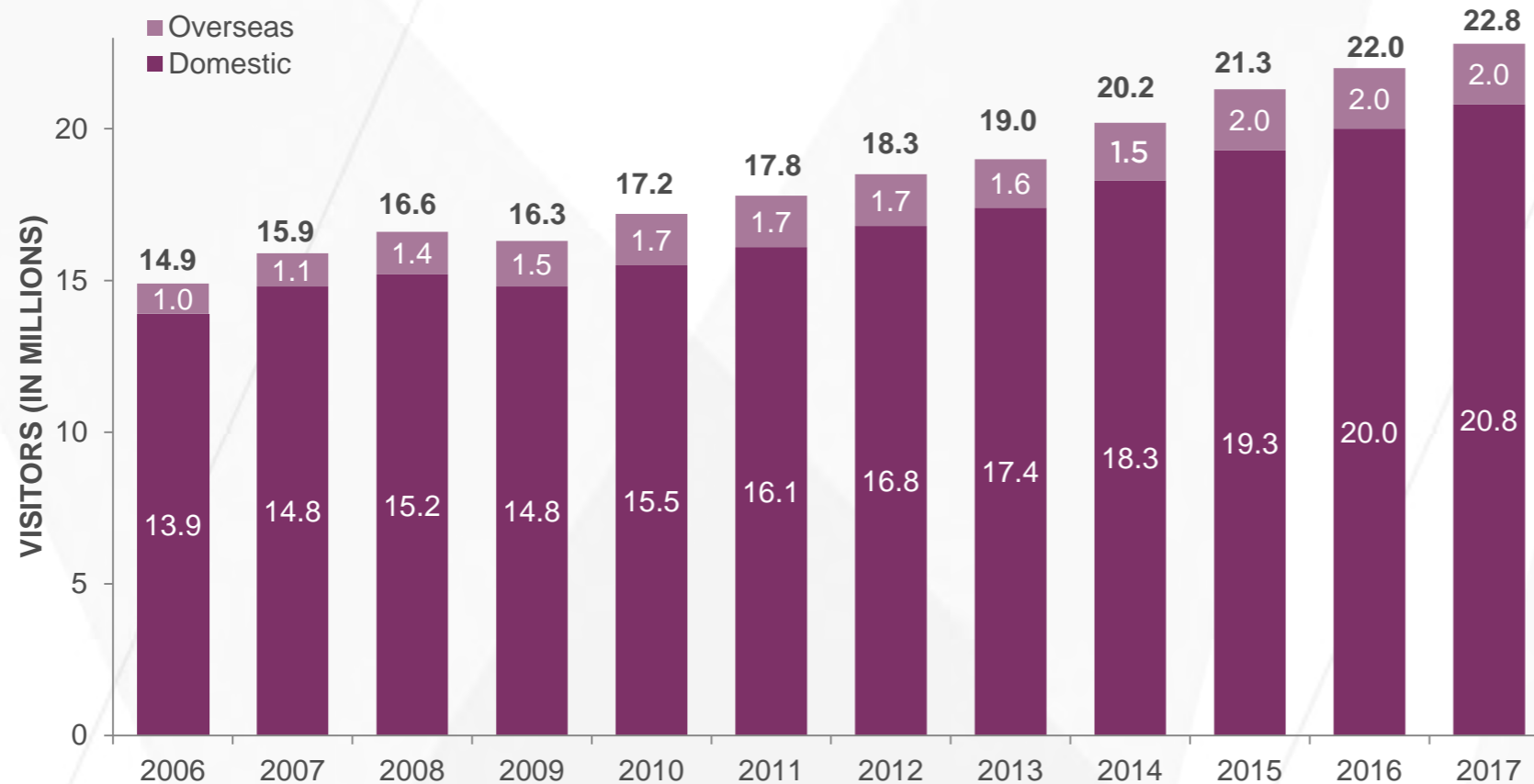




2017 VISITOR STATISTICS WASHINGTON, DC

TOTAL VISITATION TO WASHINGTON, DC

WASHINGTON, DC (DISTRICT OF COLUMBIA)



In 2017, DC welcomed a total of 22.8 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.

Sources: DK Shifflet; Travel Market Insights, National Travel & Tourism Office, U.S. Department of Commerce

OVERSEAS VISITATION WASHINGTON, DC (DISTRICT OF COLUMBIA)

Origin Country	2015	2016	2017	2017 Visitation
China	1	1	1	324 K
United Kingdom	2	2	2	194 K
Germany	3	3	3	136 K
South Korea	7	6	4	131 K
France	5	4	5	99 K
Australia	4	7	6	90 K
India	6	5	7	80 K
Japan	9	10	8	65 K
Spain	NA	9	9	64 K
Italy	9	8	10	63 K

China overtook the UK in 2013 to become the #1 country of origin for overseas visitors to DC.

