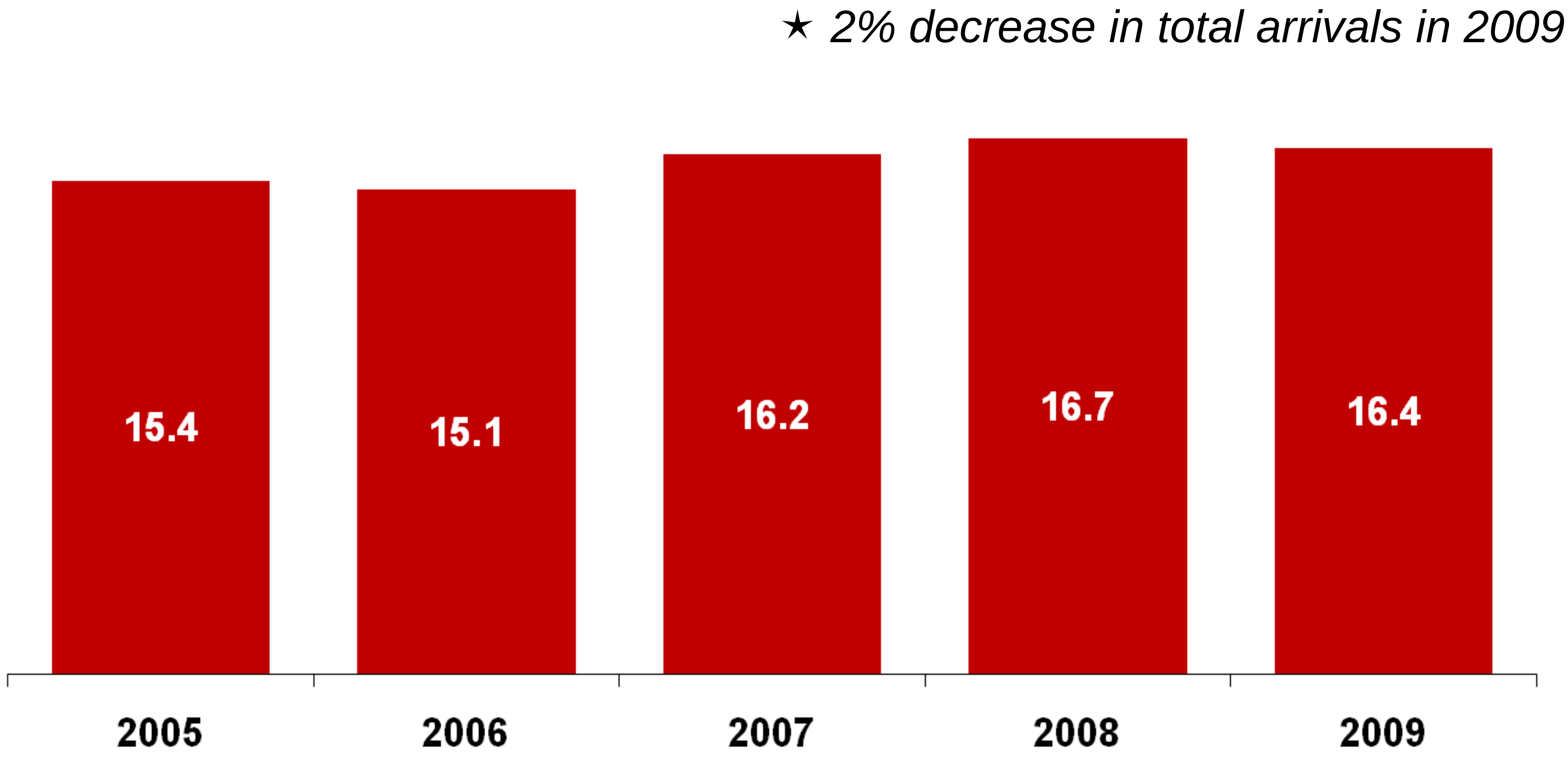
WASHINGTON DC's
2009 VISITOR STATISTICS

WASHINGTON DC™

DESTINATIONDC.COM

TOTAL VISITATION TO DC

(CITY-DEFINITION, IN MILLIONS)

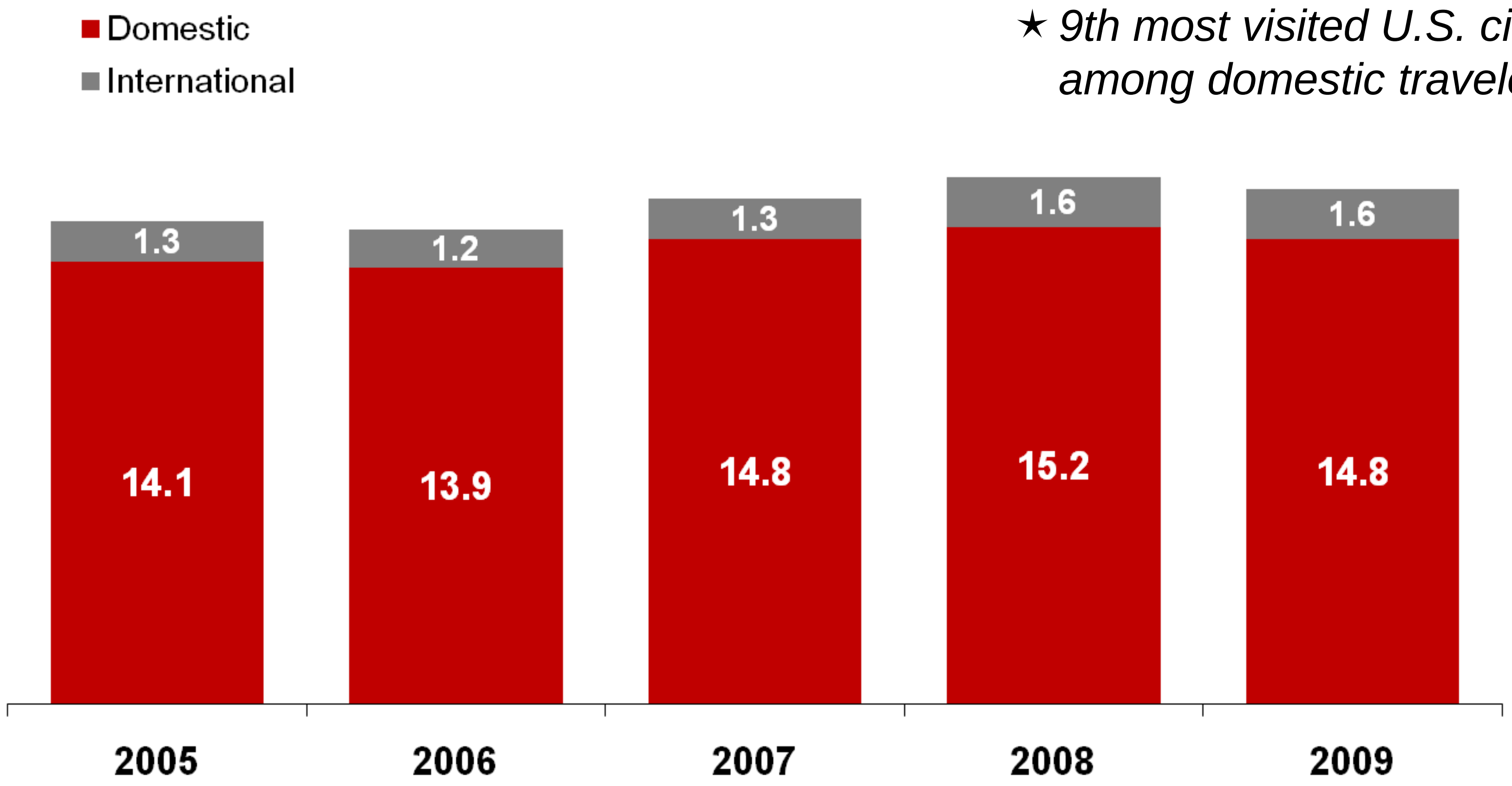


Source: DK Shifflet & Office Travel & Tourism Industries, Dept of Commerce

TOTAL VISITATION TO DC

(CITY-DEFINITION, IN MILLIONS)

★ *9th most visited U.S. city among domestic travelers*

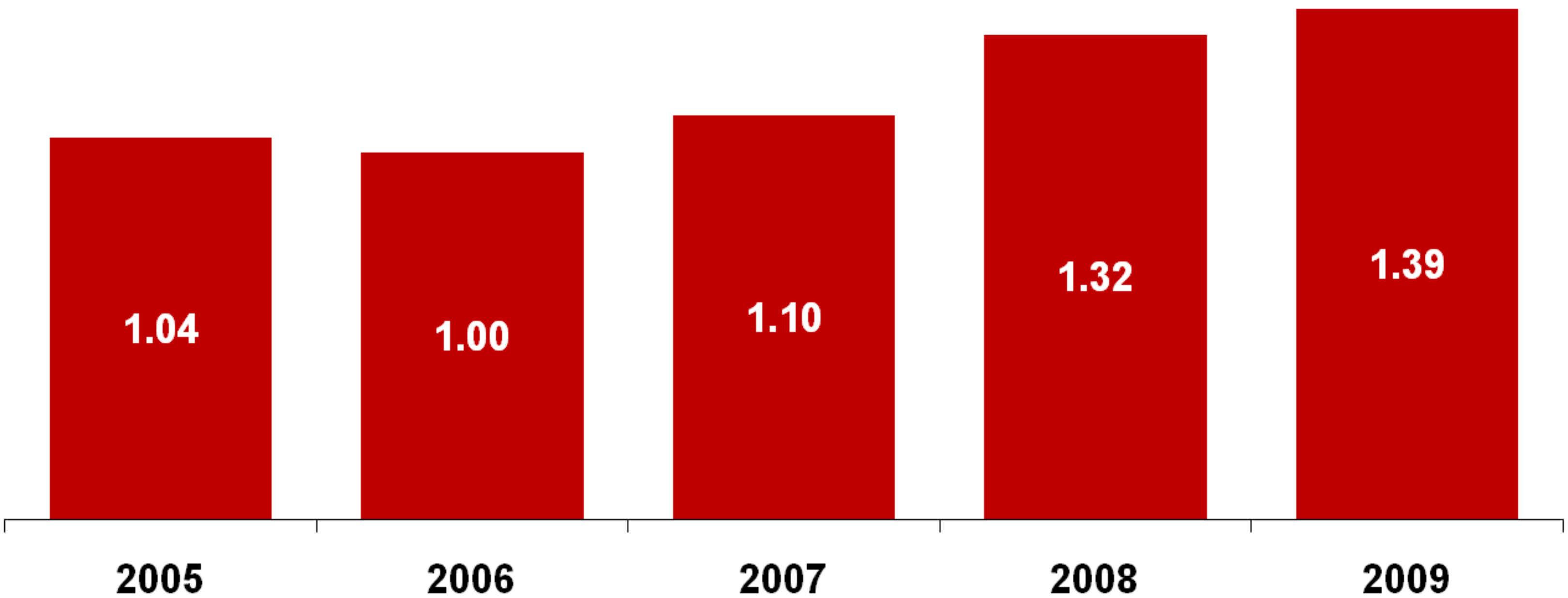


Source: DK Shifflet & Office Travel & Tourism Industries, Dept of Commerce

OVERSEAS VISITATION TO DC

(MSA DEFINITION, IN MILLIONS)

