

WASHINGTON DC's 2010 VISITOR STATISTICS

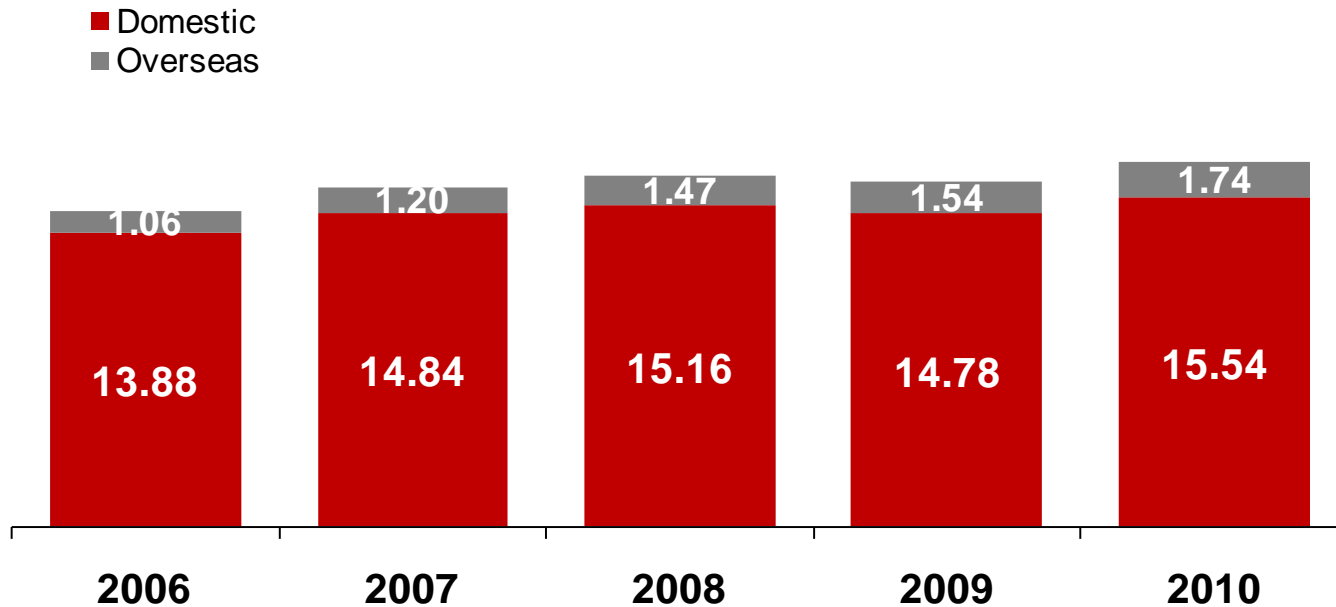
Washington
DCTM

destinationdc.com

TOTAL VISITATION TO DC

(CITY-DEFINITION, IN MILLIONS)

★ *5.9% increase in total visitation to DC in 2010*



■ Domestic
■ Overseas

2006

2007

2008

2009

2010

Source: D.K. Shifflet & Associates, Office of Travel & Tourism Industries, Department of Commerce



OVERSEAS VISITATION*

Destination (MSA)	2008	2009	2010	2010 Visitation
New York City	1	1	1	8.46 M
Los Angeles	4	3	2	3.35 M
Miami	2	2	3	3.11 M
Orlando	5	4	4	2.72 M
San Francisco	3	5	5	2.64 M
Las Vegas	6	6	6	2.43 M
Washington, DC	8	7	7	1.74 M
Honolulu/Oahu	7	8	8	1.63 M
Boston	10	9	9	1.19 M
Chicago	9	10	10	1.13 M

★ DC maintained its #7 position for overseas visitation to the U.S.

