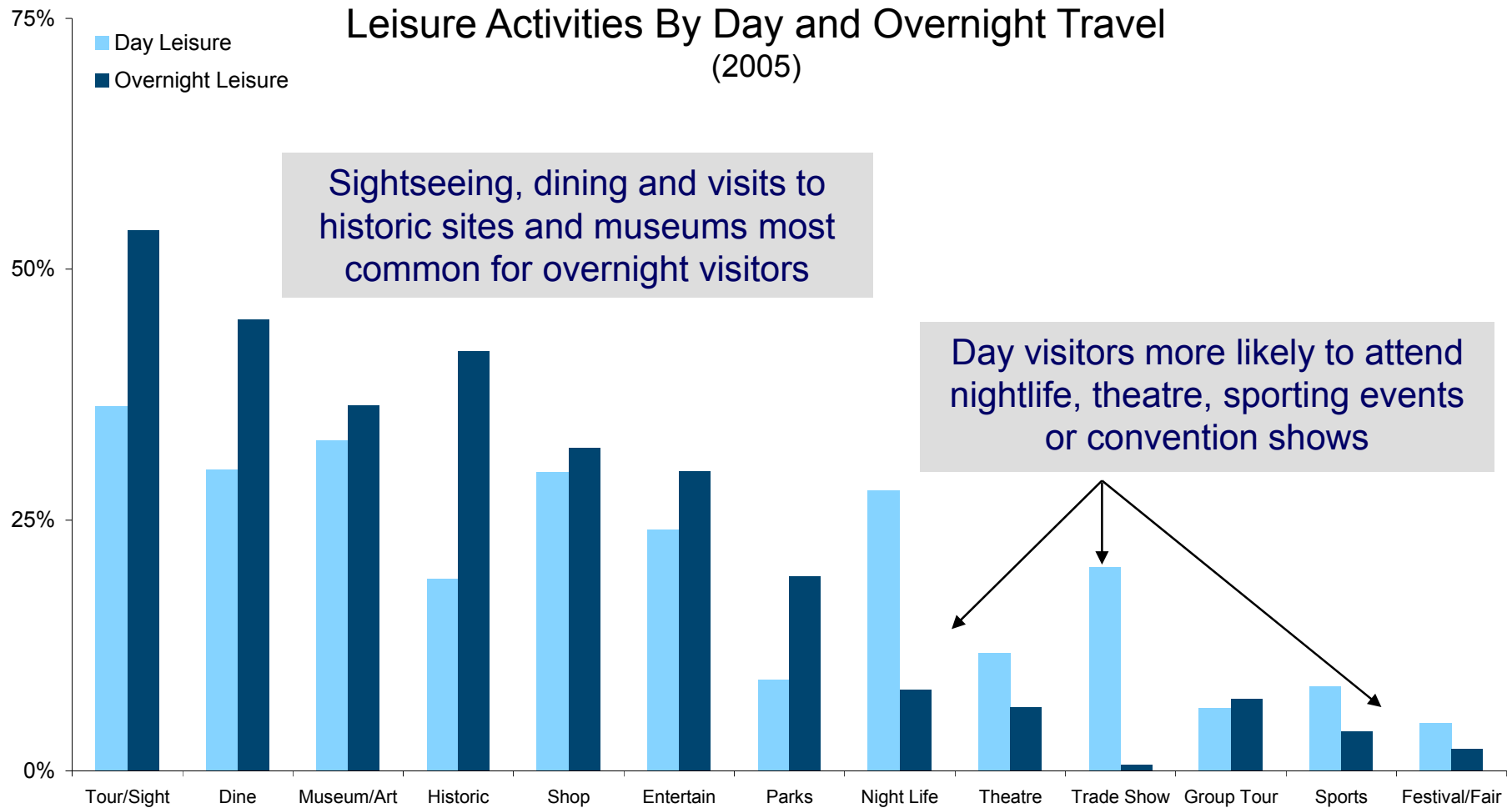
More business travelers to DC in 2005 and about the same number of leisure travelers

■ Business ■ Leisure



Source: DK Shifflet DIRECTIONS®

# Many Visitors Take Advantage of DC's Cultural Opportunities



Note: day-trip is greater than 50 miles one-way from home (self-reported)  
 Source: DK Shifflet DIRECTIONS®

