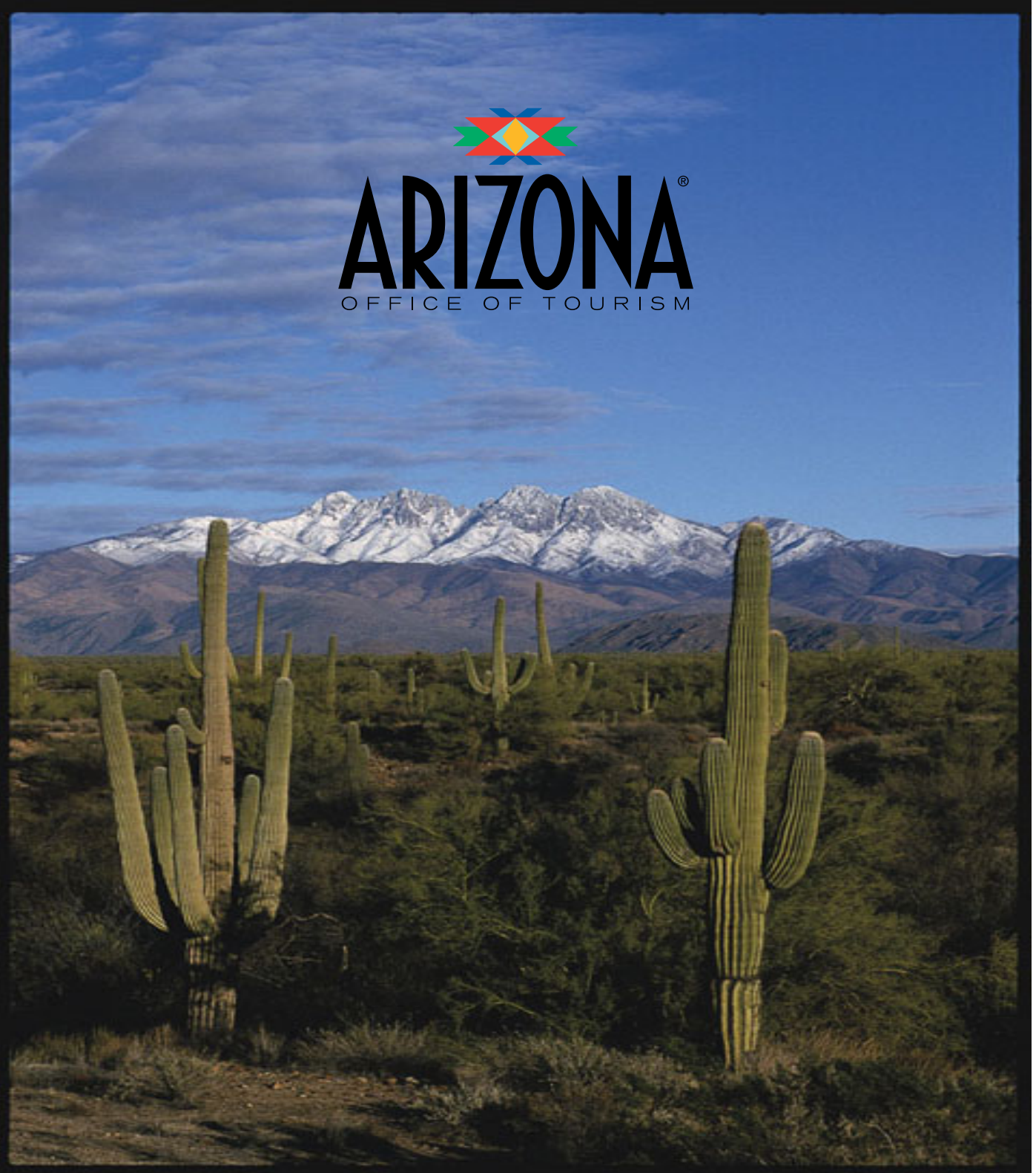


Arizona Tourism Statistical Report 2003



ARIZONA[®]
OFFICE OF TOURISM



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Total Overnight Visitor Profile – 2002

Total Number of Domestic Visitors	27.8 million
Average Length of Stay	4.1 days
Average Travel Party Size	2 People
Average Annual Household Income	\$72,000
Average Age of Head of Household	45
Daily Expenses Per Person	\$106.26
Total Spending Per Person	\$435.67
Direct Spending	\$12.14 billion

Information in this report was provided by:

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 Park Service
7. Smith Travel Research
8. U.S. Department of Commerce, Tourism Industries

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2003 Arizona Statistical Report

Arizona Quick Facts

State Slogan:	"The Grand Canyon State"
State Motto:	<i>Ditat Deus, God Enriches</i>
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: 2002 5,472,750

Population By County	
Apache	70,105
Cochise	121,040
Coconino	122,770
Gila	53,015
Graham	34,490
Greenlee	8,605
La Paz	20,365
Maricopa	3,296,250
Mohave	166,465
Navajo	101,615
Pima	890,545
Pinal	192,395
Santa Cruz	39,840
Yavapai	180,260
Yuma	169,760

Source: Arizona Department of Commerce

Top Tourist Attractions	2003 Attendance	Top Natural Tourist Attractions	2003 Attendance
1. Bank One Ballpark	2,615,857	1. Grand Canyon National Park	4,124,900
2. Tempe Town Lake	2,500,000	2. Saguaro National Park	3,437,077
3. London Bridge	1,141,563	3. South Mountain Park	2,000,000
4. America West Arena	1,120,000	4. Glen Canyon National Rec. Area	1,896,796
5. The Phoenix Zoo	1,500,000	5. Lake Mead National Rec. Area	1,661,889
6. Arizona State University Sun Devil Stadium	620,000	6. Coronado Nat. Forest & Sabino Canyon	1,500,000
7. WestWorld of Scottsdale	600,454	7. Canyon de Chelly	883,043
8. Rawhide Western Town & Steakhouse	600,000	8. Montezuma Castle Nat. Monument	634,965
9. Tombstone	500,000	9. Petrified Forest Nat. Park	586,364
10. Arizona-Sonora Desert Museum	460,000	10. Lake Pleasant Regional Park	542,470

Introduction

The *Arizona Tourism Statistical Report 2003* 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.



Native American Dancer at Casa Grande, AZ



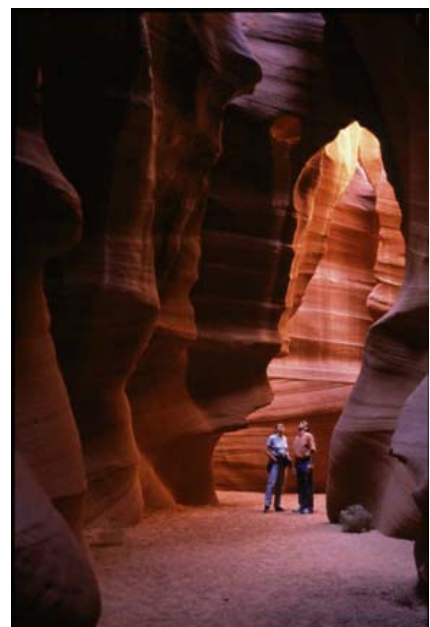
The Westin La Paloma Resort, Tucson, AZ

"...purpose of the report is to develop and disseminate tourism-related statistics that provide a broad overview of Arizona's tourism industry over time..."

Executive Summary

- In 2003, Arizona hosted a record 27.8 million domestic overnight visitors, up 3.6 percent from 2002 when the state hosted 26.9 million domestic overnight visitors. Nationally, the total overnight travel volume increased 5.4 percent.
- Direct Spending among domestic overnight travelers to Arizona rose 1 percent, from \$12.01 billion in 2002 to \$12.14 billion in 2003 setting a record for overall direct spending by visitors.
- From 2002 to 2003, average party size among total domestic overnight travelers stayed at 2 persons per trip. In 2003, couples made up 38 percent of all visiting parties increasing 3

- percent from 2002.
- The average Arizona domestic overnight visitor spent \$106.26 per person per day in 2003, down slightly from \$108.49 in 2002.
- The majority of travelers, 40 percent, came to Arizona mainly to visit friends and relatives. But 18 percent came to visit for a getaway weekend, which increased 5 percent from 2002. This follows the travel trend of shorter trips in 2003.
- Arizona experienced a 15 percent decline in overseas visitors in 2003, while the U.S. saw a decline of 4%.



Antelope Canyon, AZ



Arizona Lodging Performance

During 2003, the lodging industry started to make a recovery in Arizona. All of the five lodging indicators: occupancy, average daily room rate (ADR), revenue generated per available room (RevPAR), demand, and supply increased in 2003. Arizona's occupancy rate outperformed the nation by growing 2.7 percent, up to 59.9 percent, while the nation's occupancy rate only increased by 0.2 percent to 59.2 percent. Statewide, Arizona grew 0.5 percent in Average Daily Rate, up to \$82.94 from \$82.53 in 2002. RevPAR was up 3.3 percent in 2003 to \$49.69.

Directly related to the increased numbers, both demand and supply

statewide increased during 2003, up 4.9 percent and 2.3 percent, respectively. Statewide demand was 21.5 million rooms and statewide supply was 36.0 million rooms.

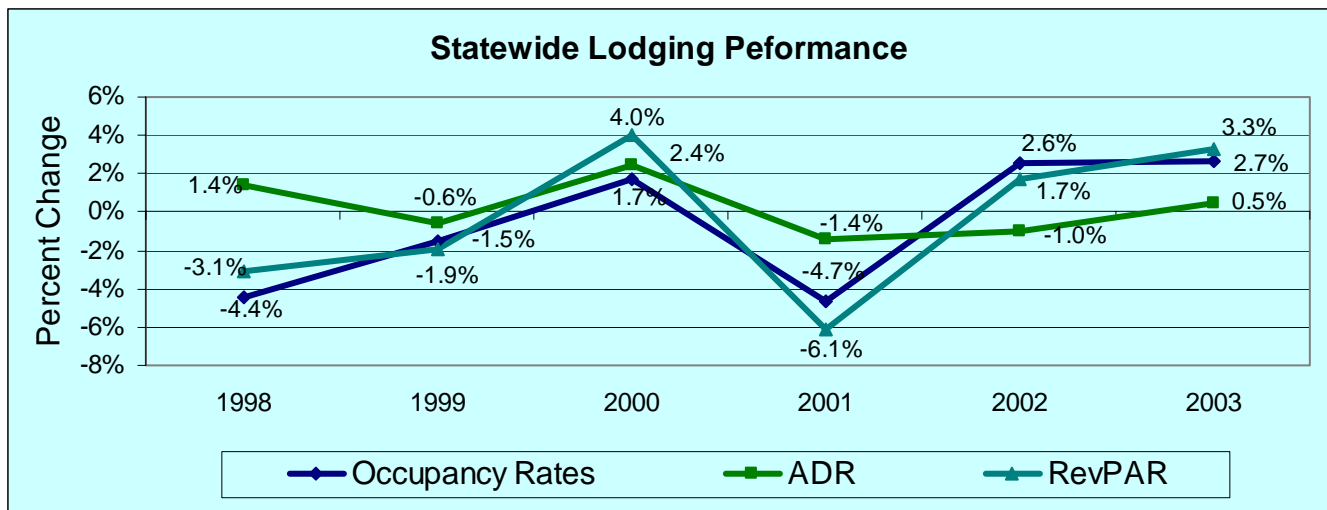
Metro Phoenix occupancy rates had a strong year, rising 3.5 percent, to 59.7 percent from 57.7 percent in 2002. Average Daily Rates increased by 0.7 percent, up to \$94.12 from \$93.48 in 2002. RevPAR also increased in 2003, up 4.2 percent to \$56.18.

Metro Tucson occupancy rates increased by 4.9 percent, up to 61.7 percent from 58.8 percent in 2002. Average Daily Rates declined for the

second year in a row, this time by 4.4 percent, down to \$76.69 from \$80.25 in 2002. Similar to the metro Phoenix area, RevPAR for Metro Tucson increased by 0.2 percent, up to \$47.32 in 2003. Room demand increased by 4.8 percent, while room supply stayed flat.

The non-metro areas of Arizona experienced slight gains in all five indicators. Occupancy was up 0.7 percent from 2002, and RevPAR was up 2.4 percent from 2002. Average Daily Rates were up slightly to \$64.70, up from \$63.62 in 2002. Rooms demanded increased by 1.8 percent, from 6.16 million in 2002 to 6.27 million in 2003.

	Average Daily									
	Occupancy		Rate		RevPAR		Demand		Supply	
	2003	% Change	2003	% Change	2003	% Change	2003	% Change	2003	% Change
United States	59.2%	0.2%	\$83.28	-0.1%	\$49.34	0.2%	959.9 mil	1.6%	1.62 bil	1.9%
Mountain Region	61.4%	0.8%	\$83.79	0.6%	\$51.43	1.4%	118.8 mil	2.1%	193.6 mil	1.2%
State of Arizona	59.9%	2.7%	\$82.94	0.5%	\$49.69	3.3%	21.5 mil	4.9%	36.0 mil	2.3%
Metro Phoenix	59.7%	3.5%	\$94.12	0.7%	\$56.18	4.2%	12.0 mil	7.1%	20.1 mil	3.1%
Metro Tucson	61.7%	4.9%	\$76.69	-4.4%	\$47.32	0.2%	3.27 mil	4.8%	5.3 mil	0.0%
Non-Metro AZ	59.5%	0.7%	\$64.70	1.7%	\$38.47	2.4%	6.27 mil	1.8%	10.5 mil	1.0%



Source: Smith Travel Research



Arizona Lodging Performance

2003 County Lodging Performance

	Occupancy	Room Rate	RevPAR	Demand	Supply
Apache	52.6%	\$68.77	\$36.14	172,442	328,135
% Change from 2002	13.4%	0.7%	14.0%	13.2%	0%
Cochise	63.2%	\$51.11	\$32.28	560,305	886,984
% Change from 2002	-3.8%	0.2%	-1.2%	-1.4%	2.6%
Coconino	58.2%	\$65.07	\$37.86	2,201,007	3,782,780
% Change from 2002	2.1%	0.9%	2.9%	1.5%	-0.5%
Gila	56.7%	\$56.31	\$31.92	219,316	386,900
% Change from 2002	-1.9%	2.2%	0.2%	-2.0%	0%
Graham	51.8%	\$57.25	\$29.65	71,445	137,970
% Change from 2002	-6.5%	4.1%	-2.7%	-6.6%	0%
Greenlee	n/a	n/a	n/a	n/a	n/a
% Change from 2002	n/a	n/a	n/a	n/a	n/a
La Paz	n/a	n/a	n/a	n/a	n/a
% Change from 2002	n/a	n/a	n/a	n/a	n/a
Maricopa	60.1%	\$99.91	\$60.04	11,788,429	19,618,280
% Change from 2002	3.4%	0.9%	4.4%	6.9%	3.3%
Mohave	59.1%	\$51.08	\$30.18	904,639	1,530,962
% Change from 2002	-5.3%	8.2%	2.4%	-4.2%	1.1%
Navajo	54.6%	\$55.53	\$30.30	630,603	1,155,590
% Change from 2002	-1.8%	3.3%	1.3%	-0.9%	1.0%
Pima	61.2%	\$78.93	\$48.33	3,249,890	5,307,100
% Change from 2002	2.9%	-2.0%	0.8%	2.9%	0%
Pinal	58.3%	\$54.51	\$31.75	332,749	571,225
% Change from 2002	-7.0%	1.7%	-5.5%	-7.1%	0%
Santa Cruz	64.4%	\$67.54	\$43.5	214,624	333,245
% Change from 2002	5.6%	-4.0%	1.3%	5.5%	0%
Yavapai	64.3%	\$93.07	\$59.85	1,072,888	1,668,436
% Change from 2002	2.1%	2.3%	4.4%	3.2%	1.2%
Yuma	67.0%	\$56.79	\$38.06	576,541	860,305
% Change from 2002	5.7%	2.1%	8.0%	5.8%	0%

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



Arizona Tourism Related Tax Revenues

In 2003, tourism sectors (lodging, restaurant/bar, retail, and amusements) generated more than \$435 million in tax revenue, a 4.9 percent increase over 2002. A positive sign that people are traveling and the economy is not only stable, but gaining ground. In all tourism sectors, tax revenues out performed 2002 levels, by as much as 5.3%.

