

**MARKET ANALYSIS FOR A HOTEL AND CONFERENCE CENTER
MUSEUM OF THE UNITED STATES MARINE CORPS, TRIANGLE VIRGINIA**

Prepared for:

US Marine Corps Heritage Foundation

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Executive Summary

The National Museum of the Marine Corps (NMMC) located near Exit 150 from I-95 in Triangle Virginia has a site plan that can accommodate a hotel and conference center and related parking. This study tests the market for the concept of a 200-room high-quality hotel with conference and meeting space to support the needs of Marine Corps Base Quantico (MCBQ) as well as business and leisure travelers.

The region around the NMMC is growing rapidly, due to the dynamics of the Washington area, and specifically the ongoing expansion of missions and employment at MCBQ brought on by the 2005 BRAC recommendations.

Demand for hotel rooms is driven largely by government-related business, accommodating overflow requirements from routine operations at MCBQ as well as special events held in nearby meeting spaces. Direct government business is constrained in price rather than quantity of demand – GSA’s published per diem and meals & incidentals rates for Prince William County, Stafford County, and Fredericksburg are considerably lower than for the Washington Metropolitan area.

A second significant market for hotel rooms is the segment related to military reunions, promotion ceremonies, visiting dignitaries, and other government-related business that may not be subject to per diem restrictions.

Leisure travelers will also demand hotel rooms near the NMMC, but the proposed hotel would face competition from numerous highway-oriented hotels along I-95.

Local hotels are characterized as mid-range, two-to-three story buildings averaging 100 rooms, and not including meeting space beyond perhaps one function room for fewer than 50 people. Larger hotels with amenities and services for guest and with more ample meeting space tend to be located in portions of Fairfax County, in Arlington County or Alexandria City, or in the District of Columbia, closer to airports or Federal agencies. Prince William County is eager for a hotel and conference center that allows it to compete for a greater variety of business within the hospitality industry.

Currently, the hotel occupancy rate in the I-95/Fredericksburg region is lower than for the US as a whole, and considerably lower than for the Tysons Corner area or Arlington. This is not entirely due to lack of demand, but also to the lack of variety in hotel facilities in the region. US-wide, the highest occupancy rates are being achieved in the luxury, upscale, and upper upscale segments, while the region predominantly has hotels in lesser scale categories.

A large portion of the demand for conference and meeting facilities comes again from the Government sector, particularly overflow demand from the Marine Corps University, and from other agencies located on or near MCBQ, including the FBI Academy, Drug Enforcement Administration Training Center, and in the future, the Defense intelligence agencies locating near Boswell’s Corner in Stafford County.

Private sector demand for meeting space is currently limited, as large employers or employers sponsoring medium to large conferences are few in number. Competing facilities are currently in the planning stages in Prince William and Fairfax Counties and in Fredericksburg, and there is an ample supply of hotels with conference space or dedicated conference centers in Northern Virginia, Washington DC, and suburban Maryland. However, the proposed facility could attract private sector

demand in the form of weddings, graduations, and other ceremonies, or from Defense contractors or companies attempting to sell to Federal agencies.

Conclusions and Recommendations

A hotel and conference facility at the National Museum of the Marine Corps would benefit from a prestigious location, support from the Prince William County government, a head start on potential competition, a relative absence of existing direct competition, and a large potential for Government-related conference and overnight business.

Several factors weigh against a large or luxury hotel: the site is distant from activity centers and generators of tourism (other than the Museum itself); the area is generally not seen as a meetings location by the private sector; occupancy rates in the primary trade area are low; and existing hotels have been engaged in a price competition, lowering rate expectations.

There is a market for a hotel and conference center at the NMMC in Triangle, Virginia. Market support includes the following facilities:

- 180-220 room mid-range hotel
- 140-room extended stay hotel
- 80-100 room boutique upper upscale hotel
- 15-20,000 square feet of conference and meeting space
- On site-white tablecloth restaurant

A key priority would be to petition GSA for a waiver of the allowable per diem in Prince William County, or a recalculation for this specific location. The financial viability of an upscale hotel and conference center depends on being able to have a higher average daily rate and higher Revenue per Available Room (RevPar) than would occur through majority government-related business at currently allowable per diem and meals & incidental expenses rates. A financial feasibility analysis is recommended.

SECTION 1: SITE LOCATION AND LOCAL DYNAMICS

Background and Purpose

The Marine Corps Heritage Foundation has developed the very successful Museum of the United States Marine Corps and Heritage Center (NMMC) on a well-located site in Prince William County, at Exit 150 from I-95 and also accessible from US Route 1. The site is highly visible to northbound traffic on I-95 due to the strength and distinctiveness of the museum's dominant architectural feature, the stainless steel mast that serves as icon and signpost. The Museum attracts more than 500,000 visitors a year. The Museum includes exhibition galleries, two restaurants, a theater, a gift shop, and outdoor parade ground. Additional galleries are being deployed in phases.

Recently, a chapel and a trail network through Memorial Park were added to the grounds, as delineated in the full-development site plan. Future additions include a 350-seat theater, artifact restoration building, classrooms, additional exhibit areas, and a lunchroom for children.

Integral to the Museum's long-range master plan is the development of a hotel and conference center on the site, on ten acres reserved for that purpose. This facility responds in part to the current demand already generated on Marine Corps Base Quantico (MCBQ) by a number of government agencies and the Marine Corps itself.

This study analyses the market potential for a hotel and conference center in order to determine the size, quality level, and features of a hotel and conference center on the site.

The Museum's master development plan is shown below.



Exhibit 1: Master Plan for National Museum of the Marine Corps

Surrounding Area

The Museum is adjacent to the Marine Corps Base Quantico, a large facility straddling Prince William and Stafford Counties in Virginia. Until recently, the area was somewhat removed from the sphere of influence of the Washington metropolitan area, being over one hour's travel time from downtown Washington or the Pentagon.

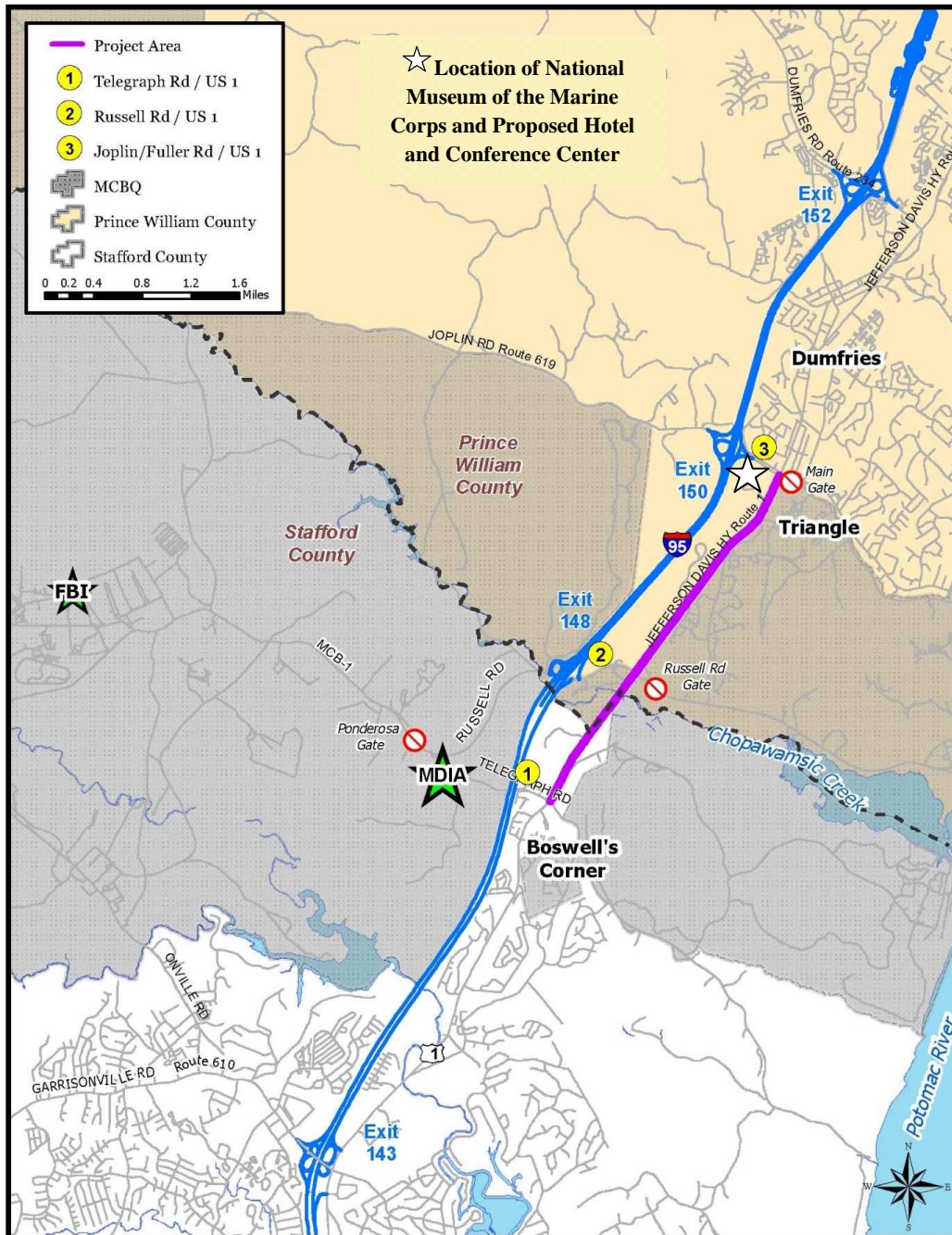


Exhibit 2: Site location and transportation

A cluster of government agencies has co-located on or near the Base. These include the FBI Academy and the DEA Training activities located nearby to take advantage of space and seclusion.

With the announcement in 2005 of a BRAC movement to Quantico of 2,700 employees, the area has embarked on a growth path: in addition to construction on base, surrounding counties have experienced the construction of new office buildings; much of the new private-sector space will house government contractor firms. Some of the new construction is outlined in Appendix Table 1.

Prince William County's population grew by 43.2% from 2000 to 2010, reaching 402,000 people. Spotsylvania County and Fredericksburg grew 35.4% to 122,400 in the same period. Stafford County grew to 135,800.

Prince William County has given emphasis to redevelopment and revitalization of Route 1 between Triangle (just north of the Museum) and Woodbridge. Although a number of private sector residential and mixed use projects stalled in the past two years due to prevailing the economic and financing situation, they are likely to revive in the near future. Overall, eastern Prince William County is likely to experience continued growth in office, residential, retail, and hotel uses.