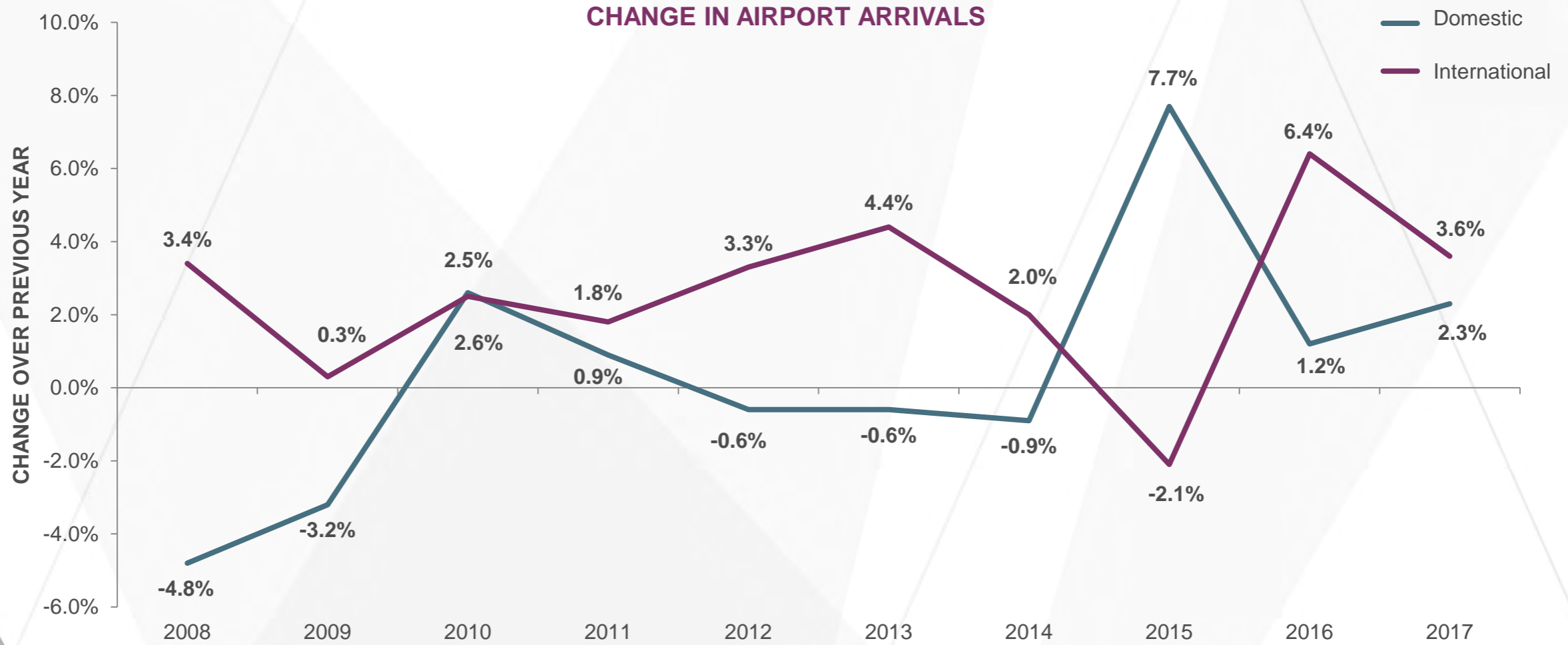
China saw an increase in visitation of 7% over 2016.

Australia rose to 6th in 2017.

