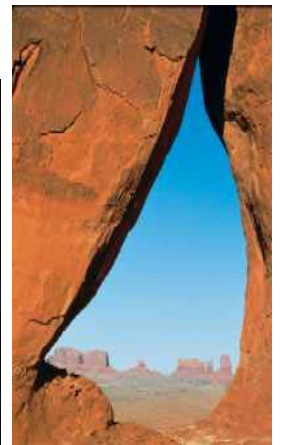
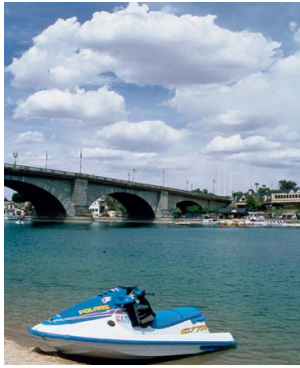


ARIZONA TOURISM STATISTICAL REPORT 2002



Total Overnight Visitor Profile — 2002

Total Number of Domestic Visitors	26.9 million
Average Length of Stay	4.1 days
Average Travel Party Size	2.4
Average Annual Household Income	\$73,000
Median Age of Head of Household	44
Daily Expenses Per Person	\$108.49
Total Spending Per Person	\$444.81
Direct Spending	\$12.01 billion



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Janet Napolitano, **Governor**, State of Arizona

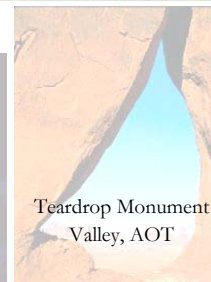
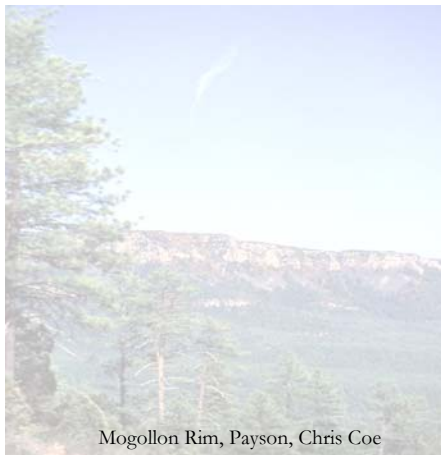
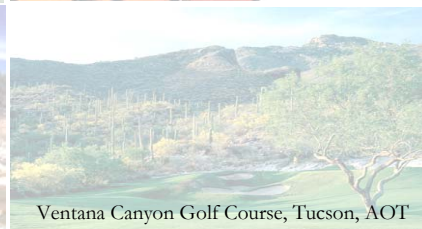
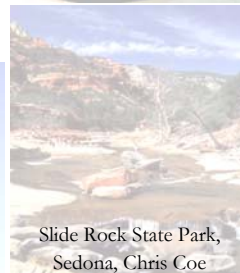
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1. Arizona Department of Economic Security
2. Arizona Department of Commerce
3. Arizona Department of Revenue
4. Arizona State Parks
5. D.K. Shifflet and Associates, Ltd.
6. National Parks Service
7. Smith Travel Research
8. U.S. Department of Commerce, Tourism Industries

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ARIZONA QUICK FACTS

State Slogan:	“The Grand Canyon State”
State Motto:	<i>Ditat Deus</i> , God Enriches
State Bird:	The Cactus Wren
State Tree:	The Palo Verde Tree
State Flower:	The Saguaro Cactus Bloom
State Gemstone:	Turquoise
Area:	113,956 square miles, the sixth-largest state in the U.S.

State Population: 2000 5,130,632

Population By County	
Apache	67,423
Cochise	117,755
Coconino	116,320
Gila	51,335
Graham	33,489
Greenlee	8,547
La Paz	19,715
Maricopa	3,072,149
Mohave	155,032
Navajo	97,470
Pima	843,746
Pinal	179,727
Santa Cruz	38,381
Yavapai	167,517
Yuma	160,026

Annually Tourism in Arizona:

Contributes approximately \$16 billion in direct visitor spending

Contributes approximately \$30 billion in total direct economic impact

Generates nearly \$1 billion in tax revenues to the state

Contributes nearly \$35 million directly to education through .6% “education tax”

Generates more than 450,000 total jobs

Generates nearly \$12 billion in payroll income

Source: Arizona Department of Commerce

Top Tourist Attractions	2002 Attendance	Top Natural Tourist Attractions	2002 Attendance
1. Bank One Ballpark	3,200,000	1. Grand Canyon National Park	4,339,139
2. Tempe Town Lake	2,000,000	2. Saguaro National Park	3,437,830
3. America West Arena	1,539,288	3. Glen Canyon National Rec. Area	2,128,374
4. The Phoenix Zoo	1,100,000	4. Lake Mead National Rec. Area	1,877,570
5. London Bridge	1,000,000	5. Coronado Nat. Forest & Sabino Canyon Rec. Area	1,500,000
6. Arizona State University Sun Devil Stadium	626,017	6. Canyon de Chelly	1,447,774
7. Rawhide Western Town & Steakhouse	600,000	7. South Mountain Park	1,000,000
8. WestWorld of Scottsdale	533,888	8. Montezuma Castle Nat. Monument	644,066
9. Arizona Science Center	498,647	9. Hubbell Trading Post Nat. Historic Site	590,012
10. Arizona-Sonora Desert Museum	470,000	10. Patagonia Lake State Park	571,705

Source: Arizona Office of Tourism

INTRODUCTION

The *Arizona Tourism Statistical Report 2002* is a comprehensive, concise and readily usable statistical reference source on the Arizona tourism industry. The specific purposes of the report are to develop and disseminate tourism-related statistics that provide a broad overview of the Arizona's tourism industry over time, and to provide information on both domestic and international visitors to the state and their travel behaviors.

The report includes fast facts about Arizona, an overview of the tourism

industry, including historical visitation and direct spending trends, an analysis of key industry sectors such as hotel/motel and state and national parks, and profiles of visitors to Arizona. The focus of the report is on Arizona's domestic overnight visitors. Tourism is defined as any trip from home that includes an overnight stay or a day trip which is 50 or more miles one way from home that is not part of the normal routine.

Although every effort has been made to make this report as comprehensive as possible by touching on many topics, it is not exhaustive. This report can serve as a starting point and guide to more detailed collections of data. The most current data are available on the Arizona Office of Tourism web site: www.azot.com.



"...PURPOSE OF THE REPORT ARE TO DEVELOP AND DISSEMINATE TOURISM-RELATED STATISTICS THAT PROVIDE A BROAD OVERVIEW OF ARIZONA'S TOURISM INDUSTRY OVER TIME..."



EXECUTIVE SUMMARY

★ Arizona hosted 26.9 million domestic overnight visitors in 2002—down only 0.9 percent from 2001 when the state hosted 27.1 million domestic overnight visitors. US overnight travel volume increased slightly, up 0.9 percent.

★ Direct Spending among domestic overnight travelers rose 3.7 percent, from \$11.58 billion in 2001 to \$12.01 billion in 2002.

★ From 2001 to 2002, average party size among total domestic overnight travelers dropped 7.3 percent, from 2.6 persons per trip to 2.4 persons per trip.

★ The average Arizona domestic

overnight visitor spent \$108 per person per day in 2002, up from \$105 in 2001.

★ Travelers with annual household incomes of \$75,000+ grew 11 percentage points, indicating a more affluent travel market in 2002 (45% of the market). The average domestic overnight visitor had an annual household income of \$70,200 in 2002.

★ Arizona experienced 6.4 percent decline in overseas visitors in 2002, a trend also seen in the U.S. market as a whole.



Flagstaff's Snowbowl



ARIZONA LODGING PERFORMANCE

During 2002, the continued sluggish economy and lackluster business travel stunted the growth of Revenue per Available Room (RevPAR) and Average Daily Rates (ADR). However, the state outperformed the nation in occupancy. The nation's occupancy rate declined by 1.0 percent, while Arizona's occupancy rate grew by 0.3 percent. Statewide, Arizona lost 3.7 percent in Average Daily Rate, down to \$83.08 from \$83.78 in 2001. RevPAR was down 3.5 percent in 2002. In light of this, both demand and supply statewide increased during 2002, up 0.7 percent and 0.5 percent, respectively. Statewide demand was 20.5 million rooms and statewide supply was 35.0 million rooms.

Metro Phoenix occupancy rates fell slightly by 0.7 percent, to 57.8 percent from 58.2 percent in 2001. Average Daily Rates decreased by 4.6 percent, down to \$94.24 from \$98.81 in 2001. RevPAR also decreased in 2002, down by 5.3 percent.

Metro Tucson occupancy rates declined by 2.5 percent, down to 59.3 percent from 60.8 percent in 2001. Average Daily Rates declined by 2.8

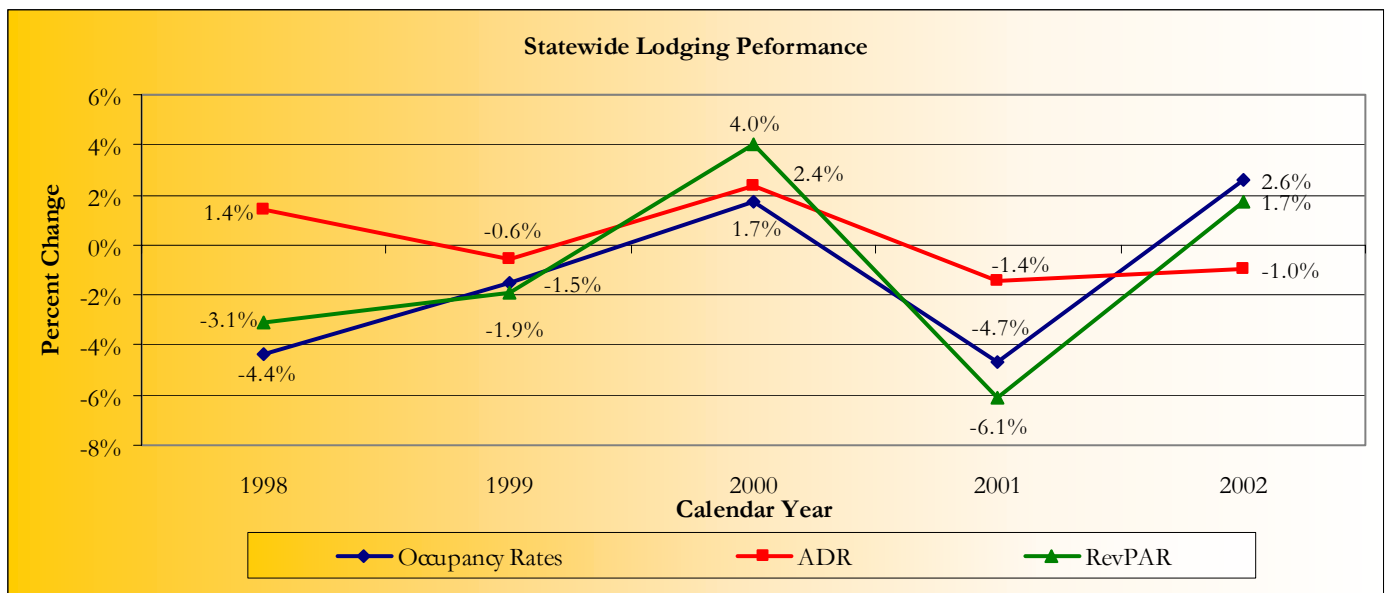
percent, down to \$80.23 from \$82.57 in 2001. Similar to the metro Phoenix area, RevPAR for Metro Tucson decreased by 5.3 percent, down to \$54.46 in 2002. Room demand increased by 3.2 percent, while room supply decreased by 0.3 percent.

The non-metro areas of Arizona experienced slight gains in occupancy, up 3.7 percent from 2001, and in RevPAR, up 3.0 percent from 2001. Average Daily

Rates fell slightly to \$63.50, down from \$63.87 in 2001. Rooms demanded increased by 3.2 percent, from 5.8 million in 2001 to 6.0 million in 2002.

2002 Year to Date Percent Change					
	Occupancy	ADR	RevPAR	Demand	Supply
United States	-1.0%	-1.5%	-2.5%	0.8%	1.8%
Mountain Region	-1.0%	-1.5%	-2.6%	-0.2%	0.9%
Arizona	0.3%	-3.7%	-3.5%	0.7%	0.5%
Metro Phoenix	-0.7%	-4.6%	-5.3%	-0.1%	0.6%
Metro Tucson	-2.5%	-2.8%	-5.3%	-0.6%	1.9%
Non-Metro AZ	3.7%	-0.6%	3.0%	3.2%	-0.3%

Source: Smith Travel Research





ARIZONA LODGING PERFORMANCE

2002 County Lodging Performance

	Occupancy	Room Rate	RevPAR	Demand	Supply
Apache	49.8%	\$70.84	\$35.28	148,587	298,402
% Change from 2001	0.3%	-0.6%	-0.3%	0.3%	0.0%
Cochise	65.2%	\$50.10	\$32.64	539,063	827,279
% Change from 2001	1.7%	-1.0%	0.7%	1.7%	0.0%
Coconino	57.2%	\$62.21	\$35.57	2,066,145	3,613,631
% Change from 2001	0.6%	-4.2%	-3.6%	-0.3%	-1.0%
Gila	58.1%	\$55.04	\$31.96	208,200	358,536
% Change from 2001	9.1%	-2.8%	6.5%	8.4%	-0.7%
Graham	54.4%	\$57.40	\$31.20	66,167	121,741
% Change from 2001	5.6%	-2.4%	3.4%	5.6%	0.0%
Greenlee	n/a	n/a	n/a	n/a	n/a
% Change from 2001	n/a	n/a	n/a	n/a	n/a
La Paz	n/a	n/a	n/a	n/a	n/a
% Change from 2001	n/a	n/a	n/a	n/a	n/a
Maricopa	58.4%	\$99.04	\$57.83	11,025,638	18,883,107
% Change from 2001	0.2%	-3.6%	-3.4%	1.0%	0.8%
Mohave	61.5%	\$47.64	\$29.29	898,616	1,461,411
% Change from 2001	3.8%	9.3%	12.8%	2.1%	-1.8%
Navajo	55.6%	\$53.59	\$29.81	552,683	993,422
% Change from 2001	3.0%	0.7%	3.7%	3.5%	0.5%
Pima	60.4%	\$80.00	\$48.33	3,121,579	5,167,385
% Change from 2001	-1.0%	-1.0%	-1.9%	1.1%	2.0%
Pinal	57.6%	\$66.53	\$38.32	318,789	553,417
% Change from 2001	2.9%	-9.2%	-6.1%	2.9%	0.0%
Santa Cruz	n/a	n/a	n/a	n/a	n/a
% Change from 2001	n/a	n/a	n/a	n/a	n/a
Yavapai	62.6%	\$91.81	\$57.51	1,031,987	1,647,505
% Change from 2001	0.6%	0.0%	0.6%	0.6%	0.0%
Yuma	62.8%	\$54.49	\$34.23	534,238	850,495
% Change from 2001	7.5%	-5.6%	2.3%	7.5%	0.0%

Source: Smith Travel Research, N/A: Not Available



ARIZONA TOURISM RELATED TAX REVENUES

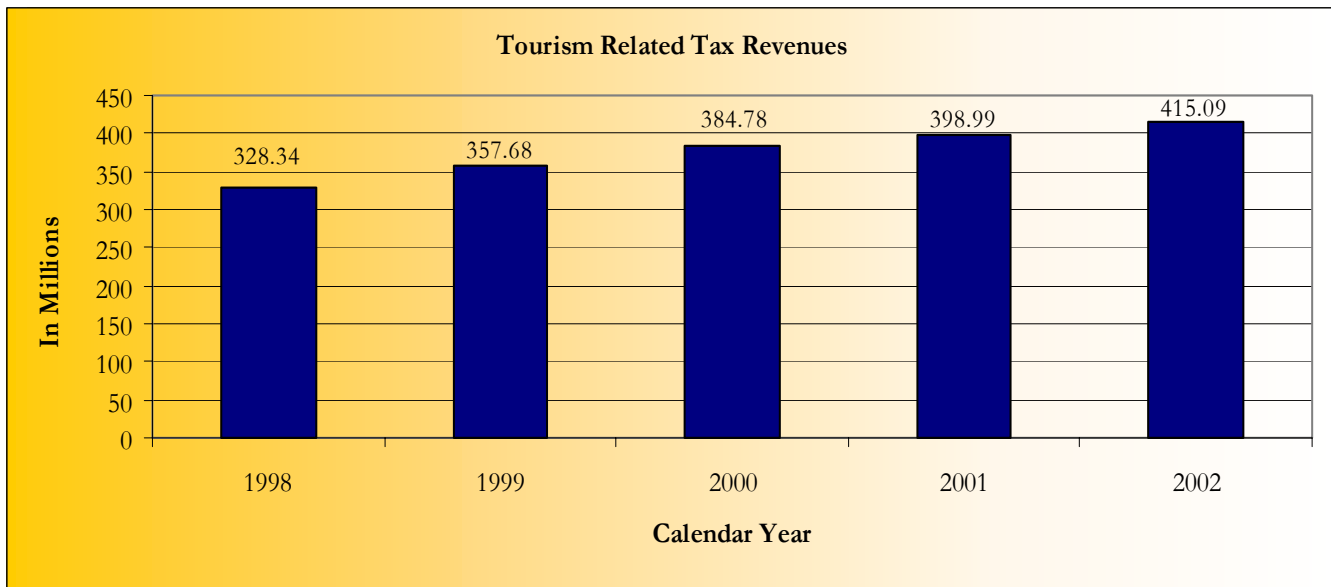
In 2002, tourism sectors (lodging, restaurant/bar, retail, and amusements) generated more than \$415 million in tax revenue, a 4 percent increase over 2001. Lodging tax revenues were the only industry sector that underperformed 2001 levels, down 3.9% from 2001. In all other tourism sectors, tax revenues outperformed 2001 levels.

The largest gain was in the amusement category, up 12.9 percent

from 2001, with total tax revenues of more than \$2.8 million. Another strong gain was the restaurant/bar category, up 8.3 percent from 2001, with total tax revenues of more than \$86.7 million. Total tax revenues for Arizona gained 4.0 percent compared to 2001, a positive sign that the sluggish economy has not eliminated consumers' buying and spending power.

"THE LARGEST GAIN WAS IN THE AMUSEMENT CATEGORY, UP 12.9 PERCENT FROM 2001, WITH TOTAL TAX REVENUES OF MORE THAN \$2.8 MILLION."

Arizona Tourism Related Tax Revenues			
	2002	2001	% Change
Hotel/Motel	\$88,002,533	\$91,550,361	-3.9%
Restaurant/Bar	\$86,794,122	\$80,153,383	8.3%
Retail	\$237,452,048	\$224,767,871	5.6%
Amusements	\$2,840,866	\$2,516,256	12.9%
Total	\$415,089,569	\$398,987,871	4.0%



Source: Arizona Department of Revenue

Tourism sectors as defined by the Tourism Economic Impact Model (TEIM) developed by the Travel Industry Association of America, and adapted for Arizona by Northern Arizona University, include: lodging, restaurant/bar, retail, and amusements. TEIM model produced the following percentages, which are used to figure gross sales attributable to tourism: lodging (95%), restaurant/bar (23.62%), retail (10.91%), and amusements (6.43%).



ARIZONA AIRPORT PASSENGER TRAFFIC

During 2002, the airline industry continued to suffer from the devastation of September 11. Consumer travel behavior nationally shifted towards shorter, closer to home, drive destinations. Crucial losses were felt from a decrease in international visitors. In 2002, more than 39 million passengers passed through Arizona's airports, a slight decrease of 0.4 percent.

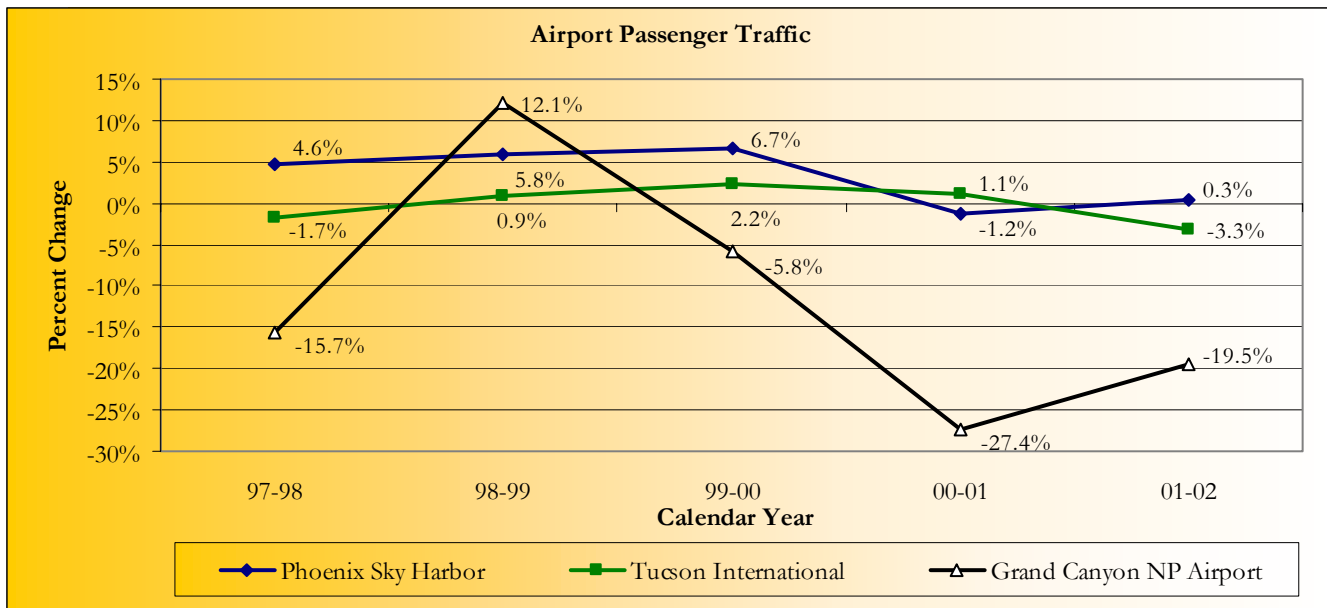
Grand Canyon National Park

Airport experienced the most considerable decrease, down 19.8 percent from 2001. Tucson International Airport also experienced decreased passenger traffic, down 3.3 percent from 2001. Phoenix Sky Harbor Airport ended 2002 with only a 0.3 percent gain over 2001. The most significant gain was at Yuma International Airport, up 6.2 percent in passenger traffic from 2001.

"THE MOST SIGNIFICANT GAIN WAS AT YUMA INTERNATIONAL AIRPORT, UP 6.2% IN PASSENGER TRAFFIC FROM 2001."

Arizona Airport Passenger Traffic			
	2002	2001	% Change
Grand Canyon	658,889	822,012	-19.8%
Phoenix Sky Harbor	35,547,167	35,439,031	0.3%
Tucson International	3,507,883	3,627,798	-3.3%
Yuma International	104,639	98,519	6.2%
Total	39,818,578	39,987,360	-0.4%

Source: Information supplied by the airports themselves



Source: Information supplied by the airports themselves



ARIZONA STATE PARKS VISITATION

For 2002, State Park visitation decreased drastically from 2001 levels, down by 10.2 percent. In addition to the sluggish economy and effects of September 11, other external factors hindered visitation at Arizona's state parks. Budget cuts in July of 2002 forced Catalina, Lost Dutchman, McFarland, Oracle, Picacho Peak, Roper Lake, and Tubac Presidio to remain closed from July 7 through August 9, 2002.

