

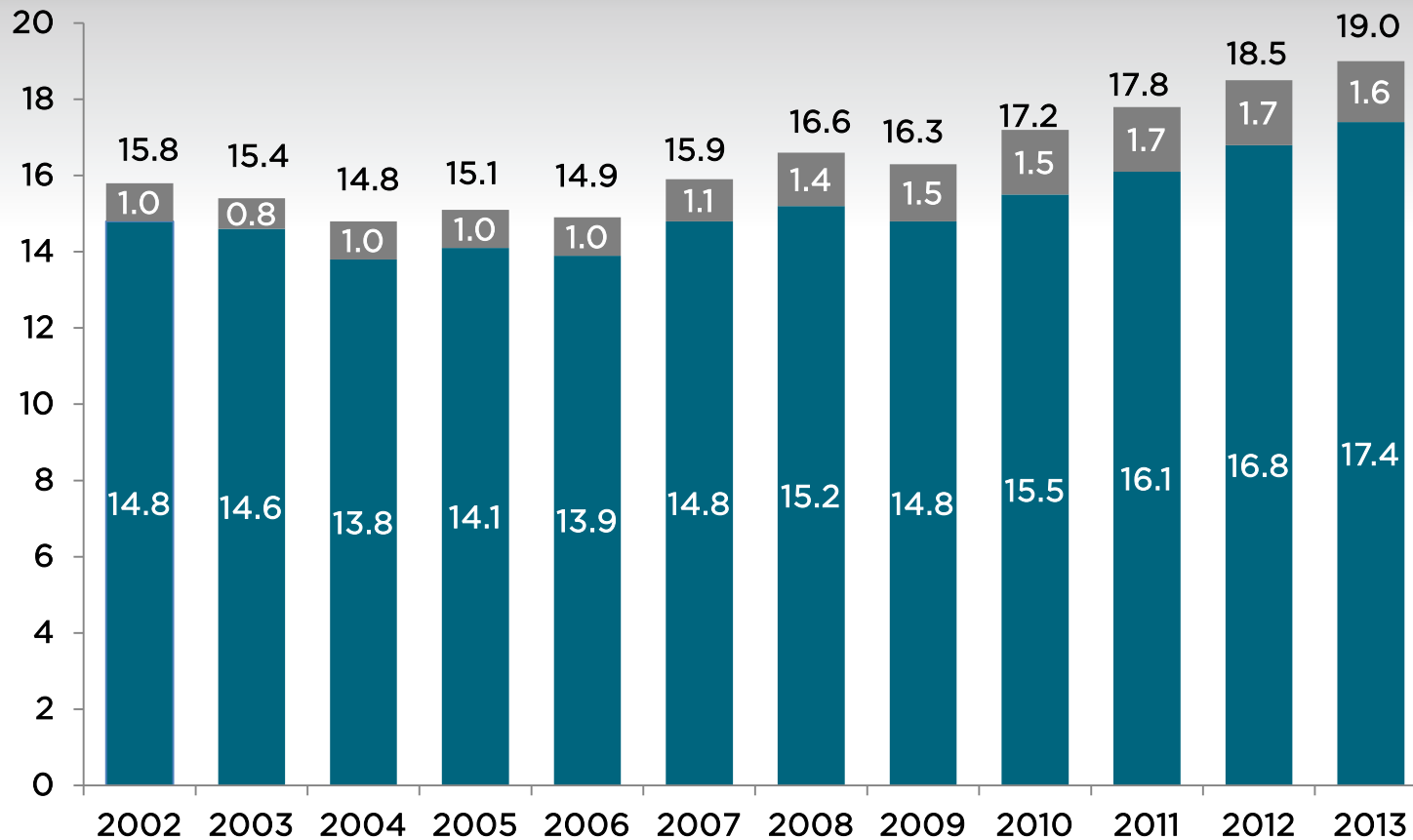


Washington, DC

2013 Visitor Statistics

TOTAL VISITATION TO WASHINGTON, DC

In Millions



In 2013, DC welcomed a total of 19.0 million visitors, setting a new record for the city.

Overseas visitation is for the District of Columbia only, and does not include Mexico or Canada.

■ Overseas
■ Domestic

Source: D.K. Shifflet & Associates; Travel Market Insights, National Travel & Tourism Office, International Trade Association, Department of Commerce

Destination (MSA)	2011	2012	2013	2013 Visitation
New York City	1	1	1	9.58 M
Miami	3	2	2	4.01 M
Los Angeles- Long Beach	2	3	3	3.78 M
Orlando	5	4	4	3.72 M
San Francisco	4	5	5	3.04 M
Las Vegas	5	6	6	2.85 M
Honolulu	8	7	7	2.56 M
Washington, DC	7	8	8	1.70 M
Chicago	10	9	9	1.38 M
Boston	9	10	10	1.28 M

- Washington, DC MSA dropped to #8 position for overseas visitation starting in 2012 as Honolulu saw a surge in visitation.
- The MSA rankings in 2013 remained the same as 2012.
- The Washington, DC MSA's overseas visitor volume decreased 3% in for 2013.

