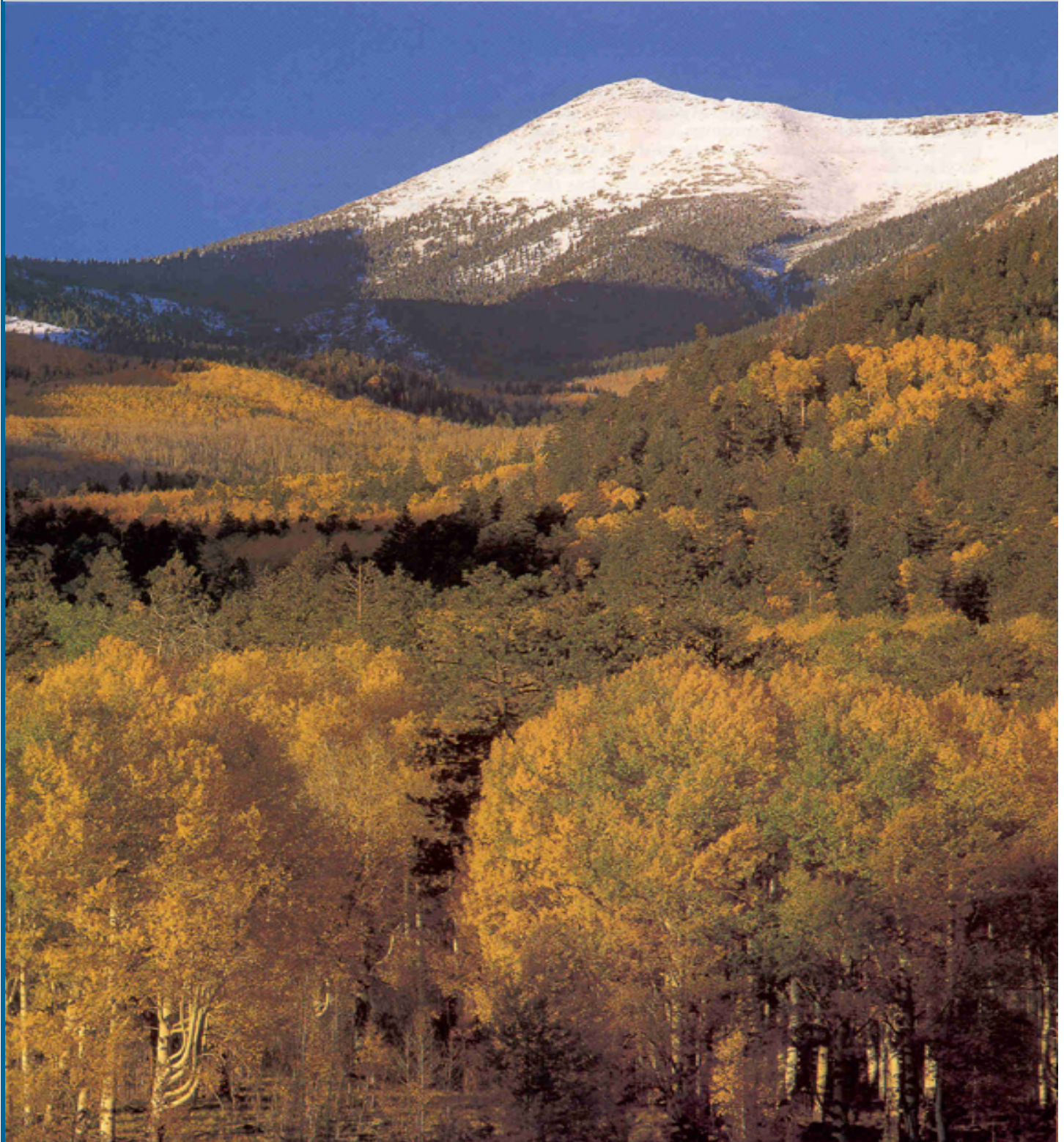


Arizona Tourism Statistical Report 2004



Arizona Office of Tourism

1110 W. Washington St, Suite 155
 Phoenix, AZ 85007
 p.602.364.3700
 f.602.364.3701
 www.azot.com
 research@azot.gov

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 Janet Napolitano, Governor, State of Arizona
 Margie Emmermann, Director
 AnnDee Johnson, Director, Research and Strategic Planning
 Audra Beyer, Research Manager

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Total Overnight Visitor Profile – 2004

Total Number of Domestic Visitors	27.8 million
Average Length of Stay	3.7 days
Average Travel Party Size	2.1 People
Average Annual Household Income	\$72,700
Average Age of Head of Household	46
Daily Expenses Per Person	\$105.61
Total Spending Per Person	\$390.76
Direct Spending	\$13.07 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

Cover Photographer Provided by: AOT, courtesy of
 Flagstaff Convention and Visitors Bureau

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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: 2004 5,833,685

Population By County	
Apache	71,320
Cochise	130,220
Coconino	129,570
Gila	54,060
Graham	36,020
Greenlee	8,350
La Paz	21,135
Maricopa	3,524,175
Mohave	180,210
Navajo	107,420
Pima	931,210
Pinal	219,780
Santa Cruz	41,985
Yavapai	196,760
Yuma	181,470



Source: Arizona Department of Economic Security

Top Tourist Attractions	2004 Attendance	Top Natural Tourist Attractions	2004 Attendance
1. Bank One Ballpark	2,781,934	1. Grand Canyon National Park	4,672,911
2. Tempe Town Lake	2,250,000	2. Saguaro National Park	3,601,775
3. London Bridge	2,000,000	3. South Mountain Park	2,500,000
4. America West Arena	1,265,543	4. Glen Canyon National Rec. Area**	1,861,773
5. The Phoenix Zoo	1,240,000	5. Lake Mead National Rec. Area	1,717,975
6. Arizona State University Sun Devil Stadium	749,632	6. Canyon de Chelly	936,007
7. WestWorld of Scottsdale	669,890	7. Montezuma Castle Nat. Monument	656,409
8. Rawhide Western Town & Steakhouse	610,000	8. Lake Pleasant Regional Park	589,937
9. Tombstone	600,000	9. Petrified Forest Nat. Park	580,000
10. Arizona-Sonora Desert Museum	470,000	10. Lake Havasu State Park	384,928

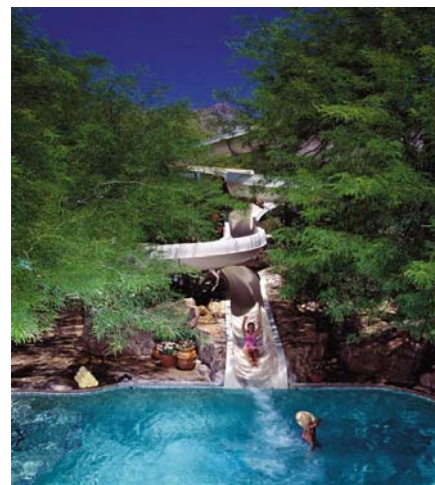
**Visitation count reflects visitors who accessed the park on the AZ side by car

Introduction

The *Arizona Tourism Statistical Report 2004* 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.



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..."



Tlaquepaque Arts and Crafts Village

Executive Summary

Domestic overnight visitation to Arizona remained constant in 2004, with 27.8 million travelers visiting the state. However, nationally the total overnight travel volume increased 4.4 percent.

Direct Spending among domestic overnight travelers to Arizona increased 7.7 percent, from \$12.14 billion to \$13.09 billion in 2004. Nationally, overnight direct spending also increased 7.7 percent in 2004.

Non-resident travelers made up 68% of Arizona's domestic overnight travel in 2004. Overnight leisure is an important travel segment for Arizona, representing 44 percent of the person-trips, significantly higher than the average US destination. The remaining 56 percent includes day-trips and overnight business.

The average party size among total domestic overnight travelers was 2.1 persons per trip. In 2004, couples made up 28 percent of all visiting parties decreasing 3 percent from 2003. Families made up 20 percent of the travel parties in 2004, up 3 percent from the previous year. The average length of stay among Arizona overnight travel parties increased to an average of 3.7 nights in 2004 compared to 3.3 nights in 2003. The percent of overnight leisure travelers staying in Arizona four to seven nights increased to 27 percent, significantly higher than the average US destination.

The average Arizona domestic overnight visitor spent \$105.61 per person per day in 2004, down slightly from \$106.26 in 2003.

Overnight leisure travelers came to



Paria Canyon, photo by Thomas Whetten

Arizona mainly to visit friends and relatives (37%), getaway weekends (21%) and general vacations (18%). Getaway weekends were up 3 percent following the travel trend of shorter trips in 2003.

Arizona experienced a 29 percent increase in overseas visitors in 2004, while the U.S. experienced an increase of 12.7 percent, excluding travel from people from Canada and Mexico.



Arizona Lodging Performance

Arizona's lodging performance continued to show positive growth in 2004. All of the five lodging indicators: occupancy, average daily room rate (ADR), revenue generated per available room (RevPAR), demand, and supply increased in 2004. Arizona's occupancy rate outperformed the nation and the mountain region, growing 5.5 percent, up to 62.8 percent. Nationally, the lodging occupancy rate increased 3.7 percent to a rate of 61.3%. Statewide, Arizona's ADR increased 3.6% to \$85.47. Arizona's ADR rate at year end was lower than the ADR rate nationally (\$86.41) and in the mountain region (\$88.23). Arizona's RevPAR was up 9.3 percent in 2004 to \$53.68. Arizona's RevPAR rate was higher

than the national rate (\$52.93) but below the rate for the mountain region in 2004 (\$55.84).

Directly related to the increased numbers, statewide demand was up 5.6%. Supply in the state remained relatively stable, increasing 0.1%. Statewide demand was 23.1 million rooms and statewide supply was 36.9 million rooms.

In looking at the lodging performance throughout the state, Metro Phoenix occupancy rates increased 7.3% with a rate of 36.6%. Average Daily Rates increased by 3.3 percent, up to \$97.42. RevPAR also increased in 2004, up 10.8 percent to \$62.01. Metro Phoenix's actual

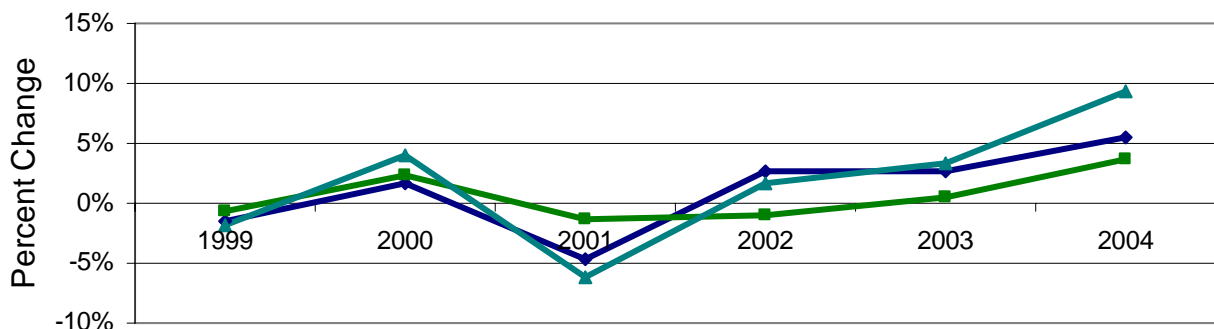
occupancy rate, ADR and RevPar exceeded state, region and national rates in 2004.

Metro Tucson occupancy rates increased by 3.1 percent, up to 62.8% in 2004. Average Daily Rates increased 2.1% to \$49.79. RevPAR for Metro Tucson was \$49.79, an increase of 5.2 percent. Room demand increased by 3.9 percent, while room supply stayed flat.

The non-metro areas of Arizona surged in all five indicators. Occupancy increased 4.2% to a rate of 61.8%. ADR increased 3.4% to a rate of \$67.08. RevPAR rate was \$41.44, up 7.8% from 2003. Demand for lodging in non-metro areas of Arizona increased 5.2% or 6.57 million rooms.

	Occupancy		Average Daily Rate		RevPAR		Demand		Supply	
	2004	% Change	2004	% Change	2004	% Change	2004	% Change	2004	% Change
United States	61.3%	3.7%	\$86.41	4.0%	\$52.93	7.8%	997.8 mil.	4.6%	1.62 bill.	1.0%
Mountain Region	63.3%	3.8%	\$88.23	5.3%	\$55.84	9.2%	122.5 mil.	4.5%	193.5 mil.	0.7%
State of Arizona	62.8%	5.5%	\$85.47	3.6%	\$53.68	9.3%	23.1 mil.	5.6%	36.78 mil.	0.1%
Metro Phoenix	63.6%	7.3%	\$97.42	3.3%	\$62.01	10.8%	12.7 mil.	6.6%	19.9 mil.	-0.6%
Metro Tucson	62.8%	3.1%	\$79.25	2.1%	\$49.79	5.2%	3.35 mil.	3.9%	5.33 mil.	0.8%
Non-Metro AZ	61.8%	4.2%	\$67.08	3.4%	\$41.44	7.8%	6.57 mil.	5.2%	10.6 mil.	0.9%

Statewide Lodging Performance



Source: Smith Travel Research

◆ Occupancy Rates ■ ADR ▲ RevPAR



Arizona Lodging Performance

2004 County Lodging Performance

	Occupancy	Room Rate	RevPAR	Demand	Supply
Apache	48.3%	\$64.52	\$31.19	158,625	328,135
% Change from 2003	-5.1%	0.9%	-4.2%	-5.1%	0.0%
Cochise	64.6%	\$52.14	\$33.69	599,285	927,465
% Change from 2003	5.7%	3.3%	9.3%	8.5%	2.6%
Coconino	62.1%	\$67.44	\$41.85	2,332,097	3,758,089
% Change from 2003	5.8%	3.5%	9.5%	6.4%	0.6%
Gila	57.8%	\$57.41	\$33.19	227,230	393,105
% Change from 2003	4.0%	3.3%	7.4%	4.0%	0.0%
Graham	56.1%	\$54.40	\$30.54	77,451	137,970
% Change from 2003	4.7%	4.2%	9.1%	4.7%	0.0%
Greenlee		NA			
% Change from 2003					
La Paz		NA			
% Change from 2003					
Maricopa	63.7%	\$98.25	\$62.62	12,377,402	19,421,329
% Change from 2003	7.4%	3.2%	10.9%	6.8%	-0.6%
Mohave	61.4%	\$60.03	\$36.84	991,643	1,615,855
% Change from 2003	-0.2%	11.4%	11.2%	1.4%	1.6%
Navajo	51.4%	\$57.10	\$29.35	590,277	1,148,290
% Change from 2003	-4.1%	5.4%	1.1%	-4.1%	0.0%
Pima	62.8%	\$79.25	\$49.79	3,352,588	5,336,705
% Change from 2003	3.1%	2.1%	5.2%	3.9%	0.8%
Pinal	60.7%	\$68.03	\$41.33	347,878	572,685
% Change from 2003	1.7%	5.6%	7.5%	1.7%	0.0%
Santa Cruz	61.8%	\$60.28	\$37.26	215,698	348,940
% Change from 2003	7.7%	0.2%	7.9%	7.7%	0.0%
Yavapai	64.0%	\$93.48	\$59.81	1,084,181	1,694,365
% Change from 2003	1.4%	2.7%	4.0%	2.7%	1.3%
Yuma	69.7%	\$61.35	\$42.73	604,091	867,300
% Change from 2003	10.1%	5.2%	15.8%	11.0%	0.9%

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



Arizona Tourism Related Tax Revenues

Tourism sectors (lodging, restaurant/bar, retail, and amusements) generated more than \$475 million in tax revenue, a 9.1 percent increase over 2003. Tax revenues increased for each of the tourism related sectors.