Both restaurant/bar and

retail categories shared the largest increase in tourism tax revenues, up 5.3 percent from 2002. The retail category drew in \$249 million, while the restaurant/bar category generated over \$91 million. Another strong gain was in the lodging category, up 3.9 percent from 2002, with total tourism tax revenues of more than \$91.3 million.

"In 2003, tourism sectors (lodging, restaurant/bar, retail, and amusements) generated more than \$435 million in tax revenue, a 4.9 percent increase over 2002."

Arizona Tourism Related Tax Revenues			
	2003	2002	% Change
Hotel/Motel	\$91,393,280	\$88,002,533	3.9%
Restaurant/Bar	\$91,386,645	\$86,794,122	5.3%
Retail	\$249,942,254	\$237,452,048	5.3%
Amusements	\$2,857,911	\$2,840,866	0.6%
Total	\$435,580,090	\$415,089,569	4.9%



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

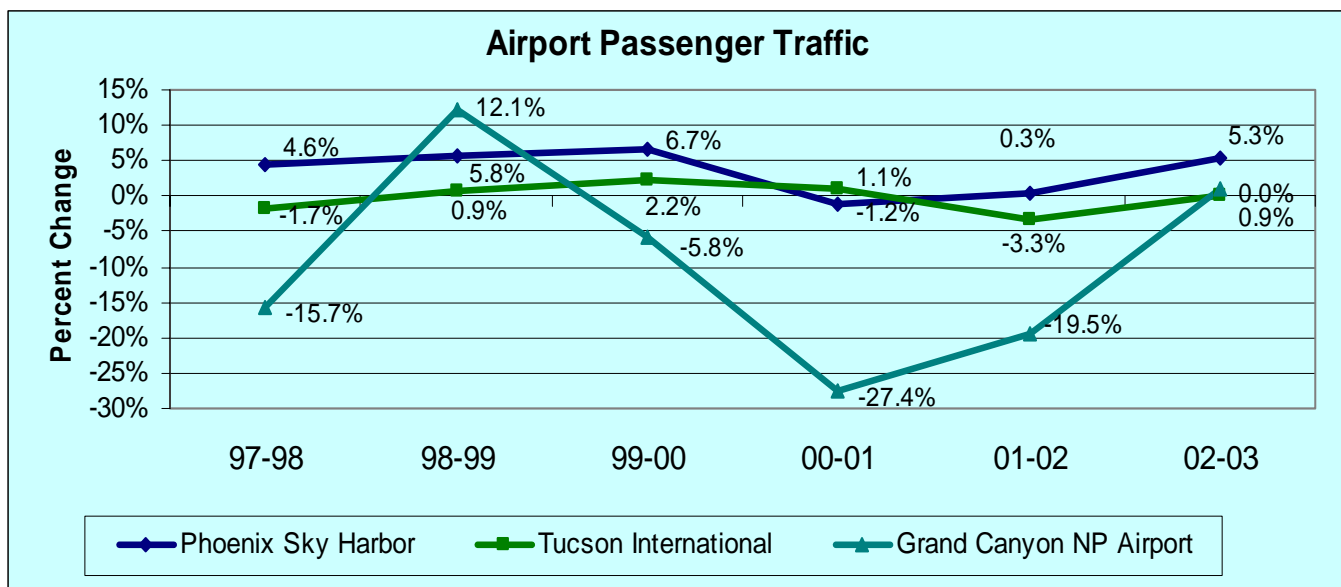
Please prepare for takeoff. In 2003, the airline industry showed a strong performance in Arizona. Even though leisure travel trips continued to be shorter, closer to home, and drive destinations, Phoenix Sky Harbor became the 6th busiest airport in the world for passenger traffic. In 2003, more than 41 million passengers passed through Arizona's airports, an increase of 4.8 percent from the previous year.

Sky Harbor experienced the strongest increase of 5.3 percent with over 37 million people passing through its gates. The Yuma International Airport increased 4.4 percent from the previous year, tracking 108,187 passengers. The Grand Canyon National Park Airport increased slightly, 0.9 percent to 664,932 passengers. The Tucson International Airport stayed flat this year with 3,508,868 visitors.

"In 2003, more than 41 million passengers passed through Arizona's airports, an increase of 4.8 percent from the previous year."

Arizona Airport Passenger Traffic			
	2003	2002	% Change
Grand Canyon	664,932	658,889	0.9%
Phoenix Sky Harbor	37,423,502	35,534,198	5.3%
Tucson International	3,508,868	3,507,883	0.0%
Yuma International	108,187	105,639	2.4%
Total	41,705,489	39,806,609	4.8%

Source: Information supplied by the airports themselves



Source: Information supplied by the airports themselves



Arizona State Parks Visitation

The Arizona State Parks visitation was down 3.9% for the entire year. There are 28 state parks throughout the state and 21 of them decreased in visitation rates for this year. There were large impacts due to the increased drought in 2003; water levels at lakes were low and streams/rivers were dry. Also, because of the drought, there were heavy fire restrictions throughout the state at a majority of recreation areas for a large portion of the year.

The largest increase of visitation was at Slide Rock Park just outside of Sedona, increasing 31.3 percent with visitation totaling 229,770. The Tonto National Bridge in the Central Eastern part of the state increased 12.7 percent and Fool Hollow Lake near Show Low had

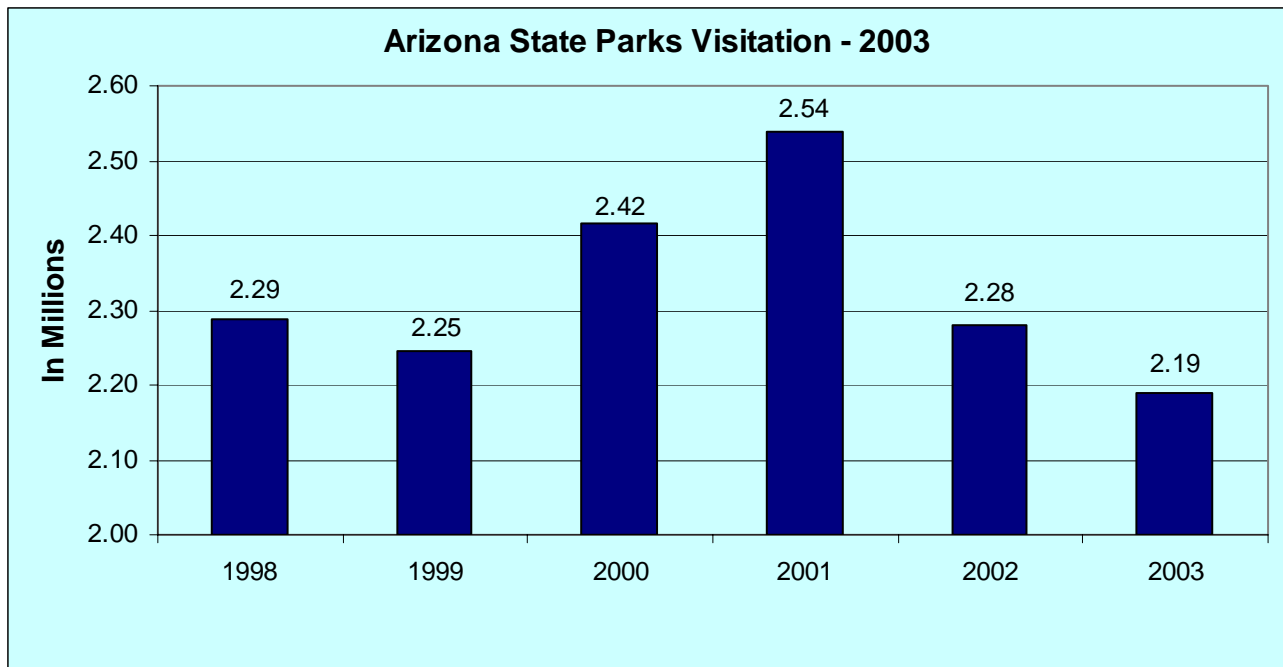
visitation at 69,240, which increased 9.8 percent from the previous year.

Visitation at Alamo Lake in the Western part of the state decreased by 28.3 percent and Roper Lake, next to Safford, dropped 23.3 percent from the previous years.

"The biggest increase of visitation was at Slide Rock Park just outside of Sedona, increasing 31.3 percent with visitation totaling 229,770."

Top 5 Most Visited State Parks	
State Park	2003
Lake Havasu	369,317
Slide Rock	229,770
Patagonia Lake	202,230
Kartchner Caverns	183,976
Catalina	119,698

Source: Arizona State Parks



Source: Arizona State Parks



Arizona State Parks Visitation

	2003	2002	% Change
All Parks	2,193,417	2,281,358	-3.9%
Alamo Lake	51,487	71,762	-28.3%
Boyce Thompson	70,949	84,944	-16.5%
Buckskin Mountain	94,461	93,867	0.6%
Catalina	119,698	116,168	3.0%
Cattail Cove	109,280	109,645	-0.3%
Dead Horse Ranch	87,216	103,215	-15.5%
Fool Hollow Lake	69,240	63,083	9.8%
Fort Verde	15,282	17,007	-10.1%
Homolovi	18,692	20,358	-8.2%
Jerome	47,235	54,440	-13.2%
Kartchner Caverns	183,976	191,661	-4.0%
Lake Havasu	369,317	407,759	-9.4%
Lost Dutchman	67,765	76,664	-11.6%
Lyman Lake	23,745	23,153	2.6%
McFarland	3,208	3,542	-9.4%
Oracle	8,778	10,239	-14.3%
Patagonia Lake	202,230	207,235	-2.4%
Picacho Peak	58,346	60,575	-3.7%
Red Rock	70,782	78,437	-9.8%
Riordan Mansion	23,166	23,432	-1.1%
Roper Lake	36,703	44,601	-17.7%
San Rafael	0	0	0.0%
Slide Rock	229,770	175,036	31.3%
Tombstone Courthouse	49,061	63,935	-23.3%
Tonto Natural Bridge	96,663	85,751	12.7%
Tubac Presidio	17,121	19,200	-10.8%
Yuma Crossing	13,479	14,116	-4.5%
Yuma Prison	55,767	61,533	-9.4%

Source: Arizona State Parks



Arizona National Parks Visitation

Visitation at the Arizona National Parks was up 0.9 percent in 2003, with 11,542,278 people going through the gates at the 21 parks throughout the state. Some significant increases occurred in the northern region: Canyon de Chelly National Monument increased 14.3 percent, Navajo National Monument was up 21.7 percent, and Wupatki National Monument was up 12.6 percent. Only 4 parks, Chiricahua, Glen Canyon, Hubbell Trading Post, and Organ Pipe Cactus had lower visitation in 2003 than 2002.

The Grand Canyon had the highest number of visitors at 4,124,900 increasing 3.1 percent from the previous year. Lake Mead followed with 1,661,889 visitors, staying relatively the same over 2002 and Glen Canyon dropped 9.5 percent, and welcoming 1,457,457 visitors in 2003.

Top 5 Most Visited National Parks	
National Park	2003
Grand Canyon NP	4,124,900
Lake Mead NRA	1,661,889
Glen Canyon NRA	1,457,457
Canyon de Chelly NM	883,043
Montezuma Castle NM	637,024

Source: National Park Service

"Only 4 parks, Chiricahua, Glen Canyon, Hubbell Trading Post, and Organ Pipe Cactus had lower visitation in 2003 than 2002."



Source: National Park Service



Arizona National Parks Visitation

	2003	2002	% Change
All Arizona Parks	11,542,278	11,441,435	0.9%
Canyon de Chelly NM	883,043	772,620	14.3%
Casa Grande NM	85,803	85,375	0.5%
Chiricahua NM	44,976	67,040	-32.9%
Coronado NM	89,309	87,311	2.3%
Fort Bowie NHS	8,445	8,290	1.9%
Glen Canyon NRA**	1,457,457	1,610,334	-9.5%
Grand Canyon NP	4,124,900	4,001,974	3.1%
Hubbell Trading Post NHS	163,883	196,874	-16.8%
Lake Mead NRA**	1,661,889	1,656,626	0.3%
Montezuma Castle NM	637,024	643,645	-1.0%
Navajo NM	73,380	60,282	21.7%
Organ Pipe Cactus NM	271,517	294,434	-7.8%
Petrified Forest NP	586,245	574,898	2.0%
Pipe Spring NM	56,530	54,734	3.3%
Saguaro NP	635,506	615,045	3.3%
Sunset Crater Volcano NM	159,073	150,664	5.6%
Tonto NM	59,216	57,328	3.3%
Tumacacori NHP	52,296	48,438	8.0%
Tuzigoot NM	115,216	112,167	2.7%
Walnut Canyon NM	110,411	106,962	3.2%
Wupatki NM	266,159	236,394	12.6%

**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 2003, Arizona hosted 27.8

million domestic overnight visitors, up 3.6 percent from 2002 when Arizona hosted 26.9 million domestic overnight visitors. U.S. domestic overnight travel volume increased also, up 5.4 percent.

