

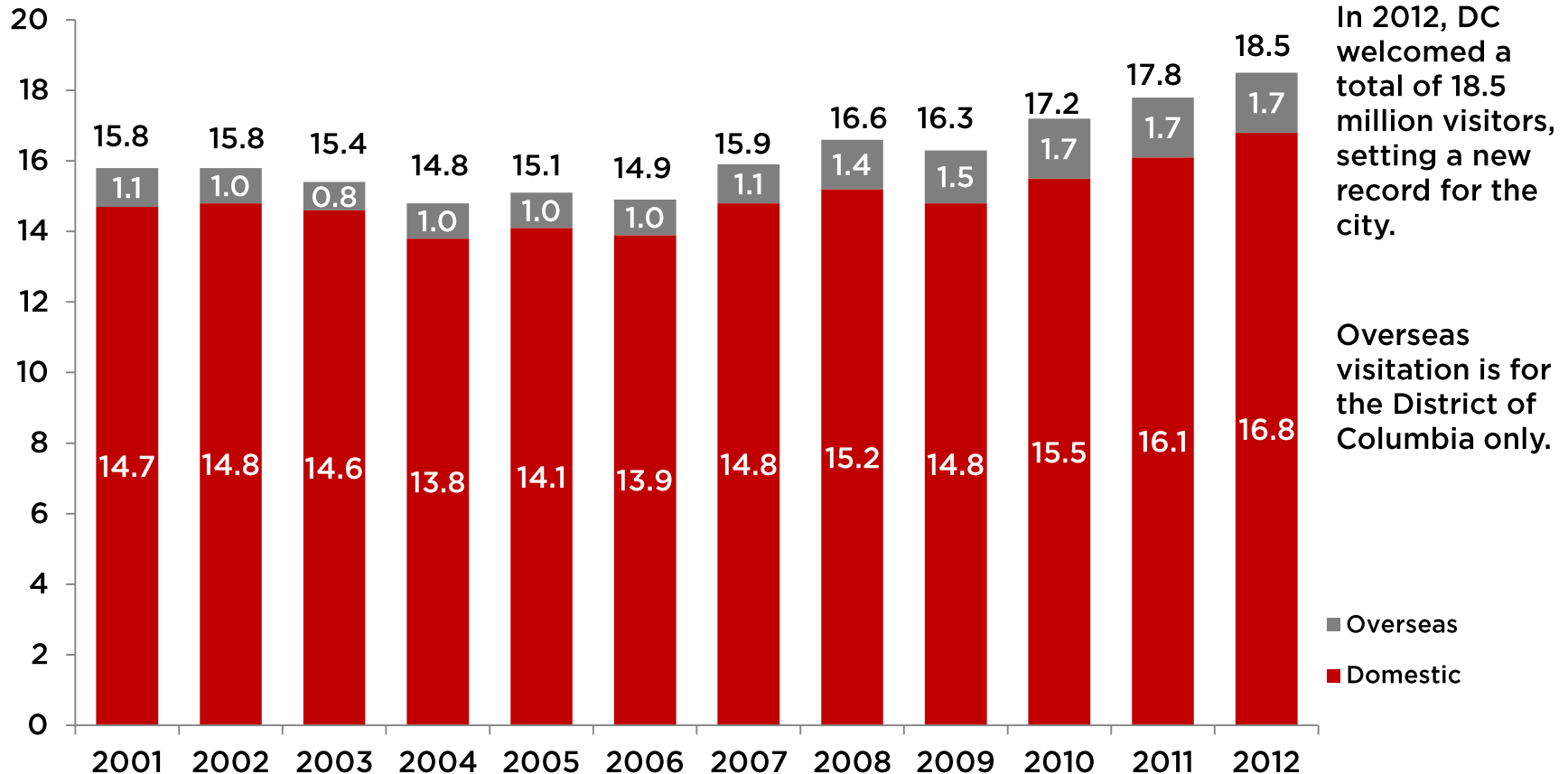
WASHINGTON DC's 2012 VISITOR STATISTICS



destinationdc.com

TOTAL VISITATION TO DC

(IN MILLIONS)



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

OVERSEAS VISITATION*

Destination (MSA)	2010	2011	2012	2012 Visitation
New York City	1	1	1	9.107 M
Miami	3	3	2	3.482 M
Los Angeles-Long Beach	2	2	3	3.393 M
Orlando	4	5	4	3.184 M
San Francisco	5	4	5	2.798 M
Las Vegas	6	5	6	2.708 M
Honolulu	8	8	7	2.232 M
Washington, DC	7	7	8	1.756 M
Chicago	10	10	9	1.369 M
Boston	9	9	10	1.250 M