Hotel/Motel increased 9.0 percent to \$99.6 million in 2004. Restaurant/Bar sector had the highest percentage increase over the

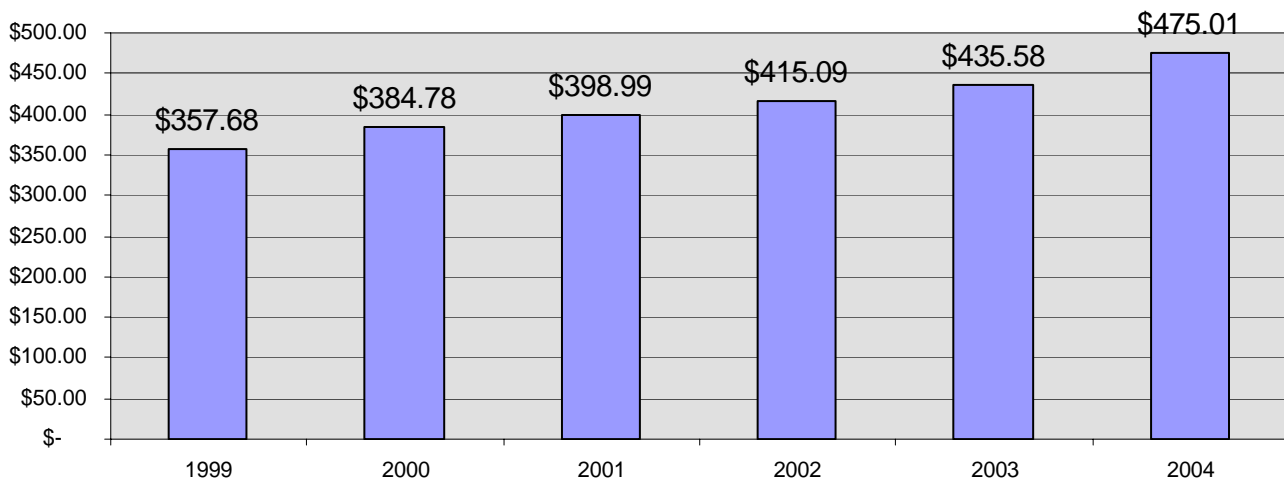
previous year up 9.8% with revenues over \$100 million. The retail sector increased 8.9 percent in 2004. The retail sector is the largest revenue generator of the four sectors, bring in \$272 million in 2004. Finally, Amusements sector also experienced revenue growth, up 5.2 percent from the previous year to a total of \$3 million.



Yuma, AZ

Arizona Tourism Related Tax Revenues			
	2004	2003	% Change
Hotel/Motel	\$99,629,247	\$91,393,280	9.0%
Restaurant/Bar	\$100,302,238	\$91,386,645	9.8%
Retail	\$272,073,608	\$249,942,254	8.9%
Amusements	\$3,007,407	\$2,857,911	5.2%
Total	\$475,012,500	\$435,580,090	9.1%

Tourism Taxes



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

In 2004, total airport passenger traffic increased in Arizona, even though the number of leisure travelers visiting the state remained constant. In 2004, more than 44 million passengers passed through Arizona's airports, an increase of 5.9 percent from the previous year.

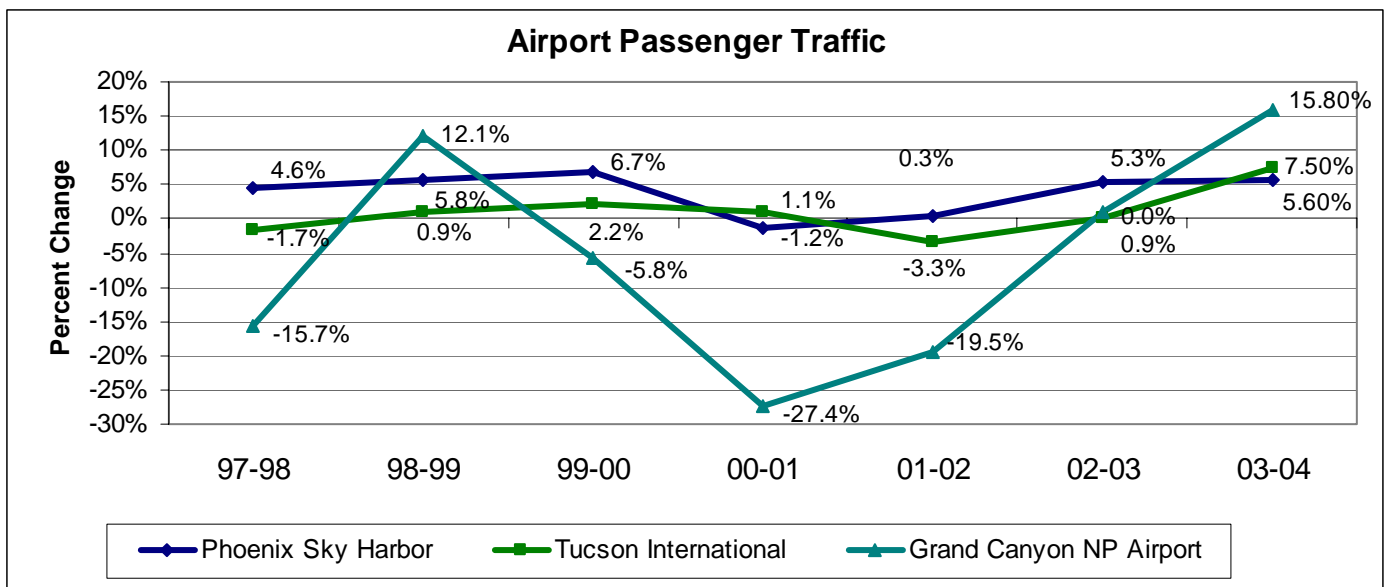
Sky Harbor remains the nation's sixth busiest airport and

the twelfth busiest airport in the world. Passenger traffic through Sky Harbor increased 5.6 percent in 2004, with over 39 million people passing through the airport. Tucson International Airport increased 7.5 percent over the previous year to over 3.7 million passengers. The Yuma International Airport also had a strong year end, up 10.3 percent from the previous year, tracking

119,309 passengers. The Grand Canyon National Park Airport had the largest percentage increase in passenger traffic in 2004, up 15.8 percent to 769,772 passengers.

Arizona Airport Passenger Traffic			
	2004	2003	% Change
Grand Canyon	769,772	664,932	15.8%
Phoenix Sky Harbor	39,504,898	37,423,502	5.6%
Tucson International	3,770,445	3,508,868	7.5%
Yuma International	119,309	108,187	10.3%
Total	44,164,424	41,705,489	5.9%

Source: Information supplied by the airports themselves



Source: Information supplied by the airports themselves



Arizona State Parks Visitation

In 2004, visitation to Arizona's State Parks increased 3.1 percent from the previous year. Of the 28 state parks throughout the state, 18 parks posted increased visitation for this year. The continued drought continued to have impacts on water levels at lakes and thus affecting visitation at several of the State Parks. Also, because of the drought, fire restrictions were in place throughout the state at a majority of recreation areas for a large portion of the year.

The largest increase of visitation was at Lyman Lake State Park just outside of Springerville, increasing 36.0 percent with visitation totaling 32,304. The increased visitation can be attributed to the addition and promotion of the park's

cabins and yurts. Dead Horse Ranch State Park, in northern Arizona, had 99,234 visitors and increase of 13.8 percent from 2003.

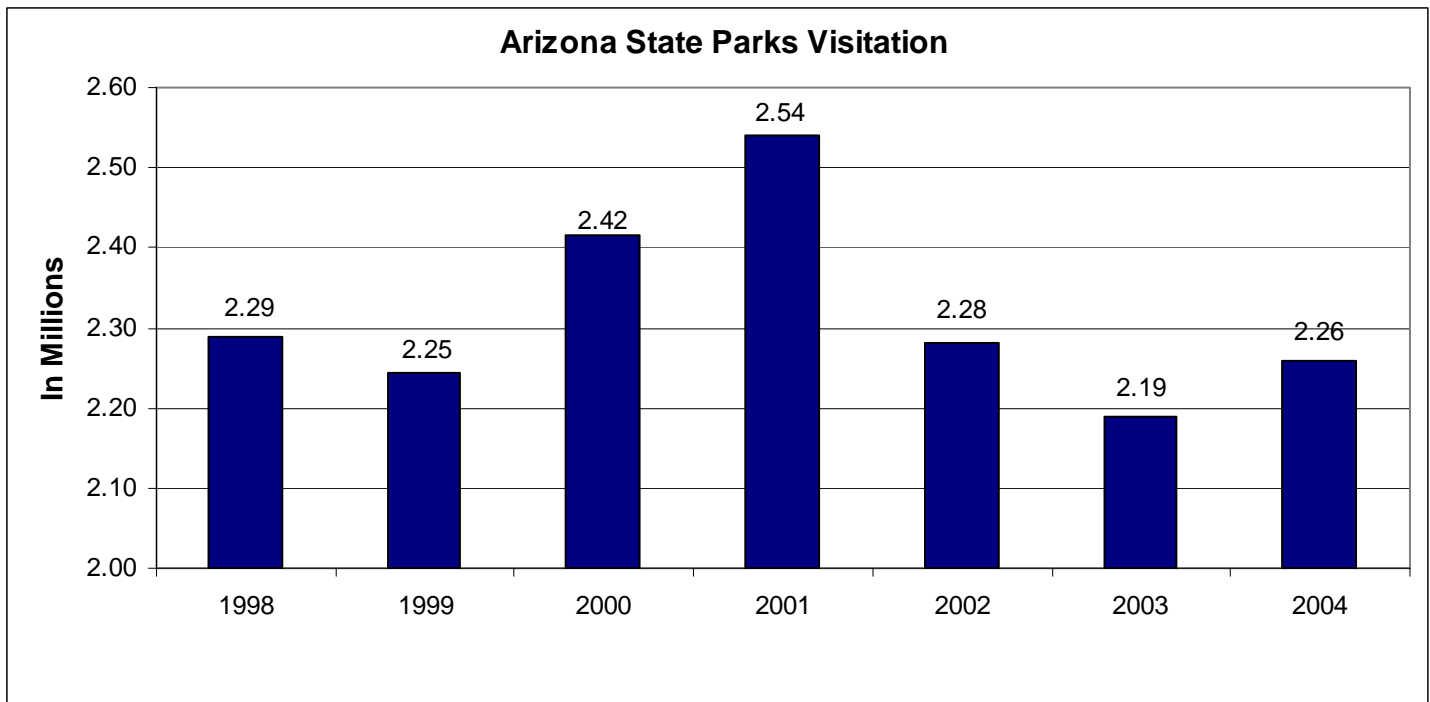
Visitation at Alamo Lake in the Western part of the state decreased by 41.6 percent from previous years, mostly due to low lake levels in 2004.



Red Rock State Park, © Arizona State Parks

Top 5 Most Visited State Parks	
State Park	2004
Lake Havasu	384,928
Slide Rock	254,584
Patagonia Lake	204,636
Kartchner Caverns	203,464
Catalina	125,495

Source: Arizona State Parks



Source: Arizona State Parks



Arizona State Parks Visitation

	2004	2003	% Change
All State Parks	2,264,227	2,196,698	3.1%
Alamo Lake	30,080	51,487	-41.6%
Boyce Thompson	70,900	70,949	-0.1%
Buckskin Mountain	85,733	94,461	-9.2%
Catalina	125,495	119,698	4.8%
Cattail Cove	113,820	109,280	4.2%
Dead Horse Ranch	99,234	87,216	13.8%
Fool Hollow Lake	67,936	69,240	-1.9%
Fort Verde	15,665	15,282	2.5%
Homolovi	17,403	18,692	-6.9%
Jerome	52,949	47,235	12.1%
Kartchner Caverns	203,464	187,437	10.9%
Lake Havasu	384,928	369,317	4.2%
Lost Dutchman	68,241	67,765	0.7%
Lyman Lake	32,304	23,745	36.0%
McFarland	3,346	3,208	4.3%
Oracle	8,304	8,778	-5.4%
Patagonia Lake	204,636	202,230	1.2%
Picacho Peak	61,671	58,346	5.7%
Red Rock	76,279	70,782	7.8%
Riordan Mansion	24,932	23,166	7.6%
Roper Lake	39,902	36,703	8.7%
San Rafael*	0	0	0.0%
Slide Rock	254,584	229,770	10.8%
Tombstone Courthouse	50,124	49,061	2.2%
Tonto Natural Bridge	88,174	96,663	-8.8%
Tubac Presidio	15,770	17,121	-7.9%
Yuma Crossing	11,954	13,479	-11.3%
Yuma Prison	56,399	59,587	-5.4%

Source: Arizona State Parks

*San Rafael is currently not open to the public



Arizona National Parks Visitation

Overall visitation to Arizona's National Parks increased 1.1 percent in 2004. Over 11.7 million people visited the 21 National Parks located throughout the state. Some large increases occurred in the northern region: Canyon de Chelly National Monument increased 8.0 percent, Grand Canyon National Park increased 4.9 percent and Walnut Canyon National Monument increased.

Parks located in the northeastern part of Arizona had mixed results. Canyon de Chelly NM's visitation was up 8 percent and is one of the top most visited National Parks. Navajo NM, Petrified Forest NP, and Hubbell Trading Post NHS all lost visitors last year.

Southern Arizona's National Parks also visitation gains and losses in 2004. Visitation to Fort Bowie NHS was up 12.3 percent, while Chiricahua NM was down 19.4 percent from the previous year. Summer wildfires in the region could have contributed to the overall decrease in visitation at the park.

Top 5 Most Visited National Parks	
National Park	2004
Grand Canyon NP	4,326,234
Lake Mead NRA*	1,619,263
Glen Canyon NRA	1,531,525
Canyon de Chelly NM	936,007
Saguaro NP	651,464

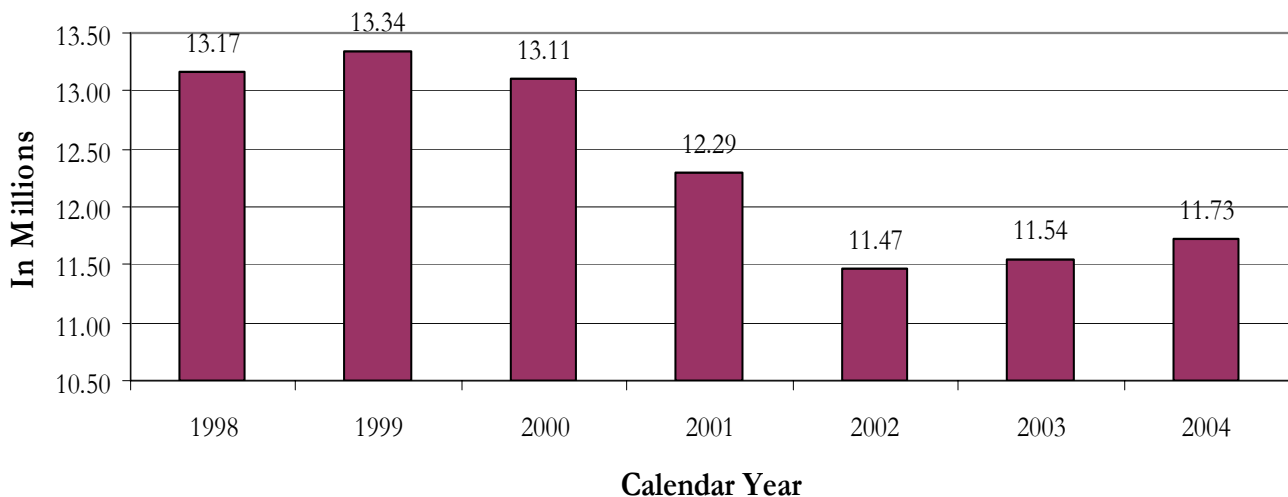
*Kingman Wash area closed due to construction

Source: National Park Service



Coronado NM

Arizona National Parks Visitation



Source: National Park Service



Arizona National Parks Visitation

	2004	2003	% Change
All Arizona National Parks	11,729,025	11,596,801	1.1%
Canyon de Chelly NM	936,007	866,498	8.0%
Casa Grande NM	93,933	87,687	7.1%
Chiricahua NM	36,245	44,976	-19.4%
Coronado NM	89,591	89,309	0.3%
Fort Bowie NHS	9,483	8,445	12.3%
Glen Canyon NRA	1,531,525	1,487,583	3.0%
Grand Canyon NP	4,326,234	4,125,312	4.9%
Hubbell Trading Post NHS	130,411	163,883	-20.4%
Lake Mead NRA**	1,619,263	1,682,093	-3.7%
Montezuma Castle NM	644,452	637,024	1.2%
Navajo NM	65,246	76,620	-14.8%
Organ Pipe Cactus NM	229,584	277,566	-17.3%
Petrified Forest NP	580,000	586,245	-1.1%
Pipe Spring NM	57,569	56,341	2.2%
Saguaro NP	651,464	643,697	1.2%
Sunset Crater Volcano NM*	126,911	159,073	-20.2%
Tonto NM	63,217	59,216	6.8%
Tumacacori NHP	48,502	52,393	-7.4%
Tuzigoot NM	114,486	115,216	-0.6%
Walnut Canyon NM	126,931	111,465	13.9%
Wupatki NM	247,971	266,159	-6.8%

The above figures are for recreational visitors only.