Summer wild fires also reduced visitation to the state parks in the White Mountain region where the damage was the greatest. Oracle State Park, in Southern Arizona, gained the most visitors in 2002, up 68 percent from 2001.

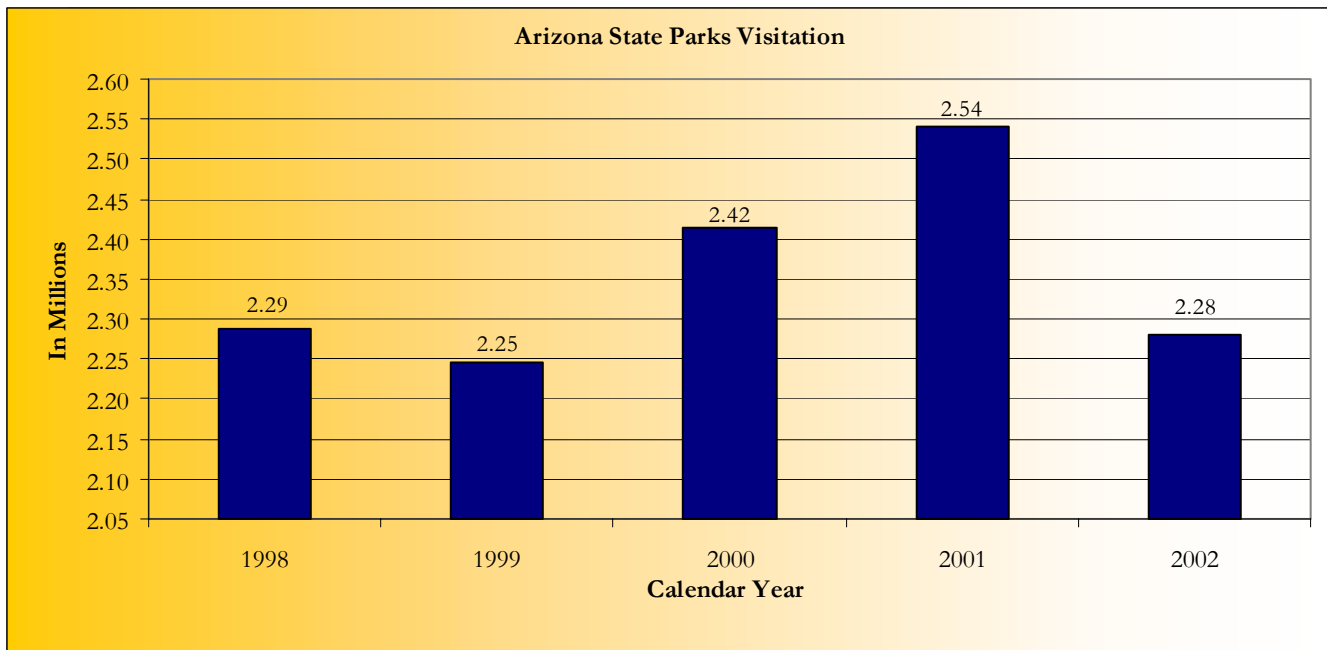
In Northern Arizona, Red Rock State Park and Riordan Mansion increased visitation in 2002, up 14.2 percent and 12.4 percent, respectively.

Along the western edge of the state, Lake Havasu visitation gained 9.1 percent in 2002 compared to 2001.

"ORACLE STATE PARK, IN SOUTHERN ARIZONA, GAINED THE MOST VISITORS IN 2002, UP 68% FROM 2001."

State Park	2002
Lake Havasu	407,759
Patagonia Lake	207,235
Kartchner Caverns	191,661
Slide Rock	175,036
Catalina	116,168

Source: Arizona State Parks



Source: Arizona State Parks



ARIZONA STATE PARKS VISITATION

	2002	2001	% Change
All Parks	2,281,358	2,540,504	-10.2%
Alamo Lake	71,762	78,136	-8.2%
Boyce Thompson	84,944	89,418	-5.0%
Buckskin Mountain	93,867	92,804	1.1%
Catalina	116,168	146,019	-20.4%
Cattail Cove	109,645	109,049	0.5%
Dead Horse Ranch	103,215	107,577	-4.1%
Fool Hollow Lake	63,083	91,272	-30.9%
Fort Verde	17,007	20,425	-16.7%
Homolovi	20,358	21,351	-4.7%
Jerome	54,440	23,476	131.9%
Kartchner Caverns	191,661	192,289	-0.3%
Lake Havasu	407,759	373,709	9.1%
Lost Dutchman	76,664	110,314	-30.5%
Lyman Lake	23,153	29,600	-21.8%
McFarland	3,542	4,123	-14.1%
Oracle	10,239	6,064	68.8%
Patagonia Lake	207,235	216,882	-4.4%
Picacho Peak	60,575	120,663	-49.8%
Red Rock	78,437	68,654	14.2%
Riordan Mansion	23,432	20,840	12.4%
Roper Lake	44,601	61,044	-26.9%
San Rafael	0	0	
Slide Rock	175,036	280,644	-37.6%
Tombstone Courthouse	63,935	74,519	-14.2%
Tonto Natural Bridge	85,751	103,062	-16.8%
Tubac Presidio	19,200	19,193	0.0%
Yuma Crossing	14,116	16,319	-13.5%
Yuma Prison	61,533	63,058	-2.4%

Source: Arizona State Parks



ARIZONA NATIONAL PARKS VISITATION

In 2002, Arizona's 21 National Parks continued to suffer from the effects of a slowing economy and the attacks on September 11. Total National Park visitation was down 6.7% from 2001 levels. In fact, only three parks exceeded 2001 levels, Navajo, Pipe Spring, and Walnut Canyon.

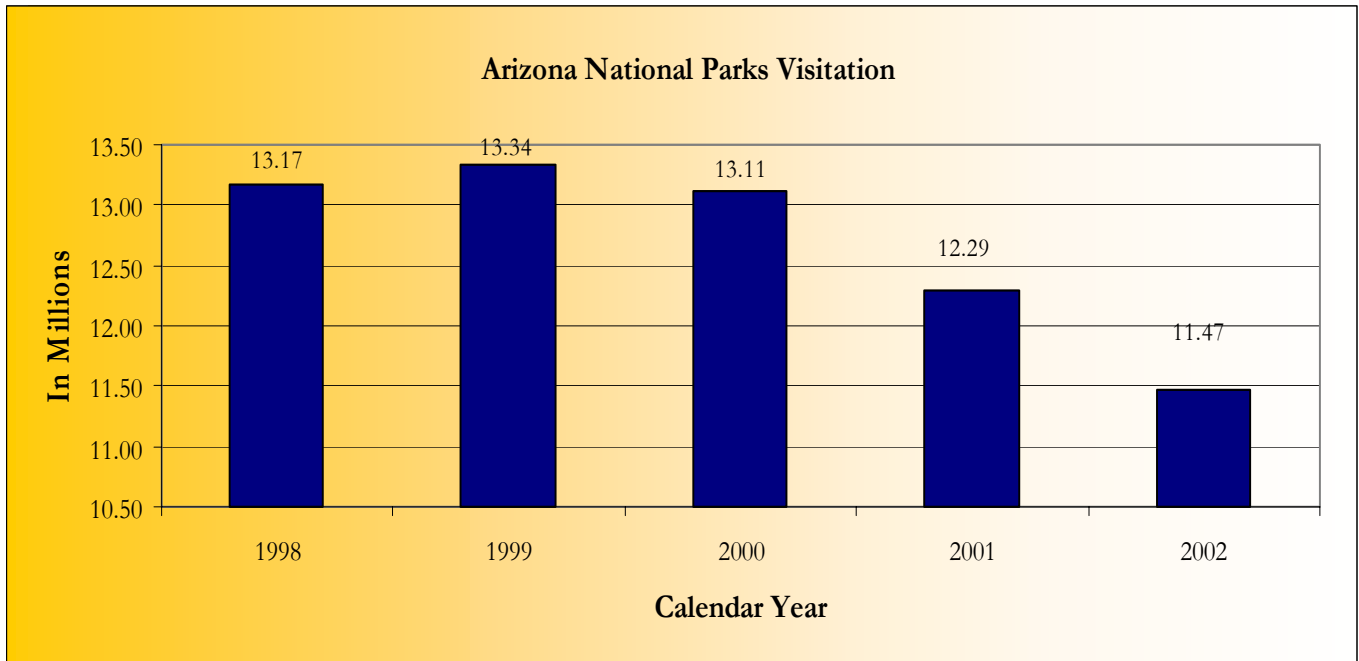
The most drastic decrease in visitation occurred at Casa Grande National Monument, down 35.6% from 2001 levels. Tonto National Monument suffered a loss of 28.3%, most likely a result of the devastating wild fires that swept the White Mountains region.

National Park visitation totaled 11,444,671 visitors in 2002 compared to 12,298,219 visitors in 2001.

National Park	2002
Grand Canyon NP	3,997,236
Lake Mead NRA	1,698,828
Glen Canyon NRA	1,610,334
Canyon de Chelly NM	772,620
Montezuma Castle NM	643,645

Source: National Park Service

“THREE PARKS EXCEEDED 2001 LEVELS, NAVAJO, PIPE SPRING, AND WALNUT CANYON.”



Source: National Parks Service



ARIZONA NATIONAL PARKS VISITATION

	2002	2001	% Change
All Arizona Parks	11,444,671	12,298,219	-6.7%
Canyon de Chelly NM	772,620	833,202	-7.3%
Casa Grande NM	85,375	132,630	-35.6%
Chiricahua NM	66,514	75,824	-12.3%
Coronado NM	87,311	89,235	-2.2%
Fort Bowie NHS	8,290	8,858	-6.4%
Glen Canyon NRA**	1,610,334	1,830,095	-12.0%
Grand Canyon NP	3,997,236	4,070,029	-1.8%
Hubbell Trading Post NHS	196,874	205,212	-4.1%
Lake Mead NRA**	1,698,828	1,849,816	-8.2%
Montezuma Castle NM	643,645	710,586	-9.4%
Navajo NM	67,254	57,065	17.9%
Organ Pipe Cactus NM	294,434	327,738	-10.5%
Petrified Forest NP	571,585	584,846	-2.3%
Pipe Spring NM	54,746	52,003	5.3%
Saguaro NP	577,672	722,101	-20.0%
Sunset Crater Volcano NM	150,664	159,523	-5.6%
Tonto NM	57,328	80,008	-28.3%
Tumacacori NHP	48,438	49,570	-2.3%
Tuzigoot NM	112,167	116,323	-3.6%
Walnut Canyon NM	106,962	102,839	4.0%
Wupatki NM	236,394	239,476	-1.3%

**These visitation numbers are for Arizona Visitors only

Source: National Parks Service



DOMESTIC OVERNIGHT VISITATION

All domestic overnight visitation information was gathered by D.K. Shifflet and Associates by using a mail panel that is stratified to match the census. 45,000 questionnaires are mailed monthly and the returned sample is re-balanced demographically.

In 2002, Arizona hosted 26.9 million domestic overnight visitors, down only 0.9 percent from 2001 when Arizona hosted 27.1 million domestic overnight visitors. U.S. domestic overnight travel volume increased slightly, up 0.9 percent.

The slight decline in person-trip

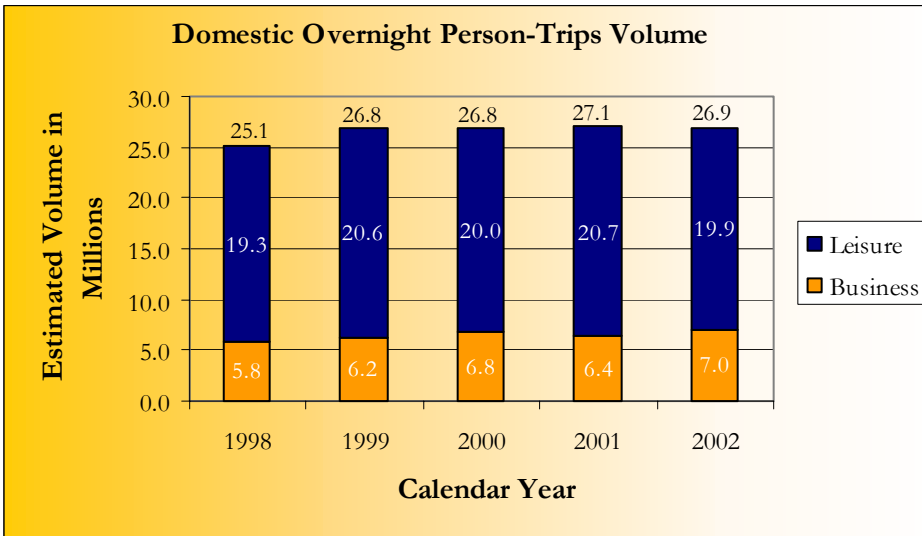
volume was the result of the 3.9 percent decline in the domestic overnight leisure segment, from 20.7 million in 2001 to 19.9 million in 2002. Conversely, the U.S. domestic overnight leisure travel segment increased by 1.8 percent.

In addition, the 0.9 percent decline in total domestic overnight travel volume was the result of the decline in domestic overnight resident travel, down 20.2 percent from 8.1 million in 2001 to 6.5 million in 2002.

Domestic overnight business person-trip volume increased by 8.7 percent, from 6.4 million in 2001 to 7.0 million in 2002. The U.S. domestic overnight business travel segment declined by 1.9 percent.

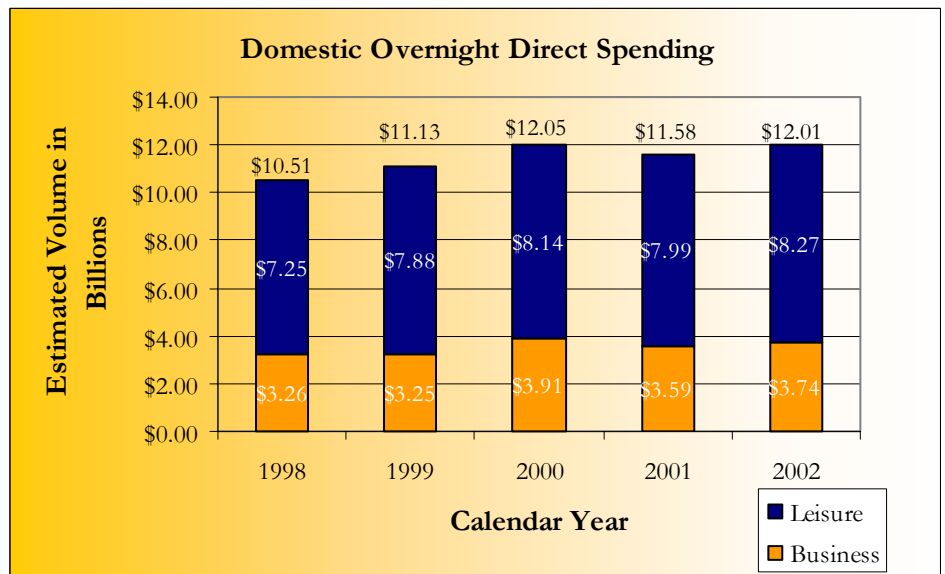
Domestic overnight non-resident travel volume rose 7.3 percent, from 19.0 million in 2001 to 20.4 million in 2002.

From 2001 to 2002, average party size among total domestic overnight travelers dropped 7.3 percent, from 2.6 persons per trip to 2.4 persons per trip. Domestic overnight business average party size fell by 9.0 percent, domestic overnight leisure fell by 4.3 percent.



Direct spending among domestic overnight travelers rose 3.7 percent, from \$11.58 billion in 2001 to \$12.01 billion in 2002. This increase was the result of the 0.6 percent increase in visitor-days, as well as the 3.0 percent increase in average per person per day expenditures.

The average domestic overnight visitor spent \$108 per person per day in 2002, up from \$105 in 2001. Domestic overnight business travelers spent the most per person per day, although this spending level declined from \$147 in 2001 to \$140 in 2002. Domestic overnight leisure travelers spent an average of \$98 per person per day in 2002, up from \$93 in 2001.



Source: D.K. Shifflet and Associates, Ltd.



TOTAL DOMESTIC OVERNIGHT VISITOR PROFILE

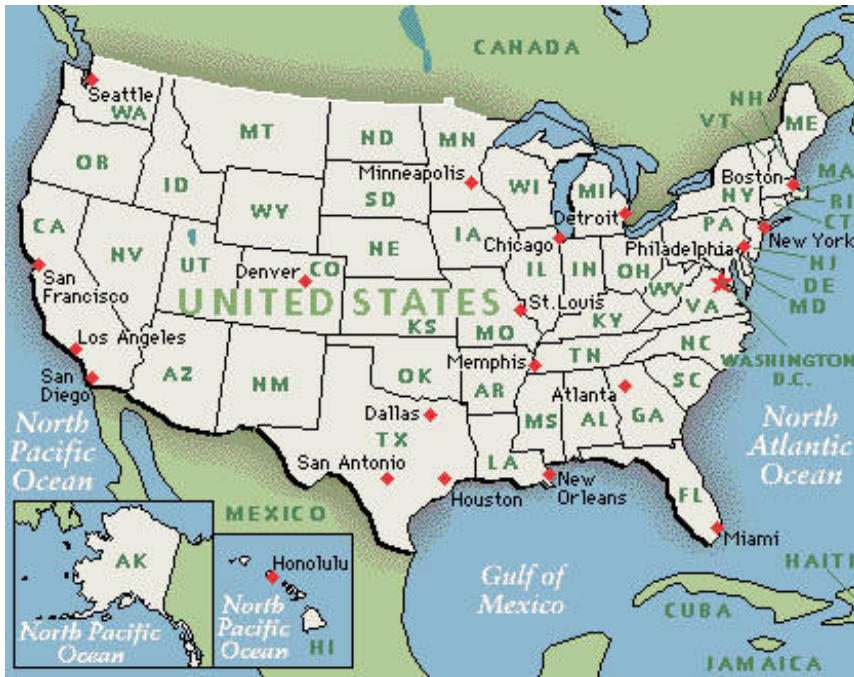
2002 Quick Facts: Visitor Profile	
Estimated Volume	26.9 Million
Average Length of Stay	4.1 days
Average Party Size	2.4
Spending Per Person Per Day	\$108.49
Total Direct Spending	\$12.01 Billion

In 2002, nearly 62 percent of domestic overnight visitors to Arizona originated from southwestern U.S. states. Top origin markets for domestic overnight visitors to Arizona include Southern California and Arizona itself.

Domestic overnight travel party volume in Arizona rose 6.9 percent, from 10.4 million in 2001 to 11.1 million in

2002.

There were no declines in average stay length across Arizona's domestic overnight segments from 2001 to 2002. Despite rebounding somewhat after a decline from 2000 to 2001, Arizona's average stay length in 2002 are still below those of 2000.



Origin State	
California	27.8%
Arizona	24.3%
Texas	6.3%
New Mexico	3.5%
Illinois	3.4%

Origin DMA	
Phoenix	17.4%
Los Angeles	14.2%
Tucson (Sierra Vista)	6.5%
San Diego	5.7%
Albuquerque	3.3%

Demographics:

Household Income	
Average HHI Income	\$73,000
<\$25,000	12.0%
\$25K-\$49,999	22.0%
\$50K-\$74,999	20.0%
\$75,000+	46.0%

Education	
No College	24.0%
Attended College	30.0%
College Grad.	25.0%
Post-Grad. Degree	21.0%

Life Stage	
18-34/No children	14.0%
18-34/Children	18.0%
35-54/No children	20.0%
35-54/Children/<\$50K	6.0%
35-54/Children/\$50K+	19.0%
55+/No children/<\$50K	8.0%
55+/No children/\$50K+	15.0%

Age	
Average (years)	44.0
18-34 years	32.0%
35-54 years	44.0%
55+ years	24.0%

Occupation	
Manager, Prof.	40.0%
Tech., Sales, Admin.	19.0%
Service	6.0%
Other	14.0%
Retired	11.0%
Not Employed	11.0%

Source: D.K. Shifflet and Associates, Ltd.



TOTAL DOMESTIC OVERNIGHT VISITOR PROFILE

Trip Behaviors:

Purpose of Stay	
Business	26.0%
Leisure	74.0%

Accommodations	
Non-Paid (Net)	38.0%
Hotel	50.0%
Paid non/hotel	8.0%
Other	3.0%

Transportation	
Auto	58.0%
Air	32.0%
Other	10.0%

Length of Stay	
Average	4.1
1-3 Nights	69.0%
4-7 Nights	24.0%
8+ Nights	7.0%

Quarter of Travel	
Quarter 1	28.0%
Quarter 2	25.0%
Quarter 3	24.0%
Quarter 4	23.0%

Trip Distance	
Average Distance	770
Under 100 Miles	2.0%
101-300 Miles	27.0%
301-500 Miles	22.0%
501-700 Miles	11.0%
701-1,000 Miles	6.0%
Over 1,000 Miles	32.0%

Expenditures	
Average (per person per day)	\$108.49
Shopping	\$14.30
Transportation	\$38.80
Food	\$23.30
Room	\$22.80
Entertainment	\$13.50
Other	\$4.70

Reservation Type	
Accommodation	
No Reservation	38.0%
Reservation	62.0%
Direct to Location	14.0%
Toll-Free Number	16.0%
Computer/Internet	11.0%
Corporate Travel	6.0%
Other	13.0%
Travel Agent	3.0%

Reservation Type	
Transportation	
No Reservation	36.0%
Reservation	64.0%
Toll-Free Number	16.0%
Computer/Internet	22.0%
Corporate Travel	8.0%
Other	13.0%
Travel Agent	5.0%

Party Composition	
Avg. Party Size	2.4
One Adult	34.0%
MM/FF	6.0%
3+ Adults	11.0%
Couples	30.0%
Families	19.0%

Activities	
General Spending (Net)	81.0%
Dining	33.0%
Shopping	24.0%
Entertainment	24.0%
Outdoor Sports (Net)	23.0%
Adventure Sports	1.0%
Hike/Bike	9.0%
Hunt/Fish	3.0%
Golf	7.0%
Boat/Sail	3.0%
Nature (Net)	31.0%
Camping	6.0%
National/State Parks	16.0%
Beach/Waterfront	2.0%
Eco-Travel	7.0%
Sightseeing (Net)	38.0%
Sightseeing	33.0%
Group Tour	5.0%
Attractions (Net)	22.0%
Theme Park	2.0%
Sporting Event	7.0%
Night Life	6.0%
Gamble	6.0%
Shows	1.0%
Culture (Net)	21.0%
Historic Site	10.0%
Concert/Play/Dance	2.0%
Museum/ Art Exhibit	5.0%
Festival/Craft Fair	4.0%

Satisfaction	
Average	7.8
8-10 Excellent	65.0%
4-7 Fair/Good	32.0%
1-3 Poor	4.0%

Value	
Average	7.6
8-10 Excellent	60.0%
4-7 Fair/Good	36.0%
1-3 Poor	4.0%

Source: D.K. Shifflet and Associates, Ltd.