Stafford County's growth is at the northern end, close to MCBQ. The Silver Companies have developed Quantico Corporate Center near the south gate of the base, about one-half mile from the new 719,000 square foot MDIA facility. The center is a multi-phase complex that could reach 1.4 million square feet at completion. Currently two Class A office buildings totaling 280,000 square feet have been built, and a third building was announced in February 2011. Stafford County just approved a redevelopment plan for four areas of the County that will be incorporated into the Comprehensive Plan. The northernmost of the four areas is Boswell's Corner, adjacent to MCBQ. The redevelopment plan envisions a more urban development pattern, with a grid street system and shops, offices, and restaurants in a mixed use configuration.

The Fredericksburg region has been growing rapidly since 2000, as people moved south from Northern Virginia for less expensive housing. Residents are still commuting north for work, but the BRAC movements toward Ft. Belvoir and Quantico, and their associated contractor force, will help provide new jobs in the Fredericksburg area, spurring growth in demand for office space.

Employment and Job Growth

Prince William County had at-place employment of 104,830 in 2010, and Stafford County had 36,121 jobs. Prince William County added 1,700 jobs in 2010. The Fredericksburg region averaged 3.5% annualized employment growth from 1998 to 2008. Health care and education are major growth sectors. From 2001 to 2010, Stafford County averaged a 4.0% annualized job growth, and continued rapid growth is anticipated for 2011 and 2012. The fastest growing sectors were 1) computer systems design and related services, and 2) architectural and engineering services. Professional and business services are anticipated to grow by 5.0% per year through 2020.

Table 1.1 provides indicators of growth in jobs and construction in Prince William and Stafford Counties and Fredericksburg.

Table 1.1. Regional Indicators

	Prince William Co	Stafford Co.	Fredericksburg	Total
Population				
2000	280,213	92,446	19,279	391,938
2010	401,323	135,806	22,239	559,368
2020	515,235	176,710	25,116	717,061
Jobs				
2010	104,740	36,121	25,015	165,876
Commuting 2000				
Live and Work	50,435	14,088	4,065	
Commute in	35,360	12,976	15,698	
Commute out	99,906	34,268	5,586	
Net out-commute	64,546	21,292	(10,112)	

Source: Data compiled by Virginia Employment Commission

Marine Corps Base Quantico

The base is located about 35 miles south of Washington DC. Multiple agencies are housed on the base, including:

- US Marine Corps
 - Marine Corps Intelligence Activity
 - Headquarters and Service Battalion
 - Marine Officer Candidate School
 - Training and Education Command
 - Combat Development Command
- FBI
 - Training Academy
 - Forensic Laboratory
- Drug Enforcement Administration
 - Training Academy

In September 2011, the Military Defense Investigative Agencies will have relocated to MCBQ with 2,767 employees. Component agencies include:

- Defense Security Service
- Defense Intelligence Agency
- Naval Criminal Investigative Agency
- Army Criminal Investigation Command
- Air Force Office of Special Investigations

SECTION 2: DEMAND FOR HOTEL ROOMS

The area around the Marine Corps Museum is currently a different hotel market than in the Washington Metropolitan area in general, which itself has many hotel submarkets. A key differentiator is that the GSA specifies much higher allowable per diem rates in the Washington market than in the Prince William and Stafford market. The hotels present in the Prince William and Stafford/Fredericksburg market are also of a different character and appeal to a different audience than hotels found in locations closer to downtown Washington.

Due to travel distances, traffic, and differences in generators of demand for hotel rooms, hotels located in the vicinity of the Marine Corps Museum attract more leisure travelers than business travelers. Until recently, leisure demand has been based on the needs of through travelers on I-95, shoppers attracted to Potomac Mills mall, and visitors to local historic attractions; business demand has been based more on the needs of government-related business (direct Marine Corps or MCBQ related business) than on corporate or association demand.

The trade area for a hotel at the Marine Corps Museum can be broken down into two parts:

- Primary Trade Area, which includes the area south of the Occoquan River in Prince William County and the northern portion of Stafford County, focused on the I-95 corridor
- Secondary Trade Area, including the Washington region and through traffic from other states.

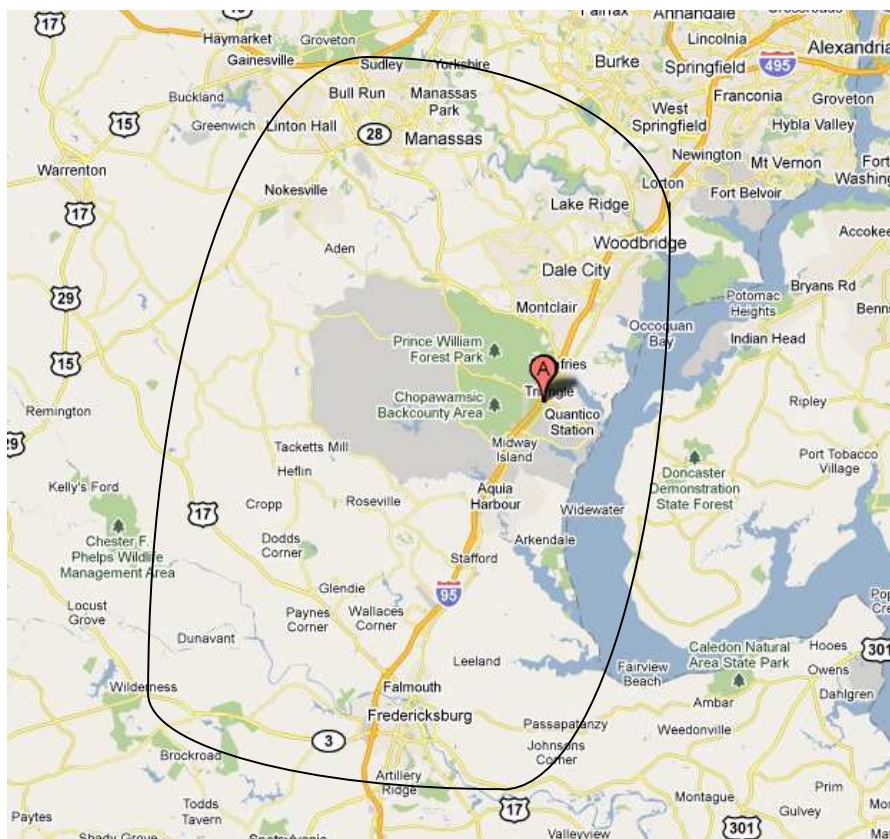


Exhibit 3: Primary Trade Area

Market Segments Comprising Demand for Hotel Rooms

Demand for hotel rooms was analyzed by major market segment, as the characteristics and needs of each segment are different. Included in this analysis are:

- Government-related
- Corporate
- Association
- Education
- Leisure
- Personal

The following analysis considers demand for hotel rooms not associated with meetings.

Government-Related

This substantial market segment draws from the activities currently housed on MCBQ as well as the ongoing expansion due to BRAC and future expansions. Each agency on the base generates demand on its own. The current demand cannot be accommodated within existing facilities nearby, and overflows to hotels in Fredericksburg, or in the case of conferences, to larger hotels in Arlington, Washington, DC, Fairfax, and other parts of the Washington area (Appendix Table 9)

The FBI Training Academy is located on 385 acres on base and has been opened since 1972. It is a secured facility that provides a variety of training, including a 20-week new agent training course graduating 800 agents a year. Its current campus includes a classroom building, dining hall, library, three dormitory buildings, a gym and track, administrative offices, and 8 outdoor ranges. The FBI Academy has outgrown its facilities and has identified a need for 650 new beds, 12 classrooms, and a 700-seat conference center; these new facilities, when built, are purported to save the agency \$15.2 million that is currently spent housing trainees off-campus. If the new facility is not built, there continues to be a demand for hotel rooms for trainees. If it is built, it is likely there would still be demand for off-site hotel rooms for visiting instructors or high-level government officials visiting the site.

The Drug Enforcement Administration operates a Training Academy at Quantico which conducts such activities as Basic Agent training, Firearms training, Intelligence training, and executive and professional development programs.

The Marine Corps University conducts conferences, classes, and ceremonies on Base, many at the Gray Research Center. In 2010, the MCU held 790 conferences and 259 classes. Multiple commands use the facility. These conferences and classes could be expected to generate demand at off-site hotels.

The Military Defense Investigative Agencies (MDIA) is relocating to MCBQ by September 15, 2011. The new facility provides 58 conference rooms and 10 classrooms on a 100 acre secure compound. The buildings are ATEP compliant and LEED Silver. A fitness center and cafeteria are available. It is likely that their conference and meeting space needs will be met internally for the first few years, but there could be hotel business related to visiting instructors and related users.

Contractors on government business will need hotel rooms in the vicinity of the base.

While there is significant demand for hotel rooms directly related to government business, this type of business has some constraints associated with it. A key issue is the Government Per Diem rate and Meals & Incidental Expenses reimbursement specified for Prince William County. Also of concern is the tendency of government business to be strong only on Monday, Tuesday, and Wednesday nights, meaning that a hotel needs to balance its book of business with other types of users to ensure it can fill late week and weekend nights. Finally, government-related business tends to not book in advance, posing a challenge to the hotel's management in filling space.

Corporate Demand

Business travelers tend to pay higher rates than government or leisure travelers, and demand more amenities, better-appointed accommodations, and more services than other categories. They are also more likely to eat breakfast or dinner at the hotel restaurant than other types of overnight guests.

Corporate travelers who may have an interest in staying at a hotel near the Marine Corps Base include employees of companies marketing to agencies and commands on the base. There are several annual opportunities, for example in conjunction with the Marine Corps Expo (an annual event coming up next in September 2011), as well as one-time only marketing trips by individual companies. The single-purpose trip demand is reduced somewhat by the extensive presence in the Washington area of contractors firms that have local offices in the metropolitan area; they may be sending locally-based employees on marketing missions rather than flying people in from around the country. In addition, some employees flying in from outside the region will likely choose to stay overnight at a hotel closer to Dulles or Reagan National Airports, or close to another destination in the Washington area such as the Pentagon or Capitol Hill. Nevertheless, a portion of the demand for a new hotel at the Marine Corps Museum would arise from corporate travelers with business on the base.

Another portion of corporate hotel demand comes from businesses located in Prince William and Stafford Counties, whose suppliers from other parts of the country need to visit with them. Prince William and Stafford Counties' employer base is still small, and the companies located there tend to be government contractors or small firms. Appendix Table 3 provides a sample listing of employers with over 100 employees in Prince William and Stafford Counties.

Associations

Associations generate an enormous amount of business in the Washington metropolitan region. Hundreds of trade and professional associations are based in the Washington area, and many hold several meetings in the area, although their large Annual Meeting may be held in a different city each year. Outside of their meetings that require an overnight stay, associations sponsor numerous smaller meetings, including Board meetings, seminars, and one-day conferences that may require a few of the attendees to spend one night at a hotel.

The Marine Corps Museum's location far from the concentration of association offices or downtown Washington lobbying sites weighs against a role in providing hotel rooms to association executives or board members. There is some possibility of associations with a connection to the military to want overnight rooms.

