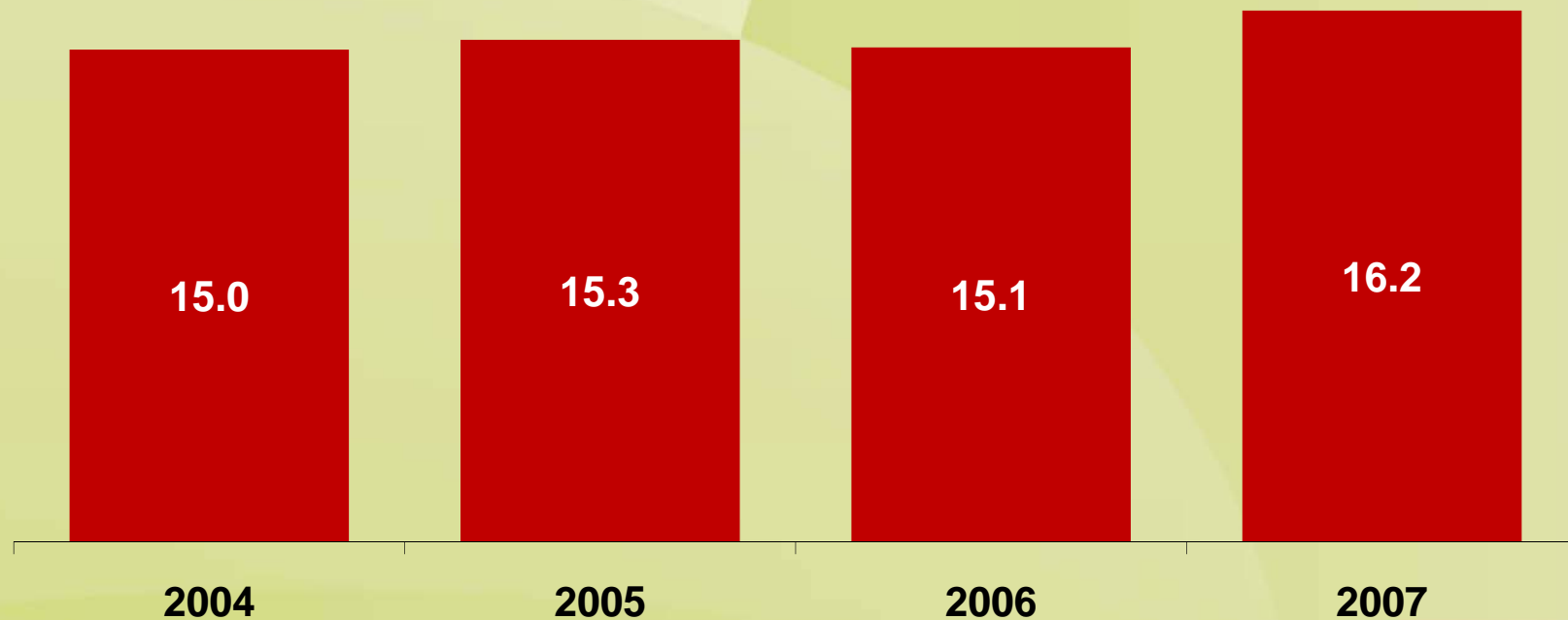




# Washington, DC's 2007 Visitor Statistics

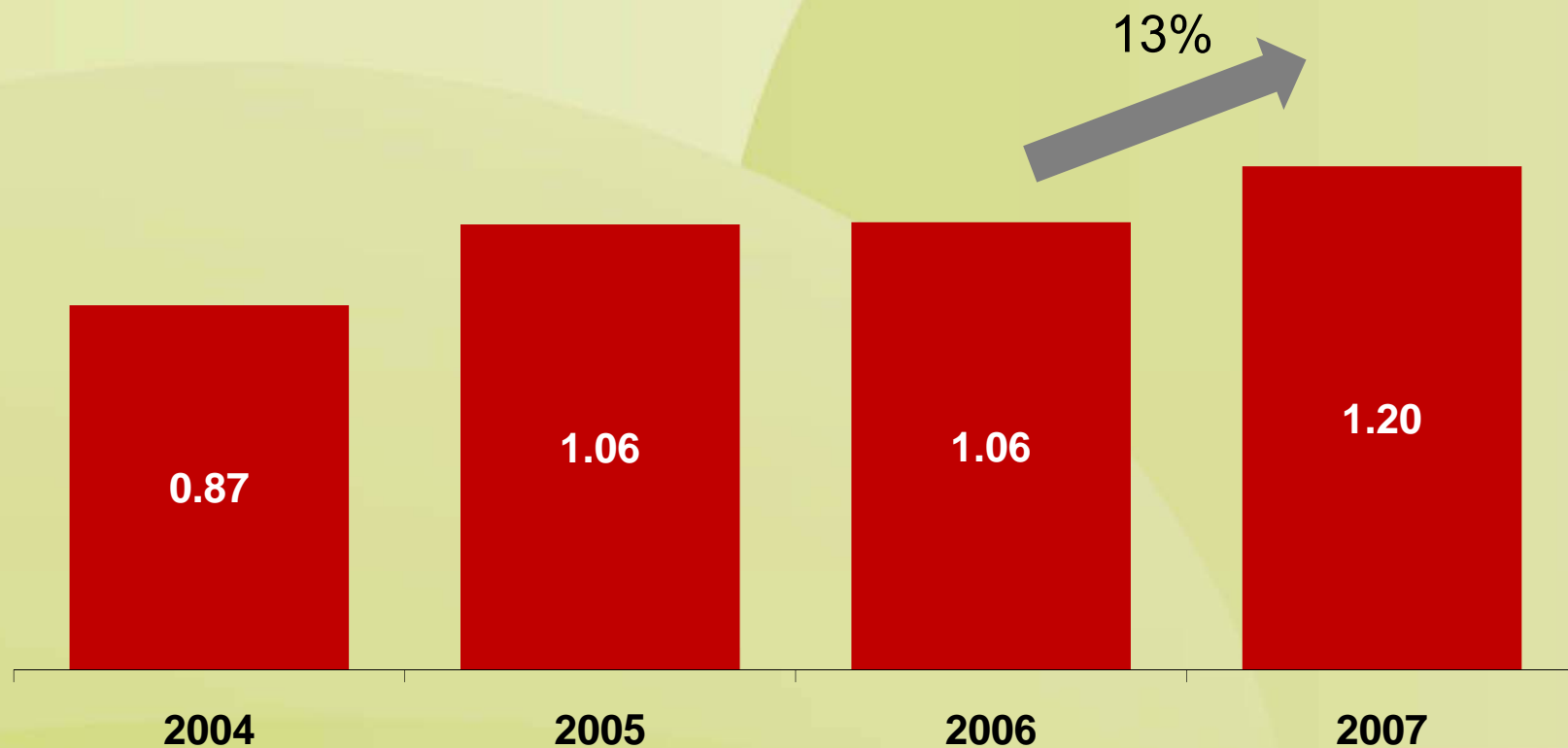
# TOTAL VISITATION TO DC

(CITY-DEFINITION, IN MILLIONS)