★ DC experienced volume growth of 13% in international visitation for 2010

★ Stronger growth in overseas arrivals to Washington, DC than to U.S. overall (+11%)

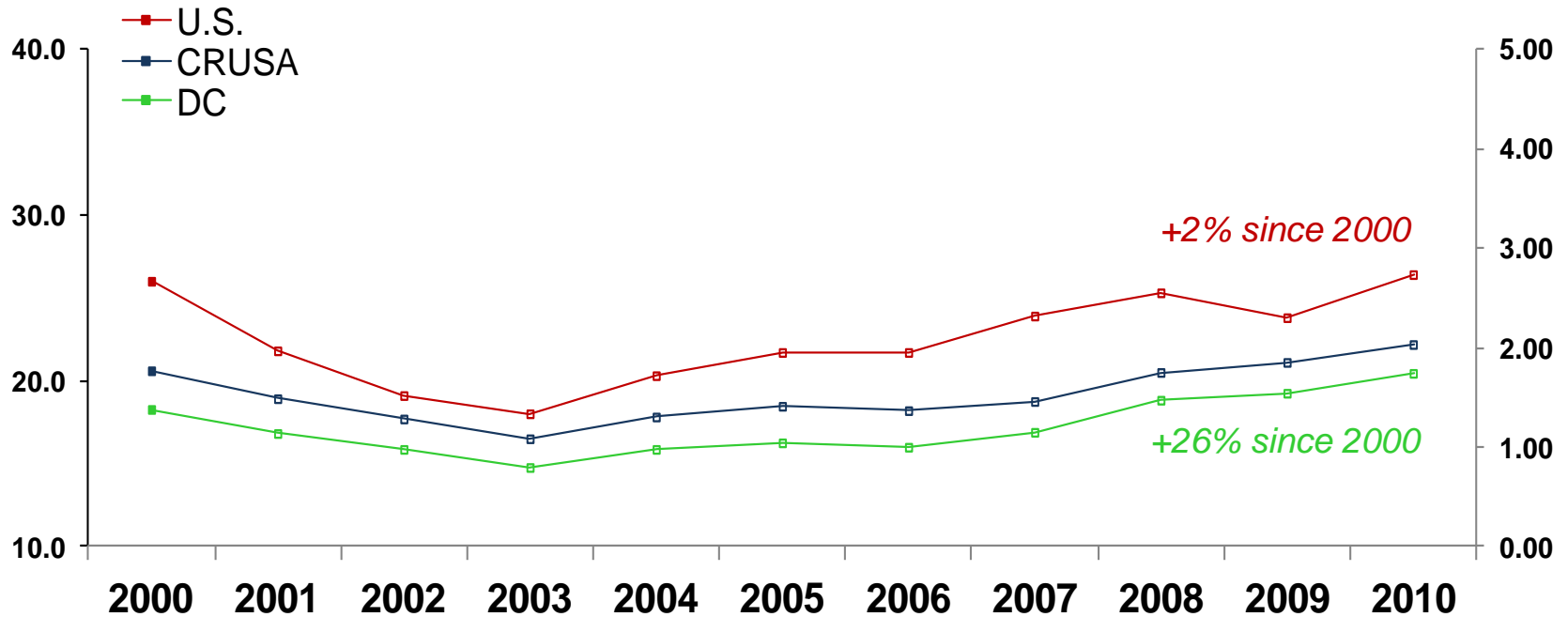
*Excludes Canada and Mexico

Source: Office of Travel & Tourism Industries, Department of Commerce



OVERSEAS VISITATION TO UNITED STATES, CRUSA & DC

(IN MILLIONS)