Educational

Specialized training and continuing education course generated demand for hotel rooms particularly tied to meeting space, and will be covered in the section on meetings.

Leisure Travel

A substantial portion of the existing business at hotels in Prince William County and Stafford County is generated by leisure travelers. These include the following segments:

- People on group tours, usually characterized by arrival on a tour bus, and a low room rate;
- Family or high school outings staying overnight; these also tend to seek lower-priced accommodations;
- People driving along I-95 on the way to a more distant destination and spontaneously choosing a hotel when they are ready to stop for the night; these tend to choose brand name highway hotels with \$50 to \$80 room rates or lower;
- Travelers on a holiday with a specific theme such as discovering Civil War or Colonial History, or museum-goers, or people interested in Military themes – this segment is interested in more comfortable overnight accommodations, may enjoy a white-tablecloth restaurant for dinner, and may be willing to pay more for their room than the typical highway traveler; Washington area attractions that bring tourists to the area are identified in Appendix table 11.
- Attendees at special events in the vicinity; these may consider staying at a hotel at the Marine Corps Museum, particularly if the special event they are attending is at the Museum or nearby. This segment may be willing to pay more for a room than those seeking a standard highway hotel or motel;
- People gathering for a sporting event such as the Marine Corps Half Marathon. This year the Road Runners Club of America is having its 53rd annual convention at the Courtyard Marriott in Fredericksburg, with 225 attendees expected.
- Social travelers are those who are part of a wedding, graduation, class reunion, special ceremony. They are also a potential market for a hotel at the Marine Corps Museum, particularly when the ceremony or reunion is being held on MCBQ or at the Museum.

Leisure travelers thus run the gamut from those spontaneously seeking an inexpensive overnight accommodation to those who are clearly interested in a high quality overnight stay.

Table 2.1 Stand-alone Hotel Room Demand by Market Segment

Segment	Typical Length of Stay	Days of the Week	Seasons	Price Sensitivity	Prospect
Government	2-3 days	M-T-W	year-round	high (govt per diem)	High
Corporate	2-3 days	S-M-T-W-Th	year-round	low	Low to medium
Association	1-2 days	M-T-W-Th	F W Sp	low	low
Education	1-2 days	M-T-W-Th	F W Sp	medium	low
Leisure					
group travel	1 night	any	Sp Su	high	low
family/school	1 night	M T W Th	Sp Su	high	low
Drive-by	1 night	any	all	high	medium
Museum visitor	1 night	any	Sp Su	medium	Medium to high
Special event attendees	1-2 nights	Th F S	any	medium	high
Ceremony attendees	1-2 nights	Th F S	Fall, Sp, Su	medium	high

Room Night Potential of These Segments

Total demand is dependent on season, length of stay, other attractions in the area that cause people to pick a specific location, and price sensitivity. Net demand is made up of accommodated room-night demand plus usable latent demand. As shown in the next section, occupancy is middling in hotels along the I-95 corridor, indicating that the available rooms do not match the needs of the government, business, and leisure traveler.

At the occupancy rates achieved State-wide in 2009 and 2010 (average of 55%), a 140-room hotel would have to fill 28,105 room-nights each year, while a 240-room hotel would need to fill 48,180 room-nights. At the 67.2% occupancy rate achieved in Fairfax County in 2010 these numbers would increase to 34,339 in a 140-room hotel and 58,867 in a 240-room hotel.

The best prospects to stay at the proposed hotel are overnight guests on government business, most likely staying 3 to 5 nights, and in some cases potentially 21 nights; and museum visitors, and event and ceremony attendees staying 1 to 2 nights. These overnight guests will be supplemented by guests deriving from conference and meeting attendees.

To serve these overnight guests, the facility should provide a full-service restaurant, room service, and a breakfast restaurant; workout/fitness facilities; walking/jogging trails; laundry and cleaning service; and easy access to parking.

SECTION 3: SUPPLY OF COMPETING HOTELS

The competition for a hotel and restaurant facility at the Marine Corps Museum consists of existing and planned hotels and restaurants in a primary trade area from the Prince William County border with Fairfax County and northern Stafford County to the south, and from the Potomac River to Gainesville on the west, as shown in the Trade Area map above; and of Northern Virginia and the greater Washington metropolitan area.

Existing Hotels

Existing hotels tend to be in the upper midscale, midscale, and economy categories according to Smith Travel Research’s definitions. They have traditionally served as highway-oriented hotels catering to through travelers or to visitors to the area’s historic attractions. Few would be considered business hotels and almost none as conference hotels. Table 3.1 summarizes the hotels present in eastern Prince William County, northern Stafford County, and Fredericksburg by their “scale” according to Smith Travel Research. Appendix Table 5 provides a sample of hotel brands within each scale.

**Table 3.1 Number of Hotels by STR US Chain Scales
Prince William and Stafford Counties and Fredericksburg**

Scale	Number of Hotels		
	Eastern Prince William Co.	North Stafford & Fredericksburg	Total
Luxury	0	0	0
Upper Upscale	0	0	0
Upscale	4	3	7
Upper Midscale	5	8	13
Midscale	5	5	10
Economy	6	5	11
	20	21	41

Source: Field research

Prince William County offers 3,919 rooms county-wide, while Stafford provides an additional 1,261, and Fredericksburg city 1,425. Of the total, about 3,000 would be considered to be in the same trade area as the proposed NMMC hotel and conference center.

Within the 41 hotels in Prince William County, 8 are in the Quantico area, totaling 742 rooms; only two have meeting space. Half of the County’s hotel inventory is along the I-95 corridor, with the remainder around Manassas and the Manassas battlefield areas. Eleven of the 41 hotels have meeting space. The hotels tend to be small, with an average of 96 rooms per hotel.

Northern Stafford County has 9 hotels with a total of 703 rooms; only one has more than 100 rooms; seven have a small meeting room.

Southern Stafford includes Fredericksburg suburbs, and has 13 hotels for 1,070 rooms. Six have meeting space, and two have restaurants. Fredericksburg has 14 hotels with 1,404 rooms; thirteen of them have meeting space and four have restaurants. Fredericksburg serves several markets, including Quantico, Kings Dominion, historic Fredericksburg, the Fredericksburg Expo Center, and Mary Washington University.

**Table 3.2 Summary of Hotel Inventory
Prince William, Stafford, Fredericksburg**

Location	Number of Hotels	Number of Rooms	Average No. of Rooms	No. with Meeting Space	No. with Restaurant
Prince William - Woodbridge	13	1,193	92	6	1
Prince William - Quantico	8	742	93	2	2
N. Stafford	9	703	78	7	0
S. Stafford	13	1,070	82	6	2
Fredericksburg	14	1,404	100	13	4
TOTAL	57	5,112	90	34	9

Source: Field Research

Detailed hotel inventories can be found in appendix tables 6.a, 6.b, and 6.c.

Of the 57 existing hotels in the primary trade area, only nine have on-site restaurants and could be considered full-service hotels, although several more have restaurants within walking distance.



Photo 1: Comfort Inn Dumfries



Photo 2: Holiday Inn Express Fredericksburg



Photo 3: Super 8 Stafford

In addition to these hotels, there is one facility on the Marine Corps Base, the Crossroads Inn on Russell Road. It has 74 standard rooms, 4 king rooms, 42 efficiencies, and 24 suites. It advertises an overnight rate for standard rooms of \$73 for military guests and \$81 for FBI/DEA/Government Contractor overnight guests. On Ft. Belvoir, lodging is available for \$80 to \$105 per night.

Planned Hotels

Prince William County

Several hotels have been talked about in the Potomac Mills area but their status is uncertain. They would most likely be of the type already abundant in Prince William County, hotels for the leisure traveler that are highway- or Potomac Mills- oriented.

The Harbor Station Mixed-use development has the potential for a full-service riverfront hotel with conference space. Harbor Station is currently on hold due to reverses suffered by its developer, but will likely take off in the future. Harbor Station is also planned to include a national defense campus, a riverfront town center, and marina. It is located at I-95 and Rt. 234, one exit north of the NMMC.

A site plan has been approved for a hotel across Rt. 1 from the Quantico Gateway development.

Further west at Innovation Technology Park, two hotels have been announced, one extended stay and the second a full-service hotel in the planned Innovation Town Center.

Stafford County

The newly-adopted Master Redevelopment Plan for Boswell's Corner at Jefferson Davis Highway and Telegraph Road in Stafford, near the south gate of MCBQ, allows for 219 new hotel rooms.

Fredericksburg

Kalahari Resorts, an African-themed resort and water park, is slated to invest \$200 million in Fredericksburg next to the Expo and Conference Center at Celebrate Virginia. The resort is planned to include 700 guest rooms and 100,000 square feet of conference and event space. Additional crowd-pleasing features are a 125,000 square foot water park, minigolf, bowling, go-carts and a game room.

With the addition of these planned hotels, there is still little in the way of full-service hotels with meaningful meeting space and an on-site white tablecloth restaurant.

Performance of Existing Hotels in Prince William and Stafford Counties

Hotels nationally and in the Washington region suffered on all major indicators in 2009 and 2010; a recovery is taking place in 2011 and is expected to continue improving hotel performance. Prince William County hotels were lower in occupancy, Average Daily Rate, and RevPar than hotels in the Washington Metropolitan Area as a whole. Table 3.3 details key indicators for lodging in Virginia, the Washington Metropolitan Area, Arlington, Tysons Corner, and the I-95/Fredericksburg corridor.

Table 3.3 Lodging Data for 2010: Virginia, Washington Area, and Subareas

Location	ADR 2010	ADR 2009	Occupancy 2010 (%)	Occupancy 2009 (%)	Room Supply Growth (%)	Room Demand Growth (%)
Virginia (State)	\$ 96.49	\$ 98.15	56.4	54.5	2.5	6.0
Washington Area	\$ 143.39	\$ 145.22	67.0	64.6	2.9	6.8
Arlington	\$ 163.69	\$ 164.10	73.5	71.5	2.3	5.2
Fairfax/Tysons	\$ 124.12	\$ 128.05	67.2	63.8	2.4	7.8
I-95/Fredericksbg	\$ 78.74	\$ 78.02	57.4	56.6	3.3	4.7
US May 2011	\$ 101.14		62.8			

Supply = change in number of rooms available
 Demand = change in the number of rooms sold

Source: Virginia Tourism Corporation and Smith Travel Research

Occupancy Rate

Hotels in the Washington area achieved a 64.6% occupancy rate in 2009 and 67.0% in 2010; In both years, the Washington Area occupancy rate was substantially higher than for the entire state of Virginia. Arlington’s occupancy rates were much higher than for the metropolitan area, while Alexandria’s and those of Fairfax County were generally comparable to the metropolitan average. The I-95 corridor including Fredericksburg was substantially below the Washington average in both years, achieving occupancy of 56.6% in 2009 and 57.4% in 2010. Prince William County’s 61.9% occupancy rate in 2009 dropped to 58.1% in 2010.