*Sunset Crater Volcano visitor center closed March 2004 for installation of new exhibits. Closure lasted 3 months. Other areas in park are open.

**Kingman Wash area closed due to construction. Visitation numbers for Arizona visitors only.

Source: National Park Service



Domestic Overnight Visitation

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

Domestic overnight visitation to Arizona was flat in 2004, with 27.8

million travelers to the state. However, U.S. domestic overnight travel volume increased, up 4.4 percent from 2003.

Total domestic overnight person-trips was driven by the leisure segment, accounting for 21.6 million person trips in 2004, a slight decrease from 2003. Domestic overnight business travel increased slightly, leaving the

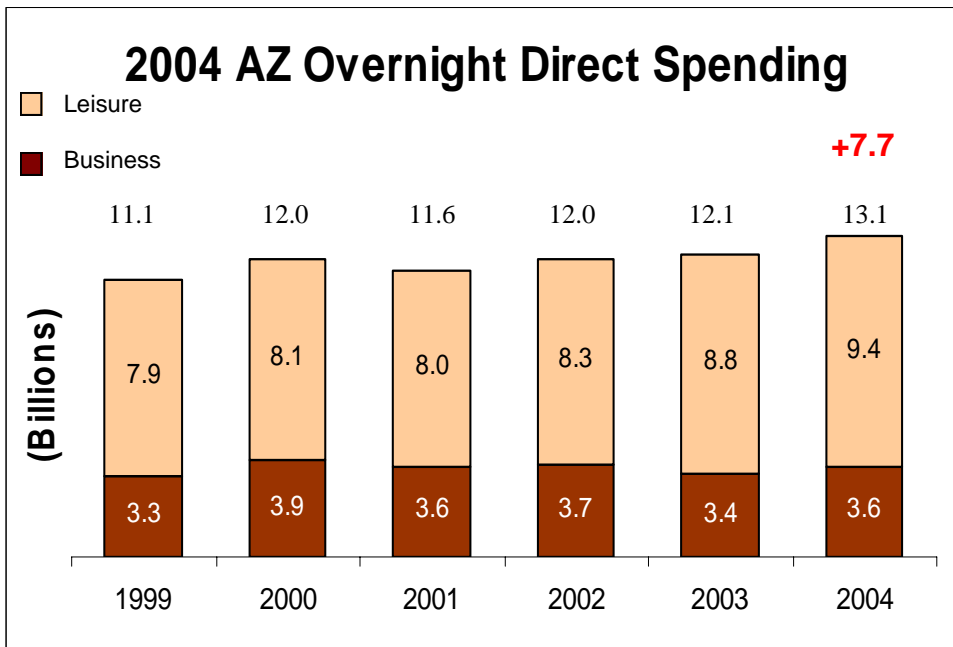
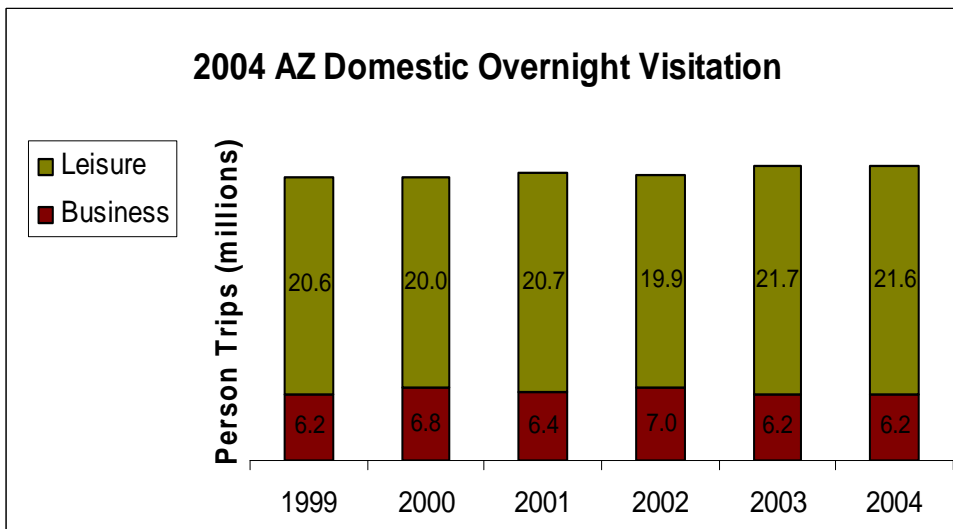
total overnight person-trip volume consistent with 2003. Nationally, overnight leisure volume increased 4.3% and overnight business volume increased 4.9%.

Arizona's overnight leisure segment is composed predominately of non-residents, accounting for 72% of the person-trip volume. In 2004, non-resident leisure overnight travel decreased 4.4 percent. Resident leisure overnight travel increased 10.2 percent compared to 2003.

The average party size among total domestic overnight travelers was 2.1 people per trip in 2004. Overnight leisure average party size increased in 2004, from an average of 2.2 people per party to 2.3 people per party.

Spending per person fell slightly, but total direct spending among domestic overnight travelers rose 7.7 percent, from \$12.14 billion in 2003 to \$13.07 billion in 2004. Contributing to this increase in direct spending was the increased length of stay of domestic overnight visitors. The average length of stay increased from 3.32 nights in 2003 to 3.72 nights in 2004.

The average domestic overnight visitor spent \$105.61 per person per day in 2004, down slightly from \$106.26 in 2003. Domestic overnight business travelers spent the most per person per day, although this spending level declined from \$136.18 in 2003 to \$135.31 in 2004. Domestic overnight leisure travelers spent an average of \$97 per person per day in 2004, a slight decrease from \$98 per person per day levels in 2003.



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



Total Domestic Overnight Visitor Profile

2004 Quick Facts: Visitor Profile	
Estimated Volume	27.8 Million
Average Length of Stay	3.7 days
Average Party Size	2.1
Spending Per Person Per Day	\$105.61
Total Direct Spending	\$13.07 Billion

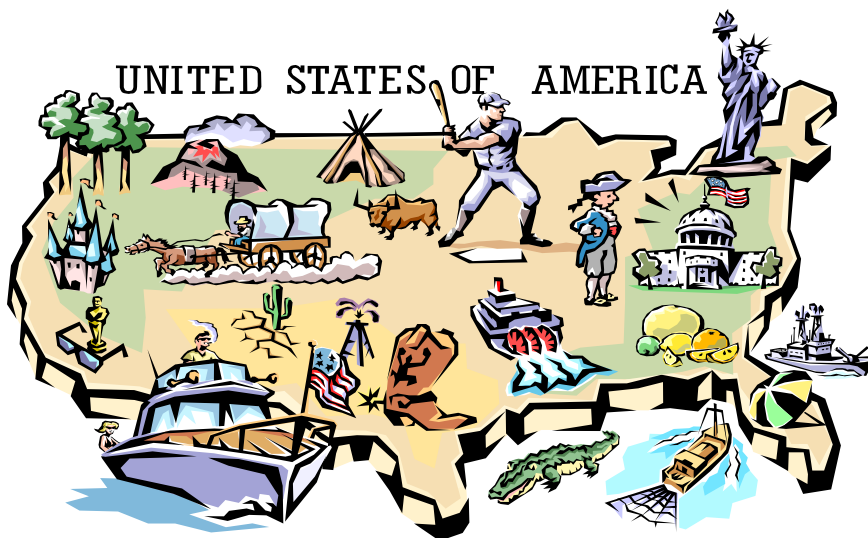
In 2004, top origin markets for domestic overnight visitors to Arizona included California and Arizona itself.

Of the overnight travel volume, the majority (78%) visited for leisure purposes. The average age of the domestic overnight traveler to Arizona increased from 45 years old to 46 years old in 2004. The percentage of overnight visitors of age 55+

increased 2 percent in 2004 to 27% of all overnight visitors. This percent share is higher than the proportion of US travelers 55+ (22%). A large share (43%) of the overnight visitors to Arizona had household incomes of \$75,000 or greater in 2004.

Origin State	
Arizona	32.7%
California	25.2%
Illinois	4.5%
New Mexico	3.6%
Texas	3.5%

Origin DMA	
Phoenix	23.6%
Los Angeles	15.9%
Tucson (Sierra Vista)	8.3%
Albuquerque—Santa Fe	3.6%
Chicago	3.5%



Demographics:

Household Income	
Average HH Income	\$72,700
<\$25,000	10%
\$25K-\$49,999	24%
\$50K-\$74,999	23%
\$75,000+	43%

Education	
No College	22%
Attended College	37%
College Degree	20%
Post-Grad. Degree	20%

Life Stage	
18-34/No children	12%
18-34/Children	18%
35-54/No children	21%
35-54/Children/<\$50K	7%
35-54/Children/\$50K+	15%
55+/No children/<\$50K	8%
55+/No children/\$50K+	18%

Age	
Average (years)	46.0
18-34 years	30%
35-54 years	43%
55+ years	27%

Occupation	
Manager, Prof.	38%
Tech., Sales, Admin.	21%
Service	4%
Other	12%
Retired	12%
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)	41%
Hotel	48%
Paid non/hotel	8%
Other	2%

Transportation	
Auto	58%
Air	30%
Other	12%

Length of Stay	
Average	3.7 nights
1-3 Nights	64%
4-7 Nights	27%
8+ Nights	10%

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

Trip Distance	
Average Distance (miles)	719
Under 100 Miles	4%
101-300 Miles	33%
301-500 Miles	18%
501-700 Miles	10%
701-1,000 Miles	5%
Over 1,000 Miles	30%

Expenditures	
Average (per person per day)	\$105.61
Transportation	32.1%
Food	21.2%
Room	16.6%
Shopping	13.2%
Entertainment	10.7%
Other	6.2%

Reservation Type	
Accommodation	
No Reservation	33%
Reservation	67%
Computer/Internet	16%
Direct to Location	14%
Toll-Free Number	14%
Other	13%
Corporate Travel	5%
Travel Agent	5%

Reservation Type	
Transportation	
No Reservation	36%
Reservation	64%
Computer/Internet	27%
Toll-Free Number	18%
Other	11%
Corporate Travel	6%
Travel Agent	2%

Party Composition	
Avg. Party Size	2.1
One Adult	40%
MM/FF	6%
3+ Adults	6%
Couples	28%
Families	20%

Activities	
General Spending (Net)	41%
Dining	32%
Shopping	22%
Entertainment	20%
Outdoor Sports (Net)	12%
Adventure Sports	3%
Hunt/Fish	2%
Golf	4%
Boat/Sail	2%
Nature (Net)	28%
Hike/Bike	7%
Camping	4%
National/State Parks	17%
Beach/Waterfront	3%
Eco-Travel	5%
Sightseeing (Net)	33%
Sightseeing	31%
Group Tour	4%
Attractions (Net)	17%
Theme Park	1%
Sporting Event	6%
Night Life	7%
Gamble	6%
Shows	2%
Culture (Net)	18%
Historic Site	9%
Concert/Play/Dance	4%
Museum/Art Exhibit	4%
Festival/Craft Fair	4%

Satisfaction with Destination	
Average (10 pt. scale)	7.6
8-10 Excellent	61%
4-7 Fair/Good	34%
1-3 Poor	6%

Value of Destination	
Average (10 pt. scale)	7.4
8-10 Excellent	57%
4-7 Fair/Good	38%
1-3 Poor	5%

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



Total Domestic Overnight Non-Resident Visitor Profile

Overnight non-resident travel decreased 3.7 percent in 2004. Non-resident overnight travel decreased in both the leisure and business segments. Non-resident leisure travel accounted for 68 percent of overnight travel with a

volume of 19 million person-trips in 2004. The majority of non-resident overnight travelers were from California, followed by Illinois and New Mexico.

Spending per day by domestic overnight non-residents remained the same in 2004 at \$112 on average per person per day.

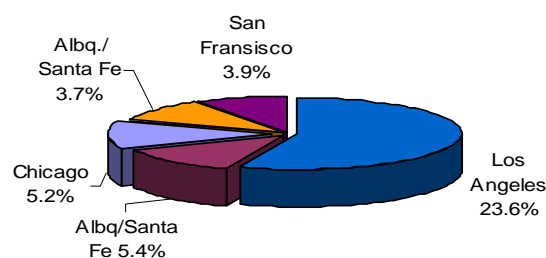
The average stay length increased 12.7 percent to an average of 4.4 nights. In addition, the average party size increased 5.8 percent to 2 people per travel party. The average household income for non-resident travelers rose 1.4 percent from \$78,000 to \$79,100 in 2004.