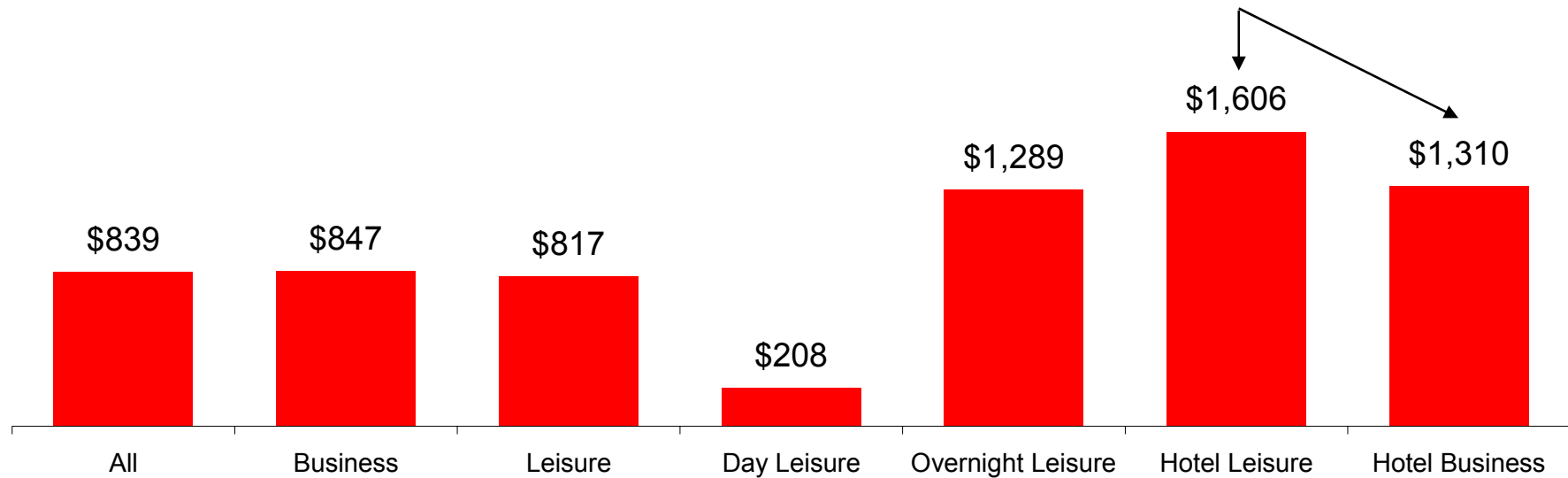
\*Parks = National, State, etc.  
 Theatre = Concert, Play, Dance, etc.  
 Trade Show = Boat, Car, Home, etc.

# Average Spending Per Party (Per Visit) Near \$840



## Average Spend Per Party (2003-2005)

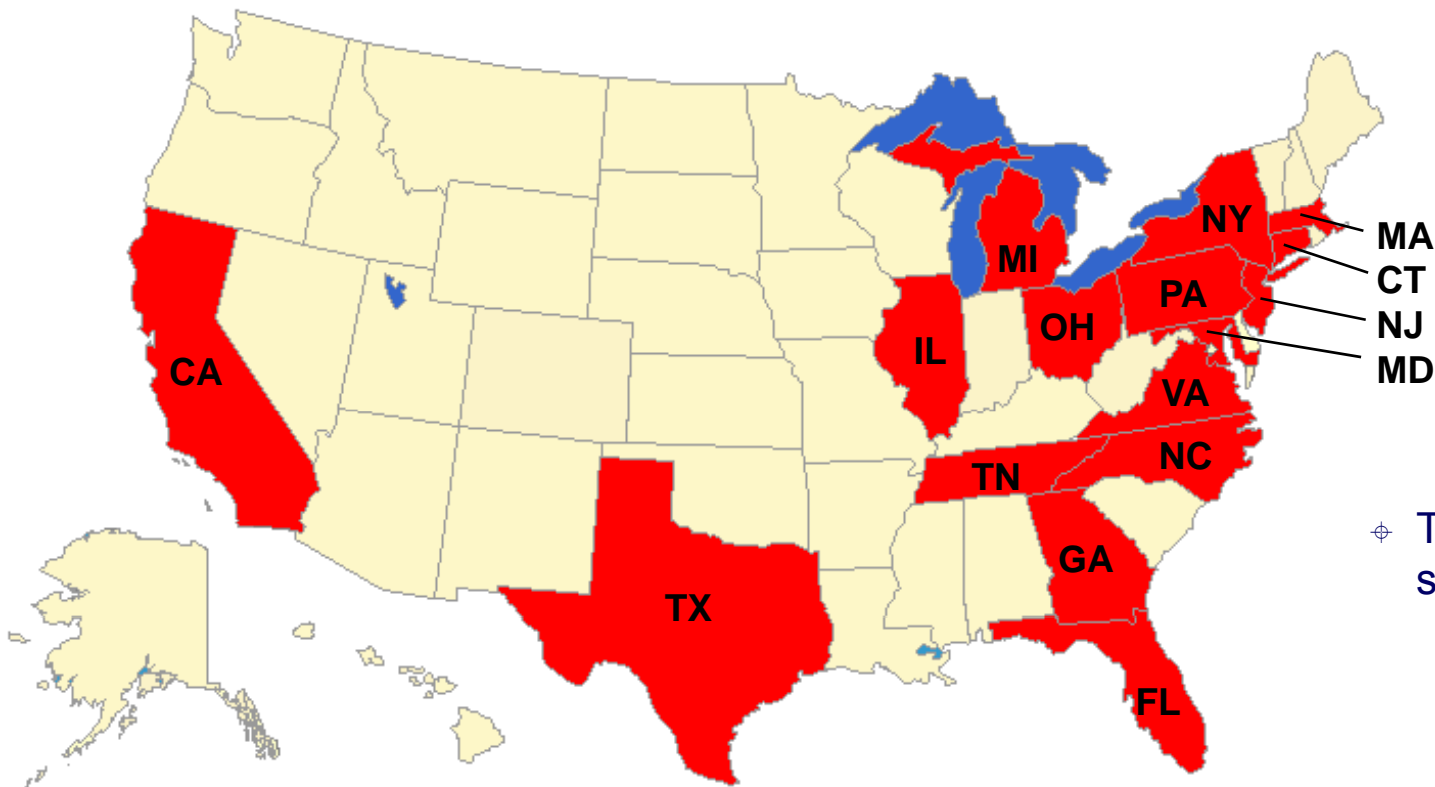
Among hotel guests, leisure visitors spend less per day, but travel in larger parties, which results in greater spend per party