TOTAL DOMESTIC OVERNIGHT RESIDENT VISITOR PROFILE

2002 Quick Facts: Visitor Profile	
Estimated Volume	6.5 Million
Average Length of Stay	2.9 days
Average Party Size	2.5
Spending Per Person Per Day	\$74.33
Total Direct Spending	\$1.39 Billion

The 0.9 percent decline in total domestic overnight travel volume was partially the result of the decline in domestic overnight resident travel, down 20.2 percent from 8.1 million in 2001 to 6.5 million in 2002.

The average party size among resident travelers was especially high in 2001 at 2.9. In 2002, the average party size was 2.5 people and in 2000, the average party size was 2.6 people.



Direct spending by domestic overnight resident travelers decreased 19.2 percent. This decline occurred as a result of declines in both visitor-days, down 18.0 percent, and spending per person per day, down 1.5 percent. Spending by overnight residents remained almost unchanged, down 1.5 percent from \$75 in 2001 to \$74 in 2002.

Origin DMA	
Phoenix	71.6%
Tucson (Sierra Vista)	26.6%
Yuma — El Centro	1.8%

Demographics:

Household Income	
Average HHI Income	\$59,000
<\$25,000	17.0%
\$25K-\$49,999	32.0%
\$50K-\$74,999	18.0%
\$75,000+	34.0%

Education	
No College	19.0%
Attended College	34.0%
College Grad.	29.0%
Post-Grad. Degree	18.0%

Life Stage	
18-34/No children	13.0%
18-34/Children	23.0%
35-54/No children	19.0%
35-54/Children/<\$50K	8.0%
35-54/Children/\$50K+	16.0%
55+/No children/<\$50K	10.0%
55+/No children/\$50K+	10.0%

Age	
Average (years)	43.0
18-34 years	36.0%
35-54 years	44.0%
55+ years	20.0%

Occupation	
Manager, Prof.	28.0%
Tech., Sales, Admin.	19.0%
Service	9.0%
Other	18.0%
Retired	11.0%
Not Employed	14.0%

Source: D.K. Shifflet and Associates, Ltd.



TOTAL DOMESTIC OVERNIGHT RESIDENT VISITOR PROFILE

Trip Behaviors:

Purpose of Stay	
Business	36.0%
Leisure	64.0%

Accommodations	
Non-Paid (Net)	31.0%
Hotel	52.0%
Paid non/hotel	12.0%
Other	5.0%

Transportation	
Auto	86.0%
Air	2.0%
Other	12.0%

Length of Stay	
Average	2.9
1-3 Nights	91.0%
4-7 Nights	8.0%
8+ Nights	1.0%

Quarter of Travel	
Quarter 1	26.0%
Quarter 2	27.0%
Quarter 3	31.0%
Quarter 4	16.0%

Trip Distance	
Average Distance	197
Under 100 Miles	10.0%
101-300 Miles	83.0%
301-500 Miles	7.0%
501-700 Miles	0.0%
701-1,000 Miles	0.0%
Over 1,000 Miles	0.0%

Expenditures	
Average (per person per day)	\$74.33
Shopping	\$10.60
Transportation	\$12.30
Food	\$20.10
Room	\$26.50
Entertainment	\$10.80
Other	\$4.20

Reservation Type	
Accommodation	
No Reservation	37.0%
Reservation	63.0%
Direct to Location	14.0%
Toll-Free Number	14.0%
Computer/Internet	9.0%
Corporate Travel	8.0%
Other	16.0%
Travel Agent	1.0%

Reservation Type	
Transportation	
No Reservation	35.0%
Reservation	65.0%
Toll-Free Number	17.0%
Computer/Internet	11.0%
Corporate Travel	13.0%
Other	24.0%
Travel Agent	1.0%

Party Composition	
Avg. Party Size	2.5
One Adult	38.0%
MM/FF	3.0%
3+ Adults	13.0%
Couples	26.0%
Families	20.0%

Activities	
General Spending (Net)	46.0%
Dining	20.0%
Shopping	13.0%
Entertainment	13.0%
Outdoor Sports (Net)	22.0%
Adventure Sports	1.0%
Hike/Bike	7.0%
Hunt/Fish	6.0%
Golf	6.0%
Boat/Sail	2.0%
Nature (Net)	29.0%
Camping	9.0%
National/State Parks	10.0%
Beach/Waterfront	2.0%
Eco-Travel	8.0%
Sightseeing (Net)	22.0%
Sightseeing	18.0%
Group Tour	4.0%
Attractions (Net)	14.0%
Sporting Event	5.0%
Night Life	3.0%
Gamble	5.0%
Shows	1.0%
Culture (Net)	15.0%
Historic Site	5.0%
Concert/Play/Dance	1.0%
Museum/Art Exhibit	3.0%
Festival/Craft Fair	6.0%

Satisfaction	
Average	7.5
8-10 Excellent	64.0%
4-7 Fair/Good	29.0%
1-3 Poor	7.0%

Value	
Average	7.4
8-10 Excellent	58.0%
4-7 Fair/Good	35.0%
1-3 Poor	7.0%

Source: D.K. Shifflet and Associates, Ltd.



TOTAL DOMESTIC OVERNIGHT NON-RESIDENT VISITOR PROFILE

2002 Quick Facts: Visitor Profile	
Estimated Volume	20.4 Million
Average Length of Stay	4.5 days
Average Party Size	2.4
Spending Per Person Per Day	\$115.43
Total Direct Spending	\$10.62 Billion

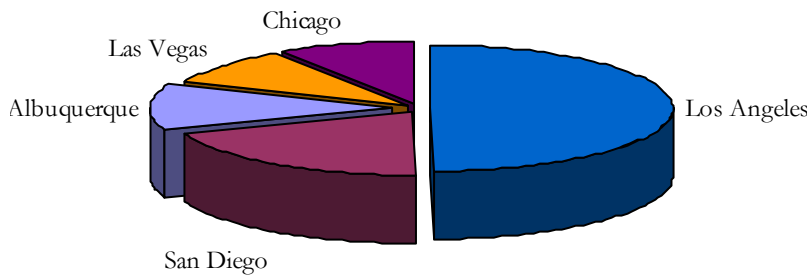
Regional visitation was strong in 2002, representing more than 53 percent of domestic overnight visitation. Non-regional travelers also visited Arizona, from Chicago, Illinois, for example.

Spending by domestic overnight

non-residents remained relatively stable, with a slight increase from \$113 in 2001 to \$115 in 2002.

In 2002, domestic overnight non-resident travel volume rose 7.3 percent, from 19.0 million in 2001 to 20.4 million in 2002. The 0.6 percent increase in total domestic overnight visitor days was also driven by the increase in overnight non-resident visitor days, up 5.5 percent from 87.2 million in 2001 to 92.0 million in 2002.

Top 5 Origin DMA's



Yuma, AZ

Origin State	
California	36.7%
Texas	8.3%
New Mexico	4.6%
Illinois	4.4%
Nevada	3.9%

Origin DMA	
Los Angeles	18.8%
San Diego	7.5%
Albuquerque	4.4%
Las Vegas	3.6%
Chicago	3.5%

Demographics:

Household Income	
Average HHI Income	\$77,000
<\$25,000	10.0%
\$25K-\$49,999	19.0%
\$50K-\$74,999	21.0%
\$75,000+	50.0%

Education	
No College	26.0%
Attended College	29.0%
College Grad.	23.0%
Post-Grad. Degree	22.0%

Life Stage	
18-34/No children	14.0%
18-34/Children	17.0%
35-54/No children	20.0%
35-54/Children/<\$50K	5.0%
35-54/Children/\$50K+	19.0%
55+/No children/<\$50K	8.0%
55+/No children/\$50K+	16.0%

Age	
Average (years)	44.0
18-34 years	31.0%
35-54 years	44.0%
55+ years	25.0%

Occupation	
Manager, Prof.	44.0%
Tech., Sales, Admin.	18.0%
Service	5.0%
Other	12.0%
Retired	11.0%
Not Employed	10.0%

Source: D.K. Shifflet and Associates, Ltd.



TOTAL DOMESTIC OVERNIGHT NON-RESIDENT VISITOR PROFILE

Trip Behaviors:

Purpose of Stay	
Business	23.0%
Leisure	77.0%

Accommodations	
Non-Paid (Net)	41.0%
Hotel	49.0%
Paid non/hotel	7.0%
Other	3.0%

Transportation	
Auto	49.0%
Air	42.0%
Other	9.0%

Length of Stay	
Average	4.5
1-3 Nights	62.0%
4-7 Nights	29.0%
8+ Nights	8.0%

Quarter of Travel	
Quarter 1	28.0%
Quarter 2	25.0%
Quarter 3	21.0%
Quarter 4	26.0%

Trip Distance	
Average Distance	953
Under 100 Miles	0.0%
101-300 Miles	9.0%
301-500 Miles	27.0%
501-700 Miles	14.0%
701-1,000 Miles	8.0%
Over 1,000 Miles	42.0%

Expenditures	
Average (per person per day)	\$115.43
Shopping	\$15.00
Transportation	\$43.70
Food	\$23.90
Room	\$22.10
Entertainment	\$13.90
Other	\$4.80

Reservation Type	
Accommodation	
No Reservation	38.0%
Reservation	62.0%
Direct to Location	16.0%
Toll-Free Number	14.0%
Computer/Internet	12.0%
Corporate Travel	6.0%
Other	11.0%
Travel Agent	4.0%

Reservation Type	
Transportation	
No Reservation	36.0%
Reservation	64.0%
Toll-Free Number	16.0%
Computer/Internet	24.0%
Corporate Travel	6.0%
Other	11.0%
Travel Agent	6.0%

Party Composition	
Avg. Party Size	2.4
One Adult	33.0%
MM/FF	7.0%
3+ Adults	10.0%
Couples	31.0%
Families	19.0%

Activities	
General Spending (Net)	92.0%
Dining	37.0%
Shopping	27.0%
Entertainment	28.0%
Outdoor Sports (Net)	24.0%
Adventure Sports	1.0%
Hike/Bike	10.0%
Hunt/Fish	2.0%
Golf	7.0%
Boat/Sail	4.0%
Nature (Net)	33.0%
Camping	5.0%
National/State Parks	19.0%
Beach/Waterfront	2.0%
Eco-Travel	7.0%
Sightseeing (Net)	42.0%
Sightseeing	37.0%
Group Tour	5.0%
Attractions (Net)	24.0%
Theme Park	3.0%
Sporting Event	7.0%
Night Life	7.0%
Gamble	6.0%
Shows	1.0%
Culture (Net)	22.0%
Historic Site	11.0%
Concert/Play/Dance	3.0%
Museum/ Art Exhibit	5.0%
Festival/Craft Fair	3.0%

Satisfaction	
Average	7.9
8-10 Excellent	65.0%
4-7 Fair/Good	32.0%
1-3 Poor	3.0%

Value	
Average	7.7
8-10 Excellent	60.0%
4-7 Fair/Good	37.0%
1-3 Poor	3.0%

Source: D.K. Shifflet and Associates, Ltd.



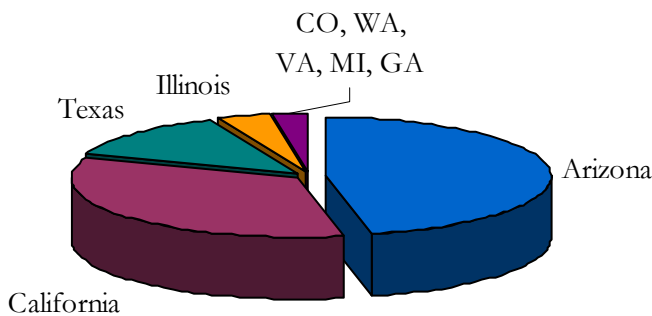
TOTAL DOMESTIC OVERNIGHT BUSINESS VISITOR PROFILE

2002 Quick Facts: Visitor Profile	
Estimated Volume	7.0 Million
Average Length of Stay	3.8 days
Average Party Size	1.9
Spending Per Person Per Day	\$140.07
Total Direct Spending	\$3.74 Billion

Both regional markets and longer haul markets were sources for domestic overnight business travelers to Arizona in 2002, with five states contributing equal numbers of business travelers. Top origin cities were mostly in-state, which contributed 35 percent of business travelers.

Domestic overnight business person-trip volume rose 8.7 percent, from 6.4 million in 2001 to 7.0 million in 2002. The U.S. domestic overnight business travel segment declined by 1.9 percent. Domestic overnight business travelers spent the most per person per day, although, this spending level declined from \$147 in 2001 to \$140 in 2002.

Top 5 Origin States



Paria Canyon, Northern AZ

Origin State	
Arizona	32.8%
California	23.8%
Texas	9.2%
Illinois	2.6%
CO,WA,VA,MI,GA	1.8%

Origin DMA	
Phoenix	23.0%
Los Angeles	15.0%
Tucson (Sierra Vista)	9.3%
Yuma — El Centro	3.5%
San Diego	3.3%

Demographics:

Household Income	
Average HHI Income	\$77,000
<\$25,000	10.0%
\$25K-\$49,999	25.0%
\$50K-\$74,999	15.0%
\$75,000+	50.0%

Education	
No College	27.0%
Attended College	28.0%
College Grad.	23.0%
Post-Grad. Degree	22.0%

Life Stage	
18-34/No children	15.0%
18-34/Children	17.0%
35-54/No children	25.0%
35-54/Children/<\$50K	10.0%
35-54/Children/\$50K+	16.0%
55+/No children/<\$50K	5.0%
55+/No children/\$50K+	11.0%

Age	
Average (years)	43.0
18-34 years	32.0%
35-54 years	51.0%
55+ years	17.0%

Occupation	
Manager, Prof.	43.0%
Tech., Sales, Admin.	19.0%
Service	5.0%
Other	21.0%
Retired	6.0%
Not Employed	6.0%

Source: D.K. Shifflet and Associates, Ltd.



TOTAL DOMESTIC OVERNIGHT BUSINESS VISITOR PROFILE

Trip Behaviors:

Accommodations	
Non-Paid (Net)	17.0%
Hotel	71.0%
Paid non/hotel	3.0%
Other	9.0%

Transportation	
Auto	50.0%
Air	38.0%
Other	12.0%

Length of Stay	
Average	3.8
1-3 Nights	74.0%
4-7 Nights	21.0%
8+ Nights	5.0%

Quarter of Travel	
Quarter 1	30.0%
Quarter 2	25.0%
Quarter 3	24.0%
Quarter 4	21.0%

Trip Distance	
Average Distance	726
Under 100 Miles	3.0%
101-300 Miles	34.0%
301-500 Miles	21.0%
501-700 Miles	6.0%
701-1,000 Miles	6.0%
Over 1,000 Miles	30.0%

Expenditures	
Average (per person per day)	\$140.07
Shopping	\$111.10
Transportation	\$54.30
Food	\$24.00
Room	\$49.40
Entertainment	\$10.20
Other	\$6.80

Reservation Type	
Accommodation	
No Reservation	21.0%
Reservation	79.0%
Direct to Location	14.0%
Toll-Free Number	16.0%
Computer/Internet	11.0%
Corporate Travel	21.0%
Other	15.0%
Travel Agent	3.0%

Reservation Type	
Transportation	
No Reservation	27.0%
Reservation	73.0%
Toll-Free Number	15.0%
Computer/Internet	16.0%
Corporate Travel	20.0%
Other	18.0%
Travel Agent	4.0%

Party Composition	
Avg. Party Size	1.9
One Adult	58.0%
MM/FF	5.0%
3+ Adults	12.0%
Couples	18.0%
Families	6.0%

Activities	
General Spending (Net)	68.0%
Dining	32.0%
Shopping	18.0%
Entertainment	18.0%
Outdoor Sports (Net)	17.0%
Adventure Sports	1.0%
Hike/Bike	6.0%
Hunt/Fish	1.0%
Golf	7.0%
Boat/Sail	2.0%
Nature (Net)	15.0%
Camping	2.0%
National/State Parks	8.0%
Beach/Waterfront	1.0%
Eco-Travel	4.0%
Sightseeing (Net)	21.0%
Sightseeing	16.0%
Group Tour	5.0%
Attractions (Net)	18.0%
Sporting Event	3.0%
Night Life	10.0%
Gamble	4.0%
Shows	1.0%
Culture (Net)	13.0%
Historic Site	7.0%
Concert/Play/Dance	2.0%
Museum/Art Exhibit	2.0%
Festival/Craft Fair	2.0%

Satisfaction	
Average	7.4
8-10 Excellent	58.0%
4-7 Fair/Good	37.0%
1-3 Poor	5.0%

Value	
Average	7.2
8-10 Excellent	55.0%
4-7 Fair/Good	40.0%
1-3 Poor	6.0%

Source: D.K. Shifflet and Associates, Ltd.



TOTAL DOMESTIC OVERNIGHT LEISURE VISITOR PROFILE

2002 Quick Facts: Visitor Profile	
Estimated Volume	19.9 Million
Average Length of Stay	4.2 days
Average Party Size	2.7
Spending Per Person Per Day	\$98.45
Total Direct Spending	\$8.27 Billion

The slight decline in person-trip volume was the result of the 3.9 percent decline in the domestic overnight leisure travel segment, from 20.7 million in 2001 to 19.9 million in 2002. Conversely, the U.S. domestic overnight leisure travel segment increased by 1.8 percent.

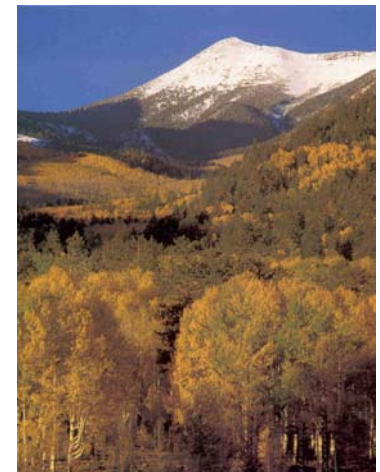
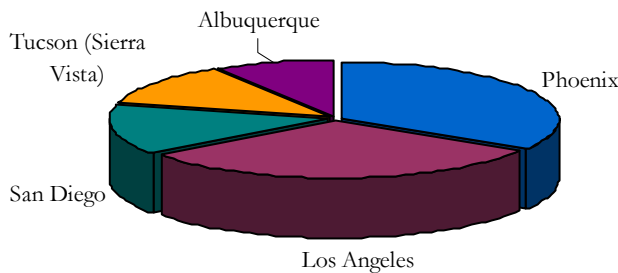
Domestic overnight leisure

travelers spent an average of \$98 per person per day in Arizona in 2002, up from \$93 in 2001.

The most popular activities among domestic overnight leisure travelers to Arizona were sightseeing, dining, entertainment, shopping, and visiting national/state parks.

Nearly 30 percent of Arizona's domestic overnight leisure visitors arrived by air in 2002, up 6 percentage points from 2001. Interestingly, Arizona's domestic overnight leisure travelers chose air travel almost as often as did Arizona's domestic overnight business travelers.

Top 5 Origin DMA's



Flagstaff, AZ

Origin State	
California	29.2%
Arizona	21.2%
Texas	5.2%
New Mexico	4.3%
Nevada	3.8%

Origin DMA	
Phoenix	15.4%
Los Angeles	13.9%
San Diego	6.5%
Tucson (Sierra Vista)	5.5%
Albuquerque	4.0%

Demographics:

Household Income	
Average HHI Income	\$71,000
<\$25,000	13.0%
\$25K-\$49,999	21.0%
\$50K-\$74,999	22.0%
\$75,000+	45.0%

Education	
No College	24.0%
Attended College	31.0%
College Grad.	25.0%
Post-Grad. Degree	21.0%

Life Stage	
18-34/No children	14.0%
18-34/Children	19.0%
35-54/No children	18.0%
35-54/Children/<\$50K	4.0%
35-54/Children/\$50K+	20.0%
55+/No children/<\$50K	9.0%
55+/No children/\$50K+	16.0%

Age	
Average (years)	45.0
18-34 years	32.0%
35-54 years	41.0%
55+ years	26.0%

Occupation	
Manager, Prof.	39.0%
Tech., Sales, Admin.	19.0%
Service	6.0%
Other	11.0%
Retired	13.0%
Not Employed	13.0%

Source: D.K. Shifflet and Associates, Ltd.



TOTAL DOMESTIC OVERNIGHT LEISURE VISITOR PROFILE

Trip Behaviors:

Accommodations	
Non-Paid (Net)	46.0%
Hotel	42.0%
Paid non/hotel	10.0%
Other	1.0%

Transportation	
Auto	61.0%
Air	30.0%
Other	9.0%

Length of Stay	
Average	4.2
1-3 Nights	68.0%
4-7 Nights	25.0%
8+ Nights	7.0%

Quarter of Travel	
Quarter 1	27.0%
Quarter 2	26.0%
Quarter 3	23.0%
Quarter 4	24.0%

Trip Distance	
Average Distance	786
Under 100 Miles	2.0%
101-300 Miles	25.0%
301-500 Miles	23.0%
501-700 Miles	12.0%
701-1,000 Miles	6.0%
Over 1,000 Miles	33.0%

Expenditures	
Average (per person per day)	\$98.45
Shopping	\$15.30
Transportation	\$33.80
Food	\$23.00
Room	\$14.20
Entertainment	\$14.50
Other	\$4.10

Reservation Type	
Accommodation	
No Reservation	44.0%
Reservation	56.0%
Direct to Location	14.0%
Toll-Free Number	15.0%
Computer/Internet	11.0%
Corporate Travel	1.0%
Other	12.0%
Travel Agent	3.0%

Reservation Type	
Transportation	
No Reservation	40.0%
Reservation	60.0%
Toll-Free Number	17.0%
Computer/Internet	24.0%
Corporate Travel	2.0%
Other	11.0%
Travel Agent	6.0%

Party Composition	
Avg. Party Size	2.7
One Adult	21.0%
MM/FF	6.0%
3+ Adults	10.0%
Couples	36.0%
Families	26.0%

Activities	
General Spending (Net)	86.0%
Dining	33.0%
Shopping	26.0%
Entertainment	27.0%
Outdoor Sports (Net)	27.0%
Adventure Sports	2.0%
Hike/Bike	11.0%
Hunt/Fish	3.0%
Golf	7.0%
Boat/Sail	4.0%
Nature (Net)	37.0%
Camping	7.0%
National/State Parks	20.0%
Beach/Waterfront	2.0%
Eco-Travel	8.0%
Sightseeing (Net)	44.0%
Sightseeing	39.0%
Group Tour	5.0%
Attractions (Net)	24.0%
Theme Park	3.0%
Sporting Event	8.0%
Night Life	5.0%
Gamble	7.0%
Shows	1.0%
Culture (Net)	23.0%
Historic Site	11.0%
Concert/Play/Dance	2.0%
Museum/Art Exhibit	6.0%
Festival/Craft Fair	4.0%

Satisfaction	
Average	7.9
8-10 Excellent	67.0%
4-7 Fair/Good	30.0%
1-3 Poor	3.0%

Value	
Average	7.8%
8-10 Excellent	62.0%
4-7 Fair/Good	35.0%
1-3 Poor	3.0%

Source: D.K. Shifflet and Associates, Ltd.