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

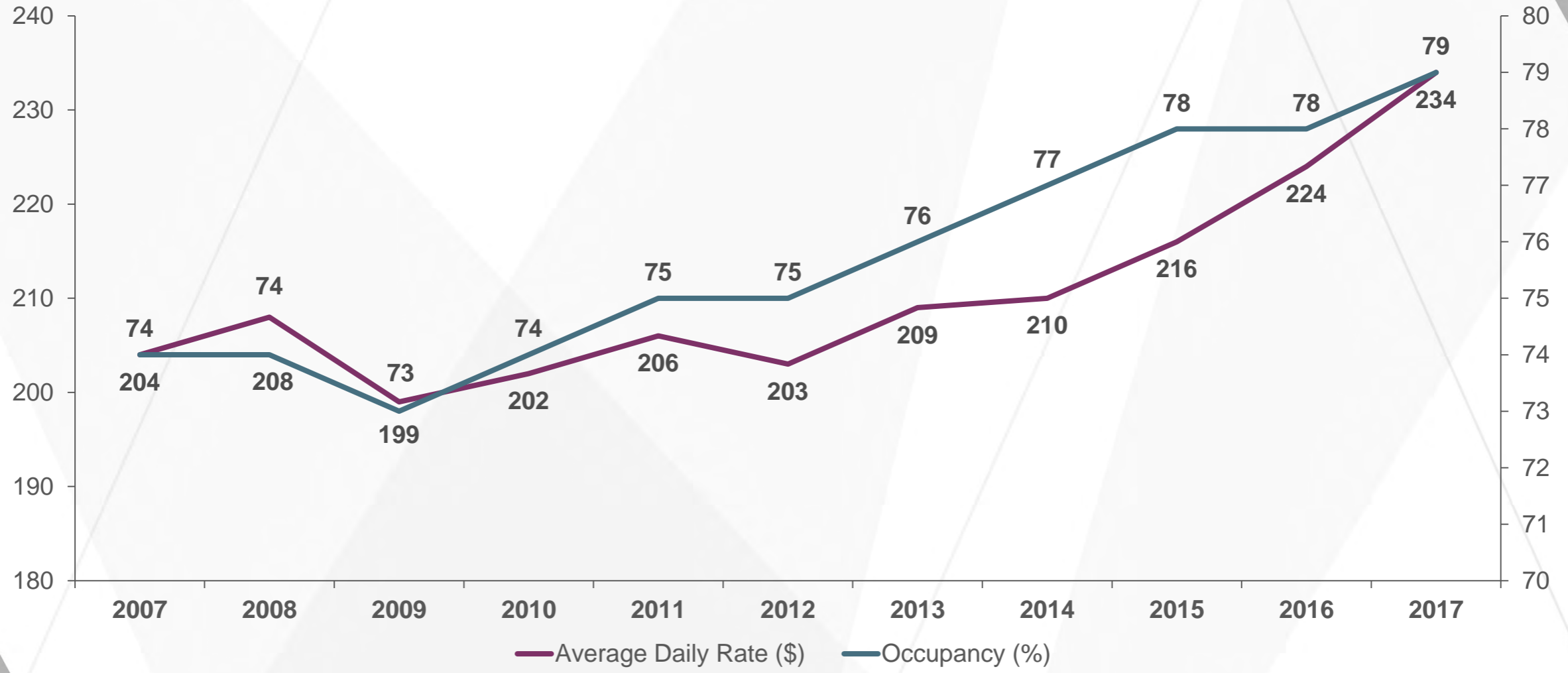
Source: Travel Market Insights, National Travel & Tourism Office, U.S. Department of Commerce