Source: DK Shifflet DIRECTIONS®

# 16 Feeder States Supply 85% of All Visitors to the District

DC Visitors State of Origin – All Visitors  
(2003-2005)



- ⊕ These same states supply...
- ▶ 88% of leisure
  - ▶ 82% of business
  - ▶ 95% of day
  - ▶ 79% of overnight

Note: day-trip is greater than 50 miles one-way from home (self-reported)  
Source: DK Shifflet DIRECTIONS®

# Eastern DMAs Comprise Majority of Top 10 Feeder Locales per Segment



## DC Visitors DMA of Origin – By Segment (2003-2005)

Rank	All	Business	Leisure	Overnight	Day	Overnight Leisure
1	New York City	New York City	Washington, DC	New York City	Washington, DC	New York City
2	Washington, DC	Washington, DC	New York City	Philadelphia	Baltimore	Philadelphia
3	Philadelphia	Philadelphia	Richmond	Los Angeles	Philadelphia	Los Angeles
4	Baltimore	Baltimore	Philadelphia	Atlanta	Richmond	Boston
5	Richmond	Atlanta	Baltimore	Boston	New York City	Raleigh-Durham
6	Atlanta	Los Angeles	Raleigh-Durham	Raleigh-Durham	Harrisburg, PA	Pittsburgh
7	Los Angeles	Boston	Tampa	Chicago	Harrisonburg, VA	Washington, DC
8	Boston	Chicago	Pittsburgh	Washington, DC	Raleigh-Durham	Cleveland
9	Raleigh-Durham	Harrisburg, PA	Los Angeles	Cleveland	Greenville, NC	Chicago
10	Pittsburgh	Raleigh-Durham	Boston	Pittsburgh	Pittsburgh	Atlanta

Note: day-trip is greater than 50 miles one-way from home (self-reported)

Source: DK Shifflet DIRECTIONS®

\*Washington, DC includes surrounding counties; Boston includes Manchester, NH; Cleveland includes Akron; Greenville, NC includes New Bern and Washington, NC; Harrisburg, PA includes Lancaster, Lebanon, and York; Richmond includes Petersburg; Tampa includes St. Petersburg and Sarasota

# 30 Cities with Largest Amount of DC *Leisure* Visitors per Households Span the Country



## Top 30 Penetrated Cities – Leisure Visitors

(By DMA, 2003-2005)

*Alphabetical order, by state*

<b>California</b>	Los Angeles
	San Diego
<b>DC</b>	Washington, DC-Hagerstown
<b>Florida</b>	Jacksonville
	Orlando-Daytona Beach-Melbourne
	Tampa-St. Petersburg
<b>Georgia</b>	West Palm Beach-Ft. Pierce
	Atlanta
<b>Maryland</b>	Baltimore
	Salisbury
<b>Massachusetts</b>	Boston (Manchester, NH)
<b>New York</b>	New York City
	Syracuse
<b>North Carolina</b>	Charlotte
	Greensboro-High Point-Winston-Salem
	Greenville-New Bern-Washington
<b>Ohio</b>	Raleigh-Durham-Fayetteville
	Cincinnati
	Cleveland-Akron
	Columbus
<b>Pennsylvania</b>	Toledo
	Harrisburg-Lancaster-York
	Philadelphia
	Pittsburgh
<b>Rhode Island</b>	Wilkes Barre-Scranton
	Providence (New Bedford, MA)
<b>South Carolina</b>	Greenville-Spartanburg-Anderson, SC (Asheville, NC)
<b>Texas</b>	Austin
	San Antonio
<b>Virginia</b>	Richmond-Petersburg

