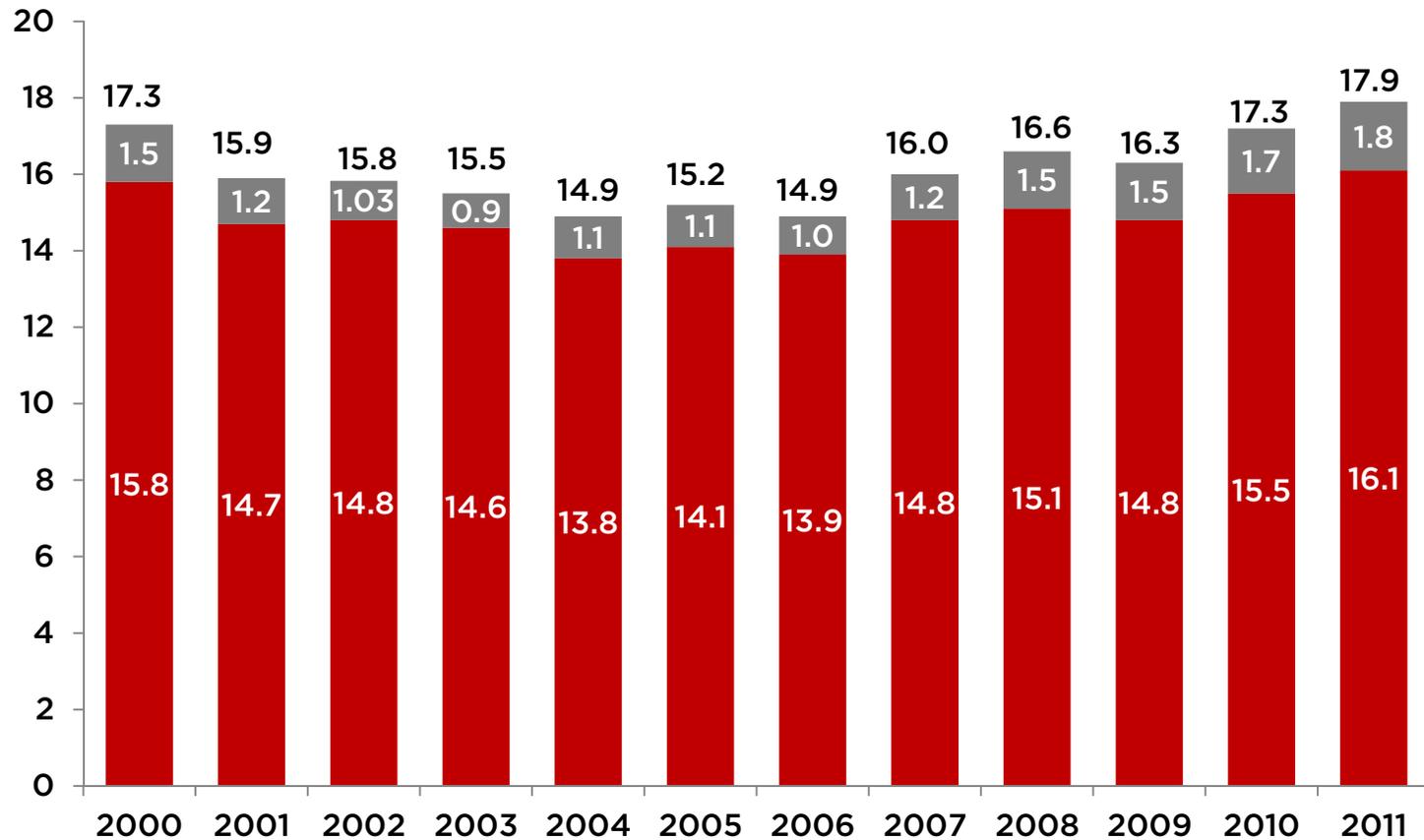


WASHINGTON DC's 2011 VISITOR STATISTICS

Washington
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destinationdc.com

TOTAL VISITATION TO DC (IN MILLIONS)



In 2011, DC welcomed a total of 17.9 million visitors, surpassing the previous record set in 2000.

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



OVERSEAS VISITATION*

Destination (MSA)	2009	2010	2011	2011 Visitation
New York City	1	1	1	9.285 M
Los Angeles	3	2	2	3.653 M
Miami	2	3	3	2.956 M
Orlando	4	4	5	2.788 M
San Francisco	5	5	4	2.872 M
Las Vegas	6	6	5	2.788 M
Washington, DC	7	7	7	1.812 M
Honolulu/Oahu	8	8	8	1.785 M
Boston	9	9	9	1.311 M
Chicago	10	10	10	1.199 M

- DC maintained its #7 position for overseas visitation to the U.S. for the third consecutive year
- DC's overseas visitor volume increased 4% in for 2011
- For 2011, slightly weaker overseas visitor volume growth in DC (4.0%) compared to the U.S. overall (5.7%)