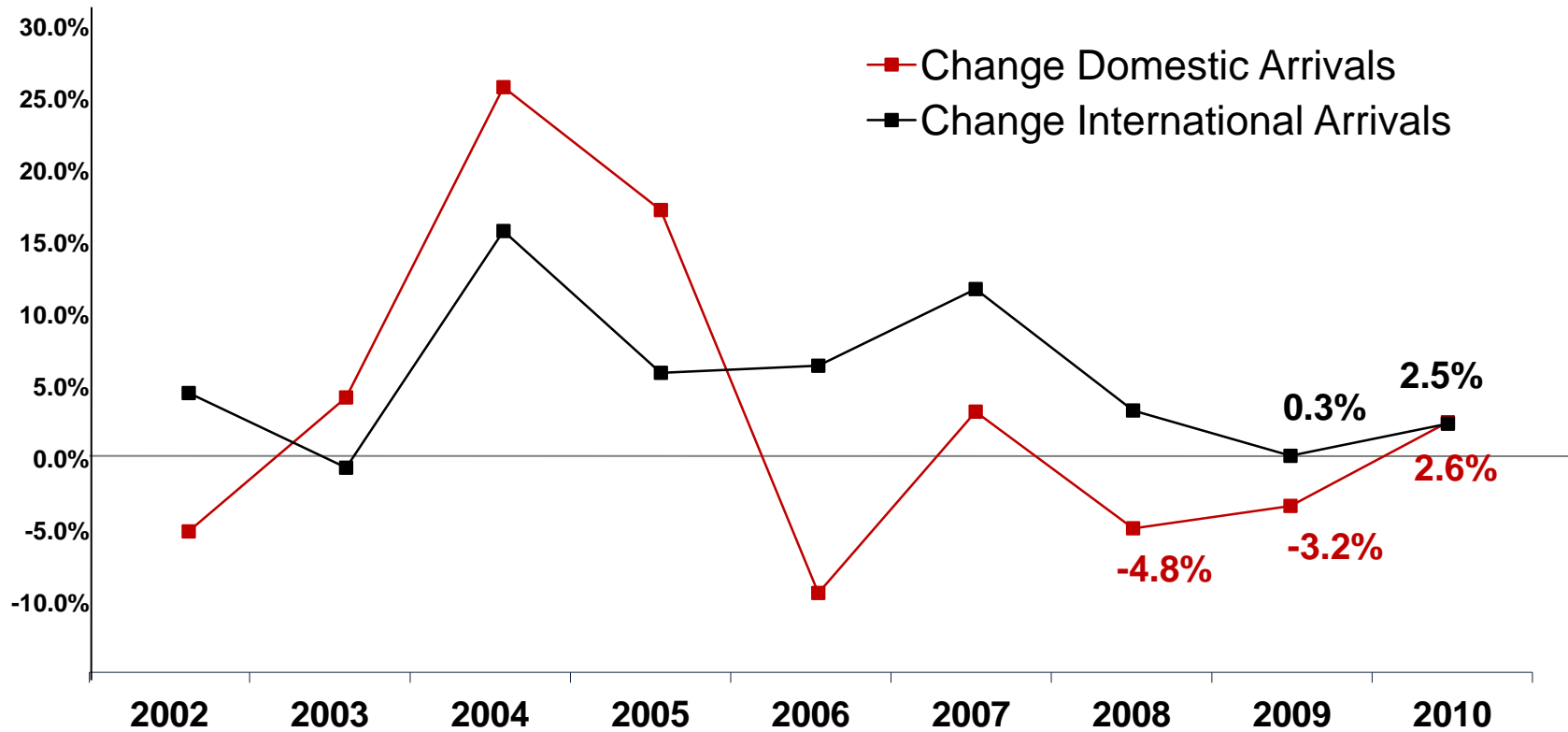


For U.S., use left axis. For CRUSA and DC, use right axis.
Source: Office of Travel & Tourism Industries, Department of Commerce