- DC dropped to #8 position for overseas visitation as Honolulu saw a surge in visitation.
- DC's overseas visitor volume decreased 3% in for 2012

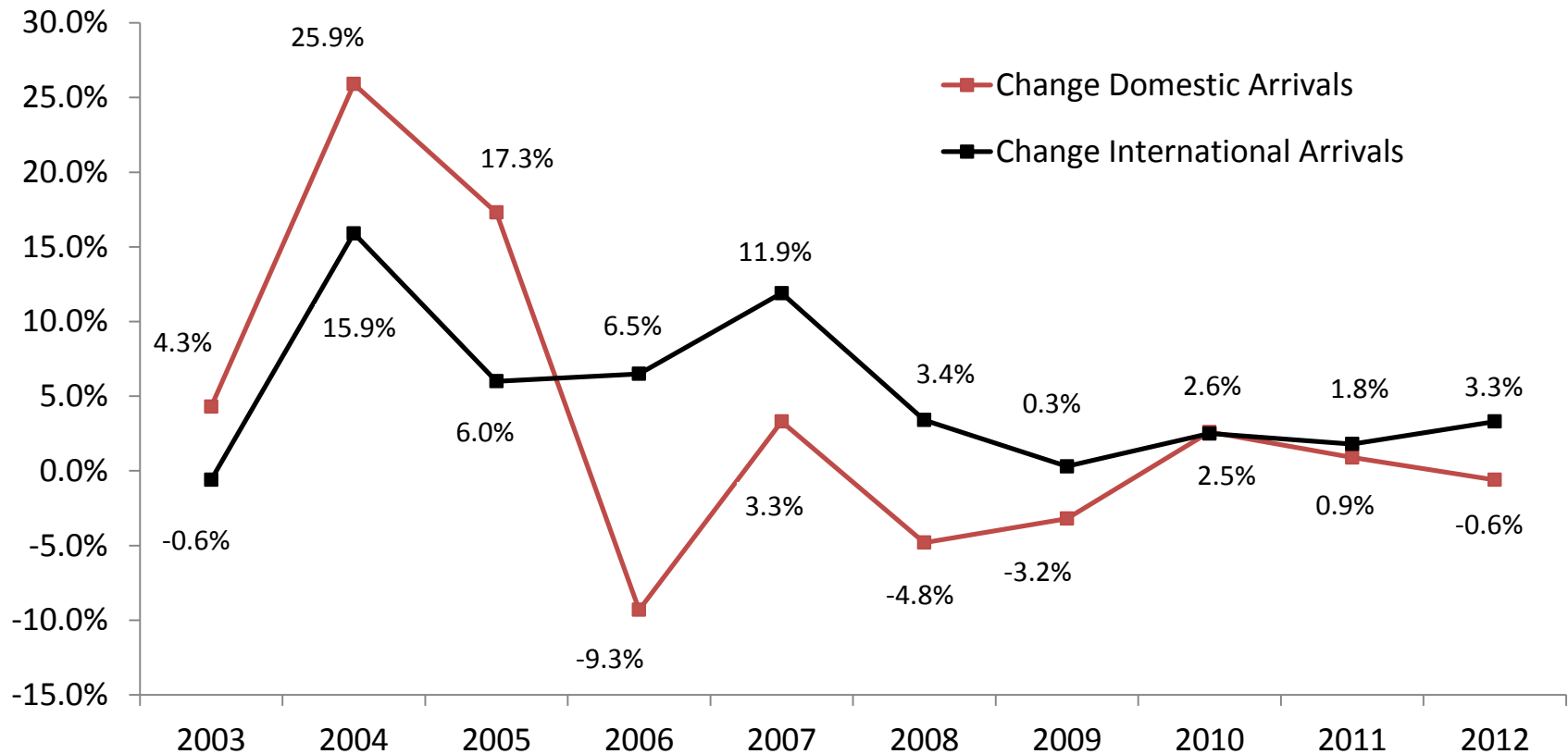
*Excludes Canada and Mexico; city statistics are for the MSA