2004 Quick Facts: Visitor Profile	
Estimated Volume	19.0 Million
Average Length of Stay	4.4 days
Average Party Size	2.0
Spending Per Person Per Day	\$112.18
Total Direct Spending	\$11.14 Billion



Lake Havasu, AZ

Top 5 Origin DMA's



Origin State	
California	37.5%
Illinois	6.6%
New Mexico	5.4%
Texas	5.3%
Nevada	3.7%

Origin DMA	
Los Angeles	23.6%
Albuquerque—Santa Fe	5.4%
Chicago	5.2%
San Diego	4.3%
San Francisco	3.9%

Demographics:

Household Income	
Average HH Income	\$79,100
<\$25,000	7%
\$25K-\$49,999	21%
\$50K-\$74,999	21%
\$75,000+	50%

Education	
No College	24%
Attended College	37%
College Grad.	23%
Post-Grad. Degree	17%

Life Stage	
18-34/No children	11%
18-34/Children	14%
35-54/No children	22%
35-54/Children/<\$50K	4%
35-54/Children/\$50K+	17%
55+/No children/<\$50K	9%
55+/No children/\$50K+	21%

Age	
Average (years)	47.0
18-34 years	25%
35-54 years	43%
55+ years	33%

Occupation	
Manager, Prof.	36%
Tech., Sales, Admin.	22%
Service	5%
Other	12%
Retired	14%
Not Employed	12%

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)	43%
Hotel	48%
Paid non/hotel	7%
Other	2%

Transportation	
Auto	45%
Air	43%
Other	12%

Length of Stay	
Average	4.4 nights
1-3 Nights	54%
4-7 Nights	33%
8+ Nights	12%

Quarter of Travel	
Quarter 1	31%
Quarter 2	24%
Quarter 3	23%
Quarter 4	22%

Trip Distance	
Average Distance (miles)	979
Under 100 Miles	-
101-300 Miles	9%
301-500 Miles	24%
501-700 Miles	14%
701-1,000 Miles	7%
Over 1,000 Miles	45%

Expenditures	
Average (per person per day)	\$112.18
Transportation	34.9%
Food	20.5%
Room	15.2%
Shopping	13.6%
Entertainment	10.1%
Other	5.7%

Reservation Type	
Accommodation	
No Reservation	31%
Reservation	69%
Computer/Internet	17%
Other	14%
Toll-Free Number	13%
Direct to Location	12%
Corporate Travel	6%
Travel Agent	6%

Reservation Type	
Transportation	
No Reservation	30%
Reservation	70%
Computer/Internet	37%
Toll-Free Number	13%
Other	9%
Corporate Travel	8%
Travel Agent	2%

Party Composition	
Avg. Party Size	2.0
One Adult	41%
MM/FF	6%
3+ Adults	6%
Couples	31%
Families	16%

Activities	
General Spending (Net)	46%
Dining	36%
Shopping	27%
Entertainment	22%
Outdoor Sports (Net)	14%
Adventure Sports	4%
Hunt/Fish	3%
Golf	6%
Boat/Sail	3%
Nature (Net)	33%
Hike/Bike	7%
Camping	5%
National/State Parks	21%
Beach/Waterfront	4%
Eco-Travel	6%
Sightseeing (Net)	40%
Sightseeing	34%
Group Tour	6%
Attractions (Net)	16%
Theme Park	-
Sporting Event	6%
Night Life	6%
Gamble	6%
Shows	1%
Culture (Net)	18%
Historic Site	10%
Concert/Play/Dance	2%
Museum/Art Exhibit	5%
Festival/Craft Fair	4%

Satisfaction with Destination	
Average (10 pt. scale)	7.8
8-10 Excellent	66%
4-7 Fair/Good	30%
1-3 Poor	4%

Value of Destination	
Average (10 pt. scale)	7.6
8-10 Excellent	60%
4-7 Fair/Good	37%
1-3 Poor	3%

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



Total Domestic Overnight Resident Visitor Profile

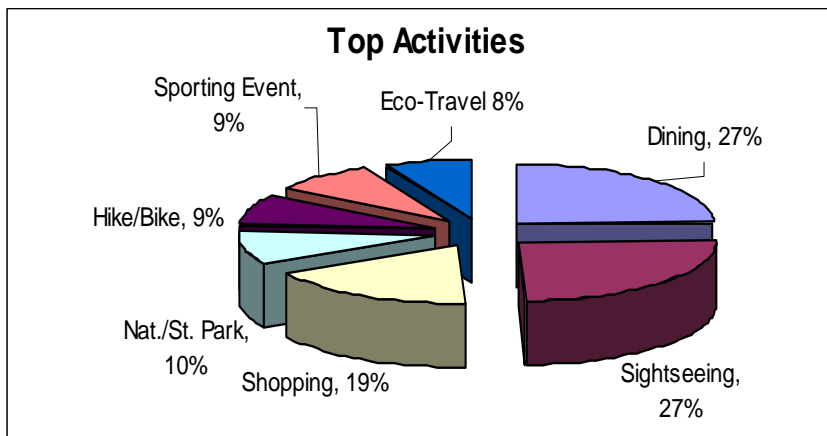
2004 Quick Facts: Visitor Profile	
Estimated Volume	8.8 Million
Average Length of Stay	2.2 days
Average Party Size	2.1
Spending Per Person Per Day	\$78.98
Total Direct Spending	\$1.94 Billion

Origin DMA	
Phoenix	71.9%
Tucson (Sierra Vista)	25.5%

Overnight resident travel increased 8.6 percent in 2004. Resident overnight travel accounted for 32 percent of the overnight person-trips last year. The increase in travel was influenced by increases in both resident leisure and resident business travel. The average party size among resident travelers was 2.1 persons in 2004. Direct spending by domestic overnight resident travelers increased 4.6 percent, up to \$1.94 billion from \$1.85 billion. This increase occurred as a result of increases in

both the number of person-trips by residents and also an increase of 4.6 percent in the average stay length. The majority of overnight travelers were from either Phoenix (71.9%) or Tucson (25.5%) in 2004.

The timing of resident travel is relatively equal between the four quarters, with slightly higher travel occurring in the fourth quarter and lower travel tendencies during the first quarter of the year.



Flagstaff Arboretum

Demographics:

Household Income	
Average HH Income	\$59,600
<\$25,000	15%
\$25K-\$49,999	29%
\$50K-\$74,999	27%
\$75,000+	28%

Education	
No College	19%
Attended College	39%
College Degree	15%
Post-Grad. Degree	27%

Life Stage	
18-34/No children	15%
18-34/Children	27%
35-54/No children	17%
35-54/Children/<\$50K	14%
35-54/Children/\$50K+	12%
55+/No children/<\$50K	5%
55+/No children/\$50K+	11%

Age	
Average (years)	42.0
18-34 years	42%
35-54 years	42%
55+ years	16%

Occupation	
Manager, Prof.	44%
Tech., Sales, Admin.	18%
Service	1%
Other	11%
Retired	8%
Not Employed	17%

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



Total Domestic Overnight Resident Visitor Profile

Trip Behaviors:

Purpose of Stay	
Business	24%
Leisure	76%

Accommodations	
Non-Paid (Net)	38%
Hotel	48%
Paid non/hotel	10%
Other	4%

Transportation	
Auto	88%
Air	1%
Other	11%

Length of Stay	
Average	2.2 nights
1-3 Nights	86%
4-7 Nights	11%
8+ Nights	3%

Quarter of Travel	
Quarter 1	22%
Quarter 2	26%
Quarter 3	25%
Quarter 4	27%

Trip Distance	
Average Distance (miles)	185
Under 100 Miles	13%
101-300 Miles	82%
301-500 Miles	5%

Expenditures	
Average (per person per day)	\$78.98
Food	25.3%
Room	24.8%
Transportation	16.2%
Entertainment	13.8%
Shopping	10.9%
Other	9.0%

Reservation Type	
Accommodation	
No Reservation	38%
Reservation	62%
Direct to Location	19%
Toll-Free Number	15%
Computer/Internet	14%
Other	11%
Corporate Travel	2%
Travel Agent	2%

Reservation Type	
Transportation	
No Reservation	49%
Reservation	51%
Toll-Free Number	30%
Other	47%
Computer/Internet	6%
Corporate Travel	2%
Travel Agent	-

Party Composition	
Avg. Party Size	2.1
One Adult	39%
MM/FF	8%
3+ Adults	4%
Couples	22%
Families	27%

Activities	
General Spending (Net)	32%
Dining	24%
Shopping	12%
Entertainment	15%
Outdoor Sports (Net)	8%
Adventure Sports	2%
Hunt/Fish	2%
Golf	1%
Boat/Sail	1%
Snow Ski	3%
Nature (Net)	18%
Hike/Bike	6%
Camping	3%
National/State Parks	10%
Beach/Waterfront	1%
Eco-Travel	1%
Sightseeing (Net)	20%
Sightseeing	19%
Group Tour	1%
Attractions (Net)	21%
Theme Park	2%
Sporting Event	5%
Night Life	8%
Gamble	5%
Shows	1%
Culture (Net)	17%
Historic Site	6%
Concert/Play/Dance	7%
Museum/Art Exhibit	3%
Festival/Craft Fair	5%

Satisfaction with Destination	
Average (10 pt. scale)	7.0
8-10 Excellent	51%
4-7 Fair/Good	40%
1-3 Poor	9%

Value of Destination	
Average (10 pt. scale)	6.9
8-10 Excellent	50%
4-7 Fair/Good	40%
1-3 Poor	10%

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

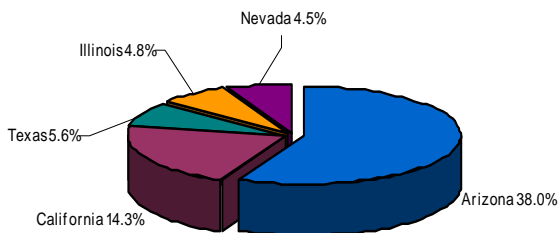


Total Domestic Overnight Business Visitor Profile

2004 Quick Facts: Visitor Profile	
Estimated Volume	6.2 Million
Average Length of Stay	3.3 days
Average Party Size	1.4
Spending Per Person Per Day	\$135.31
Total Direct Spending	\$3.63 Billion

Origin State	
Arizona	38.0%
California	14.3%
Texas	5.6%
Illinois	4.8%
Nevada	4.5%

Top 5 Origin States



Domestic overnight business person-trips in Arizona increased slightly in 2004.

Domestic overnight business travelers in Arizona spent the most per person per day, although this spending level declined slightly from \$136 in 2003 to \$135 in 2004.

Both regional markets and longer haul markets were sources for domestic overnight business travelers to Arizona in 2004 generating 6.2 million visitors.

The majority of

expenditures for the business traveler to Arizona in 2004 were for transportation and room, accounting for 66 percent of travel expenditures. A large share of business travel occurred during the first quarter of 2004 (31%), while a smaller share occurred during quarter four (19%).



Near the Superstition Mts., Central AZ

Origin DMA	
Phoenix	27.1%
Los Angeles	7.7%
Tucson (Sierra Vista)	7.6%
Las Vegas	4.4%
Chicago	4.1%

Demographics:

Household Income	
Average HH Income	\$72,400
<\$25,000	13%
\$25K-\$49,999	30%
\$50K-\$74,999	13%
\$75,000+	44%

Education	
No College	20%
Attended College	29%
College Degree	23%
Post-Grad. Degree	28%

Life Stage	
18-34/No children	16%
18-34/Children	9%
35-54/No children	24%
35-54/Children/<\$50K	13%
35-54/Children/\$50K+	15%
55+/No children/<\$50K	7%
55+/No children/\$50K+	16%

Age	
Average (years)	45
18-34 years	25%
35-54 years	52%
55+ years	23%

Occupation	
Manager, Prof.	46%
Tech., Sales, Admin.	17%
Service	2%
Other	19%
Retired	7%
Not Employed	10%

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



Total Domestic Overnight Business Visitor Profile

Trip Behaviors:

Accommodations	
Non-Paid (Net)	17%
Hotel	71%
Paid non/hotel	9%
Other	2%

Transportation	
Auto	43%
Air	44%
Other	13%

Length of Stay	
Average	3.3 nights
1-3 Nights	67%
4-7 Nights	25%
8+ Nights	7%

Quarter of Travel	
Quarter 1	31%
Quarter 2	26%
Quarter 3	23%
Quarter 4	19%

Trip Distance	
Average Distance (miles)	737
Under 100 Miles	4%
101-300 Miles	39%
301-500 Miles	13%
501-700 Miles	6%
701-1,000 Miles	7%
Over 1,000 Miles	32%

Expenditures	
Average (per person per day)	\$135.31
Transportation	33.0%
Room	32.8%
Food	17.7%
Shopping	6.4%
Entertainment	6.1%
Other	4.2%

Reservation Type	
Accommodation	
No Reservation	21%
Reservation	79%
Corporate Travel	17%
Computer/Internet	15%
Direct to Location	15%
Toll-Free Number	14%
Other	13%
Travel Agent	5%

Reservation Type	
Transportation	
No Reservation	28%
Reservation	72%
Corporate Travel	24%
Computer/Internet	22%
Toll-Free Number	17%
Other	7%
Travel Agent	1%

Party Composition	
Avg. Party Size	1.5
One Adult	70%
MM/FF	7%
3+ Adults	2%
Couples	14%
Families	7%

Activities	
General Spending (Net)	36%
Dining	31%
Shopping	12%
Entertainment	10%
Outdoor Sports (Net)	7%
Adventure Sports	2%
Hunt/Fish	-
Golf	3%
Boat/Sail	1%
Snow Ski	2%
Nature (Net)	14%
Hike/Bike	4%
Camping	2%
National/State Parks	7%
Beach/Waterfront	1%
Eco-Travel	4%
Sightseeing (Net)	18%
Sightseeing	11%
Group Tour	6%
Attractions (Net)	12%
Sporting Event	3%
Night Life	4%
Gamble	6%
Shows	3%
Culture (Net)	15%
Historic Site	6%
Concert/Play/Dance	4%
Museum/Art Exhibit	5%
Festival/Craft Fair	3%

Satisfaction with Destination	
Average (10 pt. scale)	7.1
8-10 Excellent	52%
4-7 Fair/Good	37%
1-3 Poor	11%

Value of Destination	
Average (10 pt. scale)	6.9
8-10 Excellent	50%
4-7 Fair/Good	42%
1-3 Poor	8%

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



Total Domestic Overnight Leisure Visitor Profile

2004 Quick Facts: Visitor Profile	
Estimated Volume	21.6 Million
Average Length of Stay	3.9 days
Average Party Size	2.3
Spending Per Person Per Day	\$97.40
Total Direct Spending	\$9.45 Billion

Origin State	
Arizona	31.2%
California	28.5%
Illinois	4.3%
New Mexico	3.7%
Texas	2.9%

Arizona overnight leisure travel remained relatively the same in 2004. Arizona fell behind the U.S. market in terms of volume increase in leisure travel. The US leisure travel market increased 4.4 percent in 2004.

Domestic overnight leisure travelers spent an average of \$97 per person per day in Arizona in 2004, decreasing from \$98 per person per day in 2003. This segment had a larger average travel party size, 2.3 persons, in comparison to Arizona's total domestic overnight visitor, 2.1 persons.

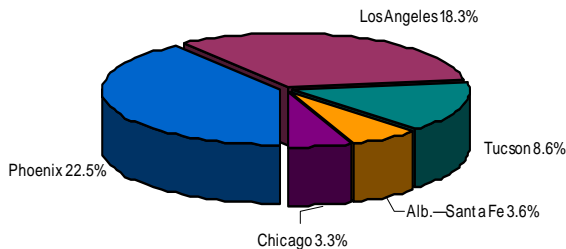
The average length of stay increased to 3.9 nights, due to the

increase percent of people staying 4 nights or more in Arizona. This increase in the length of stay contributed to the increase in direct spending, up from \$8.79 Billion in 2003 to \$9.45 Billion in 2004.



Central Arizona

Top 5 Origin DMA's



Origin DMA	
Phoenix	22.5%
Los Angeles	18.3%
Tucson	8.6%
Albuquerque—Santa Fe	3.6%
San Diego	3.4%

Demographics:

Household Income	
Average HH Income	\$72,800
<\$25,000	9%
\$25K-\$49,999	22%
\$50K-\$74,999	26%
\$75,000+	43%

Education	
No College	23%
Attended College	40%
College Degree	20%
Post-Grad. Degree	18%

Life Stage	
18-34/No children	11%
18-34/Children	21%
35-54/No children	19%
35-54/Children/<\$50K	5%
35-54/Children/\$50K+	15%
55+/No children/<\$50K	8%
55+/No children/\$50K+	19%

Age	
Average (years)	46
18-34 years	32%
35-54 years	40%
55+ years	28%

Occupation	
Manager, Prof.	36%
Tech., Sales, Admin.	22%
Service	4%
Other	10%
Retired	13%
Not Employed	14%

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



Total Domestic Overnight Leisure Visitor Profile

Trip Behaviors:

Accommodations	
Non-Paid (Net)	48%
Hotel	41%
Paid non/hotel	8%
Other	3%

Transportation	
Auto	63%
Air	26%
Other	11%

Length of Stay	
Average	3.9 nights
1-3 Nights	62%
4-7 Nights	27%
8+ Nights	11%

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

Trip Distance	
Average Distance (miles)	713
Under 100 Miles	4%
101-300 Miles	32%
301-500 Miles	19%
501-700 Miles	11%
701-1,000 Miles	4%
Over 1,000 Miles	30%

Expenditures	
Average (per person per day)	\$97.40
Transportation	31.8%
Food	22.6%
Shopping	15.9%
Entertainment	12.5%
Room	10.3%
Other	7.0%

Reservation Type	
Accommodation	
No Reservation	37%
Reservation	63%
Computer/Internet	17%
Direct to Location	14%
Toll-Free Number	14%
Other	13%
Travel Agent	5%
Corporate Travel	-

Reservation Type	
Transportation	
No Reservation	39%
Reservation	61%
Computer/Internet	29%
Toll-Free Number	19%
Other	12%
Travel Agent	2%
Corporate Travel	1%

Party Composition	
Avg. Party Size	2.3
One Adult	27%
MM/FF	6%
3+ Adults	7%
Couples	34%
Families	25%

Activities	
General Spending (Net)	43%
Dining	32%
Shopping	25%
Entertainment	23%
Outdoor Sports (Net)	14%
Adventure Sports	4%
Hunt/Fish	3%
Golf	5%
Boat/Sail	3%
Snow Ski	1%
Nature (Net)	32%
Hike/Bike	7%
Camping	5%
National/State Parks	20%
Beach/Waterfront	3%
Eco-Travel	5%
Sightseeing (Net)	38%
Sightseeing	37%
Group Tour	4%
Attractions (Net)	19%
Theme Park	1%
Sporting Event	7%
Night Life	7%
Gamble	6%
Shows	2%
Culture (Net)	18%
Historic Site	10%
Concert/Play/Dance	3%
Museum/Art Exhibit	4%
Festival/Craft Fair	5%

Satisfaction with Destination	
Average (10 pt. scale)	7.4
8-10 Excellent	64%
4-7 Fair/Good	32%
1-3 Poor	4%

Value of Destination	
Average (10 pt. scale)	7.5
8-10 Excellent	59%
4-7 Fair/Good	37%
1-3 Poor	4%

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



Total Domestic Overnight Resident Leisure Visitor Profile

2004 Quick Facts: Visitor Profile	
Estimated Volume	6.7 Million
Average Length of Stay	2.0 days
Average Party Size	2.5
Spending Per Person Per Day	\$79.09
Total Direct Spending	\$1.41 Billion

Arizona's domestic overnight resident leisure travel increased 10.2 percent in 2004, to 6.7 million person-trips. Total direct spending by residents decreased 5.5 percent from \$1.49 Billion in 2003 to \$1.41 Billion in 2004.