AIRPORT ARRIVALS DCA AND IAD



Source: Metropolitan Washington Airports Authority

HOTEL PERFORMANCE WASHINGTON, DC (DISTRICT OF COLUMBIA) ANNUAL AVERAGE DAILY RATE AND OCCUPANCY



For ADR, use left axis; for occupancy, use right axis
Source: STR

TOURISM INDICATORS

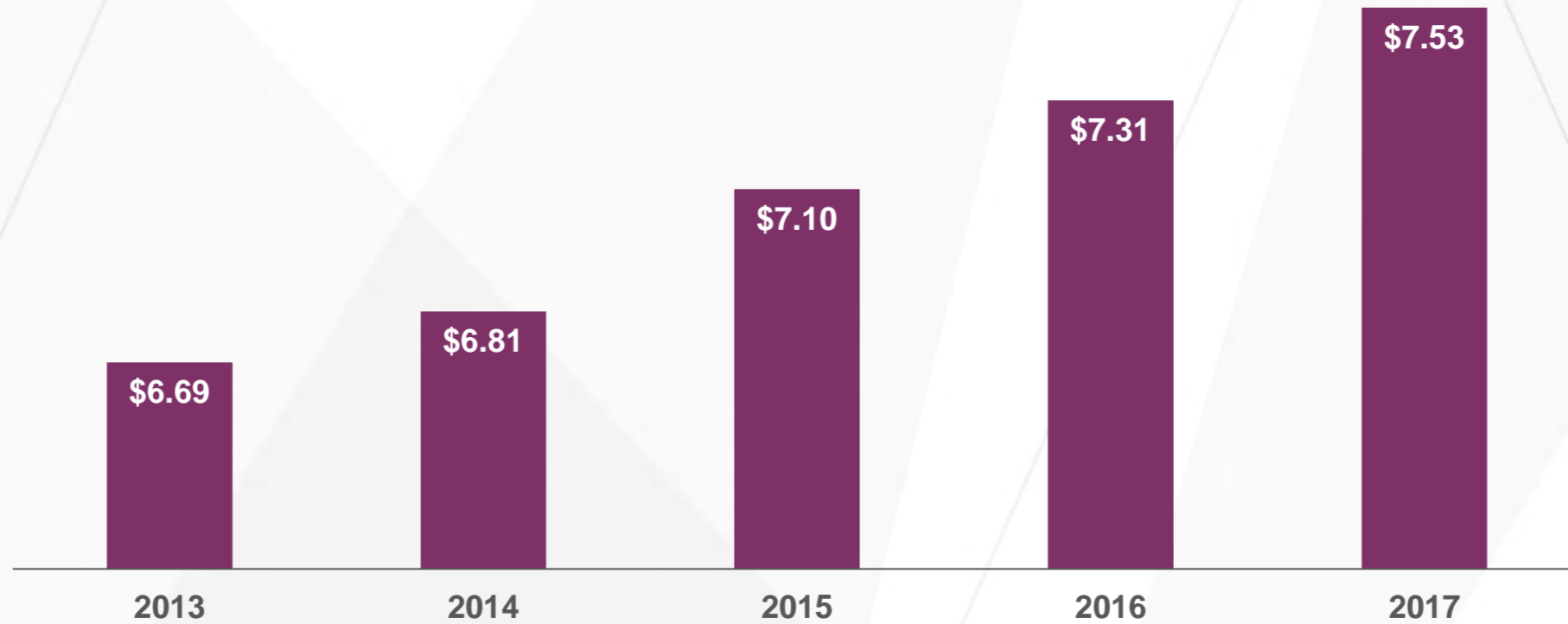
2015 VS. 2016

ADDITIONAL TOURISM INDICATORS	2017 Visitation	Percent Change 2016-17
National Park Service – Mall locations	32.6 million	3.7% ↓
National Park Service – All DC area locations	35.7 million	3.3% ↓
Smithsonian – Mall locations	23.3 million	2.5% ↑
Smithsonian – All DC area locations	29.1 million	0.7% ↓
Total Domestic Arrivals (DCA+IAD)	19.3 million	2.3% ↑
Total International Arrivals (DCA+IAD)	4.1 million	3.6% ↑

Sources: National Park Service, Smithsonian Institution, Metropolitan Washington Airports Authority

VISITOR SPENDING DOMESTIC & INTERNATIONAL

VISITOR SPENDING (IN BILLIONS)

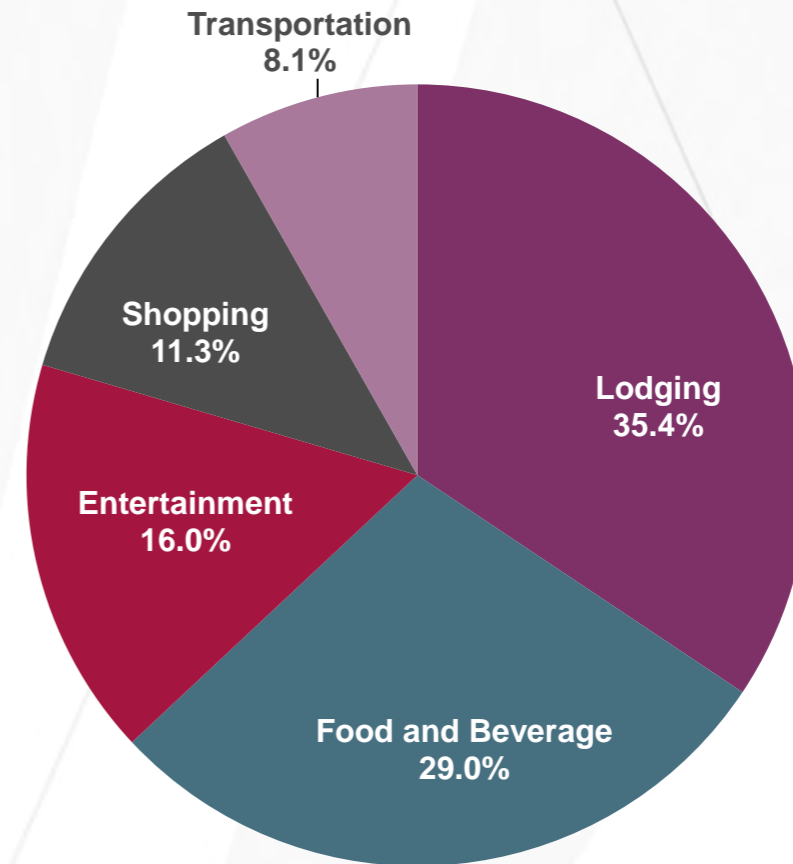


Includes both domestic and international spending

Source: IHS Markit

VISITOR SPENDING WASHINGTON, DC (DISTRICT OF COLUMBIA)