★ *5% increase in total arrivals in 2009*



Source: Office Travel & Tourism Industries, Dept of Commerce

OVERSEAS VISITATION

Destination (MSA)	2008	2009	2009 Visitation
New York City	1	1	7.7 M
Miami	4	2	2.6 M
Los Angeles	2	3	2.5 M
Orlando	5	4	2.4 M
San Francisco	3	5	2.2 M
Las Vegas	6	6	1.8 M
Washington, DC	8	7	1.54 M
Honolulu/Oahu	7	8	1.50 M
Boston	10	9	1.1 M
Chicago	9	10	600K

- ★ DC moved into #7 position, the first change in position since overseas tracking began in 1998
- ★ DC, Miami and Boston were only destinations in top 10 to see a positive growth in arrivals in 2009

Source: Office Travel & Tourism Industries, Dept of Commerce

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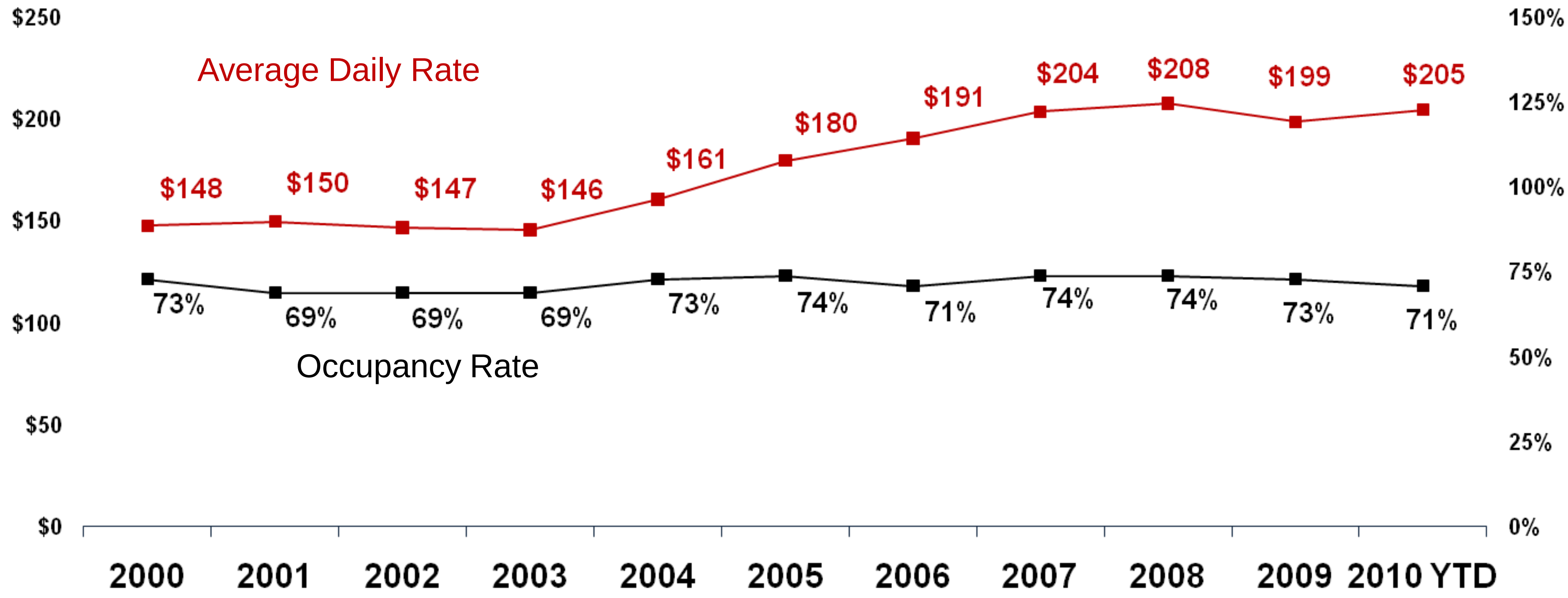
HOTEL STATISTICS

- ★ The first four months of the calendar year tend to have higher occupancy and ADR then the remainder of the calendar year, so we expect ADR to drop closer to $199 by year end.



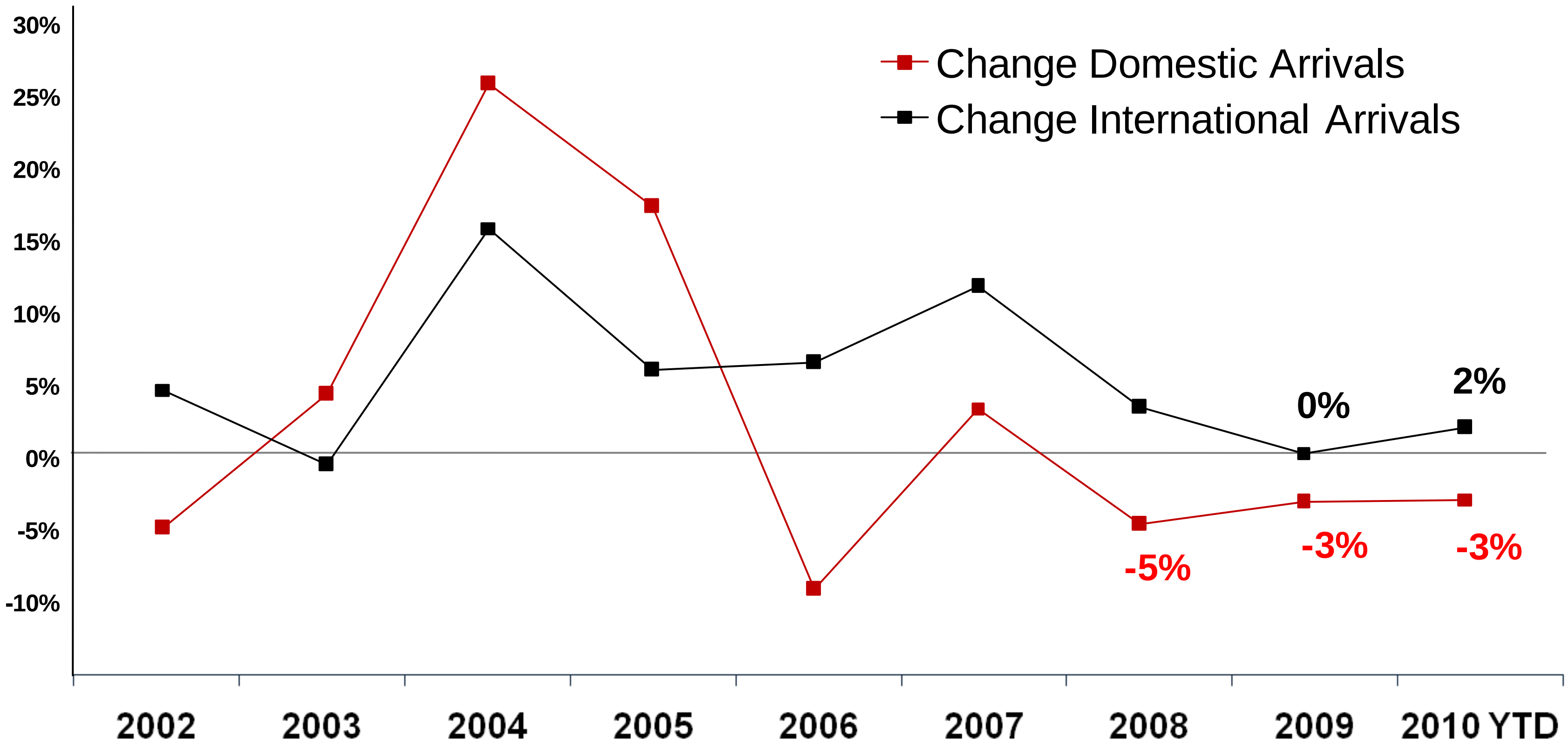
Source: Smith Travel Research, YTD thru April

ADDITIONAL TOURISM INDICATORS	2009	Percent Change 2008-09
National Park Service – Mall locations	22 million	0% ±
National Park Service – all DC area locations	44 million	6% ⬆
Smithsonian – Mall locations	25 million	24% ⬆
Smithsonian – all DC locations	30 million	20% ⬆
Total domestic arrivals (DCA+IAD)	17 million	-3% ⬇
Total international arrivals (DCA+IAD)	3 million	0% ±
WMATA Metro rail ridership	220 million	1% ⬆
Circulator ridership	4 million	42% ⬆

Source: National Park Service, Smithsonian, Metropolitan Washington Airport Authority, Washington Metro Area Transit Authority, Downtown BID