TOTAL DOMESTIC OVERNIGHT RESIDENT LEISURE VISITOR PROFILE

2002 Quick Facts: Visitor Profile	
Estimated Volume	4.2 Million
Average Length of Stay	2.9 days
Average Party Size	3.0
Spending Per Person Per Day	\$70.73
Total Direct Spending	\$0.87 Billion

Arizona's domestic overnight resident leisure travel segment is mostly comprised of family travelers. In fact, families represent 35 percent of travel parties in 2002.

Domestic overnight resident leisure visitors' length of stay rose, from 2.8 days in 2001 to 2.9 days in 2002.

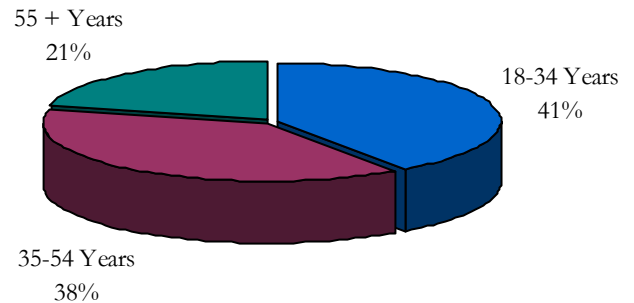
Origin DMA	
Phoenix	72.4%
Tucson (Sierra Vista)	25.7%
Yuma — El Centro	1.9%

In 2002, 38 percent of Arizona's domestic overnight resident leisure travelers stayed in hotels/motels. An additional 35 percent stayed in private homes.



Las Sendas Golf Course

Age of Visitor



Demographics:

Household Income	
Average HHI Income	\$57,000
<\$25,000	22.0%
\$25K-\$49,999	25.0%
\$50K-\$74,999	21.0%
\$75,000+	32.0%

Education	
No College	19.0%
Attended College	32.0%
College Grad.	31.0%
Post-Grad. Degree	18.0%

Life Stage	
18-34/No children	11.0%
18-34/Children	29.0%
35-54/No children	13.0%
35-54/Children/<\$50K	4.0%
35-54/Children/\$50K+	21.0%
55+/No children/<\$50K	9.0%
55+/No children/\$50K+	11.0%

Age	
Average (years)	42.0
18-34 years	41.0%
35-54 years	38.0%
55+ years	21.0%

Occupation	
Manager, Prof.	27.0%
Tech., Sales, Admin.	21.0%
Service	7.0%
Other	16.0%
Retired	11.0%
Not Employed	18.0%

Source: D.K. Shifflet and Associates, Ltd.



TOTAL DOMESTIC OVERNIGHT RESIDENT LEISURE VISITOR PROFILE

Trip Behaviors:

Accommodations	
Non-Paid (Net)	44.0%
Hotel	38.0%
Paid non/hotel	17.0%
Other	2.0%

Transportation	
Auto	87.0%
Air	2.0%
Other	11.0%

Length of Stay	
Average	2.9
1-3 Nights	91.0%
4-7 Nights	8.0%
8+ Nights	1.0%

Quarter of Travel	
Quarter 1	20.0%
Quarter 2	30.0%
Quarter 3	32.0%
Quarter 4	18.0%

Trip Distance	
Average Distance	205
Under 100 Miles	10.0%
101-300 Miles	82.0%
301-500 Miles	9.0%
501-700 Miles	0.0%
701-1,000 Miles	0%
Over 1,000 Miles	0%

Expenditures	
Average (per person per day)	\$70.73
Shopping	\$11.50
Transportation	\$11.50
Food	\$21.30
Room	\$15.30
Entertainment	\$13.20
Other	\$3.50

Reservation Type	
Accommodation	
No Reservation	50.0%
Reservation	50.0%
Direct to Location	14.0%
Toll-Free Number	14.0%
Computer/Internet	9.0%
Corporate Travel	10.0%
Other	1.0%

Reservation Type	
Transportation	
No Reservation	56.0%
Reservation	44.0%
Toll-Free Number	16.0%
Computer/Internet	11.0%
Corporate Travel	1.0%
Other	15.0%
Travel Agent	1.0%

Party Composition	
Avg. Party Size	3.0
One Adult	18.0%
MM/FF	3.0%
3+ Adults	10.0%
Couples	32.0%
Families	35.0%

Activities	
General Spending (Net)	51.0%
Dining	21.0%
Shopping	14.0%
Entertainment	16.0%
Outdoor Sports (Net)	25.0%
Adventure Sports	2.0%
Hike/Bike	9.0%
Hunt/Fish	7.0%
Golf	4.0%
Nature (Net)	3.0%
Camping	37.0%
National/State Parks	12.0%
Beach/Waterfront	13.0%
Eco-Travel	2.0%
Sightseeing (Net)	10.0%
Sightseeing	31.0%
Group Tour	26.0%
Attractions (Net)	5.0%
Sporting Event	16.0%
Night Life	7.0%
Gamble	3.0%
Shows	5.0%
Culture (Net)	1.0%
Historic Site	19.0%
Concert/Play/Dance	7.0%
Museum/Art Exhibit	3.0%
Festival/Craft Fair	9.0%

Satisfaction	
Average	7.9
8-10 Excellent	72.0%
4-7 Fair/Good	21.0%
1-3 Poor	7.0%

Value	
Average	8%
8-10 Excellent	64%
4-7 Fair/Good	30%
1-3 Poor	6%

Source: D.K. Shifflet and Associates, Ltd.



TOTAL DOMESTIC OVERNIGHT NON-RESIDENT LEISURE VISITOR PROFILE

2002 Quick Facts: Visitor Profile	
Estimated Volume	15.7 Million
Average Length of Stay	4.6 days
Average Party Size	2.6
Spending Per Person Per Day	\$103.21
Total Direct Spending	\$7.40 Billion

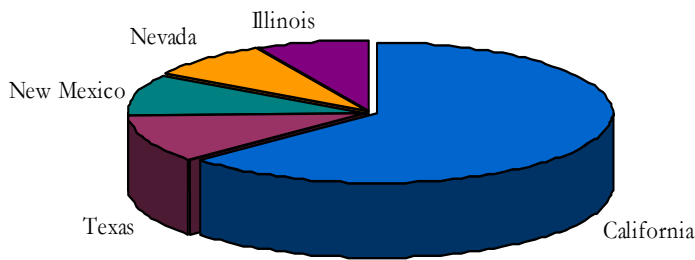
The majority of non-resident, domestic leisure travelers to Arizona in 2002 originated in regional states and cities. Cities in neighboring states contributed more than 39 percent of non-resident leisure visitors.

In 2002, there were no changes in average length of stay for Arizona's

non-resident leisure travelers.

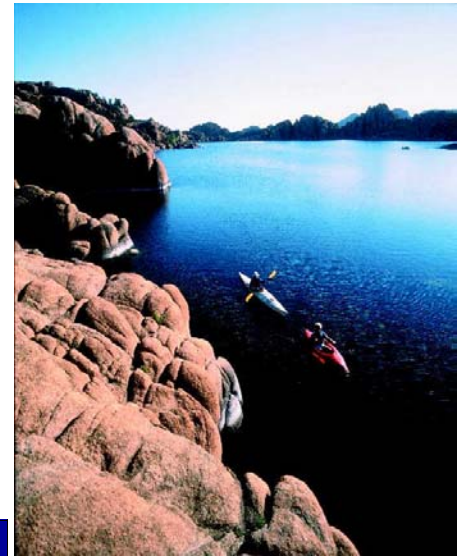
In 2002, 44 percent of Arizona's non-resident leisure travelers stayed in hotel/motels. An additional 40 percent

Top 5 Origin States



Origin State	
California	37.1%
Texas	6.6%
New Mexico	5.5%
Nevada	4.8%
Illinois	4.6%

Origin DMA	
Los Angeles	17.7%
San Diego	8.3%
Albuquerque	5.1%
Las Vegas	4.4%
Salt Lake City	3.8%



Kayakers at Watson Lake

Demographics:

Household Income	
Average HHI Income	\$75,000
<\$25,000	10.0%
\$25K-\$49,999	19.0%
\$50K-\$74,999	23.0%
\$75,000+	48.0%

Education	
No College	25.0%
Attended College	30.0%
College Grad.	24.0%
Post-Grad. Degree	21.0%

Life Stage	
18-34/No children	14.0%
18-34/Children	16.0%
35-54/No children	19.0%
35-54/Children/<\$50K	4.0%
35-54/Children/\$50K+	19.0%
55+/No children/<\$50K	9.0%
55+/No children/\$50K+	17.0%

Age	
Average (years)	45.0
18-34 years	30.0%
35-54 years	42.0%
55+ years	28.0%

Occupation	
Manager, Prof.	42.0%
Tech., Sales, Admin.	18.0%
Service	6.0%
Other	10.0%
Retired	13.0%
Not Employed	12.0%

Source: D.K. Shifflet and Associates, Ltd.



TOTAL DOMESTIC OVERNIGHT NON-RESIDENT LEISURE VISITOR PROFILE

Trip Behaviors:

Accommodations	
Non-Paid (Net)	46.0%
Hotel	44.0%
Paid non/hotel	9.0%
Other	1.0%

Transportation	
Auto	54.0%
Air	38.0%
Other	8.0%

Length of Stay	
Average	4.6
1-3 Nights	61.0%
4-7 Nights	30.0%
8+ Nights	9.0%

Quarter of Travel	
Quarter 1	29.0%
Quarter 2	24.0%
Quarter 3	21.0%
Quarter 4	26.0%

Trip Distance	
Average Distance	942
Under 100 Miles	0.0%
101-300 Miles	9.0%
301-500 Miles	26.0%
501-700 Miles	15.0%
701-1,000 Miles	7.0%
Over 1,000 Miles	42.0%

Expenditures	
Average (per person per day)	\$103.21
Shopping	\$15.90
Transportation	\$37.30
Food	\$23.30
Room	\$14.00
Entertainment	\$14.70
Other	\$4.20

Reservation Type	
Accommodation	
No Reservation	42.0%
Reservation	58.0%
Direct to Location	14.0%
Toll-Free Number	16.0%
Computer/Internet	12.0%
Corporate Travel	1.0%
Other	12.0%
Travel Agent	3.0%

Reservation Type	
Transportation	
No Reservation	38.0%
Reservation	62.0%
Toll-Free Number	17.0%
Computer/Internet	26.0%
Corporate Travel	2.0%
Other	11.0%
Travel Agent	6.0%

Party Composition	
Avg. Party Size	2.6
One Adult	22.0%
MM/FF	7.0%
3+ Adults	10.0%
Couples	37.0%
Families	23.0%

Activities	
General Spending (Net)	95.0%
Dining	36.0%
Shopping	29.0%
Entertainment	30.0%
Outdoor Sports (Net)	27.0%
Adventure Sports	2.0%
Hike/Bike	11.0%
Hunt/Fish	2.0%
Golf	8.0%
Boat/Sail	4.0%
Nature (Net)	37.0%
Camping	6.0%
National/State Parks	21.0%
Beach/Waterfront	2.0%
Eco-Travel	8.0%
Sightseeing (Net)	47.0%
Sightseeing	42.0%
Group Tour	5.0%
Attractions (Net)	25.0%
Theme Park	3.0%
Sporting Event	8.0%
Night Life	6.0%
Gamble	7.0%
Shows	1.0%
Culture (Net)	24.0%
Historic Site	12.0%
Concert/Play/Dance	3.0%
Museum/Art Exhibit	6.0%
Festival/Craft Fair	3.0%

Satisfaction	
Average	7.9
8-10 Excellent	66.0%
4-7 Fair/Good	32.0%
1-3 Poor	2.0%

Value	
Average	7.8
8-10 Excellent	61.0%
4-7 Fair/Good	36.0%
1-3 Poor	2.0%

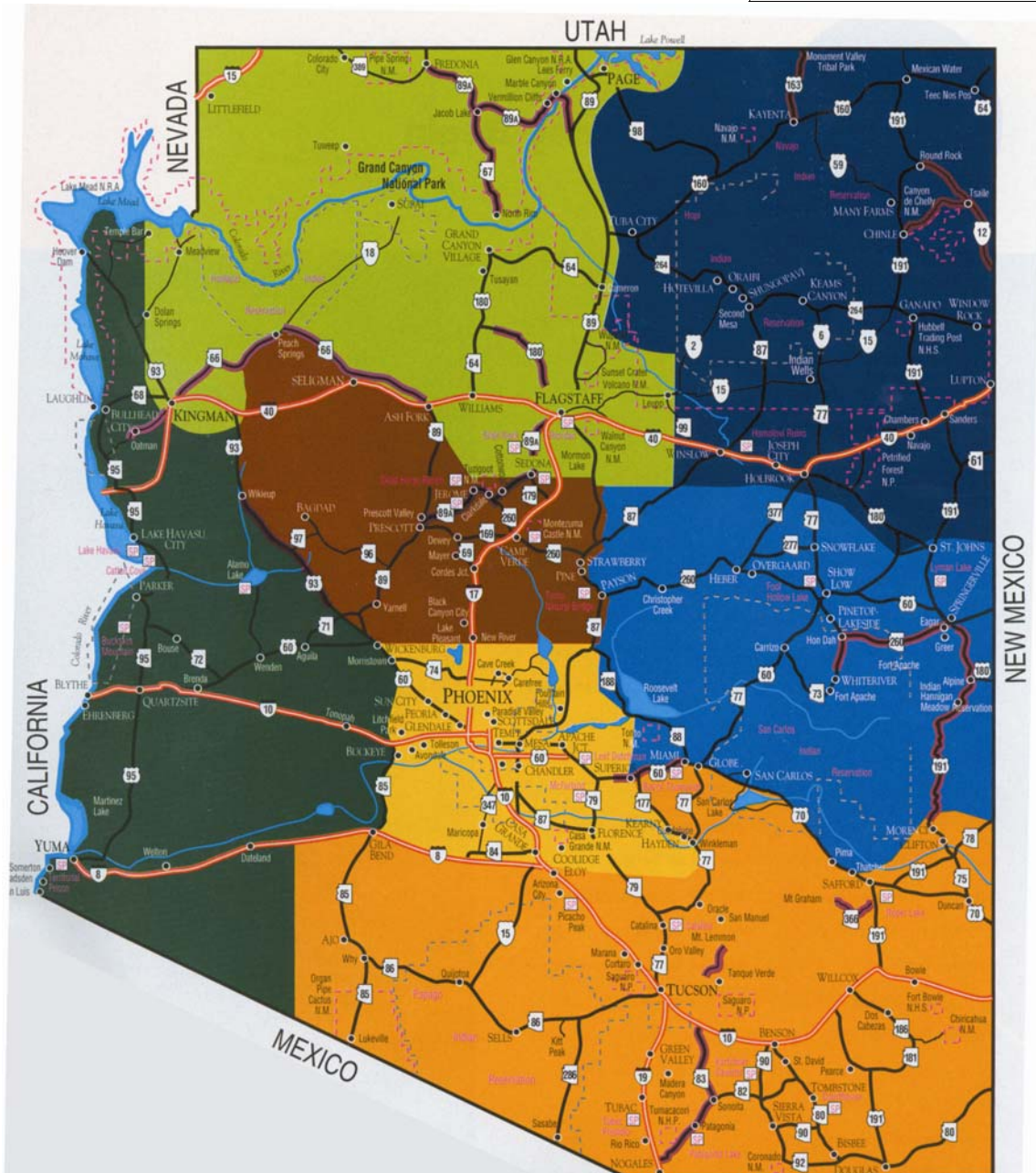
Source: D.K. Shifflet and Associates, Ltd.

REGIONAL PROFILES

Arizona's seven tourism regions offer a vibrant blend of cultures and traditions. In the following sections, travel and tourism related visitation information for each region features origin markets, purpose of trip, demographics, estimated expenditures,

and much more. D.K. Shifflet and Associates aggregated sufficient data for each region to supply an appropriate sample size for analysis.

Canyon Country	
Valley of the Sun	
Central Territory	
Northeast Country	
High Country	
Old West Country	
West Coast	



CANYON COUNTRY

Honored by the United Nations as a World Heritage site, the Grand Canyon is one of the seven natural wonders of the world. The Canyon Country region sweeps across the red rocks of Sedona to the San Francisco Peaks above Flagstaff, and from the waterfalls of Havasupai to the undulating plateaus of the Arizona strip. Canyon Country includes Grand Canyon National Park, Slide Rock State Park, Hualapai Indian Reservation, Walnut Canyon National Monument, and the cities of Sedona, Flagstaff, Page, Williams, Kingman, and Peach Springs.

Data was aggregated from 2001 and 2002.



Regional Statistics	
Overnight Leisure Visitor	2002
Average Age	42
Average Household Income	\$67,150
Average Party Size	2.9
Average Length of Stay	2.2 nights
Avg. Daily Expenditure Per Person	\$118.00
Average Round-Trip Distance	1,568 miles

Top Five Activities	
Activity	2002
National/State Parks	49%
Sightseeing	56%
Dining	40%
Shopping	32%
Entertainment	27%

Source: D.K. Shifflet and Associates, Ltd.

Top Ten Origin Markets	
DMA	2002
Phoenix	22.6%
Los Angeles	14.3%
Tucson (Sierra Vista)	5.8%
Albuquerque	5.6%
Denver	4.4%
New York	3.9%
Salt Lake City	3.3%
San Francisco-Oakland-San Jose	2.1%
San Diego	1.7%
Las Vegas	1.7%

Source: D.K. Shifflet and Associates, Ltd.

CANYON COUNTRY

Demographics:

Household Income		Lifestage		Age	
Average HHI Income	\$67,150	18-34/No children	21%	Average (years)	41.7
<\$25,000	11%	18-34/Children	18%	18-34 years	38%
\$25K-\$49,999	28%	35-54/No children	15%	35-54 years	41%
\$50K-\$74,999	28%	35-54/Children/<\$50K	9%	55+ years	21%
\$75,000+	34%	35-54/Children/\$50K+	17%	Education	
Occupation		55+/No children/<\$50K	8%	No College	35%
Manager, Prof.	34%	55+/No children/\$50K+	12%	Attended College	25%
Tech., Sales, Admin.	20%			College Grad.	23%
Service	10%			Post-Grad. Degree	17%
Other/Retired/Student	23%				
Not Employed	12%				

Trip Behaviors:

Purpose of Stay		Expenditures		Activities	
Business	18%	Average (per person per day)	\$118.00	General Spending (Net)	99%
Leisure	82%	Shopping	\$14.16	Dining	40%
Accommodations		Transportation	\$31.67	Shopping	32%
Non-Paid (Net)	17%	Food	\$29.10	Entertainment	27%
Hotel	71%	Room	\$21.10	Outdoor Sports (Net)	36%
Paid non/hotel	9%	Entertainment	\$15.40	Adventure Sports	1%
Transportation		Other	\$5.70	Hike/Bike	17%
Auto	77%	Reservation Type		Hunt/Fish	8%
Air	14%	No Reservation	33%	Golf	NA
Other	9%	Reservation (Net)	67%	Boat/Sail	9%
Length of Stay		Toll-Free Number	19%	Snow Ski	1%
Average	2.15 nights	Direct to Location	15%	Nature (Net)	72%
1-3 Nights	88%	Computer/Internet	16%	Camping	7%
4-7 Nights	10%	Travel Agent	2%	National/State Parks	49%
8+ Nights	3%	Corporate Travel	1%	Beach/Waterfront	3%
Quarter of Travel		Other	13%	Eco-Travel	13%
Quarter 1	15.0%	Trip Distance		Sightseeing (Net)	62%
Quarter 2	35%	Ave. Round Trip Distance	1,568	Sightseeing	56%
Quarter 3	35%	Under 100 Miles	NA	Group Tour	6%
Quarter 4	14%	101-250 Miles	18%	Attractions (Net)	7%
Party Composition		251-500 Miles	30%	Theme Park	1%
Avg. Party Size	2.85	501-750 Miles	16%	Sporting Event	3%
One Adult	11%	751-1,000 Miles	8%	Night Life	2%
MM/FF	12%	More than 1,001 Miles	28%	Gamble	1%
3+ Adults	10%			Shows	NA%
Couples	37%			Culture (Net)	29%
Families	30%			Historic Site	21%
				Concert/Play/Dance	NA%
				Museum/Art Exhibit	5%
				Festival/Craft Fair	3%

Source: D.K. Shifflet and Associates, Ltd.

VALLEY OF THE SUN

With nearly 4 million residents, the Valley of the Sun is one of the country's largest metropolitan areas, encompassing more 2,000 square miles. The Valley of the Sun is home to the state's capital city of Phoenix, surrounded by such cities as Chandler, Glendale, Mesa, Paradise Valley, Scottsdale, and Tempe. The city of Phoenix owes its name to an early civic leader who, looking out on prehistoric Indian ruins, observed that one day, like the bird of mythology, a new civilization would rise from the ashes of earlier ones. There is something to suit everyone's taste in the Valley of the Sun.

Data was taken from 2002 visitation only.



Regional Statistics	
Overnight Leisure Visitor	2002
Average Age	44
Average Household Income	\$78,060
Average Party Size	2.0
Average Length of Stay	3.9 nights
Avg. Daily Expenditure Per Person	\$115.00
Average Round-Trip Distance	1,762 miles

Top Five Activities	
Activity	2002
Dining	39%
Sightseeing	33%
Entertainment	33%
Shopping	28%
Watch Sports Event	13%

Source: D.K. Shifflet and Associates, Ltd.

Top Ten Origin Markets	
DMA	2002
Los Angeles	12.0%
San Diego	9.2%
Phoenix	7.7%
Tucson (Sierra Vista)	5.7%
Chicago	5.4%
Albuquerque	4.7%
San Francisco-Oakland-San Jose	3.5%
Fresno	3.3%
New York	2.6%
Denver	2.6%

Source: D.K. Shifflet and Associates, Ltd.