Includes  
both day  
and  
overnight  
travel

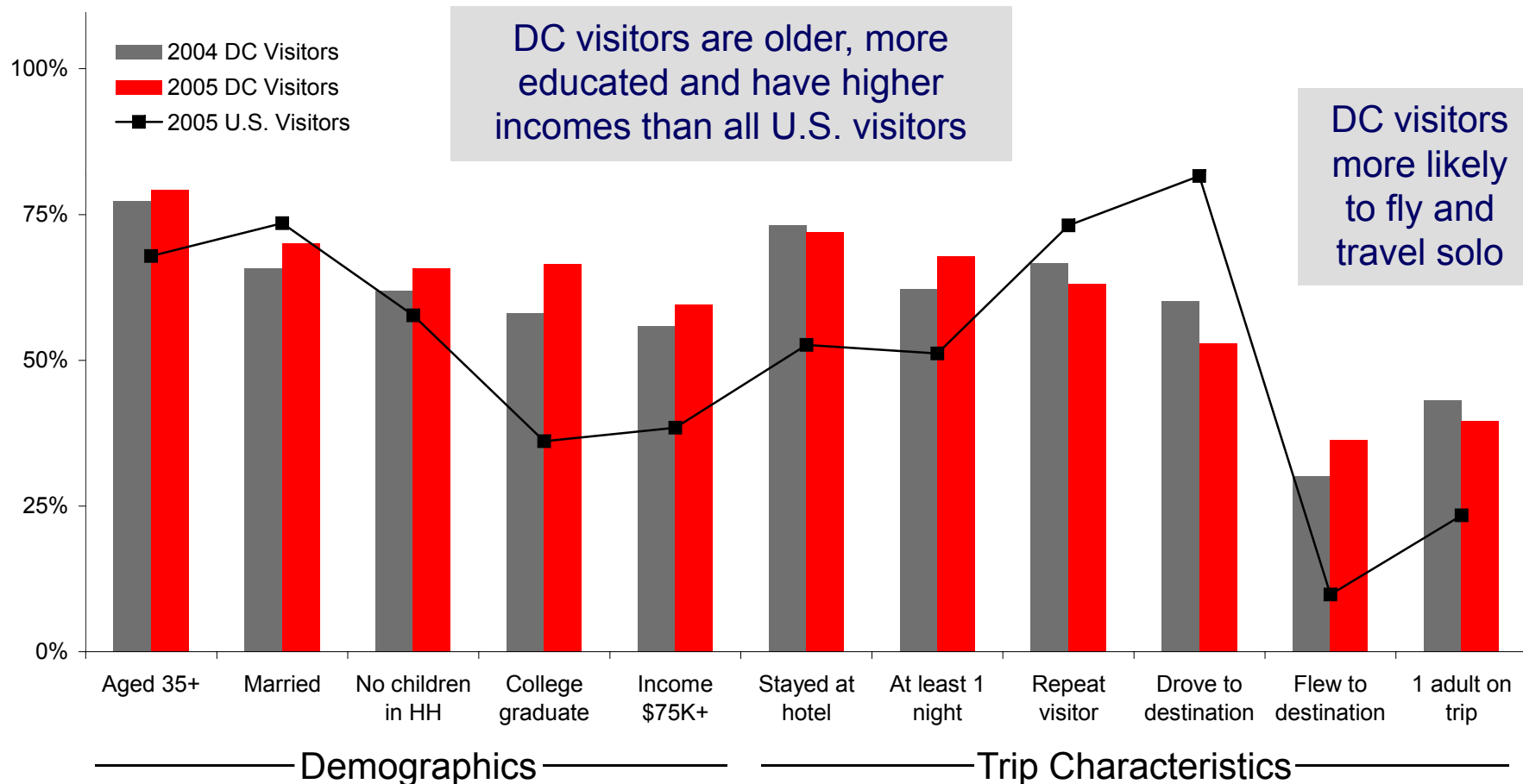
Source: DK Shifflet  
DIRECTIONS®

\*Penetration=Visitation in  
past three years/number  
of households in DMA

# DC Attracting Affluent Visitors



Profile of All Visitors  
(2004-2005)