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



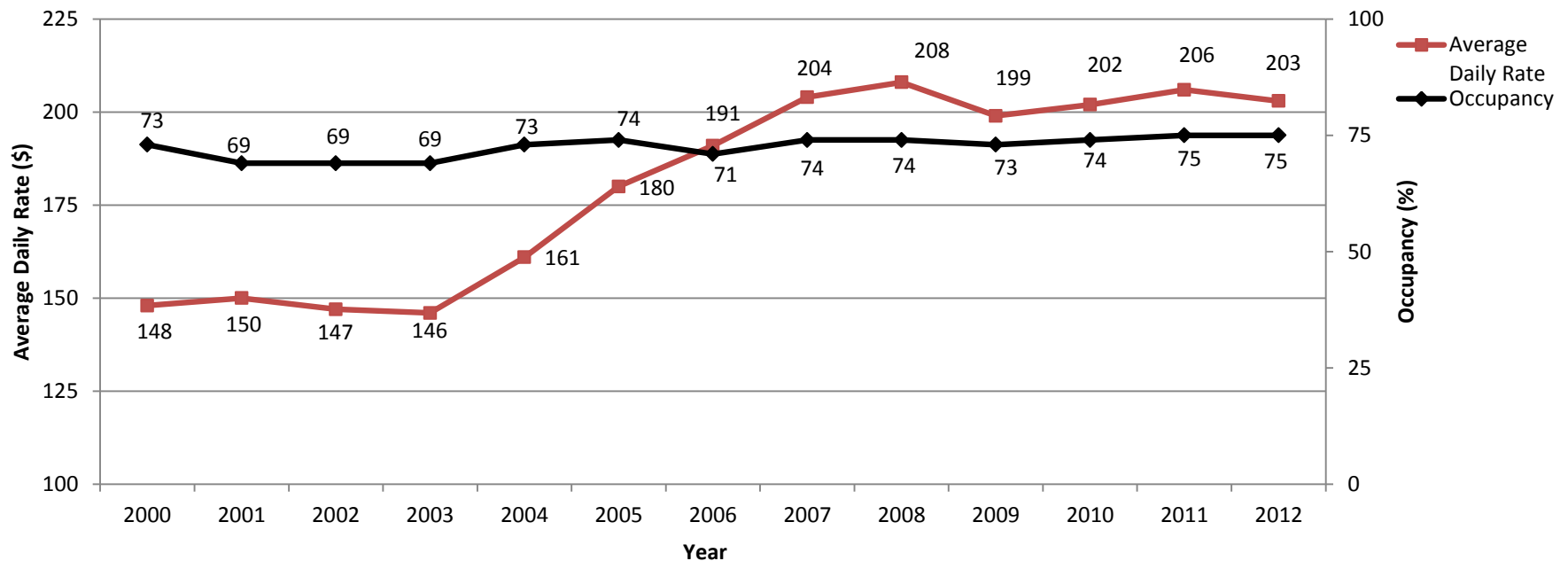
CHANGE IN AIRPORT ARRIVALS

(DULLES AND REAGAN)



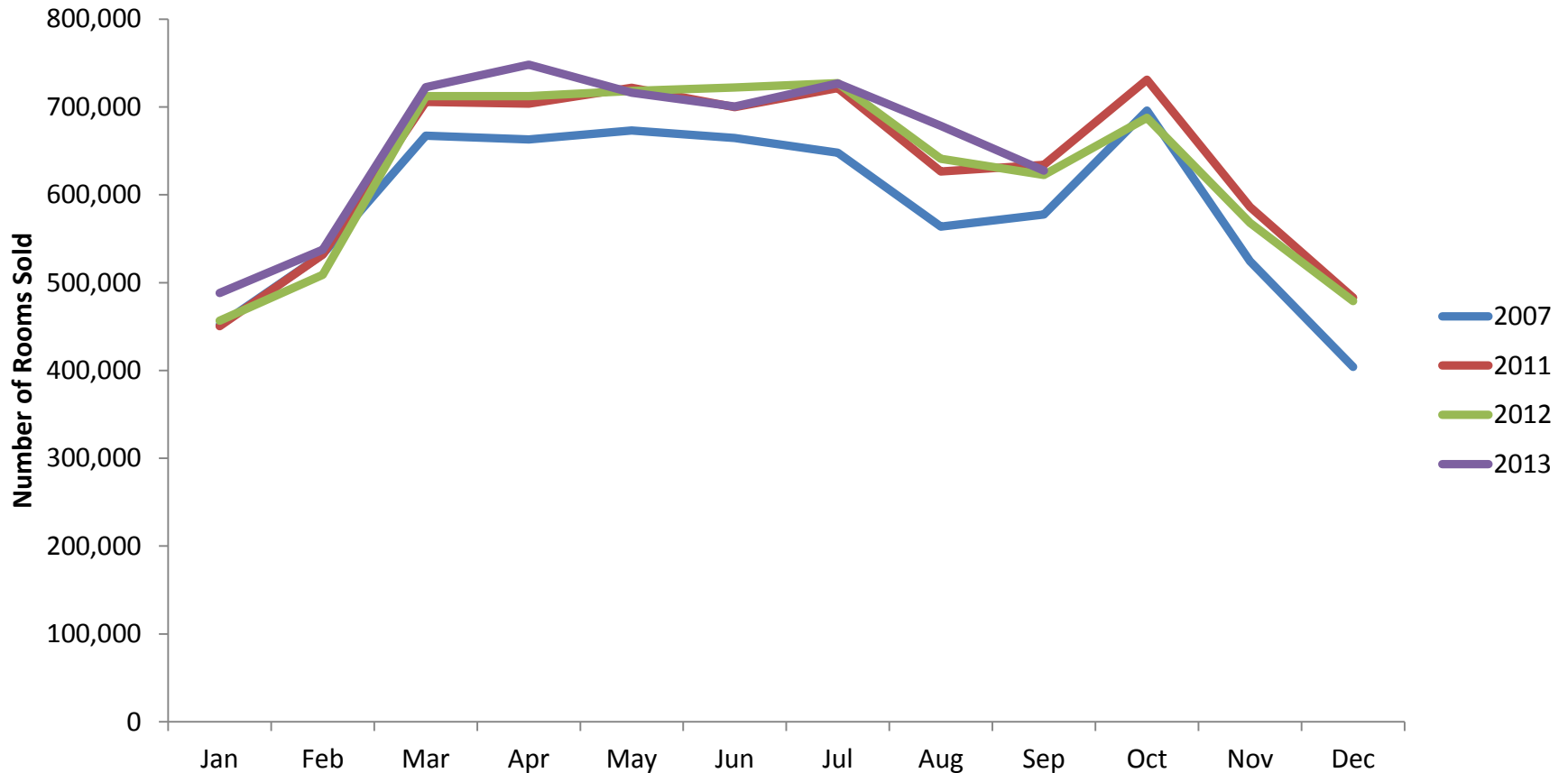
Source: Metropolitan Washington Airport Authority