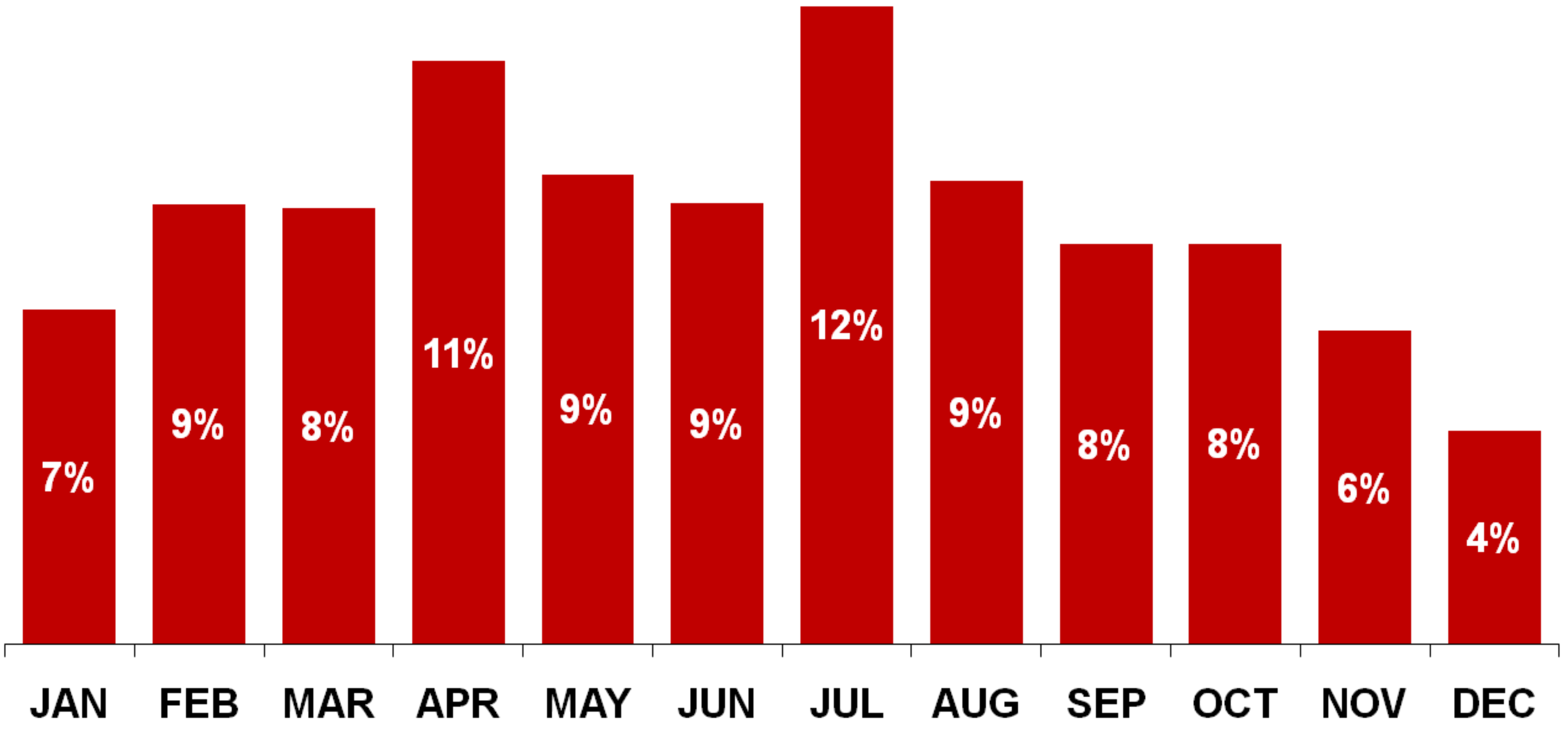
CHANGE IN AIRPORT ARRIVALS

(DULLES AND REAGAN)



Source: Metropolitan Washington Airport Authority, YTD thru March

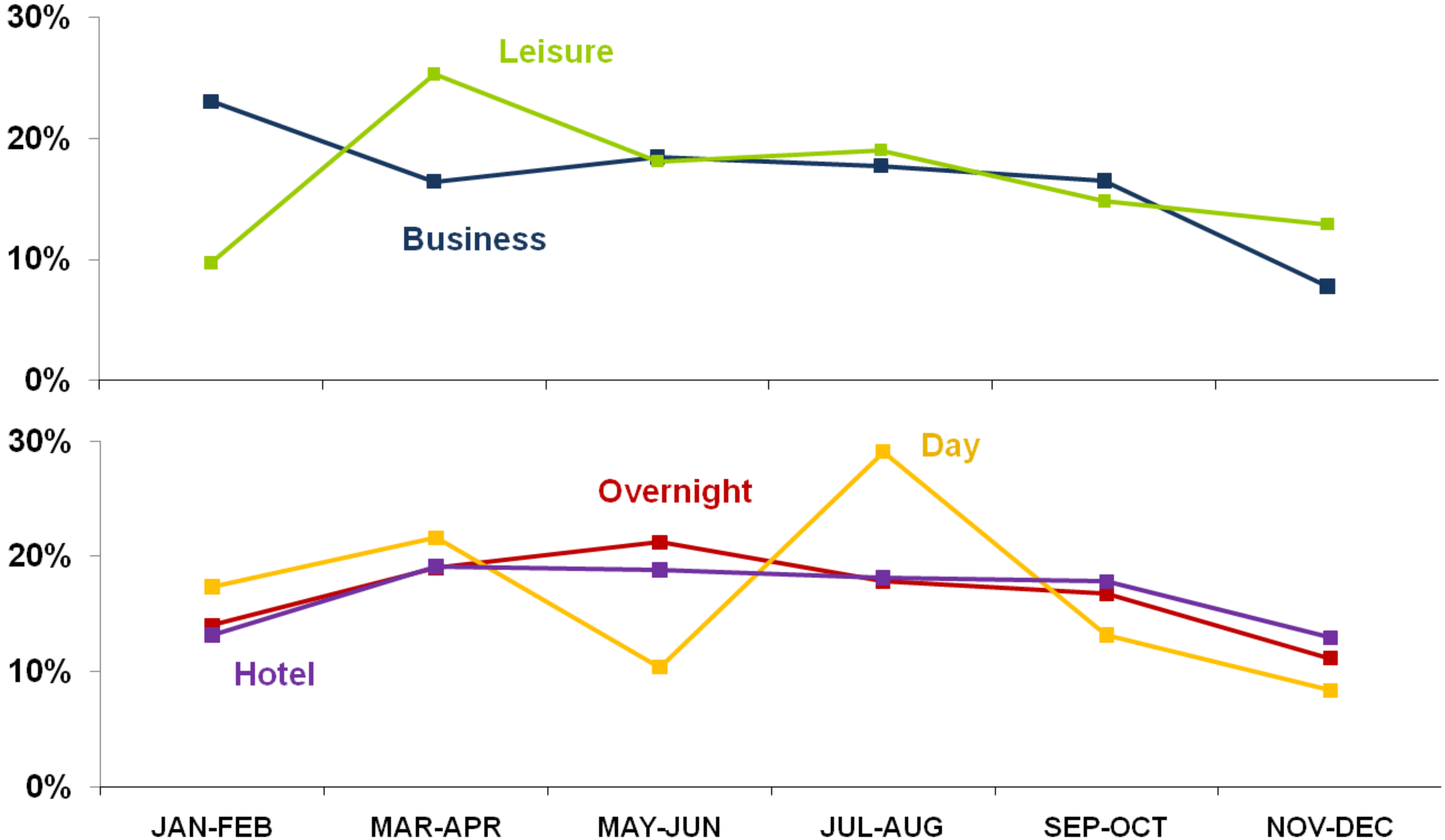
TOTAL VISITATION PEAKS IN APRIL AND JULY



Source: DK Shifflet

Data from 2008, not updated in 2009

LEISURE PEAKS IN MAR-APR

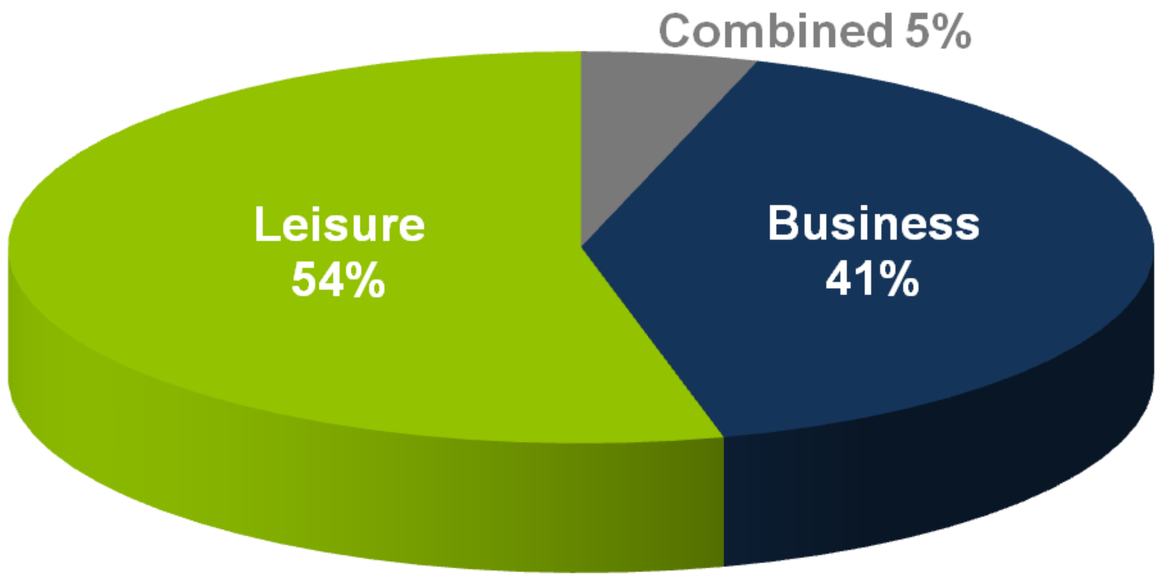


Source: DK Shifflet, Smith Travel Research

Data from 2008, not updated in 2009

PURPOSE OF DOMESTIC TRAVEL

(14.8 MILLION)



Among leisure…	
Visit friends/relatives	16%
General vacation	9%
Getaway weekend	8%
Other leisure	21%

Among business and combined…	
Convention/group meeting	19%
Other company business	27%

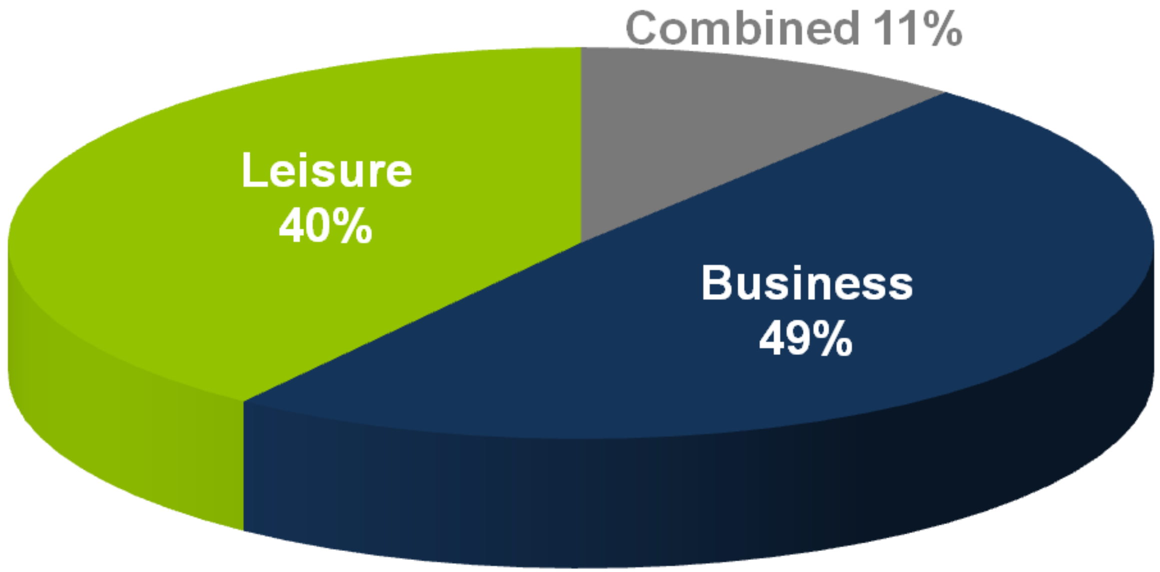
Source: DK Shifflet

DESTINATION DC

Data from 2008, not updated in 2009

PURPOSE OF DOMESTIC HOTEL STAYS

(12 MILLION)



Among leisure…	
General vacation	10%
Getaway weekend	10%
Visit friends/relatives	8%
Other leisure	13%

Among business and combined…	
Convention/group meeting	30%
Other company business	29%