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

Source: Travel Market Insights, National Travel & Tourism Office, International Trade Association, Department of Commerce

Origin Country	2011	2012	2013	2013 Visitation
China	1	2	1	164 K
United Kingdom	2	1	2	157 K
Germany	3	3	3	126 K
South Korea	9	5	4	92 K
France	5	6	5	83 K
Brazil	4	7	6	68 K
Australia	6	4	7	67 K
Japan	11	8	8	67 K
India	12	9	9	57 K
Italy	7	10	10	44 K

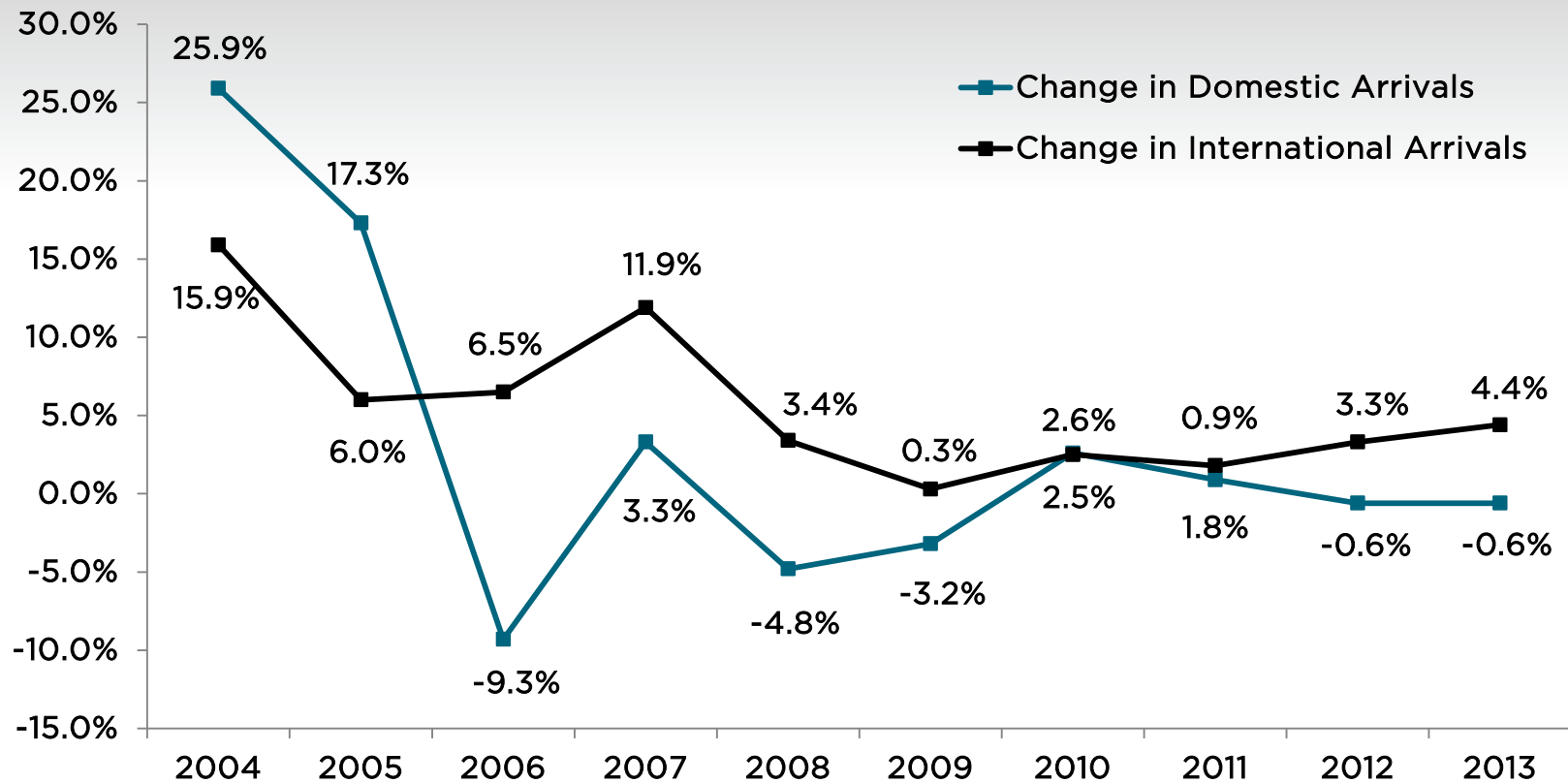
- China overtook the UK in 2013 to become the #1 country of origin for overseas visitors.
- South Korea rose from 9th in 2011 to 4th in 2013, with an increase in visitation of 48% over two years.