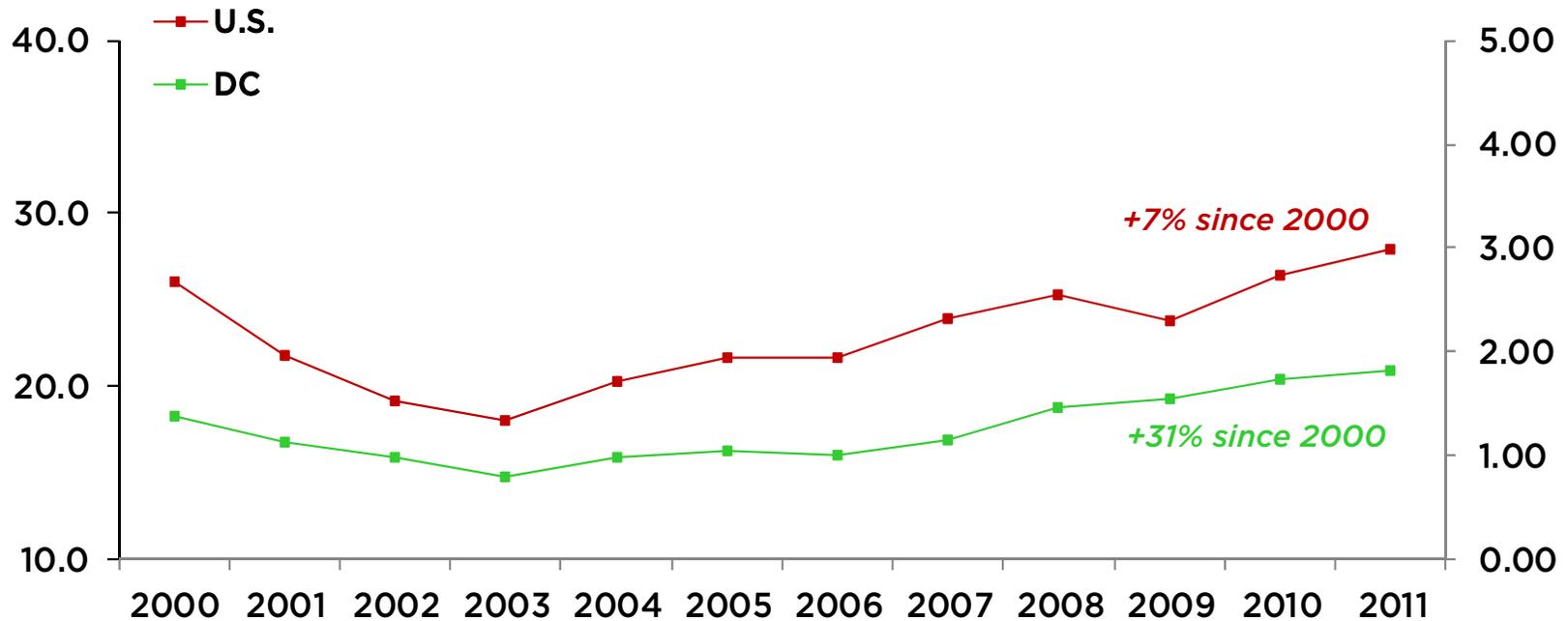
*Excludes Canada and Mexico

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

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OVERSEAS VISITATION TO UNITED STATES & DC (IN MILLIONS)