# OVERSEAS VISITATION TO DC

(IN MILLIONS)



Source: Office Travel & Tourism Industries, Dept of Commerce



# INTERNATIONAL ARRIVALS TO DC

★ IAD international arrivals increased 13% to nearly 3 million deplanements in 2007

- United Airlines from Beijing, Rome, Rio de Janeiro
- Iberia from Madrid
- Copa Airlines from Panama City
- Qatar Airways from Doha
- Aer Lingus from Dublin
- Expanded service from Seoul and Addis Ababa

★ IAD+BWI+DC = 10% increase to 3.5 million arrivals



# OVERSEAS VISITATION

Destination (MSA Level)	2005	2006	2007
New York City	1	1	1
Los Angeles	2	2	2
Miami	4	5	3
San Francisco	3	3	4
Orlando	5	3	5
Las Vegas	7	7	6
Honolulu/Oahu	6	6	7
Washington, DC	8	8	8
Chicago	9	8	9
Boston	10	10	10

★ #8 position since overseas tracking began in 1998

★ DC visitation increased 13% to 1,147,000 overseas visitors to in 2007

★ NYC visitation increased 23% in 2007 to 7.7 million visitors



# HOTEL STATISTICS

- April 2008 was a record-setting occupancy rate at 89%
- July 2008 was a July-best occupancy rate at 85%



ATTRACTION	2007 VISITATION	Percent Change from 2006
National Museum of Natural History	7.1 million	22% ↑
National Air and Space Museum	6.0 million	20% ↑
National Gallery of Art	4.5 million	-4% ↓
Lincoln Memorial	4.2 million	11% ↑
National World War II Memorial	4.1 million	5% ↑
Arlington National Cemetery	4.0 million	0%
Vietnam Veterans Memorial	3.6 million	0%
Korean War Veterans Memorial	3.4 million	6% ↑
Chesapeake & Ohio Canal National Historic Park	2.8 million	-8% ↓
Franklin Delano Roosevelt Memorial	2.7 million	3% ↑

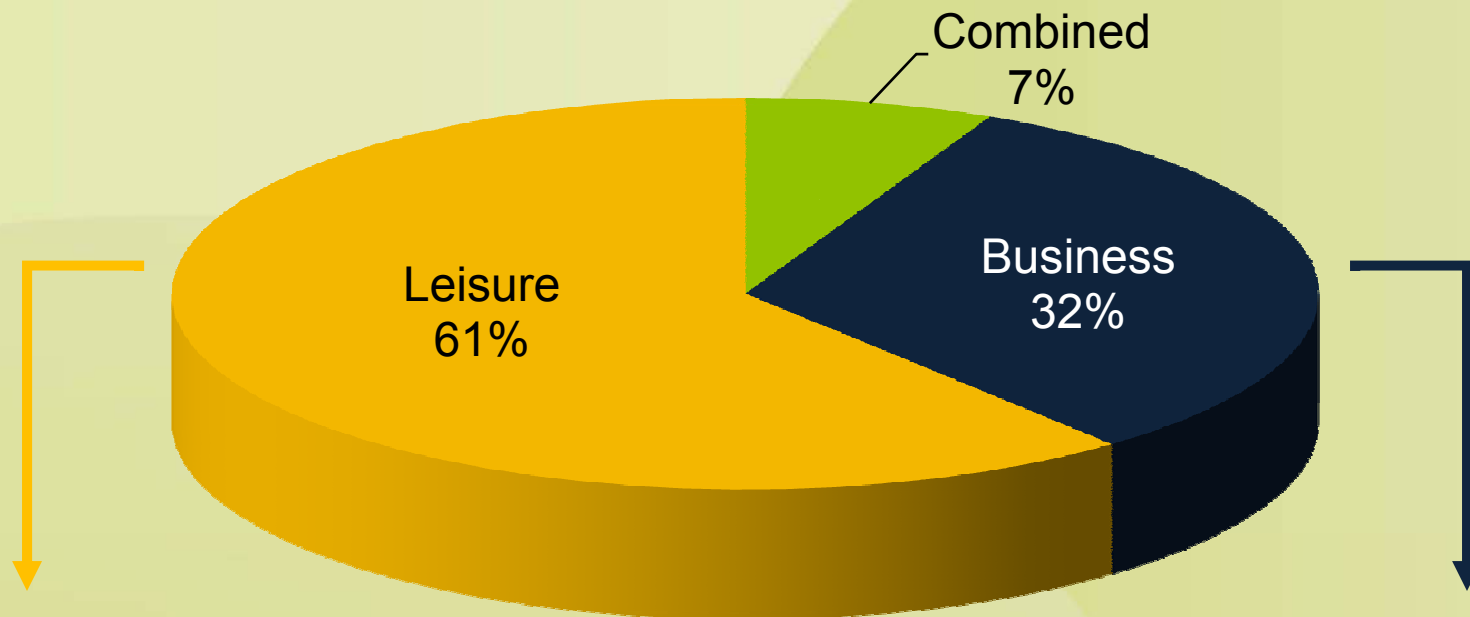




<b>ADDITIONAL TOURISM INDICATORS</b>	<b>2007</b>	<b>Percent Change from 2006</b>
National Park Service – Mall locations	21 million	5% ↑
Smithsonian – all DC locations	23.7 million	4% ↑
Total domestic arrivals (DCA+IAD+BWI)	28.7 million	3% ↑
Total international arrivals (DCA+IAD+BWI)	3.5 million	10% ↑
WMATA Metro rail ridership	212 million	3% ↑
Circulator ridership	2.4 million	16% ↑



