

# Washington Dulles International Airport



## Market Overview

- Washington, DC is the political axis of the U.S.
- Washington, DC metropolitan area is the 8th largest DMA in the country
- DC generated \$6 billion in tourism in 2011, representing growth of 6%
- In 2010, DC saw over 15 million domestic visitors, and 1.7 million international
- One of the largest convention destination cities in the country
- The DC metro area is home to many important law firms, broadcasting networks, independent contractors, nonprofit organizations, lobbying firms, national associations of labor and professional groups
- World headquarters for Marriott, Amtrak, ExxonMobil, and International Monetary Fund

## Airport Overview

- 83 nonstop U.S. destinations; 49 nonstop international
- 34 carriers, including United, American, Delta, JetBlue, British Airways, KLM, Virgin Atlantic, Lufthansa, Emirates, Etihad and Saudi Arabian Airlines
- Newly expanded International Arrivals Building was completed in 2011, doubling its total floor space to accommodate IAD's 6.5 million international passengers a year
- IAD is part of the fastest growing air market in the nation (Washington, DC / Baltimore)
- Dulles (IAD) is located 30 minutes from downtown DC, serving millions of annual tourists and key players in global politics and Fortune 500 companies

## Fast Facts

2011 total passengers	23,211,856
Average monthly passengers	1,934,321
% Domestic travelers	74%
% International travelers	26%
% Business passengers	46%
Total number of terminals	7
Total number of airlines	33

Source: Washington-Dulles International Airport

## Travelers' Demographic and Lifestyle Summary

Average Household Income	\$134,592
Average Age	44
Average market value of owned home	\$505,507

## Market Penetration

57% of adults in the Washington, D.C. DMA traveled by air in the past year; of these adults, 60% departed from Dulles International Airport.

## Residence of Air Travelers by County

Fairfax, VA	24%
Montgomery, MD	18%
Loudoun, VA	9%
District of Columbia	9%
Prince William, VA	8%
Prince George's, MD	7%
Other counties (VA, MD, WV)	25%



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Advertising at Dulles International Airport reaches the most desirable audience of the Washington, D.C., DMA; they are highly educated, affluent individuals with active lifestyles, and they influence major purchasing decisions for the home and business.

## Profile of all IAD Travelers

### Traveler Purchasing and Lifestyle Highlights

Dulles International Airport travelers are very affluent; they spend more money on automobiles, entertainment, fashion and cosmetic products than most adults in the Washington, D.C., DMA.

#### Automotive

- Dulles travelers represent a potential of over \$6 billion in new vehicle sales in 2012
- They account for 76% of all the households in the Washington, D.C., DMA planning to pay \$45,000+ for a new vehicle in the next year

	Index
New car owned is an Acura	180
New car owned is a BMW	169
New car owned is an Mercedes	163
New car owned is a Jeep	157
New car owned is a Lexus	157

#### Apparel (yr)

	Index
Spent \$500+ on men's business clothing	187
Spent \$500+ on women's shoes	168
Spent \$500+ on women's	155

#### Business clothing

Spent \$500+ on men's shoes	150
Spent \$500+ on women's casual clothing	149

#### Jewelry

- Dulles travelers spend an average of \$450 on jewelry each year
- They are nearly two times more likely to spend \$500 or more on costume jewelry than the average adult in the Washington D.C. DMA

#### Health & Beauty

- 42% of all adults in the Washington D.C. DMA who have used a dermatologist in the past year travel through IAD annually.
- 72% of female travelers bought perfume, cosmetics and skin care products in the last year
- They are over three times more likely to have used any weight loss program in the last three years than the average female adult in this market

#### Recreation/Entertainment (yr)

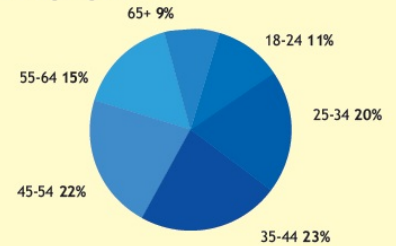
	Index
Visited Universal Studios, LA	186
Visited Times Square	167
Visited an art museum	162
Attended a Georgetown University Basketball game	143
Attended a symphony	143
Attended a boat show	134

- 46% of all adults in the Washington D.C. DMA who have been on a cruise in the past 3 years depart from IAD annually.
- IAD air travelers are 42% more likely to attend the movies at least once per month than the average adults in the Washington D.C. DMA.
- 43% of all adults in the Washington D.C. DMA who ate at a sit down restaurant 5+ times per month travel through IAD annually.