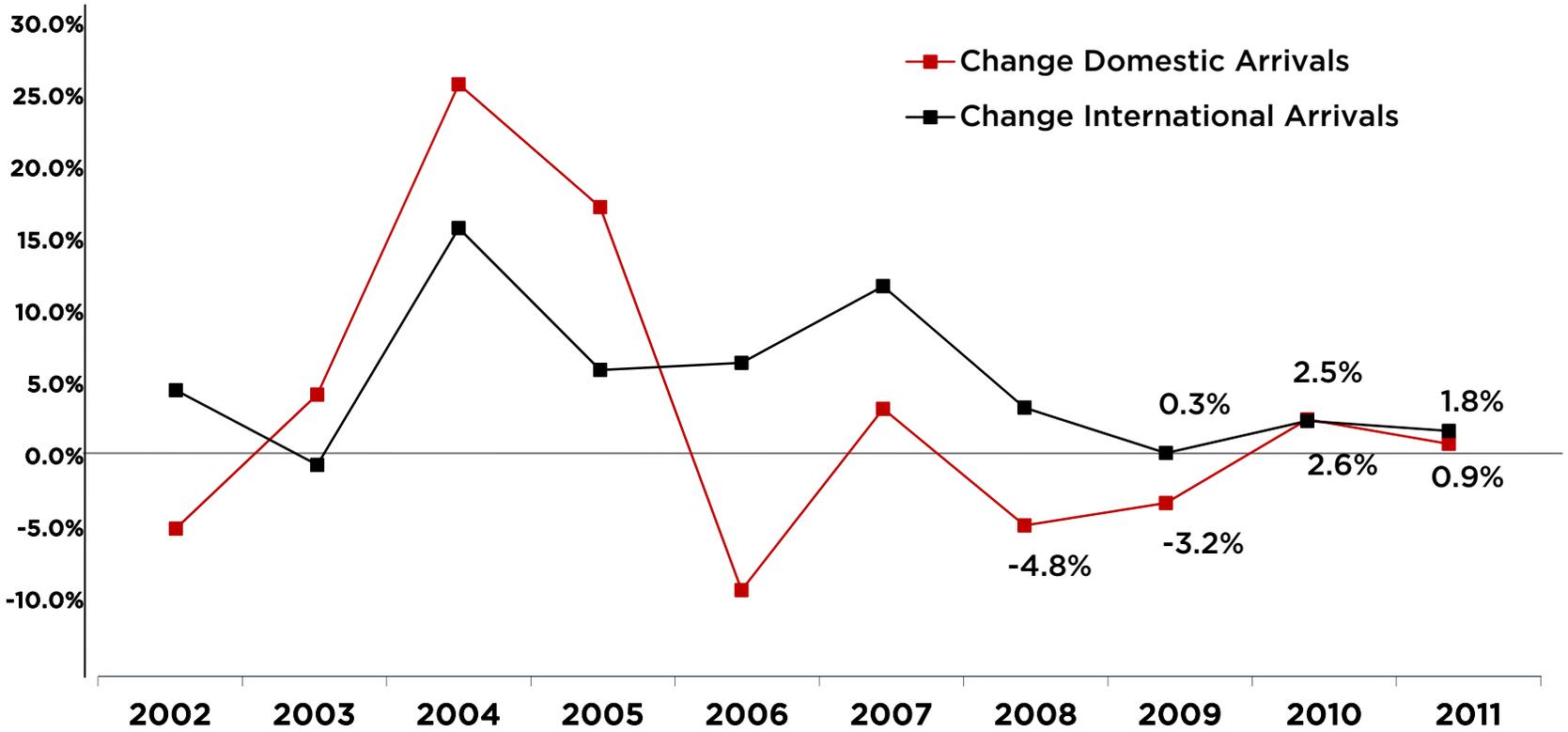


For U.S., use left axis. For DC, use right axis.
Source: Office of Travel & Tourism Industries, Department of Commerce



CHANGE IN AIRPORT ARRIVALS

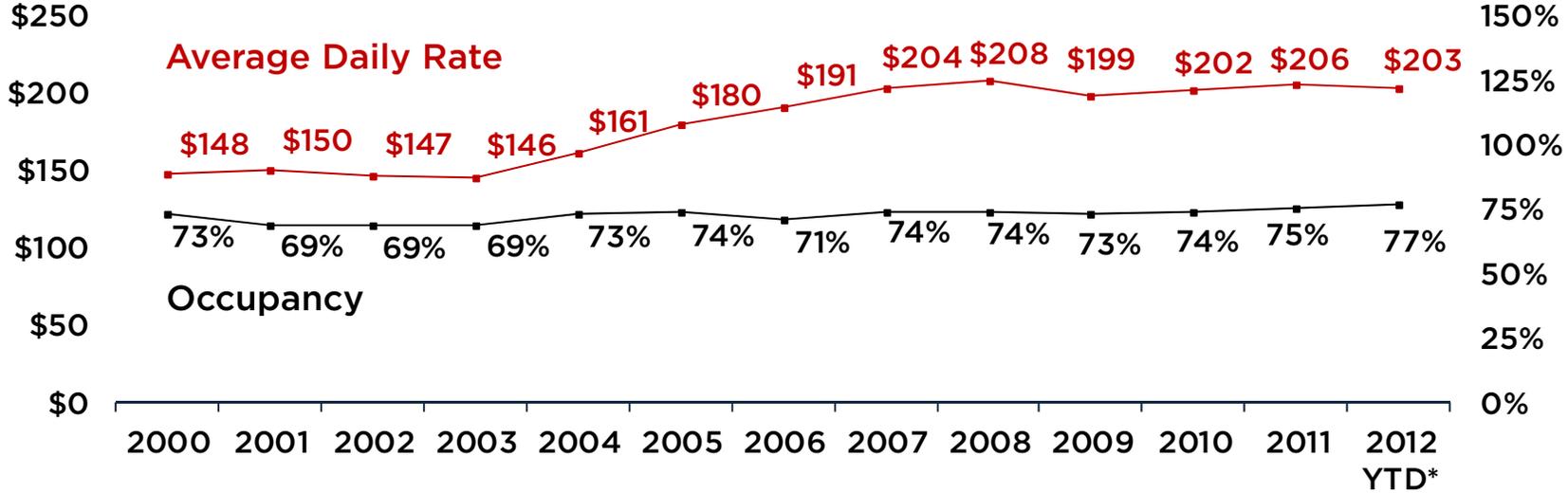
(DULLES AND REAGAN)