DC HOTEL PERFORMANCE



For ADR, use left axis. For occupancy, use right axis.
Source: Smith Travel Research

2007, 2011, 2012, and 2013 YTD DC Hotel Demand



2012 YTD is through August 2013
Source: Smith Travel Research

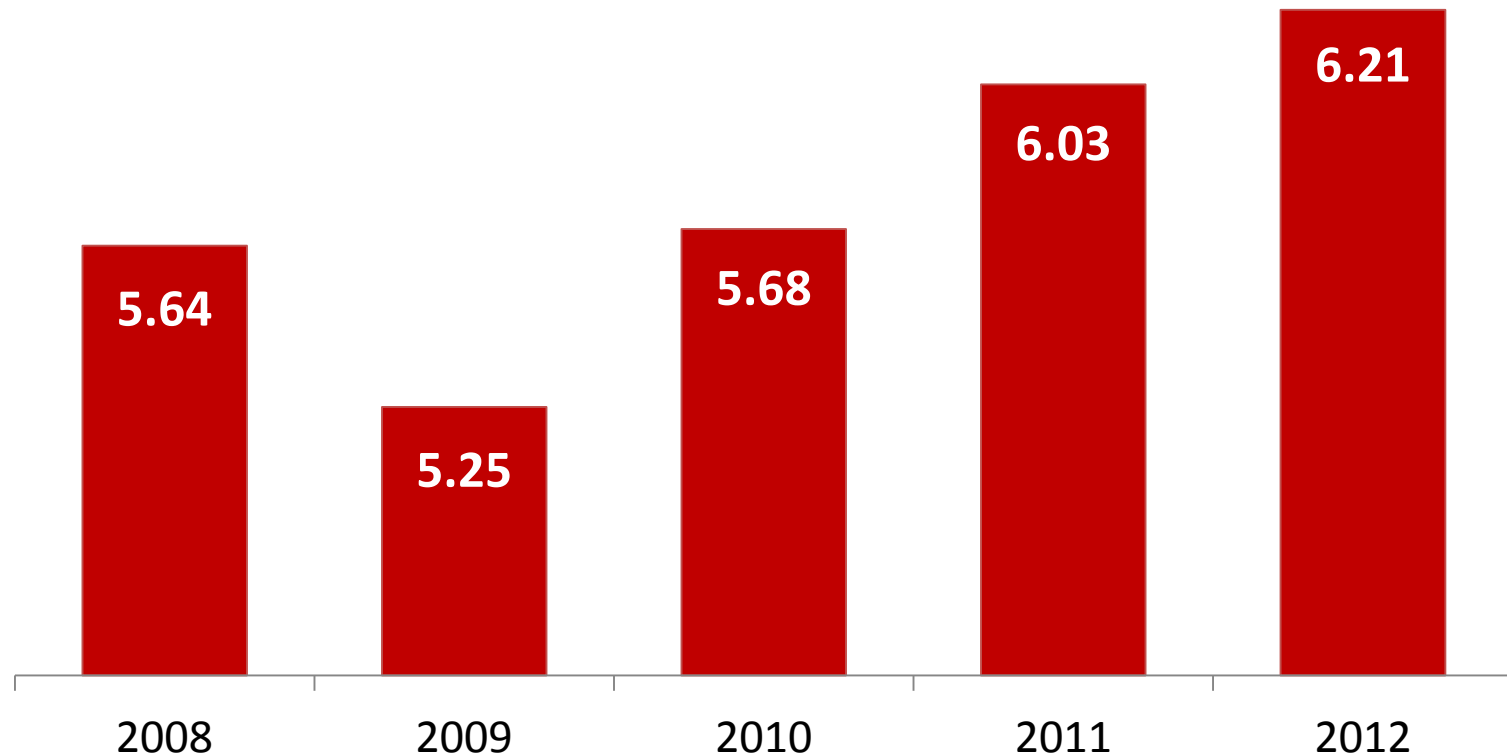


ADDITIONAL TOURISM INDICATORS	2012 Visitation	Percent Change 2011-12
National Park Service – Mall locations	23.4 million	8.9% ↑
National Park Service – all DC area locations	42.5 million	4.3% ↑
Smithsonian – Mall locations	24.7 million	5.0% ↑
Smithsonian – all DC locations	29.9 million	6.5% ↑
Total domestic arrivals (DCA+IAD)	17.5 million	-0.6% ↓