Occupancy rates have a seasonal pattern, with highs from April through August, and lows in December, January, and February. For example, in July 2010, Prince William County’s occupancy rate was 73.1%, while it was 41.9% in January 2010.

Average Daily Rate (ADR)

The Average Daily Rate data follow similar patterns to the Occupancy Rate data. The Washington Metropolitan area had much higher ADR than the state of Virginia. Within Virginia, Arlington achieved the highest ADR, followed by Alexandria, Fairfax/Tysons Corner, and Fairfax/Dulles Airport, in that order.

Prince William’s Average Daily Rate has been substantially below the average for the Washington Metropolitan Area, and is the reason that Prince William County’s GSA Per Diem is much lower than for the metro area. In 2009, Washington hotels achieved an ADR of \$145.22, while Prince William County hotels reached only \$92.21, and a further depressed \$85.79 in 2010. In conjunction with that, the allowable per diem for Prince William County dropped from 2009 to 2010, reaching its current level of \$89 for 2010. The Tysons Corner area had an ADR of \$124.12 in 2010, while Arlington achieved \$143.39.

Revenue per Available Room (RevPar)

Most critical in assessing hotel performance is the RevPar number, which accounts for all hotel revenue, not just the room rate. RevPar takes into account food and beverage charges, meeting room rentals, internet access fees, and miscellaneous other revenue sources. For Washington metro area hotels, RevPar was \$94.04 in 2009, compared to \$57.10 in 2009 for Prince William County. The current US average is \$63.50, not that much more than Prince William County's, indicating the extent to which the upscale and upper upscale hotels in Fairfax, Arlington, DC, and to some extent Montgomery County are able to charge higher room and food and beverage rates to customers wanting the convenience of a location close to regional airports, metrorail transportation, or proximity to Federal agencies or Capitol Hill.

GSA Per Diem

Currently, the GSA Allowable Per Diem rate in Prince William and Stafford Counties and the City of Fredericksburg is much lower than for the Washington metropolitan area. This lower per diem could constrain the ability of a new hotel to cater to customers on government business.

Table 3.4 GSA Allowable Per Diem and M&IE Rates, 2010

Location	Per Diem	M&IE
Prince William County	\$ 89	\$ 56
Manassas City	\$ 82	\$ 46
Stafford County	\$ 89	\$ 56
Fredericksburg & Spotsylvania Co	\$ 89	\$ 56
Arlington, Alexandria, Fairfax	\$157-211	\$ 71
Washington DC	\$157-211	\$ 71
Montgomery & Prince George's	\$157-211	\$ 71
Loudoun County	\$ 111	\$ 61
Warrenton	\$ 93	\$ 46
Standard Rate	\$ 77	\$ 46

M&IE: Meals and Incidental Expenses --

\$56 = \$9 breakfast, \$13 lunch, \$29 dinner, \$5 incidentals

Per diem rates use ADR data generated from April 2009 to March 2010 for Monday through Thursday travel as provided by Smith Travel Research to GSA

Allowable expenses for meals are also lower in Prince William County than for the Washington inner counties, \$56 per day versus \$71 per day, restricting achievable food and beverage sales.

SECTION 4. DEMAND FOR CONFERENCE FACILITIES

The Washington area has an abundant supply of meeting facilities, whether at hotels or at special venues. Alexandria, Arlington, and Fairfax periodically review their existing facilities and attempt to justify the construction of a conference or convention center. The Marine Corps Museum site is some distance from the existing facilities, and within an area whose hotels offer little beyond one or two meetings rooms each capable of accommodating 20-40 people. Only Fredericksburg within the primary trade area has facilities substantial enough to accommodate conferences. Demand is primarily fueled by the Marine Corps Base, rather than the corporate, association, or leisure segments.

Trade Area

The trade area for meetings and conferences at the Marine Corps Museum is limited to the area between Ft. Belvoir in Fairfax County and Fredericksburg. (See Exhibit 3)

Market Segments that would want to have a conference

As was the case for the standalone hotel room demand, several market segments with different characteristics account for the total demand for conference and meeting space. Primary among those is the government segment, followed by the social segment. Corporate, association, educational, religious, and leisure meetings account for smaller shares of total demand.

Government Meetings

These include Department of Defense (DoD) and civilian agency sponsors. Meetings in the DoD category include meetings currently held on MCBQ, as well as meetings that occur at large facilities in the Washington area such as the Expo Center in Fredericksburg, the Gaylord Hotel at National Harbor, and conference hotels in Arlington, Fairfax, and DC. Commands and agencies conducting meetings on and off the base at Quantico include:

- Marine Corps University
- Marine Corps Systems Command
- Training and Education Command
- FBI Academy
- Drug Enforcement Administration
- Department of Homeland Security

Table 7 in the Appendix provides a sample of meeting and conference activity associated with the Base.

The Annual Modern Day Marine Expo attracts several hundred vendors for three days in September. Vendors and exhibitors create high demand for hotel rooms during this period. In 2010, four hotels were recommended to attendees, the Fairfield Inn & Suites and Hampton Inn Woodbridge north of the base, and the Staybridge Suites Quantico and Wingate by Wyndham south of the base. Large expos of this type are generally better suited to a facility such as the Fredericksburg Expo Center, large open spaces filled with tents, or a conference center in the region.

The Marine Corps University provides accredited degree programs for Commissioned Officers. Its degree programs include the Marine Corps War College, Marine Corps Command and Staff College, and School of Advanced Warfighting. Other programs include the Expeditionary Warfare School, Enlisted Professional Military Education, and Marine Air-Ground Task Force Logistics.

Other commands on MCBQ also use conference and classroom facilities on and off-base. The Marine Corps Combat Development Command held 233 conferences in 2010, of which only 20 were held on base. The Capabilities Development Directorate held the most conferences off base, 146 in 2010.

The FBI Training Center conducts a variety of training activities, most of which had been accommodated within its on-base facility. The FBI now has identified a need for additional overnight facilities, classrooms, and training facilities.

The DEA's Office of Training conducts basic agent training, tactical and firearms training, intelligence training, and numerous other types of training at its Training Academy at Quantico.

The Department of Homeland Security has also been identified as needing conference, meeting, and training facilities in the vicinity of MCBQ.

New agencies moving to the base, including the MDIA will also have requirements for conference and meeting space. Undoubtedly much of that demand is initially accounted for in the new facilities being built to house those agencies; however, as time goes on, demand usually grows to the point where existing facilities are no longer sufficient, and demand will then be diverted to off-base facilities.

Additional Federal Agencies may be attracted to the Marine Corps Museum site by the presence of a secured facility. The Potomac Harbor (Kettler) project between MCBQ and Woodbridge certainly anticipates a need for secure office and meeting facilities in an area reserved for a secure campus.

Civilian agencies may also be attracted to the area for conferences, workshops, and training, although they will more likely choose locations closer to their agency or to public transportation.

Corporate Meetings

The Corporate meeting segment holds Executive meetings, corporate retreats, training, Board meetings, and sales meetings. Local businesses are likely to book the proposed facility for training, Board, and sales meetings; however, there are still not many local businesses of a size to need such meetings. Appendix Table 3 lists local major employers. The most lucrative corporate meetings, Executive Meetings and Corporate Retreats generally seek resort or waterfront locations with golf courses, watersports, multiple restaurants, and spa facilities, and are not likely a strong market segment for a hotel and conference facility at the Museum.

Association Meetings

Professional and trade associations hold large annual meetings, and smaller regional, state or topic-driven meetings. The Washington area has a large concentration of associations who help drive the demand for conference and meeting space in hotels throughout the region. National or annual meetings require very large facilities as well as tend to rotate among cities and be in a downtown

location with many amenities or close to a major airport. These characteristics indicate they are unlikely to seek a facility such as that envisioned for the Marine Corps Museum hotel and conference center.

Smaller association meetings could choose the Museum's facility, although that is somewhat unlikely also. Many prefer downtown locations or hotels near public transit. Unless they needed a secure facility for their meeting, they would prefer a location other than the Marine Corps Museum hotel.

Educational Meetings

Professional associations and school groups may book meeting space to conduct educational programs. Some examples include continuing education programs, licensing courses, and seminars on educational topics.

Small and Niche Meetings

A promising segment is the small and niche meetings segment. These meetings tend to be on a specific topic, such as Civil War history. These meetings typically last one to two days, result in overnight stays, and attract 50 to 100 attendees.

Reunions

Reunion meetings, particularly of Veterans groups or of specific commands or battalions of the Marine Corps, could be a fertile source of business for the conference center. The Marine Corps alone has more than 400 units (artillery, infantry, training, headquarters, logistics, expeditionary). Marines go through the MCB at Quantico at one of more points in their careers, and are said to enjoy returning to the area for reunions while still on active duty or after they retire. Reunions can attract anywhere from 25 to 500 attendees. A hotel and conference center adjacent to the Marine Corps Base is eminently suitable to host reunions.

A secondary line of reunion business is to host high school and college reunions. These would be attracted to the facility less because of its associations with the US Marine Corps, and more because of its character and amenities.

Reunions can result in one or two nights of hotel stays in addition to needing meeting space.

Ceremonies

The area already hosts numerous ceremonies, whether in the Chapel of the NMMC, or in private facilities in Prince William and Stafford County. In the year from March 2010 through February 2011, the Chapel hosted these ceremonies:

- 52 weddings
- 14 receptions
- 12 rehearsals
- 9 memorials
- 11 military ceremonies
- 3 reunions

- 3 baptisms
- 15 other events.

June, July, August, October, and December are the peak months for bookings at the Chapel.

Business Lunch Meetings

Local business and social organizations such as a Chamber of Commerce or Rotary Club are likely to book monthly lunch meetings at the facility.

Leisure Travel Demand

Small bookings can result from capturing affinity group programs, themed travel (history vacations, Civil War tours), and family reunions.

The types of meetings held by each market segment are shown in Table 4.1. The level of demand is indicated by the number of + signs.