CHANGE IN AIRPORT ARRIVALS

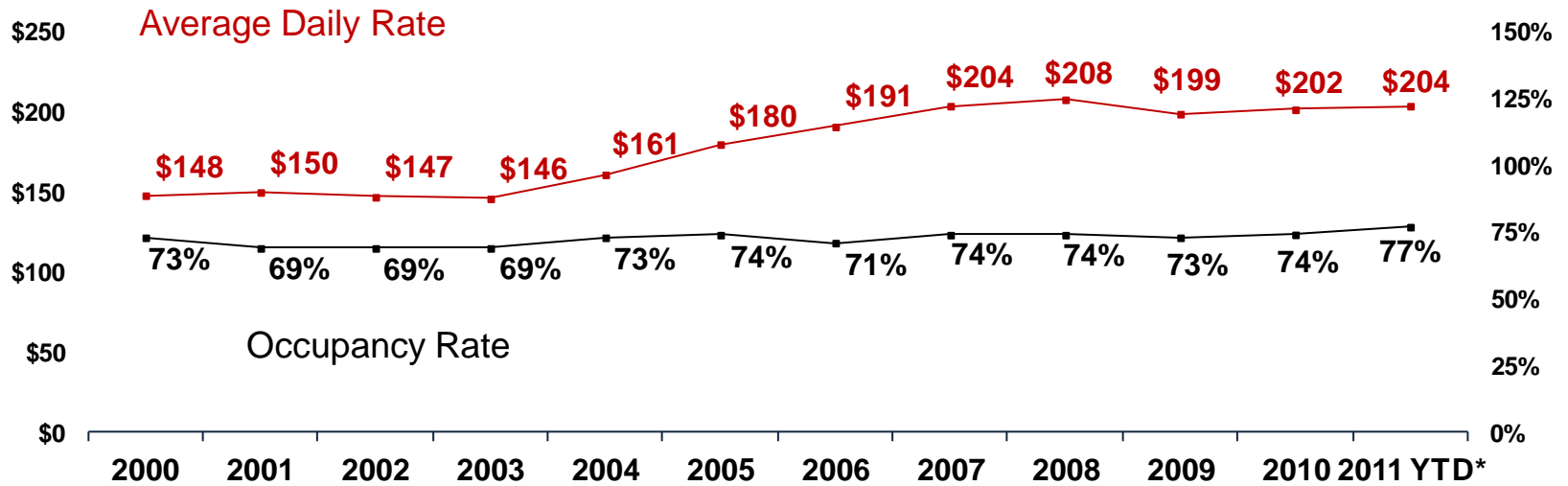
(DULLES AND REAGAN)



Source: Metropolitan Washington Airport Authority



HOTEL STATISTICS



*2011 YTD through August
 Source: Smith Travel Research



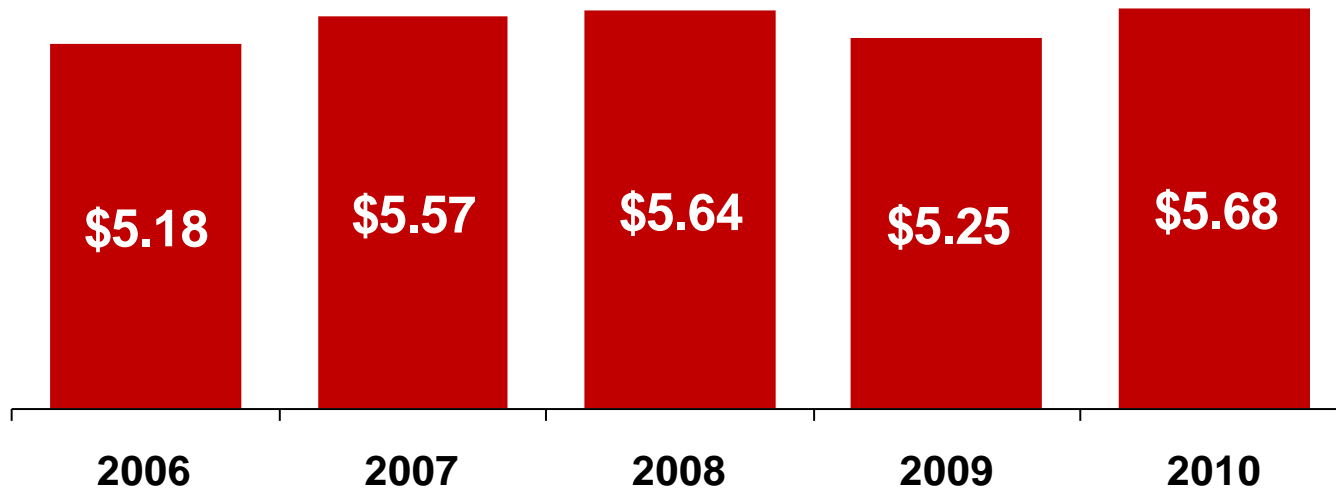
ADDITIONAL TOURISM INDICATORS	2010	Percent Change 2009-10
National Park Service – Mall locations	22.8 million	1.7% ↑
National Park Service – all DC area locations	42.7 million	2.2% ↑
Smithsonian – Mall locations	24.9 million	1.1% ↑
Smithsonian – all DC locations	30.0 million	1.4% ↑
Total domestic arrivals (DCA+IAD)	17.5 million	2.6% ↑
Total international arrivals (DCA+IAD)	3.4 million	2.5% ↑
WMATA Metro rail ridership	213.6 million	3.1% ↓
Circulator ridership	4.6 million	16.8% ↑