Source: Metropolitan Washington Airport Authority



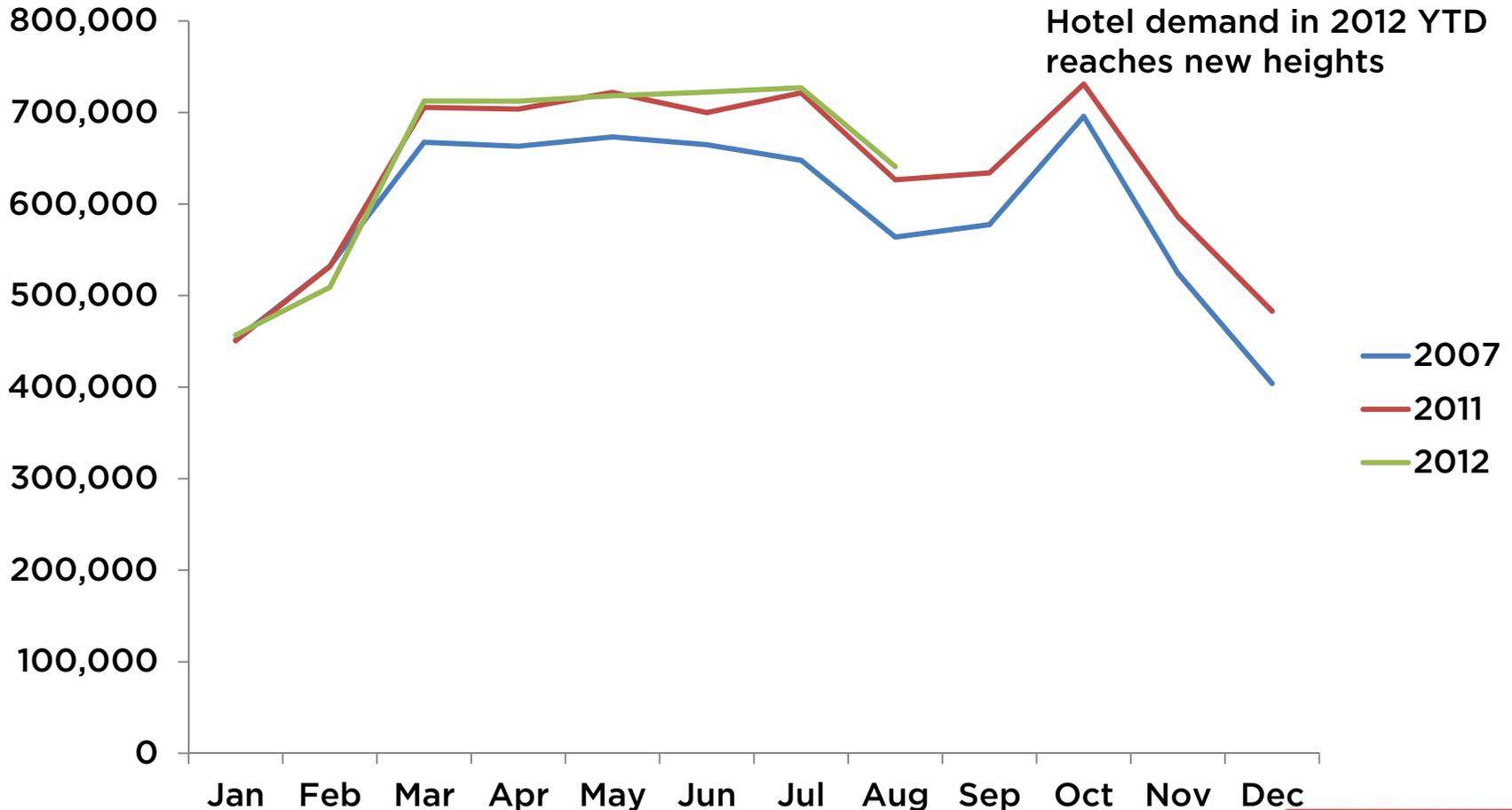
DC HOTEL PERFORMANCE



For ADR, use left axis. For occupancy, use right axis.
 2012 YTD is through July 2012
 Source: Smith Travel Research