Table 4.1 Market Segments and Meeting Space Needs

	Conference	Small Meetings	Lectures	Training	Ceremony	Board	Sales
Government							
MCBQ related	+++	++	++	++	++	-	-
Other DoD	+	++	++	+	+	-	-
Civilian	+	+	+	+	-	-	-
Corporate	+	+	+	++	-	+	++
Association							
National	-	-	-	+	-	-	-
Regional	+	++	+	+	-	+	-
Local	-	++	+	+	-	++	-
Educational	+	++	++	+	-	-	-
Affinity Groups	+	+	+	+	-	-	+
Social							
Reunions	-	+	-	-	+	-	-
Weddings	-	-	-	-	++	-	-
Chamber, Rotary	-	-	-	-	+	++	-

SECTION 5: MEETING AND CONFERENCE SPACE SUPPLY

Competing Conference Facilities in the Market Area

Conference and meeting space is available throughout the Washington region. In nearby Prince William and Stafford Counties and Fredericksburg, meeting space consists of several hotels with one or two small meeting rooms, several facilities that have multiple purposes but can also be booked for meetings, and large facilities such as the Fredericksburg Expo Center or Hylton Chapel. In the more urban portions of the metropolitan area, most hotels offer meeting space ranging from a single room for ten people, to large ballrooms that can be utilized in full or divided into smaller spaces for meetings of 100 to 1,000 or more people. There are a few large conference centers as well, and additional conference facilities are constantly being proposed and tested. As an illustration of the variety of facilities available, the Association of Government Meeting Planners highlights these sites on their webpage:

- Airlie Center in Warrenton
- Crowne Plaza Old Town and Holiday Inn Old Town in Alexandria
- Strategic Analysis Executive Conference center in Arlington
- Collingwood Library in Fairfax County
- Landsdowne Resort in Loudoun County
- Chesapeake Conference Center
- Kingsmill Conference Center in Williamsburg
- Holiday Inn Koger conference center in Richmond
- Hilton Washington North in Gaithersburg
- Crowne Plaza in Silver Spring
- Colony South in Clinton MD
- Doubletree and Sheraton in Annapolis
- Harbourtown Conference Center in St. Michael's MD
- National 4-H Conference Center in Chevy Chase

Meeting Space in Hotels

Washington area hotels often have meeting and conference space incorporated within the hotel. This space may range from one or two breakout rooms, to 15,000 or more square feet of space in a divisible ballroom.

Appendix Table 8 details facilities in Prince William, Stafford, and Fredericksburg, while Appendix Table 9 summarizes facilities in Northern Virginia. There are no directly competing hotels in a 20 minute radius from the Marine Corps Museum. Nine hotels in eastern Prince William County do achieve standard rates of \$130 to \$190 per night at certain times of year or high occupancy periods. These are primarily in the Woodbridge area, although the Hampton Inn Dumfries advertised room rates ranging from \$136-\$214 during the first week of June. None of these hotels have competitive meeting space.

Truly competitive hotels are found in Fairfax and Arlington Counties, and the City of Alexandria.



Crowne Plaza Olde Town Alexandria



Springfield Hilton



Mason Inn and Conference Center

Conference Centers

The region has several facilities that operate primarily as conference centers, expo centers, or meeting spaces, with or without overnight guest rooms. These include:

- Airlie House in Warrenton: provides meeting facilities for up to 200 participants and 150 overnight guest rooms. Amenities include a restaurant, dining room, and recreation.
- The new George Mason Inn and Conference Center in Fairfax: this facility was designed as a public private partnership with George Mason University and provides 148 guest rooms and 39,000 square feet of meeting space in a ballroom and 11 meeting rooms. It supports University events and academic conferences, and the hotel will also be used by attendees at concerts and sporting events held at Patriot Center. The conference center is also available for outside bookings. A restaurant and lounge are also included. It is being operated by Aramark Higher Education Conference Centers.
- Lansdowne Resort in Loudoun County: provides 45,000 square feet of meeting space with 25 dedicated conference rooms and a 120-seat amphitheater. 305 overnight guest rooms are available at the facility, which also offers a business center, dry cleaner, massages, shuttle bus, two restaurants, golf, tennis, and a health club.
- National Conference Center in Loudoun County provides 265,000 square feet of meeting space (including 250 meeting rooms) and guest rooms in three buildings, and an auditorium seating 350. Amenities include a gift shop, dry cleaner, business center, shuttle, dining room, cocktail lounge, café, and sports center. Overnight guest rooms include 950 standard rooms and 78 suites.
- Dulles Expo and Conference Center in Chantilly offers 200,000 sf of function space and nine meeting rooms. A 233-room Holiday Inn is on-site.
- Fredericksburg Expo Center: offers 96,000 square feet of flexible meeting space with high-tech audiovisual and videoconferencing capabilities, and both wired and wireless internet. Its 80,000 square foot exhibit hall can be split into two sections each with its own food court and restrooms. The center has an additional 14,000 square feet for 11 meeting rooms including a 10,000 square foot ballroom. Meeting rooms are equipped with high-tech audiovisual equipment, wireless and wired Internet, and video conference service. Full catering is available. Four partner hotels are sited adjacent to the expo center.
- Executive Conference and Training Center at Dulles (Sterling VA): provides eight conference rooms totaling 10,000 square feet, with capacities from 25 to 250 persons. Meeting packages includes a meeting room for a full day, themed dinner buffet, beverage service, morning and

afternoon snacks, lunch buffet, and themed buffet lunch. Audio visual services include LCD projector, flipcharts, whiteboards, high-speed wired and wireless internet, adjustable lighting, and onsite copying, printing, and faxing. Five partner hotels are nearby to provide overnight accommodations.

- AMA Executive Center in Crystal City, Arlington provides space for meetings of 5 to 220 persons. It includes 10 meeting rooms ranging from 390 to 1640 square feet. Meeting packages include meeting room, projection screen flip charts, white boards, message service, sound system, and continuous beverage service.
- The Ronald Reagan Building and International Trade Center in Washington DC has 64,000 square feet of function space and 22 meeting rooms, a 625-seat amphitheater, and an atrium suitable for banquets.
- Kirkland Center in Silver Spring, MD: provides 33,000 square feet of flexible function space to accommodate meetings from 5 to 750 attendees and 151 guest rooms. The facility has a dining hall for breakfast, lunch, and dinner, a cocktail lounge, and full catering services. Amenities include comprehensive AV services, a business center, fitness and game room.
- Inn and Conference Center at the University of Maryland University College
- Bethesda North Marriott Hotel and Conference Center
- Colony South Hotel and Conference center in Clinton MD
- Harbourtowne Conference Center in Saint Michaels
- National 4-H Conference center in Chevy Chase
- Osprey Point Retreat & Conference Center in Royal Oak Maryland

On the Marine Corps Base itself is the Conference Center at the Clubs at Quantico, which can accommodate seminars, conferences, symposia, and promotion, retirement, and change of command ceremonies. It provides four rooms that seat 80 dinner or classroom style, two smaller rooms for 35 each, and an Enlisted Club seating 50 to 130 depending on the arrangement. The Crossroads Inn is nearby.

Appendix 10 lists conference facilities in the Washington region that are accredited by the International Association of Conference Centers.

Special Venues

There are also dozens of “special venues” that can accommodate weddings, graduations, parties, social gatherings, and small meetings. These may be restaurants, wineries, historic properties, museums, and golf clubs. Within the area close to the NMMC are a number of such facilities, many of which are listed on Appendix Table 8.

New, Planned, or Under Construction Facilities

Fairfax County recently completed a study for a proposed convention center in Tysons Corner that would include a 40-50,000 square foot ballroom and 15,000 square feet of breakout space. The location would be near a planned Metro station and close to other hotels and restaurants.

Arlington recently completed construction on two new hotels in Potomac Yard/Crystal City; one of them, the Renaissance Arlington Capital View, which contains an AMA Conference Center.

Prince William County has the prospect of a new resort hotel and conference facility facing the Potomac River at the Harbor Station development.

Alexandria just inaugurated the Gates Center, an 8,000 square foot space inserted into the existing United Way headquarters building.

Characteristics of Competing Conference/Meeting Space

Competing conference and meeting space runs the gamut of attributes – location, size and number of meeting rooms, number of hotel rooms in the facility, and even whether the facility is primarily a meeting space or not. Meetings and conferences have the flexibility to take place at a hotel with meeting space, at a conference center with or without overnight guest rooms, or at a special venue such as a restaurant or historic mansion. Weddings, reunions, ceremonies, and other social gatherings can take place at the venues named above, plus chapels, pavilions, golf course clubhouses, and numerous other settings. Most meetings will shop around for a facility that is convenient in its location, provides the right size and type of meeting room/s, and is price competitive. A hotel and conference center at NMMC will have an advantage with certain government, military, and ceremonial meetings that relate directly to the Marine Corps.

Amenities Required in Meeting Space

Clients booking meeting space now expect a range of amenities as part of their room rentals:

- Audiovisual package including projector, sound system, whiteboards, flipcharts
- Wired and wireless Internet access
- Webcasting or recording ability
- Flexible arrangement of furniture into different seating styles
- Ballroom that can be subdivided into smaller meeting rooms
- High ceilings
- Full catering service with morning and afternoon break service and sit-down lunch
- Cocktail lounge or cocktail service
- Business center on site
- Professional event staff at the facility to plan for a well-run meeting
- Shuttle service to bring attendees from the airport
- Nearby restaurants, golf, tennis, spa, and recreational facilities
- Overnight guest rooms either on-site or at adjacent hotels
- LEED certification.

CONCLUSIONS REGARDING DEMAND FOR MEETING AND CONFERENCE SPACE

There is clearly a need for new meeting space in the primary trade area. The local convention and visitors associations cite a frequent need to send away potential business, as local facilities are inadequate for all but the smallest meetings. Indeed, Prince William and Stafford County facilities are limited to one or two small meeting rooms in a handful of hotels. Fredericksburg provides more meeting space in facilities such as Hospitality House or the Expo Center; the Expo Center receives considerable business that it may not be ideally suited for, but is the only facility of sufficient size for.

The biggest need is in the government-related market. The Marine Corps University, FBI, DEA, and incoming agencies create hundreds of conferences, seminars, training sessions, and miscellaneous classes each year. These are currently housed in facilities designed decades ago and no longer of sufficient size, flexibility, or technological advancement to satisfy all the needs.

There are additional needs from the corporate and association sectors, and a number of themed small meetings that could conceivably take place near NMMC.

Finally, reunions, ceremonies, and other social events could easily find a home at the conference and meeting facility at NMMC.

Supportable Meeting Space

An ideal configuration would include:

- 9,000 square foot ballroom sub dividable into three sections
- 6-8 small meeting rooms of 250 to 450 square feet each
- 2 training rooms
- Pre-function space
- Ceremonial lobby or vista space
- Full-service restaurant
- Full catering kitchen and service
- Cocktail lounge
- Cafe
- Business center
- Workout/gym room (within the attached hotel)
- Auditorium for 150 people (may be joint use with the NMMC theater)
- Outdoor terrace
- Parking

Services would include shuttle buses, concierge, parking valet, and event planning personnel.

SECTION 6: CONCLUSIONS AND RECOMMENDATIONS REGARDING MARKET

The most likely market segments to need additional or new hotel rooms include the Government and Leisure segments. These groups have different needs and a different level of interest in a hotel by the Marine Corps Museum.

Demand supports:

- Extended stay hotel for government-related training demand
- Highway-oriented hotel for passing motorists and group travel
- Luxury hotel for high-ranking officers and retirees in conjunctions with MCBQ
- Mid-scale hotel rooms in conjunction with a conference center

The government market is a year-round market while the leisure market tends to be an April through October market. One portion of the leisure market, reunions, could take place at any time of year.