Length of stay increased slightly, the average length of stay among residents was 2.01 nights and the average party size was 2.5 people.

Residents traveled in Arizona to visit friends and relatives (37%) and for getaway weekends (21%). The number of residents traveling for special events increased

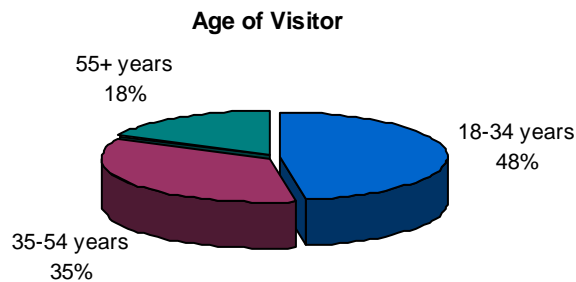
from 15 percent in 2003 to 23 percent in 2004.

Overnight resident leisure travelers are younger compared to non-resident travelers, with 48 percent of resident travelers falling between 18 and 34 years of age. Resident leisure travelers were most likely to travel with family (37%) or as a couple (30%) in 2004.

Origin DMA	
Phoenix	72.2%
Tucson (Sierra Vista)	27.5%



Pipe Springs NM, Northern Arizona



Demographics:

Household Income	
Average HH Income	\$64,200
<\$25,000	12%
\$25K-\$49,999	24%
\$50K-\$74,999	33%
\$75,000+	31%

Education	
No College	16%
Attended College	39%
College Degree	18%
Post-Grad. Degree	27%

Life Stage	
18-34/No children	17%
18-34/Children	31%
35-54/No children	14%
35-54/Children/<\$50K	8%
35-54/Children/\$50K+	13%
55+/No children/<\$50K	5%
55+/No children/\$50K+	12%

Age	
Average (years)	41
18-34 years	48%
35-54 years	35%
55+ years	18%

Occupation	
Manager, Prof.	46%
Tech., Sales, Admin.	20%
Service	2%
Other	5%
Retired	9%
Not Employed	17%

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



Total Domestic Overnight Resident Leisure Visitor Profile

Trip Behaviors:

Accommodations	
Non-Paid (Net)	46%
Hotel	41%
Paid non/hotel	10%
Other	4%

Transportation	
Auto	90%
Air	—
Other	9%

Length of Stay	
Average	2.0 nights
1-3 Nights	88%
4-7 Nights	11%
8+ Nights	1%

Quarter of Travel	
Quarter 1	22%
Quarter 2	24%
Quarter 3	28%
Quarter 4	26%

Trip Distance	
Average Distance (miles)	188
Under 100 Miles	14%
101-300 Miles	82%
301-500 Miles	4%

Expenditures	
Average (per person per day)	\$79.09
Food	26.8%
Room	16.3%
Transportation	16.1%
Entertainment	14.3%
Shopping	14.1%
Other	12.3%

Reservation Type	
Accommodation	
No Reservation	38%
Reservation	62%
Computer/Internet	17%
Direct to Location	18%
Toll-Free Number	16%
Other	10%
Corporate Travel	—

Reservation Type	
Transportation	
No Reservation	41%
Reservation	59%
Toll-Free Number	34%
Other	17%
Computer/Internet	8%
Corporate Travel	-
Travel Agent	-

Party Composition	
Avg. Party Size	2.5
One Adult	20%
MM/FF	8%
3+ Adults	5%
Couples	30%
Families	37%

Activities	
General Spending (Net)	36%
Dining	26%
Shopping	14%
Entertainment	18%
Outdoor Sports (Net)	9%
Adventure Sports	2%
Boat/Sail	—
Hunt/Fish	3%
Golf	2%
Snow Ski	3%
Nature (Net)	21%
Hike/Bike	7%
Camping	3%
National/State Parks	12%
Beach/Waterfront	1%
Eco-Travel	1%
Sightseeing (Net)	24%
Sightseeing	23%
Group Tour	1%
Attractions (Net)	21%
Theme Park	3%
Sporting Event	6%
Night Life	9%
Gamble	4%
Culture (Net)	20%
Historic Site	7%
Concert/Play/Dance	7%
Museum/Art Exhibit	3%
Festival/Craft Fair	6%

Satisfaction with Destination	
Average (10 pt. scale)	7.2
8-10 Excellent	52%
4-7 Fair/Good	42%
1-3 Poor	6%

Value of Destination	
Average (10 pt. scale)	7.0
8-10 Excellent	47%
4-7 Fair/Good	45%
1-3 Poor	8%

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



Total Domestic Overnight Non-Resident Leisure Visitor

2004 Quick Facts: Visitor Profile	
Estimated Volume	14.9 Million
Average Length of Stay	4.7 days
Average Party Size	2.2
Spending Per Person Per Day	\$101.52
Total Direct Spending	\$8.04 Billion

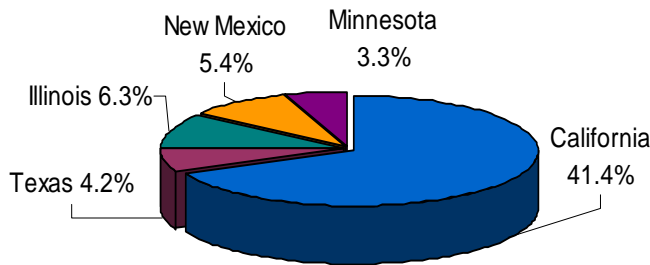
The majority of non-resident, domestic leisure travelers to Arizona in 2004 originated in regional states and cities; 41 percent of visitors came from California. Illinois contributed to 6.3 percent of Arizona's overnight leisure travel.

Total direct spending by non-resident leisure travelers to

Arizona increased 10.2 percent in 2004. This was largely due to a 17.8 percent increase in the length of stay to an average of 3.9 nights from 3.3 nights in 2003. In addition, the average party size increased 6.6 percent to an average of 2.2 people per travel party.

Half of the non-resident overnight leisure visitors arrived by auto, a reflection of regional visitation.

Top 5 Origin States



Origin State	
California	41.4%
Illinois	6.3%
New Mexico	5.4%
Texas	4.2%
Minnesota	3.3%

Origin DMA	
Los Angeles	26.6%
Albuquerque—Santa Fe	5.3%
San Diego	4.9%
Chicago	4.8%
New York	3.9%



Photo by Thomas Whetten
Madera Canyon Green Valley, AZ

Demographics:

Household Income	
Average HH Income	\$76,800
<\$25,000	8%
\$25K-\$49,999	21%
\$50K-\$74,999	23%
\$75,000+	48%

Education	
No College	26%
Attended College	40%
College Degree	21%
Post-Grad. Degree	13%

Life Stage	
18-34/No children	9%
18-34/Children	16%
35-54/No children	22%
35-54/Children/<\$50K	4%
35-54/Children/\$50K+	16%
55+/No children/<\$50K	10%
55+/No children/\$50K+	21%

Age	
Average (years)	48
18-34 years	25%
35-54 years	42%
55+ years	33%

Occupation	
Manager, Prof.	32%
Tech., Sales, Admin.	22%
Service	6%
Other	12%
Retired	15%
Not Employed	13%

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



Total Domestic Overnight Non-Resident Leisure Visitor

Trip Behaviors:

Accommodations	
Non-Paid (Net)	50%
Hotel	41%
Paid non/hotel	7%
Other	2%

Transportation	
Auto	51%
Air	37%
Other	12%

Length of Stay	
Average	4.7 nights
1-3 Nights	52%
4-7 Nights	34%
8+ Nights	14%

Quarter of Travel	
Quarter 1	30%
Quarter 2	24%
Quarter 3	21%
Quarter 4	24%

Trip Distance	
Average Distance (miles)	951
Under 100 Miles	-
101-300 Miles	9%
301-500 Miles	26%
501-700 Miles	15%
701-1,000 Miles	6%
Over 1,000 Miles	43%

Expenditures	
Average (per person per day)	\$101.52
Transportation	34.2%
Food	21.9%
Shopping	16.2%
Entertainment	12.2%
Room	9.3%
Other	6.2%

Reservation Type	
Accommodation	
No Reservation	37%
Reservation	63%
Computer/Internet	17%
Other	14%
Toll-Free Number	13%
Direct to Location	12%
Travel Agent	6%
Corporate Travel	1%

Reservation Type	
Transportation	
No Reservation	37%
Reservation	63%
Computer/Internet	38%
Toll-Free Number	12%
Other	9%
Travel Agent	2%
Corporate Travel	1%

Party Composition	
Avg. Party Size	2.3
One Adult	30%
MM/FF	5%
3+ Adults	8%
Couples	36%
Families	21%

Activities	
General Spending (Net)	46%
Dining	35%
Shopping	30%
Entertainment	25%
Outdoor Sports (Net)	16%
Adventure Sports	5%
Hunt/Fish	3%
Golf	6%
Boat/Sail	4%
Nature (Net)	37%
Hike/Bike	7%
Camping	6%
National/State Parks	24%
Beach/Waterfront	4%
Eco-Travel	7%
Sightseeing (Net)	44%
Sightseeing	43%
Group Tour	5%
Attractions (Net)	18%
Theme Park	0%
Sporting Event	7%
Night Life	6%
Gamble	7%
Shows	2%
Culture (Net)	18%
Historic Site	11%
Concert/Play/Dance	2%
Museum/Art Exhibit	5%
Festival/Craft Fair	4%

Satisfaction with Destination	
Average (10 pt. scale)	8.0
8-10 Excellent	70%
4-7 Fair/Good	28%
1-3 Poor	3%

Value of Destination	
Average (10 pt. scale)	7.8
8-10 Excellent	64%
4-7 Fair/Good	34%
1-3 Poor	2%

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.

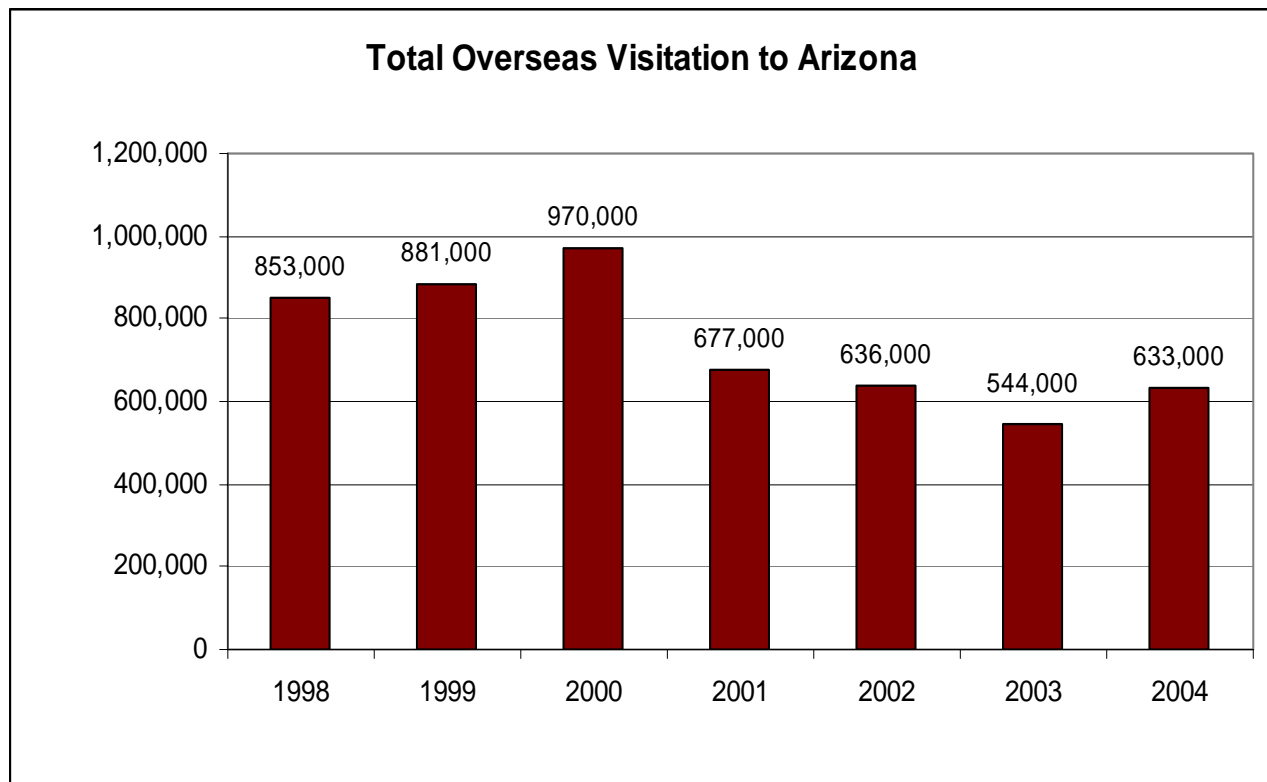
The questionnaire is designed to collect information on a traveler's complete trip itinerary, including information on every major destination visited, the length of stay and the type of accommodations utilized.