# PURPOSE OF TRAVEL: OVERNIGHT VISITORS



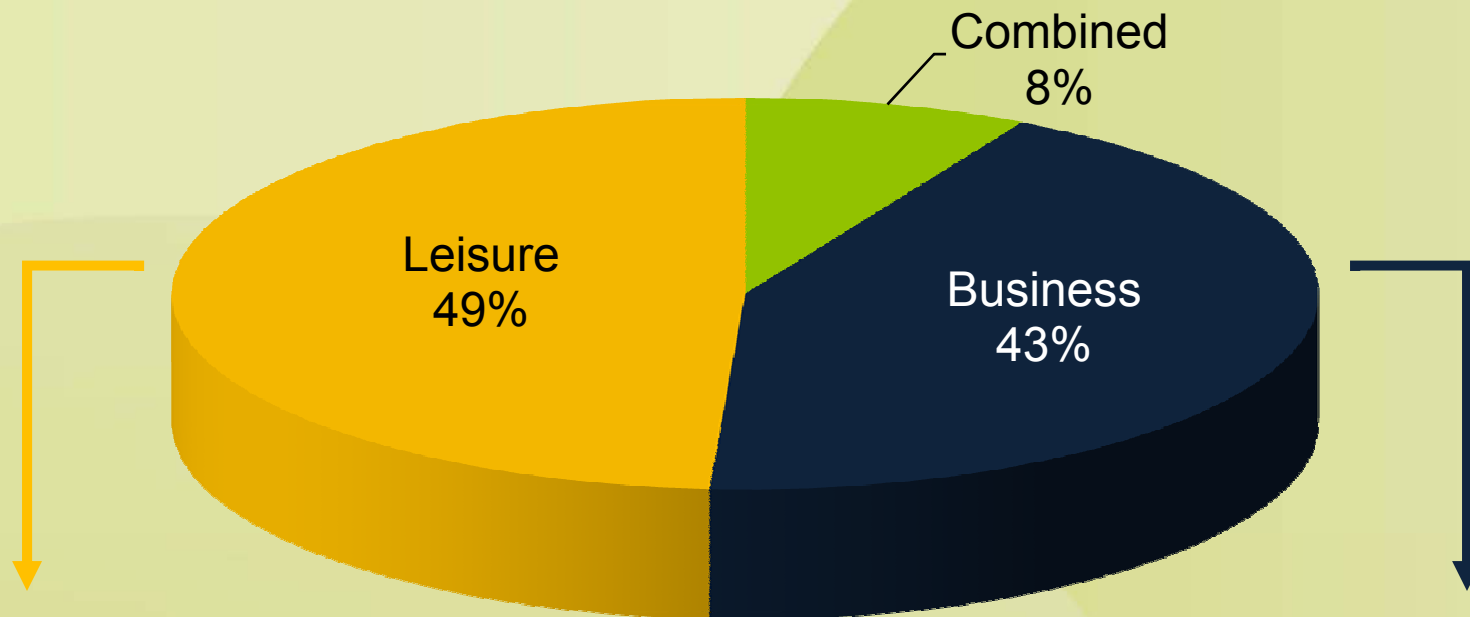
## ***Among leisure...***

Visit friends/relatives	31%
Touring	14%
Special event	7%
City trip	7%
Other leisure	2%

## ***Among business...***

Convention/group meeting	13%
Other company business	19%

# PURPOSE OF TRAVEL: HOTEL VISITORS



## ***Among leisure...***

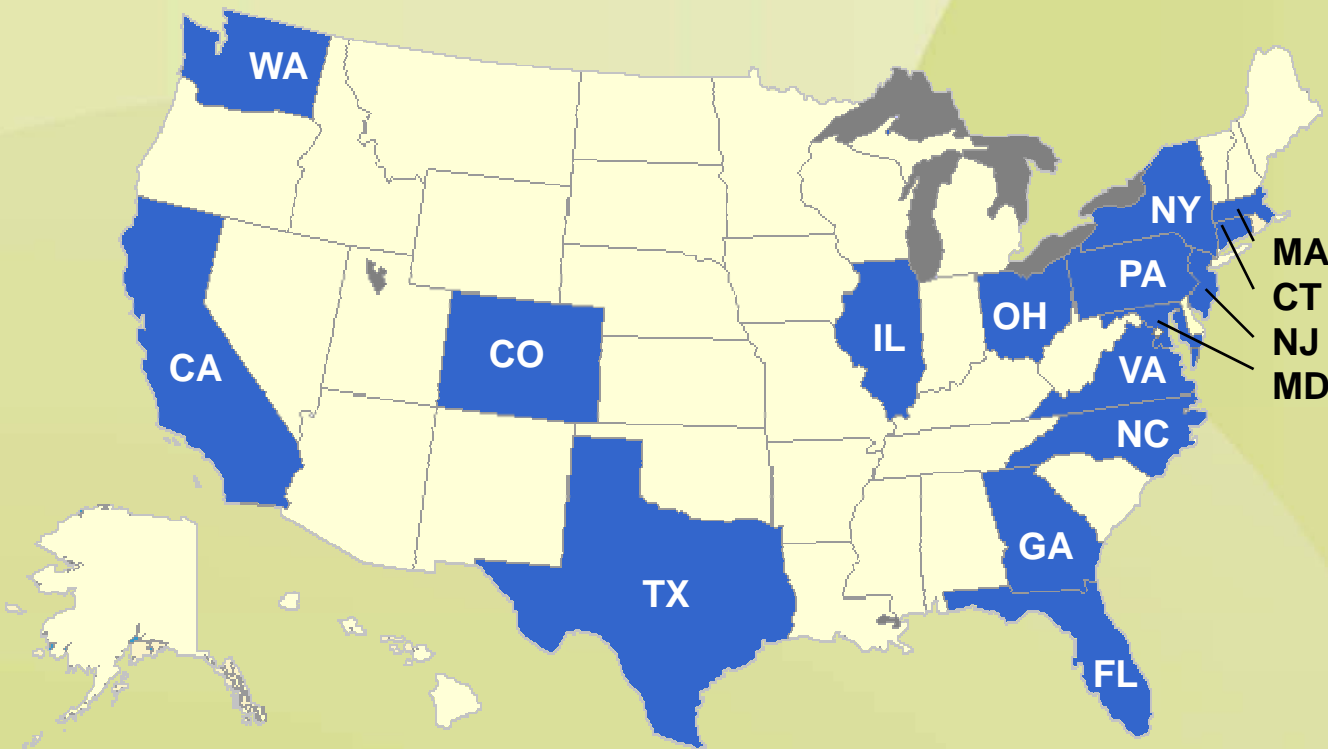
Visit friends/relatives	16%
Touring	17%
Special event	8%
City trip	6%
Other leisure	2%