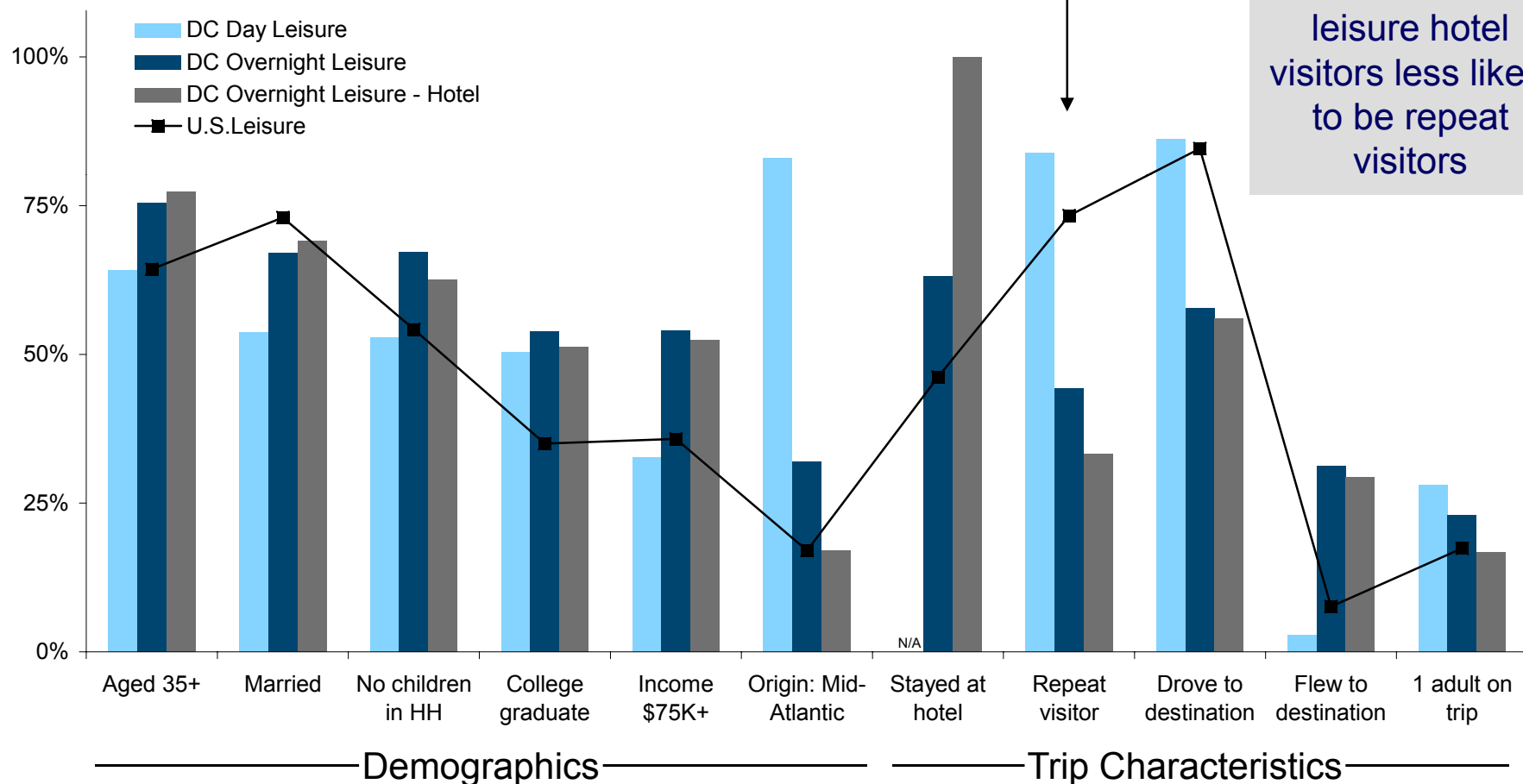
Source: DK Shifflet DIRECTIONS®

\*Repeat visitation (2 or more visits) in past three years

# DC Leisure Visitors Also More Affluent



## Profile of Leisure Visitors (2003-2005)



DC overnight leisure and leisure hotel visitors less likely to be repeat visitors

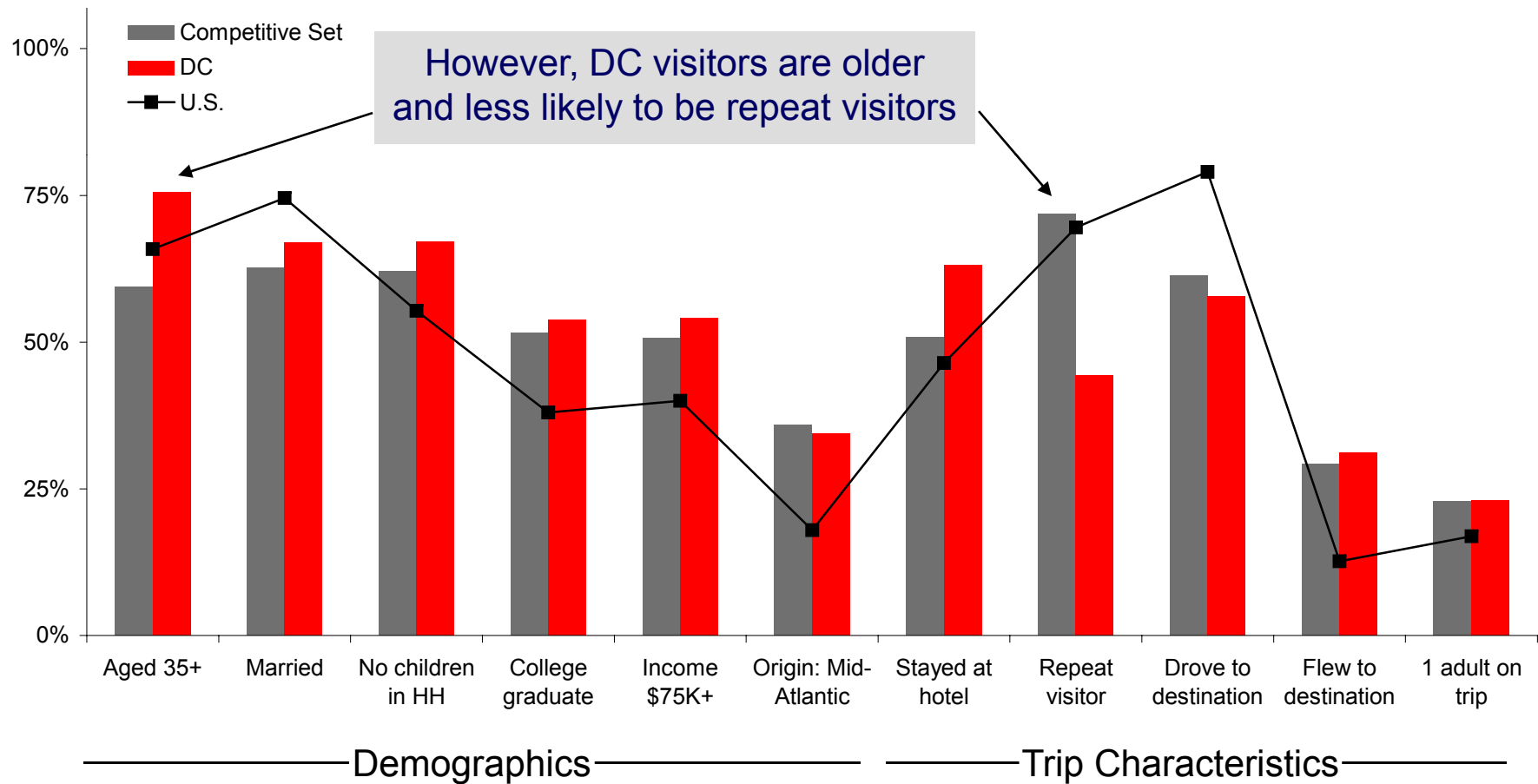
Source: DK Shifflet DIRECTIONS®

\*Repeat visitation (2 or more visits) in past three years  
Origin: Mid-Atlantic includes DC, DE, MD, NJ, NY, PA, VA