Total international arrivals (DCA+IAD)	3.5 million	3.3% ↑
WMATA Metro rail ridership	212.0 million	-2.3% ↓
Circulator ridership	5.7 million	-1.1% ↓

Sources: National Park Service, Smithsonian, Metropolitan Washington Airport Authority, Washington Metro Area Transit Authority, District Department of Transportation

VISITOR SPENDING

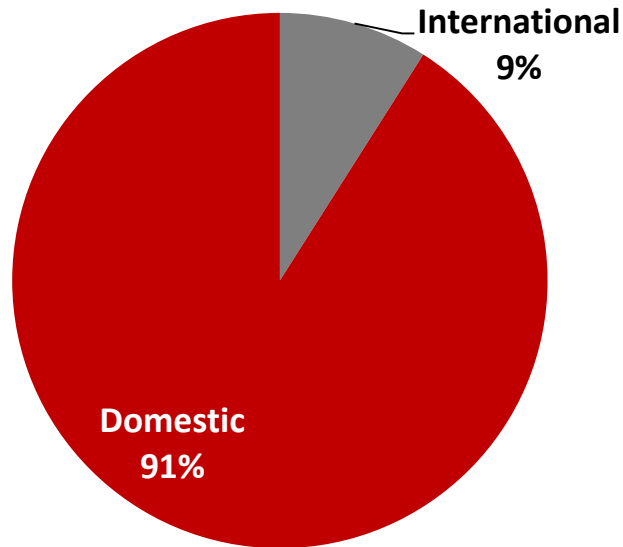
(IN BILLIONS \$)



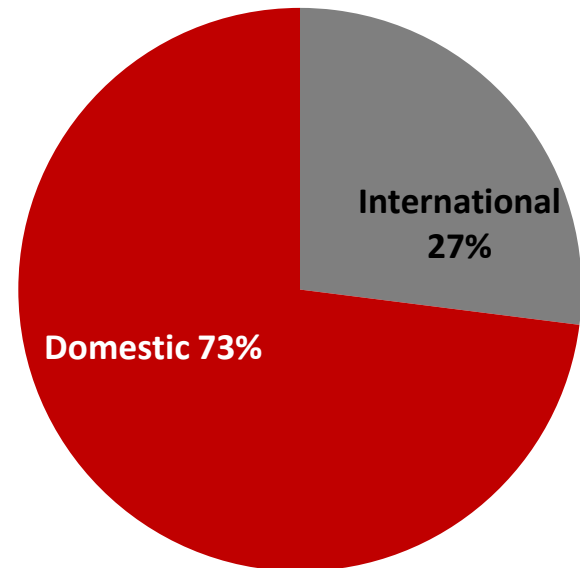
Includes both domestic and international spending.
Source: IHS, Inc.

DOMESTIC vs. INTERNATIONAL

Arrivals



Spend



Sources: Travel Market Insights, Office of Travel & Tourism Industries, U.S. Department of Commerce, IHS, Inc.