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 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 Overseas Visitation**	633,000

Age	
Male Average	46.0 years
Female Average	41.1 years

Gender	
Male	61.6%
Female	38.4%

Origin Markets	
U.K.	22.1%
France	10.6%
Germany	10.3%
Japan	10.0%
Netherlands	4.8%
Australia	4.4%
South Korea	4.1%
Italy	4.0%
Mexico	3.4%
South America	3.2%

Household Income	
Average HH Income	\$82,900
< \$40,000	23.6%
\$40,000 - \$79,999	35.3%
\$80,000 - \$119,999	18.6%
\$120,000+	22.6%

Party Composition	
Avg. Travel Party (mean)	1.6
Spouse	37.8%
Traveling Alone	32.3%
Family/Relatives	24.0%
Friends	14.5%
Business Associates	5.5%
Group Tour	3.1%
Adults Only	92.5%
Adults and Children	7.5%

Frequent Travelers	
Repeat Visitor to the U.S.	70.2%
U.S. Trips last 12 Months	1.8
U.S. Trips last 5 Years	5.2
1 Trip	37.0%
2 - 5 Trips	37.5%
6+ Trips	25.4%

Port of Entry	
Los Angeles	28.7%
Other	24.4%
San Francisco	13.4%
Chicago	9.7%
New York	3.6%
Atlanta	2.6%

Trip Behaviors:

Expenditures	
Avg. Spending Per Person Per Day	\$99

AZ Destinations Visited	
Grand Canyon NP	42.3%
Phoenix	33.9%
Tucson	8.9%
Glen Canyon NP	4.9%

Advance Trip Planning	
Advance Trip Decision	104.5 days
Advance Air Reservations	74.5 days
Use of Pre-Booked Lodging	65.7%

Accommodations	
Hotel/Motel	77.6%
Private Home	15.1%
Other	9.2%

Use of Packages	
YES	25.0%
Air/Lodging	15.7%
Guided Tour	15.2%
Air/Lodging/Tour	8.7%
Air/Rental Car	7.6%
Air/Lodging/Rental Car	6.9%
Air/Lodging/Bus	5.4%
Air/Lodging/Bus/Tour	5.2%
Advance Package Booking	111.3 days
# of Nights Pre-paid as Part of a Package	11.6 nights

Length of Stay	
# of Nights in Arizona (mean)	4.7
# of Nights in U.S. (mean)	19.6

Information Sources	
Travel Agency	47.2%
Personal Computer	37.7%
Friends/Relatives	20.9%
Travel Guides	16.4%
Airlines Directly	15.3%
Tour Company	10.9%
State/City Travel Office	8.7%
Corporate Travel Dept.	5.5%
Other	5.0%
Newspapers/Magazines	4.6%

Transportation in U.S.	
Airlines in U.S.	49.1%
Rented Auto	47.1%
Taxi/Cab/Limousine	31.2%
Company or Private Auto	28.5%
City Subway/Tram/Bus	19.0%
Bus between cities	7.9%

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

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



Total Overseas Air Visitors to Arizona Profile*

Purpose/Activities:

Purpose of Trip	
Leisure & VFR	78.9%
Leisure/Rec./Holidays	58.2%
Visit Friends/Relatives	19.9%
Other	0.8%
Business and Convention	21.1%
Business/Professional	15.5%
Convention/Conference	4.3%
Study/Teaching	1.3%



Jeep Tour, Sedona, AZ

In 2004, overseas visitation to Arizona increased 16.4 percent, from 544,000 in 2003 to 633,000. Average spending per person per day also increased, from \$84 in 2003 to \$99 in 2004. The average number of nights in Arizona decreased 1.2 nights to 4.7 nights. The average number of nights in the US also decreased, from 21.7 nights in 2003 to 19.6 nights in 2004.

Last year, Phoenix received the largest proportion of overseas visitors, however in 2004, the largest share of overseas visitors indicated they visited the Grand Canyon (42.3%), followed by Phoenix (33.9%) and Tucson (8.9%).

Other Destinations Visited	
# of States Visited	3.2
# of Destinations Visited	4.7
California	64.8%
San Francisco	41.7%
Los Angeles	41.0%
San Diego	12.1%
Yosemite N.P.	12.8%
Nevada	58.9%
Las Vegas	56.7%
Utah	22.5%
Bryce Canyon N.P.	12.4%
New York	10.7%
Colorado	7.5%
Florida	6.9%
Texas	5.7%

Overseas visitors to Arizona continued to use Los Angeles, San Francisco and Chicago as their main ports of entry. Large percentages of overseas visitors to Arizona also visited California (59.4%) and Nevada (51.6%) as well as Utah (22.7%), indicating visitors to the southwest tended to remain in the region during their US visit.

Use of a travel agent continues to be the most popular information source utilized. However, year after year the use of personal computer continues to increase and is the second most popular information source.

Leisure Activities	
Dining in Restaurants	88.6%
Shopping	87.5%
Visit National Parks	67.3%
Sightseeing in Cities	60.9%
Visit Historical Places	57.5%
Touring Countryside	46.6%
Visit Small Towns	46.6%
Casinos/Gambling	45.2%
Amusement/Theme Parks	37.9%
Cultural Heritage Sites	36.0%
Guided Tours	29.6%
Visit Native Am. Comm.	27.5%
Art Gallery/Museum	21.0%
Water Sports/Sunbathing	18.0%
Camping/Hiking	16.0%
Ethnic Heritage Sites	14.9%
Concert/Play/Musical	14.4%
Nightclubs/Dancing	9.0%
Environ./Eco Excursions	7.7%
Golfing/Tennis	6.2%
Attend Sports Event	5.4%
Cruises	5.3%
Ranch Vacations	3.6%
Hunting/Fishing	0.8%
Snow Skiing	0.4%

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 Overseas Visitation	175,000

Purpose of Trip	
Leisure & VFR	57.8%
Leisure/Rec./Holidays	31.8%
Visit Friends/Relatives	25.2%
Other	0.8%
Business and Convention	42.2%
Business/Professional	32.8%
Convention/Conference	7.0%
Study/Teaching	2.4%

Other Destinations Visited	
# of States Visited	2.4
# of Destinations Visited	3.3
California	45.6%
Los Angeles	19.5%
San Francisco	27.3%
San Diego	5.7%
Yosemite N.P.	1.4%
Nevada	28.4%
Las Vegas	28.1%
Utah	4.1%
Bryce Canyon N.P.	2.6%
Florida	12.8%
New York	7.8%
Texas	3.2%

Leisure Activities	
Shopping	89.4%
Dining in Restaurants	87.5%
Sightseeing in Cities	39.3%
Visit National Parks	37.0%
Visit Historical Places	34.0%
Visit Small Towns	33.9%
Casinos/Gambling	33.4%
Touring Countryside	33.2%
Amusement/Theme Parks	28.7%
Cultural Heritage Sites	27.9%
Art Gallery/Museum	18.4%
Guided Tours	15.1%
Visit Native Am. Comm.	14.3%
Golfing/Tennis	13.6%
Water Sports/Sunbathing	12.2%
Concert/Play/Musical	11.9%
Nightclubs/Dancing	11.4%
Attend Sports Event	8.7%
Camping/Hiking	6.9%
Environ./Eco Excursions	5.2%
Ethnic Heritage Sites	4.9%
Cruises	4.3%
Ranch Vacations	1.9%
Hunting/Fishing	0.6%
Snow Skiing	0.4%



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 to Phoenix Profile*

Demographics:

Age	
Male Average	42.8 years
Female Average	42.9 years

Gender	
Male	72.9%
Female	27.1%

Origin Markets	
U.K.	15.0%
Japan	11.2%
Mexico	10.3%
South Korea	7.6%
Germany	6.5%
France	5.5%
Australia	4.9%
Netherlands	4.8%
South America	4.4%
Italy	3.5%

Household Income	
Average HH Income	\$86,400
< \$40,000	24.0%
\$40,000 - \$79,999	28.8%
\$80,000 - \$119,999	20.4%
\$120,000+	26.8%

Frequent Travelers	
Repeat Visitor to the U.S.	80.7%
U.S. Trips last 12 Months	2.4
U.S. Trips last 5 Years	7.8
1 Trip	22.1%
2 - 5 Trips	30.4%
6+ Trips	47.5%

Party Composition	
Avg. Travel Party (mean)	1.4
Traveling Alone	50.5%
Spouse	22.7%
Family/Relatives	18.1%
Business Associates	11.0%
Friends	6.6%
Group Tour	0.3%
Adults Only	96.5%
Adults and Children	3.5%

Port of Entry	
Other	30.6%
Los Angeles	27.0%
Chicago	10.9%
San Francisco	10.9%
New York	3.9%
Cincinnati	3.4%

Trip Behaviors:

Expenditures		
Avg. Spending Per Person Per Day		\$123

AZ Destinations Visited	
Tucson	4.2%
Grand Canyon NP	9.0%
Glen Canyon NP	0.4%

Advance Trip Planning	
Advance Trip Decision	65.9 days
Advance Air Reservations	40.5 days
Use of Pre-Booked Lodging	61.4%

Use of Packages	
YES	10.5%
Air/Lodging	8.3%
Guided Tour	5.5%
Air/Rental Car	4.7%
Air/Lodging/Rental Car	4.1%
Air/Lodging/Tour	4.0%
Air/Lodging/Bus	1.9%
Air/Lodging/Bus/Tour	1.9%
Advance Package Booking	77.1 days
# of Nights Pre-paid as Part of a Package	10.5 nights

Accommodations	
Hotel/Motel	75.1%
Private Home	24.0%
Other	2.1%

Length of Stay	
# of Nights in Arizona (mean)	7.3
# of Nights in U.S. (mean)	16.8

Information Sources	
Travel Agency	50.7%
Personal Computer	29.4%
Airlines Directly	19.4%
Corporate Travel Dept.	12.3%
Friends/Relatives	12.2%
Travel Guides	8.6%
State/City Travel Office	5.3%
Newspapers/Magazines	3.8%
Tour Company	2.6%
Other	1.7%

Transportation in U.S.	
Airlines in U.S.	60.3%
Rented Auto	43.0%
Taxi/Cab/Limousine	39.9%
Company or Private Auto	38.0%
City Subway/Tram/Bus	12.5%

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

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

Total Overseas Air Visitors to Tucson Profile*

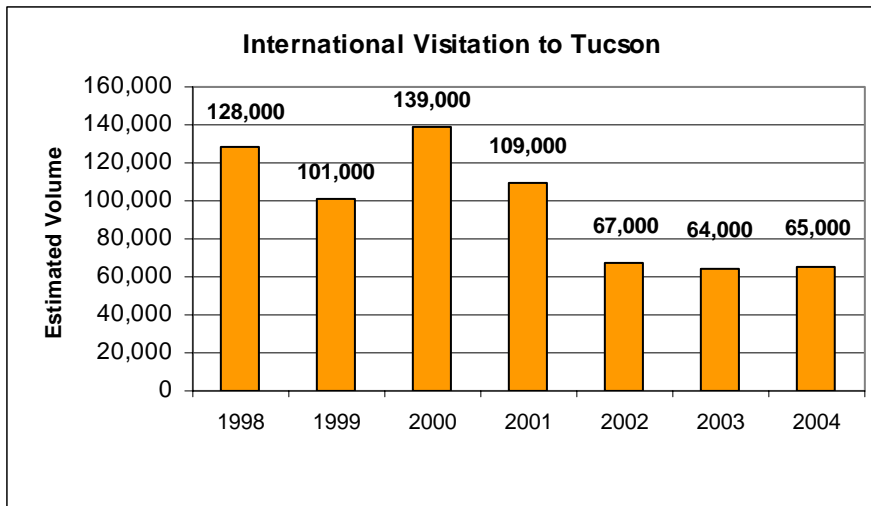
Purpose/Activities:

Visitation Volume	
Total Overseas Visitation	65,000

Purpose of Trip	
Leisure & VFR	59.7%
Leisure/Rec./Holidays	25.0%
Visit Friends/Relatives	34.6%
Other	0.1%
Business and Convention	40.3%
Business/Professional	30.9%
Convention/Conference	8.4%
Study/Teaching	1.0%

Other Destinations Visited	
# of States Visited	2.2
# of Destinations Visited	3.3
California	33.4%
Los Angeles	20.8%
San Francisco	11.6%
San Diego	10.3%
Nevada	11.7%
Las Vegas	11.7%
New York	9.7%
Florida	8.7%
Texas	7.5%
Colorado	4.8%
New Jersey	3.8%

Leisure Activities	
Dining in Restaurants	88.8%
Shopping	86.7%
Visit Historical Places	41.4%
Visit Small Towns	38.8%
Touring Countryside	34.4%
Sightseeing in Cities	34.2%
Visit National Parks	32.5%
Cultural Heritage Sites	29.5%
Casinos/Gambling	25.7%
Art Gallery/Museum	19.2%
Amusement/Theme Parks	17.2%
Visit Native Am. Comm.	14.5%
Concert/Play/Musical	13.0%
Camping/Hiking	11.9%
Water Sports/Sunbathing	9.0%
Golfing/Tennis	8.3%
Attend Sports Event	6.5%
Ethnic Heritage Sites	6.2%
Guided Tours	5.6%
Nightclubs/Dancing	5.6%
Environ./Eco Excursions	4.6%
Ranch Vacations	4.0%
Cruises	2.0%
Hunting/Fishing	1.2%
Snow Skiing	0.8%



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:

Age	
Male Average	46.1 years
Female Average	45.9 years

Gender	
Male	64.4%
Female	35.6%

Origin Markets	
Germany	14.2%
UK	12.4%
Mexico	11.7%
Japan	8.1%
South America	7.4%
France	6.5%
India	5.3%
Australia	5.2%
Netherlands	3.7%
Italy	1.6%

Household Income	
Average HH Income	\$67,700
< \$40,000	29.6%
\$40,000 - \$79,999	42.2%
\$80,000 - \$119,999	16.8%
\$120,000+	11.3%

Frequent Travelers	
Repeat Visitor to the U.S.	85.7%
U.S. Trips last 12 Months	2.5
U.S. Trips last 5 Years	9.4
1 Trip	17.5%
2 - 5 Trips	37.7%
6+ Trips	44.8%

Party Composition	
Avg. Travel Party (mean)	1.3
Traveling Alone	58.2%
Spouse	21.1%
Family/Relatives	15.2%
Friends	9.3%
Business Associates	9.1%
Group Tour	0.2%
Adults Only	94.5%
Adults and Children	5.5%

Port of Entry	
Los Angeles	23.8%
Other	23.7%
Dallas/Ft. Worth	10.9%
San Francisco	6.8%
Atlanta	6.6%
Washington DC	6.1%
Chicago	5.7%

Trip Behaviors:

Expenditures	
Avg. Spending Per Person Per Day	\$103

AZ Destinations Visited	
Phoenix	22.5%
Grand Canyon NP	6.8%
Glen Canyon NP	1.0%

Advance Trip Planning	
Advance Trip Decision	75.4 days
Advance Air Reservations	42.2 days
Use of Pre-Booked Lodging	52.5%

Use of Packages	
YES	1.8%
Air/Lodging	1.8%
Air/Rental Car	1.5%
Air/Lodging/Rental Car	1.5%

Accommodations	
Hotel/Motel	62.5%
Private Home	36.8%
Other	1.7%

Length of Stay	
# of Nights in Arizona (mean)	8.2
# of Nights in U.S. (mean)	19.7

Information Sources	
Travel Agency	50.7%
Personal Computer	33.2%
Friends/Relatives	16.0%
Airlines Directly	14.0%
State/City Travel Office	9.4%
Corporate Travel Dept.	7.8%
Travel Guides	7.5%
Other	6.9%
Newspapers/Magazines	2.4%
Tour Company	1.2%

Transportation in U.S.	
Rented Auto	48.6%
Airlines in U.S.	43.9%
Company or Private Auto	35.7%
Taxi/Cab/Limousine	24.2%
City Subway/Tram/Bus	14.2%

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

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

Total Overseas Air Visitors to Grand Canyon Profile*



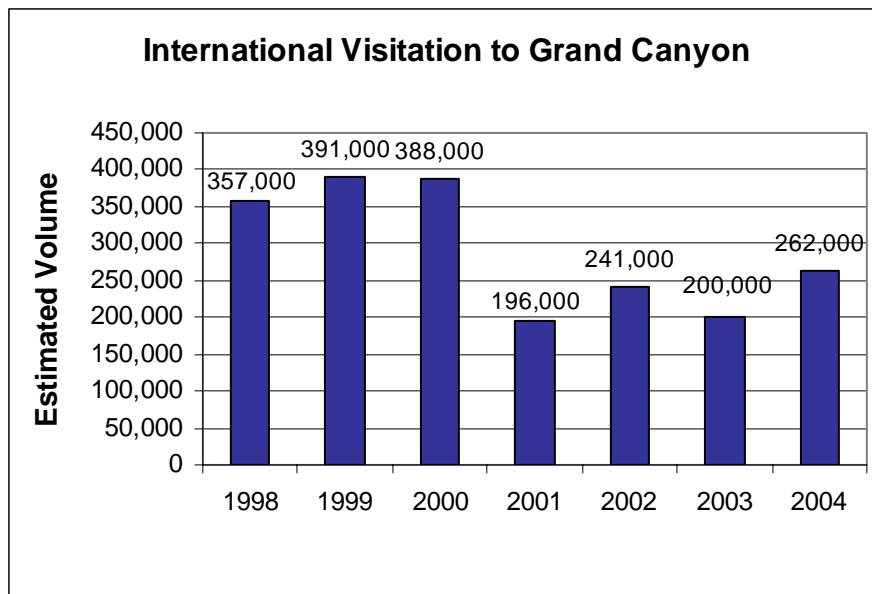
Purpose/Activities:

Visitation Volume	
Total Overseas Visitation	262,000

Purpose of Trip	
Leisure & VFR	96.4%
Leisure/Rec./Holidays	78.7%
Visit Friends/Relatives	17.5%
Other	0.2%
Business and Convention	3.6%
Business/Professional	0.9%
Convention/Conference	2.0%
Study/Teaching	0.7%

Other Destinations Visited	
# of States Visited	3.7
# of Destinations Visited	5.8
California	82.3%
San Francisco	59.8%
Los Angeles	57.6%
Yosemite N.P.	27.1%
San Diego	15.7%
Nevada	84.2%
Las Vegas	83.9%
Utah	40.5%
Bryce Canyon N.P.	25.6%
Zion	9.3%
Monument Valley	9.0%
New York	11.6%
Colorado	8.5%
Texas	6.5%
New Mexico	4.7%

Leisure Activities	
Visit National Parks	90.8%
Shopping	88.6%
Dining in Restaurants	88.0%
Sightseeing in Cities	75.2%
Visit Historical Places	68.8%
Casinos/Gambling	56.6%
Visit Small Towns	53.7%
Touring Countryside	51.8%
Amusement/Theme Parks	43.7%
Cultural Heritage Sites	41.2%
Guided Tours	39.2%
Visit Native Am. Comm.	31.2%
Camping/Hiking	25.7%
Art Gallery/Museum	23.6%
Water Sports/Sunbathing	20.8%
Ethnic Heritage Sites	15.7%
Concert/Play/Musical	12.9%
Environ./Eco Excursions	9.2%
Nightclubs/Dancing	7.0%
Cruises	6.6%
Golfing/Tennis	3.7%
Attend Sports Event	3.4%
Ranch Vacations	2.8%
Hunting/Fishing	1.0%
Snow Skiing	0.2%



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:

Age	
Male Average	46.7 years
Female Average	38.7 years

Gender	
Male	60.3%
Female	39.7%

Origin Markets	
France	17.0%
U.K.	16.9%
Japan	13.3%
Germany	8.3%
Netherlands	7.2%
Italy	5.9%
Oceania	5.4%
South Korea	4.4%

Household Income	
Average HH Income	\$86,500
< \$40,000	17.9%
\$40,000 - \$79,999	38.6%
\$80,000 - \$119,999	19.0%
\$120,000+	24.6%

Frequent Travelers	
Repeat Visitor to the U.S.	55.1%
U.S. Trips last 12 Months	1.2
U.S. Trips last 5 Years	2.7
1 Trip	55.0%
2 - 5 Trips	36.1%
6+ Trips	8.8%

Party Composition	
Avg. Travel Party (mean)	2.1
Spouse	55.8%
Family/Relatives	31.1%
Friends	19.8%
Traveling Alone	14.2%
Group Tour	5.1%
Business Associates	0.8%
Adults Only	87.5%
Adults and Children	12.5%

Port of Entry	
Los Angeles	29.4%
Other	22.0%
San Francisco	17.9%
Chicago	7.3%
Newark	4.0%
New York	3.4%

Trip Behaviors:

Expenditures	
Avg. Spending Per Person Per Day	\$87

AZ Destinations Visited	
Phoenix	6.9%
Tucson	1.1%
Glen Canyon NP	10.8%

Advance Trip Planning	
Advance Trip Decision	117.4 days
Advance Air Reservations	84.4 days
Use of Pre-Booked Lodging	68.8%

Use of Packages	
YES	35.0%
Air/Lodging	24.2%
Guided Tour	20.7%
Air/Lodging/Tour	13.2%
Air/Rental Car	13.0%
Air/Lodging/Rental Car	12.3%
Air/Lodging/Bus	7.9%
Air/Lodging/Bus/Tour	7.6%
Advance Package Booking	98 days
# of Nights Pre-paid as Part of a Package	10.5 nights

Accommodations	
Hotel/Motel	78.0%
Private Home	4.3%
Other	17.7%

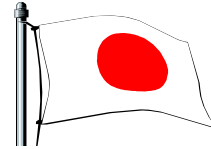
Length of Stay	
# of Nights in Arizona (mean)	1.8
# of Nights in U.S. (mean)	18.1

Information Sources	
Travel Agency	51.1%
Personal Computer	43.2%
Friends/Relatives	29.8%
Travel Guides	23.0%
Tour Company	13.2%
State/City Travel Office	9.6%
Airlines Directly	8.6%
Newspapers/Magazines	5.6%
Other	5.0%
Corporate Travel Dept.	0.9%

Transportation in U.S.	
Airlines in U.S.	53.9%
Rented Auto	52.7%
Taxi/Cab/Limousine	27.5%
City Subway/Tram/Bus	26.4%
Company or Private Auto	21.5%

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

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



Total Overseas Air Visitors From Japan Profile

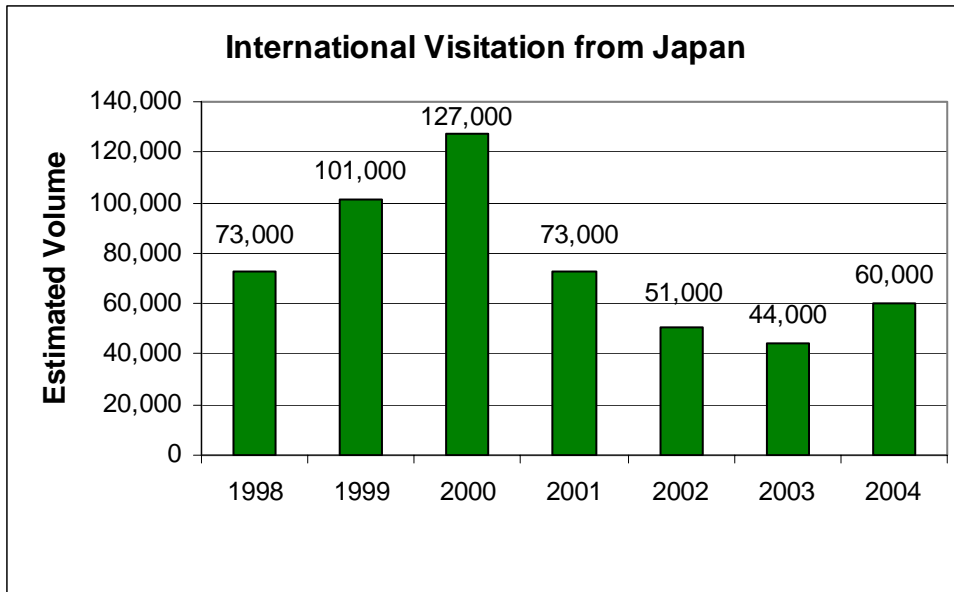
Purpose/Activities:

Visitation Volume	
Total Visitation from Japan	60,000

Purpose of Trip	
Leisure & VFR	65.0%
Leisure/Rec./Holidays	47.7%
Visit Friends/Relatives	15.9%
Other	1.4%
Business and Convention	35.0%
Business/Professional	26.9%
Convention/Conference	8.1%

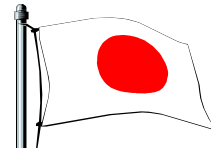
Other Destinations Visited	
# of States Visited	2.7
# of Destinations Visited	3.6
California	59.8%
Los Angeles	37.0%
San Francisco	31.5%
Yosemite N.P.	9.4%
San Diego	3.1%
Nevada	55.9%
Las Vegas	56.4%
Utah	13.1%
Monument Valley	9.8%
Illinois	7.8%
New York	7.4%
Texas	6.0%

Leisure Activities	
Shopping	87.1%
Dining in Restaurants	84.0%
Visit National Parks	63.0%
Sightseeing in Cities	49.8%
Guided Tours	38.6%
Casinos/Gambling	37.4%
Visit Small Towns	30.4%
Touring Countryside	24.8%
Visit Historical Places	23.4%
Cultural Heritage Sites	20.3%
Visit Native Am. Comm.	17.5%
Amusement/Theme Parks	17.0%
Golfing/Tennis	11.2%
Concert/Play/Musical	9.5%
Art Gallery/Museum	7.4%
Ethnic Heritage Sites	6.0%
Camping/Hiking	4.7%
Attend Sports Event	3.2%
Nightclubs/Dancing	2.9%
Cruises	1.7%
Ranch Vacations	1.4%
Environ./Eco Excursions	0.1%



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

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



Total Overseas Air Visitors From Japan Profile

Demographics:

Age	
Male Average	47.7 years
Female Average	48.6 years

Gender	
Male	64.9%
Female	35.1%

Port of Entry	
Los Angeles	43.5%
San Francisco	35.9%
Detroit	9.3%
Other Ports	6.2%
Seattle	2.3%
Honolulu	0.9%

Household Income	
Average HH Income	\$83,600
< \$40,000	20.7%
\$40,000 - \$79,999	33.1%
\$80,000 - \$119,999	24.1%
\$120,000+	22.1%

Frequent Travelers	
Repeat Visitor to the U.S.	71.2%
U.S. Trips last 12 Months	2.4
U.S. Trips last 5 Years	8
1 Trip	35.1%
2 - 5 Trips	32.3%
6+ Trips	32.6%

Party Composition	
Avg. Travel Party (mean)	1.6
Spouse	28.6%
Traveling Alone	31.6%
Family/Relatives	17.5%
Business Associates	14.6%
Friends	12.7%
Group Tour	7.6%
Adults Only	95.9%
Adults and Children	4.1%

Trip Behaviors:

Expenditures	
Avg. Spending Per Person Per Day	\$218

AZ Destinations Visited	
Grand Canyon NP	56.5%
Phoenix	34.2%
Tucson	6.2%
Glen Canyon NP	2.8%

Advance Trip Planning	
Advance Trip Decision	57.5 days
Advance Air Reservations	36.1 days
Use of Pre-Booked Lodging	77.3%

Use of Packages	
YES	34.0%
Air/Lodging	25.9%
Guided Tour	32.6%
Air/Lodging/Tour	24.5%
Air/Lodging/Bus	13.6%
Air/Lodging/Bus/Tour	13.0%
Air/Rental Car	0.7%
Air/Lodging/Rental Car	0.7%

Accommodations	
Hotel/Motel	91.3%
Private Home	8.7%
Other	0.7%

Length of Stay	
# of Nights in Arizona (mean)	3.4
# of Nights in U.S. (mean)	10.3

Information Sources	
Travel Agency	47.8%
Personal Computer	32.3%
Tour Company	19.3%
Travel Guides	18.7%
Friends/Relatives	13.8%
Corporate Travel Dept.	12.9%
Airlines Directly	12.4%
Newspapers/Magazines	11.2%
Other	3.0%
State/City Travel Office	1.2%

Transportation in U.S.	
Airlines in U.S.	61.1%
Rented Auto	37.3%
Company or Private Auto	35.3%
Taxi/Cab/Limousine	33.9%
City Subway/Tram/Bus	22.4%

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



Total Overseas Air Visitors From Germany Profile*

Purpose/Activities:

Visitation Volume	
Total Visitation from Germany	77,000

Purpose of Trip	
Leisure & VFR	81.9%
Leisure/Rec./Holidays	62.8%
Visit Friends/Relatives	19.1%
Other	-
Business and Convention	18.2%
Business/Professional	14.1%
Study/Teaching	3.2%
Convention/Conference	0.9%

Other Destinations Visited	
# of States Visited	3.2
# of Destinations Visited	4.9
California	59.7%
Los Angeles	45.3%
San Francisco	42.0%
San Diego	10.8%
Yosemite N.P.	8.6%
Nevada	63.1%
Las Vegas	63.0%
Utah	33.3%
Bryce Canyon N.P.	12.2%
New Mexico	9.2%
New York	9.1%
Colorado	7.0%
Florida	6.3%
Texas	5.8%
Washington, DC	5.1%

Leisure Activities	
Dining in Restaurants	86.0%
Shopping	82.0%
Visit National Parks	73.6%
Visit Historical Places	61.7%
Touring Countryside	54.2%
Visit Small Towns	50.1%
Cultural Heritage Sites	48.2%
Amusement/Theme Parks	47.8%
Sightseeing in Cities	42.5%
Casinos/Gambling	35.0%
Visit Native Am. Comm.	33.2%
Camping/Hiking	24.6%
Guided Tours	23.1%
Water Sports/Sunbathing	21.7%
Art Gallery/Museum	20.2%
Concert/Play/Musical	19.5%
Nightclubs/Dancing	10.9%
Attend Sports Event	9.5%
Golfing/Tennis	7.5%
Ethnic Heritage Sites	6.0%
Environ./Eco Excursions	2.9%
Cruises	2.4%
Hunting/Fishing	1.3%
Ranch Vacations	1.1%
Snow Skiing	1.1%



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

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

*Data sample was aggregated from years 2003-2004.



Total Overseas Air Visitors From Germany Profile*

Demographics:

Age	
Male Average	43.8 years
Female Average	39.8 years

Gender	
Male	63.6%
Female	36.4%

Port of Entry	
Los Angeles	24.4%
Other Ports	23.9%
Chicago	15.9%
San Francisco	11.5%
Atlanta	8.7%
Washington DC	2.8%
Cincinnati	2.6%

Household Income	
Average HH Income	\$83,800
< \$40,000	17.5%
\$40,000 - \$79,999	38.6%
\$80,000 - \$119,999	25.8%
\$120,000+	18.2%

Frequent Travelers	
Repeat Visitor to the U.S.	71.3%
U.S. Trips last 12 Months	1.7
U.S. Trips last 5 Years	5.5
1 Trip	35.7%
2 - 5 Trips	39.6%
6+ Trips	24.8%

Party Composition	
Avg. Travel Party (mean)	1.6
Traveling Alone	36.5%
Spouse	27.8%
Family/Relatives	27.3%
Friends	18.3%
Business Associates	3.7%
Group Tour	1.2%
Adults Only	93.6%
Adults and Children	6.4%

Trip Behaviors:

Expenditures	
Avg. Spending Per Person Per Day	\$66

AZ Destinations Visited	
Phoenix	37.0%
Grand Canyon NP	36.4%
Tucson	12.0%
Glen Canyon NP	2.3%

Advance Trip Planning	
Advance Trip Decision	130.9 days
Advance Air Reservations	87.8 days
Use of Pre-Booked Lodging	59.2%

Use of Packages	
YES	12.3%
Air/Lodging	7.7%
Guided Tour	7.4%
Air/Lodging/Tour	5.5%
Air/Lodging/Bus	3.0%
Air/Lodging/Bus/Tour	3.0%
Air/Rental Car	1.5%
Air/Lodging/Rental Car	1.1%

Accommodations	
Hotel/Motel	65.9%
Private Home	25.8%
Other	12.5%

Length of Stay	
# of Nights in Arizona (mean)	6.7
# of Nights in U.S. (mean)	29.1

Information Sources	
Personal Computer	45.1%
State/City Travel Office	36.3%
Travel Guides	30.5%
Travel Agency	30.0%
Friends/Relatives	25.2%
Airlines Directly	22.1%
Other	16.4%
Tour Company	11.1%
Corporate Travel Dept.	8.7%
Newspapers/Magazines	5.2%

Transportation in U.S.	
Rented Auto	57.5%
Company or Private Auto	33.3%
Airlines in U.S.	26.1%
Taxi/Cab/Limousine	20.9%
City Subway/Tram/Bus	16.0%

*Data sample was aggregated from years 2003-2004.

