



CITY TOURISM IMPACT

► AFFORDABLE TOURISM ECONOMIC ANALYSIS

The economic value of travel and tourism to America's cities is significant, yet not generally well understood. Now, cities and CVBs can answer critical questions asked by industry, the press, legislators, and other constituents regarding the importance of travel and tourism, such as:

- How many visitors did we host?
- How much did they spend?
- How much local tax revenue was generated?
- How many jobs and what amount of payroll was generated by tourism?
- How much of the tourism revenue stayed in the city?
- What was the total economic impact of domestic and international tourism?

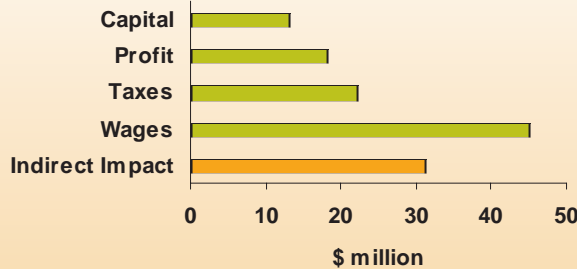
Credible answers to these vital questions are available through a one-of-a-kind offering called City Tourism Impact (CTI). Produced by two leading tourism industry experts, D.K. Shifflet & Associates, Ltd. (tourism marketing research), and Global Insight, Inc. (tourism economic analysis), CTI integrates D.K. Shifflet's primary travel industry data within Global Insight's annual economic impact analysis for U.S. cities.

In addition, a consistent approach across cities based on DKS&A inputs and Global Insight city-level economic analysis allows for valuable cross-city analysis and comparisons.

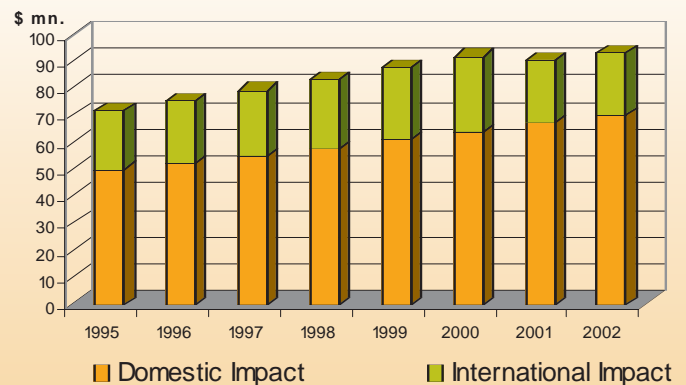
Avg. Daily Visitor Expenditure Data (mn.)

Total (+6.5%)	\$90.6
Transportation (+10.9%)	\$21.3
Food (+5.1%)	\$20.8
Room (+5.1%)	\$16.5
Shopping (+5.6%)	\$15.2
Entertainment (+4.8%)	\$13.0
Miscellaneous	\$3.8
Total Visitors	722,434

Detail of Economic Contributions



Size and Growth of Tourism Economy



The full economic impact is calculated from direct spending estimates based on visitor volume at the destination level from a representative sample of U.S. travelers from DKS&A's PERFORMANCE/MonitorSM to the destination (bottom up approach).

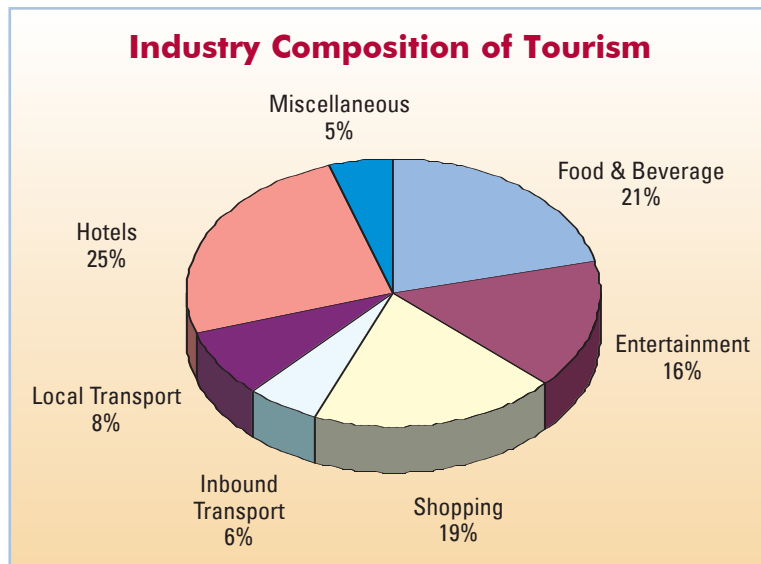
Additionally, International Traveler Impact is measured using modeled data from the OTTI, U.S. Dept of Commerce database, and current INS reports. Comprehensive analysis includes direct, indirect, and induced impacts.

Detailed data on sales and employment by industry provide a real world foundation that measures the diverse economic impact of tourism across various sectors. Accommodation, transportation, retail, entertainment, and attractions all play a role in the economic value of tourism. CTI identifies the individual industry composition of tourism across these diverse sectors in terms of jobs, payroll, and economic value.

▶ **ACCESSIBLE & ACTIONABLE INFORMATION FROM TWO TOURISM INDUSTRY EXPERTS**

CTI utilizes DKS&A's consumer based tourism market data as input to Global Insight's proven econometric impact models for U.S. cities, which provides an accurate, comprehensive, and flexible resource to planners and policy makers to:

- Assess the total economic impact of domestic and international tourism at the city-level
- Evaluate the impact of tourism on the city economy, relative to other major industry sectors within that same city
- Conduct cross-city tourism economic impact analyses and comparisons
- More accurately gauge the performance-level of tourism assets, programs, initiatives, and promotional campaigns
- Determine the feasibility of future tourism projects based on current and historical performance factors



Business Services	13,244
Financial Services	10,897
Tourism	8,298
Manufacturing	8,190
Construction	5,322
Real Estate	5,189
Insurance	4,771
Local Government	4,291
Health Services	4,075
Retail Trade	3,132

▶ **A SINGLE DATA SOURCE AT AN AFFORDABLE PRICE**

City governments and travel bureaus must currently contract with separate providers for primary tourism data and for economic impact analysis. Multiple contracts can be time consuming and expensive. By joining forces to create CTI, D.K. Shifflet & Associates and Global Insight have created a single source for visitor volumes and economic impact analysis, which provides cities with detailed, actionable information at an affordable cost.

FOR MORE INFORMATION ON CITY TOURISM IMPACT, PLEASE CONTACT:

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