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



VISITOR SPENDING

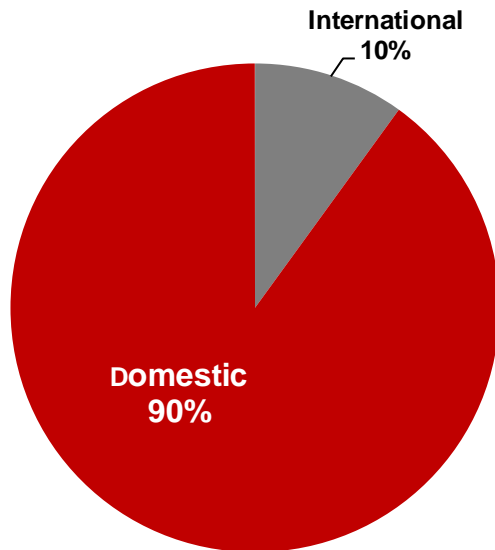
(IN BILLIONS)



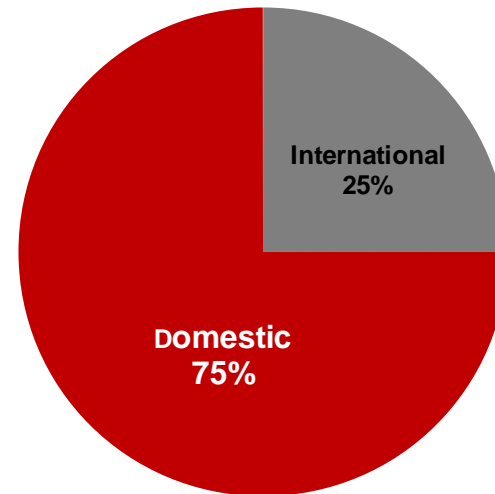
Includes both domestic and international spending
Source: IHS Global Insight

DOMESTIC vs. INTERNATIONAL

PERCENT OF ARRIVALS



PERCENT OF SPEND



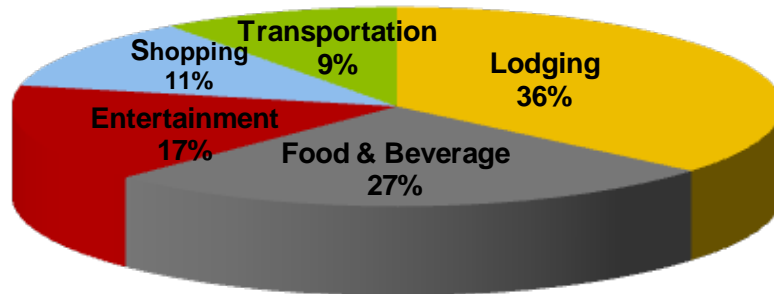
Source: Office of Travel & Tourism Industries, Department of Commerce, IHS Global Insight

FACTS ABOUT TOURISM SPENDING

- ★ If tourism did not exist in Washington, DC, the District would need to generate an average of **\$2,334 in local taxes** from each of the 266,707 households in DC, in order to maintain the current level of tax receipts
- ★ Travel/tourism spending support **71,301 jobs** annually (+6.9% from 2009)
- ★ Travel/tourism jobs support **\$2.8 billion in wages** (+8.7% from 2009)
- ★ Domestic spending up 6.4% to **\$4.27 billion**, but international spending up 13.8% to **\$1.41 billion** in 2010