Source: DK Shifflet

DC & NYC: TOP FEEDER MARKETS

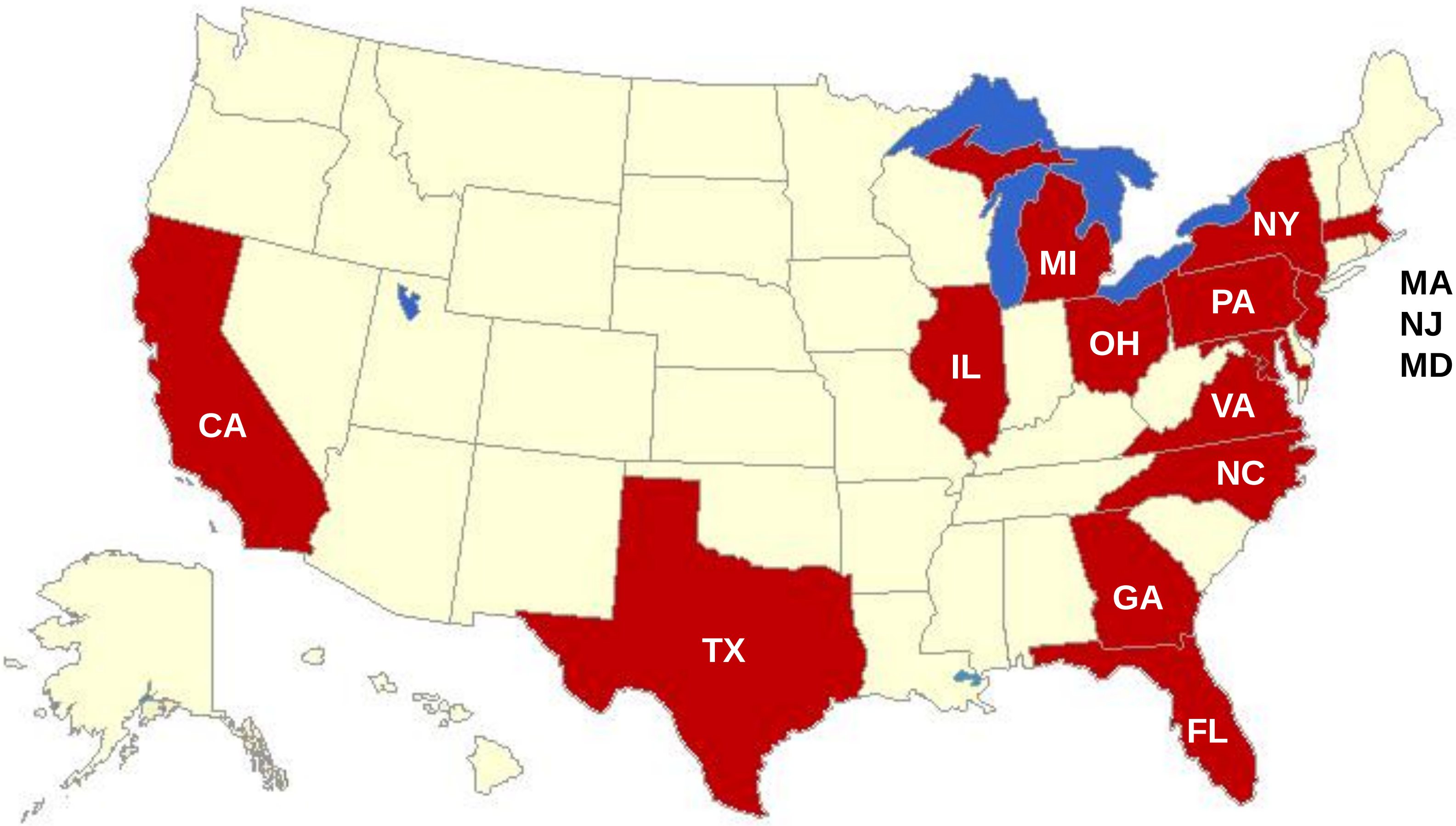
(DC VISITORS BY ORIGIN DMA)

RANK	ALL	BUSINESS	LEISURE
1	Washington, DC	Washington, DC	New York City
2	New York City	Los Angeles	Washington, DC
3	Richmond	New York City	Richmond
4	Baltimore	Richmond	Harrisburg (PA)
5	Philadelphia	Baltimore	Baltimore
6	Los Angeles	Norfolk (VA)	Raleigh-Durham
7	Harrisburg (PA)	Philadelphia	Philadelphia
8	Raleigh-Durham	Atlanta	Boston
9	Atlanta	Boston	Norfolk (VA)
10	Norfolk (VA)	Raleigh-Durham	Los Angeles