VALLEY OF THE SUN

Demographics:

Household Income		Lifestage		Age	
Average HHI Income	\$78,060	18-34/No children	16%	Average (years)	43.72
<\$25,000	10%	18-34/Children	20%	18-34 years	36%
\$25K-\$49,999	18%	35-54/No children	16%	35-54 years	40%
\$50K-\$74,999	20%	35-54/Children/<\$50K	4%	55+ years	25%
\$75,000+	51%	35-54/Children/\$50K+	19%	Education	
Occupation		55+/No children/<\$50K	9%	No College	17%
Manager, Prof.	46%	55+/No children/\$50K+	15%	Attended College	30%
Tech., Sales, Admin.	19%			College Grad.	27%
Service	4%			Post-Grad. Degree	26%
Other/Retired/Student	19%				
Not Employed	12%				

Trip Behaviors:

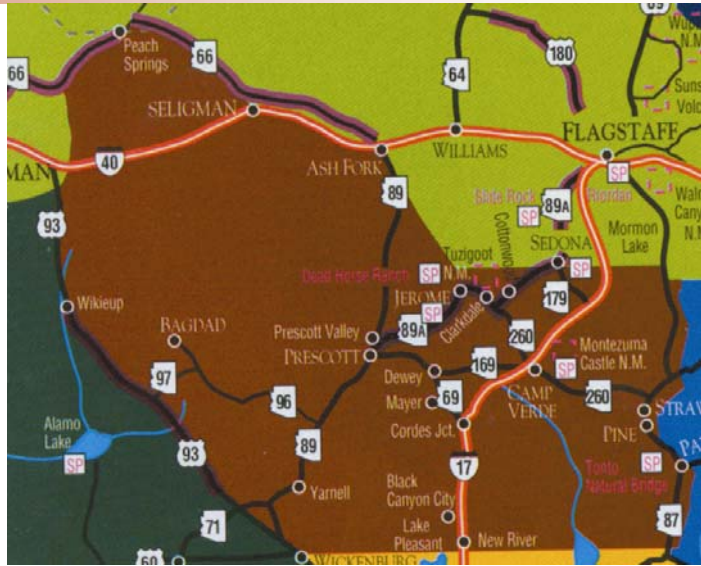
Purpose of Stay		Expenditures		Activities	
Business	29%	Average (per person per day)	\$114.50	General Spending (Net)	100%
Leisure	71%	Shopping	\$16.50	Dining	39%
Accommodations		Transportation	\$40.12	Shopping	28%
Non-Paid (Net)	55%	Food	\$24.20	Entertainment	33%
Hotel	39%	Room	\$12.60	Outdoor Sports (Net)	23%
Paid non/hotel	4%	Entertainment	\$16.90	Adventure Sports	2%
Transportation		Other	\$4.10	Hike/Bike	8%
Auto	48%	Reservation Type		Hunt/Fish	NA
Air	48%	No Reservation	42%	Golf	12%
Other	4%	Reservation (Net)	58%	Boat/Sail	NA
Length of Stay		Toll-Free Number	19%	Snow Ski	1%
Average	3.91 nights	Direct to Location	12%	Nature (Net)	16%
1-3 Nights	56%	Computer/Internet	13%	Camping	1%
4-7 Nights	35%	Travel Agent	4%	National/State Parks	10%
8+ Nights	9%	Corporate Travel	1%	Beach/Waterfront	1%
Quarter of Travel		Other	9%	Eco-Travel	4%
Quarter 1	29%	Trip Distance		Sightseeing (Net)	36%
Quarter 2	22%	Ave. Round Trip Distance	1,762	Sightseeing	33%
Quarter 3	21%	Under 100 Miles	3%	Group Tour	3%
Quarter 4	27%	101-250 Miles	16%	Attractions (Net)	35%
Party Composition		251-500 Miles	24%	Theme Park	4%
Avg. Party Size	2.02	501-750 Miles	13%	Sporting Event	13%
One Adult	40%	751-1,000 Miles	4%	Night Life	9%
MM/FF	6%	More than 1,001 Miles	40%	Gamble	8%
3+ Adults	5%			Shows	1%
Couples	28%			Culture (Net)	17%
Families	21%			Historic Site	6%
				Concert/Play/Dance	4%
				Museum/Art Exhibit	5%
				Festival/Craft Fair	2%

Source: D.K. Shifflet and Associates, Ltd.

CENTRAL TERRITORY

In 1864, when Congress created the Arizona territory, the ranching and mining community of Prescott served as the territorial capital. Prescott lies at the foot of the Bradshaw Mountains in the world's largest forest of Ponderosa Pine trees. Montezuma Castle National Monument, just outside Camp Verde, shelters the well-preserved remains of a five-story, twenty-room cliff dwelling built 800 years ago by the area's ancestral Sinagua people. Central Territory includes such communities as Jerome, Wickenburg, the Verde Valley, Ash Fork, and Clarkdale.

Data was aggregated from 2000-2002.



Regional Statistics	
Overnight Leisure Visitor	2002
Average Age	45
Average Household Income	\$62,610
Average Party Size	2.5
Average Length of Stay	3 nights
Avg. Daily Expenditure Per Person	\$110.00
Average Round-Trip Distance	1,200 miles

Top Ten Origin Markets	
DMA	2002
Phoenix	31.5%
Los Angeles	17.0%
Tucson (Sierra Vista)	7.2%
San Diego	5.5%
Albuquerque	4.8%
Las Vegas	4.2%
Houston	2.5%
Denver	1.2%
New York	1.0%
Salt Lake City	.9%

Source: D.K. Shifflet and Associates, Ltd.

Top Five Activities	
Activity	2002
Sightseeing	51.0%
Shopping	32.0%
Dining	31%
National/State Park	26%
Entertainment	23%

Source: D.K. Shifflet and Associates, Ltd.

CENTRAL TERRITORY

Demographics:

Household Income		Lifestage		Age	
Average HHI Income	\$62,610	18-34/No children	19%	Average (years)	44.7
<\$25,000	10%	18-34/Children	14%	18-34 years	33%
\$25K-\$49,999	27%	35-54/No children	19%	35-54 years	42%
\$50K-\$74,999	34%	35-54/Children/<\$50K	8%	55+ years	25%
\$75,000+	28%	35-54/Children/\$50K+	15%	Education	
Occupation		55+/No children/<\$50K	7%	No College	21%
Manager, Prof.	32%	55+/No children/\$50K+	17%	Attended College	38%
Tech., Sales, Admin.	29%			College Grad.	24%
Service	7%			Post-Grad. Degree	17%
Other/Retired/Student	19%				
Not Employed	13%				

Trip Behaviors:

Purpose of Stay		Expenditures		Activities	
Business	19%	Average (per person per day)	\$110.00	General Spending (Net)	86%
Leisure	81%	Shopping	\$21.40	Dining	31%
Accommodations		Transportation	\$28.05	Shopping	32%
Non-Paid (Net)	40%	Food	\$22.80	Entertainment	23%
Hotel	36%	Room	\$19.30	Outdoor Sports (Net)	31%
Paid non/hotel	22%	Entertainment	\$12.70	Adventure Sports	2%
Transportation		Other	\$5.40	Hike/Bike	21%
Motor Vehicle	73%	Reservation Type		Hunt/Fish	3%
Air	17%	No Reservation	31%	Golf	3%
Other	10%	Reservation (Net)	69%	Boat/Sail	1%
Length of Stay		Toll-Free Number	17%	Snow Ski	1%
Average	2.9 nights	Direct to Location	21%	Nature (Net)	46%
1-3 Nights	75%	Computer/Internet	13%	Camping	10%
4-7 Nights	21%	Travel Agent	3%	National/State Parks	26%
8+ Nights	5%	Corporate Travel	2%	Beach/Waterfront	1%
Quarter of Travel		Other	19%	Eco-Travel	12%
Quarter 1	19%	Trip Distance		Sightseeing (Net)	55%
Quarter 2	29%	Ave. Round Trip Distance	1,200	Sightseeing	51%
Quarter 3	26%	Under 100 Miles	1%	Group Tour	4%
Quarter 4	25%	101-250 Miles	39%	Attractions (Net)	12%
Party Composition		251-500 Miles	23%	Theme Park	2%
Avg. Party Size	2.5	501-750 Miles	13%	Sporting Event	1%
One Adult	20%	751-1,000 Miles	3%	Night Life	4%
MM/FF	5%	More than 1,001 Miles	21%	Gamble	4%
3+ Adults	7%			Shows	1%
Couples	42%			Culture (Net)	35%
Families	27%			Historic Site	22%
				Concert/Play/Dance	1%
				Museum/Art Exhibit	4%
				Festival/Craft Fair	8%

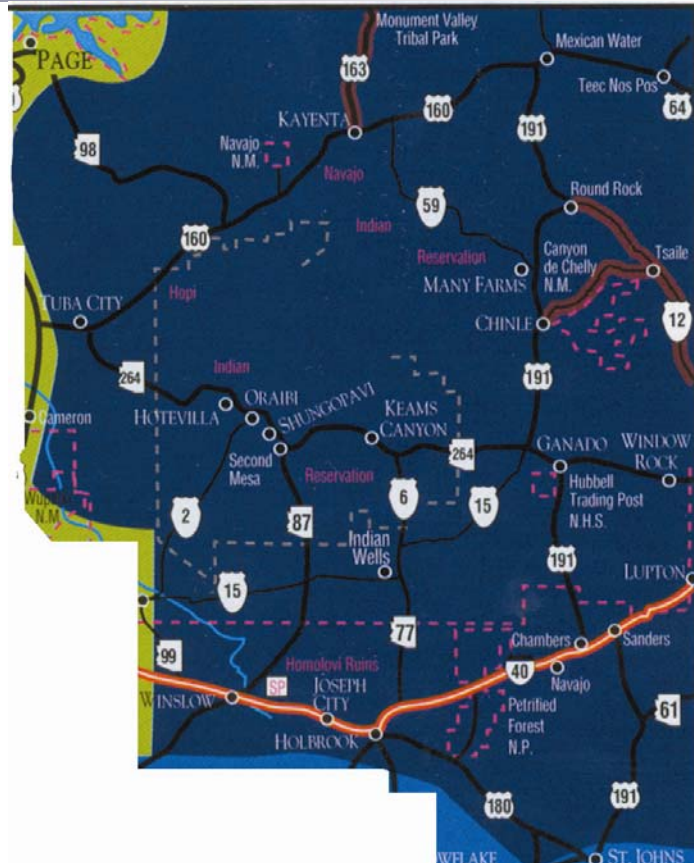
Source: D.K. Shifflet and Associates, Ltd.

NORTHEAST COUNTRY

Northeast Country is home to such places as the Painted Desert, Canyon de Chelly, Monument Valley, and to two of Arizona's twenty-one Native American tribes, the Navajo and Hopi. Almost 25,000 miles of northeastern Arizona belongs to the Navajo people, whose capital is Window Rock. The town, named for a natural arch in the sandstone cliffs that stand behind it, is home to the Navajo Tribal Museum and the Navajo Arts and Crafts Enterprise. The 4,000-square-mile Hopi reservation spreads over three tall mesas. The Hopi villages are among the oldest continuously occupied settlements in North America.

To the east, Holbrook preserves a different kind of history. A stop along Historic Route 66, proudly preserves the history of America's "Mother Road". Further east of Holbrook, lies Petrified Forest National Park.

Data was aggregated from 1998-2002.



Regional Statistics	
Overnight Leisure Visitor	2002
Average Age	52
Average Household Income	\$59,620
Average Party Size	2.4
Average Length of Stay	1.6 days
Avg. Daily Expenditure Per Person	\$109.00
Average Round-Trip Distance	1,812 miles

Top Five Activities	
Activity	2002
Sightseeing	41%
National/State Parks	38%
Visit Historic Site	28%
Shopping	25%
Dining	24%

Top Ten Origin Markets	
DMA	2002
Los Angeles	11.6%
Phoenix	11.5%
Las Vegas	6.9%
Evansville, IN	5.9%
Albuquerque	5.6%
San Diego	4.7%
Oklahoma City	4.5%
Tucson (Sierra Vista)	3.6%
St. Louis	3.3%
Minneapolis	3.0%

Source: D.K. Shifflet and Associates, Ltd.

NORTHEAST COUNTRY

Demographics:

Household Income		Lifestage		Age	
Average HHI Income	\$59,620	18-34/No children	5%	Average (years)	51.5
<\$25,000	15%	18-34/Children	10%	18-34 years	15.0%
\$25K-\$49,999	21%	35-54/No children	17%	35-54 years	42.0%
\$50K-\$74,999	38%	35-54/Children/<\$50K	5%	55+ years	43%
\$75,000+	26%	35-54/Children/\$50K+	20%	Education	
Occupation		55+/No children/<\$50K	17%	No College	35%
Manager, Prof.	21%	55+/No children/\$50K+	26%	Attended College	20%
Tech., Sales, Admin.	16%			College Grad.	11%
Service	4%			Post-Grad. Degree	33%
Other/Retired/Student	36%				
Not Employed	24%				

Trip Behaviors:

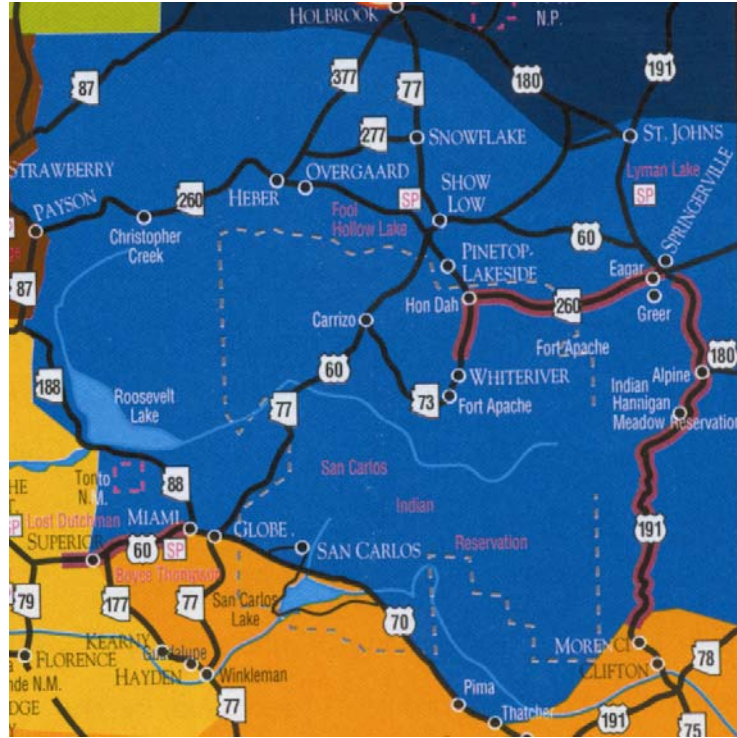
Purpose of Stay		Expenditures		Activities	
Business	23.0%	Average (per person per day)	\$109.27	General Spending (Net)	71%
Leisure	77.0%	Shopping	\$22.20	Dining	24%
Accommodations		Transportation	\$32.72	Shopping	25%
Non-Paid (Net)	13%	Food	\$18.80	Entertainment	22%
Hotel	69%	Room	\$16.60	Outdoor Sports (Net)	10%
Paid non/hotel	16%	Entertainment	\$13.60	Adventure Sports	NA
Transportation		Other	\$5.30	Hike/Bike	10%
Motor Vehicle	77%	Reservation Type		Hunt/Fish	NA
Air	14%	No Reservation	52%	Golf	NA
Other	9%	Reservation (Net)	48%	Boat/Sail	NA
Length of Stay		Toll-Free Number	16%	Snow Ski	NA
Average	1.6 nights	Direct to Location	27%	Nature (Net)	44%
1-3 Nights	93%	Computer/Internet	1%	Camping	5%
4-7 Nights	6%	Travel Agent	4%	National/State Parks	38%
8+ Nights	1%	Corporate Travel	NA	Beach/Waterfront	NA
Quarter of Travel		Other	NA	Eco-Travel	1%
Quarter 1	11%	Trip Distance		Sightseeing (Net)	45%
Quarter 2	38%	Ave. Round Trip Distance	1,812	Sightseeing	41%
Quarter 3	29%	Under 100 Miles	NA	Group Tour	4%
Quarter 4	22%	101-250 Miles	3%	Attractions (Net)	NA
Party Composition		251-500 Miles	30%	Theme Park	NA
Avg. Party Size	2.4	501-750 Miles	14%	Sporting Event	NA
One Adult	18%	751-1,000 Miles	12%	Night Life	NA
MM/FF	8%	More than 1,001 Miles	40%	Gamble	NA
3+ Adults	7%			Shows	NA
Couples	43%			Culture (Net)	38%
Families	24%			Historic Site	28%
				Concert/Play/Dance	NA
				Museum/Art Exhibit	1%
				Festival/Craft Fair	9%

Source: D.K. Shifflet and Associates, Ltd.

HIGH COUNTRY

High Country is located on the eastern border of Arizona and is home to the Mogollon Rim and the White Mountains. Payson lies at the foot of the Mogollon Rim and to the northwest is Tonto Natural Bridge, a huge limestone arch that stretches across a deep, boulder-strewn canyon. The White Mountains are home to Mount Baldy, which stands 11,403 feet tall. High Country is also home to the White Mountain Apache Indian Reservation and their capital is located at White River, near Fort Apache. High Country is home to the cities of Heber, Overgaard, Snowflake, Pinetop-Lakeside, and Springerville.

Data was aggregated from 1998-2002.



Regional Statistics	
Overnight Leisure Visitor	2002
Average Age	42
Average Household Income	\$53,060
Average Party Size	2.9
Average Length of Stay	2.8 nights
Avg. Daily Expenditure Per Person	\$73.00
Average Round-Trip Distance	724 miles

Top Five Activities	
Activity	2002
Sightseeing	24%
Dining	23%
National/State Park	17%
Hike/Bike	17%
Entertainment	14%
Camping	14%

Top Ten Origin Markets	
DMA	2002
Phoenix	61.8%
Salt Lake City	9.3%
Tucson (Sierra Vista)	8.0%
Albuquerque	3.5%
San Diego	2.0%
Los Angeles	1.9%
Fresno-Visalia	1.9%
San Francisco-Oakland-San Jose	1.8%
Seattle-Tacoma	0.9%
Denver	0.5%

Source: D.K. Shifflet and Associates, Ltd.

HIGH COUNTRY

Demographics:

Household Income		Lifestage		Age	
Average HHI Income	\$53,060	18-34/No children	10%	Average (years)	41.85
<\$25,000	19%	18-34/Children	36%	18-34 years	45%
\$25K-\$49,999	35%	35-54/No children	19%	35-54 years	37%
\$50K-\$74,999	28%	35-54/Children/<\$50K	6%	55+ years	18%
\$75,000+	18%	35-54/Children/\$50K+	12%	Education	
Occupation		55+/No children/<\$50K	10%	No College	38%
Manager, Prof.	30%	55+/No children/\$50K+	7%	Attended College	24%
Tech., Sales, Admin.	17%			College Grad.	22%
Service	9%			Post-Grad. Degree	17%
Other/Retired/Student	28%				
Not Employed	17%				

Trip Behaviors:

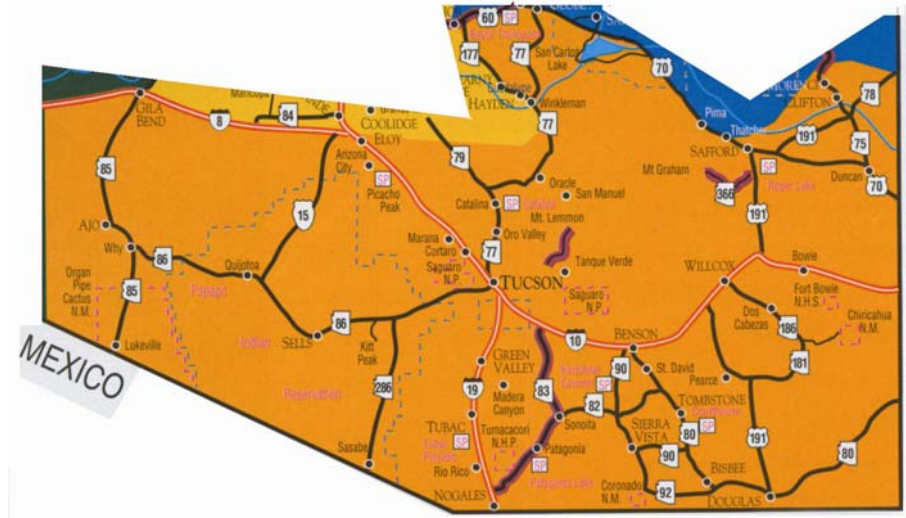
Purpose of Stay		Expenditures		Activities	
Business	20%	Shopping	\$10.40	General Spending (Net)	48%
Leisure	80%	Transportation	\$16.90	Dining	23%
Accommodations		Food	\$17.20	Shopping	11%
Non-Paid (Net)	47%	Room	\$11.50	Entertainment	14%
Hotel	33%	Entertainment	\$8.90	Outdoor Sports (Net)	42%
Paid non/hotel	17%	Other	\$7.90	Adventure Sports	2%
Transportation				Hike/Bike	17%
Auto	70%	Reservation Type		Hunt/Fish	13%
Air	4%	No Reservation	43%	Golf	1%
Other	25%	Reservation (Net)	57%	Boat/Sail	4%
Length of Stay		Toll-Free Number	14%	Snow Ski	5%
Average	2.8 nights	Direct to Location	25%	Nature (Net)	36%
1-3 Nights	78%	Computer/Internet	3%	Camping	14%
4-7 Nights	17%	Travel Agent	1%	National/State Parks	17%
8+ Nights	5%	Corporate Travel	1%	Beach/Waterfront	2%
Quarter of Travel		Other	13%	Eco-Travel	3%
Quarter 1	16%	Trip Distance		Sightseeing (Net)	29%
Quarter 2	27%	Ave. Round Trip Distance	724	Sightseeing	24%
Quarter 3	38%	Under 100 Miles	NA	Group Tour	5%
Quarter 4	20%	101-250 Miles	32%	Attractions (Net)	13%
Party Composition		251-500 Miles	50%	Theme Park	1%
Avg. Party Size	2.4	501-750 Miles	10%	Sporting Event	1%
One Adult	16%	751-1,000 Miles	1%	Night Life	4%
MM/FF	4%	More than 1,001 Miles	5%	Gamble	6%
3+ Adults	5%			Shows	1%
Couples	40%			Culture (Net)	12%
Families	34%			Historic Site	8%
				Concert/Play/Dance	NA
				Museum/Art Exhibit	NA
				Festival/Craft Fair	4%

Source: D.K. Shifflet and Associates, Ltd.

OLD WEST COUNTRY

Old West Country is located in the Southern part of Arizona, home to the city of Tucson. Old West Country has been the setting of classic western films, historical events, and the meeting place of dozens of cultures. This area is home to many natural treasures including Organ Pipe Cactus National Monument, Saguaro National Park, Nature Conservancy's Ramsey Canyon Preserve, Kartchner Caverns State Park, and Chiricahua National Monument. Other cities and towns in this region include Benson, Bisbee, Sierra Vista, Willcox, Safford, Nogales, and Tubac.

Data was aggregated from 2001 and 2002.



Regional Statistics	
Overnight Leisure Visitor	2002
Average Age	46
Average Household Income	\$61,090
Average Party Size	2.4
Average Length of Stay	3.1 nights
Avg. Daily Expenditure Per Person	\$96.00
Average Round-Trip Distance	1,476 miles

Top Five Activities	
Activity	2002
Sightseeing	39%
Dining	29%
Shopping	26%
Entertainment	20%
National/State Park	16%

Top Ten Origin Markets	
DMA	2002
Phoenix	27.5%
Los Angeles	13.2%
San Diego	4.4%
San Francisco-Oakland-San Jose	4.1%
Tucson (Sierra Vista)	4.0%
Las Vegas	3.2%
Albuquerque	3.0%
Rockford, IL	2.7%
Bakersfield, CA	2.5%
Minneapolis	2.5%

Source: D.K. Shifflet and Associates, Ltd.