DISTRIBUTION OF VISITOR SPENDING

Expenditure Category	2010	% Change
Lodging	2.03 billion	3.4% ↑
Food & Beverage	1.54 billion	9.9% ↑
Entertainment	951 million	18.0% ↑
Shopping	642 million	11.9% ↑
Transportation	523 million	1.9% ↑



Source: IHS Global Insight

TAX REVENUE

Local Tax Revenue (\$)	
Corporate Income	33,133,275
Personal Income	28,361,290
Social Security & Other Taxes	554,462
Hotel Tax	207,122,157
Property Taxes	165,138,986
Excise & Fees	19,285,425
Sales Tax	169,024,036
Restaurant	107,529,466
Retail	51,434,396
Airport	7,136,515
Car Rental	2,923,659
Local Total	622,619,631

Federal Tax Revenue (\$)	
Corporate Income	37,581,257
Personal Income	40,340,656
Excise & Fees	51,818,270
Social Security & Other Taxes	201,406,591
Federal Total	331,146,774

**Local + Federal Total =
\$953.8 million
+6.2% change from 2009**

WHAT DOES A VISITOR MEAN TO DC?

- ★ Each DC visitor generates about **\$329 in expenditures**
- ★ Every **242 visitors creates a new job** in DC
- ★ Each visitor creates about **\$55 in tax receipts**, \$36 of which goes to local government
- ★ Each visitor generates **\$163 in wages**
- ★ Each visitor adds about **\$228 to Gross City Product**

Source: IHS Global Insight, D.K. Shifflet & Associates, Office of Travel & Tourism Industries, Department of Commerce



2010 DC DOMESTIC VISITOR PROFILE

- ★ 55% leisure travelers, 45% business travelers
- ★ 55% traveled by car, 31% traveled by air
- ★ Average distance traveled: 584 miles one-way
- ★ Average travel party size: 1.7 persons
- ★ Average length of stay: 3.0 nights
- ★ 71% of domestic visitors have no children in their household

TOP BOOKINGS FY '10

(BY TOTAL ROOM NIGHTS)

Account Name	Meeting Name	Meeting Date	Total Attend.	Peak Rooms	Room Nights
American College of Cardiology	Annual Scientific Session & i2 Summit	3/30/2014	25,000	14000	68,180
International AIDS Society	World Aids	7/22/2012	30,000	9,000	55,000
American Association for Cancer Research	Annual Meeting	April 2017 & 2021	12,000	7,500	35,325
American Society of Nephrology	Annual Meeting	11/8/2019	13,000	6,600	28,955
Drug Information Association	Annual June National Convention	June 2020 & 2025	8,500	5,000	23,550
National Association for the Specialty Food Trade, Inc.	International Food & Confection Show (Summer)	6/17/2012	25,000	5,200	21,628
National Association of Realtors	Mid-Year Legislative Meeting and Trade Expo	May 2016 & 2017	10,000	4,177	20,285
U.S. Green Building Council	Annual Conference/Expo	11/16/2015	8,000	5,150	19,380
Transportation Research Board	Annual Meeting	Jan. 2011-2014	10,500	4,400	18,617
American Association for the Study of Liver Diseases	AASLD Annual Meeting	11/5/2022	8,000	4,000	17,560

Source: Destination DC



LARGEST 10 CONVENTIONS IN FY '11

(BY TOTAL ROOM NIGHTS)