Source: DK Shifflet

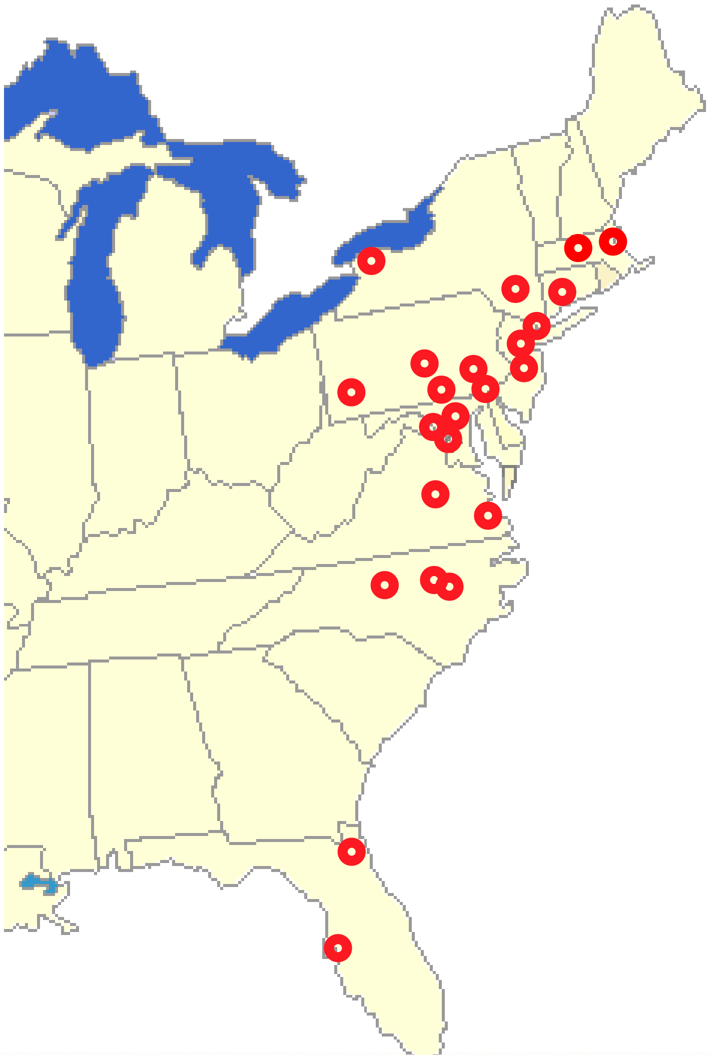
Data from 2008, not updated in 2009

80% OF VISITORS ORIGINATE FROM 14 STATES



Data from 2008, not updated in 2009

CITIES WITH GREATEST PROPORTION OF LEISURE VISITORS PER POPULATION ARE LOCAL & FLORIDA



Massachusetts: Boston, Worchester

Connecticut: Stamford

New York: Buffalo, Nassau/Suffolk, New York City

New Jersey: Edison, Newark

Pennsylvania: Harrisburg, Philadelphia, Pittsburgh, York

Delaware: Wilmington

Maryland: Baltimore, Bethesda

DC: Washington

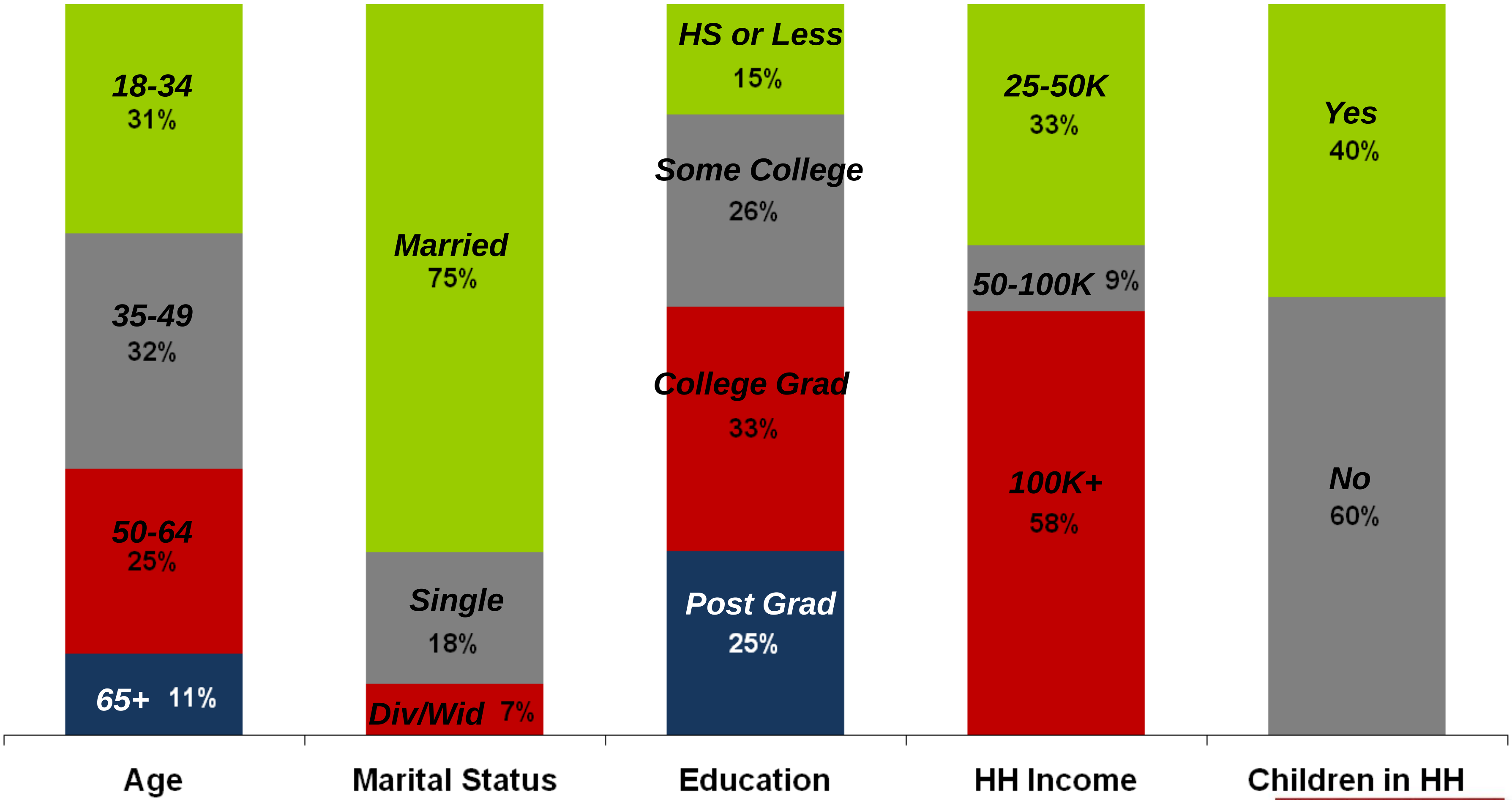
Virginia: Richmond, Virginia Beach

North Carolina: Durham, Greensboro, Raleigh

Florida: Jacksonville, Tampa

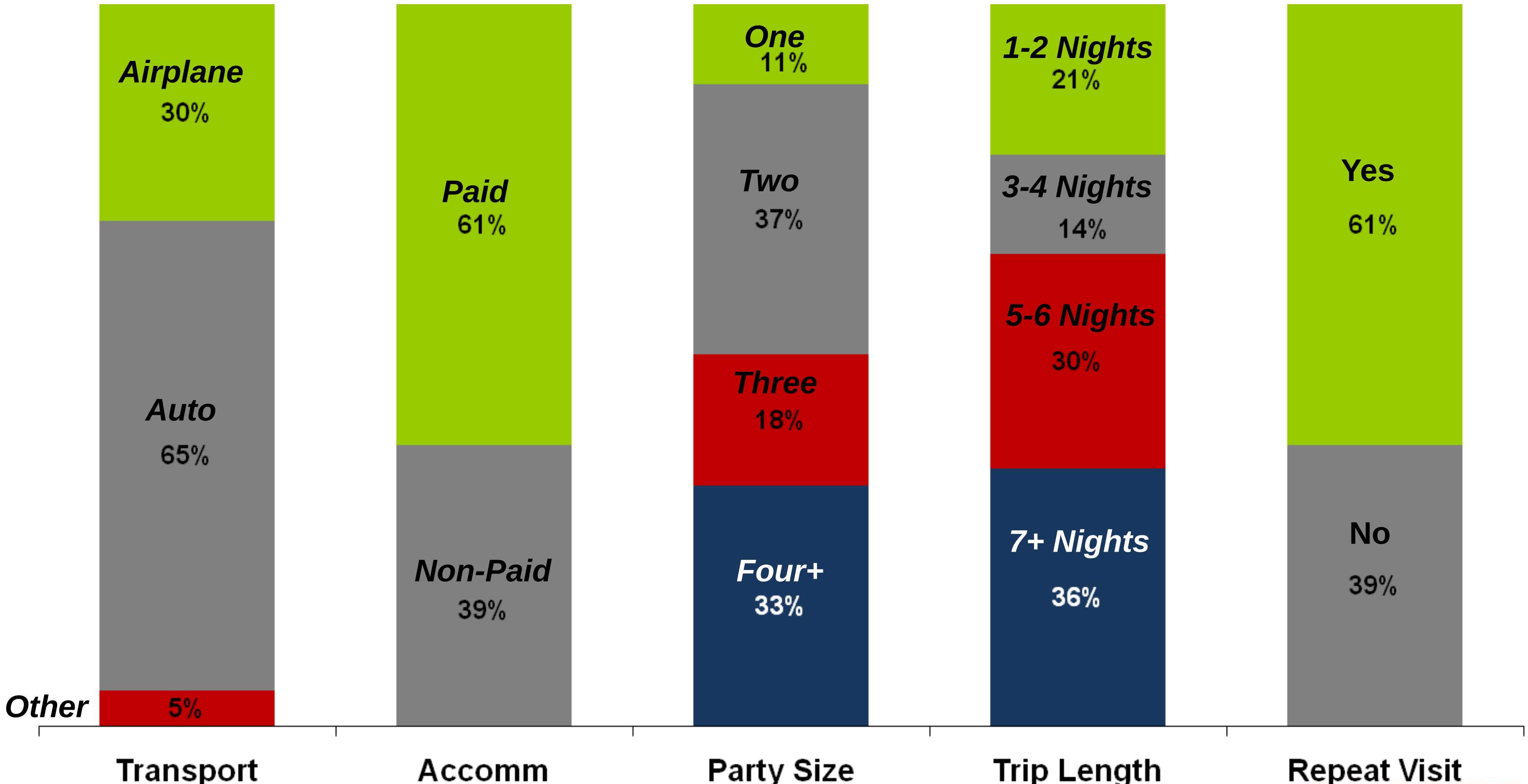
Data from 2008, not updated in 2009

DEMOGRAPHICS: OVERNIGHT-LEISURE VISITORS



Data from 2008, not updated in 2009

DEMOGRAPHICS: OVERNIGHT-LEISURE VISITORS



* Repeat within past 3 years

Data from 2008, not updated in 2009

DC'S OVERNIGHT-LEISURE VISITORS ARE GENERALLY…

CHARACTERISTIC	DC	Competitive Set	U.S.
More Highly Educated *% College grad+*	59%	49%	40%
Greater Incomes *% 100K+*	58%	29%	33%
More Likely to Fly	30%	28%	14%
Pay for Accommodation	61%	57%	56%
Longer Stays *% Stay 3+ Nights*	64%	47%	49%
Less Likely Repeat Visitors *% in past 3 years*	61%	70%	70%

* Primary competitors: Baltimore, Boston, Chicago, New York City, Philadelphia
Middle-Atlantic: destinations in DC, DE, MD, NJ, NY, PA, VA
All U.S. destinations
Excellent=top 3 box on 10-point scale

Data from 2008, not updated in 2009

DC SCORES ABOVE COMPETITION IN SATISFACTION

Percent Rated “Excellent” for Satisfaction
(All Visitors)

DESTINATION	2005	2008
Washington, DC	69%	80%
Primary Competitors	67%	73%
All Middle-Atlantic	59%	65%
All U.S.	59%	65%

★ Significant change since 2005

* Primary competitors: Baltimore, Boston, Chicago, New York City, Philadelphia
Middle-Atlantic: destinations in DC, DE, MD, NJ, NY, PA, VA
All U.S. destinations
Excellent=top 3 box on 10-point scale

Data from 2008, not updated in 2009

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DC'S OVERNIGHT-LEISURE VISITORS ARE GENERALLY…

CHARACTERISTIC	OVERNIGHT-LEISURE	DAY-LEISURE
Married	75%	65%
No Children in HH%	60%	44%
More Highly Educated *% College grad+*	85%	60%
Greater Incomes *% 100K+*	58%	10%
Smaller Party Sizes *% 3+ Party Size*	51%	67%
Less Likely Repeat Visitors *% in past 3 years*	39%	46%
More Satisfied *% score 9-10 on 10-point scale*	60%	45%
Score DC on Value *% score 9-10 on 10-point scale*	37%	49%

Data from 2008, not updated in 2009

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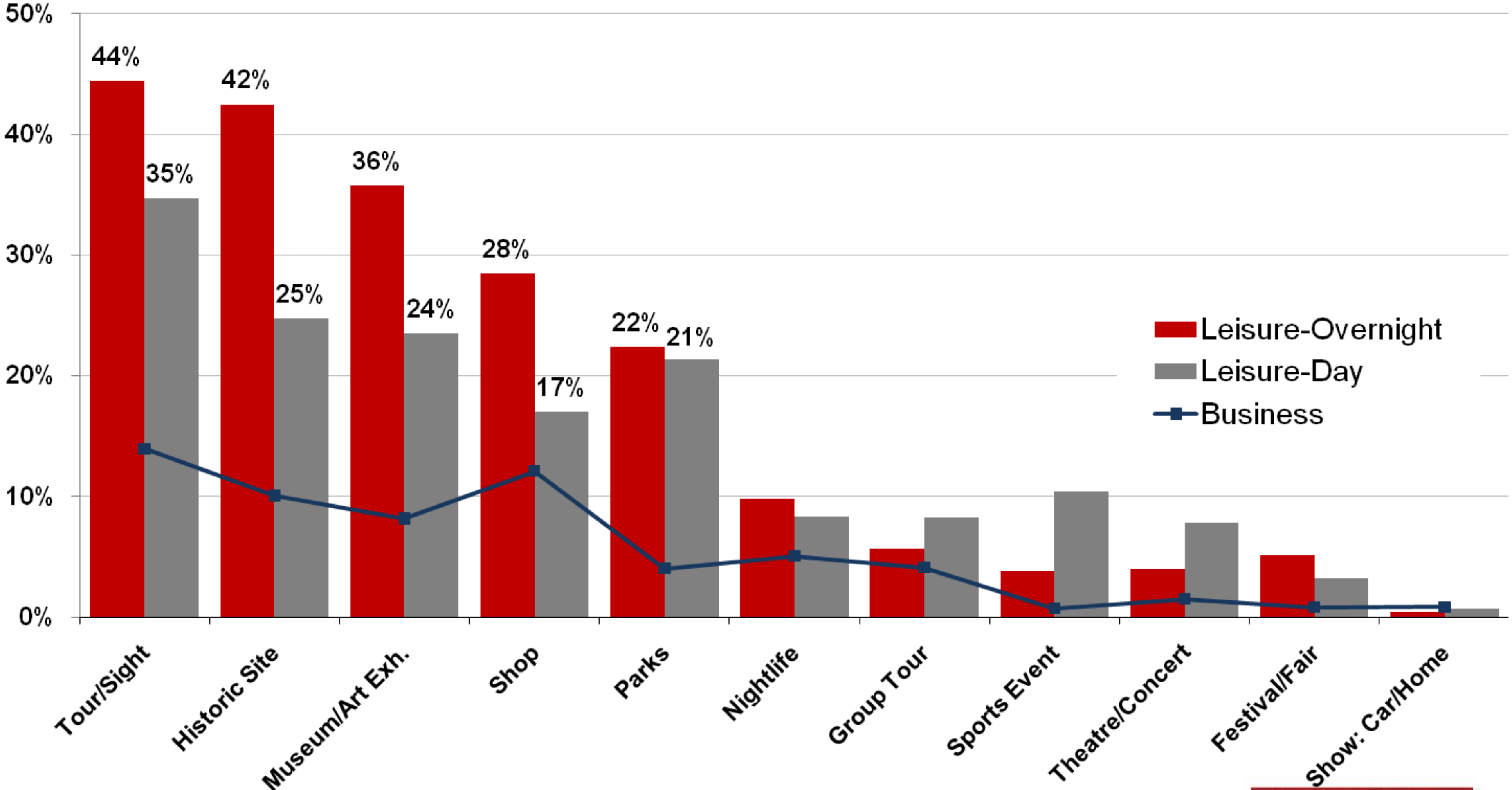
OVERNIGHT VISITORS

- ★ Average # nights in DC: 3.0
- ★ Average travel party size: 2.6

Data from 2008, not updated in 2009

LEISURE ACTIVITIES



Data from 2008, not updated in 2009

INT'L ARRIVALS TO U.S.