The amenities desired in a hotel at the NMMC location include a restaurant and café for a full-service hotel. A fitness center, jogging trails, newsstand/gift shop, and concierge/valet service would all be needed as part of a full-service hotel.

Room rates that can be achieved depend on the market segment, time of year, day of the week, and general demand in the area. A full-service hotel should be able to quote standard rates of \$150-\$190 per night, while an extended stay hotel could charge \$100-\$120, and a highway-oriented hotel \$80-\$100. One challenge is the government segment – the GSA allowable per diem rate is not high enough to support a quality full-service hotel, and the hotel management will be tempted to turn away government business in favor of private sector business when possible, unless the GSA rate can be raised.

The hotel should strive to achieve a stabilized occupancy rate of 68% on a year-round basis, 85% in the summer, and 60% in the winter months. To achieve this rate, it will be necessary to appeal to different market segments and work to fill the valleys between the peaks. There are periods when all market segments will want a room, and periods when customers will be scarce. The hotel sales staff will need to be attuned to difficult periods and work to fill the space.

In general, demand is not created but may be diverted or induced. Potential customers who decide to stay at hotels in Fairfax County due to a higher class or amenities could be captured by a new facility at NMMC that meets their criteria for comfort and appeal. The presence of NMMC induces demand that otherwise would not be present around MCBQ, and the construction of new office buildings could lead to future increases in private sector demand. With the presence of a conference facility, the hotel could attract customers who otherwise stay in Fredericksburg for events at the Fredericksburg Expo Center, or stay at meeting hotels in Fairfax and Arlington.

A 140-200 room hotel is supportable at NMMC, particularly if government per diem rates can be raised and extensive marketing efforts are undertaken in concert with regional tourism development partners.

Meeting space of 15,000 square feet is supportable, configured for flexibility, and with the ability to accommodate conferences, classroom lectures, training sessions, and small meetings.

Food service options should include a full-service restaurant, lobby lounge, and café for breakfast as light lunches. Room service should be available, and banquet service to support the conference center. There is also the prospect of co-managing food service with the restaurants within the Marine Corps Museum.

To make the facility a stronger draw and increase occupancy, the following are recommended:

- Overcome the GSA rate issue for overnight stays
- Enter into contract arrangements for government conference business that emphasize food & beverage service, while avoiding “government rate” room sales and meetings without food & beverage
- Have the Marine Corps Heritage Foundation guarantee a certain number of meetings per year
- Explore certification by the International Association of Conference Centers
- Market the facility to specific high-potential market segments
- Explore co-marketing with related facilities, such as the forthcoming Army Museum and American Wartime Museum
- Ensure the site is visible from I-95

Next Steps

A financial feasibility study should be undertaken to determine potential revenues and RevPar for the hotel and conference center, examining all potential sources of revenue and refining the impact of government rates on the hotel’s book of business. A detailed development pro forma should also be prepared to compare development and operating costs against future potential revenue.

APPENDICES

1. New Construction and Development in Prince William, Stafford, and Spotsylvania Counties, and the City of Fredericksburg
2. Prince William County Federal Submarket: Office
3. Employers in Prince William and Stafford Counties
4. Profile data for Visitors to Fredericksburg
5. STR Scale Rankings
6. Existing Hotel Inventory
 - a: Prince William County
 - b: North Stafford County
 - c: Fredericksburg
7. Meeting and Conference Activity on MCBQ
8. Meeting Space in Hotels in Prince William, Stafford, and Fredericksburg
9. Meeting Space in Northern Virginia
10. IACC-Accredited Facilities in the Washington Area
11. Tourism Attractions in the Washington Area

Appendix Table 1

**Recent New Construction and Announced Developments
Prince William, Stafford, Spotsylvania Counties and Fredericksburg**

Project Name	Development Mix	Project Status
PRINCE WILLIAM CO.		
Woodbridge Urban Mixed Use	2,500-3,500 multi-family units, 500,000-750,000 sf office, 250,000-500,000 sf retail, 260 hotel rooms	Plan and development guidelines; development in the future
Belmont Bay	Mixed use with hotel, retail, office, Science center	under development
Potomac Town Center	500,000 sf retail, 138,000 sf Wegman's, 440,000 sf office, multi-family units	retail portion underway
Harbor Station	2000 acre development plan with 4,000 dwelling units, 3 million sf commercial, golf course, VRE station	planned, but encountered difficulties; on hold. Potential hotel and conference center with water views
Harbor Station Secure Campus	1.5 to 2 million square feet on 160 acres	planned, but encountered difficulties; on hold. Potential hotel and conference center with water views
Quantico Center	200,000 sf office, 52,000 sf fles, 107 room hotel, 70,000 sf retail	substantially complete and mostly leased; Holiday Inn Express, SAIC, Jacobs, Marine Corps Heritage Foundation, Service Engineering, govt contractors
Dumfries Town Center	44,000 sf office; Wounded Warrior Call center	complete
Quantico Gateway	120,000 sf office in 3 buildings	complete
Marine Corps Museum	master planned complex with museum, chapel, memorial garden, hotel and conf center, research and conservation building	museum complete and open.
STAFFORD COUNTY		
Quantico Corporate Center	multi-building office complex	280,000 sf office built, 140,000 sf announced, 30,000 sf office planned
Russell-Knox Building	Office, conference, and training	BRAC building, completion Sept 2011
Hilldrup Moving & Storage	Addition to existing facility	

Source: Prince William and Stafford County Economic Development Departments

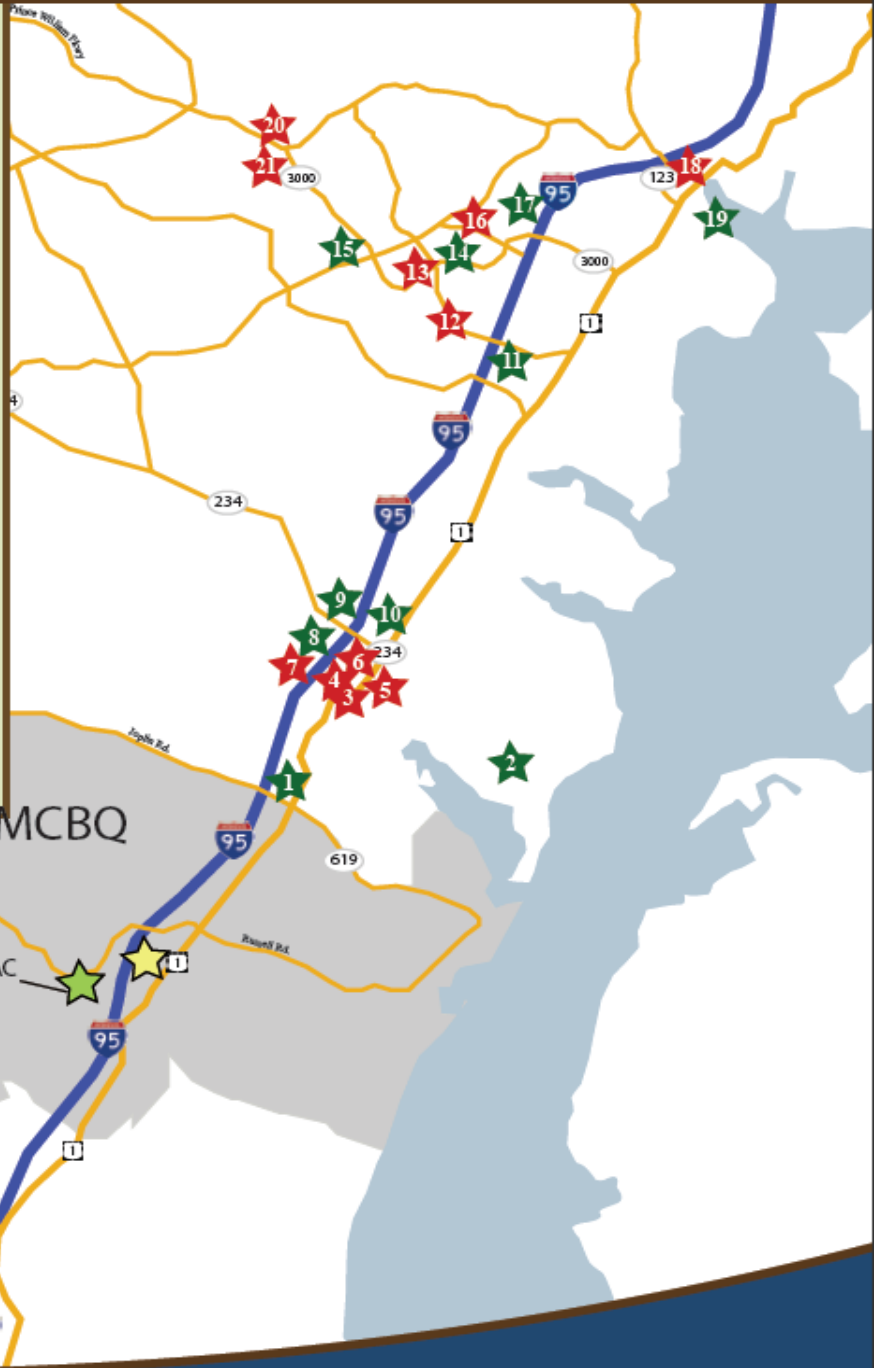
MCBQ / I-95 Federal Submarket Product Summary

Where Technologies Converge



- ★ Buildings
- ★ Sites
- ★ Silver's Quantico Corp. Cntr.
- ★ MDIA Building (BRAC)

1. Quantico Gateway
2. Harbor Station
3. Elwey Bldg.
4. Dumfires Twn. Cntr.
5. Pointe Center
6. 17286 Dumfires Rd.
7. 3655 Fettler Park Dr.
8. Quantico Center
9. Peterson Tract
10. Interstate Overlook
11. Potomac Town Cntr.
12. Potomac Plaza
13. Prince William Commons
14. 2733 Caton Hill Rd.
15. Southern Knolls
16. Caton's Crossing
17. Parkway Empl. Cntr.
18. Devil's Reach Way
19. Belmont Bay
20. Reid's Prospect
21. County Center