The increase of total domestic overnight person-trips was driven by the leisure segment, which

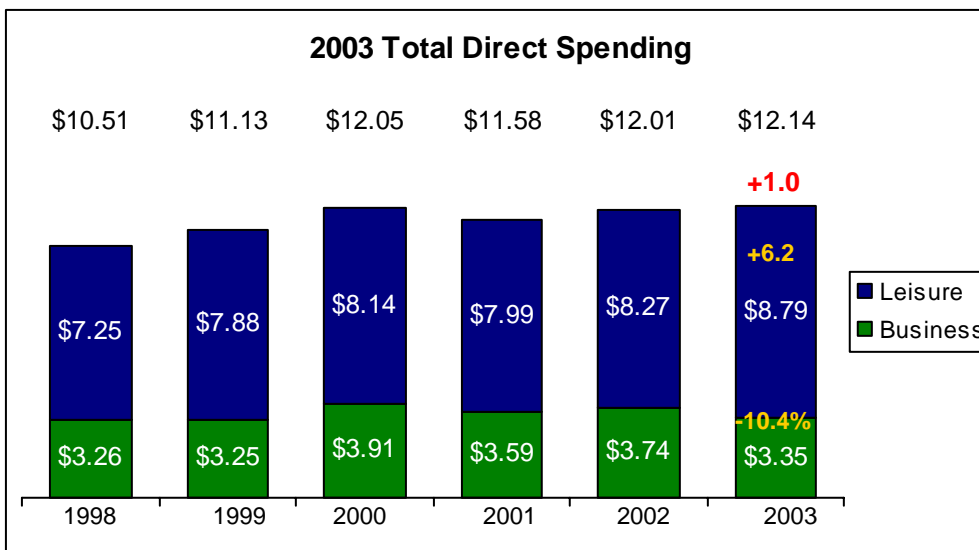
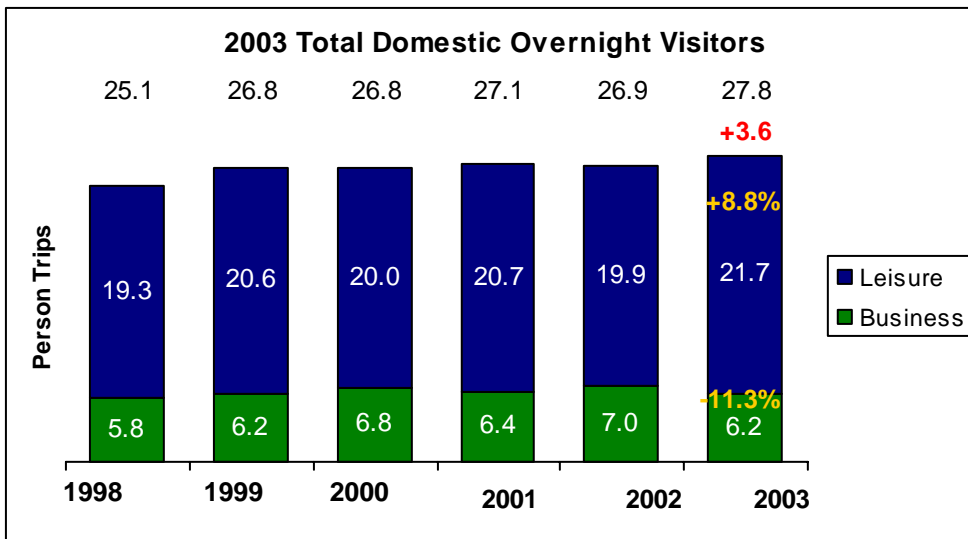
increased 8.8 percent, from 19.9 million in 2002 to 21.7 million in 2003. Arizona outpaced the U.S. domestic overnight leisure travel segment, which increased by 7.0 percent.

The 8.8 percent increase in total domestic leisure overnight travel volume was driven by the increase of domestic overnight resident leisure travel, up 44.8 percent to 6.1 million in 2003 from 4.2 million in 2002.

Domestic overnight business person-trip volume decreased by 11.3 percent, from 7.0 million in 2002 to 6.2 million in 2003. The U.S. domestic overnight business travel segment stayed flat, inching up 0.1 percent.

From 2002 to 2003, average party size among total domestic overnight travelers stayed the same at 2 people per trip.

Spending per person fell slightly, but total direct spending among domestic overnight travelers rose 1.0 percent, from \$12.01 billion in 2002 to \$12.14 billion in 2003. The average domestic overnight visitor spent \$106 per person per day in 2003, down slightly from \$108 in 2002. Domestic overnight business travelers spent the most per person per day, although this spending level declined from \$140 in 2002 to \$136 in 2003. Domestic overnight leisure travelers spent an average of \$98 per person per day in 2003 staying the same from 2002.



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



Total Domestic Overnight Visitor Profile

2003 Quick Facts: Visitor Profile	
Estimated Volume	27.8 Million
Average Length of Stay	4.1 days
Average Party Size	2
Spending Per Person Per Day	\$106.26
Total Direct Spending	\$12.14 Billion

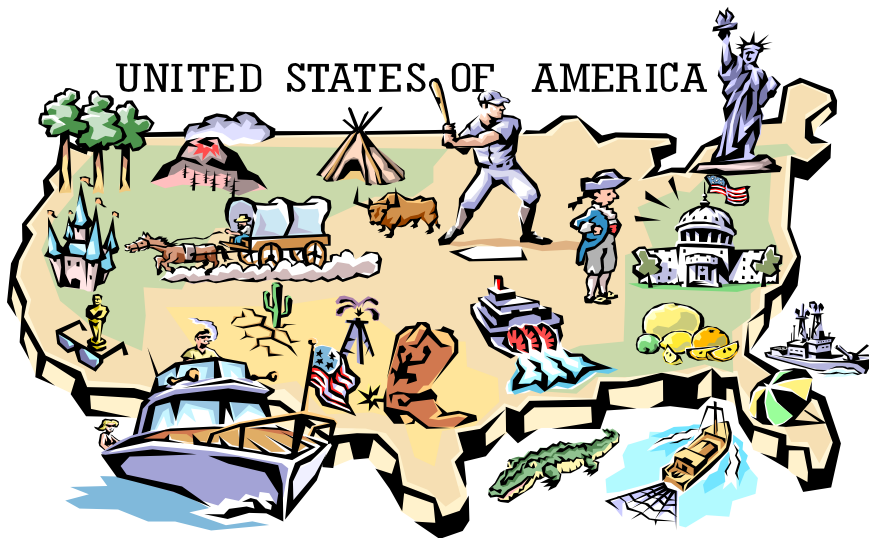
In 2003, nearly 70 percent of domestic overnight visitors to Arizona originated from southwestern U.S. states, including Arizona. Top origin markets for domestic overnight visitors to Arizona include California and Arizona itself.

Domestic overnight travel party volume in Arizona rose 27.5 percent, from 11.1 million in 2002 to 14.2 million in 2003.

There were no declines in average stay length across Arizona's domestic overnight segments from 2002 to 2003. The share of couples traveling to Arizona rose from 35 percent in 2002 to 38 percent in 2003. Family travel stayed the same from year to year, making up 23 percent of travel party composition.

Origin State	
Arizona	35.6%
California	27.0%
Nevada	3.0%
Illinois	2.8%
Texas	2.7%

Origin DMA	
Phoenix	27.7%
Los Angeles	17.4%
Tucson (Sierra Vista)	7.8%
San Diego	3.1%
Las Vegas	2.6%



Demographics:

Household Income	
Average HH Income	\$72,000
<\$25,000	8%
\$25K-\$49,999	28%
\$50K-\$74,999	21%
\$75,000+	43%

Education	
No College	28%
Attended College	36%
College Degree	22%
Post-Grad. Degree	14%

Life Stage	
18-34/No children	12%
18-34/Children	19%
35-54/No children	23%
35-54/Children/<\$50K	6%
35-54/Children/\$50K+	14%
55+/No children/<\$50K	8%
55+/No children/\$50K+	16%

Age	
Average (years)	45.0
18-34 years	31%
35-54 years	44%
55+ years	25%

Occupation	
Manager, Prof.	36%
Tech., Sales, Admin.	20%
Service	6%
Other	14%
Retired	11%
Not Employed	13%

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



Total Domestic Overnight Visitor Profile

Trip Behaviors:

Purpose of Stay	
Business	22%
Leisure	78%

Accommodations	
Non-Paid (Net)	37%
Hotel	52%
Paid non/hotel	7%
Other	3%

Transportation	
Auto	59%
Air	30%
Other	11%

Length of Stay	
Average	4.1 days
1-3 Nights	71%
4-7 Nights	22%
8+ Nights	7%

Quarter of Travel	
Quarter 1	28%
Quarter 2	24%
Quarter 3	24%
Quarter 4	24%

Trip Distance	
Average Distance (miles)	660
Under 100 Miles	6%
101-300 Miles	31%
301-500 Miles	21%
501-700 Miles	10%
701-1,000 Miles	6%
Over 1,000 Miles	26%

Expenditures	
Average (per person per day)	\$106.26
Transportation	31.4%
Room	20.6%
Food	20.4%
Shopping	12.7%
Entertainment	10.4%
Other	4.6%

Reservation Type	
Accommodation	
No Reservation	33%
Reservation	67%
Computer/Internet	17%
Direct to Location	15%
Toll-Free Number	13%
Other	13%
Corporate Travel	9%
Travel Agent	3%

Reservation Type	
Transportation	
No Reservation	37%
Reservation	63%
Computer/Internet	23%
Other	15%
Toll-Free Number	12%
Corporate Travel	10%
Travel Agent	2%

Party Composition	
Avg. Party Size	2.0
One Adult	41%
MM/FF	5%
3+ Adults	6%
Couples	31%
Families	17%

Activities	
General Spending (Net)	45%
Dining	35%
Shopping	23%
Entertainment	21%
Outdoor Sports (Net)	13%
Adventure Sports	3%
Hunt/Fish	2%
Golf	5%
Boat/Sail	4%
Nature (Net)	26%
Hike/Bike	8%
Camping	5%
National/State Parks	13%
Beach/Waterfront	3%
Eco-Travel	7%
Sightseeing (Net)	34%
Sightseeing	31%
Group Tour	4%
Attractions (Net)	16%
Theme Park	1%
Sporting Event	7%
Night Life	6%
Gamble	3%
Shows	2%
Culture (Net)	17%
Historic Site	8%
Concert/Play/Dance	2%
Museum/Art Exhibit	5%
Festival/Craft Fair	4%

Satisfaction with Destination	
Average (10 pt. scale)	7.5
8-10 Excellent	61%
4-7 Fair/Good	33%
1-3 Poor	6%

Value of Destination	
Average (10 pt. scale)	7.3
8-10 Excellent	53%
4-7 Fair/Good	42%
1-3 Poor	5%

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



Total Domestic Overnight Non-Resident Visitor Profile

2003 Quick Facts: Visitor Profile	
Estimated Volume	19.7 Million
Average Length of Stay	4.6 days
Average Party Size	1.9
Spending Per Person Per Day	\$112.54
Total Direct Spending	\$10.28 Billion

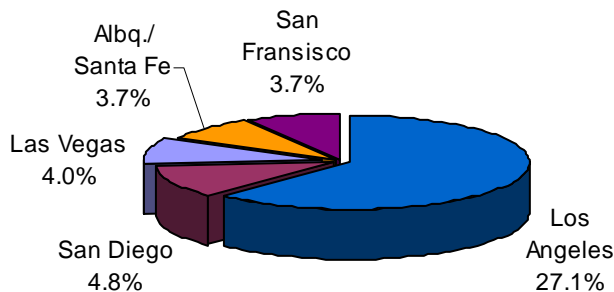
Regional visitation was strong in 2003, representing more than 40 percent of domestic overnight visitation, not including Arizona. Non-regional travelers visited Arizona from Illinois, New York, Minnesota, and Washington.

Spending per day by domestic overnight non-residents ,

experienced a slight decrease from \$115 in 2002 to \$112.50 in 2003.

In 2003, domestic overnight non-resident travel volume fell 3.3 percent, from 20.4 million in 2002 to 19.7 million in 2003. The average stay length went up slightly to 4.6 nights in 2003 from 4.5 nights in 2002. The average household income for non-resident travelers rose 1.3 percent from \$77,000 to \$78,000 in 2003

Top 5 Origin DMA's



Copperwynd Resort and Club, Scottsdale, AZ

Origin State	
California	41.9%
Nevada	4.6%
Illinois	4.4%
Texas	4.1%
New Mexico	4.0%

Origin DMA	
Los Angeles	27.1%
San Diego	4.8%
Las Vegas	4.0%
Alb.—Santa Fe	3.7%
San Francisco	3.7%

Demographics:

Household Income	
Average HH Income	\$78,000
<\$25,000	7%
\$25K-\$49,999	24%
\$50K-\$74,999	19%
\$75,000+	51%

Education	
No College	26%
Attended College	34%
College Grad.	24%
Post-Grad. Degree	16%

Life Stage	
18-34/No children	11%
18-34/Children	13%
35-54/No children	27%
35-54/Children/<\$50K	5%
35-54/Children/\$50K+	16%
55+/No children/<\$50K	8%
55+/No children/\$50K+	18%

Age	
Average (years)	46.0
18-34 years	24%
35-54 years	48%
55+ years	28%

Occupation	
Manager, Prof.	40%
Tech., Sales, Admin.	18%
Service	5%
Other	16%
Retired	11%
Not Employed	10%

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



Total Domestic Overnight Non-Resident Visitor Profile

Trip Behaviors:

Purpose of Stay	
Business	22%
Leisure	78%

Accommodations	
Non-Paid (Net)	38%
Hotel	52%
Paid non/hotel	7%
Other	3%

Transportation	
Auto	44%
Air	44%
Other	12%

Length of Stay	
Average	4.6 days
1-3 Nights	61%
4-7 Nights	29%
8+ Nights	10%

Quarter of Travel	
Quarter 1	29%
Quarter 2	24%
Quarter 3	23%
Quarter 4	24%

Trip Distance	
Average Distance (miles)	912
Under 100 Miles	-
101-300 Miles	9%
301-500 Miles	28%
501-700 Miles	15%
701-1,000 Miles	9%
Over 1,000 Miles	39%

Expenditures	
Average (per person per day)	\$112.54
Transportation	34.0%
Room	20.5%
Food	19.6%
Shopping	11.7%
Entertainment	9.6%
Other	4.6%

Reservation Type	
Accommodation	
No Reservation	30%
Reservation	70%
Direct to Location	16%
Computer/Internet	16%
Other	13%
Toll-Free Number	12%
Corporate Travel	5%
Travel Agent	3%

Reservation Type	
Transportation	
No Reservation	29%
Reservation	71%
Computer/Internet	31%
Toll-Free Number	14%
Corporate Travel	14%
Other	10%
Travel Agent	3%

Party Composition	
Avg. Party Size	1.9
One Adult	44%
MM/FF	6%
3+ Adults	5%
Couples	31%
Families	14%

Activities	
General Spending (Net)	49%
Dining	38%
Shopping	25%
Entertainment	24%
Outdoor Sports (Net)	13%
Adventure Sports	3%
Hunt/Fish	2%
Golf	5%
Boat/Sail	4%
Nature (Net)	27%
Hike/Bike	7%
Camping	5%
National/State Parks	15%
Beach/Waterfront	3%
Eco-Travel	7%
Sightseeing (Net)	36%
Sightseeing	34%
Group Tour	3%
Attractions (Net)	16%
Theme Park	2%
Sporting Event	6%
Night Life	6%
Gamble	3%
Shows	1%
Culture (Net)	17%
Historic Site	10%
Concert/Play/Dance	2%
Museum/Art Exhibit	5%
Festival/Craft Fair	4%

Satisfaction with Destination	
Average (10 pt. scale)	7.5
8-10 Excellent	60%
4-7 Fair/Good	35%
1-3 Poor	5%

Value of Destination	
Average (10 pt. scale)	7.2
8-10 Excellent	50%
4-7 Fair/Good	45%
1-3 Poor	5%

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



Total Domestic Overnight Resident Visitor Profile

2003 Quick Facts: Visitor Profile	
Estimated Volume	8.1 Million
Average Length of Stay	2.8 days
Average Party Size	2.1
Spending Per Person Per Day	\$81.11
Total Direct Spending	\$1.85 Billion

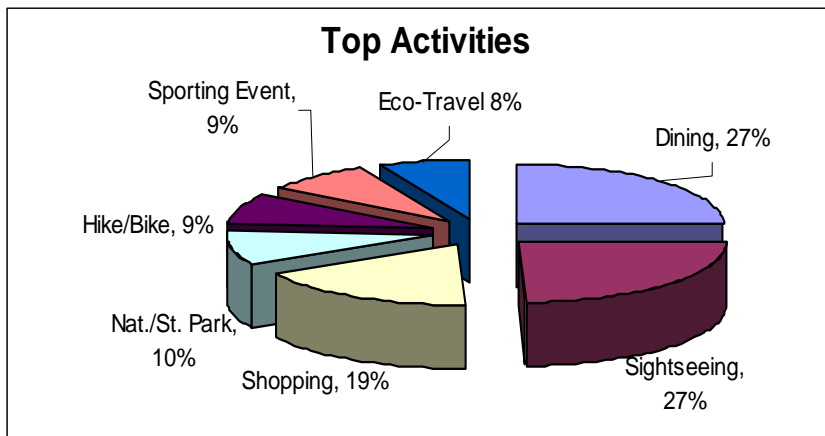
The 3.6 percent increase in total domestic overnight travel volume was partially the result of the increase in domestic overnight resident travel, up 25.3 percent from 6.5 million in 2002 to 8.1 million in 2003.