- ★ The global economic downturn in 2009 created the "most difficult year for U.S. travel and tourism industries since 9/11" according to the Department of Commerce
- ★ 54.9 million visitors to U.S. in 2009, a -5% change from 2008
  - – 2009 was the first negative year-over-year change since 2003
  - – Compared to 2008, the U.S. welcomed an alarmingly fewer number of travelers from the United Kingdom (-15%), Japan (-10%), Germany (-5%), Canada (-5%), Mexico (-4%), Italy (-3%), France (-3%) and Korea (-2%)
  - – The one bright spot was a 16% increase from Brazil
- ★ $121 billion in total international spending (a significant drop from the record of $142 billion in 2008)
  - – Much of this decline was due to the $4.6 billion decline in spending from U.K.
  - – All countries and regions reported declines, except Brazil (+2%)

Source: Office Travel & Tourism Industries, Dept of Commerce

INT'L ARRIVALS TO U.S. – BY MONTH

MONTH	TOTAL VISITATION	% CHANGE
January	3,092,686	-9.1
February	2,902,016	-11.5
March	3,768,230	-19.9
April	4,199,977	3.0
May	3,833,703	-11.8
June	3,622,363	-10.5
July	5,067,649	-6.0
August	5,404,906	-3.7
September	4,098,541	-1.1
October	4,046,461	0.6
November	3,599,758	1.5
December	4,107,573	5.1

INT'L VISITATION TO THE U.S.

TOP 10 MARKETS	ARRIVALS	SPENDING ($)
Canada	18.0 M (-5%)	16.2 B (-13%)
Mexico	13.2 M (-4%)	8.3 B (-14%)
United Kingdom	3.9 M (-15%)	12.1 B (-27%)
Japan	2.9 M (-10%)	12.9 B (-11%)
Germany	1.7 M (-5%)	5.6 B (-16%)
France	1.2 M (-3%)	4.2 B (-12%)
Brazil	0.9 M (+16%)	4.2 B (+2%)
Italy	0.8 M (-3%)	-----
South Korea	0.7 M (-2%)	-----
Australia	0.7 M (+5%)	3.3 B (-11%)
India	-----	3.6 B (-16%)
China	-----	3.5 B (-3%)

Source: Office Travel & Tourism Industries, Dept of Commerce

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INT’L ARRIVALS TO CRUSA

- ★ Record number of arrivals at 1,853,000 million overseas arrivals to CRUSA (+6%)
- ★ Total market share increased from 6.9% to 7.8%
- ★ Stronger growth in CRUSA (+6%) than in U.S. (-5%)
  - – Arrivals and market share increased for Germany, Australia, Spain and Brazil
  - – Decreased from France, Japan, Italy, Netherlands
- ★ 1 million overseas travelers visited CRUSA for leisure, up 9% from 2008
- ★ Spending in CRUSA up +5% to $1.33 billion
- ★ Ave. length of stay increased from 7.4 nights to 7.7. nights

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INT'L DIRECT AIR SERVICE

42 Destinations

23 Carriers

458 Weekly Departures

Addis Ababa
Amsterdam
Antigua
Aruba
Beijing
Bogota
Brussels
Buenos Aires
Cancun
Copenhagen
Dammam
Doha
Dubai*
Dublin
Frankfurt
Guatemala City
Halifax
Jeddah
Johannesburg
Kuwait City
London
Madrid
Mexico City
Montréal
Moscow_DME*
Moscow-SVO
Munich
Ottawa
Panama City
Paris
Rio de Janeiro
Riyadh
Rome
San Salvador
São Paulo
Seoul
St. Maarten
Tokyo
Toronto
Vancouver
Vienna
Zürich

OVERSEAS VISITATION

(MSA DEFINITION)

	2008	2009	2009 Visitation
New York City	1	1	7.8M
Miami	4	2	2.6M
Los Angeles	2	3	2.5M
Orlando	5	4	2.4M
San Francisco	3	5	2.2M
Las Vegas	6	6	1.8M
Washington, DC	8	7	1.54M
Honolulu/Oahu	7	8	1.49M
Boston	10	9	1.1M
Chicago	9	10	1.1M

★ In 2009, DC jumped the #7 position, the first move in ranking since overseas tracking began in 1998

★ East coast cities saw increases in rank (Miami, Orlando, DC and Boston)

Source: Office Travel & Tourism Industries, Dept of Commerce

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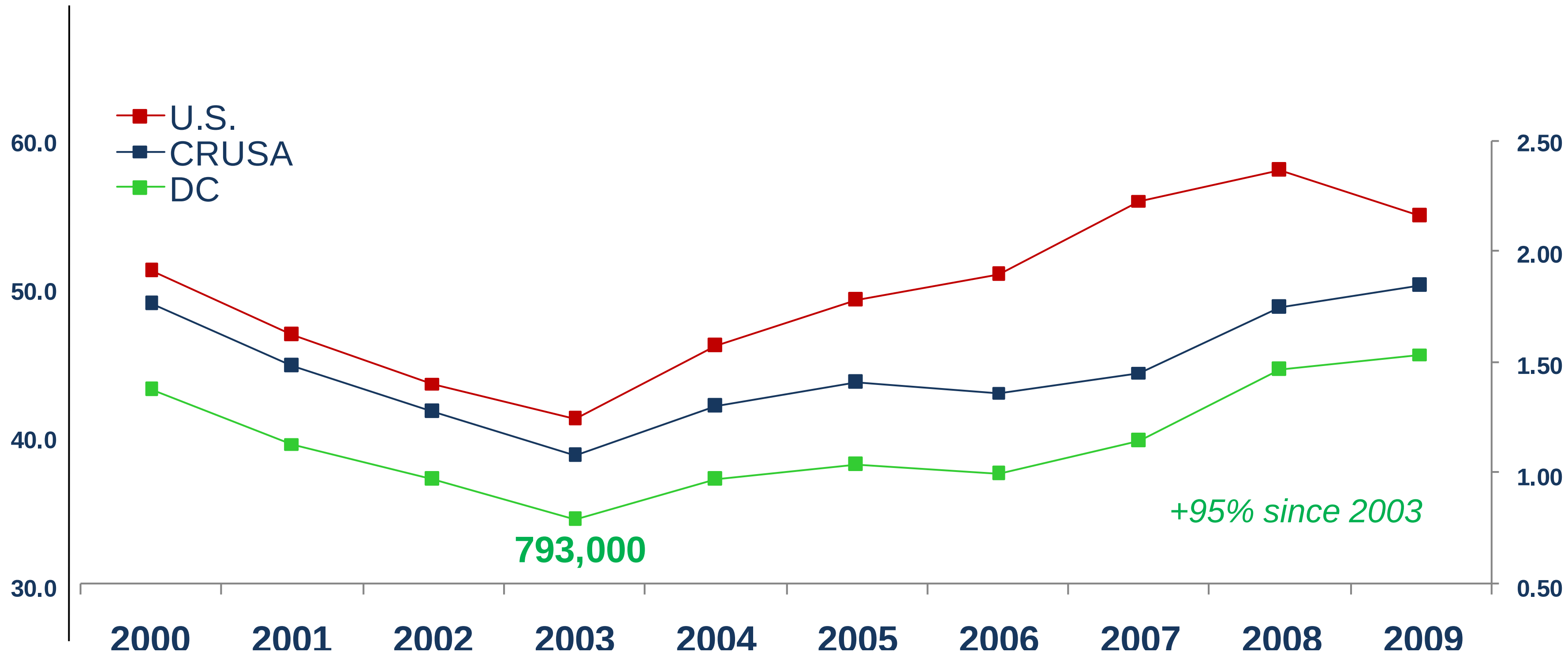
OVERSEAS VISITATION TO UNITED STATES, CRUSA & DC

(IN MILLIONS)

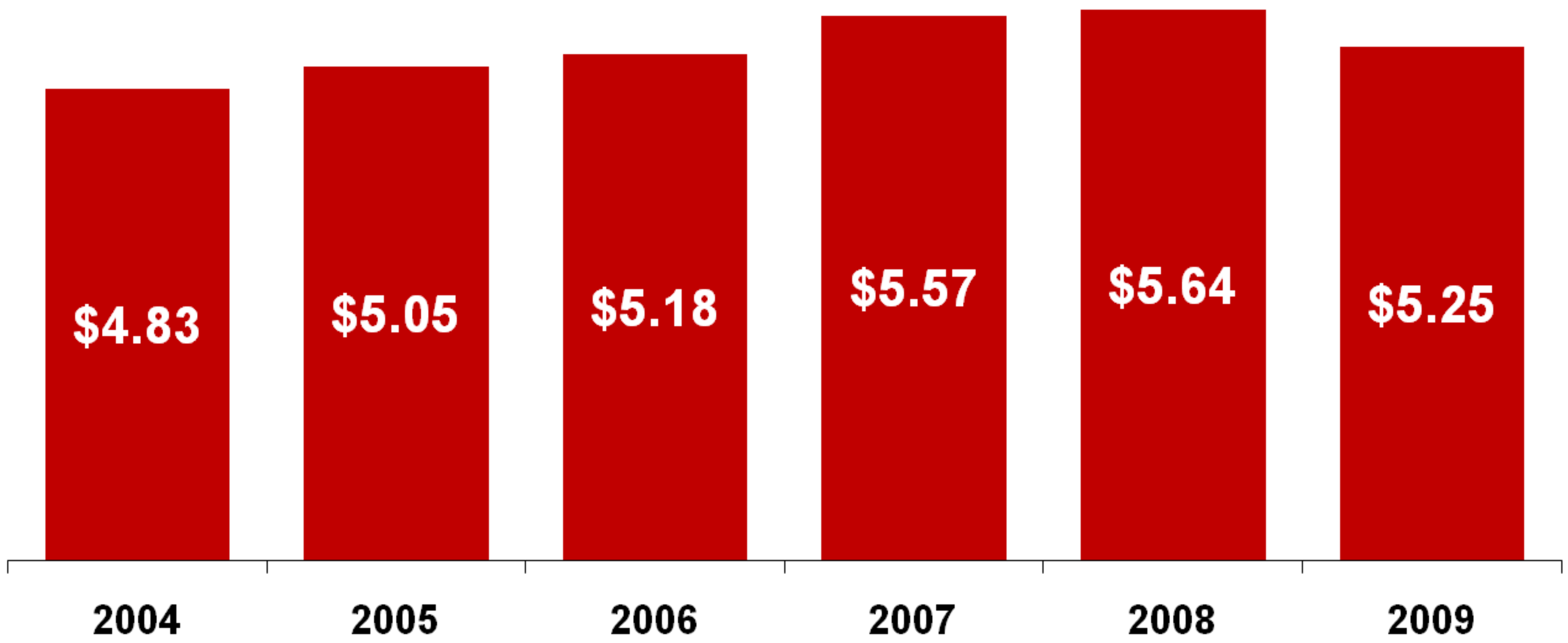


Source: Office Travel & Tourism Industries, Dept of Commerce

VISITOR SPENDING

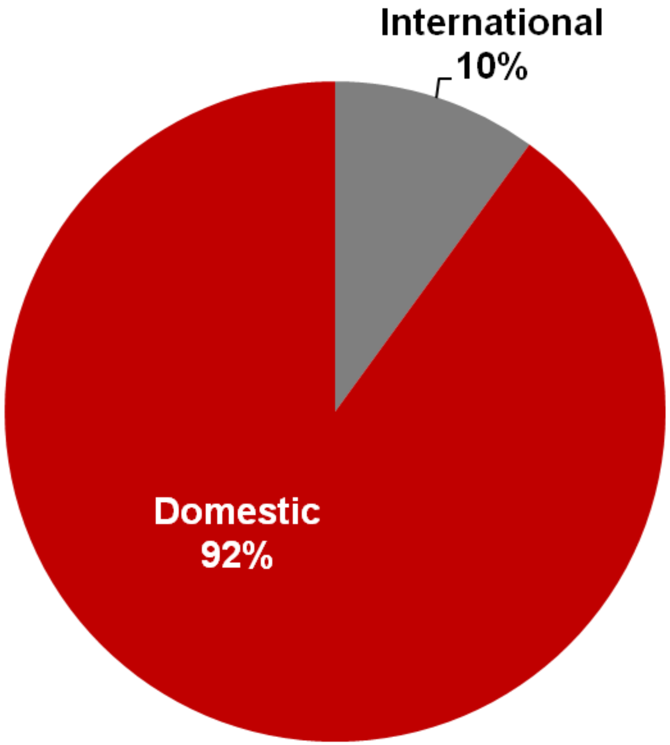
(IN BILLIONS)