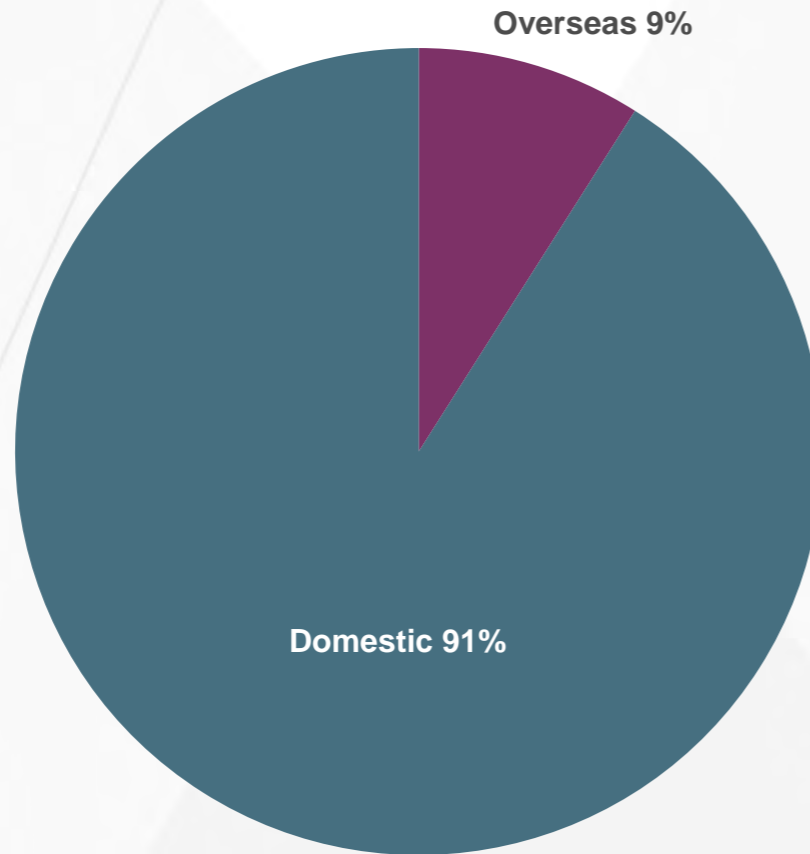
Expenditure Category	2017 (\$)	% Change
Lodging	2.67 billion	6.5% ↑
Food and Beverage	2.18 billion	4.2% ↑
Entertainment	1.20 billion	0.4% ↓
Shopping	864 million	3.0% ↓
Transportation	612 million	1.3% ↑



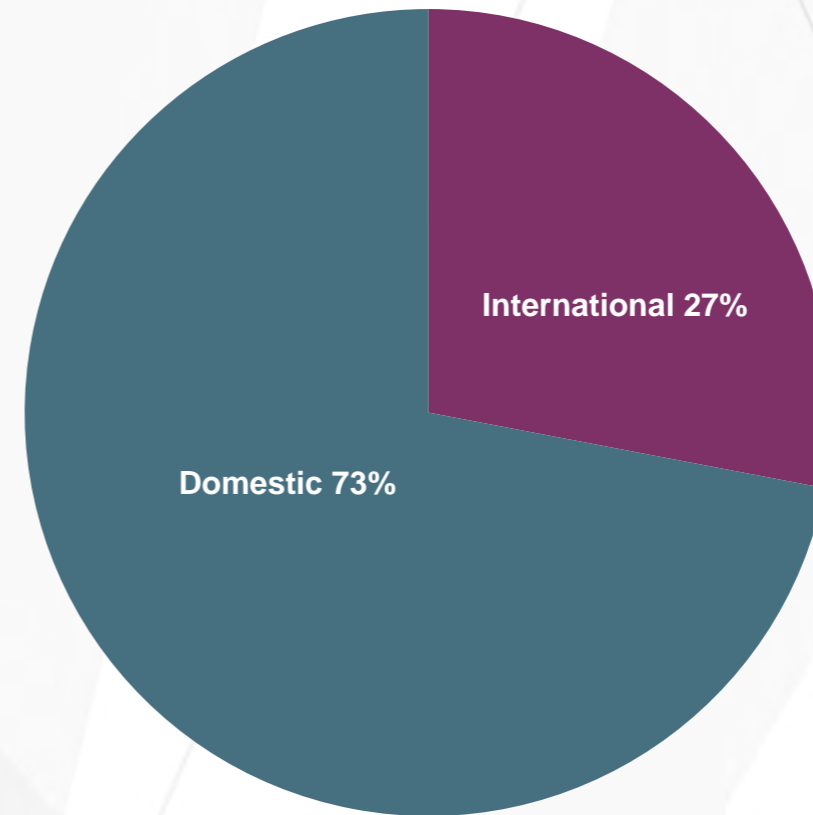
Source: IHS Markit

DOMESTIC VS. INTERNATIONAL VISITATION & SPENDING

ARRIVALS



SPENDING



Sources: DK Shifflet; Travel Market Insights, National Travel & Tourism Office, U.S. Department of Commerce; IHS Markit

TAX REVENUE

VISITORS TO WASHINGTON, DC (DISTRICT OF COLUMBIA)