# Generally, DC & Its Competitors Attract Similar Visitors

## Profile of Overnight Leisure Visitors (2003-2005)

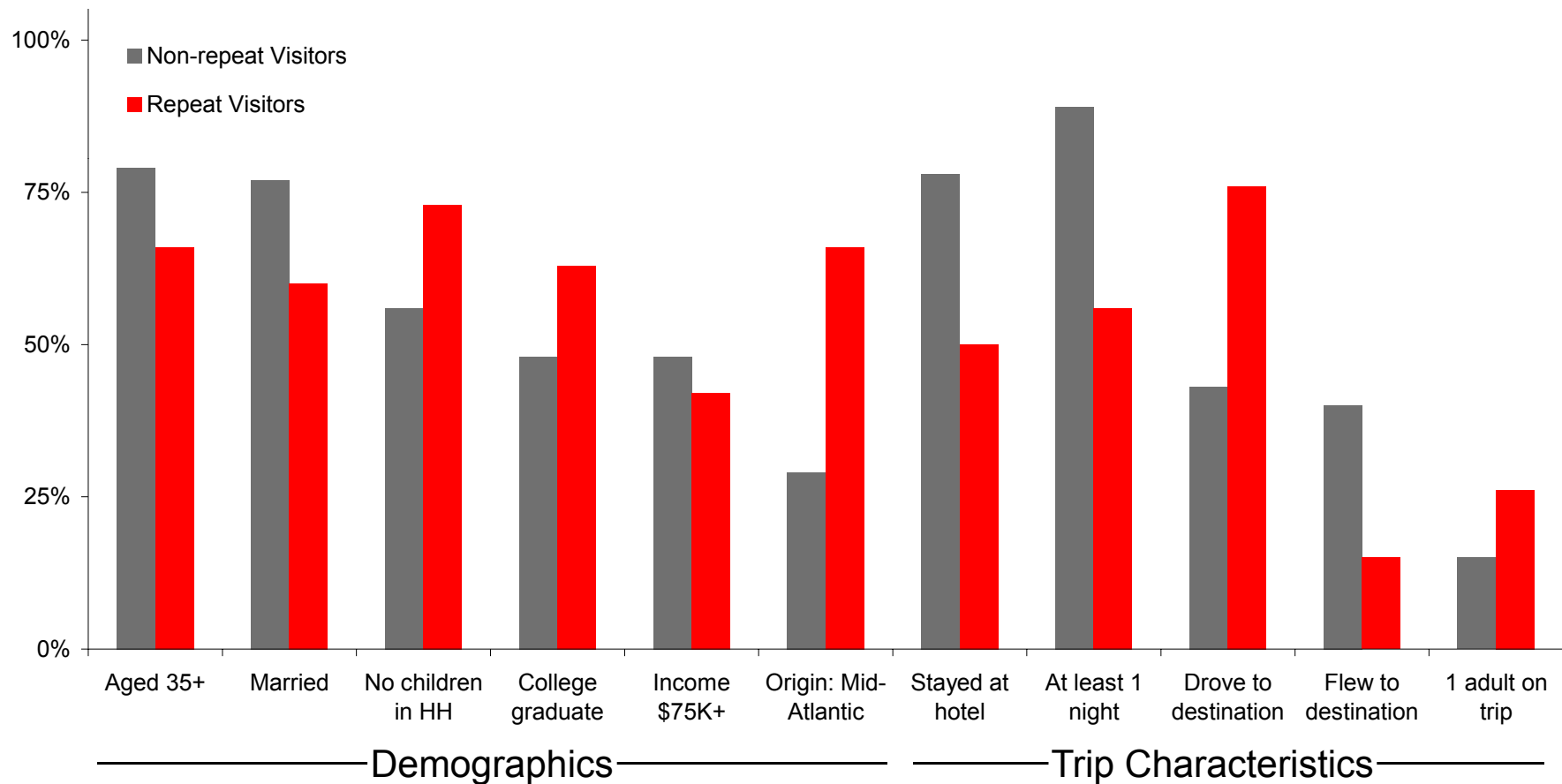


Source: DK Shifflet DIRECTIONS®

# Repeat Visitors Less Likely to Stay in a Hotel & Stay for at Least One Night



Profile of Leisure Visitors by Repeat Visitation  
(2003-2005)