2007, 2011 and 2012 YTD DC Hotel Demand



2012 YTD is through August 2012
Source: Smith Travel Research



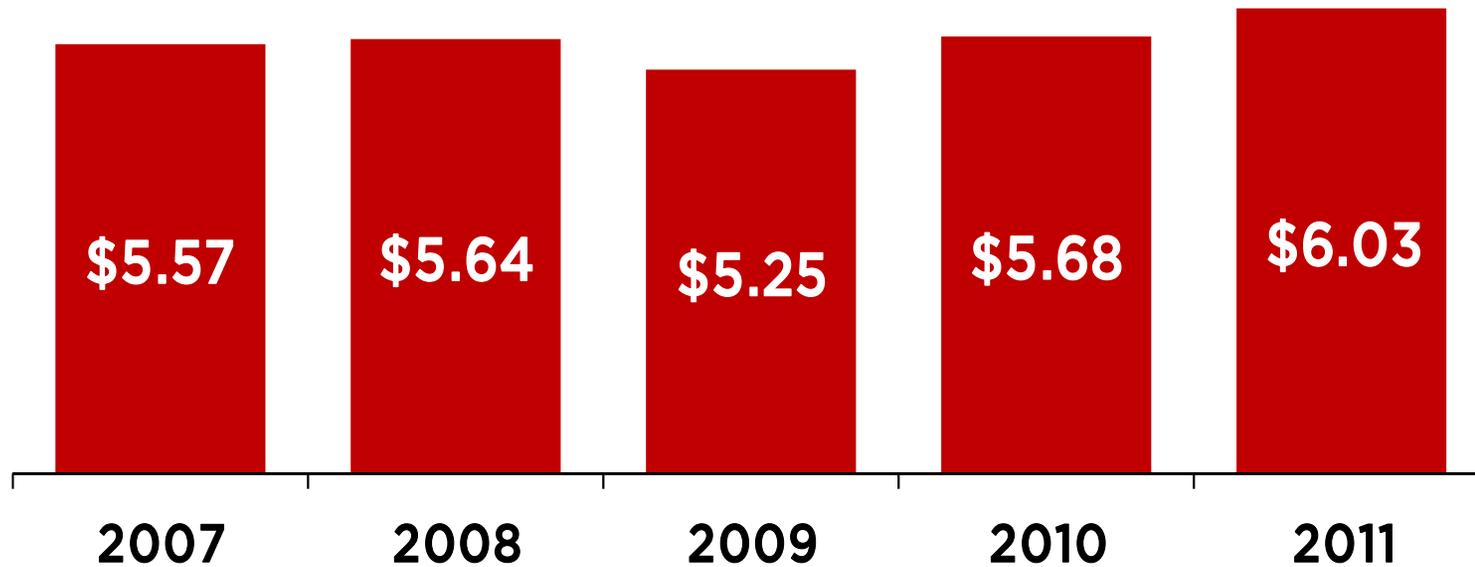
ADDITIONAL TOURISM INDICATORS	2011	Percent Change 2010-11
National Park Service – Mall locations	20.8 million	-8.8% ↓
National Park Service – all DC area locations	40.0 million	-6.2% ↓
Smithsonian – Mall locations	23.5 million	-6.5% ↓
Smithsonian – all DC locations	28.0 million	-10.1% ↓
Total domestic arrivals (DCA+IAD)	17.7 million	0.9% ↑
Total international arrivals (DCA+IAD)	3.4 million	1.8% ↑
WMATA Metro rail ridership	217.0 million	0.2% ↑
Circulator ridership	5.8 million	14.0% ↑

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



VISITOR SPENDING

(IN BILLIONS)



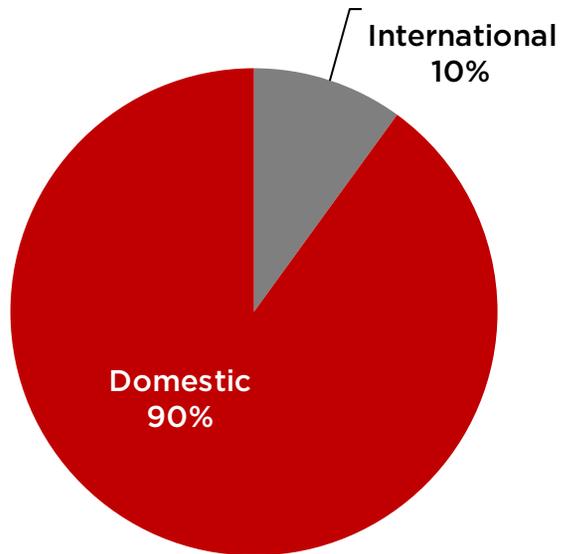
Includes both domestic and international spending
Source: IHS Global Insight

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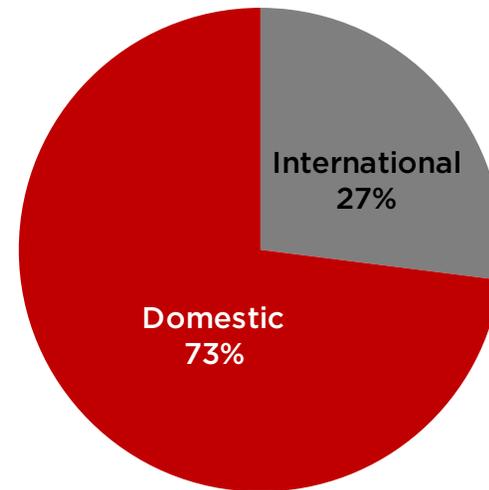
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DOMESTIC vs. INTERNATIONAL