Appendix 2: Office Space Locations in Prince William County

Appendix Table 3. Major Employers in the Vicinity of the Marine Corps Museum

County and Employers	Employees	Location
Prince William County		
Prince William County Public Schools	9,723	Manassas
Micron Technology	1,650	Manassas
Lockheed Martin	1,600	Manassas
Potomac Hospital	1,238	
Minnieland Private Day School	854	Woodbridge
PWC Park Authority	818	
Northern Virginia Community College	500	
George Mason University	500	
General Dynamics	452	Woodbridge
S. W. Rodgers Company	450	Gainesville
American Type Culture Collection	390	Manassas
US Postal Service	364	
BAE Systems	330	Dumfries
US Food Service	322	Manassas
American Public University System	300	Manassas
Comcast Cable	300	Manassas
Verizon Communications	300	
Northern Virginia Electric Cooperative	300	Gainesville
Marti-Brower Company	290	Manassas
PWC Service Authority	270	
Progeny Systems Corporation	250	Manassas
Westminster Presbyterian	242	
Kaiser Foundation Healthcare	226	
Arban & Carosi	200	Woodbridge
Envirosolutions	200	
L3 Communications	190	
Aerojet	185	Gainesville
AHC	180	Gainesville
Dominion Virginia Power	176	Woodbridge
EOIR Technologies	175	
Vertis Communications	170	Manassas
Stanley	160	Dumfries
McLane Foodservice Distribution	154	Manassas
Jacobs Technology	150	Dumfries
NCS Technologies	150	Gainesville
Mediatech	150	Manassas
Atlantic Coast Cotton	145	Gainesville
Intercall	135	Manassas
Aurora Flight Sciences	125	Manassas
Williams Industries	120	Manassas
URS Corporation	110	
Universal Dynamics	100	Woodbridge
Novus Consulting	100	Manassas
Stafford County		
GEICO Insurance	3,500	
McLane Mid-Atlantic	850	
Intuit	600	
Hilldrup Companies	300	
Northrop Grumman	300	
BAE Systems	250	
Fredericksburg Auto Auction	250	
Lifecare	250	
MTCSC (Mantech)	250	
Battelle	150	
Dominion Virginia Power	150	
QINETIQ	140	
L3 Communications	125	
Coca-Cola Bottling	100	
General Dynamics	100	
SAIC	100	

Source: Prince William and Stafford County Economic Development Departments

**Appendix 4 Visitor Profiles for Visitors Whose Trip Included Fredericksburg
FY 2007-2009 Profile**

Characteristic	% of Visitors
Purpose of Trip	
Visit people	42%
Business	12%
Conference/seminar	4%
Month of Travel	
Jan-April	7% each month
May	10%
June	11%
July	12%
August/September	7%
October	11%
November	8%
December	6%
Size of Travel Party	
1	32%
2	35%
Mode of Travel	
Private car or truck	83%
Motorcoach or Group Tour	2%
Nights Spent on Trip	
0	20%
1	13%
2	17%
3	12%
More than 3	39%
Type of Lodging	
Hotel/Motel	56%
Private Home	39%
Travel Party Spending	
Less than \$100	33%
\$100-\$250	26%
\$250-\$500	20%
more than \$500	21%
Mean spending per person	\$201
Attractions Visited*	
Civil War Sites	20%
Colonial Sites	21%
Historic sites/churches	19%
Museums	20%
Scenic Drive	21%
State or National Park	23%
Entertainment	
Fine Dining	14%
Shopping Malls	23%
Shopping Outlet Stores	14%
Theme Park	13%

Family Reunion	3%
High School/College Reunion	2%
Top Virginia Attractions Visited	
Fred. & Spots Natl Mil Park	13%
Potomac Mills Mall	12%
Civil War Trails	11%
Arlington Cemetery	9%
GW Parkway	7%
Manassas Natl Battlefield	6%
Advance Planning Time	
Less Than 2 Weeks	51%
2-4 weeks prior	13%
1 to 3 months prior	17%
more than 3 months prior	20%

Source: Survey by TNS Travels America for Virginia Tourism Corporation

**Appendix
Table 5**

Sample Hotel Brands by STR US Chain Scale

Luxury	Upper Upscale	Upscale	Upper Midscale	Midscale	Economy
Four Seasons	Dolce	Courtyard	Clarion	America's Best	Affordable Suites
Grand Hyatt	Embassy Suites	Crowne Plaza	Comfort Inn	Best Western	Budget Suites
Hotel Monaco	Gaylord	Doubletree	Fairfield Inn	Candlewood Suites Country Inn &Suites	Days Inn
JW Marriott	Hilton	Hilton Garden Homewood Suites	Hampton Inn	Hawthorn Suites	EconoLodge Extended Stay America Howard Johnson Express
Mandarin	Hyatt	Summerfield	Holiday Inn	Howard Johnson	
Park Hyatt	Kimpton Marriott Conf Ctr	Radisson	Ramada Plaza TownePlace Suites Wyndham Garden	Motel 6	Microtel Inn
Sofitel	Omni	Springhill Suites Staybridge Suites		Quality Inn	Red Carpet Inn
W Hotel	Sheraton	Wyndham		Sleep Inn Wingate by Wyndham	Super 8 Travelodge
Occupancy by Type US March 2011					
74.0%	72.5%	72.5%	62.7%	54.4%	53.6%

Source: Smith Travel Research

Appendix Table 6.a

Existing Hotel Inventory in Prince William County

Location	Hotel	Rooms	Standard Rate June	Meeting Space	Restaurant
I-95	Best Western Potomac Mills	172	\$133-\$190	yes	No
I-95	Comfort Inn Dumfries	80	\$100-\$170	no	No
	Country Inn & Suites		\$143-\$189	yes	No
I-95	Woodbridge	100		yes	No
I-95	Courtyard Potomac Mills	118		yes	Yes
I-95	Days Inn Dumfries	71		no	No
I-95	EconoLodge Dumfries	134	\$55-\$70	no	No
I-95	EconoLodge Woodbridge	65	\$80-\$90	no	No
I-95	Fairfield Inn Potomac Mills	85	\$135-\$170	yes	No
I-95	Hampton Inn Potomac Mills	87	\$160-\$189	no	No
I-95	Hampton Inn Dumfries	78	\$136-\$214	no	No
I-95	Holiday Inn Quantico Center	107		yes	Yes
	Holiday Inn Express			no	No
I-95	Woodbridge	84		no	No
I-95	Quality Inn Woodbridge	93	\$95-\$180	no	No
I-95	Ramada Quantico	135	\$113-\$199	yes	Yes
I-95	Residence Inn Potomac Mills	106	\$169-\$379	no	No
I-95	Rodeway Inn Woodbridge	39	\$72-\$110	no	No
I-95	Sleep Inn Woodbridge	61	\$100-\$126	no	No
I-95	Sleep Inn Dumfries	56	\$88-\$105	no	No
I-95	Springhill Suites Potomac Mills	98	\$156-\$164	yes	No
I-95	Super 8 Dumfries	81	\$60-\$70	no	No
I-95	Wytestone Suites Woodbridge	85		yes	No
8	Subtotal Quantico Area	742		2	2
13	Subtotal Woodbridge Area	1193		6	1
21	Subtotal I-95 market	1935		8	3
Manassas	Best Western Battlefield	123		yes	Yes
Manassas	Best Western Manassas	60	\$96-\$150	no	No
Manassas	Candlewood Suites	100		no	No
Manassas	Comfort Suites Manassas	138		yes	No
Manassas	Country Inn & Suites Manassas	79		no	No
	Courtyard by Marriott			no	No
Manassas	Manassas	149		no	No
Manassas	Days Inn Manassas	55		no	No
Manassas	Fairfield Inn Manassas	80		no	No
Manassas	Four Points Sheraton Manassas	80		no	Yes
Manassas	Hampton Inn Manassas	125		no	No
Manassas	Holiday Inn Battlefield	104		yes	Yes
Manassas	Home Style Inn Manassas	59	\$65	no	No
Manassas	Olde Towne Inn	59	\$70-75	no	No
Manassas	Quality Inn Manassas	120		no	No
Manassas	Red Roof Manassas	119		no	No
Manassas	Residence Inn Manassas	107		no	No
Manassas	Super 8 Manassas Old Town	79		no	No
Manassas	Super 8 Manassas Battlefield	150		no	No
18	Subtotal Manassas Market	1786		3	3
Gainesville	Hampton Inn Gainesville	85		no	No
	Value Place Gainesville	113		no	no
2	Subtotal Gainesville	198		0	0
41	TOTAL Prince William County	3919		11	6

Source: Field Research

Appendix Table 6.b Existing Hotel Inventory in Northern Stafford County

Location	Hotel	Rooms	Meeting Space	Restaurant
I-95 exit 143	Best Western Aquia	119	yes	adjacent
I-95 exit 143	Comfort Inn Quantico	83	yes	adjacent
Garrisonville Rd	Country Inn by Carlson	58	yes	adjacent
Aquia	Hampton Inn Stafford	88	yes	no
I-95 exit 143B	Holiday Inn Express Stafford	54	no	no
Stafford	Marriott Towne Place Suites	93	yes	no
Quantico	Staybridge Suites Quantico	83	yes	no
I-95 exit 143	Super 8 Stafford	26	no	no
Stafford	Wingate by Wyndham Stafford	99	yes	no
COUNT				
9		703	7	0

Northern Stafford includes I-95 exits 148 and 143

Source: Field research

Appendix Table 6.c

Existing Hotel Inventory in Fredericksburg/S. Stafford

Location	Hotel	Rooms	Meeting Space	Restaurant
I-95 exit 133	Clarion Inn US 17	110	yes	adjacent
I-95 exit 133	Comfort Suites F	72	yes	adjacent
I-95 exit 133	Country Inn & Suites	85	yes	adjacent
I-95 exit 133	Days Inn North F	120	no	adjacent
I-95 at 17	Holiday Inn Express F	120	yes	no
I-95 exit 133	Howard Johnson	82	no	no
I-95 exit 133	Motel 6 F	38	no	no
I-95 exit 133	Quality Inn F	66	no	yes
I-95 exit 133	Sleep Inn F	68	no	yes
I-95 exit 133	Super 8 F	78	no	adjacent
I-95 exit 133	Super Value Inn F	41	yes	no
I-95 exit 133	Travelodge F	59	no	adjacent
I-95 exit 133	Wingate by Wyndham F	131	yes	no
	13 Subtotal, South Stafford	1070	6	2
I-95 exit 130	America's Best Value	128	yes	adjacent
I-95 exit 130	Best Western F	108	yes	adjacent
I-95 exit 130	Best Western Central Plaza	76	no	adjacent
I-95 exit 130	Courtyard Historic District	98	yes	yes
I-95 exit 130	Hospitality House	196	yes	yes
I-95 exit 130	Hampton Inn & Suites	122	yes	no
I-95 exit 130	Hilton Garden Inn	148	yes	yes
I-95 exit 130	Homewood Suites	124	yes	no
I-95 exit 130	Inn at Olde Silk Mill	30	yes	adjacent
I-95 exit 130	Kenmore Inn	9	yes	yes
I-95 exit 130	Quality Inn Central Plaza	166	yes	adjacent
I-95 exit 130	Residence Inn	124	yes	no
I-95 exit 130	Richard Johnston Inn	17	yes	adjacent
I-95 exit 130	Super 8 F	58	no	adjacent
	14 Subtotal, Fredericksburg	1404	13	4
	27 TOTAL	2474	19	6