## ***Among business...***

Convention/group meeting	17%
Other company business	26%

# ORIGIN MARKETS: OVERNIGHT VISITORS

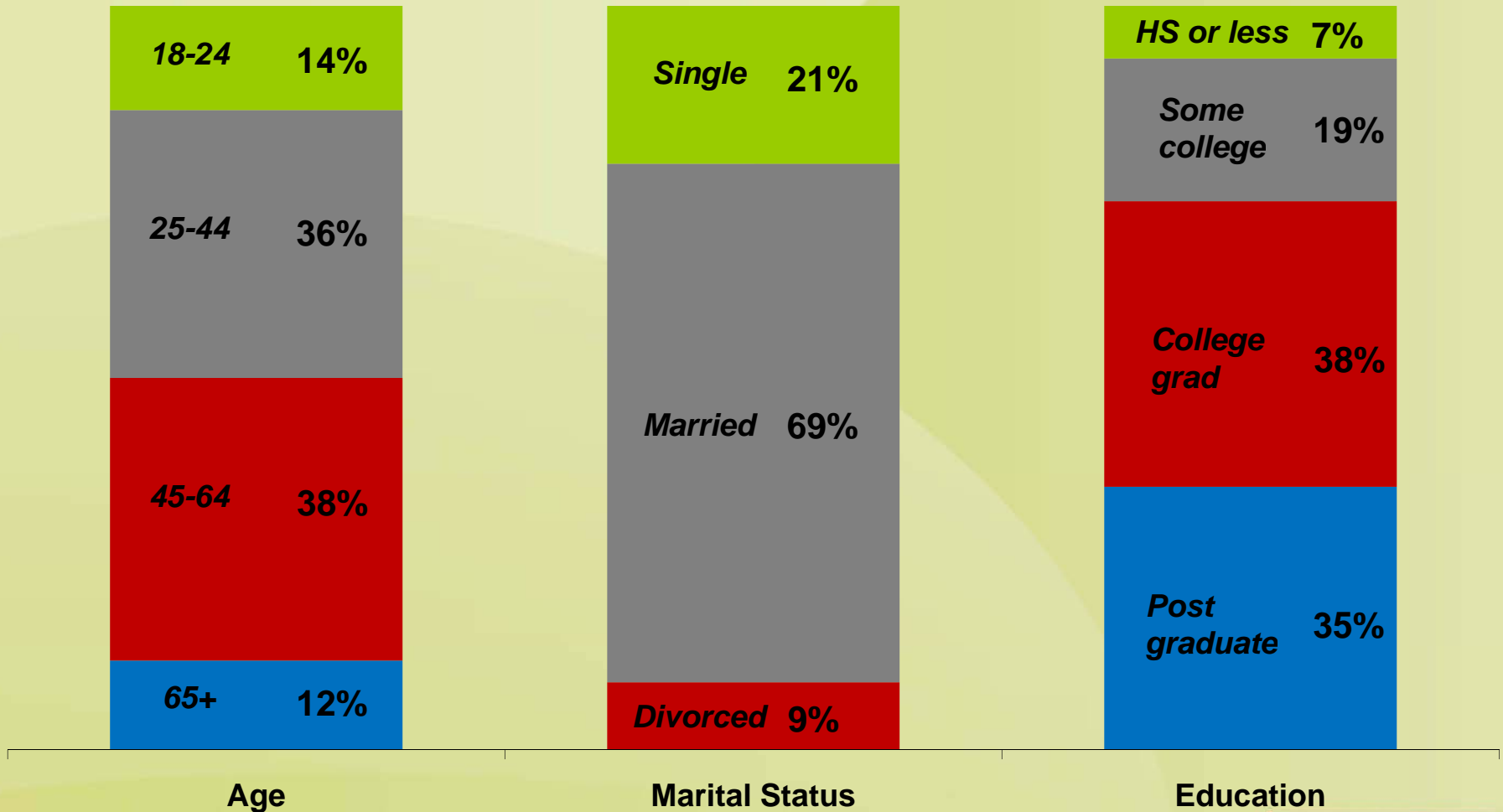
76% of overnight visitors originate from 16 states



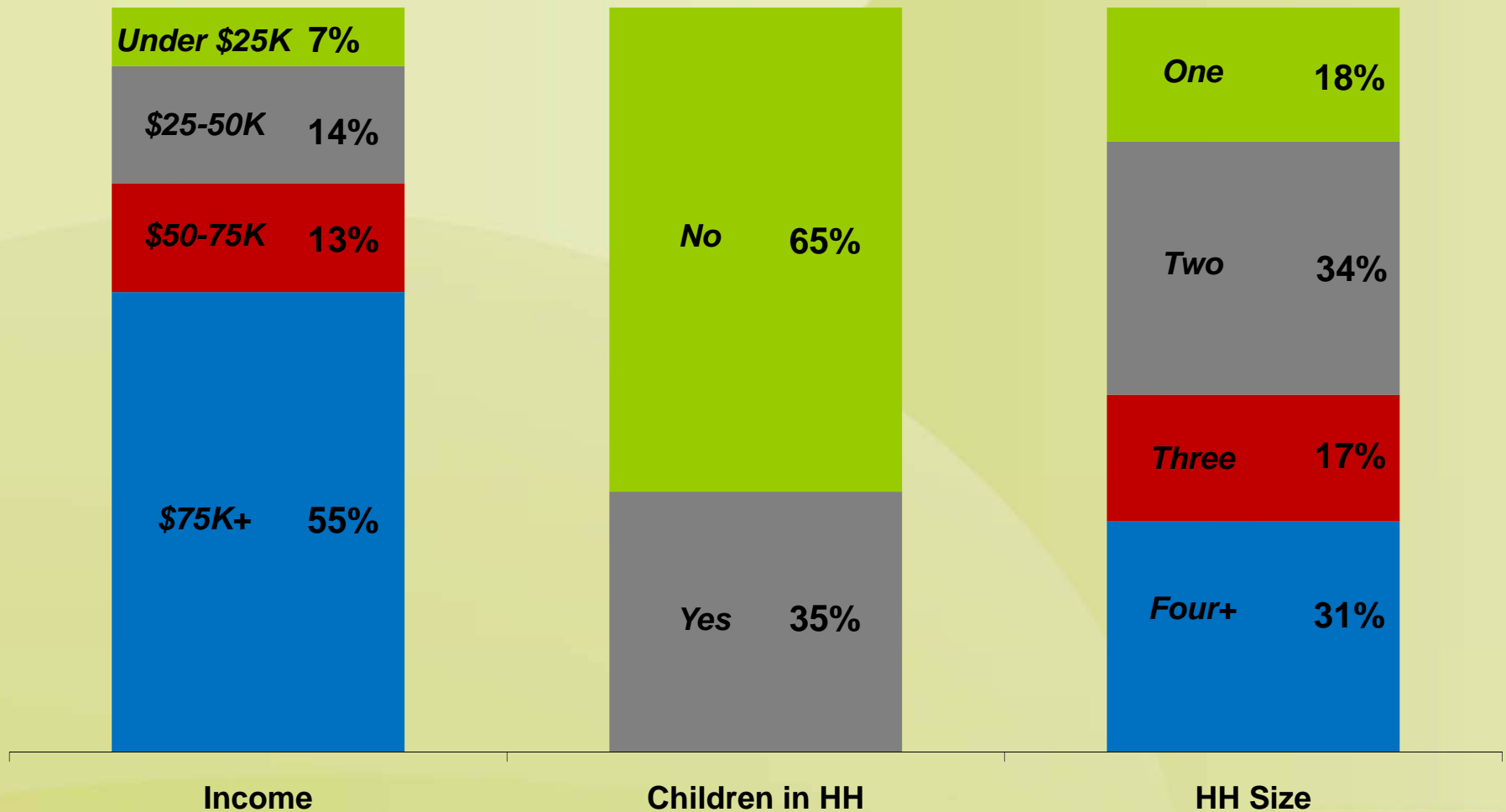
About half from:

New York City  
DC  
Philadelphia  
Atlanta  
Boston  
Raleigh-Durham  
Los Angeles  
Norfolk  
Chicago