PERCENT OF ARRIVALS



PERCENT OF SPEND



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

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FACTS ABOUT TOURISM SPENDING

- If tourism did not exist in Washington, DC, the District would need to generate an average of **\$2,483 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 **76,256 jobs** annually (+7.0% from 2010)
- Travel/tourism jobs support **\$3.06 billion in wages** (+8.6% from 2010)
- Domestic spending up 3.8% to **\$4.43 billion**; international spending up 13.4% to **\$1.60 billion** in 2011

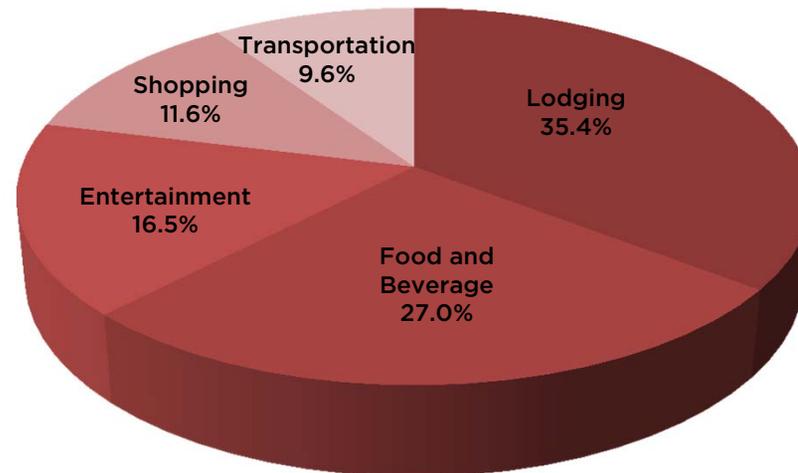
Source: IHS Global Insight, D.K. Shifflet & Associates, Office Travel & Tourism Industries, Dept of Commerce

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DISTRIBUTION OF VISITOR SPENDING

Expenditure Category	2011	% Change
Lodging	2.13 billion	5.2% ↑
Food & Beverage	1.63 billion	6.1% ↑
Entertainment	994 million	4.4% ↑
Shopping	698 million	8.7% ↑
Air Transportation	103 million	1.0% ↑
Other Transportation	473 million	12.5% ↑



Source: IHS Global Insight



TAX REVENUE

Local Tax Revenue (\$)	
Corporate Income	35,867,178
Personal Income	30,927,470
Social Security & Other Taxes	600,584
Hotel Tax	216,393,437
Property Taxes	178,414,878
Excise & Fees	21,005,998
Sales Tax	179,218,376
Restaurant	114,089,054
Retail	54,971,478
Airport	7,154,982
Car Rental	3,002,863
Local Total	662,427,920

Federal Tax Revenue (\$)	
Corporate Income	40,682,171
Personal Income	43,990,749
Excise & Fees	55,984,055
Social Security & Other Taxes	218,450,280
Federal Total	359,107,255

**Local + Federal Total =
\$1.02 billion**

+7.1% change from 2010

Source: IHS Global Insight



WHAT DOES A VISITOR MEAN TO DC?

- Each DC visitor generates about **\$336 in expenditures**
- Every **235 visitors creates a new job** in DC
- Each visitor creates about **\$57 in tax receipts**, \$37 of which goes to local government
- Each visitor generates **\$170 in wages**
- Each visitor adds about **\$258 to Gross City Product**