Local Tax Revenue (\$)	
Corporate Income	20,027,013
Personal Income	46,404,828
Social Security & Other Taxes	1,539,211
Occupancy Tax	279,064,309
Property Taxes	215,949,992
Excise & Fees	21,371,318
Sales Tax	229,607,953
Restaurant	151,947,294
Retail	67,453,038
Airport	7,338,595
Car Rental	2,869,025
Local Total	813,964,624

Federal Tax Revenue (\$)	
Corporate Income	85,351,035
Personal Income	157,295,394
Excise & Fees	51,634,005
Social Security & Other Taxes	364,458,926
Federal Total	658,739,360

Local + Federal Total =
\$1.43 billion

+3.1% change from 2016

Source: IHS Markit

TOURISM IMPACT WASHINGTON, DC (DISTRICT OF COLUMBIA)

- If tourism did not exist in Washington, DC, the District would need to generate an average of **\$2,656 in local taxes** from each of the 306,482 households in DC in order to maintain the current level of tax receipts.
- Travel and tourism spending supports **75,048 jobs** annually.
- Travel and tourism jobs support **\$4.18 billion in wages**.
- Domestic spending was up 3.4% to **\$5.5 billion**; international spending up 2.3% to **\$2.1 billion** in 2017.

Source: IHS Markit

TOURISM IMPACT WASHINGTON, DC (DISTRICT OF COLUMBIA)

- Each Washington, DC visitor generates about **\$330 in expenditures**.
- Every **304 visitors creates a new job** in Washington, DC.
- Each visitor creates about **\$65** in tax receipts, **\$36 of which goes to local government**.
- Each visitor generates **\$184 in wages**.

Sources: IHS Markit; DK Shifflet; Travel Market Insights, National Travel & Tourism Office, U.S. Department of Commerce