Source: field research

Appendix Table 7 A Sampling of Meetings and Conferences Associated with Marine Corps Base Quantico

Sponsor	Types of Meetings	Where Held
Marine Corps University	2008: 754 conferences	on base, Gray Research Center
	2008: 368 classes or courses	on base, Gray Research Center
	2008: 350 events	on base, Gray Research Center
	2010: 790 conferences	On base, Gray Research Center
	2010: 259 classes	On base, Gray Research Center
	2010: 10 ceremonies	On base, Gray Research Center
Marine Corps Combat Development Command	2010: 213 conferences off base, 20 on-base	
Minerva Institute and MCU	April 2011: Emerald Express Strategic Symposium	Gaylord Conference Center
MCU	Sept 2009: Emerald Express -- Counterinsurgency Leadership	National Press Club, DC
MCU	Feb 2010 Erskine Lecture	on base, Little Hall
MCU	Jan 2010 Erskine Lecture	on base, Ellis Hall
MCU	Jan 2011: Geopolitics of Northern Mexico	Reserve Officers Association, DC
	Sept 2011 Modern Day Marine Expo	on base
	Commands that Use Facility On Base:	Gray Research Center
	Training and Education Command	
	Office of Personnel Management	
	Combat Development Command	
	Network Operations and Security Command	
	Information Operations Center	
	FBI Academy	
	HQ Marine Corps – Pentagon	
	Operational Test and Evaluation Activity	
	Marine Corps Systems Command	
	HQ MCCS	
	Wounded Warrior Regiment	
	JPRA	
	Naval Health Clinic	
	Manpower & Reserve Affairs	
	Marine Corps Intelligence Agency	

Source: Marine Corps Heritage Foundation research

Appendix Table 8 Meeting Facilities in Prince William and Stafford Counties and Fredericksburg

Prince William County

Best Western Potomac Mills	2 meeting rooms
Best Western Battlefield	4 meeting rooms
Comfort Suites Manassas	4 meeting rooms
Country Inn & Suites Woodbridge	2 meeting rooms
Courtyard Potomac Mills	2 meeting rooms
Fairfield Inn Potomac Mills	1 meeting room
Holiday Inn Battlefield	2 meeting rooms
Holiday Inn Quantico Center	1 meeting room
Ramada Quantico	1 meeting room
Springhill Suites Potomac Mills	1 meeting room
Super 8 Manassas Battlefield	2 meeting rooms
Wytestone Suites Woodbridge	1 meeting room
Arthur Keller Theater Manassas	
Cramer Center	
Loy E. Harris Pavilion	capacity 500-1000
Hylton Performing Arts center	1,120 seat hall, foyer
Hylton Memorial Chapel	3,500 seat sanctuary, 3-4 meeting rooms; "hosts Christian events"
Jiffy Lube Live	
Mary Louise Jackson Amphitheater	750-seat outdoor facility
Harborview Event Center	2 ballrooms, 12,000 sf
Evergreen Building Liberia and Rt 234	

Stafford County and Fredericksburg

Best Western Aquia	1 meeting room
Comfort Inn Quantico	1 meeting room
Comfort Suites Fredericksburg	1 meeting room
Hampton Inn Stafford	1 meeting room
Towne Place Stafford	1 meeting room
Wingate by Wyndham Fredericksburg	210-450 capacity ballroom, 6 meeting rooms
Wingate by Wyndham Stafford	3 meeting rooms
Inn at Fredericksburg Square	3,300 sf ballroom, 2,500 sf mtg rooms
Courtyard Marriott Fredericksburg	ballroom and boardroom
Fredericksburg Hospitality House	6,544 sf ballroom, 2,760 sf ballroom, 4 meeting rooms
Hampton Inn & Suites Fredericksburg	2 meeting rooms
Homewood Suites	1 meeting room
Inn at Old Silk Mill	1 meeting room
Kenmore Inn	3 meeting rooms
Holiday Inn North	2 meeting rooms
Fredericksburg Expo & Conference Ctr	80,000 sf expo hall, 10,000 sf ballroom, 11 meeting rooms
Jepson Alumni Executive Center	3,400 sf ballroom, 1 meeting room
Mary Washington University	2 outdoor venues
Fredericksburg Area Museum	3 meeting rooms
U of Mary Washington Graduate College	ballroom, classroom, 2 labs

Cannon Ridge Golf Club	banquet room, 1 meeting room
Bragg Hill Family Life Center	classroom
Marine Corps Museum	banquet room
Potomac Point Winery	ballroom, 3 meeting rooms
Riverside Dinner Theater	three large meeting rooms
Rock Hill Plantation	1 large meeting room
Rowser Complex	4 meeting rooms
Pavilion at Belmont	1,435 sf pavilion
Globe & Laurel Restaurant	2 meeting rooms
TJ's Catering	banquet room, one meeting room
Augustine Clubhouse	1 meeting room
Country Fare Restaurant	one meeting room
Gauntlet Clubhouse	1 meeting room
Gari Melchers Home	1 meeting room

Source: Field Research and local tourism bureaus

Appendix Table 9 Sample Meeting and Conference Facilities in the Washington Region

	Number of Hotel Rooms	Conference Space
WBJ Top 100	40,052	2,729,200 square feet
Range per hotel	203-2,000	1,800-470,000 square feet
Alexandria	4,733	131,000 square feet
Hilton Mark Center	496	35,000 sf
Westin Carlyle	319	20,000 sf
Hilton Old Town	246	7,667 square feet
Arlington	10,538	326,500 square feet
Hilton Crystal City	386	15,030 sf
Ritz Carlton Pentagon City	366	19,000 sf
Sheraton National	408	25,000 sf
Fairfax	7,789+	474,720+
Mason Inn	148	39,000 sf
Sheraton Tysons	443	40,000 sf
Fairview Park Marriott	395	15,000 sf
Hilton McLean	458	27,000 sf
Ritz-Carlton Tysons	398	6,800 sf
Courtyard Tysons	229	9,000 sf
Fairview Fair Oaks	310	8,918 sf
Hilton Springfield	245	10,000 sf
Hyatt Dulles	376	7,322 sf
Loudoun		
Lansdowne Conference Center		45,000 sf
National Conference Center		265,000 sf

Source: Field Research

Appendix 10. IACC-Accredited Facilities in the Washington Area

Name	Mtg Facilities	Rooms	Amenities
Airlie Conf Center, Warrenton VA	up to 200 participants	150 guest rooms	concierge, A/V, dining room, restaurant, recreation
Founders Inn, Virginia Beach VA	25,000 sf in 20 mtg rooms (10 breakout+12,876sf ballroom, 78 seat amphitheater	240 guest rooms and 9 suites	video projection, A/V, concierge, restaurants (3), fitness center and pool, tennis, gift shop
Donaldson Brown Hotel & Conf Ctr, Blacksburg VA	10 rooms for up to 600 total	128 rooms	video, A/V, 6 dining rooms, campus fitness & sports
Holiday Inn Tysons Conf & Trng Ctr	4 mtg rooms for 10-60 people each	Holiday Inn	
Hilton Mark Center Exec Ctr, Alexandria VA	7 rooms	496 rpp,s	A/V, lake, fitness ctr, pool
Hotel Roanoke & Conf Ctr, Roanoke VA	63,000sf in 35 mtg rooms for 10-1400. 3 ballrooms, tiered lecture hall	332 rooms including 19 suites	internet access, AV, bus ctr, gift shop, fitness center, pool, dining room for up to 1100, pub, breakfast
Kingsmill Resort & Conf Ctr, Williamsburg VA	16,000 sf conf space with 16 dedicated mtg rooms	400 villa-style rooms and suites	AV, shuttle, five restaurants, golf, tennis, spa, pool
Lansdowne Resort, Leesburg VA	45000 SF with 25 dedicated conf rooms; 120-seat amphitheater.	305 rooms	AV, biz ctr, dry clean, massage, shuttle, 2 restaurants, golf, tennis, health club
Virginia Crossings Resort, Glen Allen VA	25000 sf incl 23 mtg rooms for 7 to 350; 4700 sf ballroom.	183 rooms	2 restaurants, fitness ctr, pool, golf
National Conference Center, Lansdowne VA	1 mil sf in 3 bldgs, auditorium for 350; 250 mtg rooms	950 rooms, 78 suites	AV, gift shop, dry clean, buz ctr, shuttle, dining room, cocktail lounge, café, sports ctr
Exec Mtg Ctr, Embassy Suites Richmond VA	1000 sf for up to 100	226-2room suites	biz ctr, restaurant and lounge, pool, sauna, fitness
Waterfront Conf Ctr Renaissance Portsmouth, VA	24000 sf, 70 seat amphitheater, 5 mtg rooms, 2 ballrooms	249 rooms	AV, restaurant, exercise facil, pool
Belmont Conf Ctr, Elkridge MD	3 rms, 2100 sf	21 rooms	
Bolger Center, Potomac MD	75 mtg rooms, 60000 sf mtg space	477 guest rooms	

Burkshire Marriott Conf Ctr, Towson MD 11000 sf, 19 conf rms, 70-150 people per. 135 suites

Conf Ctr at Maritime Inst, Linthicum Heights MD 45 mtg rms tot 41000 sf; 350 seat auditorium 232 guest rms

Exec Mtf Ctr Doubletree Rockville MD

Marriott Inn & Conf Ctr, UMD Univ College, Adelphi MD

Mount Washington Conf Ctr, Baltimore MD

Wye River Conf Ctr at Aspen Institute, Queenstown MD

Gallaudet U Kellogg Conf Ctr, DC

Acad for Educational Development Conf Ctr, DC

Source: International Association of Conference Centers

Appendix 11. Tourism Attractions in the Washington Region

DC Monuments and Memorials

FDR Memorial
Jefferson Memorial
Korean War Veterans Memorial
Lincoln Memorial
National Mall
National World War II Memorial
Reflecting Pool
US Capitol
Vietnam Veterans Memorial
Washington Monument

DC Attractions

Bureau of Engraving and Printing
FBI Building
Georgetown
International Spy Museum
Library of Congress
Nationals Stadium
National Zoo
Phillips Collection
Smithsonian Museums
Verizon Center
White House

Northern Virginia Monuments and Memorials

Air Force Memorial
Arlington Cemetery
Fredericksburg National Military Park
Manassas National Battlefield Park
Marine Corps Iwo Jima Statue
Pentagon 9-11 Memorial
Wilderness Battlefield

Northern Virginia Attractions

Alexandria – Old Town
American Wartime Museum (planned)
Fredericksburg – Old Town
George Washington Memorial Parkway
Gunston Hall
Lorton Art Center
Manassas – Old Town
Mt. Vernon and Grist Mill
National Museum of the US Marine Corps
Occoquan – town
Pohick Church
Torpedo Factory Art Center
US Army Museum (planned)
Udvar-Hazy Air and Space Museum
Woodlawn Plantation