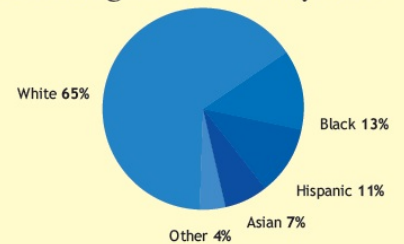
Male 53% Female 47%

#### Percentage of Travelers by Age

Average Age: 44



#### Percentage of Travelers by Race



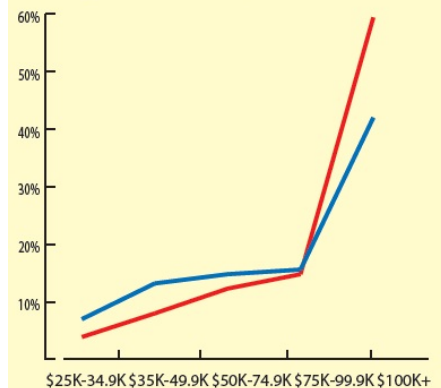
#### Education

	Index
Post Graduate degree	158
College Graduate or more	142

#### Household Income

All IAD Travelers (Average HHI: \$134,592) —

Washington, D.C., DMA  
(Average HHI: \$104,933) —



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## Traveler purchasing and Lifestyle Highlights

Advertising at IAD reaches top managers and business decision makers in the Washington, D.C., market.

Corporate Purchasing (yr)	Index	Internet Purchases (yr)	Index
Business travel/convention arrangements	326	Cultural event tickets	233
Overnight delivery services	250	Spent \$2,500+	231
Information technology	191	Airline tickets	211
Banking or financial services	187	Sporting event tickets	208
Computer hardware/software	178	Travel arrangements	202
Office equipment/office supplies	154	Consumer electronics	198
		Sports logo apparel	190
		Wine	188
		<ul style="list-style-type: none"> <li>Dulles business travelers spent an average of \$1,346 on internet purchases in the last year</li> </ul>	
Financial	Index	Leisure/Activity (yr)	Index
Individual employment income is \$250,000+	360	Sail boating	219
Used online investing/stock trading (yr)	211	Skiing	217
Has \$1,000,000+ in non-real estate investments	208	Tennis	198
Market value of owned home is \$1,999,999+	189	Golf	182
Used a full-service stockbroker (yr)	159	Hiking	169
Used an accountant (yr)	145	Yoga/palates	143
Has second home/real estate property	138	Swimming	141
		<ul style="list-style-type: none"> <li>58% attended a professional sporting event in the last year; 35% attended a Washington Nationals baseball game while 16% attended a Washington Redskins football game</li> <li>The average number of professional sporting events they have attended in the last year is as follows: MLB game, 3; NFL game, 3; NHL game, 3; NBA game, 3</li> </ul>	
Technology/Electronics (yr)	Index	Credit Cards	
Use phone for stock market	245	<ul style="list-style-type: none"> <li>93% regularly charge their credit card</li> <li>The top choice of credit card payment among IAD business travelers is VISA Gold/Platinum at 37% share, followed by MasterCard Gold Platinum at 26%</li> <li>They are 2 times more likely to use an American Express Platinum card than the average adult in the Washington, D.C., DMA</li> </ul>	
Spent \$3,000+ on television	245		
Use phone for sports scores	176		
Use phone for email	170		
Plans to buy a Smartphone	147		
Use phone for banking	135		
<ul style="list-style-type: none"> <li>73% of IAD business travelers use their handheld for texting, while 58% own a Smartphone</li> <li>IAD business travelers collectively spend \$2,717 on electronics annually.</li> </ul>			

Male 63% Female 37%

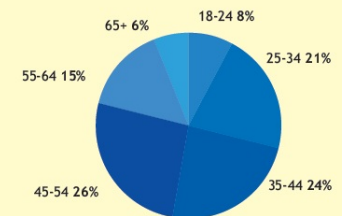
### Employment Characteristics

Percentage of professionals, by title, flying in the Washington, D.C., DMA who depart from IAD

General Manager	86%
Vice-President	73%
President	72%
Owner/Partner	61%
CEO	41%

### Percentage of Travelers by Age

Average Age: 44



### Household Income

All IAD Business Travelers  
(Average HHI: \$148,795) —  
Washington, D.C., DMA  
(Average HHI: \$104,933)—