**Excludes Canada and Mexico; city statistics are for the District of Columbia*

Source: Travel Market Insights, National Travel & Tourism Office, International Trade Association, Department of Commerce

CHANGE IN AIRPORT ARRIVALS

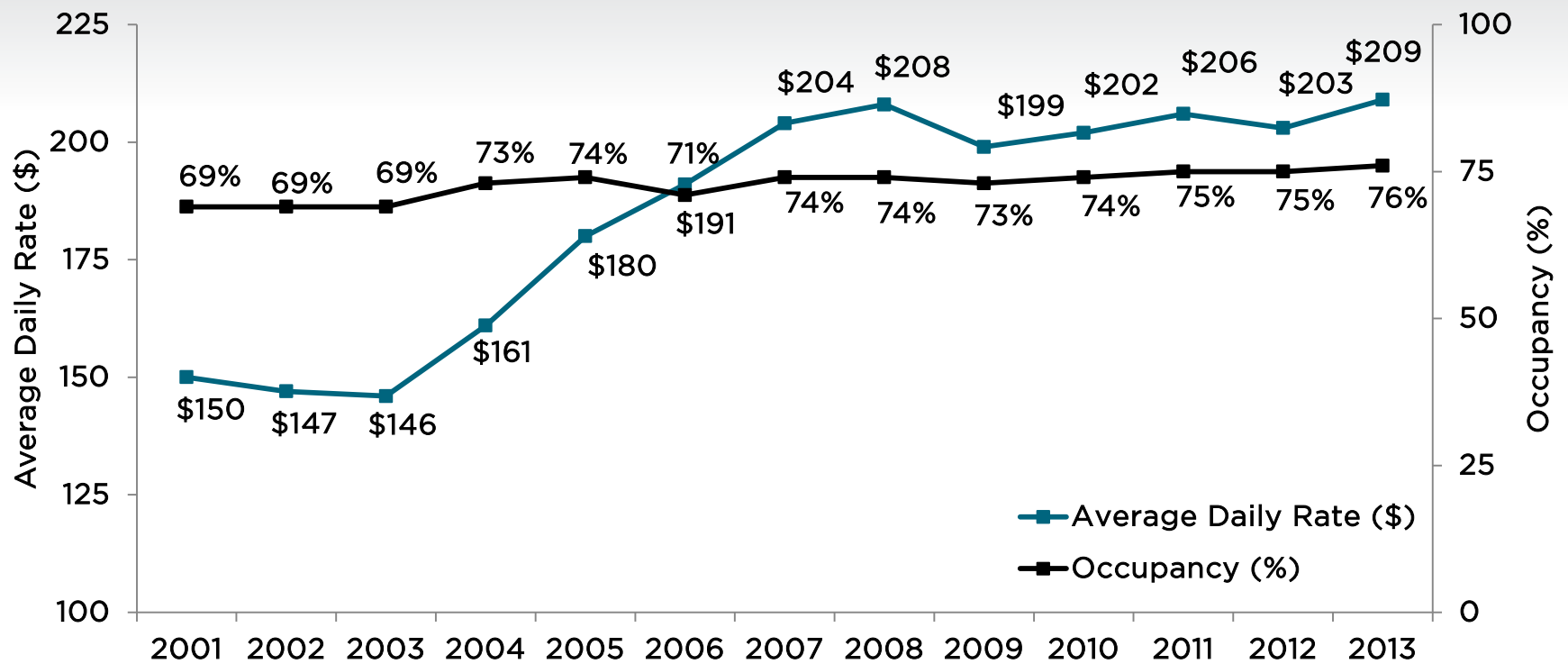
Dulles International Airport and Reagan National Airport