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



CONVENTION FORECAST

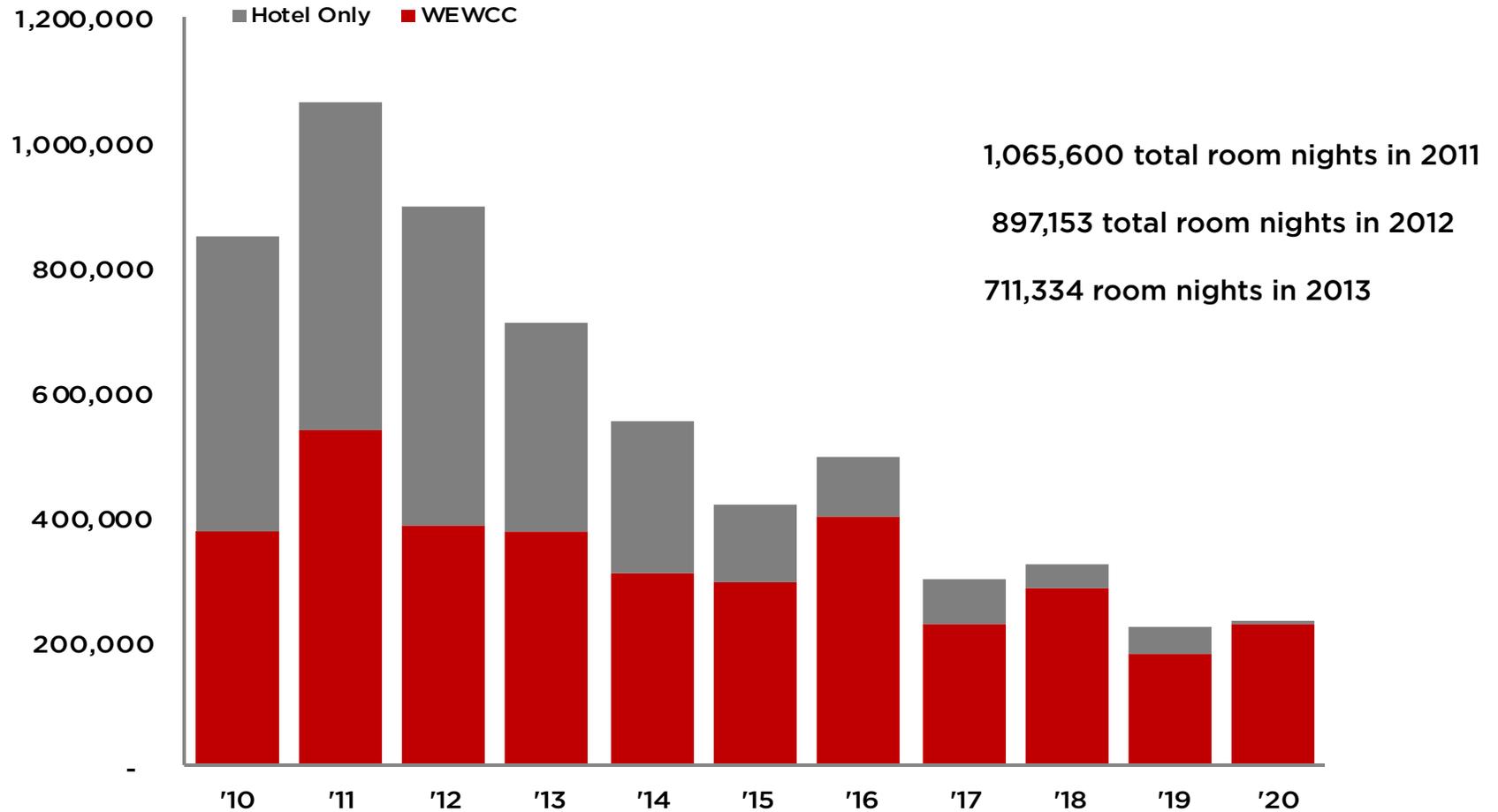


Chart reflects room nights confirmed as definite as of July 31, 2012
Source: Destination DC



Washington DC City Wide Bookings 2010 - 2020

(in thousands of room nights)