CONVENTION FORECAST BOOKED BY DESTINATION DC

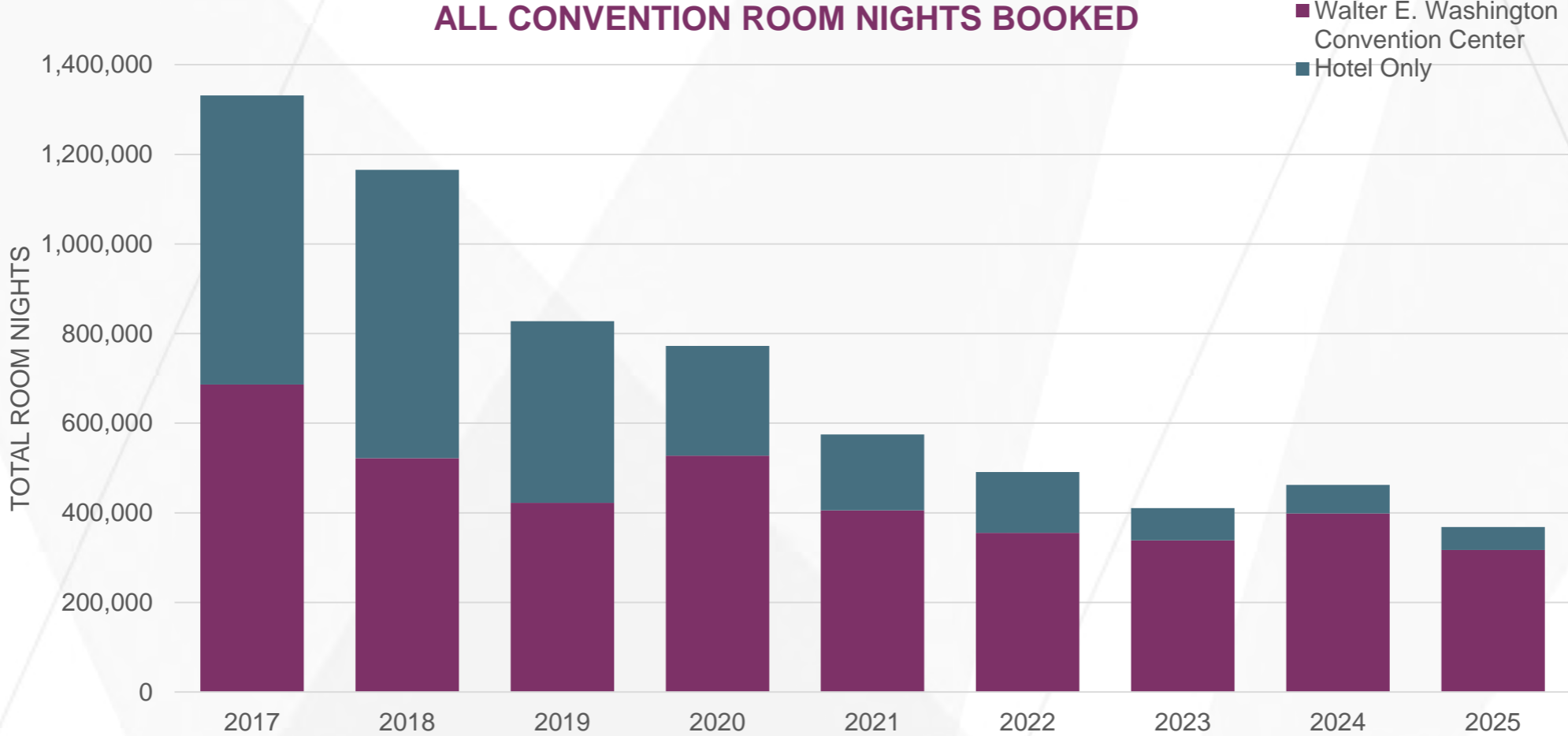


Chart reflects room nights confirmed as definite as of Sept. 18, 2018. Bookings are for calendar year.
Source: Destination DC

CITYWIDE FORECAST WASHINGTON, DC

ALL CITYWIDE CONVENTION ROOM NIGHTS BOOKED

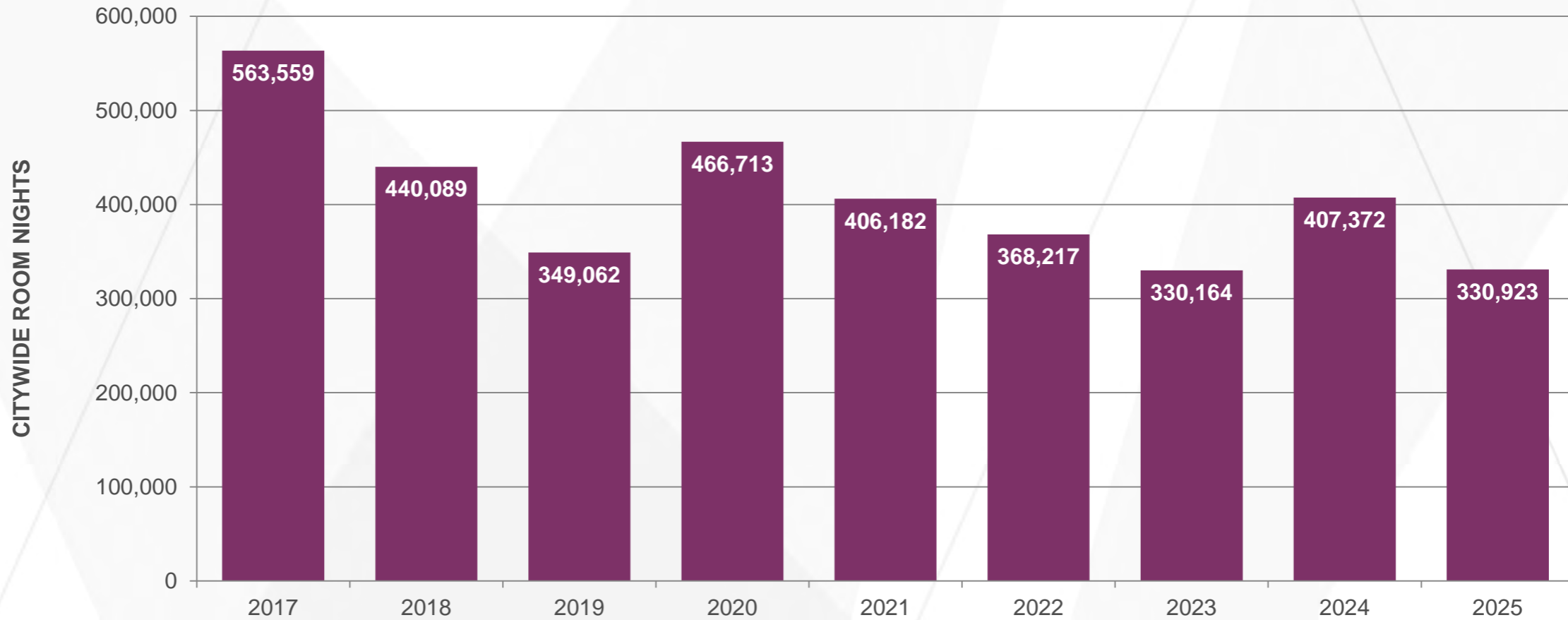
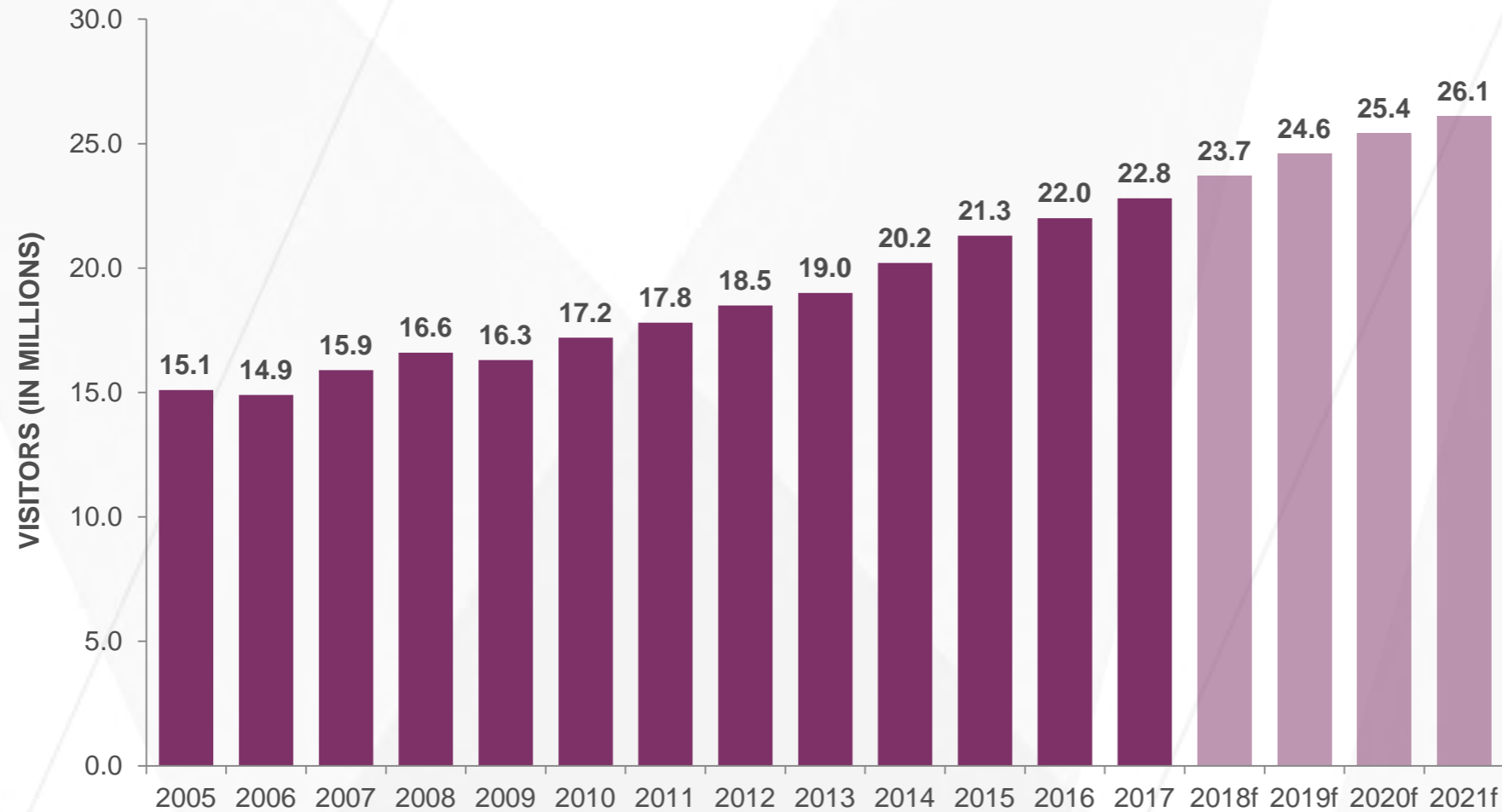


Chart reflects room nights confirmed as definite as of Sept. 18, 2018 for the calendar year; citywides are a minimum of 2,500 rooms on peak.

Source: Destination DC

VISITATION FORECAST THROUGH 2021

WASHINGTON, DC (DISTRICT OF COLUMBIA)



DC's total visitor volume in 2017 reached a record high and is expected to continue to increase by 3 to 3.5% each year through 2021.

Sources: IHS Markit; DK Shifflet; Travel Market Insights, National Travel & Tourism Office, U.S. Department of Commerce

METHODOLOGY

VISITOR VOLUME: DK SHIFFLET (DOMESTIC) AND TRAVEL MARKET INSIGHTS (OVERSEAS)

- Domestic data is collected using an online panel methodology, contacting more than 50,000 distinct U.S. households each month; data is weighted by key demographics to balance the sample to the U.S. population.
- Overseas data comes from the I-94 form for visitors to the U.S. and is supplemented by data from the Survey of International Air Travelers. The data is released by the U.S. Department of Commerce.

VISITOR FORECAST AND ECONOMIC IMPACT: IHS MARKIT

- Visitor volume data is combined with economic variables, DC tax collections and other tourism indicators like airport arrivals, transportation statistics and attractions attendance to calculate forecasts and economic impact.