Source: Metropolitan Washington Airports Authority

WASHINGTON, DC HOTEL PERFORMANCE

2001-2013

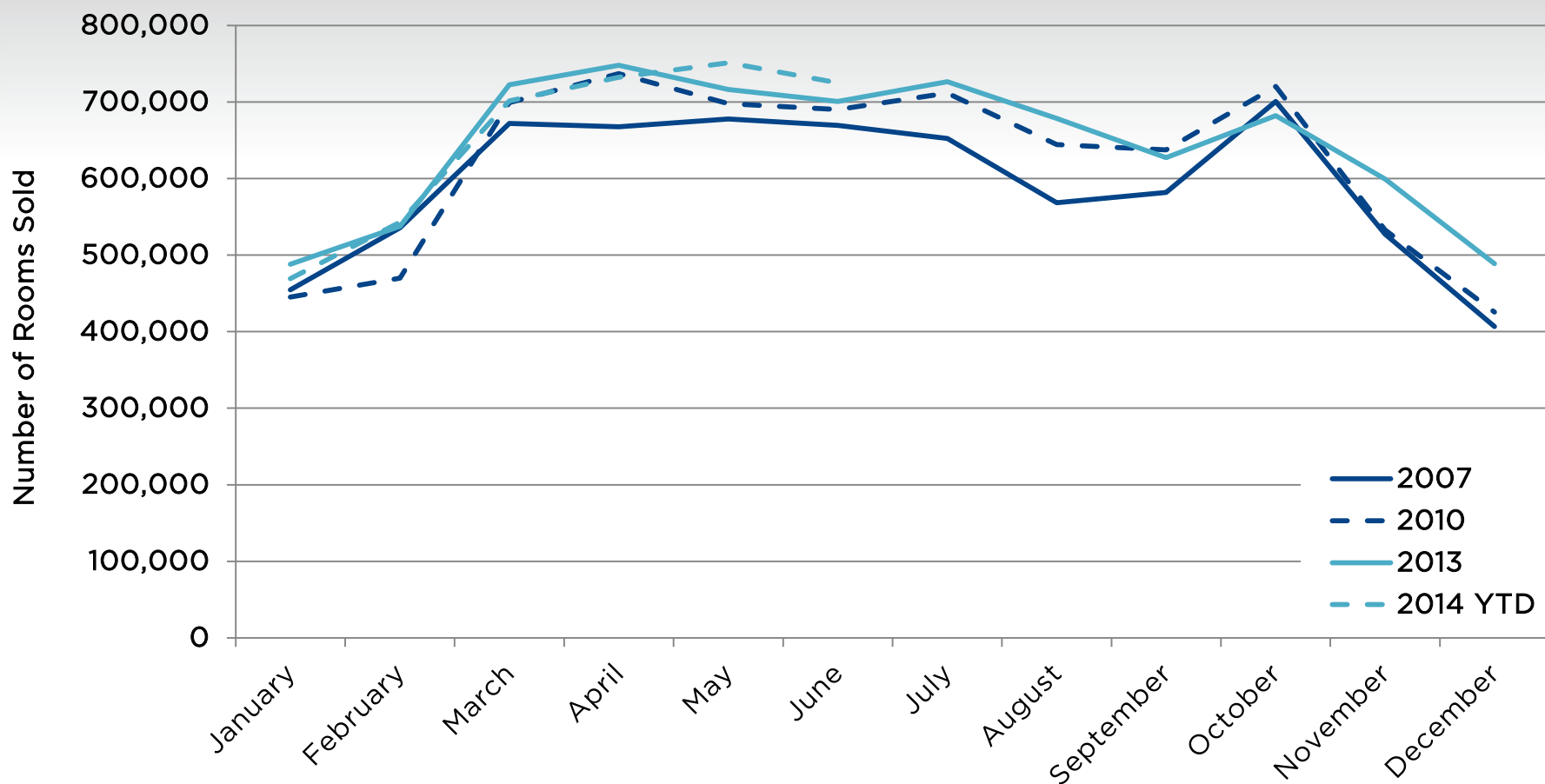


For ADR, use left axis. For occupancy, use right axis.

Source: Smith Travel Research

Washington, DC Hotel Demand

2007, 2010, 2013 and 2014 YTD



2014 YTD is through June 2014

Source: Smith Travel Research

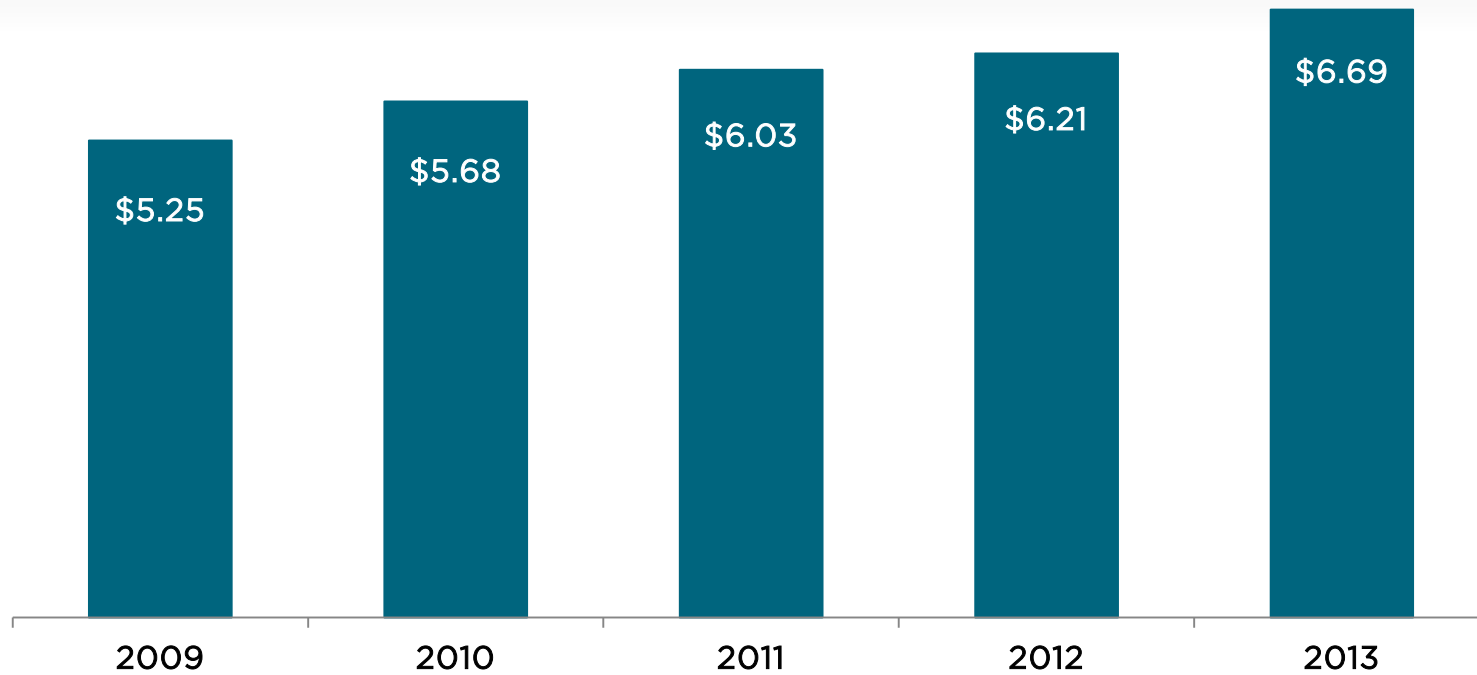
ADDITIONAL TOURISM INDICATORS	2013 Visitation	Percent Change 2012-13
National Park Service – Mall locations	27.5 million	2.5% ↓
National Park Service – All DC area locations	43.5 million	2.1% ↓
Smithsonian – Mall locations	24.2 million	1.9% ↓
Smithsonian – All DC locations	29.0 million	2.8% ↓
Total Domestic Arrivals (DCA+IAD)	17.4 million	-0.6% ↓
Total International Arrivals (DCA+IAD)	3.7 million	4.4% ↑
Circulator Ridership	5.6 million	-1.8% ↓