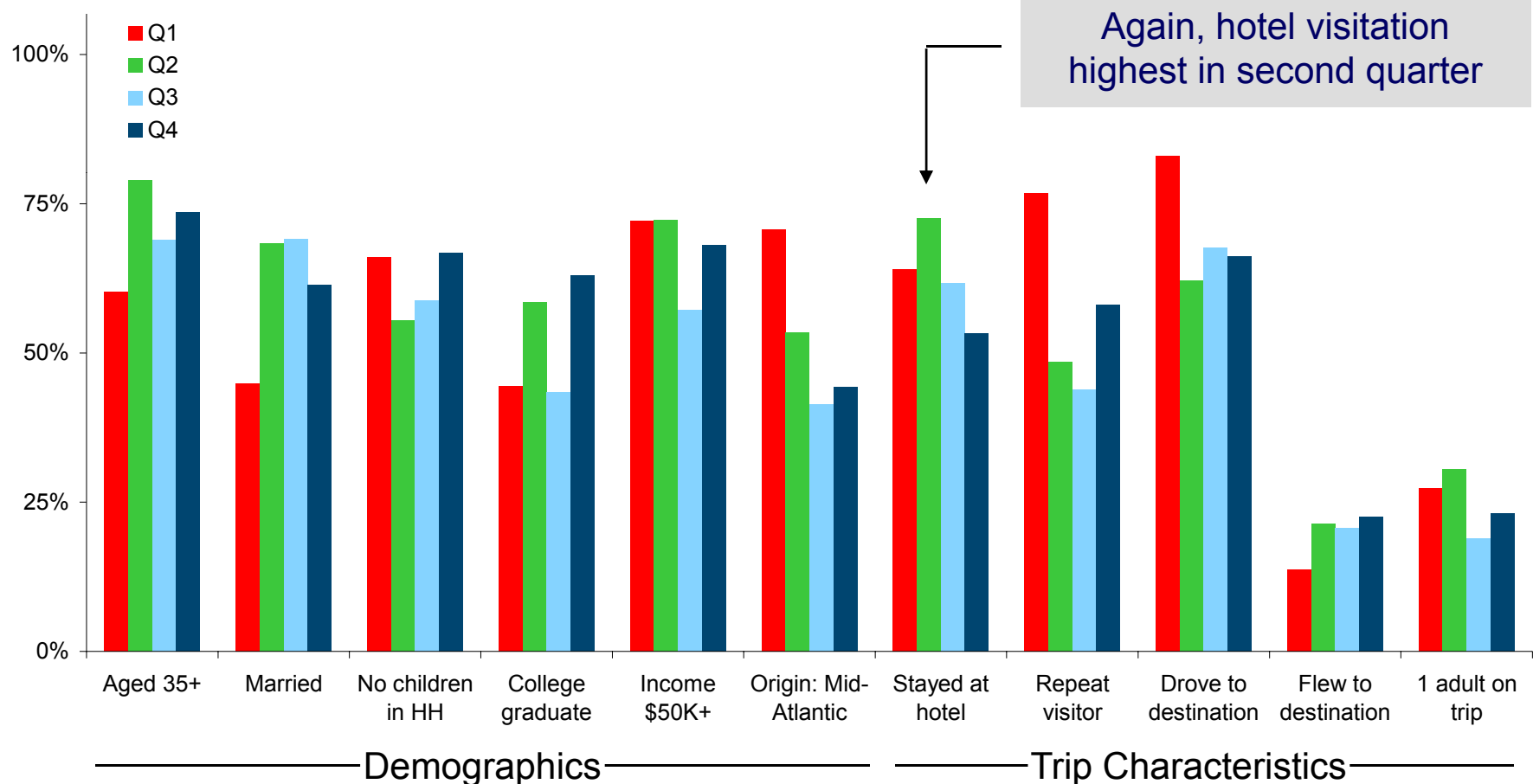
Source: DK Shifflet DIRECTIONS®

\*Repeat visitation (2 or more visits) in past three years  
Origin: Mid-Atlantic includes NY, NJ, PA, DE, MD, DC, VA

# 1st Quarter Visitors More Likely to Drive to DC & Be Repeat Visitors



Profile of Leisure Visitors by Quarter  
(2003-2005)



Again, hotel visitation highest in second quarter

Source: DK Shifflet DIRECTIONS®

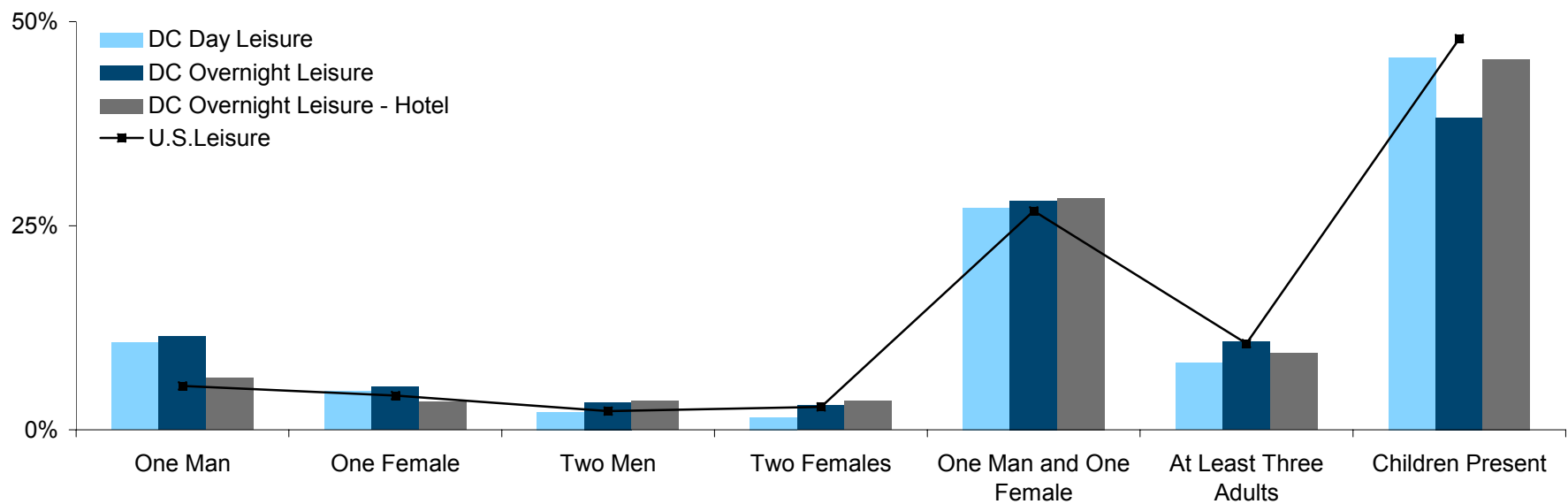
\*Repeat visitation (2 or more visits) in past three years  
Origin: Mid-Atlantic includes NY, NJ, PA, DE, MD, DC, VA