OLD WEST COUNTRY

Demographics:

Household Income		Lifestage		Age	
Average HHI Income	\$61,090	18-34/No children	6%	Average (years)	44.68
<\$25,000	23%	18-34/Children	27%	18-34 years	33%
\$25K-\$49,999	19%	35-54/No children	20%	35-54 years	37%
\$50K-\$74,999	25%	35-54/Children/<\$50K	4%	55+ years	30%
\$75,000+	34%	35-54/Children/\$50K+	13%	Education	
Occupation		55+/No children/<\$50K	12%	No College	33%
Manager, Prof.	27%	55+/No children/\$50K+	17%	Attended College	24%
Tech., Sales, Admin.	21%			College Grad.	22%
Service	2%			Post-Grad. Degree	21%
Other/Retired/Student	33%				
Not Employed	17%				

Trip Behaviors:

Purpose of Stay		Expenditures		Activities	
Business	30%	Average (per person per day)	\$95.77	General Spending (Net)	%
Leisure	70%	Shopping	\$14.60	Dining	29%
Accommodations		Transportation	\$31.46	Shopping	26%
Non-Paid (Net)	47%	Food	\$20.60	Entertainment	20%
Hotel	47%	Room	\$14.20	Outdoor Sports (Net)	%
Paid non/hotel	5%	Entertainment	\$10.30	Adventure Sports	2%
Transportation		Other	\$4.50	Hike/Bike	6%
Auto	73%	Reservation Type		Hunt/Fish	1%
Air	20%	No Reservation	50%	Golf	4%
Other	7%	Reservation (Net)	50%	Boat/Sail	NA
Length of Stay		Toll-Free Number	11%	Snow Ski	NA
Average	3.06 nights	Direct to Location	20%	Nature (Net)	%
1-3 Nights	75%	Computer/Internet	9%	Camping	4%
4-7 Nights	20%	Travel Agent	3%	National/State Parks	16%
8+ Nights	6%	Corporate Travel	NA	Beach/Waterfront	NA
Quarter of Travel		Other	7%	Eco-Travel	7%
Quarter 1	30%	Trip Distance		Sightseeing (Net)	%
Quarter 2	24%	Ave. Round Trip Distance	1,476	Sightseeing	39%
Quarter 3	18%	Under 100 Miles	1%	Group Tour	2%
Quarter 4	28%	101-250 Miles	28%	Attractions (Net)	%
Party Composition		251-500 Miles	21%	Theme Park	2%
Avg. Party Size	2.37	501-750 Miles	14%	Sporting Event	5%
One Adult	25%	751-1,000 Miles	8%	Night Life	4%
MM/FF	4%	More than 1,001 Miles	29%	Gamble	3%
3+ Adults	8%			Shows	1%
Couples	31%			Culture (Net)	%
Families	31%			Historic Site	13%
				Concert/Play/Dance	2%
				Museum/Art Exhibit	9%
				Festival/Craft Fair	3%

Source: D.K. Shifflet and Associates, Ltd.

ARIZONA'S WEST COAST

Flowing hundreds of miles from Hoover Dam to Mexico, the Colorado River forms Arizona's West Coast. Along the way, beaches, lakes and coves provide boating, fishing, water skiing and wildlife viewing. In the southern part of the West Coast is the city of Yuma. Located between Yuma and Quartzsite, the Kofa National Wildlife Refuge is home to desert bighorn sheep, Gila monsters, and

red-tail hawks, among hundreds of other animal species. Moving north, the West Coast region includes the cities of Ehrenberg, Quartzsite, Parker, Wenden, Lake Havasu, Oatman, and Bullhead City.

Data was aggregated from 2000-2002.

Regional Statistics	
Overnight Leisure Visitor	2002
Average Age	47
Average Household Income	\$61,239
Average Party Size	2.4
Average Length of Stay	3.1 nights
Avg. Daily Expenditure Per Person	\$75.00
Average Round-Trip Distance	956 miles

Top Ten Origin Markets	
DMA	2002
Los Angeles	37%
Phoenix	13.4%
Las Vegas	11.2%
San Diego	9.0%
Santa Barbara-Santa Maria-San Luis Obispo	2.3%
Salt Lake City	2.1%
Tucson (Sierra Vista)	2.0%
Albuquerque	2.0%
San Francisco-Oakland-San Jose	1.7%
Bakersfield	1.5%



Top Five Activities	
Activity	2002
Sightseeing	36%
Entertainment	25%
Shopping	25%
Dining	21%
Gambling	18%
Camping	18%

Source: D.K. Shifflet and Associates, Ltd.

ARIZONA'S WEST COAST

Demographics:

Household Income		Lifestage		Age	
Average HHI Income	\$62,350	18-34/No children	8%	Average (years)	46.65
<\$25,000	17%	18-34/Children	16%	18-34 years	24%
\$25K-\$49,999	29%	35-54/No children	19%	35-54 years	46%
\$50K-\$74,999	21%	35-54/Children/<\$50K	9%	55+ years	30%
\$75,000+	34%	35-54/Children/\$50K+	18%	Education	
Occupation		55+/No children/<\$50K	13%	No College	37%
Manager, Prof.	27%	55+/No children/\$50K+	17%	Attended College	39%
Tech., Sales, Admin.	27%			College Grad.	18%
Service	6%			Post-Grad. Degree	6%
Other/Retired/Student	29%				
Not Employed	12%				

Trip Behaviors:

Purpose of Stay		Expenditures		Activities	
Business	22%	Average (per person per day)	\$75.28	General Spending (Net)	71%
Leisure	78%	Shopping	\$12.70	Dining	21%
Accommodations		Transportation	\$19.46	Shopping	25%
Non-Paid (Net)	48%	Food	\$16.30	Entertainment	25%
Hotel	32%	Room	\$9.10	Outdoor Sports (Net)	34%
Paid non/hotel	17%	Entertainment	\$13.00	Adventure Sports	3%
Transportation		Other	\$4.70	Hike/Bike	4%
Motor Vehicle	73%	Reservation Type		Hunt/Fish	5%
Air	6%	No Reservation	56%	Golf	5%
Other	21%	Reservation (Net)	44%	Boat/Sail	13%
Length of Stay		Toll-Free Number	14%	Snow Ski	NA
Average	3.09 nights	Direct to Location	19%	Nature (Net)	36%
1-3 Nights	75%	Computer/Internet	3%	Camping	18%
4-7 Nights	19%	Travel Agent	1%	National/State Parks	4%
8+ Nights	6%	Corporate Travel	NA	Beach/Waterfront	12%
Quarter of Travel		Other	7%	Eco-Travel	2%
Quarter 1	34%	Trip Distance		Sightseeing (Net)	45%
Quarter 2	30%	Ave. Round Trip Distance	956	Sightseeing	36%
Quarter 3	16%	Under 100 Miles	3%	Group Tour	9%
Quarter 4	20%	101-250 Miles	33%	Attractions (Net)	31%
Party Composition		251-500 Miles	42%	Theme Park	1%
Avg. Party Size	2.43	501-750 Miles	7%	Sporting Event	2%
One Adult	17%	751-1,000 Miles	3%	Night Life	7%
MM/FF	5%	More than 1,001 Miles	13%	Gamble	18%
3+ Adults	7%			Shows	3%
Couples	45%			Culture (Net)	16%
Families	27%			Historic Site	10%
				Concert/Play/Dance	NA
				Museum/Art Exhibit	1%
				Festival/Craft Fair	5%

Source: D.K. Shifflet and Associates, Ltd.

TOTAL OVERSEAS AIR VISITORS TO ARIZONA PROFILE

Introduction

International Visitor Profiles are developed by the U.S. Department of Commerce, Office of Travel and Tourism Industries. Major airlines voluntarily conduct the survey. The questionnaires are designed to be self-administered by the respondents, and are distributed on-board flights departing from U.S. airports to international destinations. The questionnaires are available in twelve languages: Arabic, Chinese, English, French, German, Italian, Japanese, Korean, Polish, Portuguese, Russian, and Spanish.

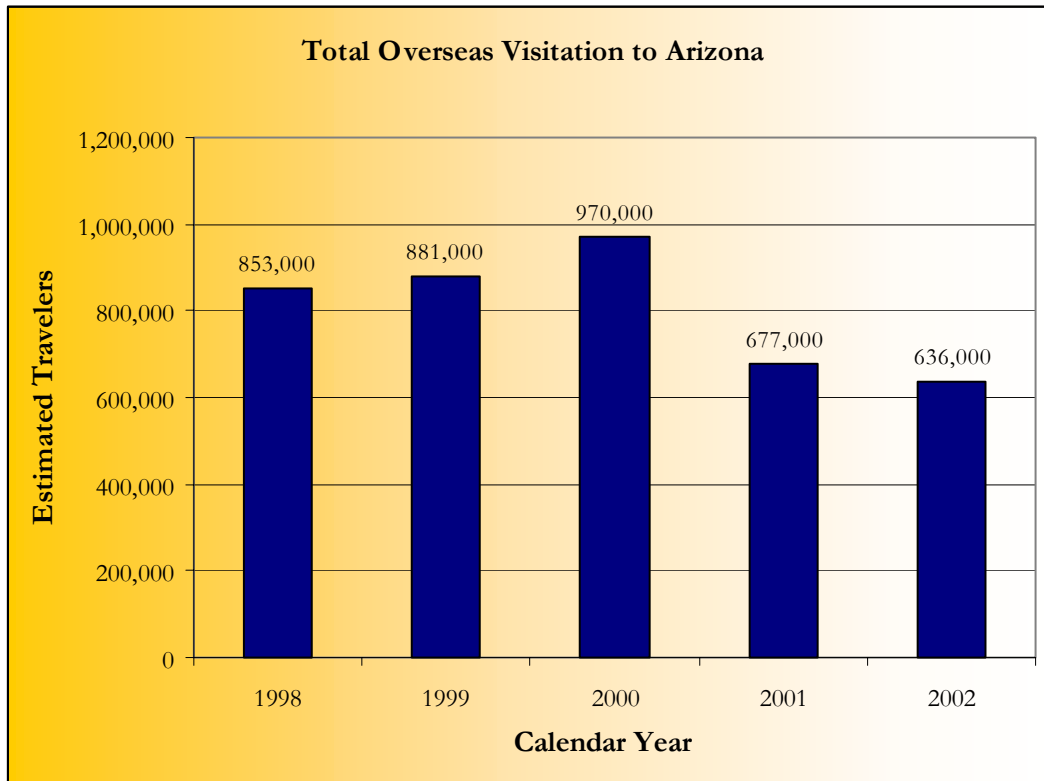
The questionnaire is designed to collect information on a traveler's

complete trip itinerary, including information on every major destination visited, the length of stay and the type of accommodations utilized.

The surveys are conducted monthly, during a seven-day period beginning with the third Monday of the month. The specific flights are selected at random, and participating airlines receive advance listings of the flights to be surveyed.

Typically, 50 airlines participate in the survey. The data is expanded to represent all travelers based upon the INS I-94 data.

The Arizona Office of Tourism collects and reports international profiles for six markets including, Japan, Germany, UK, Mexico, France, and Italy. This report presents the results of the non-US. resident travelers.



Source: U.S. Dept. of Commerce, Tourism Industries

** Does not include visitors from Canada or those arriving by land from Mexico



TOTAL OVERSEAS AIR VISITORS TO ARIZONA PROFILE

Demographics:

Age		Household Income		Party Composition				
Average (years)	40.5	< \$40,000	33.8%	Avg. Travel Party (mean)	3.6			
18-34 years	37.9%	\$40,000 - \$79,999	30.1%	Traveling Alone	34.7%			
35-54 years	43.1%	\$80,000 - \$119,999	17.8%	Spouse	29.4%			
55+ years	19.2%	\$120,000+	18.2%	Family/Relatives	21.4%			
<th>Origin Markets</th> <td colspan="2"> <th>Gender</th> <td colspan="2"> <th>Port of Entry</th> </td> </td>		Origin Markets	<th>Gender</th> <td colspan="2"> <th>Port of Entry</th> </td>		Gender	<th>Port of Entry</th>		Port of Entry
U.K.	13.5%	Men	67.7%	Los Angeles	27.6%			
Mexico	12.6%	Women	32.3%	Other	25.2%			
Germany	11.7%	<th>Frequent Travelers</th> <td>San Francisco</td> <td>10.0%</td>		Frequent Travelers	San Francisco	10.0%		
France	10.8%	Repeat Visitor to the U.S.	73.0%	New York	8.4%			
South Korea	9.0%	U.S. Trips last 12 Months	2.1	Chicago	5.5%			
Japan	8.7%	U.S. Trips last 5 Years	7.3	Atlanta	5.5%			
Italy	3.9%	1 Trip	35.5%	Miami	3.3%			
Oceania	3.5%	2 - 5 Trips	32.6%					
Netherlands	3.1%	5+ Trips	8.2%					
South America	2.8%							
Scandinavia	2.0%							

Trip Behaviors:

Advance Trip Planning		Use of Packages		Information Sources			
Advance Trip Decision	97 days	YES	18.3%	Travel Agency	49.6%		
Advance Air Reservations	50.9 days	Air/Lodging	11.9%	Personal Computer	25.7%		
Use of Pre-Booked Lodging	61%	Guided Tour	9.6%	Friends/Relatives	18.6%		
<th>Accommodations</th> <td>Air/Rental Car</td> <td>8.8%</td> <td>Travel Guides</td> <td>17.4%</td>		Accommodations	Air/Rental Car	8.8%	Travel Guides	17.4%	
Hotel/Motel	77.5%	Air/Lodging/Tour	6.2%	Airlines Directly	14.7%		
Private Home	22.7%	Air/Lodging/Rental Car	6.0%	Tour Company	9.0%		
Other	7.3%	Air/Lodging/Bus	4.8%	State/City Travel Office	8.0%		
<th>Expenditures</th> <td>Air/Lodging/Bus/Tour</td> <td>4.5%</td> <td>Corporate Travel Dept.</td> <td>6.8%</td>		Expenditures	Air/Lodging/Bus/Tour	4.5%	Corporate Travel Dept.	6.8%	
Avg. Spending Per Person Per Day	\$74	Advance Package Booking	88.7 days	Other	6.8%		
<th>AZ Destinations Visited</th> <td># of Nights Pre-paid as Part of a Package</td> <td>10.6 nights</td> <td>Newspapers/Magazines</td> <td>3.8%</td>		AZ Destinations Visited	# of Nights Pre-paid as Part of a Package	10.6 nights	Newspapers/Magazines	3.8%	
Phoenix	49.3%	<th>Length of Stay</th> <td colspan="2"> <th>Transportation in U.S.</th> </td>		Length of Stay	<th>Transportation in U.S.</th>		Transportation in U.S.
Tucson	11.8%	# of Nights in Arizona (mean)	6.3	Rented Auto	52.1%		
Grand Canyon NP	37.3%	# of Nights in U.S. (mean)	26	Airlines in U.S.	39.6%		
Glen Canyon NP	2.7%			Taxi/Cab/Limousine	32.7%		
				Company or Private Auto	29.3%		
				City Subway/Tram/Bus	20.5%		

Source: U.S. Dept. of Commerce, Tourism Industries

** Does not include visitors from Canada or those arriving by land from Mexico



TOTAL OVERSEAS AIR VISITORS TO ARIZONA PROFILE

Purpose / Activities:

Visitation Volume	
Total Int'l Visitation (000s)	636

Purpose of Trip	
Leisure & VFR	81.6%
Leisure/Rec./Holidays	57.0%
Visit Friends/Relatives	12.3%
Other	1.1%
Business and Convention	28.8%
Business/Professional	16.6%
Convention/Conference	8.9%
Study/Teaching	3.7%

Other Destinations Visited	
# of States Visited	3.1
# of Destinations Visited	4.4
California	57.0%
Los Angeles	37.8%
San Francisco	27.4%
San Diego	11.0%
Yosemite N.P.	12.1%
Nevada	45.9%
Las Vegas	45.3%
Utah	20.5%
Bryce Canyon N.P.	8.5%
Colorado	11.5%
New York	11.9%
Florida	4.0%

Leisure Activities	
Shopping	83.5%
Dining in Restaurants	76.9%
Visit National Parks	62.6%
Sightseeing in Cities	52.4%
Touring Countryside	45.1%
Visit Small Towns	44.2%
Visit Historical Places	42.3%
Casinos/Gambling	38.2%
Amusement/Theme Parks	32.8%
Cultural Heritage Sites	30.9%
Art Gallery/Museum	21.2%
Guided Tours	19.3%
Visit Native Am. Comm.	17.2%
Water Sports/Sunbathing	15.7%
Nightclubs/Dancing	14.5%
Concert/Play/Musical	14.0%
Camping/Hiking	12.5%
Attend Sports Event	7.1%
Environ./Eco Excursions	7.1%
Ethnic Heritage Sites	6.5%
Golfing/Tennis	6.3%
Cruises	4.6%
Ranch Vacations	4.2%
Snow Skiing	1.3%
Hunting/Fishing	1.3%

Source: U.S. Dept. of Commerce, Tourism Industries

** Does not include visitors from Canada or those arriving by land from Mexico



TOTAL OVERSEAS AIR VISITORS TO PHOENIX PROFILE **

Demographics:

Age	
Average (years)	41.0
18-34 years	36.9%
35-54 years	48.0%
55+ years	15.1%

Origin Markets	
Germany	11.0%
South Korea	9.8%
U.K.	9.6%
France	8.3%
Japan	6.4%
Oceania	3.6%
Italy	3.1%
South America	2.8%
Scandinavia	2.0%
Netherlands	1.2%

Household Income	
< \$40,000	32.9%
\$40,000 - \$79,999	27.8%
\$80,000 - \$119,999	17.5%
\$120,000+	21.6%

Gender	
Men	77.1%
Women	22.9%

Frequent Travelers	
Repeat Visitor to the U.S.	78.1%
U.S. Trips last 12 Months	2.9
U.S. Trips last 5 Years	11.0
1 Trip	25.8%
2 - 5 Trips	30.8%
5+ Trips	43.4%

Party Composition	
Avg. Travel Party (mean)	3.6
Traveling Alone	47.9%
Family/Relatives	23.7%
Spouse	22.8%
Business Associates	10.0%
Friends	4.3%
Group Tour	1.9%
Adults Only	91.1%
Adults and Children	8.9%

Port of Entry	
Other	33.4%
Los Angeles	20.4%
New York	12.8%
San Francisco	8.2%
Chicago	4.9%
Miami	4.1%

Trip Behaviors:

Advance Trip Planning	
Advance Trip Decision	77.2 days
Advance Air Reservations	38.7 days
Use of Pre-Booked Lodging	60.3%

Accommodations	
Hotel/Motel	77.5%
Private Home	22.7%
Other	7.3%

Expenditures	
Avg. Spending Per Person Per Day	\$57

AZ Destinations Visited	
Tucson	6.2%
Grand Canyon NP	12.9%
Glen Canyon NP	0.7%

Use of Packages	
YES	14.2%
Air/Lodging	10.0%
Guided Tour	9.3%
Air/Rental Car	7.0%
Air/Lodging/Tour	6.7%
Air/Lodging/Bus	5.9%
Air/Lodging/Bus/Tour	5.9%
Air/Lodging/Rental Car	5.5%
Advance Package Booking	80.2 days
# of Nights Pre-paid as Part of a Package	10.7 nights

Length of Stay	
# of Nights in Arizona (mean)	6.1
# of Nights in U.S. (mean)	29.9

Information Sources	
Travel Agency	44.2%
Airlines Directly	19.6%
Personal Computer	19.5%
Friends/Relatives	15.4%
Travel Guides	12.8%
Corporate Travel Dept.	9.3%
Other	9.3%
State/City Travel Office	7.8%
Tour Company	6.3%
Newspapers/Magazines	2.9%

Transportation in U.S.	
Rented Auto	48.1%
Airlines in U.S.	41.0%
Taxi/Cab/Limousine	39.3%
Company or Private Auto	31.0%
City Subway/Tram/Bus	19.3%

Source: U.S. Dept. of Commerce, Tourism Industries

** Does not include visitors from Canada or those arriving by land from Mexico



TOTAL OVERSEAS AIR VISITORS TO PHOENIX PROFILE

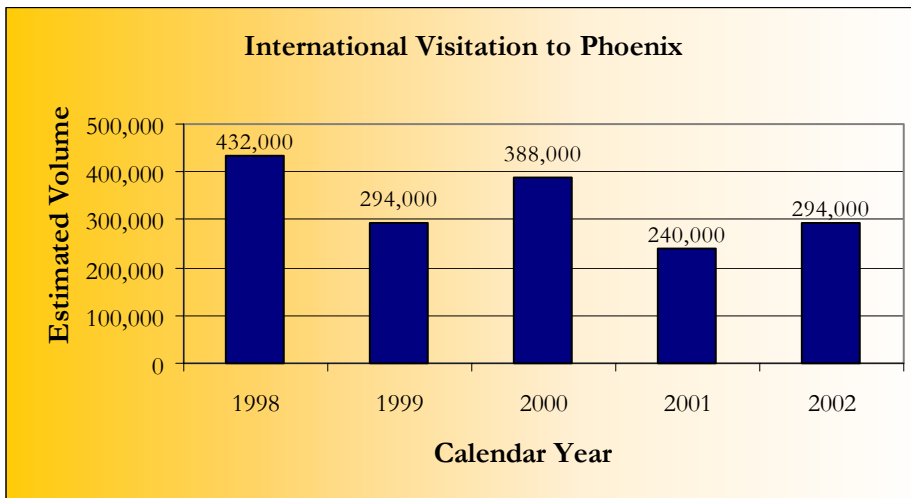
Purpose/Activities:

Visitation Volume	
Total Int'l Visitation (000s)	294

Purpose of Trip	
Leisure & VFR	74.7%
Leisure/Rec./Holidays	46.9%
Visit Friends/Relatives	13.6%
Other	1.9%
Business and Convention	37.2%
Business/Professional	23.6%
Convention/Conference	8.3%
Study/Teaching	5.0%

Other Destinations Visited	
# of States Visited	2.5
# of Destinations Visited	3.7
California	44.3%
Los Angeles	29.4%
San Francisco	25.7%
San Diego	8.4%
Yosemite N.P.	9.1%
Nevada	24.6%
Las Vegas	23.9%
Utah	6.7%
Bryce Canyon N.P.	2.5%
Colorado	3.4%
New York	19.1%
Florida	2.9%

Leisure Activities	
Shopping	77.8%
Dining in Restaurants	76.4%
Sightseeing in Cities	42.1%
Visit National Parks	41.8%
Touring Countryside	39.2%
Visit Historical Places	35.7%
Visit Small Towns	34.0%
Art Gallery/Museum	24.4%
Casinos/Gambling	22.5%
Cultural Heritage Sites	22.4%
Amusement/Theme Parks	22.2%
Nightclubs/Dancing	15.4%
Water Sports/Sunbathing	14.4%
Guided Tours	12.3%
Concert/Play/Musical	11.8%
Visit Native Am. Comm.	11.7%
Golfing/Tennis	10.1%
Attend Sports Event	9.9%
Ethnic Heritage Sites	5.8%
Environ./Eco Excursions	4.9%
Camping/Hiking	4.7%
Cruises	1.5%
Ranch Vacations	1.1%
Snow Skiing	0.9%
Hunting/Fishing	0.6%



Source: U.S. Dept. of Commerce, Tourism Industries

Source: U.S. Dept. of Commerce, Tourism Industries

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TOTAL OVERSEAS AIR VISITORS TO TUCSON PROFILE **

Demographics:

Age	
Average (years)	43.5
18-34 years	28.5%
35-54 years	51.4%
55+ years	20.1%

Origin Markets	
Germany	23.0%
U.K.	15.2%
South America	5.7%
Italy	5.5%
Japan	5.1%
Oceania	4.8%
France	4.7%
Netherlands	3.9%
Scandinavia	1.8%
South Korea	0.5%

Household Income	
< \$40,000	21.0%
\$40,000 - \$79,999	27.6%
\$80,000 - \$119,999	20.6%
\$120,000+	30.9%