Sources: National Park Service, Smithsonian Institution, Metropolitan Washington Airports Authority, District Department of Transportation



WASHINGTON, DC VISITOR SPENDING

In Billions



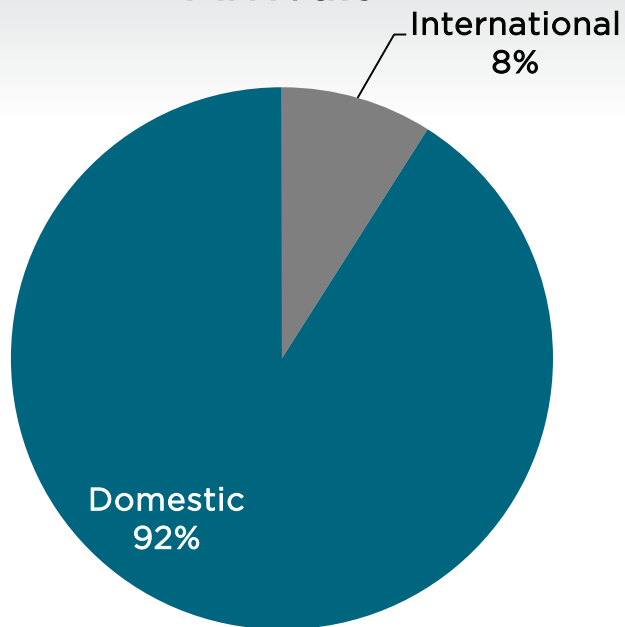
Includes both domestic and international spending.

Source: IHS Global

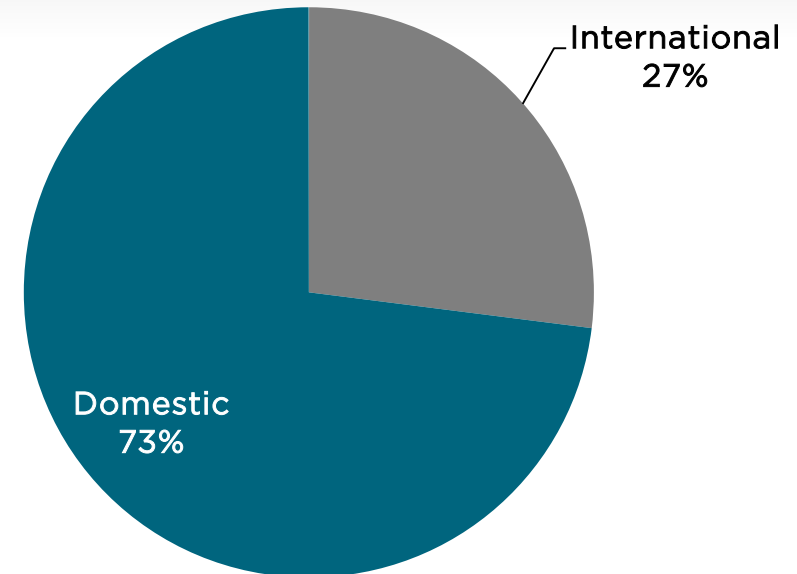
WASHINGTON, DC DOMESTIC VS. INTERNATIONAL VISITATION

Arrivals and Spending

Arrivals



Spending



Source: D.K. Shifflet & Associates; Travel Market Insights, National Travel & Tourism Office, International Trade Association, Department of Commerce; IHS Global