Includes both domestic and international spending

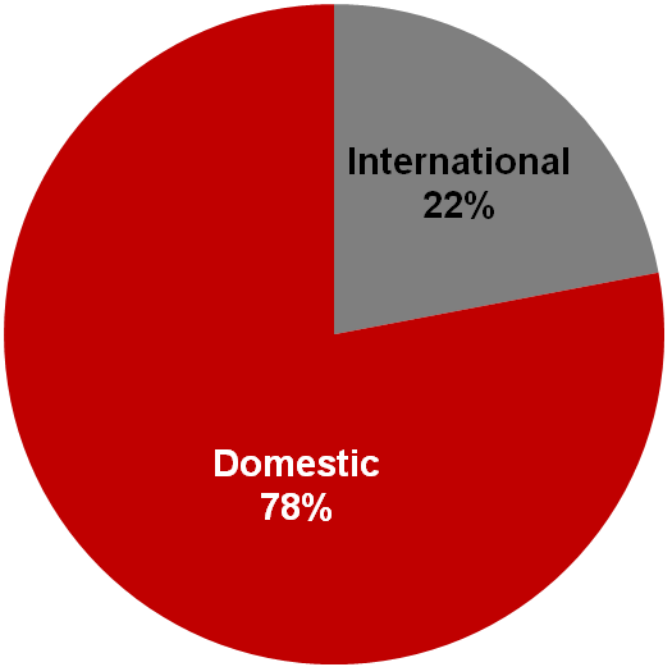


DOMESTIC v. INTERNATIONAL

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 **$2,306 in local taxes** from each of the 252,394 households in DC, in order to maintain the current level of tax receipts
- ★ Travel/tourism spending support **66,706 jobs** annually (0% from 2008)
- ★ Travel/tourism jobs support **$2.6 billion in wages** (4%⬇ from 2008)
- ★ Domestic spending down 5%⬇ to **$4.0 billion**, but international spending down 3%⬇ to **$1.2 billion** in 2009

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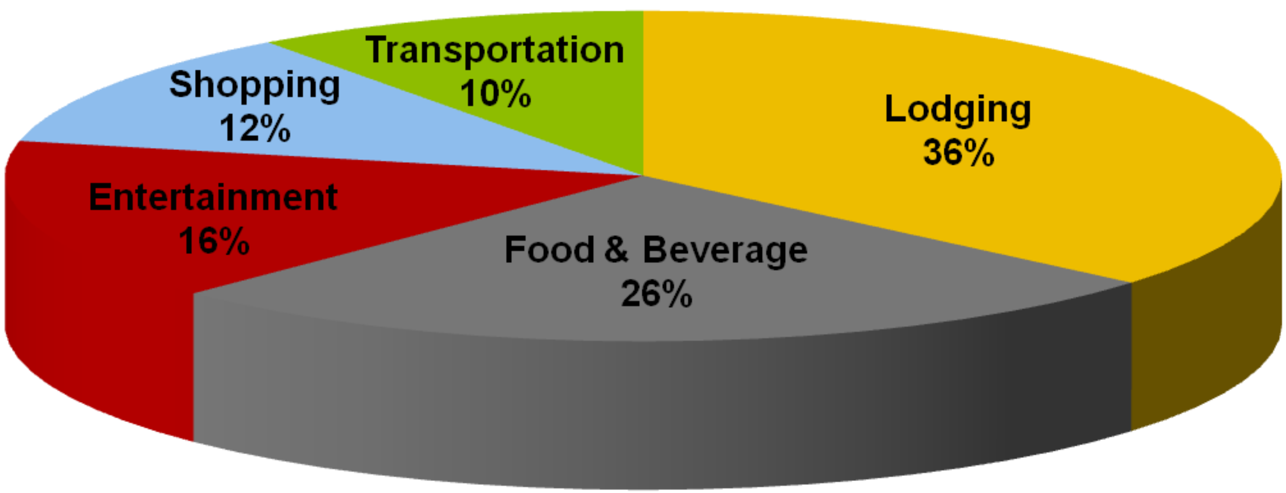
DISTRIBUTION OF VISITOR SPENDING

Expenditure Category	2009	% Change
Lodging	1.9 billion	-5% ⬇
Food & Beverage	1.4 billion	-7% ⬇
Entertainment	806 million	-10% ⬇
Shopping	574 million	-12% ⬇
Transportation	513 million	-9% ⬇



TAX REVENUE

Local Tax Revenue ($)	
Corporate Income	31,801,614
Personal Income	26,639,202
Social Security & Other Taxes	521,999
Hotel Tax	197,216,786
Property Taxes	157,934,012
Excise & Fees	18,155,755
Sales Tax	152,720,321
Restaurant	97,822,850
Retail	44,964,560
Airport	7,083,476
Car Rental	2,849,434
Local Total	**584,989,689**

Federal Tax Revenue ($)	
Corporate Income	36,070,828
Personal Income	37,891,322
Excise & Fees	49,557,451
Social Security & Other Taxes	189,524,913
Federal Total	**313,044,514**

Local + Federal Total = $898 million

-6%⬇ change from 2008

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WHAT DOES A VISITOR MEAN TO DC?

- ★ **Each DC visitor generates about $323 in expenditures**:
- ★ **Every 244 visitors creates a new job in DC:**
- ★ **Each visitor creates about $58 in tax receipts**, $36 of which goes to local government
- ★ **Each visitor generates $159 in wage**s
- ★ **Each visitor adds about $243 to Gross City Product**

TOP BOOKINGS FY '09

(BY TOTAL ROOM NIGHTS)

Account Name	Meeting Name	Meeting Date	Total Attend.	Peak Rooms	Room Nights
International AIDS Society	International Conference	7/22/2012	30,000	9,000	55,000
American College of Surgeons	Annual Clinical Congress	10/16/2016	15,000	8,500	42,500
American Library Association	Summer National Conv.	June 2010 & 2025	26,000	8,500	39,950
American Thoracic Society	International Conference	May 2017 & 2023	30,000	7,275	35,711
The Army & Naval Academy Athletic Associations	Army-Navy Game (2010-2014)	12/7/2011	70,000	15,244	35,000
Association for Supervision & Curriculum Development	Annual Conference & Exhibit Show	3/23/2024	15,000	7,500	32,100
Microsoft Corporation	Worldwide Partner Conf.	7/12/2010	10,000	5,000	29,150
Nat. Council of Teachers of Math.	Annual North Am. Conv.	4/26/2018	16,000	6,500	29,150
National Association for the Education of Young Children	Annual National Convention	Nov. 2018 & 2022	20,000	7,500	28,275
Cardiovascular Research Foundation	Transcatheter Cardio. Therapeutics	Oct. 2026, 2028 & 2030	12,000	5,300	24,098

LARGEST 10 CONVENTIONS IN FY '10

(BY TOTAL ROOM NIGHTS)

Account Name	Meeting Name	Meeting Date	Total Attend.	Peak Rooms	Room Nights
American College of Surgeons	Annual Clinical Congress	Oct. 2010	15,000	8,500	42,500
American Library Association	Summer National Conv.	June 2010	26,000	8,500	40,784
Am. Ass'n for Cancer Research	Annual Meeting	Apr. 2010	9,000	7,000	32,970
Microsoft Corporation	Worldwide Partner Conf.	July 2010	10,000	5,000	29,150
Am. Association of Orthodontists	Annual Convention	May 2010	21,000	5,000	24,650
Drug Information Association	Annual National Conv.	June 2010	8,500	5,000	23,550
Cardiovascular Research Foundation	Transcatheter Cardio. Therapeutics	Sept. 2010	11,000	5,155	22,559
American Association of Critical-Care Nurses	National Teaching Institute & Critical Care Exposition	May 2010	9,700	4,500	20,745
National Association of Realtors	Mid-Year Legislative Meeting and Trade Expo	May 2010	10,000	4,175	19,701
Association of the U.S. Army	Annual Meeting	Oct. 2010	20,000	3,000	13,800