FACTS ABOUT TOURISM SPENDING

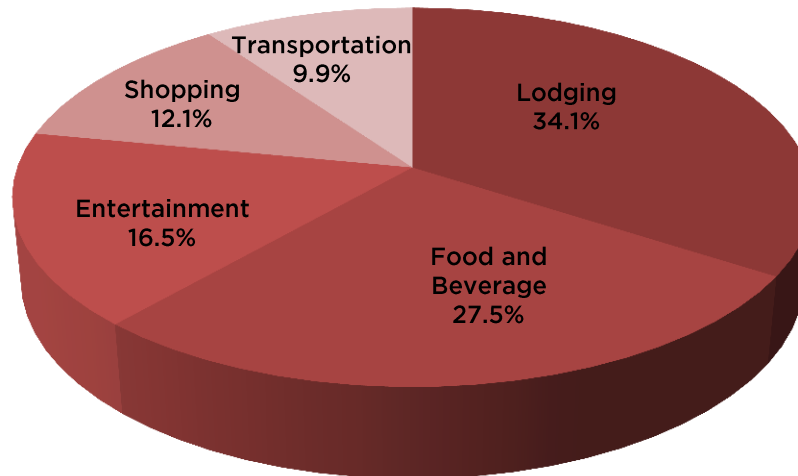
- If tourism did not exist in Washington, DC, the District would need to generate an average of **\$2,487 in local taxes** from each of the 271,160 households in DC, in order to maintain the current level of tax receipts.
- Travel and tourism spending supports **75,300 jobs** annually.
- Travel and tourism jobs support **\$3.16 billion in wages**.
- Domestic spending was up 1.6% to **\$4.50 billion**; international spending up 6.3% to **\$1.70 billion** in 2012.

Sources: IHS, Inc., D.K. Shifflet & Associates, Travel Market Insights, Office Travel & Tourism Industries, U.S. Dept of Commerce



DISTRIBUTION OF VISITOR SPENDING

Expenditure Category	2012 (\$)	% Change
Lodging	2.11 billion	-1.0% ↓
Food & Beverage	1.71 billion	4.7% ↑
Entertainment	1.02 billion	2.8% ↑
Shopping	753 million	7.8% ↑
Transportation	613 million	6.4% ↑



Source: IHS, Inc.

TAX REVENUE

Local Tax Revenue (\$)	
Corporate Income	36,802,396
Personal Income	32,020,924
Social Security & Other Taxes	620,501
Hotel Tax	212,565,755
Property Taxes	183,005,144
Excise & Fees	21,723,515
Sales Tax	187,656,061
Restaurant	119,487,765
Retail	58,122,531
Airport	7,155,614
Car Rental	2,890,151
Local Total	674,394,296

Federal Tax Revenue (\$)	
Corporate Income	41,742,939
Personal Income	45,546,060
Excise & Fees	57,424,418
Social Security & Other Taxes	225,789,940
Federal Total	370,503,357

**Local + Federal Total =
\$1.04 billion**

+2.3% change from 2011

Source: IHS, Inc.

WHAT DOES A VISITOR MEAN TO DC?

- Each DC visitor generates about **\$336 in expenditures**
- Every **245 visitors creates a new job** in DC
- Each visitor creates about \$56 in tax receipts, **\$36 of which goes to local government**
- Each visitor generates **\$171 in wages**
- Each visitor adds about **\$258 to Gross City Product**