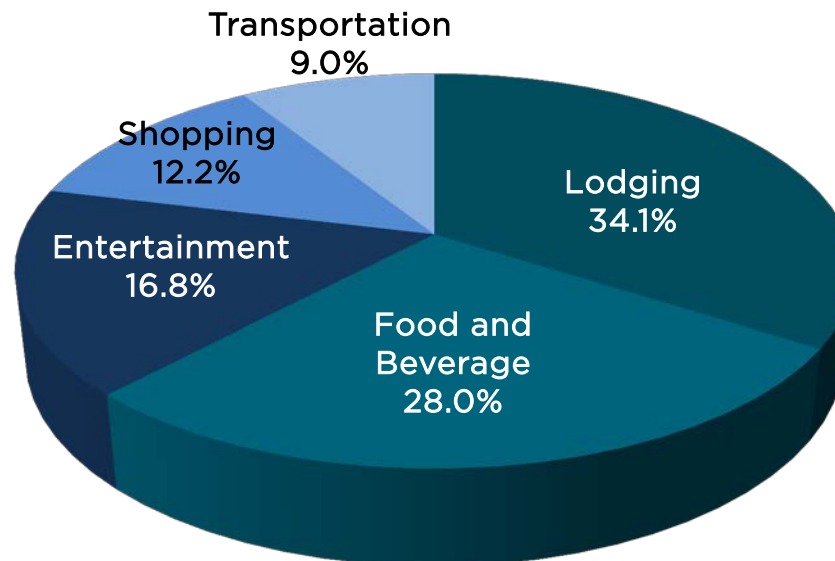
- If tourism did not exist in Washington, DC, the District would need to generate an average of **\$2,444 in local taxes** from each of the 290,841 households in DC, in order to maintain the current level of tax receipts.
- Travel and tourism spending supports **75,741 jobs** annually.
- Travel and tourism jobs support **\$3.65 billion in wages**.
- Domestic spending was up 8.9% to **\$4.9 billion**; international spending up 5.9% to **\$1.8 billion** in 2013.

Sources: IHS Global

DISTRIBUTION OF VISITOR SPENDING

In Washington, DC

Expenditure Category	2013 (\$)	% Change
Lodging	2.28 billion	7.7% ↑
Food & Beverage	1.87 billion	9.6% ↑
Entertainment	1.12 billion	9.8% ↑
Shopping	817 million	8.6% ↑
Transportation	601 million	-2.0% ↓



Source: IHS Global



TAX REVENUE

In Washington, DC

Local Tax Revenue (\$)	
Corporate Income	19,844,306
Personal Income	40,333,027
Social Security & Other Taxes	1,348,766
Hotel Tax	223,276,086
Property Taxes	202,613,087
Excise & Fees	18,969,455
Sales Tax	204,404,519
Restaurant	130,967,797
Retail	63,385,912
Airport	7,159,874
Car Rental	2,890,935
Local Total	710,789,246

Federal Tax Revenue (\$)	
Corporate Income	84,572,380
Personal Income	136,714,207
Excise & Fees	48,857,813
Social Security & Other Taxes	318,858,534
Federal Total	589,002,934

**Local + Federal Total =
\$1.30 billion**

+7.0% change from 2012

Source: IHS Global

- Each Washington, DC visitor generates about **\$352 in expenditures**
- Every **258 visitors creates a new job** in Washington, DC.
- Each visitor creates about \$68 in tax receipts, **\$37 of which goes to local government.**
- Each visitor generates **\$192 in wages.**
- Each visitor adds about **\$294 to Gross City Product.**

Sources: IHS Global, D.K. Shifflet & Associates, Travel Market Insights, National Travel & Tourism Office, International Trade Association, Department of Commerce