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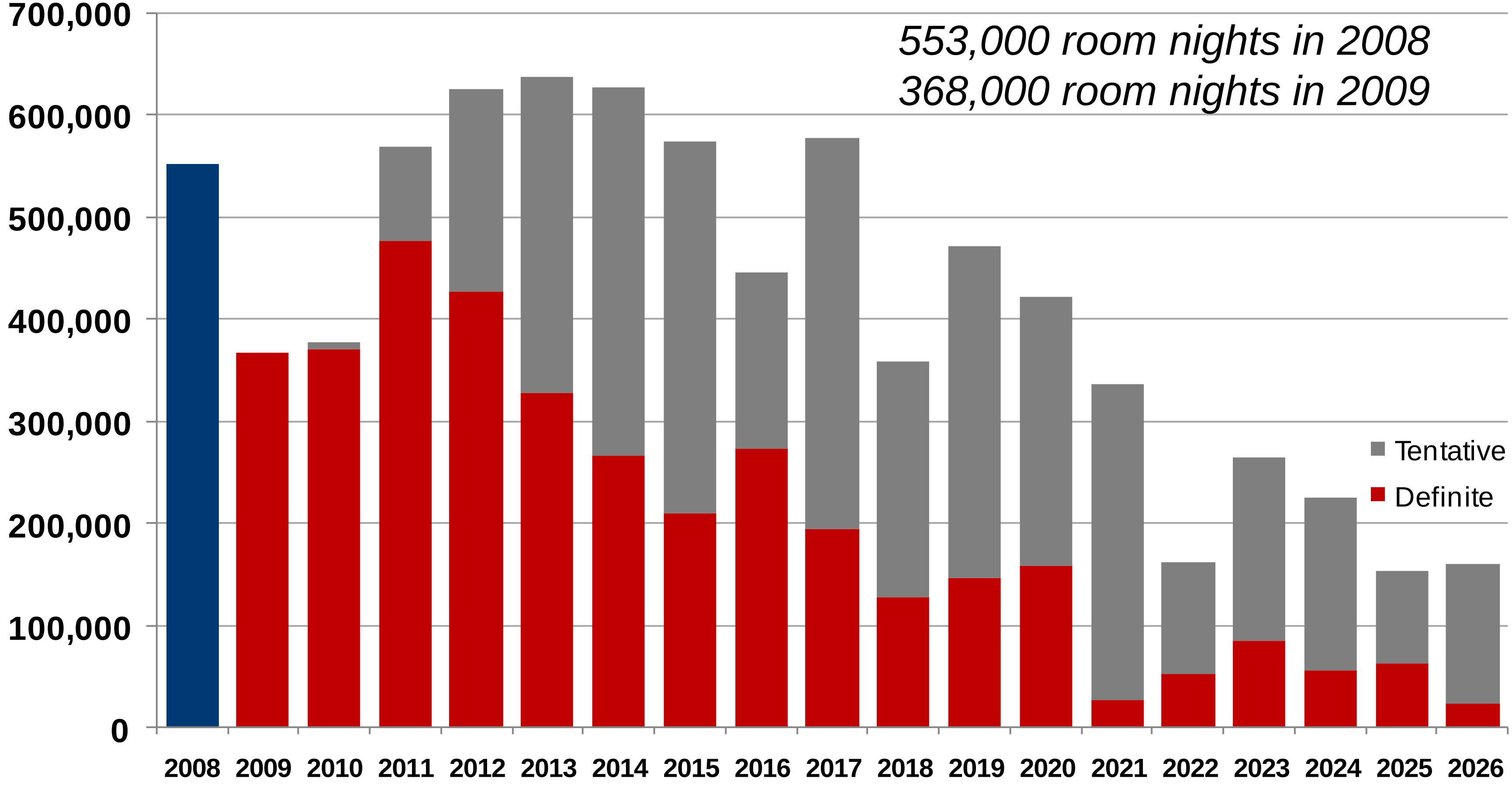
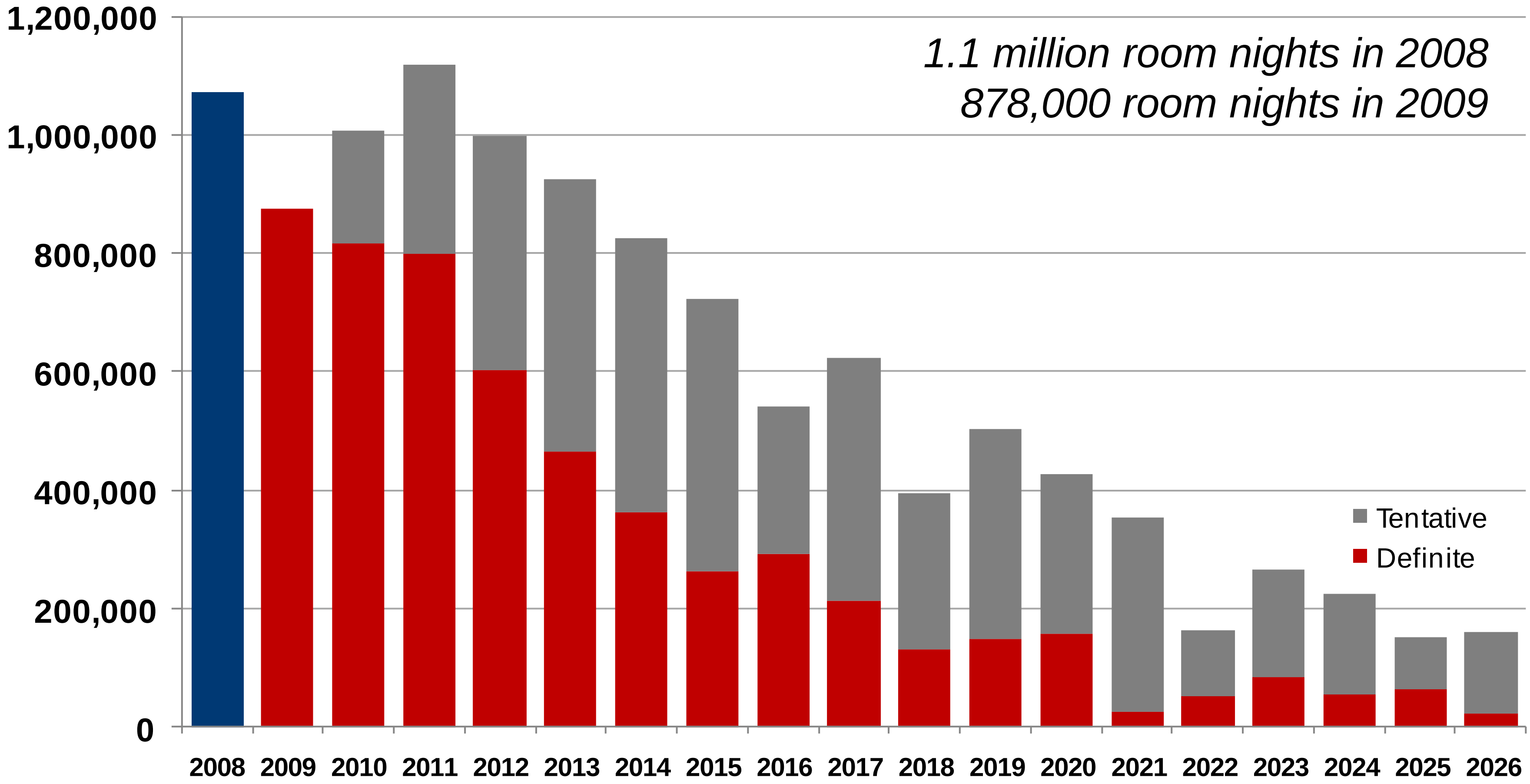
CONVENTION CENTER BOOKINGS

(AS OF MAY 31, 2010)



ALL LOCATIONS BOOKINGS

(AS OF MAY 31, 2010)



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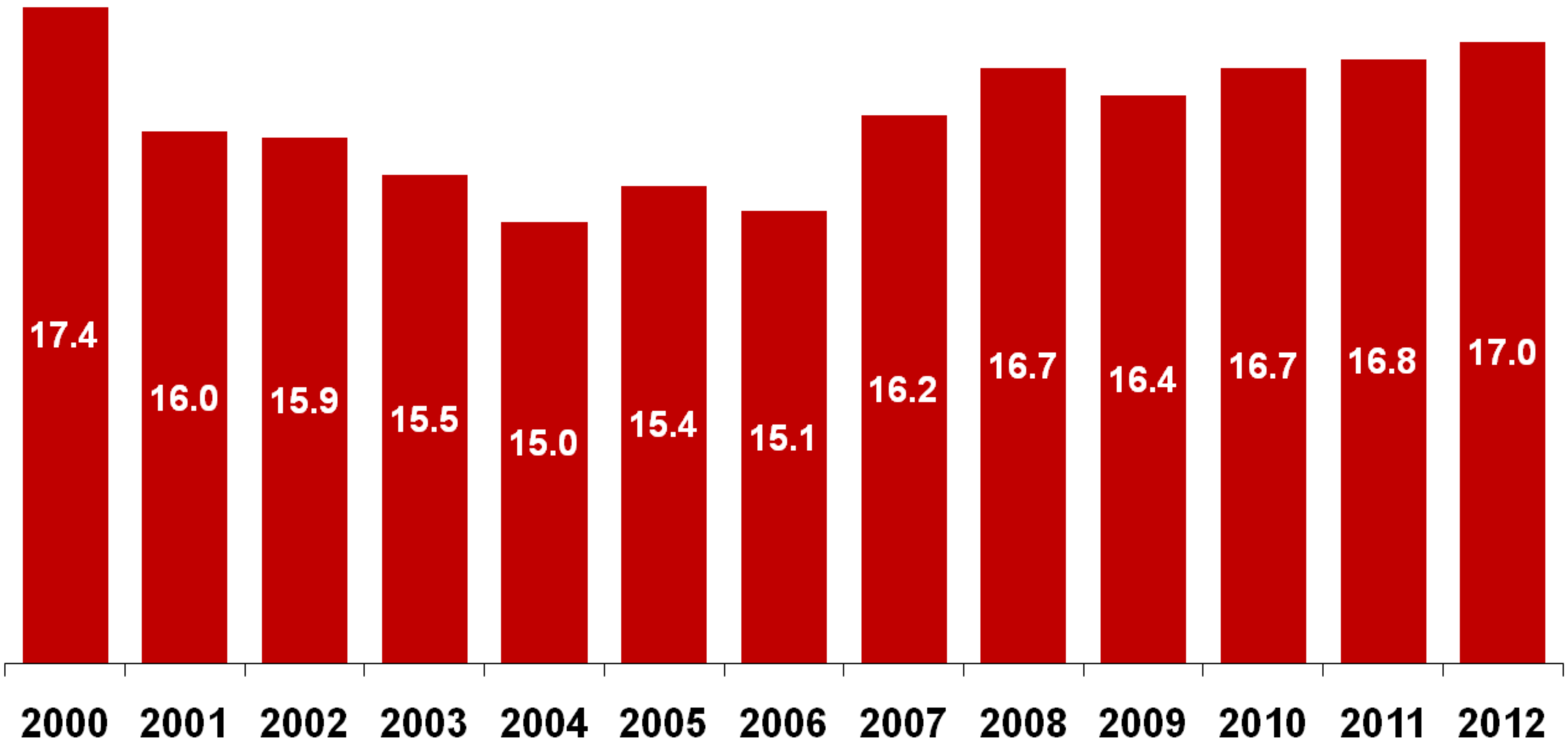
VISITATION FORECAST

★ DC's total visitor volume still lags behind all-time high from 2000



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FORECAST INSIGHTS

- ★ The Mid-Atlantic economy has suffered relative to other regions. As DC's most important source market for visitors, the relative weakness will put a drag on visitation to the region, both day and overnight.
- ★ Domestic visitation numbers fell in 2009, but will show steady growth going forward as the local economy rebounds.
- ★ International visitation to DC grew to nearly 10% of visitation in 2009, the third straight year of increased international share. The growth in visitors was stronger than expected, bucking the national trend where international visitation fell 5%. Growth to DC should remain steady through 2013.
- ★ The United Kingdom (despite a 7% drop in visitation in 2009) remains DC's largest international market. Growth opportunities over the next three years will come from South America and Canada.
- ★ The continues depreciation of the U.S. dollar is one of the driving forces behind the continued strong international arrivals forecast.

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METHODOLOGY

VISITOR VOLUME & PROFILES: DK SHIFFLET & ASSOCIATES

- Data is collected by D.K. Shifflet's DESTINATION PERFORMANCE/Monitor which contacts an average of 50,000 individual U.S. households monthly and more than 90,000 respondents annually via online and mail panels.
- Surveying random cross-section of panel members each quarter
- Data is weighted to U.S. population

VISITOR FORECAST AND ECONOMIC IMPACT

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