The average party size among resident travelers was down 16 percent to 2.1 persons in 2003 from 2.5 in 2002. Direct spending by domestic overnight resident travelers increased 33.1 percent, up to \$1.85 billion from \$1.39 billion. This

increase occurred as a result of increases in both visitor-days, up 22.0 percent, and spending per person per day, up 9.1 percent. Spending per day by overnight residents also went up 9.1 percent from \$74 in 2002 to \$81 in 2003.



Outside of Flagstaff, AZ



Origin DMA	
Phoenix	77.7%
Tucson (Sierra Vista)	21.8%

Demographics:

Household Income	
Average HH Income	\$61,000
<\$25,000	11%
\$25K-\$49,999	35%
\$50K-\$74,999	25%
\$75,000+	29%
Education	
No College	31%
Attended College	40%
College Degree	17%
Post-Grad. Degree	12%

Life Stage	
18-34/No children	14%
18-34/Children	29%
35-54/No children	16%
35-54/Children/<\$50K	9%
35-54/Children/\$50K+	11%
55+/No children/<\$50K	8%
55+/No children/\$50K+	12%

Age	
Average (years)	42.0
18-34 years	44%
35-54 years	36%
55+ years	20%
Occupation	
Manager, Prof.	29%
Tech., Sales, Admin.	23%
Service	6%
Other	11%
Retired	11%
Not Employed	19%

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



Total Domestic Overnight Resident Visitor Profile

Trip Behaviors:

Purpose of Stay	
Business	21%
Leisure	79%

Accommodations	
Non-Paid (Net)	36%
Hotel	52%
Paid non/hotel	8%
Other	4%

Transportation	
Auto	88%
Air	3%
Other	10%

Length of Stay	
Average	2.8 days
1-3 Nights	90%
4-7 Nights	9%
8+ Nights	2%

Quarter of Travel	
Quarter 1	26%
Quarter 2	23%
Quarter 3	28%
Quarter 4	23%

Trip Distance	
Average Distance (miles)	186
Under 100 Miles	18%
101-300 Miles	73%
301-500 Miles	9%

Expenditures	
Average (per person per day)	\$81.11
Food	23.8%
Room	21.0%
Transportation	19.6%
Shopping	17.3%
Entertainment	14.0%
Other	4.2%

Reservation Type	
Accommodation	
No Reservation	37%
Reservation	63%
Computer/Internet	18%
Toll-Free Number	14%
Direct to Location	13%
Other	12%
Corporate Travel	5%
Travel Agent	1%

Reservation Type	
Transportation	
No Reservation	52%
Reservation	48%
Other	25%
Toll-Free Number	10%
Computer/Internet	9%
Corporate Travel	3%
Travel Agent	-

Party Composition	
Avg. Party Size	2.8
One Adult	37%
MM/FF	3%
3+ Adults	6%
Couples	30%
Families	25%

Activities	
General Spending (Net)	37%
Dining	27%
Shopping	19%
Entertainment	1%
Outdoor Sports (Net)	12%
Adventure Sports	3%
Hunt/Fish	4%
Golf	3%
Boat/Sail	3%
Snow Ski	1%
Nature (Net)	24%
Hike/Bike	9%
Camping	6%
National/State Parks	10%
Beach/Waterfront	2%
Eco-Travel	8%
Sightseeing (Net)	31%
Sightseeing	27%
Group Tour	6%
Attractions (Net)	18%
Theme Park	1%
Sporting Event	9%
Night Life	6%
Gamble	3%
Shows	3%
Culture (Net)	17%
Historic Site	6%
Concert/Play/Dance	4%
Museum/Art Exhibit	4%
Festival/Craft Fair	4%

Satisfaction with Destination	
Average (10 pt. scale)	7.5
8-10 Excellent	63%
4-7 Fair/Good	30%
1-3 Poor	7%

Value of Destination	
Average (10 pt. scale)	7.5
8-10 Excellent	60%
4-7 Fair/Good	35%
1-3 Poor	5%

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



Total Domestic Overnight Business Visitor Profile

2003 Quick Facts: Visitor Profile	
Estimated Volume	6.2 Million
Average Length of Stay	4.0 days
Average Party Size	1.4
Spending Per Person Per Day	\$136.18
Total Direct Spending	\$3.35 Billion

Origin DMA	
Phoenix	26.2%
Los Angeles	17.7%
Tucson (Sierra Vista)	7.7%
Salt Lake City	3.5%
Sacramento	2.4%

Domestic overnight business person-trips in Arizona fell 11.3 percent, from 7.0 million in 2002 to 6.2 million in 2003.

Domestic overnight business travelers in Arizona spent the most per person per day, although this spending level declined from \$140 in 2002 to \$136 in 2003. The U.S. domestic overnight business travel segment stayed flat from 2002 to 2003.

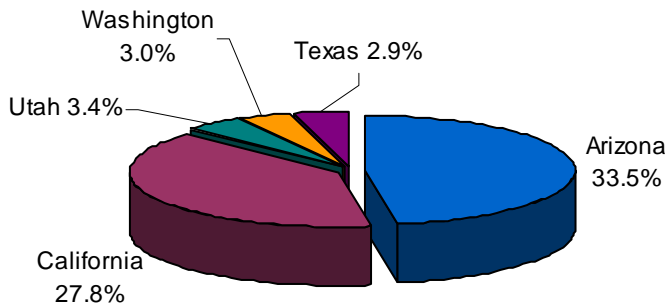
Both regional markets and longer haul markets were sources for domestic overnight

business travelers to Arizona in 2003 generating 6.1 million visitors. Arizonans led in business travel with 33.5 percent, others came from Utah — 3.4 percent, Washington - 3.0 percent, Texas - 2.9 percent, Virginia 2.5 percent, and Florida & Indiana - 2.1 percent.



Near the Superstition Mts., Central AZ

Top 5 Origin States



Origin State	
Arizona	33.5%
California	27.8%
Utah	3.4%
Washington	3.0%
Texas	2.9%

Demographics:

Household Income	
Average HH Income	\$83,000
<\$25,000	7%
\$25K-\$49,999	24%
\$50K-\$74,999	15%
\$75,000+	55%

Education	
No College	26%
Attended College	33%
College Degree	21%
Post-Grad. Degree	20%

Life Stage	
18-34/No children	10%
18-34/Children	15%
35-54/No children	25%
35-54/Children/<\$50K	9%
35-54/Children/\$50K+	19%
55+/No children/<\$50K	6%
55+/No children/\$50K+	15%

Age	
Average (years)	45
18-34 years	25%
35-54 years	53%
55+ years	22%

Occupation	
Manager, Prof.	47%
Tech., Sales, Admin.	11%
Service	5%
Other	23%
Retired	7%
Not Employed	7%

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



Total Domestic Overnight Business Visitor Profile

Trip Behaviors:

Accommodations	
Non-Paid (Net)	11%
Hotel	82%
Paid non/hotel	3%
Other	3%

Transportation	
Auto	39%
Air	43%
Other	18%

Length of Stay	
Average	4.0 days
1-3 Nights	72%
4-7 Nights	22%
8+ Nights	6%

Quarter of Travel	
Quarter 1	31%
Quarter 2	25%
Quarter 3	23%
Quarter 4	21%

Trip Distance	
Average Distance (miles)	678
Under 100 Miles	4%
101-300 Miles	32%
301-500 Miles	23%
501-700 Miles	9%
701-1,000 Miles	5%
Over 1,000 Miles	26%

Expenditures	
Average (per person per day)	\$136.18
Room	34.9%
Transportation	32.2%
Food	16.5%
Shopping	6.9%
Entertainment	4.9%
Other	4.7%

Reservation Type	
Accommodation	
No Reservation	16%
Reservation	84%
Corporate Travel	32%
Computer/Internet	15%
Other	14%
Direct to Location	9%
Toll-Free Number	9%

Reservation Type	
Transportation	
No Reservation	17%
Reservation	83%
Corporate Travel	42%
Other	19%
Computer/Internet	13%
Toll-Free Number	5%
Travel Agent	4%

Party Composition	
Avg. Party Size	1.4
One Adult	75%
MM/FF	4%
3+ Adults	5%
Couples	12%
Families	4%

Activities	
General Spending (Net)	43%
Dining	35%
Shopping	16%
Entertainment	15%
Outdoor Sports (Net)	7%
Adventure Sports	4%
Hunt/Fish	-
Golf	2%
Boat/Sail	-
Nature (Net)	15%
Hike/Bike	2%
Camping	1%
National/State Parks	6%
Beach/Waterfront	-
Eco-Travel	8%
Sightseeing (Net)	17%
Sightseeing	15%
Group Tour	4%
Attractions (Net)	12%
Sporting Event	3%
Night Life	5%
Gamble	2%
Shows	1%
Culture (Net)	7%
Historic Site	4%
Concert/Play/Dance	2%
Museum/Art Exhibit	1%
Festival/Craft Fair	2%

Satisfaction with Destination	
Average (10 pt. scale)	6.9
8-10 Excellent	46%
4-7 Fair/Good	44%
1-3 Poor	10%
Value of Destination	
Average (10 pt. scale)	7.0
8-10 Excellent	49%
4-7 Fair/Good	43%
1-3 Poor	8%

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



Total Domestic Overnight Leisure Visitor Profile

2003 Quick Facts: Visitor Profile	
Estimated Volume	21.7 Million
Average Length of Stay	4.1 days
Average Party Size	2.2
Spending Per Person Per Day	\$98.05
Total Direct Spending	\$8.79 Billion

In 2003 there was a strong increase of 8.8 percent in the domestic overnight leisure travel segment, from 19.9 million in 2002 to 21.7 million in 2003. Arizona outpaced the U.S. domestic overnight leisure travel segment, which increased by 7.0 percent.

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

Twenty six percent of Arizona's domestic overnight leisure visitors arrived by air in 2003. This was down 4 percent from 2002, which is relative to the strong increase of resident leisure travelers in 2003.

Origin State	
Arizona	36.2%
California	26.8%
Nevada	3.5%
Illinois	3.2%
New Mexico	2.8%

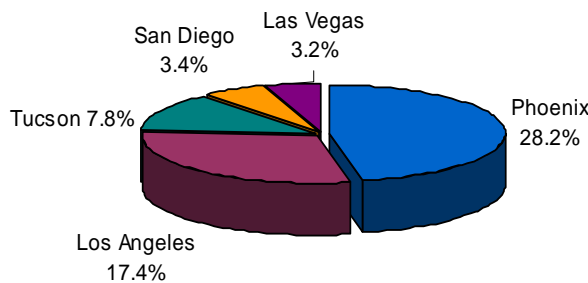
Domestic overnight leisure travelers spent an average of \$98 per person per day in Arizona in 2003, staying flat from 2002. This segment had a higher average travel party size, 2.2 persons, in comparison to Arizona's total domestic overnight visitor, 2.0 persons.

The most popular activities



Central Arizona

Top 5 Origin DMA's



Origin DMA	
Phoenix	28.2%
Los Angeles	17.4%
Tucson	7.8%
San Diego	3.4%
Las Vegas	3.2%

Demographics:

Household Income	
Average HH Income	\$69,000
<\$25,000	9%
\$25K-\$49,999	29%
\$50K-\$74,999	23%
\$75,000+	40%

Education	
No College	28%
Attended College	37%
College Degree	22%
Post-Grad. Degree	13%

Life Stage	
18-34/No children	13%
18-34/Children	20%
35-54/No children	23%
35-54/Children/<\$50K	6%
35-54/Children/\$50K+	13%
55+/No children/<\$50K	8%
55+/No children/\$50K+	17%

Age	
Average (years)	45
18-34 years	33%
35-54 years	41%
55+ years	26%

Occupation	
Manager, Prof.	33%
Tech., Sales, Admin.	22%
Service	6%
Other	12%
Retired	12%
Not Employed	15%

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



Total Domestic Overnight Leisure Visitor Profile

Trip Behaviors:

Accommodations	
Non-Paid (Net)	45%
Hotel	44%
Paid non/hotel	8%
Other	3%

Transportation	
Auto	64%
Air	26%
Other	10%

Length of Stay	
Average	4.1 days
1-3 Nights	71%
4-7 Nights	22%
8+ Nights	7%

Quarter of Travel	
Quarter 1	27%
Quarter 2	23%
Quarter 3	25%
Quarter 4	25%

Trip Distance	
Average Distance (miles)	655
Under 100 Miles	7%
101-300 Miles	31%
301-500 Miles	21%
501-700 Miles	10%
701-1,000 Miles	6%
Over 1,000 Miles	25%

Expenditures	
Average (per person per day)	\$98.05
Transportation	31.0%
Food	22.1%
Shopping	15.2%
Room	14.4%
Entertainment	4.9%
Other	4.5%

Reservation Type	
Accommodation	
No Reservation	38%
Reservation	62%
Computer/Internet	17%
Direct to Location	16%
Toll-Free Number	14%
Other	12%
Travel Agent	2%
Corporate Travel	1%

Reservation Type	
Transportation	
No Reservation	43%
Reservation	57%
Computer/Internet	26%
Toll-Free Number	14%
Other	14%
Travel Agent	2%
Corporate Travel	1%

Party Composition	
Avg. Party Size	2.2
One Adult	27%
MM/FF	6%
3+ Adults	6%
Couples	38%
Families	23%

Activities	
General Spending (Net)	45%
Dining	34%
Shopping	25%
Entertainment	23%
Outdoor Sports (Net)	14%
Adventure Sports	2%
Hunt/Fish	3%
Golf	5%
Boat/Sail	5%
Snow Ski	1%
Nature (Net)	29%
Hike/Bike	10%
Camping	6%
National/State Parks	15%
Beach/Waterfront	4%
Eco-Travel	7%
Sightseeing (Net)	39%
Sightseeing	36%
Group Tour	4%
Attractions (Net)	18%
Theme Park	2%
Sporting Event	8%
Night Life	6%
Gamble	3%
Shows	2%
Culture (Net)	19%
Historic Site	10%
Concert/Play/Dance	3%
Museum/Art Exhibit	6%

Satisfaction with Destination	
Average (10 pt. scale)	7.6
8-10 Excellent	65%
4-7 Fair/Good	30%
1-3 Poor	5%

Value of Destination	
Average (10 pt. scale)	7.4
8-10 Excellent	55%
4-7 Fair/Good	41%
1-3 Poor	4%

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



Total Domestic Overnight Resident Leisure Visitor Profile

2003 Quick Facts: Visitor Profile	
Estimated Volume	6.1 Million
Average Length of Stay	2.9 days
Average Party Size	2.4
Spending Per Person Per Day	\$84.62
Total Direct Spending	\$1.49 Billion

Arizona's domestic overnight resident leisure travel segment is mostly comprised of couples and families. In fact, families represent 33 percent and couples represent 36 percent of resident leisure travel parties in 2003.