Gender	
Men	68.6%
Women	31.4%

Frequent Travelers	
Repeat Visitor to the U.S.	92.6%
U.S. Trips last 12 Months	2.2
U.S. Trips last 5 Years	9.0
1 Trip	11.0%
2 - 5 Trips	36.7%
5+ Trips	52.2%

Party Composition	
Avg. Travel Party (mean)	3.2
Traveling Alone	48.8%
Spouse	28.7%
Family/Relatives	20.6%
Friends	6.9%
Business Associates	2.1%
Group Tour	2.1%
Adults Only	93.5%
Adults and Children	6.5%

Port of Entry	
Other	28.7%
Los Angeles	18.1%
Chicago	11.3%
Dallas/Ft. Worth	9.5%
Atlanta	6.2%
San Francisco	5.8%
Miami	5.3%

Trip Behaviors:

Advance Trip Planning	
Advance Trip Decision	80.3 days
Advance Air Reservations	50.1 days
Use of Pre-Booked Lodging	62.2%

Accommodations	
Hotel/Motel	63.9%
Private Home	35.9%
Other	2.7%

Expenditures	
Avg. Spending Per Person Per Day	\$121

AZ Destinations Visited	
Phoenix	34.7%
Grand Canyon NP	10.5%
Glen Canyon NP	1.5%

Use of Packages	
YES	9.4%
Air/Rental Car	8.3%
Air/Lodging	4.8%
Air/Lodging/Rental Car	4.8%
Guided Tour	2.3%
Air/Lodging/Tour	1.3%
Air/Lodging/Bus	-
Air/Lodging/Bus/Tour	-
Advance Package Booking	98.3 days
# of Nights Pre-paid as Part of a Package	12.4 nights

Length of Stay	
# of Nights in Arizona (mean)	8.6
# of Nights in U.S. (mean)	23.0

Information Sources	
Travel Agency	47.6%
Personal Computer	39.5%
Friends/Relatives	19.7%
Airlines Directly	13.5%
Travel Guides	12.3%
Tour Company	9.6%
Corporate Travel Dept.	7.7%
State/City Travel Office	7.2%
Newspapers/Magazines	3.0%
Other	2.3%

Transportation in U.S.	
Rented Auto	60.2%
Airlines in U.S.	48.0%
Company or Private Auto	33.3%
Taxi/Cab/Limousine	24.9%
City Subway/Tram/Bus	7.8%

Source: U.S. Dept. of Commerce, Tourism Industries

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TOTAL OVERSEAS AIR VISITORS TO TUCSON PROFILE **

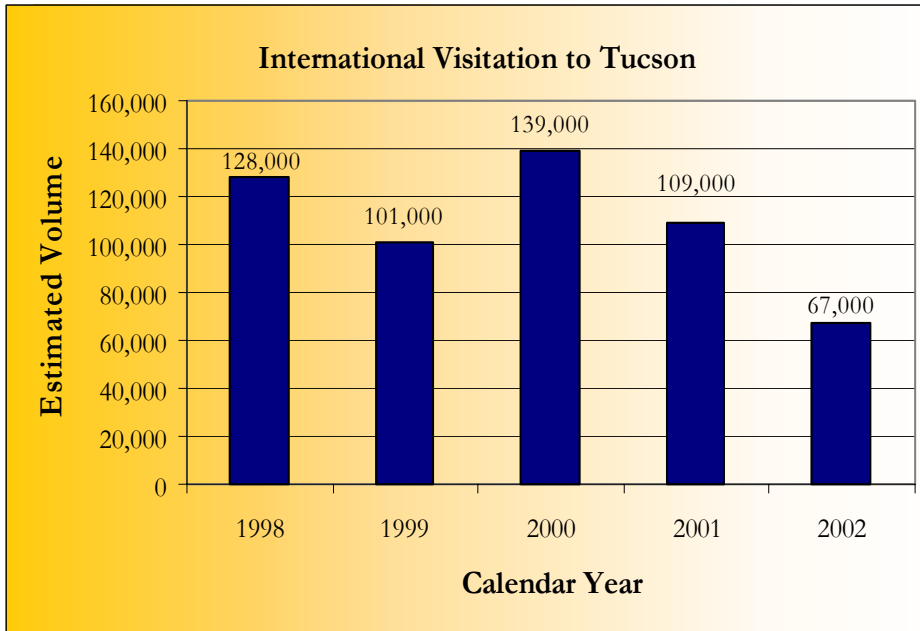
Purpose/Activities:

Visitation Volume	
Total Int'l Visitation (000s)	67

Purpose of Trip	
Leisure & VFR	83.1%
Leisure/Rec./Holidays	39.3%
Visit Friends/Relatives	17.4%
Other	0.1%
Business and Convention	42.0%
Business/Professional	35.9%
Convention/Conference	3.1%
Study/Teaching	4.1%

Other Destinations Visited	
# of States Visited	2.4
# of Destinations Visited	3.8
California	36.6%
Los Angeles	14.5%
San Francisco	12.0%
San Diego	9.4%
Yosemite N.P.	-
Nevada	24.1%
Las Vegas	24.1%
Utah	14.8%
Bryce Canyon N.P.	4.8%
Colorado	7.4%
New York	6.6%
Florida	6.6%

Leisure Activities	
Shopping	82.5%
Dining in Restaurants	80.3%
Touring Countryside	47.1%
Visit National Parks	46.6%
Visit Historical Places	44.9%
Visit Small Towns	41.1%
Sightseeing in Cities	36.8%
Cultural Heritage Sites	31.0%
Amusement/Theme Parks	27.1%
Casinos/Gambling	22.9%
Nightclubs/Dancing	20.4%
Art Gallery/Museum	19.7%
Concert/Play/Musical	18.7%
Visit Native Am. Comm.	18.4%
Camping/Hiking	16.5%
Water Sports/Sunbathing	15.1%
Guided Tours	14.6%
Golfing/Tennis	10.0%
Environ./Eco Excursions	9.2%
Ranch Vacations	6.9%
Attend Sports Event	6.6%
Ethnic Heritage Sites	3.9%
Cruises	2.2%
Snow Skiing	0.5%
Hunting/Fishing	0.3%



Source: U.S. Dept. of Commerce, Tourism Industries

Source: U.S. Dept. of Commerce, Tourism Industries

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TOTAL OVERSEAS AIR VISITORS TO GRAND CANYON PROFILE **

Demographics:

Age	
Average (years)	40.0
18-34 years	47.3%
35-54 years	34.2%
55+ years	18.4%

Origin Markets	
U.K.	14.6%
South Korea	12.4%
Japan	12.0%
France	11.2%
Germany	11.2%
Italy	6.6%
Netherlands	4.1%
South America	3.3%
Oceania	3.1%
Scandinavia	2.1%

Household Income	
< \$40,000	40.1%
\$40,000 - \$79,999	31.9%
\$80,000 - \$119,999	15.5%
\$120,000+	12.4%

Gender	
Men	57.8%
Women	42.2%

Frequent Travelers	
Repeat Visitor to the U.S.	62.3%
U.S. Trips last 12 Months	1.3
U.S. Trips last 5 Years	2.8
1 Trip	54.2%
2 - 5 Trips	33.0%
5+ Trips	12.7%

Party Composition	
Avg. Travel Party (mean)	4.4
Spouse	34.2%
Friends	32.4%
Family/Relatives	26.3%
Traveling Alone	16.1%
Group Tour	4.4%
Business Associates	2.1%
Adults Only	92.7%
Adults and Children	7.3%

Port of Entry	
Los Angeles	42.8%
Other	19.0%
San Francisco	11.6%
New York	4.7%
Miami	4.7%
Chicago	3.2%

Trip Behaviors:

Advance Trip Planning	
Advance Trip Decision	124.5 days
Advance Air Reservations	75 days
Use of Pre-Booked Lodging	62%

Accommodations	
Hotel/Motel	82.9%
Private Home	6.5%
Other	15.2%

Expenditures	
Avg. Spending Per Person Per Day	\$73

AZ Destinations Visited	
Phoenix	17.1%
Tucson	4.1%
Glen Canyon NP	3.9%

Use of Packages	
YES	26.9%
Air/Lodging	17.4%
Guided Tour	16.6%
Air/Lodging/Bus/Tour	9.8%
Air/Rental Car	7.7%
Air/Lodging/Bus	7.1%
Air/Lodging/Tour	6.3%
Air/Lodging/Rental Car	5.3%
Advance Package Booking	84.5 days
# of Nights Pre-paid as Part of a Package	10.3 nights

Length of Stay	
# of Nights in Arizona (mean)	2.2
# of Nights in U.S. (mean)	21.3

Information Sources	
Travel Agency	47.8%
Personal Computer	32.6%
Travel Guides	23.6%
Friends/Relatives	22.5%
Tour Company	15.9%
Airlines Directly	10.8%
State/City Travel Office	8.5%
Newspapers/Magazines	5.9%
Other	5.1%
Corporate Travel Dept.	4.8%

Transportation in U.S.	
Rented Auto	52.7%
Airlines in U.S.	36.1%
Company or Private Auto	27.4%
Taxi/Cab/Limousine	25.4%
City Subway/Tram/Bus	30.3%

Source: U.S. Dept. of Commerce, Tourism Industries

** Does not include visitors from Canada or those arriving by land from Mexico



TOTAL OVERSEAS AIR VISITORS TO GRAND CANYON PROFILE**

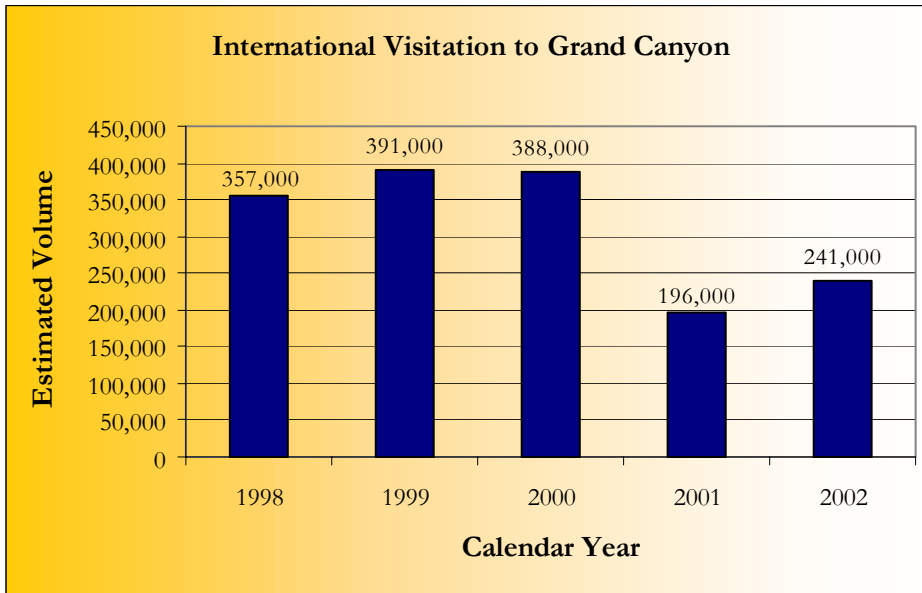
Purpose/Activities:

Visitation Volume	
Total Int'l Visitation (000s)	241

Purpose of Trip	
Leisure & VFR	88.7%
Leisure/Rec./Holidays	75.3%
Visit Friends/Relatives	6.7%
Other	0.7%
Business and Convention	17.2%
Business/Professional	4.4%
Convention/Conference	11.4%
Study/Teaching	1.5%

Other Destinations Visited	
# of States Visited	3.8
# of Destinations Visited	5.6
California	76.3%
Los Angeles	60.7%
San Francisco	38.8%
San Diego	13.4%
Yosemite N.P.	19.9%
Nevada	80.8%
Las Vegas	80.9%
Utah	38.0%
Bryce Canyon N.P.	17.3%
Colorado	16.2%
New York	6.4%
Florida	4.9%

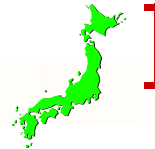
Leisure Activities	
Visit National Parks	89.5%
Shopping	89.2%
Dining in Restaurants	74.6%
Sightseeing in Cities	66.9%
Casinos/Gambling	64.2%
Visit Small Towns	58.1%
Amusement/Theme Parks	55.3%
Visit Historical Places	52.5%
Touring Countryside	44.6%
Cultural Heritage Sites	39.3%
Guided Tours	30.2%
Camping/Hiking	21.0%
Visit Native Am. Comm.	19.8%
Art Gallery/Museum	19.5%
Water Sports/Sunbathing	14.8%
Nightclubs/Dancing	14.0%
Concert/Play/Musical	13.3%
Ethnic Heritage Sites	9.2%
Environ./Eco Excursions	5.8%
Cruises	5.7%
Attend Sports Event	4.6%
Ranch Vacations	3.2%
Golfing/Tennis	3.0%
Snow Skiing	2.8%
Hunting/Fishing	2.1%



Source: U.S. Dept. of Commerce, Tourism Industries

Source: U.S. Dept. of Commerce, Tourism Industries

** Does not include visitors from Canada or those arriving by land from Mexico



TOTAL OVERSEAS AIR VISITORS FROM JAPAN PROFILE

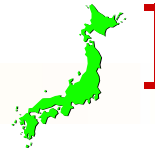
Demographics:

Age		Household Income		Party Composition	
Average (years)	42.5	< \$40,000	21.5%	Avg. Travel Party (mean)	3.0
18-34 years	28.1%	\$40,000 - \$79,999	29.3%	Traveling Alone	33.3%
35-54 years	50.1%	\$80,000 - \$119,999	33.2%	Spouse	24.2%
55+ years	21.7%	\$120,000+	16.1%	Business Associates	16.9%
Port of Entry		Gender		Friends	15.8%
Los Angeles	42.1%	Men	68.8%	Family/Relatives	9.9%
San Francisco	18.6%	Women	31.2%	Group Tour	7.8%
Other	15.1%	Frequent Travelers		Adults Only	99.5%
Detroit	8.0%	Repeat Visitor to the U.S.	73.6%	Adults and Children	0.5%
Seattle	6.2%	U.S. Trips last 12 Months	1.8		
Chicago	3.4%	U.S. Trips last 5 Years	5.8		
New York	1.1%	1 Trip	31.6%		
		2 - 5 Trips	41.6%		
		5+ Trips	26.8%		

Trip Behaviors:

Advance Trip Planning		Use of Packages		Information Sources	
Advance Trip Decision	53.6 days	YES	20.6%	Travel Agency	58.2%
Advance Air Reservations	28.6 days	Air/Lodging	15.7%	Personal Computer	31.2%
Use of Pre-Booked Lodging		Guided Tour	16.0%	Corporate Travel Dept.	18.5%
Accommodations		Air/Rental Car	0.9%	Tour Company	17.3%
Hotel/Motel	94.8%	Air/Lodging/Tour	11.1%	Friends/Relatives	15.8%
Private Home	5.1%	Air/Lodging/Rental Car	-	Travel Guides	15.5%
Other	2.8%	Air/Lodging/Bus	6.2%	Airlines Directly	10.6%
Expenditures		Air/Lodging/Bus/Tour	4.2%	Newspapers/Magazines	6.1%
Avg. Spending Per Person Per Day	\$114	Advance Package Booking	43.6 days	State/City Travel Office	3.5%
AZ Destinations Visited		# of Nights Pre-paid as Part of a Package	5.9 nights	Other	2.3%
Grand Canyon NP	51.1%	Length of Stay			
Phoenix	40.0%	# of Nights in Arizona (mean)	5.1		
Tucson	8.2%	# of Nights in U.S. (mean)	13.1		
Glen Canyon NP	2.5%	Transportation in U.S.			
		Airlines in U.S.	70.6%		
		Taxi/Cab/Limousine	52.0%		
		Company or Private Auto	41.7%		
		Rented Auto	39.2%		
		City Subway/Tram/Bus	17.9%		

Source: U.S. Dept. of Commerce, Tourism Industries



TOTAL OVERSEAS AIR VISITORS FROM JAPAN PROFILE

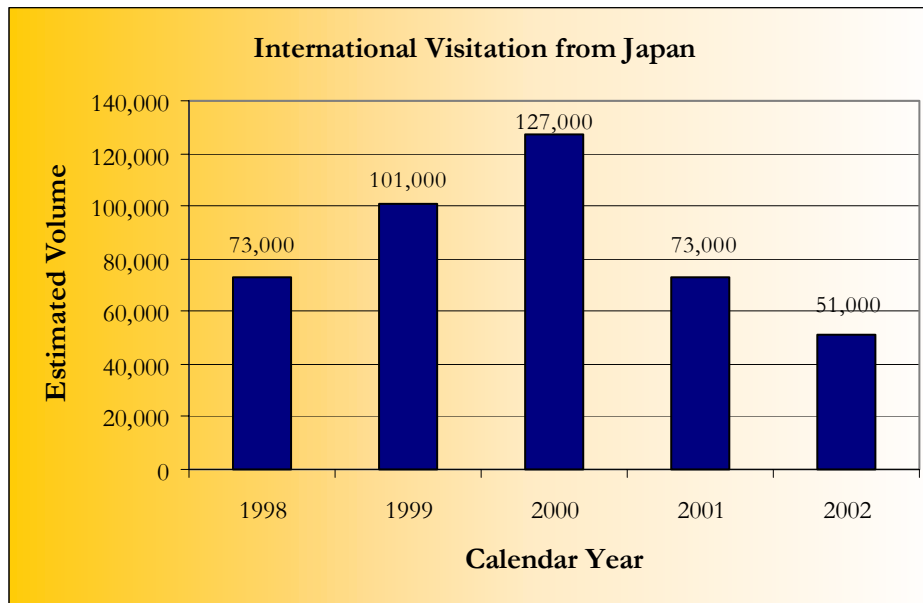
Purpose/Activities:

Visitation Volume	
Total Visitation from Japan (000s)	51

Purpose of Trip	
Leisure & VFR	70.9%
Leisure/Rec./Holidays	48.5%
Visit Friends/Relatives	12.8%
Other	0.8%
Business and Convention	32.4%
Business/Professional	20.0%
Convention/Conference	12.2%
Study/Teaching	5.6%

Other Destinations Visited	
# of States Visited	2.7
# of Destinations Visited	3.5
California	55.0%
Los Angeles	40.0%
San Francisco	21.8%
San Diego	5.0%
Yosemite N.P.	7.0%
Nevada	42.2%
Las Vegas	41.4%
Utah	8.1%
Bryce Canyon N.P.	-
Colorado	2.0%
New York	2.2%
Florida	2.2%

Leisure Activities	
Shopping	90.6%
Dining in Restaurants	86.0%
Visit Small Towns	53.3%
Visit National Parks	49.1%
Casinos/Gambling	35.1%
Guided Tours	31.3%
Amusement/Theme Parks	29.8%
Cultural Heritage Sites	23.7%
Visit Historical Places	22.3%
Touring Countryside	17.6%
Golfing/Tennis	12.4%
Attend Sports Event	12.2%
Visit Native Am. Comm.	10.9%
Camping/Hiking	8.9%
Environ./Eco Excursions	8.1%
Ethnic Heritage Sites	7.3%
Concert/Play/Musical	6.6%
Art Gallery/Museum	6.4%
Sightseeing in Cities	5.0%
Ranch Vacations	3.1%
Cruises	2.5%
Nightclubs/Dancing	2.2%
Water Sports/Sunbathing	2.2%
Snow Skiing	0.9%
Hunting/Fishing	-



Source: U.S. Dept. of Commerce, Tourism Industries

Source: U.S. Dept. of Commerce, Tourism Industries



TOTAL OVERSEAS AIR VISITORS FROM GERMANY PROFILE

Demographics:

Age		Household Income		Party Composition	
Average (years)	42.7	< \$40,000	22.5%	Avg. Travel Party (mean)	3.5
18-34 years	33.8%	\$40,000 - \$79,999	34.3%	Traveling Alone	35.0%
35-54 years	39.2%	\$80,000 - \$119,999	19.5%	Spouse	33.9%
55+ years	26.9%	\$120,000+	23.8%	Family/Relatives	25.3%
Port of Entry		Gender		Friends	13.1%
Other	33.6%	Men	64.2%	Group Tour	4.2%
Los Angeles	21.8%	Women	35.8%	Business Associates	1.2%
San Francisco	15.8%	Frequent Travelers		Adults Only	93.7%
Chicago	8.4%	Repeat Visitor to the U.S.	83.0%	Adults and Children	6.3%
New York	3.8%	U.S. Trips last 12 Months	2.1		
Cincinnati	2.8%	U.S. Trips last 5 Years	6.6		
Philadelphia	1.5%	1 Trip	26.4%		
		2 - 5 Trips	41.3%		
		5+ Trips	32.4%		

Trip Behaviors:

Advance Trip Planning		Use of Packages		Information Sources	
Advance Trip Decision	129.2 days	YES	18.5%	Personal Computer	36.4%
Advance Air Reservations	86.6 days	Air/Lodging	12.2%	Travel Agency	31.1%
Use of Pre-Booked Lodging	66.8%	Air/Rental Car	9.8%	State/City Travel Office	29.5%
Accommodations		Guided Tour	8.8%	Travel Guides	25.0%
Hotel/Motel	68.8%	Air/Lodging/Rental Car	6.8%	Friends/Relatives	24.4%
Private Home	27.0%	Air/Lodging/Tour	6.4%	Airlines Directly	22.2%
Other	17.7%	Air/Lodging/Bus	5.4%	Tour Company	16.0%
Expenditures		Air/Lodging/Bus/Tour	5.4%	Corporate Travel Dept.	11.1%
Avg. Spending Per Person Per Day	\$79	Advance Package Booking	142.2 days	Other	7.3%
AZ Destinations Visited		# of Nights Pre-paid as Part of a Package	16.6 nights	Newspapers/Magazines	5.0%
Phoenix	47.4%	Length of Stay		Transportation in U.S.	
Grand Canyon NP	35.7%	# of Nights in Arizona (mean)	6.5	Rented Auto	70.1%
Tucson	22.5%	# of Nights in U.S. (mean)	23	Airlines in U.S.	23.8%
Glen Canyon NP	1.6%			Company or Private Auto	20.6%
				Taxi/Cab/Limousine	13.7%
				City Subway/Tram/Bus	7.7%

Source: U.S. Dept. of Commerce, Tourism Industries



TOTAL OVERSEAS AIR VISITORS FROM GERMANY PROFILE

Purpose/Activities:

Visitation Volume	
Total Visitation from Germany (000s)	71
Purpose of Trip	
Leisure & VFR	89.6%
Leisure/Rec./Holidays	64.4%
Visit Friends/Relatives	14.3%
Other	0.4%
Business and Convention	25.2%
Business/Professional	16.3%
Convention/Conference	2.7%
Study/Teaching	1.6%

Other Destinations Visited	
# of States Visited	3.1
# of Destinations Visited	4.8
California	53.8%
Los Angeles	28.9%
San Francisco	30.9%
San Diego	14.1%
Yosemite N.P.	14.7%
Nevada	46.5%
Las Vegas	45.9%
Utah	33.0%
Bryce Canyon N.P.	12.6%
Colorado	15.7%
New York	6.6%
Florida	1.6%