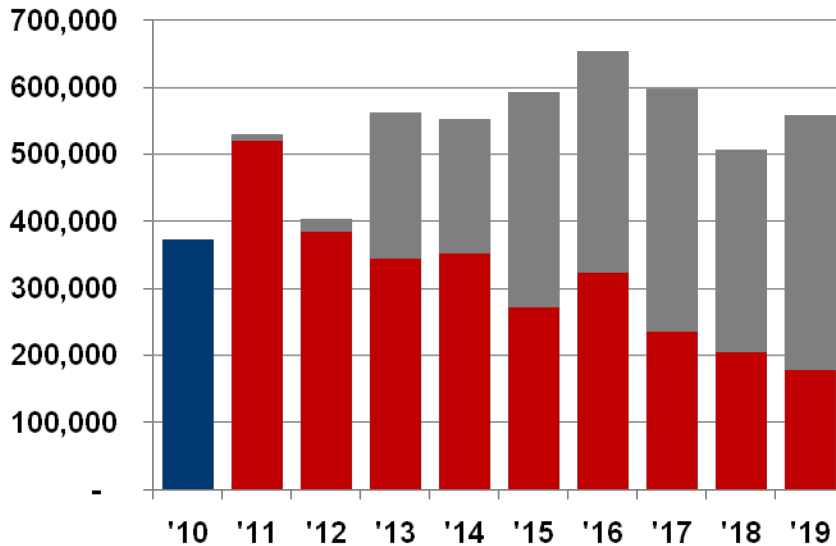
Account Name	Meeting Name	Meeting Date	Total Attend.	Peak Rooms	Room Nights
American Urological Association	Annual Meeting	May 2011	15,000	9,500	53,485
Biotechnology Industry Org.	Annual Meeting & EXPO	June 2011	16,000	11,850	48,226
American College of Surgeons	Annual Clinical Congress	Oct. 2010	15,000	8,500	42,500
American Water Works Ass'n	Annual Convention	June 2011	14,000	6,000	29,570
Federation of American Societies for Experimental Biology	Experimental Biology Meeting	June 2011	14,000	6,000	29,570
National Association for the Specialty Food Trade, Inc.	International Fancy Food & Confection Show (Summer)	July 2011	25,000	5,500	22,495
American College of Obstetricians and Gynecologists	Annual Meeting	Apr./May 2011	14,000	4,800	20,688
Omega Psi Phi Fraternity	Centennial Conference	July 2011	7,000	5,000	20,520
National Association of Realtors	Mid-Year Legislative Meeting and Trade Expo	May 2011	10,000	4,177	20,332
American Psychological Ass'n	Annual Meeting	Aug. 2011	14,000	4,000	17,200