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



CONVENTION FORECAST

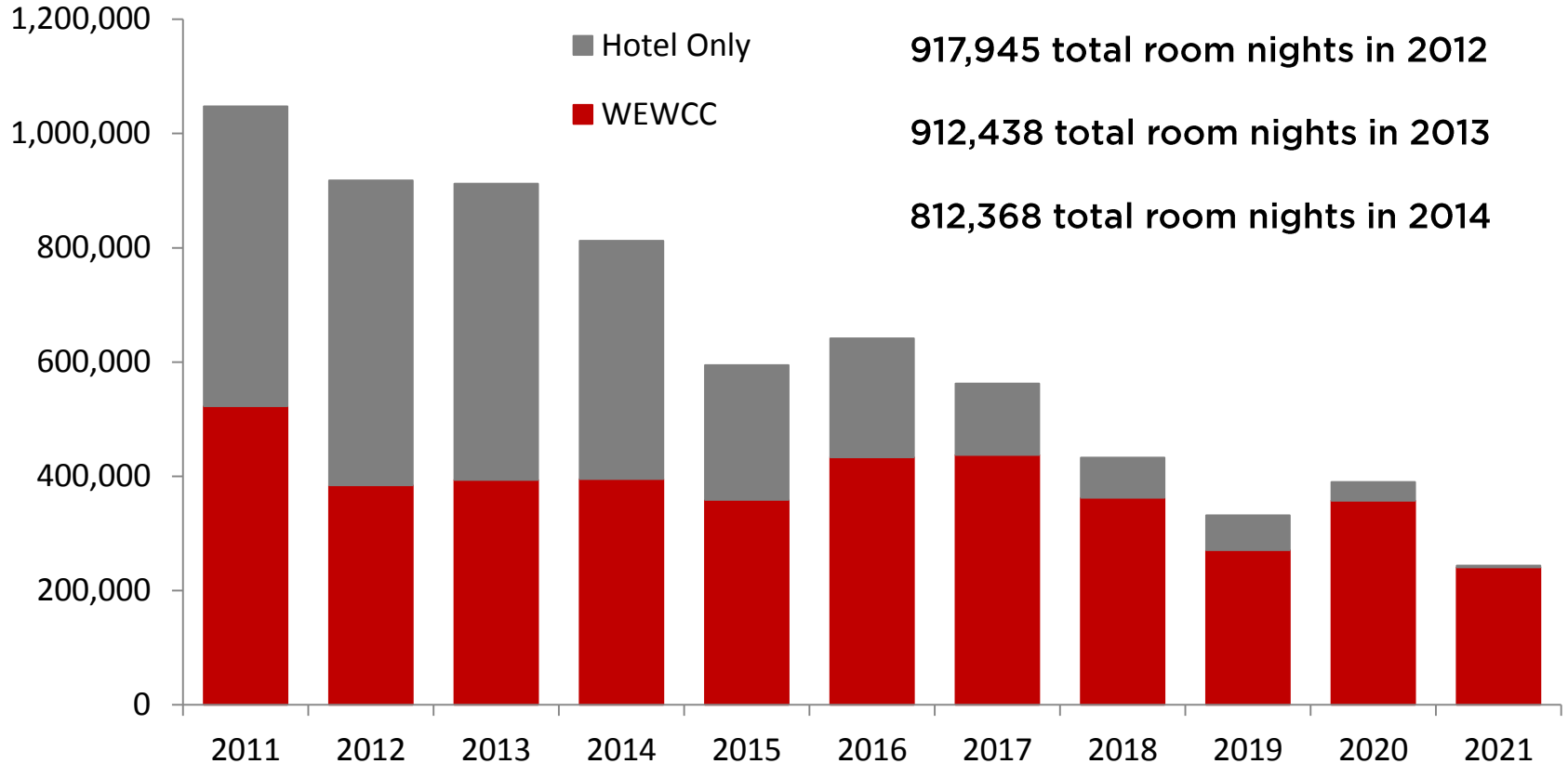


Chart reflects room nights confirmed as definite as of October 22, 2013
Source: Destination DC