# DEMOGRAPHICS: OVERNIGHT VISITORS



# DEMOGRAPHICS: OVERNIGHT VISITORS



# OVERNIGHT VISITORS

★ Average # nights on trip: 4.8

★ Average # nights in DC: 3.4

★ Average travel party size: 2.7

# OVERNIGHT-LEISURE VISITORS

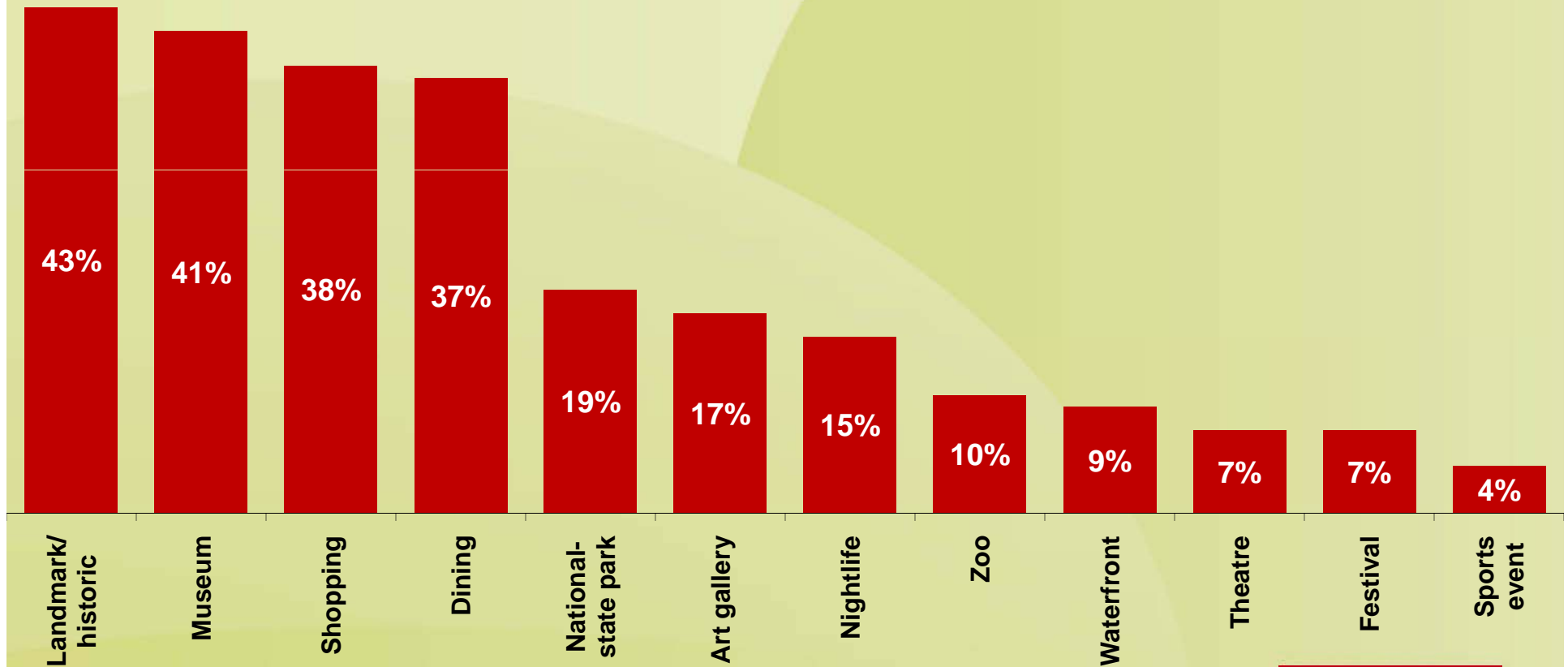
CHARACTERISTIC	DC	U.S.
Single	26%	18%
More Highly Educated <i>% College grad+</i>	65%	37%
Greater Incomes <i>% 75K+</i>	44%	20%
No Children in HH%	60%	54%
More Likely to Fly	33%	17%
Plan trip via Internet	62%	41%
Book trip via Internet	60%	38%



# DAY TRIPPERS

- ★ Majority from nearby cities
  - 35% within Washington region
  - 17% Baltimore
  - 7% NYC
  - 6% Philadelphia
  - Also Norfolk, Harrisburg, Richmond
- ★ Spend \$56 per person per day
  - About half (43%) on food/beverage
- ★ Average travel party size of 2.74  
(higher than U.S. norm of 2.65)

# LEISURE ACTIVITIES



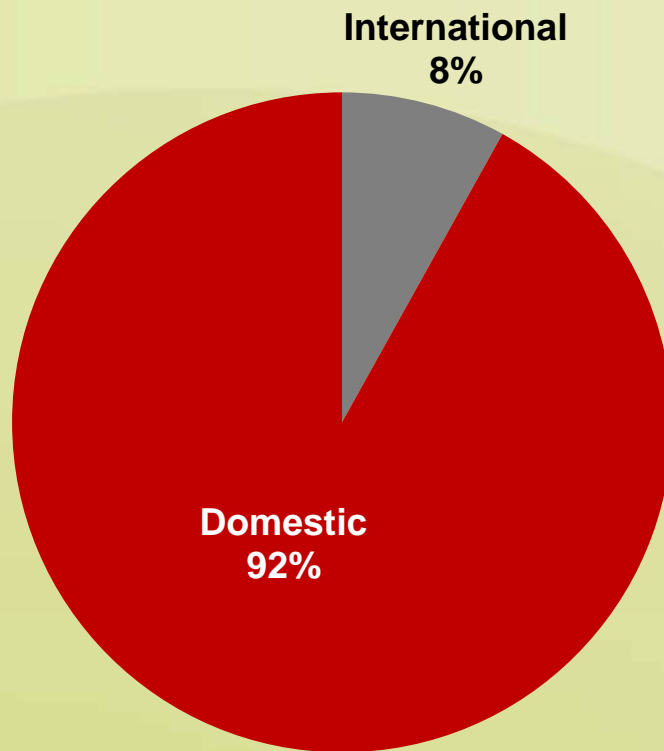
# VISITOR SPENDING (IN BILLIONS)