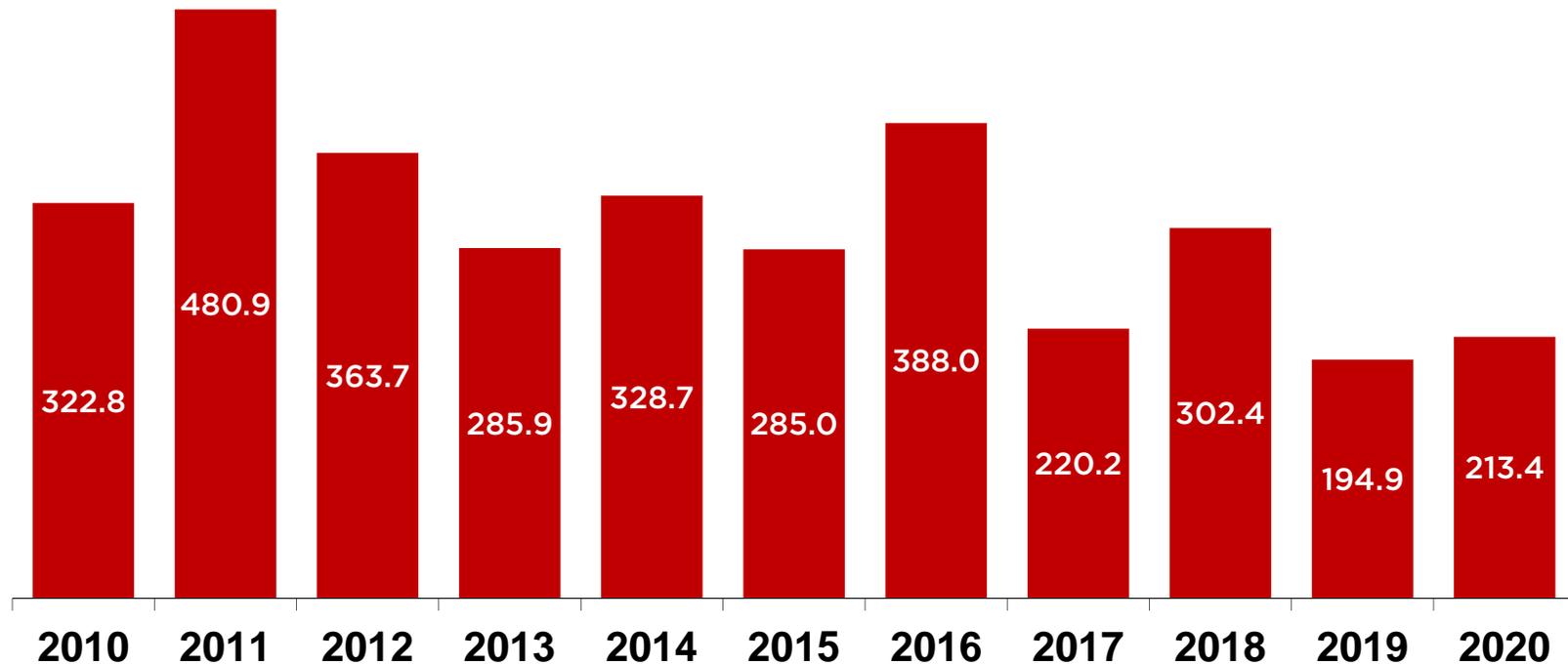
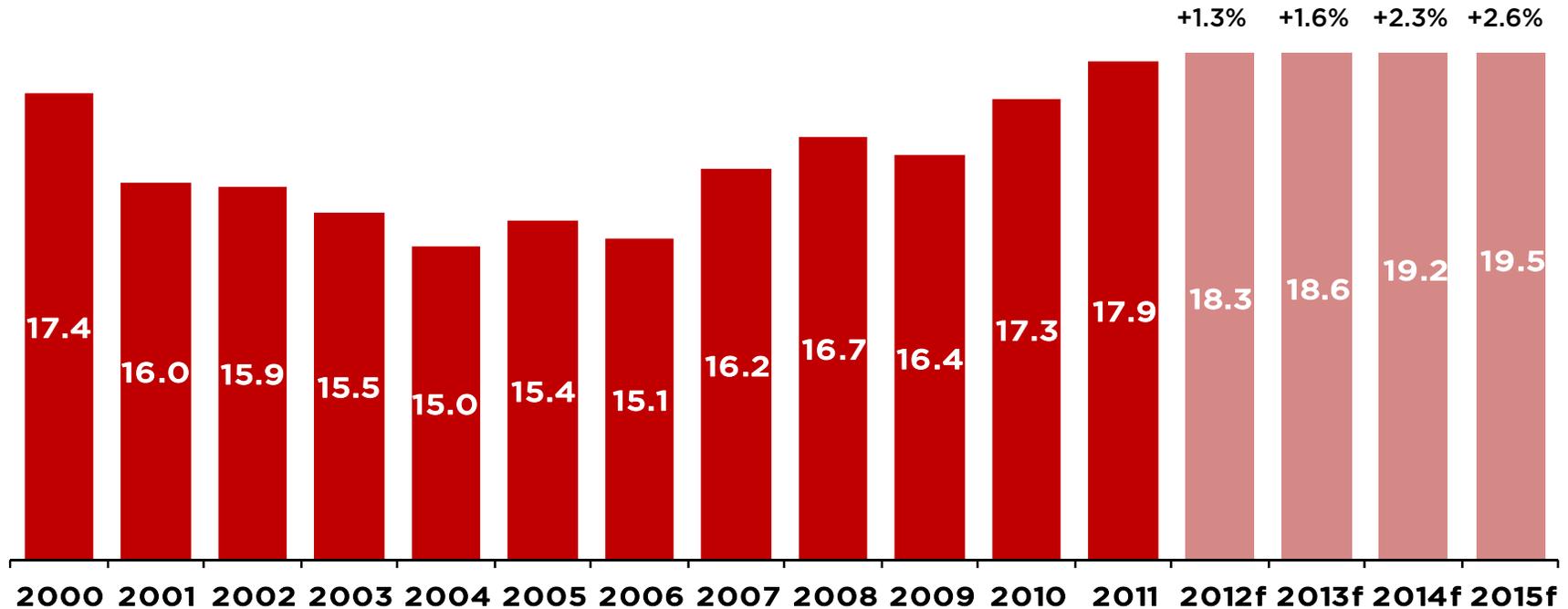


Chart reflects room nights confirmed as definite as of July 31, 2012
Source: Destination DC



VISITATION FORECAST

DC's total visitor volume in 2011 reached a record high and is expected to continue to increase through 2015.



destination



METHODOLOGY

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

- Data are collected using an online panel methodology, contacting more 50,000 distinct U.S. households
- For the 2011 travel year, DK Shifflet & Associates collected data on more than 180,000 trips and more than 2,500 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

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