Washington DC City Wide Bookings 2011 – 2021

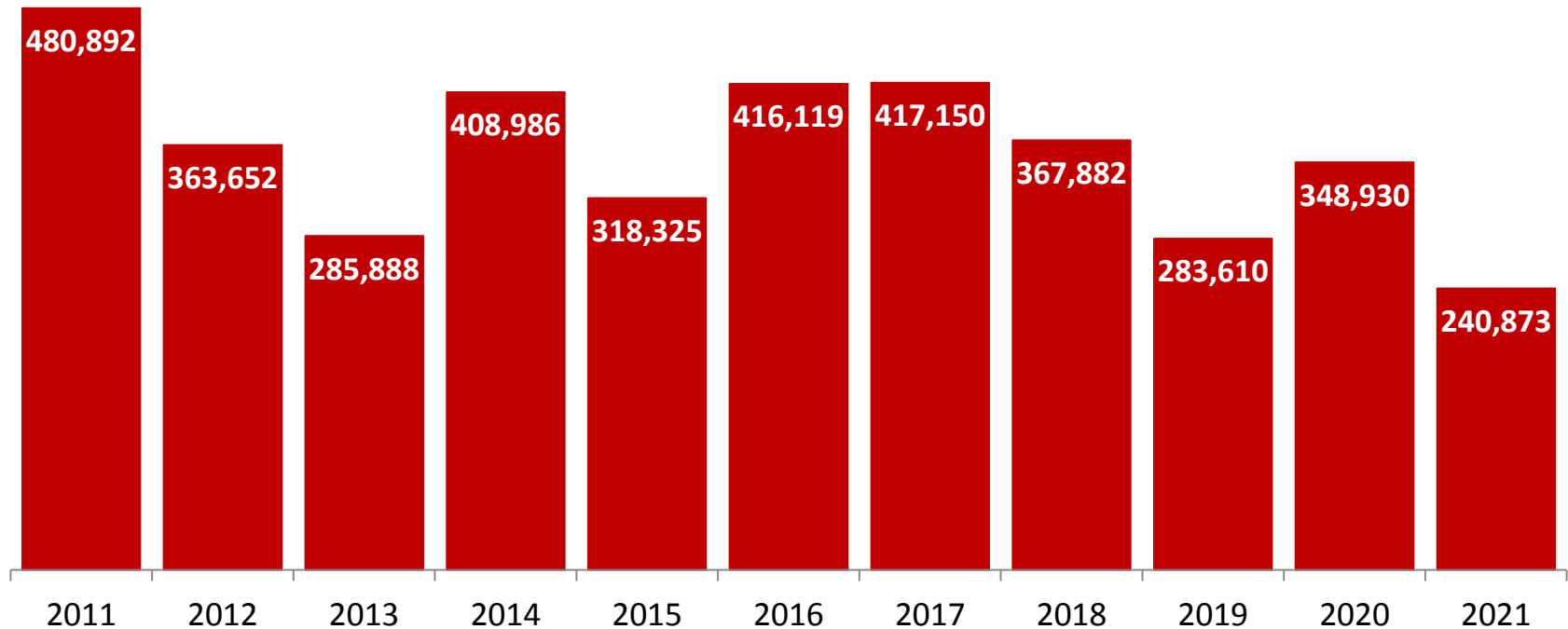
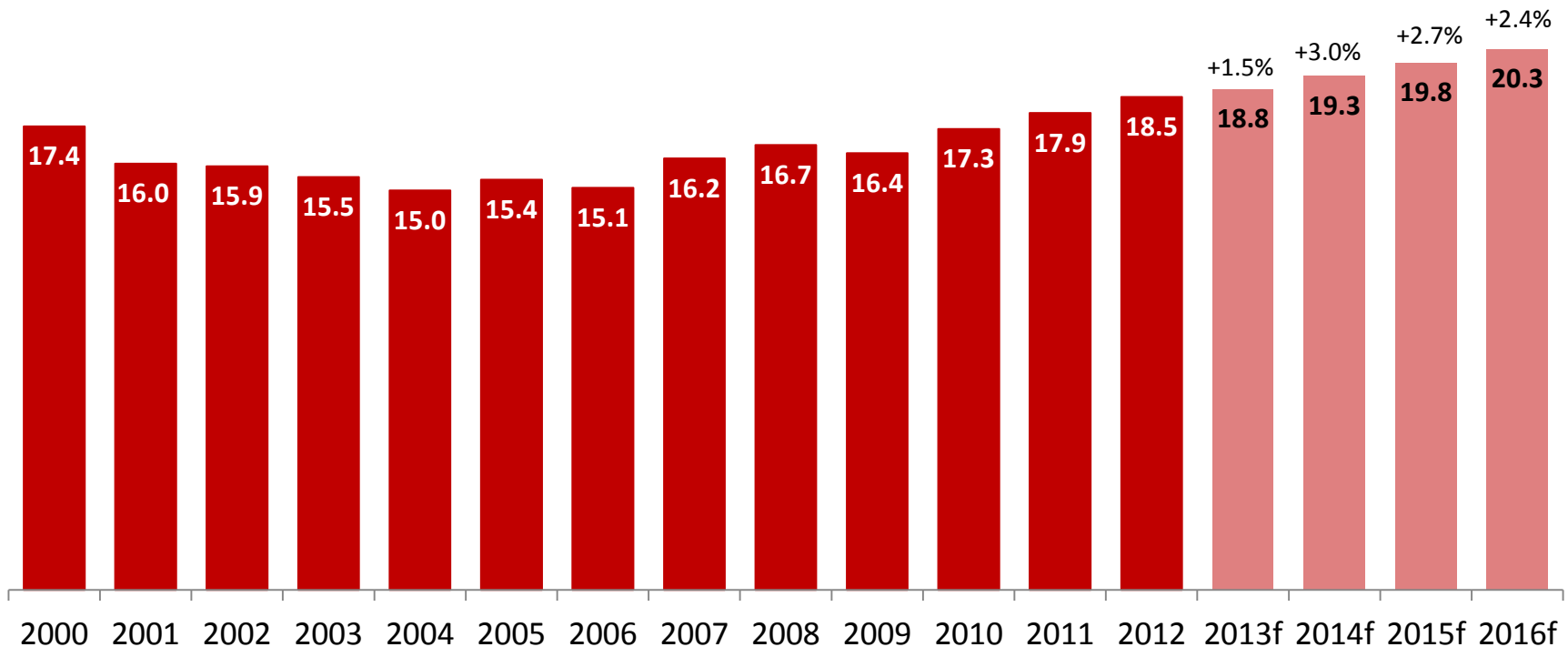


Chart reflects room nights confirmed as definite as of October 22, 2013
Source: Destination DC

VISITATION FORECAST

DC's total visitor volume in 2012 reached a record high and is expected to continue to increase through 2016.



Sources: IHS, Inc., D.K. Shifflet & Associates, Travel Market Insights, Office Travel & Tourism Industries, U.S. Dept of Commerce

METHODOLOGY

VISITOR VOLUME: D.K. SHIFFLET & ASSOCIATES

- Data are collected using an online panel methodology, contacting more 50,000 distinct U.S. households each month
- 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