WASHINGTON, DC CONVENTION FORECAST

2012-2021

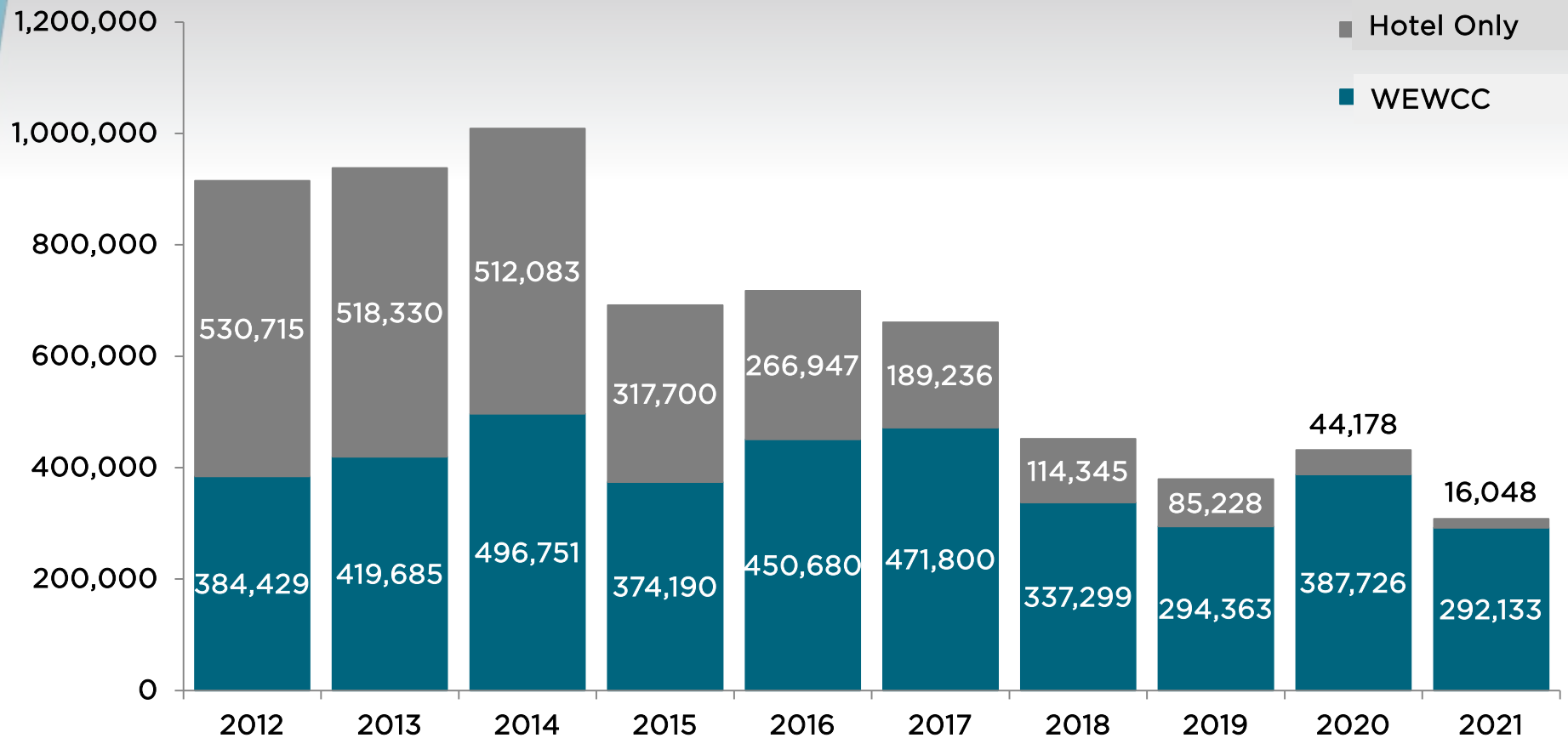


Chart reflects room nights confirmed as definite as of August 19, 2014

Source: Destination DC



WASHINGTON, DC CITY WIDE BOOKINGS

2012-2021

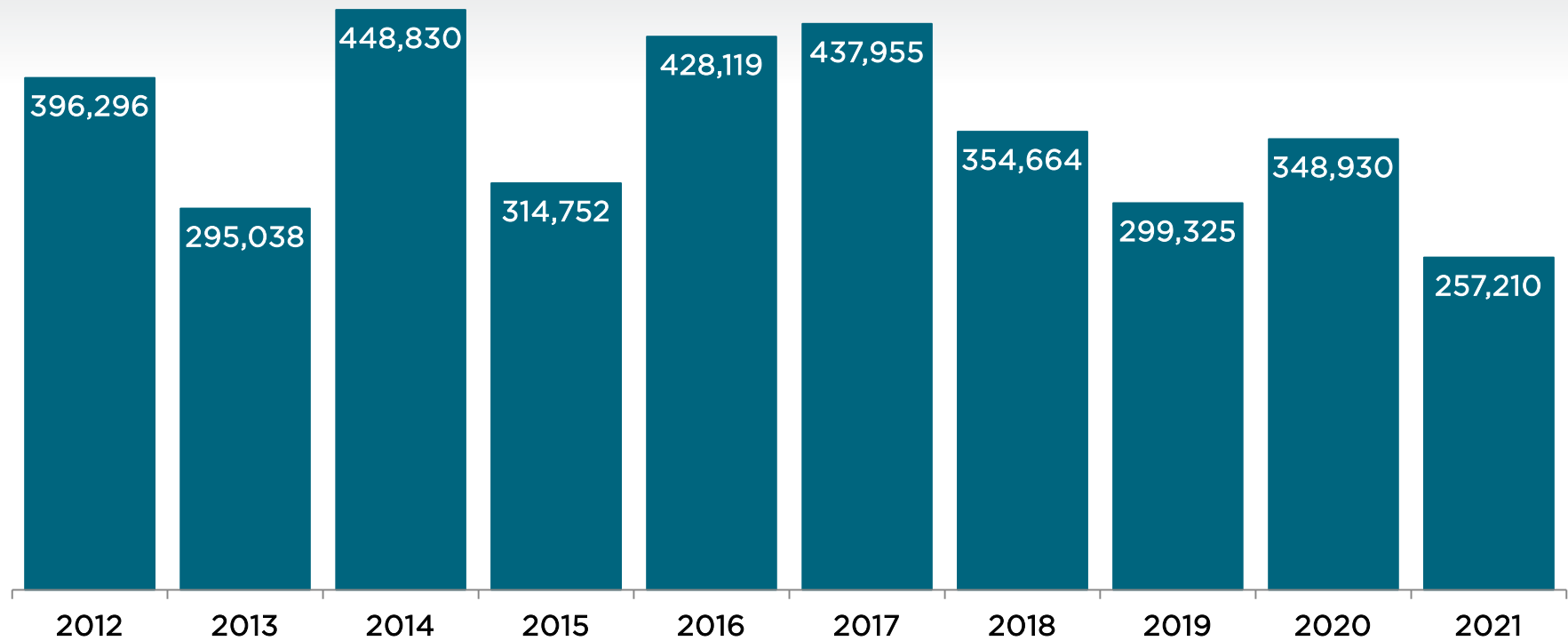
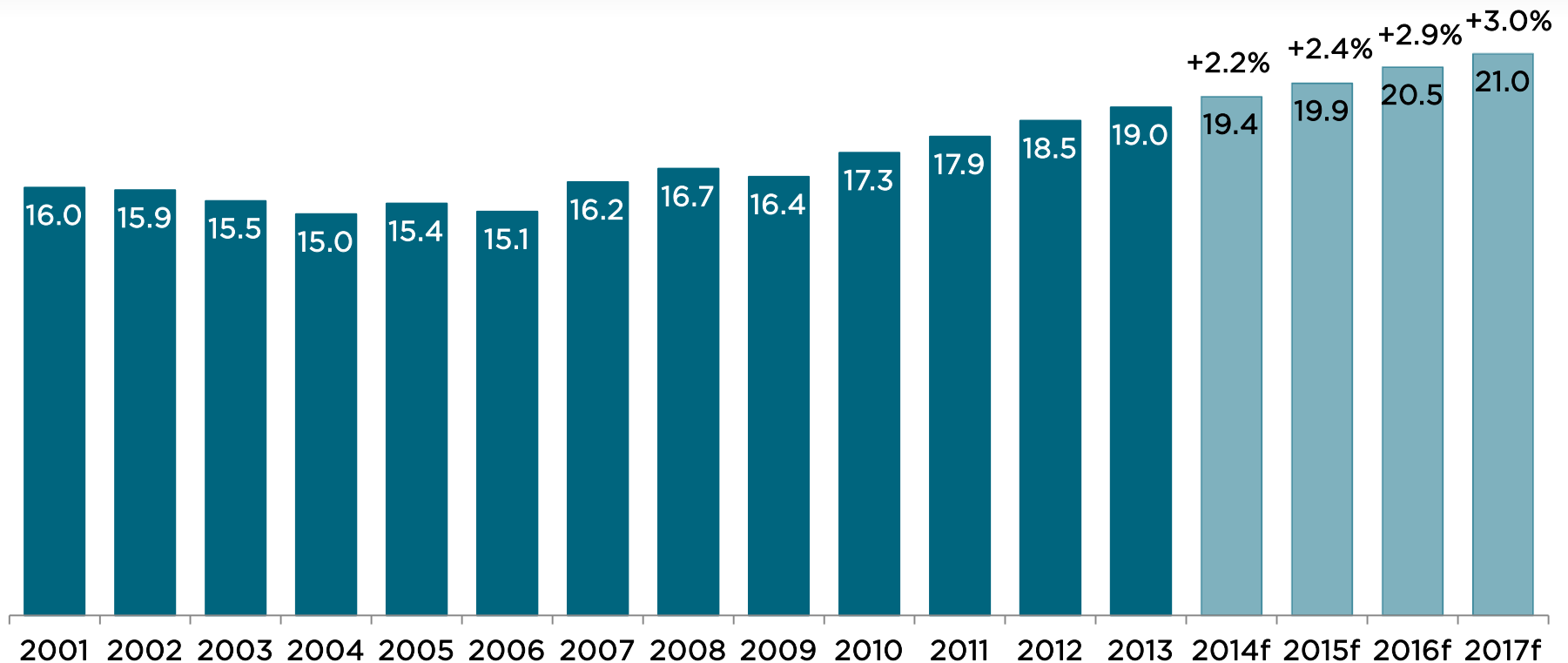


Chart reflects room nights confirmed as definite as of August 1, 2014
Source: Destination DC

WASHINGTON, DC VISITATION FORECAST

Through 2017

DC's total visitor volume in 2013 reached a record high and is expected to continue to increase by 2 to 3% each year through 2017.



Sources: IHS Global, D.K. Shifflet & Associates, Travel Market Insights, National Travel & Tourism Office, International Trade Association, Department of Commerce

VISITOR VOLUME: D.K. SHIFFLET & ASSOCIATES

- Data is collected using an online panel methodology, contacting more 50,000 distinct U.S. households each month.
- Data is weighted by key demographics to balance the sample to the U.S. population.

VISITOR FORECAST AND ECONOMIC IMPACT

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