Includes both domestic and  
international spending

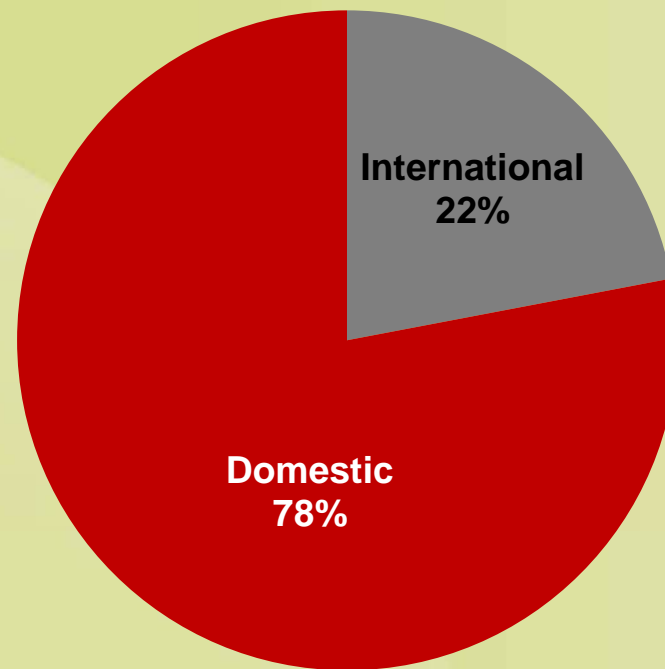


# DOMESTIC v. INTERNATIONAL

PERCENT OF ARRIVALS



PERCENT OF SPEND



# FACTS ABOUT TOURISM SPENDING

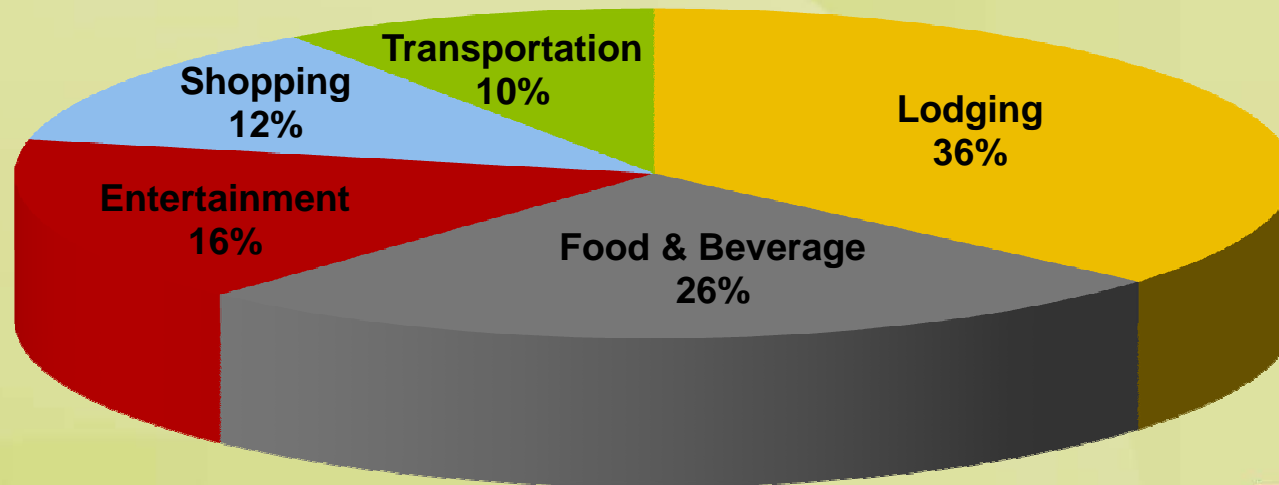
- ★ If tourism did not exist in Washington, DC, the District would need to generate an average of \$2,480 in local taxes from each of the 249,966 households in DC, in order to maintain the current level of tax receipts
- ★ Travel/tourism spending support 71,592 jobs annually (3%▲ from 2006)
- ★ Travel/tourism jobs support \$2.7 billion in wages (6%▲ from 2006)
- ★ Domestic spending alone topped \$4.4 billion in 2007

# 2007 TOP U.S. TOURISM DESTINATIONS

	Spending Index	Rank Change from 2006	Visitors Needed to Create a Job
New York City	6.96	+2	160
Orlando	6.62	-1	110
Las Vegas	6.30	-1	125
Los Angeles	4.05	0	200
Chicago	3.06	0	180
San Francisco	2.67	0	225
<b>Washington, DC</b>	<b>2.61</b>	<b>+1</b>	<b>195</b>
San Diego	2.52	-1	215
Miami	2.36	+3	65
Atlanta	2.17	-1	185

# DISTRIBUTION OF VISITOR SPENDING

Expenditure Category	2007	% Change
Lodging	2.0 billion	9% ↑
Food & Beverage	1.4 billion	8% ↑
Entertainment	917 million	6% ↑
Shopping	677 million	7% ↑
Transportation	532 million	3% ↑





# TAX REVENUE

Local Tax Revenue (\$)	
Corporate Income	33,526,859
Personal Income	30,104,349
Social Security & Other Taxes	515,705
Hotel Tax	206,900,000
Property Taxes	169,747,412
Excise & Fees	20,750,003
Sales Tax	158,426,684
Restaurant	99,414,207
Retail	51,520,880
Airport	7,491,597
Car Rental	2,714,691
<b>Local Total</b>	<b>620,971,012</b>

Federal Tax Revenue (\$)	
Corporate Income	38,027,678
Personal Income	42,811,705
Excise & Fees	60,980,406
Social Security & Other Taxes	192,742,224
<b>Federal Total</b>	<b>334,562,013</b>

**Local + Federal Total =  
\$ 954 million**

**(8% ↑ over 2006)**

# WHAT DOES A VISITOR MEAN TO DC?

★ **Each DC visitor generates about \$343 in expenditures:**

- *\$1,080 per International Visitor, \$276 per Domestic*
- *\$470 per Business Visitor, \$290 per Leisure*

★ **Every 226 visitors creates a new job in DC:**

- *only takes 71 international visitors*
- *or 165 business visitors*

★ **Each visitor creates about \$58 in tax receipts, \$37 of which goes to local government**

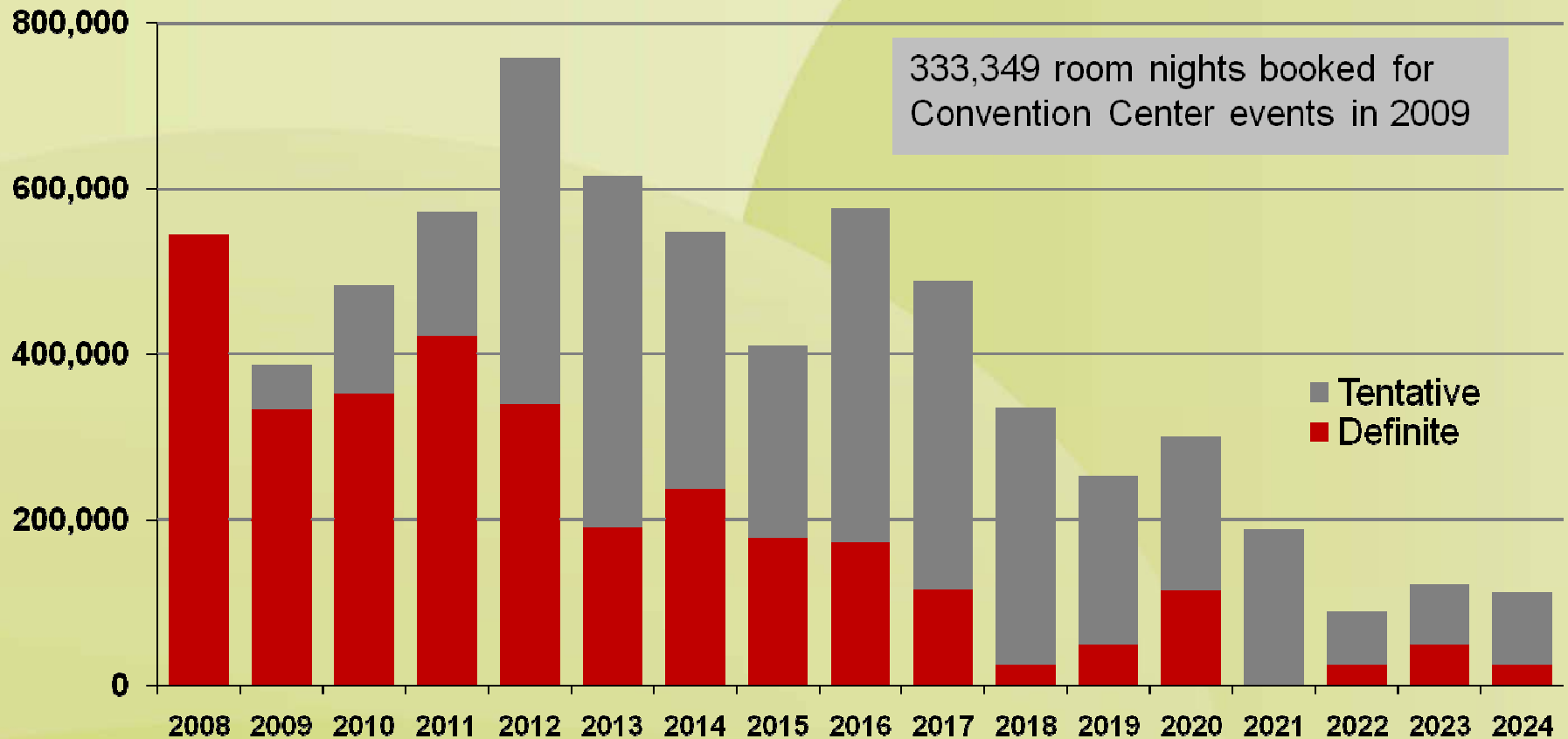
★ **Each visitor generates \$164 in wages, \$50 of which is paid to workers employed by tourism providers (indirect effect)**