Leisure Activities	
Shopping	85.1%
Dining in Restaurants	81.4%
Visit National Parks	71.6%
Touring Countryside	63.0%
Visit Historical Places	60.7%
Cultural Heritage Sites	48.9%
Visit Small Towns	47.0%
Casinos/Gambling	41.7%
Sightseeing in Cities	36.7%
Visit Native Am. Comm.	33.6%
Amusement/Theme Parks	33.1%
Camping/Hiking	25.6%
Water Sports/Sunbathing	24.5%
Art Gallery/Museum	21.3%
Guided Tours	21.2%
Concert/Play/Musical	13.2%
Nightclubs/Dancing	10.1%
Ethnic Heritage Sites	8.9%
Attend Sports Event	7.4%
Environ./Eco Excursions	6.6%
Ranch Vacations	3.5%
Golfing/Tennis	3.3%
Hunting/Fishing	1.3%
Snow Skiing	0.7%
Cruises	-

Source: U.S. Dept. of Commerce, Tourism Industries



Source: U.S. Dept. of Commerce, Tourism Industries



TOTAL OVERSEAS AIR VISITORS FROM UK PROFILE

Demographics:

Age		Household Income		Party Composition	
Average (years)	46.4	< \$40,000	18.9%	Avg. Travel Party (mean)	4.3
18-34 years	20.0%	\$40,000 - \$79,999	42.9%	Spouse	42.9%
35-54 years	47.2%	\$80,000 - \$119,999	14.7%	Traveling Alone	30.3%
55+ years	32.8%	\$120,000+	23.5%	Family/Relatives	23.1%
Port of Entry		Gender		Friends	14.6%
Los Angeles	28.4%	Men	59.7%	Business Associates	6.6%
Other	20.3%	Women	40.3%	Group Tour	2.3%
Chicago	16.1%	Frequent Travelers		Adults Only	93.4%
San Francisco	9.1%	Repeat Visitor to the U.S.	78.5%	Adults and Children	6.6%
Atlanta	6.1%	U.S. Trips last 12 Months	1.7		
New York	2.6%	U.S. Trips last 5 Years	5.4		
Miami	1.3%	1 Trip	28.6%		
		2 - 5 Trips	44.2%		
		5+ Trips	27.1%		

Trip Behaviors:

Advance Trip Planning		Use of Packages		Information Sources	
Advance Trip Decision	112.0 days	YES	24.4%	Travel Agency	49.9%
Advance Air Reservations	84.1 days	Air/Lodging/Bus	14.2%	Personal Computer	29.7%
Use of Pre-Booked Lodging	66.8%	Guided Tour	13.8%	Airlines Directly	15.6%
Accommodations		Air/Lodging	13.5%	Travel Guides	15.5%
Hotel/Motel	84.1%	Air/Rental Car	9.7%	Friends/Relatives	15.3%
Private Home	13.6%	Air/Lodging/Rental Car	7.3%	Tour Company	14.3%
Other	5.4%	Air/Lodging/Tour	5.5%	Newspapers/Magazines	2.3%
Expenditures		Air/Lodging/Bus/Tour	3.5%	Corporate Travel Dept.	2.3%
Avg. Spending Per Person Per Day	\$85	Advance Package Booking	185.9 days	State/City Travel Office	1.4%
AZ Destinations Visited		# of Nights Pre-paid as Part of a Package	14.1 nights	Other	1.4%
Tucson	43.9%	Length of Stay			
Grand Canyon NP	35.6%	# of Nights in Arizona (mean)	5.5		
Phoenix	15.0%	# of Nights in U.S. (mean)	18.9		
Glen Canyon NP	4.3%	Transportation in U.S.			
		Rented Auto	52.0%		
		Airlines in U.S.	35.9%		
		Taxi/Cab/Limousine	32.9%		
		Company or Private Auto	26.5%		
		City Subway/Tram/Bus	12.5%		

Source: U.S. Dept. of Commerce, Tourism Industries



TOTAL OVERSEAS AIR VISITORS FROM UK PROFILE

Purpose/Activities:

Visitation Volume	
Total Visitation from U.K. (000s)	88

Purpose of Trip	
Leisure & VFR	88.2%
Leisure/Rec./Holidays	66.2%
Visit Friends/Relatives	14.5%
Other	0.4%
Business and Convention	23.4%
Business/Professional	13.0%
Convention/Conference	4.2%
Study/Teaching	0.3%

Other Destinations Visited	
# of States Visited	3
# of Destinations Visited	4.5
California	60.4%
Los Angeles	32.2%
San Francisco	32.3%
San Diego	16.0%
Yosemite N.P.	8.7%
Nevada	50.7%
Las Vegas	50.5%
Utah	13.3%
Bryce Canyon N.P.	7.1%
Colorado	11.8%
New York	5.6%
Florida	5.1%

Leisure Activities	
Dining in Restaurants	92.9%
Shopping	82.7%
Visit National Parks	68.6%
Touring Countryside	64.2%
Visit Historical Places	57.6%
Sightseeing in Cities	53.8%
Visit Small Towns	50.1%
Cultural Heritage Sites	45.0%
Casinos/Gambling	44.6%
Amusement/Theme Parks	38.1%
Guided Tours	32.6%
Visit Native Am. Comm.	28.6%
Water Sports/Sunbathing	24.7%
Art Gallery/Museum	20.8%
Nightclubs/Dancing	19.5%
Camping/Hiking	17.2%
Concert/Play/Musical	12.6%
Ethnic Heritage Sites	12.6%
Attend Sports Event	8.6%
Golfing/Tennis	8.3%
Environ./Eco Excursions	8.1%
Ranch Vacations	6.8%
Cruises	5.3%
Snow Skiing	4.7%
Hunting/Fishing	1.5%



Source: U.S. Dept. of Commerce, Tourism Industries

Source: U.S. Dept. of Commerce, Tourism Industries



TOTAL OVERSEAS VISITORS FROM MEXICO PROFILE **

Demographics:

Age		Household Income		Party Composition	
Average (years)	40.5	< \$40,000	34.9%	Avg. Travel Party (mean)	3.2
18-34 years	43.5%	\$40,000 - \$79,999	29.7%	Traveling Alone	37.1%
35-54 years	40.4%	\$80,000 - \$119,999	9.2%	Family/Relatives	31.9%
55+ years	16.2%	\$120,000+	26.3%	Spouse	17.5%
Port of Entry		Gender		Friends	16.6%
Other	70.8%	Men	74.1%	Business Associates	5.0%
Houston	11.9%	Women	25.9%	Group Tour	0.2%
Dallas/Ft. Worth	7.1%	Frequent Travelers		Adults Only	86.8%
Los Angeles	5.0%	Repeat Visitor to the U.S.	94.5%	Adults and Children	13.2%
Miami	3.7%	U.S. Trips last 12 Months	4.5		
		U.S. Trips last 5 Years	18.1		
		1 Trip	6.8%		
		2 - 5 Trips	18.7%		
		5+ Trips	74.5%		

Trip Behaviors:

Advance Trip Planning		Use of Packages		Information Sources	
Advance Trip Decision	42.5 days	YES	8.4%	Travel Agency	43.4%
Advance Air Reservations	19.4 days	Air/Lodging	7.7%	Friends/Relatives	21.8%
Use of Pre-Booked Lodging	69.5%	Guided Tour	2.0%	Airlines Directly	20.1%
Accommodations		Air/Lodging/Tour	2.0%	Corporate Travel Dept.	9.0%
Hotel/Motel	76.1%	Air/Lodging/Bus	2.0%	Personal Computer	8.8%
Private Home	29.4%	Air/Lodging/Bus/Tour	2.0%	State/City Travel Office	7.9%
Other	1.6%	Air/Rental Car	1.6%	Tour Company	4.7%
Expenditures		Air/Lodging/Rental Car	0.9%	Other	4.5%
Avg. Spending Per Person Per Day	\$182	Advance Package Booking	26.8 days	Newspapers/Magazines	1.1%
AZ Destinations Visited		# of Nights Pre-paid as Part of a Package	7.4 nights	Travel Guides	0.4%
Phoenix	88.5%	Length of Stay		Transportation in U.S.	
Tucson	12.5%	# of Nights in Arizona (mean)	7.8	Rented Auto	38.9%
Grand Canyon NP	8.7%	# of Nights in U.S. (mean)	11.1	Company or Private Auto	35.4%
Glen Canyon NP	0.3%			Taxi/Cab/Limousine	28.8%
				Airlines in U.S.	23.9%
				City Subway/Tram/Bus	3.6%

Source: U.S. Dept. of Commerce, Tourism Industries

** Does not include visitors arriving by land from Mexico



TOTAL OVERSEAS VISITORS FROM MEXICO PROFILE **

Purpose / Activities:

Visitation Volume	
Total Visitation from Mexico (Air Only) (000s)	82

Purpose of Trip	
Leisure & VFR	71.3%
Leisure/Rec./Holidays	41.4%
Visit Friends/Relatives	18.4%
Other	0.2%
Business and Convention	38.5%
Business/Professional	27.2%
Convention/Conference	10.1%
Study/Teaching	0.2%

Other Destinations Visited	
# of States Visited	1.0
# of Destinations Visited	2.0
California	12.7%
Los Angeles	8.6%
San Francisco	2.7%
San Diego	4.0%
Yosemite N.P.	-
Nevada	16.4%
Las Vegas	15.3%
Utah	0.2%
Bryce Canyon N.P.	-
Colorado	11.8%
New York	2.4%
Florida	0.6%

Leisure Activities	
Shopping	91.4%
Dining in Restaurants	73.1%
Visit National Parks	26.0%
Visit Historical Places	23.8%
Visit Small Towns	21.6%
Nightclubs/Dancing	18.8%
Casinos/Gambling	15.1%
Amusement/Theme Parks	12.3%
Sightseeing in Cities	12.1%
Concert/Play/Musical	10.4%
Attend Sports Event	9.6%
Art Gallery/Museum	9.6%
Cultural Heritage Sites	7.0%
Touring Countryside	6.9%
Golfing/Tennis	5.9%
Visit Native Am. Comm.	5.8%
Guided Tours	5.7%
Water Sports/Sunbathing	5.0%
Environ./Eco Excursions	2.1%
Ethnic Heritage Sites	0.8%
Snow Skiing	0.8%
Hunting/Fishing	0.7%
Cruises	0.6%
Camping/Hiking	0.6%
Ranch Vacations	0.1%



Source: U.S. Dept. of Commerce, Tourism Industries

Source: U.S. Dept. of Commerce, Tourism Industries

** Does not include visitors arriving by land from Mexico



TOTAL OVERSEAS AIR VISITORS FROM FRANCE PROFILE 2000-2002

Demographics:

Age		Household Income		Party Composition	
Average (years)	43.45	< \$40,000	38.2%	Avg. Travel Party (mean)	4.1
18-34 years	29.3%	\$40,000 - \$79,999	35.6%	Spouse	46.9%
35-54 years	52.5%	\$80,000 - \$119,999	12.4%	Family/Relatives	34.8%
55+ years	18.2%	\$120,000+	13.7%	Friends	23.9%
Port of Entry		Gender		Traveling Alone	15.0%
Los Angeles	40.2%	Men	74.7%	Group Tour	6.2%
Other	19.1%	Women	25.3%	Business Associates	2.8%
Atlanta	12.0%	Frequent Travelers		Adults Only	81.5%
San Francisco	9.6%	Repeat Visitor to the U.S.	63.1%	Adults and Children	18.5%
New York	4.7%	U.S. Trips last 12 Months	1.8		
Chicago	2.5%	U.S. Trips last 5 Years	6.0		
Miami	1.2%	1 Trip	42.6%		
		2 - 5 Trips	27.5%		
		5+ Trips	29.7%		

Trip Behaviors:

Advance Trip Planning		Use of Packages		Information Sources	
Advance Trip Decision	107.9 days	YES	20.8%	Travel Agency	61.1%
Advance Air Reservations	68.3 days	Air/Lodging	16.0%	Personal Computer	25.0%
Use of Pre-Booked Lodging	62.2%	Air/Rental Car	12.1%	Travel Guides	23.5%
Accommodations		Guided Tour	9.3%	Airlines Directly	15.5%
Hotel/Motel	82.7%	Air/Lodging/Rental Car	8.8%	Tour Company	11.7%
Private Home	11.6%	Air/Lodging/Bus	6.2%	Friends/Relatives	11.4%
Other	9.9%	Air/Lodging/Bus/Tour	6.2%	Other	6.5%
Expenditures		Air/Lodging/Tour	5.9%	Newspapers/Magazines	3.7%
Avg. Spending Per Person Per Day	\$106	Advance Package Booking	102.5 days	Corporate Travel Dept.	0.6%
AZ Destinations Visited		# of Nights Pre-paid as Part of a Package	12.7 nights	State/City Travel Office	0.5%
Grand Canyon NP	51.7%	Length of Stay			
Phoenix	30.2%	# of Nights in Arizona (mean)	4.1		
Glen Canyon NP	10.5%	# of Nights in U.S. (mean)	17.9		
Tucson	5.5%	Transportation in U.S.			
		Rented Auto	72.2%		
		Airlines in U.S.	46.2%		
		Taxi/Cab/Limousine	24.0%		
		Company or Private Auto	16.8%		
		City Subway/Tram/Bus	16.6%		

Source: U.S. Dept. of Commerce, Tourism Industries



TOTAL OVERSEAS AIR VISITORS FROM FRANCE PROFILE 2000-2002

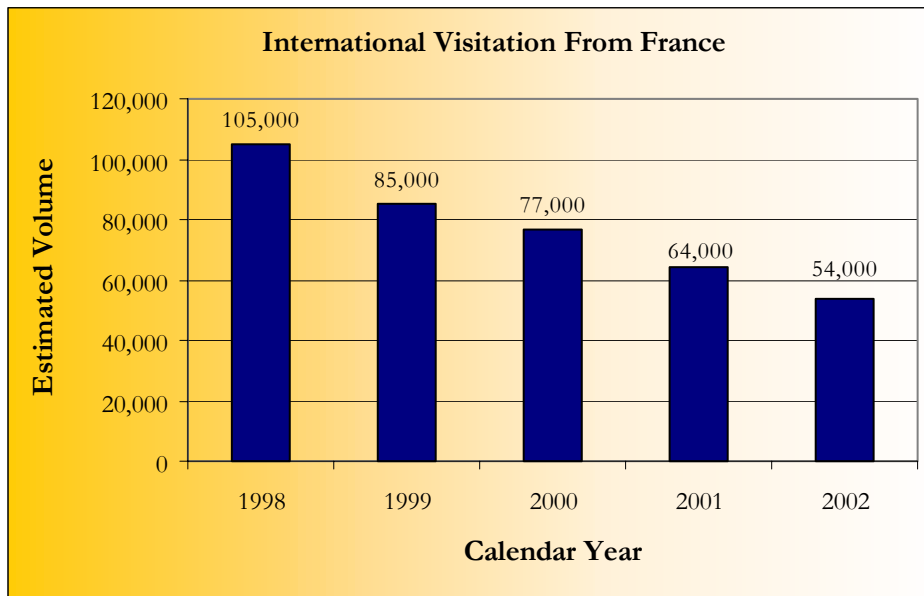
Purpose/Activities:

Visitation Volume	
Total Visitation from France (000s)	54

Purpose of Trip	
Leisure & VFR	92.5%
Leisure/Rec./Holidays	78.3%
Visit Friends/Relatives	11.7%
Other	-
Business and Convention	17.5%
Business/Professional	7.8%
Convention/Conference	2.0%
Study/Teaching	0.2%

Other Destinations Visited	
# of States Visited	3.6
# of Destinations Visited	5.3
California	71.2%
Los Angeles	41.1%
San Francisco	48.4%
San Diego	8.5%
Yosemite N.P.	16.3%
Nevada	70.3%
Las Vegas	69.9%
Utah	52.3%
Bryce Canyon N.P.	29.5%
Colorado	8.9%
New York	10.5%
Florida	9.0%

Leisure Activities	
Shopping	85.4%
Dining in Restaurants	83.3%
Visit National Parks	81.4%
Casinos/Gambling	64.6%
Sightseeing in Cities	63.5%
Visit Historical Places	63.0%
Visit Small Towns	51.5%
Touring Countryside	43.7%
Cultural Heritage Sites	41.8%
Amusement/Theme Parks	38.6%
Visit Native Am. Comm.	23.5%
Water Sports/Sunbathing	23.2%
Ethnic Heritage Sites	20.5%
Environ./Eco Excursions	19.8%
Art Gallery/Museum	17.9%
Camping/Hiking	15.2%
Guided Tours	11.4%
Concert/Play/Musical	8.2%
Ranch Vacations	6.5%
Nightclubs/Dancing	6.3%
Golfing/Tennis	3.7%
Attend Sports Event	3.6%
Cruises	3.1%
Hunting/Fishing	1.0%
Snow Skiing	0.3%



Source: U.S. Dept. of Commerce, Tourism Industries

Source: U.S. Dept. of Commerce, Tourism Industries



TOTAL OVERSEAS AIR VISITORS FROM ITALY PROFILE 2000-2002*

Demographics:

Age		Household Income		Party Composition	
Average (years)	37.0	< \$40,000	59.4%	Avg. Travel Party (mean)	4.2
18-34 years	51.1%	\$40,000 - \$79,999	27.2%	Spouse	52.2%
35-54 years	30.5%	\$80,000 - \$119,999	7.5%	Family/Relatives	26.2%
55+ years	18.5%	\$120,000+	5.9%	Friends	14.3%
Port of Entry		Gender		Traveling Alone	8.2%
Los Angeles	24.3%	Men	62.9%	Group Tour	7.7%
New York	21.2%	Women	37.1%	Business Associates	2.4%
Newark	15.4%	Frequent Travelers		Adults Only	90.2%
Other	13.5%	Repeat Visitor to the U.S.	53.5%	Adults and Children	9.8%
San Francisco	9.3%	U.S. Trips last 12 Months	1.5		
Miami	6.1%	U.S. Trips last 5 Years	3.6		
Chicago	2.6%	1 Trip	57.9%		
		2 - 5 Trips	31.2%		
		5+ Trips	10.9%		

Trip Behaviors:

Advance Trip Planning		Use of Packages		Information Sources	
Advance Trip Decision	81.0 days	YES	47.1%	Travel Agency	73.8%
Advance Air Reservations	49.7 days	Air/Lodging	38.6%	Personal Computer	21.4%
Use of Pre-Booked Lodging	77.4%	Guided Tour	27.6%	Travel Guides	17.6%
Accommodations		Air/Lodging/Tour	25.2%	Friends/Relatives	12.7%
Hotel/Motel	91.1%	Air/Lodging/Bus	21.5%	Airlines Directly	10.0%
Private Home	8.1%	Air/Lodging/Bus/Tour	20.9%	Newspapers/Magazines	6.1%
Other	4.8%	Air/Rental Car	19.0%	State/City Travel Office	6.0%
Expenditures		Air/Lodging/Rental Car	14.8%	Other	5.8%
Avg. Spending Per Person Per Day	\$88	Advance Package Booking	35.7 days	Tour Company	2.5%
AZ Destinations Visited		# of Nights Pre-paid as Part of a Package	11.2 nights	Corporate Travel Dept.	1.1%
Grand Canyon NP	51.6%	Length of Stay			
Phoenix	44.6%	# of Nights in Arizona (mean)	1.2		
Glen Canyon NP	15.8%	# of Nights in U.S. (mean)	14.1		
Tucson	6.8%	Transportation in U.S.			
		Rented Auto	59.9%		
		Airlines in U.S.	48.4%		
		City Subway/Tram/Bus	14.8%		
		Company or Private Auto	13.8%		
		Taxi/Cab/Limousine	12.0%		

* Denotes small sample size.

Source: U.S. Dept. of Commerce, Tourism Industries



TOTAL OVERSEAS AIR VISITORS FROM ITALY PROFILE 2000-2002

Purpose/Activities:

Visitation Volume	
Total Visitation from Italy (000s)	26

Purpose of Trip	
Leisure & VFR	92.4%
Leisure/Rec./Holidays	83.0%
Visit Friends/Relatives	5.4%
Other	0.2%
Business and Convention	14.9%
Business/Professional	8.9%
Convention/Conference	2.0%
Study/Teaching	0.5%

Other Destinations Visited	
# of States Visited	3.6
# of Destinations Visited	5.7
California	82.1%
Los Angeles	64.1%
San Francisco	46.9%
San Diego	17.0%
Yosemite N.P.	16.5%
Nevada	78.2%
Las Vegas	78.2%
Utah	37.8%
Bryce Canyon N.P.	27.9%
Colorado	2.8%
New York	29.0%
Florida	8.1%

Leisure Activities	
Visit National Parks	82.3%
Shopping	76.8%
Visit Small Towns	75.7%
Dining in Restaurants	70.1%
Sightseeing in Cities	62.1%
Visit Historical Places	48.6%
Amusement/Theme Parks	43.8%
Casinos/Gambling	40.8%
Visit Native Am. Comm.	36.9%
Guided Tours	35.6%
Art Gallery/Museum	29.4%
Cultural Heritage Sites	24.9%
Touring Countryside	22.8%
Water Sports/Sunbathing	12.9%
Environ./Eco Excursions	10.6%
Nightclubs/Dancing	9.3%
Camping/Hiking	8.1%
Cruises	5.9%
Ethnic Heritage Sites	4.2%
Concert/Play/Musical	3.7%
Ranch Vacations	3.1%
Golfing/Tennis	3.0%
Hunting/Fishing	1.9%
Attend Sports Event	0.5%
Snow Skiing	0.2%

Source: U.S. Dept. of Commerce, Tourism Industries



Source: U.S. Dept. of Commerce, Tourism Industries



TOTAL OVERSEAS VISITORS FROM CANADA PROFILE

Demographics:

Age	
Average (years)	48
2-34 years	13.39%
35-54 years	32.39%
55+ years	46.18%

Mode of Entry	
Auto	34.08%
Airplane	63.68%
Bus	1.37%
Other	.47%
Via US	.43%

Gender	
Men	45.86%
Women	46.05%

Visitors by Province	
Ontario	34.67%
BC & Territories	29.17%
Alberta	21.67%
Quebec	6.05%
Manitoba	3.85%
Saskatchewan	3.42%
Atlantic Canada	1.17%

Party Composition	
Avg. Travel Party (mean)	1.94 persons
Adults Only	70.98%
Adults and Children	7.39%
Other	21.67%

Travel Party Size	
1 person	16.18%
2 persons	58.15%
3 persons	8.01%
4 persons	10.72%
5-9 persons	4.83%
10 + persons	2.08%

Trip Behaviors:

Length of Stay	
# of Nights in Arizona	17.64
1-3 nights	17.27%
4-9 nights	48.13%
10-20 nights	15.93%
21 + nights	18.70%

Accommodations	
Hotel/Motel	34.63%
Private Home	20.65%
Combination of Hotel/Motel	10.64%
Other	28%
N/A	6.09%

Visit Spending Range	
\$0 - \$299 CDN *	.95%
\$300 - \$1,999 CDN *	23.24%
\$2,000 - \$7,999 CDN*	57.07%
\$8,000 + CDN *	18.75%
* Annualized conversion rate for 2002 - \$1 US = 1.57036 CDN	

Visitation Volume	
Total Visitation from Canada (000s)	255

Purpose of Trip	
Leisure & VFR	85.91%
Leisure/Rec./Holidays	63.53%
Visit Friends/Relatives	21.28%
Other	1.10%
Business and Convention	14.09%
Business/Professional	5.54%
Convention/Conference	8.24%
Study/Teaching	.31%

Source: Statistics Canada