# Composition of DC's Leisure Visitors in Line with U.S. Travel Parties



## Composition of Leisure Travel Parties (2003-2005)

Average Party Size, 2005	
Day Leisure	2.3
Overnight Leisure	2.0
All U.S. Leisure	2.4



Source: DK Shifflet DIRECTIONS®



# Travel Summary & Outlook



# 2005 Strong Year for Travel



- ⊕ Record 3.02 billion domestic travelers
  - ▶ 4% increase in total travel
  - ▶ 8th consecutive growth year in total travel
  - ▶ Both leisure (3%) and business (7%) travel increased
  
- ⊕ Over \$700 billion dollars directly spent on travel (e.g., lodging, transportation, food, entertainment, etc.)
  - ▶ Almost \$500 billion from the leisure segment alone
  
- ⊕ International travel up 7%
  
- ⊕ U.S. hotels report strong performance
  - ▶ Occupancy rates up 2%
  - ▶ Average Daily Rate (ADR) up 5%

Source: TIA, DK Shifflet, ITA, Office of Travel and Tourism Industries, Smith Travel Research

# 2006 Projected to Bring Continued Increases



## Domestic Visitation

- ⊕ Domestic leisure travel to grow 2%
  - ▶ Despite energy and gas prices
- ⊕ Domestic business travel to grow 1%
- ⊕ International travel to grow 5%
  - ▶ Due in part to continued appreciation of the Pound, Euro, Yen, and Canadian dollar and recent decline of the U.S. dollar
- ⊕ Hotels expected to raise rates 6%
- ⊕ Projected 3.28 million occupied hotel rooms in the summer of 2006, an increase from 3.14 million for summer '05
- ⊕ Throughout U.S. hotels, proportion of leisure room nights continue to rise
- ⊕ Predicted U.S. economy changes look good for travel
  - ▶ GDP growth likely to remain solid in 2006 and unemployment on the decline

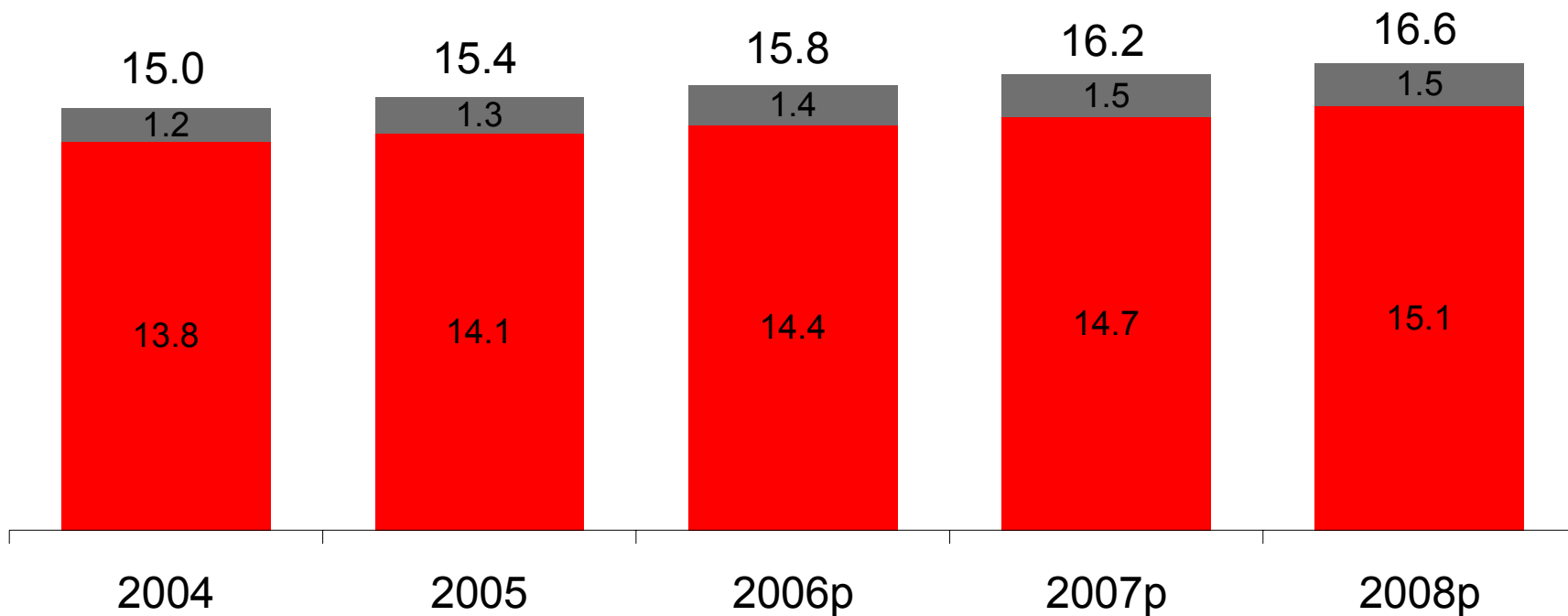
Source: TIA, DK Shifflet, ITA, Office of Travel and Tourism Industries, Smith Travel Research, PriceWaterhouse Cooper

# Visitation Projected to Reach 16.6 Million by 2008



Total Visitation to DC  
(in millions)

■ International  
■ Domestic



Source: Global Insight