★ **Each visitor adds about \$250 to Gross City Product**



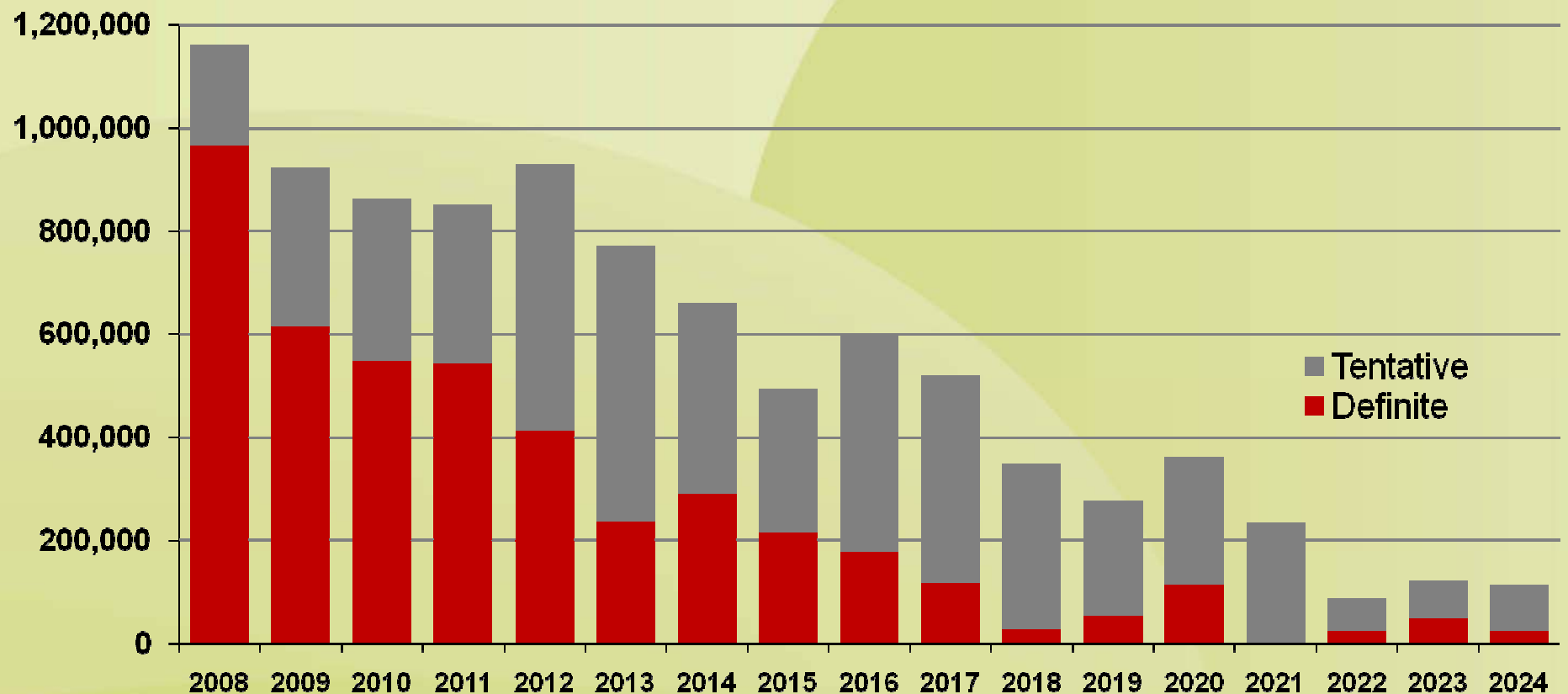
# CONVENTION CENTER BOOKINGS

WALTER E. WASHINGTON CONVENTION CENTER EVENTS  
(as of August 6, 2008)



# ALL MEETING LOCATIONS BOOKINGS

(as of August 6, 2008)



# TOP MEETINGS BOOKED IN FY '08

## (BY TOTAL ROOM NIGHTS)

Account Name	Meeting Name	Date (by year)	Total Attend.	Peak Rooms	Room Nights
Society for Neuroscience	Annual Convention	Nov. 2017 & Oct. 2020	25,000	10,000	54,100
American Academy of Family Physicians	Annual Meeting	Oct. 2014	17,000	6,000	30,500
American Society for Microbiology	General Meeting	June 2012	13,500	6,000	30,360
Envision EMI, LLC	Presidential Youth Inaugural Conference	January 2009	13,000	7,000	25,440
Cardiovascular Research Foundation	Transcatheter Cardiovascular	Sept .2022 & Oct .2024	12,000	5,300	24,098
Drug Information Association	Annual June National	June 2015	8,500	5,000	23,550
National Association for the Specialty Food Trade, Inc.	Intl. Fancy Food & Confection Show	July 2011	25,000	5,500	22,495
National Association of Realtors	Mid-Year Legislative Meeting & Trade Expo	May 2015	10,000	4,177	20,299
American Association for the Study of Liver Diseases	AASLD Annual Meeting	Nov. 2013 & Oct. 2017	6,000	4,000	17,560
Questex Media Group	AIIM and On Demand Conference & Expo	March 2011 & Feb. 2012	20,000	4,000	15,660