Source: Destination DC



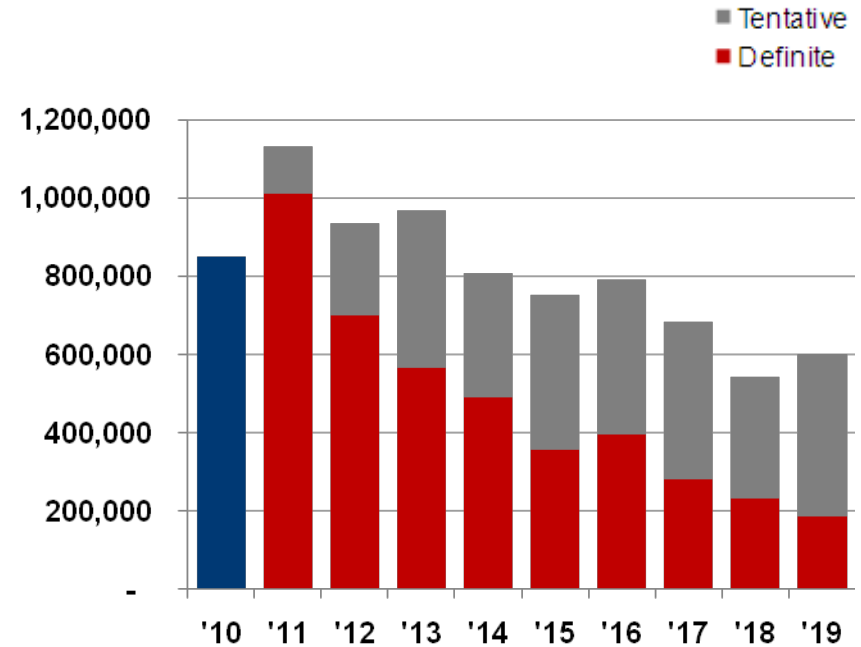
CONVENTION FORECAST

CONVENTION CENTER EVENTS



373,000 room nights in 2010

ALL LOCATIONS EVENTS



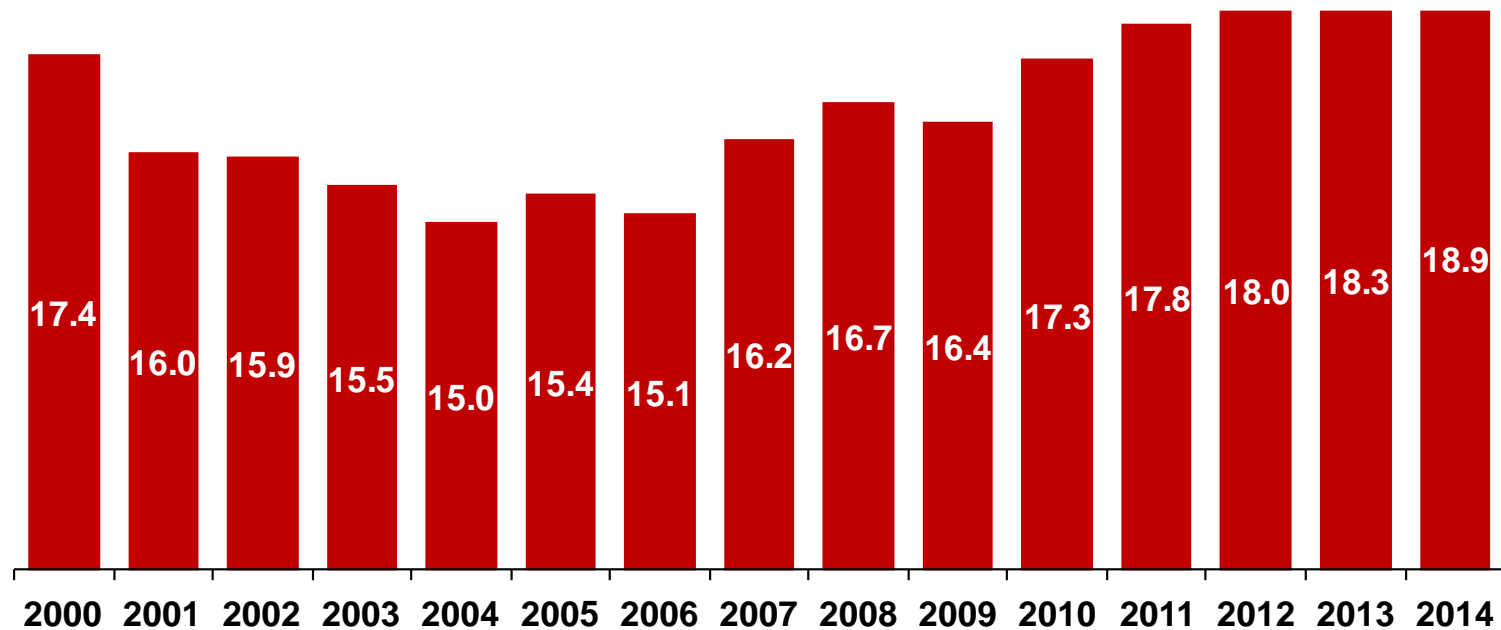
850,000 room nights in 2010

Charts reflect calendar year as of August 8, 2011
Source: Destination DC



VISITATION FORECAST

★ DC's total visitor volume in 2010 has nearly recovered to all-time high in 2000 and is expected to increase in 2011 by 2.5%



METHODOLOGY

VISITOR VOLUME & PROFILES: D.K. SHIFFLET & ASSOCIATES

- Data is gathered through a mail and online panel with more than 75,000 respondents per year
- For the 2010 travel year, DK Shifflet & Associates collected data on more than 180,000 trips and more than 1,724 trips to DC specifically
- Data is weighted on key demographics to balance the sample to the U.S. population

VISITOR FORECAST AND ECONOMIC IMPACT

- Global Insight combines D.K. Shifflet & Associates data with economic variables, DC tax collections and other tourism indicators like airport arrivals, transportation and attractions attendance