Domestic overnight resident leisure visitors' length of stay

Origin DMA	
Phoenix	77.9%
Tucson (Sierra Vista)	21.6%

declined slightly from 2.9 days in 2002 to 2.8 days in 2003.

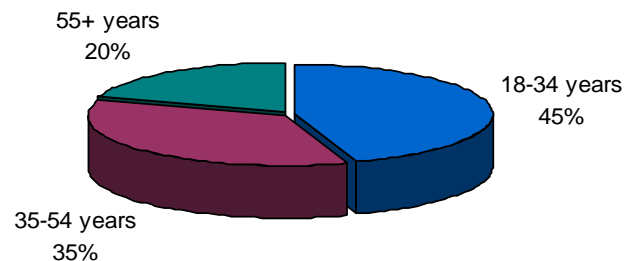
In 2003, 6 percent more resident leisure travelers (44 percent) stayed in a paid motel/hotel in comparison to 2002 (38 percent). An additional 43 percent stayed in non paid accommodations.

The average age of the resident leisure visitor is 41 in comparison to 45 years old for the average age of the domestic visitor to Arizona.



Northern Arizona

Age of Visitor



Demographics:

Household Income	
Average HH Income	\$57,000
<\$25,000	10%
\$25K-\$49,999	36%
\$50K-\$74,999	29%
\$75,000+	25%

Education	
No College	34%
Attended College	39%
College Degree	18%
Post-Grad. Degree	9%

Life Stage	
18-34/No children	14%
18-34/Children	31%
35-54/No children	15%
35-54/Children/<\$50K	9%
35-54/Children/\$50K+	10%
55+/No children/<\$50K	7%
55+/No children/\$50K+	12%

Age	
Average (years)	41
18-34 years	45%
35-54 years	35%
55+ years	20%

Occupation	
Manager, Prof.	25%
Tech., Sales, Admin.	27%
Service	8%
Other	7%
Retired	11%
Not Employed	22%

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



Total Domestic Overnight Resident Leisure Visitor Profile

Trip Behaviors:

Accommodations	
Non-Paid (Net)	43%
Hotel	44%
Paid non/hotel	8%
Other	5%

Transportation	
Auto	90%
Air	3%
Other	7%

Length of Stay	
Average	2.9 days
1-3 Nights	88%
4-7 Nights	9%
8+ Nights	2%

Quarter of Travel	
Quarter 1	26%
Quarter 2	22%
Quarter 3	28%
Quarter 4	25%

Trip Distance	
Average Distance (miles)	180
Under 100 Miles	20%
101-300 Miles	74%
301-500 Miles	6%
501-700 Miles	-
701-1,000 Miles	-
Over 1,000 Miles	-

Expenditures	
Average (per person per day)	\$84.62
Food	24.5%
Shopping	19.4%
Transportation	19.2%
Room	16.2%
Entertainment	16.1%
Other	4.7%

Reservation Type	
Accommodation	
No Reservation	40%
Reservation	60%
Computer/Internet	17%
Direct to Location	14%
Toll-Free Number	14%
Other	11%
Corporate Travel	1%

Reservation Type	
Transportation	
No Reservation	56.0%
Reservation	44.0%
Other	20%
Toll-Free Number	11%
Computer/Internet	11%
Corporate Travel	2%
Travel Agent	-

Party Composition	
Avg. Party Size	2.4
One Adult	23%
MM/FF	3%
3+ Adults	6%
Couples	36%
Families	33%

Value of Destination	
Average (10 pt. scale)	7.6
8-10 Excellent	59%
4-7 Fair/Good	35%
1-3 Poor	5%

Activities	
General Spending (Net)	36%
Dining	26%
Shopping	20%
Entertainment	17%
Outdoor Sports (Net)	12%
Adventure Sports	2%
Boat/Sail	4%
Hunt/Fish	5%
Golf	3%
Snow Ski	1%
Nature (Net)	27%
Hike/Bike	11%
Camping	7%
National/State Parks	11%
Beach/Waterfront	3%
Eco-Travel	9%
Sightseeing (Net)	34%
Sightseeing	29%
Group Tour	6%
Attractions (Net)	21%
Theme Park	1%
Sporting Event	11%
Night Life	7%
Gamble	3%
Shows	3%
Culture (Net)	19%
Historic Site	6%
Concert/Play/Dance	5%
Museum/Art Exhibit	5%
Festival/Craft Fair	5%

Satisfaction with Destination	
Average (10 pt. scale)	7.8
8-10 Excellent	68%
4-7 Fair/Good	28%
1-3 Poor	4%

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



Total Domestic Overnight Non-Resident Leisure Visitor Profile

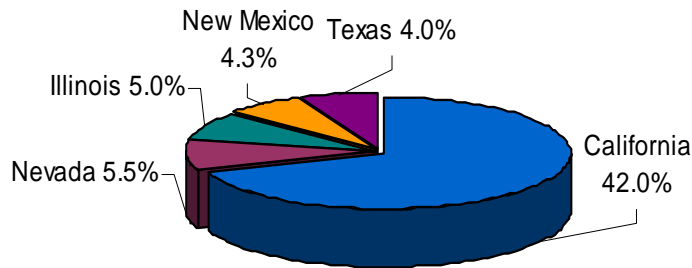
2003 Quick Facts: Visitor Profile	
Estimated Volume	15.6 Million
Average Length of Stay	4.6 days
Average Party Size	2.1
Spending Per Person Per Day	\$101.33
Total Direct Spending	\$7.29 Billion

The majority of non-resident, domestic leisure travelers to Arizona in 2003 originated in regional states and cities; 42 percent of visitors came from California. Cities in neighboring states contributed more than 50 percent of non-resident leisure visitors.

In 2003, there was a slight increase in average length of stay for Arizona's non-resident leisure travelers from 4.5 days in 2002 to 4.6 days.

In 2003, 35 percent of Arizona's non-resident leisure travelers booked their transportation online, an increase of 9 percent from 2002. There was also a 5 percent increase of booking online for accommodations from 12 percent in 2002 to 17 percent in 2003.

Top 5 Origin States



Biking in Prescott, AZ

Origin State	
California	42.0%
Nevada	5.5%
Illinois	5.0%
New Mexico	4.3%
Texas	4.0%

Origin DMA	
Los Angeles	27.2%
San Diego	5.4%
Las Vegas	5.0%
Albq.—Santa Fe	4.2%
San Francisco	3.9%

Demographics:

Household Income	
Average HH Income	\$75,000
<\$25,000	8%
\$25K-\$49,999	25%
\$50K-\$74,999	19%
\$75,000+	48%

Education	
No College	25%
Attended College	36%
College Degree	24%
Post-Grad. Degree	15%

Life Stage	
18-34/No children	12%
18-34/Children	14%
35-54/No children	26%
35-54/Children/<\$50K	4%
35-54/Children/\$50K+	15%
55+/No children/<\$50K	9%
55+/No children/\$50K+	19%

Age	
Average (years)	47
18-34 years	26%
35-54 years	45%
55+ years	29%

Occupation	
Manager, Prof.	37%
Tech., Sales, Admin.	20%
Service	4%
Other	15%
Retired	13%
Not Employed	11%

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



Total Domestic Overnight Non-Resident Leisure Visitor Profile

Trip Behaviors:

Accommodations	
Non-Paid (Net)	46%
Hotel	44%
Paid non/hotel	8%
Other	2%

Transportation	
Auto	50%
Air	38%
Other	11%

Length of Stay	
Average	4.6 days
1-3 Nights	61%
4-7 Nights	29%
8+ Nights	10%

Quarter of Travel	
Quarter 1	28%
Quarter 2	24%
Quarter 3	23%
Quarter 4	25%

Trip Distance	
Average Distance (miles)	910
Under 100 Miles	-
101-300 Miles	7%
301-500 Miles	29%
501-700 Miles	16%
701-1,000 Miles	9%
Over 1,000 Miles	39%

Expenditures	
Average (per person per day)	\$101.33
Transportation	34.3%
Food	21.4%
Shopping	14.1%
Room	13.9%
Entertainment	11.9%
Other	4.4%

Reservation Type	
Accommodation	
No Reservation	36%
Reservation	64%
Computer/Internet	17%
Toll-Free Number	13%
Other	13%
Travel Agent	2%
Direct to Location	1%
Corporate Travel	-

Reservation Type	
Transportation	
No Reservation	35%
Reservation	65%
Computer/Internet	35%
Toll-Free Number	16%
Other	11%
Travel Agent	2%
Corporate Travel	-

Party Composition	
Avg. Party Size	2.1
One Adult	29%
MM/FF	7%
3+ Adults	6%
Couples	40%
Families	18%

Activities	
General Spending (Net)	50%
Dining	39%
Shopping	27%
Entertainment	26%
Outdoor Sports (Net)	15%
Adventure Sports	3%
Hunt/Fish	2%
Golf	6%
Boat/Sail	5%
Nature (Net)	30%
Hike/Bike	9%
Camping	5%
National/State Parks	18%
Beach/Waterfront	4%
Eco-Travel	6%
Sightseeing (Net)	41%
Sightseeing	40%
Group Tour	3%
Attractions (Net)	16%
Theme Park	2%
Sporting Event	6%
Night Life	6%
Gamble	3%
Shows	1%
Culture (Net)	19%
Historic Site	11%
Concert/Play/Dance	2%
Museum/Art Exhibit	6%
Festival/Craft Fair	5%

Satisfaction with Destination	
Average (10 pt. scale)	7.6
8-10 Excellent	63%
4-7 Fair/Good	31%
1-3 Poor	6%

Value of Destination	
Average (10 pt. scale)	7.3
8-10 Excellent	52%
4-7 Fair/Good	45%
1-3 Poor	3%

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.

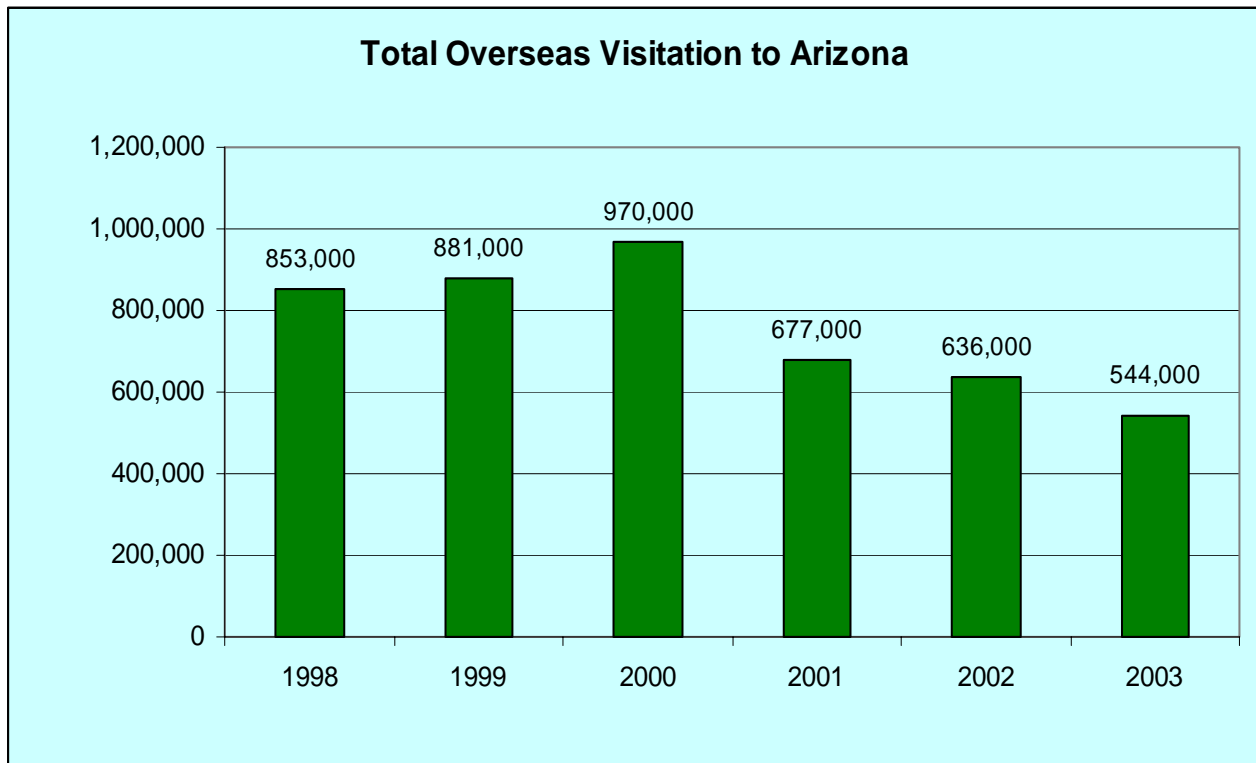
The questionnaire is designed to collect information on a traveler's complete trip itinerary, including information on every major destination visited, the length of stay and the type of accommodations utilized.