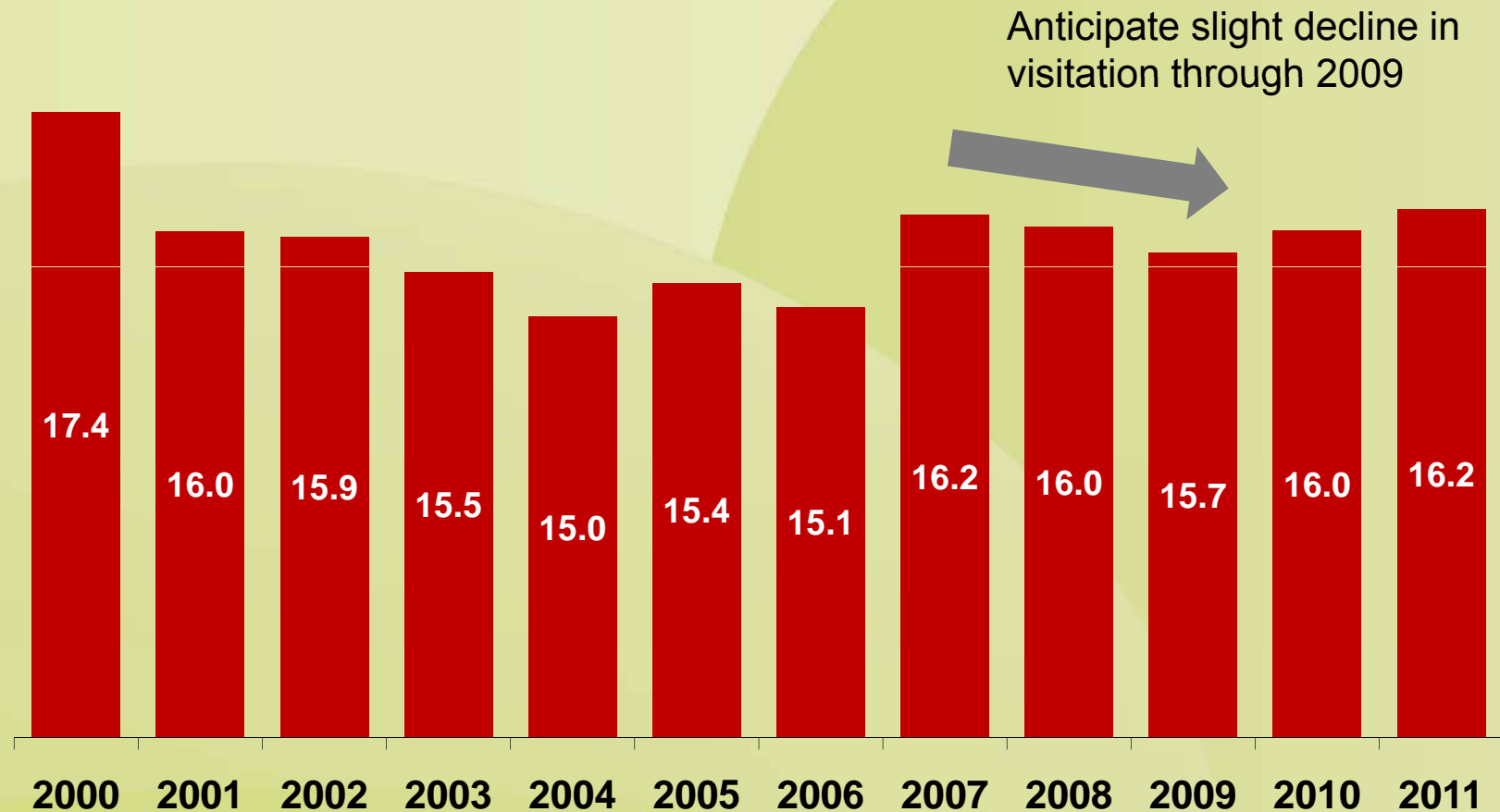
# LARGEST 10 CONVENTIONS IN FY '09

## (BY TOTAL ROOM NIGHTS)

Account Name	Meeting Name	Date	Total Attend.	Peak Rooms	Room Nights
Society for Neuroscience	Annual Convention	November 2008	35,000	10,000	58,700
American Society for Microbiology/Infectious Diseases Society of America	ICAAC/IDSA Joint Meeting	October 2008	15,000	9,000	47,700
Nat. Assn for the Education of Young Children	Annual National Convention	November 2009	12,000	7,500	28,275
American Chemical Society	Semi Annual Fall National Convention	August 2009	10,000	5,000	25,700
Envision EMI, LLC	Presidential Youth Inaugural Conference	January 2009	13,000	7,000	25,440
National Council of Teachers of Mathematics	Annual April North American Convention	April 2009	16,000	5,675	22,129
International Society for Technology in Education	National Educational Computing Conference	June 2009	18,000	5,500	21,405
Cardiovascular Research Foundation	TCT Annual Meeting	October 2008	12,000	4,400	20,894
National Cable & Telecomm. Association	The Cable Show	April 2009	17,000	5,000	20,050
National Association of Realtors	Mid-Year Legislative Meeting/Trade Expo	May 2009	10,000	4,175	19,701



# VISITATION FORECAST





# DRIVERS OF FORECAST

## Positive for DC Visitor Outlook:

- ⊕ *Overseas visits will continue to grow, albeit slower than the blistering pace of 2007* -dollar improving but still weak, economic growth in key origin markets remains positive, plus renewed interest in DC and other US destinations.
- ⊕ *2008 will be another excellent year for Canadian visitation* -their economy & currency continue to drive visitors to DC.
- ⊕ *UK growth will slow* -slight hangover from an excellent '07, pound-v-dollar is rising, and competitive destination inroads.
- ⊕ *Get ready for German reversal* -visits will grow markedly in response to an improving economy at home, renewed interest, and 2007 bounce back.

## Negative for DC Visitor Outlook:

- ⊕ *Real HH income is beginning to decline* -particularly in key DC origin markets
- ⊕ *Corporate P&Ls are weakening and job growth is sluggish* -cost containment puts more downward pressure on business travel
- ⊕ *Tightening Federal budgets further pressure government “business” travel*
- ⊕ *More domestic destinations are re-doubling their efforts while DC remains stagnant*
- ⊕ *Keep an eye on hotel & airline seat capacity* - limitations could slow things further



# METHODOLOGY

## VISITOR PROFILES: LONGWOODS INT'L

- ★ Largest ongoing study of American travelers
- ★ Surveying random cross-section of 500,000 panel members each quarter
- ★ In 2007, study included 230,846 trips nationally
- ★ For DC, study included 2,080 trips
- ★ Data is weighted to U.S. population

## VISITOR VOLUME: DK SHIFFLET & ASSOCIATES

- ★ Data collected via *DIRECTIONS*<sup>®</sup>, a mail and online panel of more than 75,000 respondents each year

## VISITOR FORECAST AND ECONOMIC IMPACT

- ★ Global Insight combines Longwoods and DK Shifflet data with economic variables, tax collections and other tourism indicators like airport arrivals, transportation and attractions attendance.