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 five markets including, Japan, Germany, UK, Mexico, and France. 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:

Visitation Volume	
Total Int'l Visitation (000s)	544

Age	
Male Average	44.2 years
Female Average	40.6 years

Origin Markets	
U.K.	18.4%
Germany	16.4%
Mexico	11.0%
Japan	9.1%
France	8.5%
Netherlands	5.6%
Italy	3.9%
Australia	3.9%
South America	2.5%
South Korea	2.3%

Household Income	
< \$40,000	28.6%
\$40,000 - \$79,999	31.2%
\$80,000 - \$119,999	20.6%
\$120,000+	19.6%

Gender	
Men	67.3%
Women	32.7%

Frequent Travelers	
Repeat Visitor to the U.S.	70.6%
U.S. Trips last 12 Months	2
U.S. Trips last 5 Years	6.3
1 Trip	33.7%
2 - 5 Trips	42.7%
5+ Trips	23.6%

Party Composition	
Avg. Travel Party (mean)	1.6
Traveling Alone	34.5%
Spouse	35.7%
Family/Relatives	28.8%
Friends	11.8%
Business Associates	4.5%
Group Tour	1.9%
Adults Only	91.4%
Adults and Children	8.6%

Port of Entry	
Los Angeles	26.5%
Other	44.6%
San Francisco	11.4%
Chicago	8.6%
Atlanta	4.6%
New York	4.3%

Trip Behaviors:

Expenditures	
Avg. Spending Per Person Per Day	\$84

Advance Trip Planning	
Advance Trip Decision	91.8 days
Advance Air Reservations	56.4 days
Use of Pre-Booked Lodging	59%

Accommodations	
Hotel/Motel	76.5%
Private Home	18.8%
Other	8.4%

AZ Destinations Visited	
Phoenix	42.7%
Grand Canyon NP	38.4%
Tucson	11.6%
Glen Canyon NP	2.5%

Use of Packages	
YES	18.6%
Guided Tour	11.7%
Air/Lodging	10.0%
Air/Rental Car	5.8%
Air/Lodging/Tour	5.2%
Air/Lodging/Rental Car	4.8%
Air/Lodging/Bus	3.1%
Air/Lodging/Bus/Tour	2.9%
Advance Package Booking	81.6 days
# of Nights Pre-paid as Part of a Package	11.3 nights

Length of Stay	
# of Nights in Arizona (mean)	5.9
# of Nights in U.S. (mean)	21.7

Information Sources	
Travel Agency	55.0%
Personal Computer	32.7%
Friends/Relatives	16.1%
Airlines Directly	14.3%
Travel Guides	13.6%
Tour Company	10.1%
State/City Travel Office	9.8%
Newspapers/Magazines	6.3%
Corporate Travel Dept.	6.1%
Other	5.5%

Transportation in U.S.	
Rented Auto	52.0%
Airlines in U.S.	36.5%
Company or Private Auto	32.1%
Taxi/Cab/Limousine	27.3%
City Subway/Tram/Bus	17.4%

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:

Purpose of Trip	
Leisure & VFR	76.3%
Leisure/Rec./Holidays	53.4%
Visit Friends/Relatives	22.1%
Other	0.7%
Business and Convention	23.7%
Business/Professional	16.8%
Convention/Conference	4.4%
Study/Teaching	2.5%

Other Destinations Visited	
# of States Visited	3
# of Destinations Visited	4.4
California	59.4%
Los Angeles	36.8%
San Francisco	29.6%
San Diego	10.5%
Yosemite N.P.	10.5%
Nevada	51.6%
Las Vegas	50.7%
Utah	22.7%
Bryce Canyon N.P.	9.6%
New York	8.9%
Texas	7.2%
Colorado	5.5%

Leisure Activities	
Shopping	85.5%
Dining in Restaurants	84.2%
Visit National Parks	64.5%
Sightseeing in Cities	57.8%
Visit Small Towns	54.2%
Touring Countryside	52.3%
Visit Historical Places	50.8%
Casinos/Gambling	42.2%
Cultural Heritage Sites	40.5%
Amusement/Theme Parks	39.8%
Visit Native Am. Comm.	26.3%
Guided Tours	24.6%
Water Sports/Sunbathing	24.6%
Art Gallery/Museum	21.7%
Camping/Hiking	19.4%
Concert/Play/Musical	15.0%
Ethnic Heritage Sites	12.3%
Nightclubs/Dancing	11.0%
Environ./Eco Excursions	9.0%
Cruises	8.3%
Golfing/Tennis	7.4%
Attend Sports Event	6.6%
Ranch Vacations	3.7%
Hunting/Fishing	3.6%
Snow Skiing	2.2%



Jeep Tour, Sedona, AZ

In 2003, overseas visitation to Arizona decreased 15.3 percent, dropping from 636,000 in 2002 to 544,000. The average advance trip decision did get shorter by 5.2 days from 2002 (97 days) to 2003 (91.8 days). Advanced package booking followed the same trend and dropped 7.1 days from 88.7 days in 2002 to 81.6 days in 2003.

The use of personal computer for information sources increased 7 percent from 25.7 percent in 2002 to 32.7 percent in 2003. This follows the travel industry trend of the increasing use of the internet for travel information and bookings. But, the number one source of information for overseas travelers still remains travel agencies with 55 percent.

Another notable increase in 2003 is the spending per person per day, which rose \$10.00 to \$84.00 per day.

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

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

Total Overseas Air Visitors to Phoenix Profile**

Demographics:

Age	
Male Average	43.5 years
Female Average	40.7 years

Household Income	
< \$40,000	30.6%
\$40,000 - \$79,999	28.1%
\$80,000 - \$119,999	14.8%
\$120,000+	26.4%

Party Composition	
Avg. Travel Party (mean)	1.5
Traveling Alone	43.2%
Family/Relatives	22.0%
Spouse	27.9%
Business Associates	9.5%
Friends	6.7%
Group Tour	0.8%
Adults Only	92.2%
Adults and Children	7.8%

Origin Markets	
Germany	19.9%
Mexico	18.4%
U.K.	12.4%
Japan	9.8%
France	6.0%
Oceania	5.6%
Italy	4.6%
South America	3.1%
Africa	2.4%
Netherlands	1.6%

Gender	
Men	74.1%
Women	25.9%

Frequent Travelers	
Repeat Visitor to the	82.2%
U.S. Trips last 12 Months	2.8
U.S. Trips last 5 Years	10.2
1 Trip	20.2%
2 - 5 Trips	42.2%
5+ Trips	37.5%

Port of Entry	
Other	50.4%
Los Angeles	20.6%
Chicago	10.1%
San Francisco	7.2%
Atlanta	3.4%
New York	2.7%

Trip Behaviors:

Advance Trip Planning	
Advance Trip Decision	79.5 days
Advance Air Reservations	46.5 days
Use of Pre-Booked Lodging	62.7%

Use of Packages	
YES	9.0%
Air/Lodging	6.3%
Guided Tour	6.1%
Air/Lodging/Tour	3.7%
Air/Lodging/Bus	2.1%
Air/Lodging/Bus/Tour	2.1%
Air/Rental Car	1.9%
Air/Lodging/Rental Car	1.7%
Advance Package Booking	101.4 days
# of Nights Pre-paid as Part of a Package	11.6 nights

Information Sources	
Travel Agency	55.6%
Airlines Directly	20.5%
Personal Computer	31.9%
Friends/Relatives	11.4%
Travel Guides	10.0%
Corporate Travel Dept.	8.9%
Other	5.8%
State/City Travel Office	9.3%
Tour Company	3.5%
Newspapers/Magazines	3.2%

Accommodations	
Hotel/Motel	67.1%
Private Home	30.2%
Other	3.1%

Expenditures	
Avg. Spending Per Person Per Day	\$113

AZ Destinations Visited	
Tucson	8.4%
Grand Canyon NP	16.2%
Glen Canyon NP	1.3%

Length of Stay	
# of Nights in Arizona (mean)	6.9
# of Nights in U.S. (mean)	17.5

Transportation in U.S.	
Rented Auto	43.4%
Airlines in U.S.	33.9%
Taxi/Cab/Limousine	32.0%
Company or Private Auto	15.4%
City Subway/Tram/Bus	15.4%

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

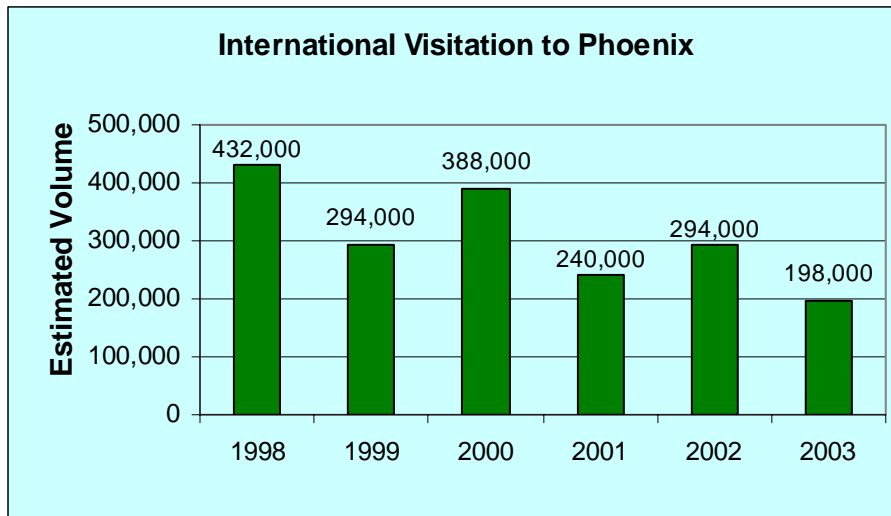
Purpose/Activities:

Visitation Volume	
Total Int'l Visitation (000s)	198

Purpose of Trip	
Leisure & VFR	60.2%
Leisure/Rec./Holidays	36.9%
Visit Friends/Relatives	21.2%
Other	2.1%
Business and Convention	39.9%
Business/Professional	30.0%
Convention/Conference	8.1%
Study/Teaching	1.8%

Other Destinations Visited	
# of States Visited	2.4
# of Destinations Visited	3.4
California	44.2%
Los Angeles	26.2%
San Francisco	22.6%
San Diego	11.2%
Yosemite N.P.	2.4%
Nevada	29.8%
Las Vegas	29.4%
Utah	10.0%
Bryce Canyon N.P.	5.1%
Texas	9.1%
Florida	6.0%
New York	5.8%

Leisure Activities	
Dining in Restaurants	85.4%
Shopping	83.9%
Visit National Parks	44.1%
Visit Small Towns	43.0%
Touring Countryside	39.9%
Sightseeing in Cities	38.3%
Visit Historical Places	37.0%
Cultural Heritage Sites	27.0%
Amusement/Theme Parks	25.8%
Casinos/Gambling	25.2%
Visit Native Am. Comm.	17.6%
Water Sports/Sunbathing	17.0%
Art Gallery/Museum	15.1%
Guided Tours	14.5%
Camping/Hiking	11.6%
Concert/Play/Musical	9.2%
Ethnic Heritage Sites	9.0%
Nightclubs/Dancing	8.5%
Golfing/Tennis	8.0%
Attend Sports Event	5.8%
Cruises	5.6%
Environ./Eco Excursions	5.1%
Snow Skiing	3.5%
Ranch Vacations	2.5%
Hunting/Fishing	2.5%



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 to Tucson Profile**

Demographics:

Visitation Volume		Household Income		Party Composition	
Total Int'l Visitation (000s)	64	< \$40,000	32.9%	Avg. Travel Party (mean)	1.3
Age		\$40,000 - \$79,999	36.2%	Traveling Alone	56.4%
Male Average	45.7 years	\$80,000 - \$119,999	20.8%	Spouse	25.3%
Female Average	43.0 years	\$120,000+	10.1%	Family/Relatives	18.2%
Origin Markets		Gender		Friends	5.2%
Mexico	17.5%	Men	67.3%	Business Associates	7.5%
Germany	12.0%	Women	32.7%	Group Tour	-
U.K.	10.3%	Frequent Travelers		Adults Only	94.2%
Japan	9.2%	Repeat Visitor to the U.S.	85.4%	Adults and Children	5.8%
Scandinavia	7.9%	U.S. Trips last 12 Months	2.5	Port of Entry	
France	6.3%	U.S. Trips last 5 Years	9.4	Other	44.1%
Oceania	5.9%	1 Trip	19.9%	Los Angeles	21.6%
South America	5.5%	2 - 5 Trips	38.0%	Dallas/Ft. Worth	12.3%
Netherlands	4.2%	5+ Trips	42.2%	Atlanta	6.8%
Italy	1.5%			San Francisco	6.1%
				Chicago	5.2%
				Washington DC	4.2%

Trip Behaviors:

Advance Trip Planning		Use of Packages		Information Sources	
Advance Trip Decision	75.4 days	YES	0.6%	Travel Agency	53.2%
Advance Air Reservations	29.5 days	Air/Rental Car	-	Personal Computer	32.4%
Use of Pre-Booked Lodging	59.5%	Air/Lodging	0.6%	Friends/Relatives	20.8%
Accommodations		Air/Lodging/Rental Car	-	Airlines Directly	19.3%
Hotel/Motel	69.0%	Guided Tour	-	Corporate Travel Dept.	8.8%
Private Home	30.0%	Air/Lodging/Tour	-	State/City Travel Office	7.4%
Other	2.8%	Air/Lodging/Bus	-	Travel Guides	5.7%
Expenditures		Air/Lodging/Bus/Tour	-	Other	4.1%
Avg. Spending Per Person Per Day	\$99	Advance Package Booking	120 days	Newspapers/Magazines	2.5%
AZ Destinations Visited		# of Nights Pre-paid as Part of a Package	1 nights	Tour Company	2.1%
Phoenix	30.5%	Length of Stay		Transportation in U.S.	
Grand Canyon NP	9.3%	# of Nights in Arizona (mean)	7.8	Rented Auto	60.3%
Glen Canyon NP	2.0%	# of Nights in U.S. (mean)	18.7	Airlines in U.S.	42.1%
				Company or Private Auto	30.6%
				Taxi/Cab/Limousine	21.7%
				City Subway/Tram/Bus	15.8%

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

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

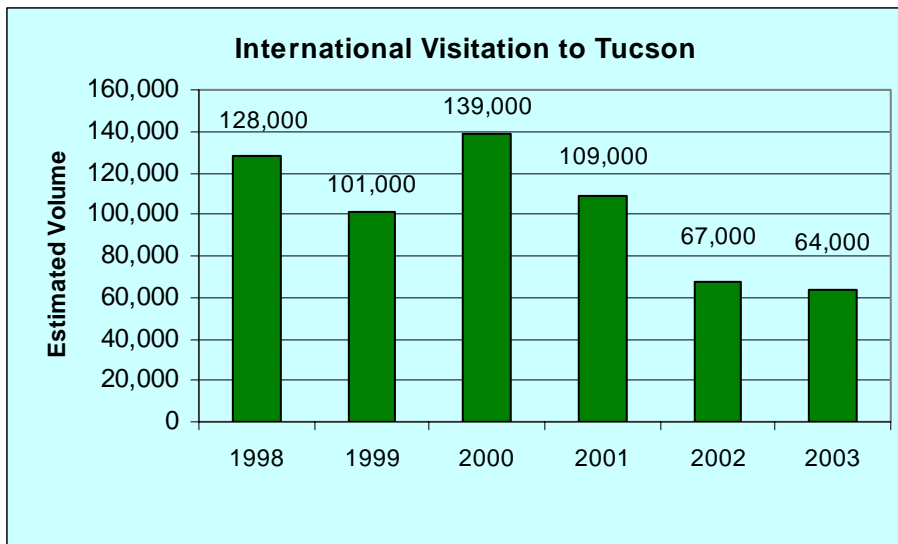
Total Overseas Air Visitors to Tucson Profile**

Purpose/Activities:

Purpose of Trip	
Leisure & VFR	56.3%
Leisure/Rec./Holidays	23.3%
Visit Friends/Relatives	32.9%
Other	0.1%
Business and Convention	43.7%
Business/Professional	29.2%
Convention/Conference	12.5%
Study/Teaching	2.0%

Other Destinations Visited	
# of States Visited	2.2
# of Destinations Visited	3.6
California	39.0%
Los Angeles	25.1%
San Francisco	10.7%
San Diego	12.2%
Nevada	10.4%
Las Vegas	10.4%
Colorado	9.3%
New York	8.4%
Texas	6.3%
New Jersey	6.3%
Florida	5.7%

Leisure Activities	
Dining in Restaurants	88.7%
Shopping	85.4%
Visit Small Towns	39.6%
Touring Countryside	38.1%
Visit Historical Places	36.7%
Visit National Parks	36.2%
Cultural Heritage Sites	34.1%
Sightseeing in Cities	32.5%
Casinos/Gambling	23.1%
Amusement/Theme Parks	20.4%
Art Gallery/Museum	18.4%
Visit Native Am. Comm.	13.9%
Water Sports/Sunbathing	11.6%
Camping/Hiking	10.1%
Golfing/Tennis	10.1%
Concert/Play/Musical	9.6%
Nightclubs/Dancing	5.0%
Attend Sports Event	4.4%
Cruises	4.0%
Environ./Eco Excursions	3.2%
Guided Tours	2.3%
Hunting/Fishing	2.3%
Ranch Vacations	1.8%
Snow Skiing	1.5%
Ethnic Heritage Sites	1.2%



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 to Grand Canyon Profile**

Demographics:

Visitation Volume	
Total Int'l Visitation (000s)	200

Age	
Male Average	44.7 years
Female Average	39.5 years

Origin Markets	
U.K.	24.4%
Germany	16.3%
Japan	10.8%
Netherlands	8.5%
Italy	6.9%
France	6.3%
South Korea	6.1%
Oceania	3.6%
Scandinavia	1.8%
Central America	0.9%

Household Income	
< \$40,000	22.7%
\$40,000 - \$79,999	34.9%
\$80,000 - \$119,999	24.0%
\$120,000+	18.4%

Gender	
Men	60.6%
Women	39.4%

Frequent Travelers	
Repeat Visitor to the U.S.	54.6%
U.S. Trips last 12 Months	1.2
U.S. Trips last 5 Years	2.5
1 Trip	49.4%
2 - 5 Trips	43.9%
5+ Trips	6.7%

Party Composition	
Avg. Travel Party (mean)	1.9
Spouse	44.2%
Family/Relatives	40.0%
Traveling Alone	19.5%
Friends	15.0%
Group Tour	2.8%
Business Associates	0.7%
Adults Only	86.9%
Adults and Children	13.1%

Port of Entry	
Other	28.8%
Los Angeles	26.4%
San Francisco	16.0%
Chicago	10.1%
Atlanta	6.4%
New York	6.3%

Trip Behaviors:

Advance Trip Planning	
Advance Trip Decision	111.4 days
Advance Air Reservations	72 days
Use of Pre-Booked Lodging	61.3%

Accommodations	
Hotel/Motel	82.2%
Private Home	1.3%
Other	16.8%

Expenditures	
Avg. Spending Per Person Per Day	\$75

AZ Destinations Visited	
Phoenix	16.4%
Tucson	3.1%
Glen Canyon NP	2.8%

Use of Packages	
YES	25.8%
Guided Tour	18.0%
Air/Lodging	13.7%
Air/Lodging/Tour	8.9%
Air/Rental Car	7.8%
Air/Lodging/Bus	5.5%
Air/Lodging/Rental Car	5.5%
Air/Lodging/Bus/Tour	5.1%
Advance Package Booking	68.8 days
# of Nights Pre-paid as Part of a Package	9.5 nights

Length of Stay	
# of Nights in Arizona (mean)	2.5
# of Nights in U.S. (mean)	25.3

Information Sources	
Travel Agency	53.1%
Personal Computer	38.8%
Travel Guides	23.2%
Friends/Relatives	19.6%
Tour Company	14.3%
Airlines Directly	12.6%
State/City Travel Office	12.6%
Newspapers/Magazines	10.3%
Other	7.3%
Corporate Travel Dept.	1.1%

Transportation in U.S.	
Rented Auto	61.4%
Airlines in U.S.	32.9%
Company or Private Auto	28.9%
Taxi/Cab/Limousine	22.2%
City Subway/Tram/Bus	23.3%

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

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



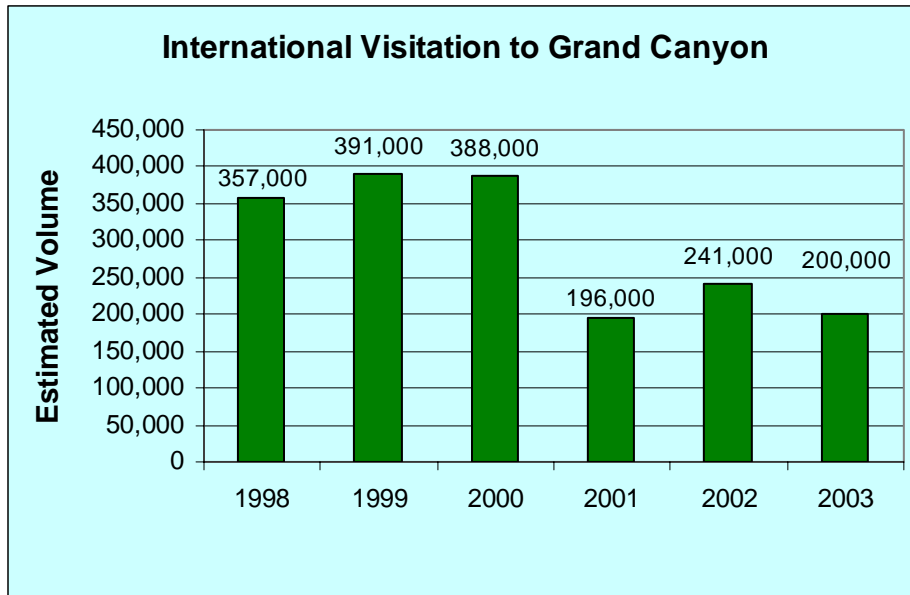
Total Overseas Air Visitors to Grand Canyon Profile**

Purpose/Activities:

Purpose of Trip	
Leisure & VFR	93.9%
Leisure/Rec./Holidays	75.4%
Visit Friends/Relatives	18.3%
Other	0.2%
Business and Convention	5.9%
Business/Professional	2.2%
Convention/Conference	0.3%
Study/Teaching	3.4%

Other Destinations Visited	
# of States Visited	3.6
# of Destinations Visited	5.6
California	75.5%
Los Angeles	44.3%
San Francisco	44.6%
San Diego	11.5%
Yosemite N.P.	26.3%
Nevada	81.1%
Las Vegas	80.9%
Utah	36.4%
Bryce Canyon N.P.	19.9%
New York	11.4%
Texas	7.8%
Colorado	7.2%

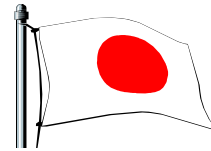
Leisure Activities	
Shopping	87.8%
Visit National Parks	87.5%
Dining in Restaurants	80.4%
Sightseeing in Cities	76.6%
Touring Countryside	67.7%
Visit Small Towns	62.8%
Visit Historical Places	56.1%
Casinos/Gambling	54.8%
Cultural Heritage Sites	53.6%
Amusement/Theme Parks	49.2%
Guided Tours	33.8%
Visit Native Am. Comm.	32.5%
Water Sports/Sunbathing	32.2%
Camping/Hiking	30.5%
Art Gallery/Museum	30.0%
Concert/Play/Musical	20.4%
Ethnic Heritage Sites	19.0%
Environ./Eco Excursions	15.1%
Cruises	14.8%
Nightclubs/Dancing	14.2%
Ranch Vacations	6.7%
Attend Sports Event	4.8%
Golfing/Tennis	4.3%
Hunting/Fishing	4.2%
Snow Skiing	1.4%



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:

Visitation Volume	
Total Visitation from Japan (000s)	44

Age	
Male Average	44.7 years
Female Average	40.4 years

Port of Entry	
Los Angeles	50.30%
San Francisco	21.90%
Other	10.10%
Seattle	6.80%
New York	4.00%
Detroit	3.60%
Honolulu	3.20%

Household Income	
< \$40,000	17.1%
\$40,000 - \$79,999	45.2%
\$80,000 - \$119,999	22.6%
\$120,000+	15.1%

Gender	
Men	65.5%
Women	34.5%

Frequent Travelers	
Repeat Visitor to the U.S.	69.5%
U.S. Trips last 12 Months	1.9
U.S. Trips last 5 Years	5.4
1 Trip	35.4%
2 - 5 Trips	40.6%
5+ Trips	23.9%

Party Composition	
Avg. Travel Party (mean)	1.8
Spouse	36.0%
Traveling Alone	28.6%
Family/Relatives	23.7%
Business Associates	11.9%
Friends	10.2%
Group Tour	6.0%
Adults Only	90.8%
Adults and Children	9.2%

Trip Behaviors:

Advance Trip Planning	
Advance Trip Decision	44.6 days
Advance Air Reservations	26.8 days
Use of Pre-Booked Lodging	77.5%

Accommodations	
Hotel/Motel	91.1%
Private Home	8.6%
Other	3.9%

Expenditures	
Avg. Spending Per Person Per Day	\$123

AZ Destinations Visited	
Grand Canyon NP	45.9%
Phoenix	44.1%
Tucson	11.3%
Glen Canyon NP	1.9%

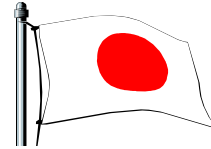
Use of Packages	
YES	26.9%
Air/Lodging	25.0%
Guided Tour	22.2%
Air/Lodging/Tour	20.3%
Air/Lodging/Bus	13.5%
Air/Lodging/Bus/Tour	13.5%
Air/Rental Car	0.5%
Air/Lodging/Rental Car	0.5%
Advance Package Booking	49 days
# of Nights Pre-paid as Part of a Package	5.5 nights

Length of Stay	
# of Nights in Arizona (mean)	4.5
# of Nights in U.S. (mean)	14.5

Information Sources	
Travel Agency	46.2%
Personal Computer	39.8%
Tour Company	19.6%
Newspapers/Magazines	16.5%
Travel Guides	15.8%
Airlines Directly	15.2%
Friends/Relatives	13.3%
Corporate Travel Dept.	11.2%
Other	9.8%
State/City Travel Office	0.8%

Transportation in U.S.	
Airlines in U.S.	58.7%
Rented Auto	42.0%
Taxi/Cab/Limousine	41.5%
Company or Private Auto	37.1%
City Subway/Tram/Bus	25.2%

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



Total Overseas Air Visitors From Japan Profile

Purpose/Activities:

Visitation Volume	
Total Visitation from Japan (000s)	44

Purpose of Trip	
Leisure & VFR	69.1%
Leisure/Rec./Holidays	52.8%
Visit Friends/Relatives	15.7%
Other	0.6%
Business and Convention	30.9%
Business/Professional	18.2%
Convention/Conference	11.3%
Study/Teaching	1.4%

Other Destinations Visited	
# of States Visited	2.8
# of Destinations Visited	3.7
California	65.6%
Los Angeles	28.9%
San Francisco	36.0%
San Diego	3.2%
Yosemite N.P.	20.2%
Nevada	49.1%
Las Vegas	47.5%
Utah	13.0%
Monument Valley	5.5%
Texas	8.3%
Florida	6.1%
New York	6.0%

Leisure Activities	
Dining in Restaurants	83.0%
Shopping	82.7%
Visit National Parks	58.7%
Sightseeing in Cities	58.3%
Visit Small Towns	36.3%
Casinos/Gambling	34.2%
Touring Countryside	27.8%
Guided Tours	25.5%
Visit Historical Places	24.1%
Amusement/Theme Parks	23.8%
Cultural Heritage Sites	18.6%
Concert/Play/Musical	15.2%
Art Gallery/Museum	13.6%
Camping/Hiking	11.8%
Visit Native Am. Comm.	11.1%
Golfing/Tennis	8.8%
Attend Sports Event	8.1%
Nightclubs/Dancing	7.2%
Ethnic Heritage Sites	5.1%
Water Sports/Sunbathing	5.0%
Snow Skiing	4.4%
Cruises	2.7%
Environ./Eco Excursions	1.0%
Ranch Vacations	1.0%
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:

Visitation Volume		Household Income		Party Composition	
Total Visitation from Germany (000s)	84	< \$40,000	19.0%	Avg. Travel Party (mean)	1.6
Age		\$40,000 - \$79,999	34.8%	Traveling Alone	36.9%
Male Average	43.7 years	\$80,000 - \$119,999	20.0%	Spouse	26.4%
Female Average	39.2 years	\$120,000+	26.1%	Family/Relatives	26.4%
Port of Entry		Gender		Friends	17.6%
Other	37.2%	Men	67.4%	Business Associates	3.7%
Los Angeles	27.9%	Women	32.6%	Group Tour	1.7%
Chicago	12.4%	Frequent Travelers		Adults Only	93.9%
San Francisco	9.0%	Repeat Visitor to the U.S.	69.4%	Adults and Children	6.1%
Atlanta	5.8%	U.S. Trips last 12 Months	1.7		
Washington DC	3.8%	U.S. Trips last 5 Years	5.5		
Cincinnati	3.7%	1 Trip	40.6%		
		2 - 5 Trips	37.3%		
		5+ Trips	22.1%		

Trip Behaviors:

Advance Trip Planning		Use of Packages		Information Sources	
Advance Trip Decision	133.1 days	YES	15.1%	Personal Computer	38.5%
Advance Air Reservations	86.4 days	Guided Tour	8.2%	Travel Agency	33.0%
Use of Pre-Booked Lodging	55.0 %	Air/Lodging	7.1%	State/City Travel Office	34.0%
Accommodations		Air/Lodging/Tour	5.0%	Travel Guides	28.3%
Hotel/Motel	63.7%	Air/Rental Car	2.2%	Friends/Relatives	22.7%
Private Home	24.8%	Air/Lodging/Rental Car	1.5%	Airlines Directly	23.1%
Other	16.5%	Air/Lodging/Bus	1.1%	Tour Company	8.2%
Expenditures		Air/Lodging/Bus/Tour	1.1%	Corporate Travel Dept.	6.6%
Avg. Spending Per Person Per Day	\$60	Advance Package Booking	119 days	Newspapers/Magazines	6.3%
AZ Destinations Visited		# of Nights Pre-paid as Part of a Package	12.4nights	Other	16.5%
Phoenix	51.8%	Length of Stay		Transportation in U.S.	
Grand Canyon NP	38.1%	# of Nights in Arizona (mean)	7.8	Rented Auto	61.0%
Tucson	9.8%	# of Nights in U.S. (mean)	31.7	Airlines in U.S.	20.6%
Glen Canyon NP	2.3%			Company or Private Auto	31.4%
				Taxi/Cab/Limosine	19.5%
				City Subway/Tram/Bus	10.4%

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



Total Overseas Air Visitors From Germany Profile

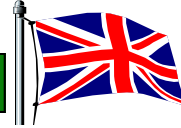
Purpose/Activities:

Purpose of Trip		Other Destinations Visited		Leisure Activities	
Leisure & VFR	79.2%	# of States Visited	3.1	Shopping	83.1%
Leisure/Rec./Holidays	57.2%	# of Destinations Visited	4.7	Dining in Restaurants	81.6%
Visit Friends/Relatives	22.0%	California	60.7%	Visit National Parks	75.1%
Other	-	Los Angeles	42.1%	Touring Countryside	65.7%
Business and Convention	20.8%	San Francisco	35.9%	Visit Historical Places	63.5%
Business/Professional	14.3%	San Diego	10.4%	Visit Small Towns	59.7%
Convention/Conference	1.1%	Yosemite N.P.	6.2%	Amusement/Theme Parks	47.8%
Study/Teaching	5.4%	Nevada	59.6%	Cultural Heritage Sites	47.2%
		Las Vegas	57.8%	Sightseeing in Cities	41.9%
		Utah	31.8%	Casinos/Gambling	39.8%
		Bryce Canyon N.P.	15.2%	Visit Native Am. Comm.	32.1%
		Colorado	5.7%	Water Sports/Sunbathing	24.7%
		Texas	7.4%	Camping/Hiking	23.0%
		Illinois	4.3%	Guided Tours	20.0%
				Art Gallery/Museum	19.6%
				Concert/Play/Musical	19.2%
				Attend Sports Event	12.1%
				Golfing/Tennis	10.9%
				Ethnic Heritage Sites	5.9%
				Nightclubs/Dancing	5.9%
				Cruises	3.4%
				Hunting/Fishing	2.3%
				Ranch Vacations	2.0%
				Snow Skiing	2.0%
				Environ./Eco Excursions	1.6%



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

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



Total Overseas Air Visitors From UK Profile*

Demographics:

Visitation Volume		Household Income		Party Composition	
Total Visitation from U.K. (000s)	87	< \$40,000	19.7%	Avg. Travel Party (mean)	1.8
		\$40,000 - \$79,999	36.0%	Spouse	50.4%
		\$80,000 - \$119,999	18.5%	Family/Relatives	28.0%
		\$120,000+	25.9%	Traveling Alone	25.0%
Age		Gender		Friends	15.1%
Male Average	47.8 years	Men	62.4%	Business Associates	2.7%
Female Average	41 years	Women	37.6%	Group Tour	1.2%
Port of Entry		Frequent Travelers		Adults Only	90.6%
Los Angeles	27.1%	Repeat Visitor to the	78.8%	Adults and Children	9.4%
Chicago	17.9%	U.S. Trips last 12 Months	2		
Other	25.3%	U.S. Trips last 5 Years	7.2		
San Francisco	10.3%	1 Trip	26.6%		
Newark	8.70%	2 - 5 Trips	48.3%		
Atlanta	6.0%	5+ Trips	25.0%		
New York	4.7%				

Trip Behaviors:

Advance Trip Planning		Use of Packages		Information Sources	
Advance Trip Decision	124.9 days	YES	24.2%	Travel Agency	46.5%
Advance Air Reservations	84.4days	Air/Lodging/Bus	3.2%	Personal Computer	40.0%
Use of Pre-Booked Lodging	70.7%	Guided Tour	14.4%	Tour Company	20.5%
		Air/Lodging	13.1%	Friends/Relatives	17.7%
		Air/Rental Car	9.8%	Airlines Directly	16.8%
		Air/Lodging/Rental Car	6.9%	Travel Guides	16.0%
		Air/Lodging/Tour	6.3%	Newspapers/Magazines	4.6%
		Air/Lodging/Bus/Tour	3.2%	Corporate Travel Dept.	4.4%
		Advance Package Booking	129.7 days	Other	2.8%
		# of Nights Pre-paid as Part of a Package	13 nights	State/City Travel Office	0.7%
Accommodations		Length of Stay		Transportation in U.S.	
Hotel/Motel	88.1%	# of Nights in Arizona (mean)	5.2	Rented Auto	63.7%
Private Home	8.0%	# of Nights in U.S. (mean)	19.8	Airlines in U.S.	42.8%
Other	6.6%			Taxi/Cab/Limousine	35.7%
				Company or Private Auto	18.4%
				City Subway/Tram/Bus	25.5%
AZ Destinations Visited					
Tucson	10.0%				
Grand Canyon NP	45.9%				
Phoenix	37.9%				
Glen Canyon NP	2.7%				

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

*Data sample was aggregated from years 2002-2003.



Total Overseas Air Visitors From UK Profile*

Purpose/Activities:

Purpose of Trip	
Leisure & VFR	86.1%
Leisure/Rec./Holidays	74.9%
Visit Friends/Relatives	10.8%
Other	0.4%
Business and Convention	13.9%
Business/Professional	10.6%
Convention/Conference	2.3%
Study/Teaching	1.0%

Other Destinations Visited	
# of States Visited	3.3
# of Destinations Visited	5.1
California	65.1%
Los Angeles	36.6%
San Francisco	28.1%
San Diego	16.9%
Yosemite N.P.	6.7%
Nevada	63.4%
Las Vegas	63.6%
Utah	22.4%
Bryce Canyon N.P.	10.6%
New York	15.5%
New Mexico	8.5%
Colorado	7.3%

Leisure Activities	
Dining in Restaurants	95.4%
Shopping	88.3%
Visit National Parks	73.6%
Touring Countryside	72.7%
Sightseeing in Cities	67.5%
Visit Small Towns	60.0%
Visit Historical Places	59.0%
Casinos/Gambling	56.5%
Cultural Heritage Sites	56.3%
Guided Tours	37.8%
Amusement/Theme Parks	34.5%
Water Sports/Sunbathing	32.9%
Visit Native Am. Comm.	30.4%
Art Gallery/Museum	29.0%
Ethnic Heritage Sites	23.1%
Concert/Play/Musical	17.3%
Nightclubs/Dancing	17.1%
Camping/Hiking	16.8%
Environ./Eco Excursions	10.4%
Ranch Vacations	9.8%
Cruises	8.8%
Golfing/Tennis	8.5%
Attend Sports Event	4.3%
Hunting/Fishing	1.2%
Snow Skiing	0.4%



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

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

*Data sample was aggregated from years 2002-2003.



Total Overseas Visitors From Mexico Profile**

Demographics:

Visitation Volume	
Total Visitation from Mexico (Air Only) (000s)	68

Age	
Male Average	39.4 years
Female Average	41.4 years

Port of Entry	
Other	67.7%
Dallas/Ft. Worth	11.6%
Houston	8.1%
Los Angeles	7.7%
Miami	3.5%
New York	1.3%

Household Income	
< \$40,000	43.0%
\$40,000 - \$79,999	23.4%
\$80,000 - \$119,999	13.5%
\$120,000+	20.2%

Gender	
Men	69.4%
Women	30.6%

Frequent Travelers	
Repeat Visitor to the	91.9%
U.S. Trips last 12 Months	4.5
U.S. Trips last 5 Years	16.8
1 Trip	9.1%
2 - 5 Trips	23.0%
5+ Trips	67.9%

Party Composition	
Avg. Travel Party (mean)	1.4
Traveling Alone	49.4%
Family/Relatives	32.6%
Spouse	17.4%
Friends	4.5%
Business Associates	3.6%
Group Tour	0.2%
Adults Only	89.2%
Adults and Children	10.8%

Trip Behaviors:

Advance Trip Planning	
Advance Trip Decision	40.8 days
Advance Air Reservations	17.4 days
Use of Pre-Booked	64.2%

Accommodations	
Hotel/Motel	62.6%
Private Home	44.7%
Other	1.0%

Expenditures	
Avg. Spending Per Person Per Day	\$167

AZ Destinations Visited	
Phoenix	78.8%
Tucson	15.4%
Grand Canyon NP	9.0%
Glen Canyon NP	0.3%

Use of Packages	
YES	5.0%
Air/Lodging	4.7%
Guided Tour	1.8%
Air/Lodging/Tour	1.8%
Air/Lodging/Bus	1.8%
Air/Lodging/Bus/Tour	1.8%
Air/Rental Car	0.9%
Air/Lodging/Rental Car	0.6%
Advance Package Booking	33.3 days
# of Nights Pre-paid as Part of a Package	8.6 nights

Length of Stay	
# of Nights in Arizona (mean)	9.1
# of Nights in U.S. (mean)	12.8

Information Sources	
Travel Agency	52.5%
Airlines Directly	16.6%
Personal Computer	14.5%
Friends/Relatives	14.0%
State/City Travel Office	9.1%
Corporate Travel Dept.	7.7%
Tour Company	4.5%
Other	4.5%
Newspapers/Magazines	1.3%
Travel Guides	0.7%

Transportation in U.S.	
Rented Auto	37.3%
Company or Private Auto	38.8%
Taxi/Cab/Limousine	26.5%
Airlines in U.S.	24.2%
City Subway/Tram/Bus	4.3%

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

** Does not include visitors arriving by land from Mexico and data was aggregated from years 2002-2003.



Total Overseas Visitors From Mexico Profile**

Purpose/Activities:

Purpose of Trip	
Leisure & VFR	62.1%
Leisure/Rec./Holidays	32.2%
Visit Friends/Relatives	26.3%
Other	3.6%
Business and Convention	37.9%
Business/Professional	29.6%
Convention/Conference	7.8%
Study/Teaching	0.5%

Other Destinations Visited	
# of States Visited	1.6
# of Destinations Visited	2.1
California	15.0%
Los Angeles	9.5%
San Francisco	2.0%
San Diego	4.7%
Nevada	14.7%
Las Vegas	13.6%
Texas	7.0%
Houston	3.6%
San Antonio	2.6%
Indiana	4.5%
New York	2.5%

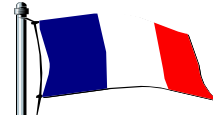
Leisure Activities	
Shopping	87.8%
Dining in Restaurants	72.3%
Visit Small Towns	28.9%
Visit National Parks	27.7%
Visit Historical Places	25.6%
Nightclubs/Dancing	15.8%
Casinos/Gambling	15.2%
Amusement/Theme Parks	15.1%
Sightseeing in Cities	13.5%
Concert/Play/Musical	12.4%
Attend Sports Event	9.7%
Touring Countryside	7.8%
Art Gallery/Museum	7.5%
Visit Native Am. Comm.	7.2%
Golfing/Tennis	6.8%
Cultural Heritage Sites	6.7%
Guided Tours	6.5%
Water Sports/Sunbathing	4.7%
Camping/Hiking	4.1%
Hunting/Fishing	2.2%
Environ./Eco Excursions	1.8%
Snow Skiing	1.8%
Ethnic Heritage Sites	1.2%
Ranch Vacations	0.8%
Cruises	0.4%



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 and data was aggregated from years 2002-2003.



Total Overseas Air Visitors From France Profile*

Demographics:

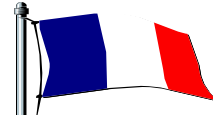
Visitation Volume		Household Income		Party Composition	
Total Visitation from France (000s)	52	< \$40,000	36.9%	Avg. Travel Party (mean)	2.2
		\$40,000 - \$79,999	29.3%	Spouse	46.4%
		\$80,000 - \$119,999	24.1%	Family/Relatives	38.8%
		\$120,000+	9.7%	Friends	21.0%
Age		Gender		Traveling Alone	16.5%
Male Average	46.8 years	Men	72.6%	Group Tour	6.2%
Female Average	43.3 years	Women	27.4%	Business Associates	2.5%
Port of Entry		Frequent Travelers		Adults Only	81.4%
Other	32.7%	Repeat Visitor to the U.S.	65.0%	Adults and Children	18.6%
Los Angeles	30.5%	U.S. Trips last 12 Months	1.7		
San Francisco	13.6%	U.S. Trips last 5 Years	6.0		
Atlanta	9.1%	1 Trip	37.3%		
Washington, DC	5.5%	2 - 5 Trips	33.7%		
New York	4.4%	5+ Trips	29.0%		
Cincinnati	4.2%				

Trip Behaviors:

Advance Trip Planning		Use of Packages		Information Sources	
Advance Trip Decision	106.1 days	YES	26.4%	Travel Agency	60.9%
Advance Air Reservations	68.4 days	Air/Lodging	14.3%	Personal Computer	20.4%
Use of Pre-Booked Lodging	54.7%	Air/Rental Car	14.2%	Travel Guides	15.4%
		Guided Tour	13.8%	Airlines Directly	11.7%
		Air/Lodging/Rental Car	11.7%	Tour Company	7.0%
		Air/Lodging/Bus	2.7%	Friends/Relatives	9.3%
		Air/Lodging/Bus/Tour	2.7%	Other	4.4%
		Air/Lodging/Tour	3.1%	Corporate Travel	2.6%
		Advance Package Booking	88.7 days	Newspapers/Magazines	1.9%
		# of Nights Pre-paid as Part of a Package	14.1 nights	State/City Travel Office	0.6%
Accommodations		Length of Stay		Transportation in U.S.	
Hotel/Motel	82.3%	# of Nights in Arizona (mean)	4.4 days	Rented Auto	67.8%
Private Home	13.3%	# of Nights in U.S. (mean)	20 days	Airlines in U.S.	39.3%
Other	9.3%			Taxi/Cab/Limousine	19.1%
				Company or Private Auto	21.6%
				City Subway/Tram/Bus	10.3%
Expenditures					
Avg. Spending Per Person Per Day	\$92				
AZ Destinations Visited					
Grand Canyon NP	43.7%				
Phoenix	33.0%				
Glen Canyon NP	9.0%				
Tucson	7.4%				

*Data sample was aggregated from years 2001-2003.

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



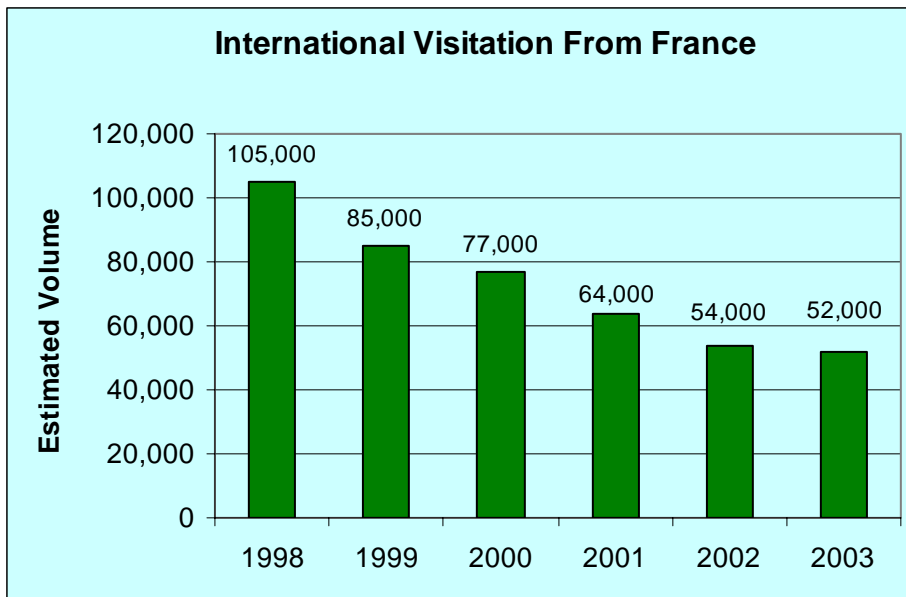
Total Overseas Air Visitors From France Profile*

Purpose/Activities:

Purpose of Trip	
Leisure & VFR	90.1%
Leisure/Rec./Holidays	75.7%
Visit Friends/Relatives	14.4%
Other	-
Business and Convention	9.7%
Business/Professional	6.5%
Convention/Conference	2.8%
Study/Teaching	0.4%

Other Destinations Visited	
# of States Visited	3.5
# of Destinations Visited	5.4
California	70.1%
Los Angeles	43.5%
San Francisco	42.3%
San Diego	13.3%
Yosemite N.P.	21.6%
Nevada	65.9%
Las Vegas	65.3%
Utah	56.1%
Bryce Canyon N.P.	27.9%
Colorado	11.4%
Florida	10.1%
New Mexico	9.4%

Leisure Activities	
Shopping	84.4%
Dining in Restaurants	81.6%
Visit National Parks	80.4%
Sightseeing in Cities	67.2%
Visit Historical Places	66.9%
Casinos/Gambling	63.7%
Visit Small Towns	55.9%
Touring Countryside	45.6%
Amusement/Theme Parks	45.3%
Cultural Heritage Sites	44.2%
Water Sports/Sunbathing	27.1%
Ethnic Heritage Sites	24.3%
Visit Native Am. Comm.	20.9%
Guided Tours	20.0%
Camping/Hiking	18.3%
Art Gallery/Museum	17.7%
Environ./Eco Excursions	16.9%
Concert/Play/Musical	7.5%
Nightclubs/Dancing	6.2%
Ranch Vacations	5.7%
Golfing/Tennis	5.6%
Cruises	3.3%
Attend Sports Event	1.6%
Hunting/Fishing	1.0%
Snow Skiing	0.3%



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

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

*Data sample was aggregated from years 2001-2003.