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



Total Overseas Air Visitors From UK Profile*

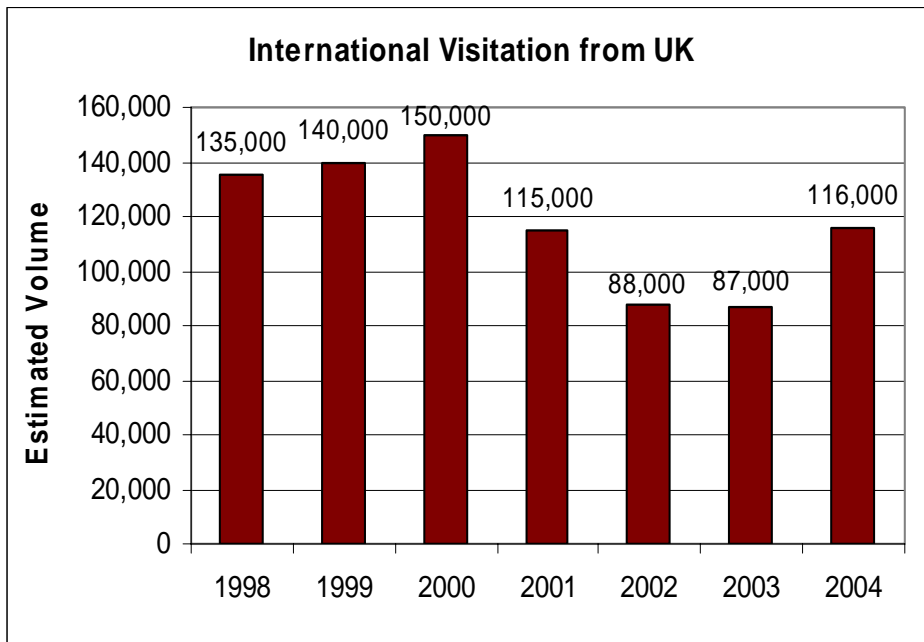
Purpose/Activities:

Visitation Volume	
Total Visitation from U.K.	116,000

Purpose of Trip	
Leisure & VFR	87.2%
Leisure/Rec./Holidays	76.5%
Visit Friends/Relatives	10.4%
Other	0.3%
Business and Convention	12.8%
Business/Professional	8.8%
Convention/Conference	3.5%
Study/Teaching	0.5%

Other Destinations Visited	
# of States Visited	3.5
# of Destinations Visited	5.4
California	68.1%
Los Angeles	39.0%
San Francisco	40.8%
San Diego	14.9%
Yosemite N.P.	7.7%
Nevada	65.7%
Las Vegas	64.6%
Utah	20.0%
Bryce Canyon N.P.	5.3%
Zion	7.1%
New York	14.2%
Colorado	12.9%
New Mexico	11.2%
Illinois	8.8%
Texas	7.7%

Leisure Activities	
Dining in Restaurants	95.0%
Shopping	87.3%
Visit National Parks	79.7%
Touring Countryside	73.7%
Sightseeing in Cities	67.8%
Visit Historical Places	67.2%
Visit Small Towns	59.5%
Cultural Heritage Sites	54.2%
Casinos/Gambling	52.8%
Guided Tours	38.8%
Amusement/Theme Parks	37.9%
Visit Native Am. Comm.	35.9%
Ethnic Heritage Sites	32.5%
Water Sports/Sunbathing	30.7%
Art Gallery/Museum	28.3%
Concert/Play/Musical	16.3%
Camping/Hiking	15.9%
Environ./Eco Excursions	13.5%
Nightclubs/Dancing	11.2%
Cruises	9.5%
Ranch Vacations	7.5%
Golfing/Tennis	7.3%
Attend Sports Event	6.6%
Snow Skiing	0.8%
Hunting/Fishing	0.4%



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

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

*Data sample was aggregated from years 2003-2004.



Total Overseas Air Visitors From UK Profile*

Demographics:

Age	
Male Average	49.2 years
Female Average	43.3 years

Gender	
Male	59.4%
Female	40.6%

Port of Entry	
Los Angeles	26.1%
Other	24.1%
Chicago	18.3%
San Francisco	11.6%
Newark	5.5%
New York	3.8%
Atlanta	3.6%

Household Income	
Average HH Income	\$90,500
< \$40,000	22.4%
\$40,000 - \$79,999	33.6%
\$80,000 - \$119,999	16.0%
\$120,000+	28.0%

Frequent Travelers	
Repeat Visitor to the U.S.	83.4%
U.S. Trips last 12 Months	1.9
U.S. Trips last 5 Years	6.2
1 Trip	25.6%
2 - 5 Trips	52.6%
6+ Trips	21.7%

Party Composition	
Avg. Travel Party (mean)	1.8
Spouse	55.8%
Family/Relatives	24.6%
Traveling Alone	20.6%
Friends	18.3%
Group Tour	2.2%
Business Associates	0.8%
Adults Only	90.4%
Adults and Children	9.6%

Trip Behaviors:

Expenditures	
Avg. Spending Per Person Per Day	\$102

AZ Destinations Visited	
Grand Canyon NP	40.0%
Phoenix	34.1%
Tucson	6.0%
Glen Canyon NP	1.7%

Advance Trip Planning	
Avg. Advance Trip Decision	140.5 days
Avg. Advance Air Reservations	99.1 days
Use of Pre-Booked Lodging	73.4%

Use of Packages	
YES	30.5%
Guided Tour	22.1%
Air/Lodging	13.4%
Air/Lodging/Tour	8.9%
Air/Rental Car	7.4%
Air/Lodging/Rental Car	4.7%
Air/Lodging/Bus	4.5%
Air/Lodging/Bus/Tour	4.5%

Accommodations	
Hotel/Motel	88.3%
Private Home	6.4%
Other	5.9%

Length of Stay	
# of Nights in Arizona (mean)	3.5
# of Nights in U.S. (mean)	18.3

Information Sources	
Personal Computer	47.8%
Travel Agency	36.7%
Tour Company	24.1%
Airlines Directly	16.8%
Travel Guides	16.5%
Friends/Relatives	15.2%
Newspapers/Magazines	4.3%
Other	4.3%
State/City Travel Office	3.7%
Corporate Travel Dept.	3.0%

Transportation in U.S.	
Rented Auto	52.4%
Airlines in U.S.	39.5%
Taxi/Cab/Limousine	33.9%
Company or Private Auto	24.6%
City Subway/Tram/Bus	23.5%

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

*Data sample was aggregated from years 2003-2004.



Total Overseas Visitors From Mexico Profile*

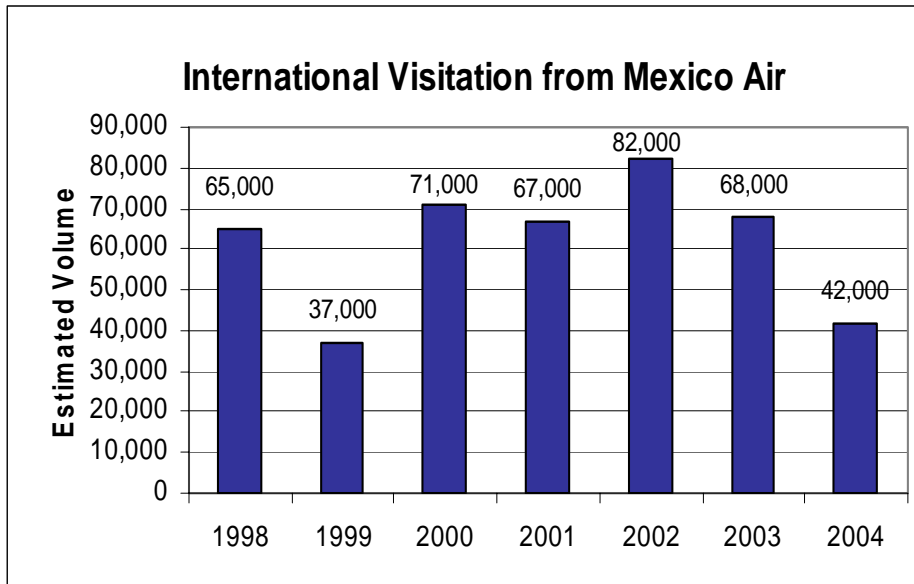
Purpose/Activities:

Visitation Volume	
Total Visitation from Mexico (Air Only)	42,000

Purpose of Trip	
Leisure & VFR	65.5%
Leisure/Rec./Holidays	14.2%
Visit Friends/Relatives	45.5%
Other	5.8%
Business and Convention	34.6%
Business/Professional	27.5%
Convention/Conference	5.6%
Study/Teaching	1.5%

Other Destinations Visited	
# of States Visited	1.4
# of Destinations Visited	1.6
California	12.1%
Los Angeles	5.3%
San Diego	3.3%
San Francisco	0.4%
Texas	7.9%
Nevada	4.1%
Las Vegas	4.1%

Leisure Activities	
Shopping	85.1%
Dining in Restaurants	74.1%
Visit Small Towns	30.6%
Visit National Parks	21.3%
Visit Historical Places	18.2%
Amusement/Theme Parks	16.3%
Sightseeing in Cities	11.5%
Casinos/Gambling	10.8%
Golfing/Tennis	9.3%
Camping/Hiking	8.6%
Touring Countryside	5.7%
Concert/Play/Musical	5.4%
Hunting/Fishing	5.1%
Visit Native Am. Comm.	4.9%
Art Gallery/Museum	4.8%
Water Sports/Sunbathing	4.6%
Attend Sports Event	4.3%
Cultural Heritage Sites	4.3%
Nightclubs/Dancing	3.8%
Guided Tours	3.4%
Snow Skiing	2.8%
Environ./Eco Excursions	2.2%
Ethnic Heritage Sites	2.0%
Ranch Vacations	1.3%



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 Visitors From Mexico Profile*

Demographics:

Age	
Male Average	38.9 years
Female Average	40.4 years

Gender	
Male	59.1%
Female	40.9%

Port of Entry	
Other	79.2%
Dallas/Ft. Worth	9.5%
Houston	6.2%
Los Angeles	5.1%

Household Income	
Average HH Income	\$75,300
< \$40,000	44.0%
\$40,000 - \$79,999	17.0%
\$80,000 - \$119,999	16.0%
\$120,000+	22.1%

Frequent Travelers	
Repeat Visitor to the U.S.	88.5%
U.S. Trips last 12 Months	4.3
U.S. Trips last 5 Years	14.3
1 Trip	12.9%
2 - 5 Trips	21.5%
6+ Trips	65.5%

Party Composition	
Avg. Travel Party (mean)	1.3
Traveling Alone	54.8%
Family/Relatives	26.4%
Spouse	12.4%
Friends	6.5%
Business Associates	3.4%
Group Tour	-
Adults Only	91.7%
Adults and Children	8.3%

Trip Behaviors:

Expenditures	
Avg. Spending Per Person Per Day	\$133**

AZ Destinations Visited	
Phoenix	71.8%
Tucson	17.9%
Grand Canyon NP	2.8%

Advance Trip Planning	
Avg. Advance Trip Decision	28.1 days
Avg. Advance Air Reservations	17.9 days
Use of Pre-Booked Lodging	43.1%

Use of Packages	
YES	1.1%
Air/Lodging	1.1%
Air/Rental Car	1.1%
Air/Lodging/Rental Car	1.1%

Accommodations	
Hotel/Motel	54.1%
Private Home	47.7%
Other	2.5%

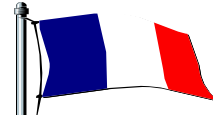
Length of Stay	
# of Nights in Arizona (mean)	7.5
# of Nights in U.S. (mean)	10.8

Information Sources	
Travel Agency	50.1%
Personal Computer	21.9%
Airlines Directly	18.3%
Friends/Relatives	13.6%
State/City Travel Office	7.9%
Other	3.2%
Corporate Travel Dept.	2.3%
Travel Guides	1.2%
Newspapers/Magazines	0.4%

Transportation in U.S.	
Company or Private Auto	48.1%
Rented Auto	24.6%
Taxi/Cab/Limousine	22.7%
Airlines in U.S.	16.1%
City Subway/Tram/Bus	5.4%

*Does not include visitors arriving by land from Mexico and data was aggregated from years 2003-2004. **Sample size is low N=73

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



Total Overseas Air Visitors From France Profile*

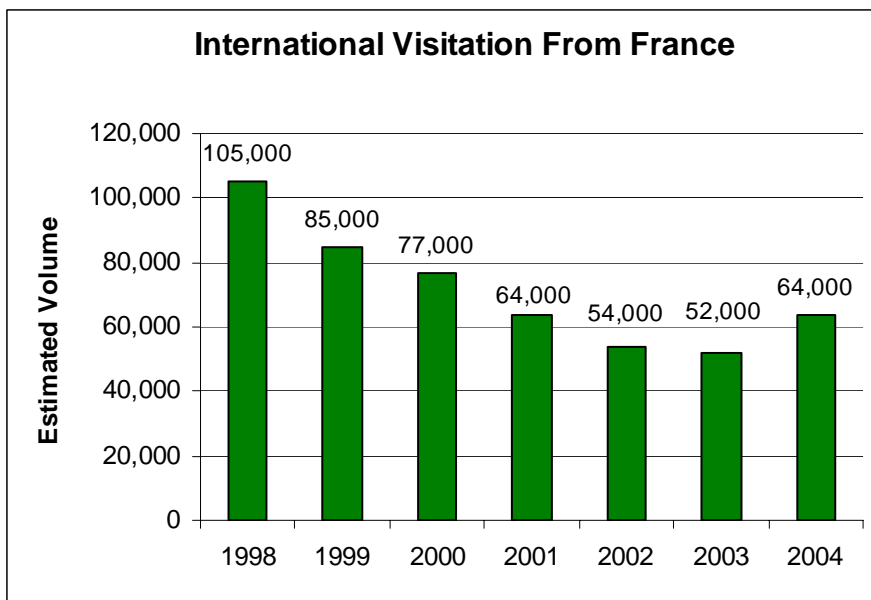
Purpose/Activities:

Visitation Volume	
Total Visitation from France	64,000

Purpose of Trip	
Leisure & VFR	89.0%
Leisure/Rec./Holidays	79.4%
Visit Friends/Relatives	9.6%
Other	-
Business and Convention	11.0%
Business/Professional	6.5%
Convention/Conference	4.1%
Study/Teaching	0.4%

Other Destinations Visited	
# of States Visited	3.5
# of Destinations Visited	5.5
California	80.5%
San Francisco	49.7%
Los Angeles	44.8%
Yosemite N.P.	25.8%
San Diego	12.1%
Nevada	62.9%
Las Vegas	61.8%
Utah	54.6%
Bryce Canyon N.P.	33.7%
New York	12.1%
Colorado	10.2%
New Mexico	9.0%
Florida	3.9%

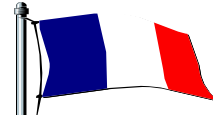
Leisure Activities	
Shopping	88.9%
Dining in Restaurants	82.7%
Sightseeing in Cities	79.8%
Visit National Parks	77.2%
Visit Historical Places	66.1%
Casinos/Gambling	60.2%
Visit Small Towns	55.1%
Amusement/Theme Parks	44.6%
Touring Countryside	42.7%
Cultural Heritage Sites	42.5%
Guided Tours	28.2%
Art Gallery/Museum	26.5%
Water Sports/Sunbathing	24.6%
Camping/Hiking	20.5%
Visit Native Am. Comm.	20.3%
Ethnic Heritage Sites	17.4%
Concert/Play/Musical	14.4%
Environ./Eco Excursions	13.6%
Nightclubs/Dancing	8.4%
Golfing/Tennis	7.4%
Ranch Vacations	5.7%
Cruises	5.1%
Hunting/Fishing	2.4%
Attend Sports Event	2.0%
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 2002-2004.



Total Overseas Air Visitors From France Profile*

Demographics:

Age	
Male Average	50.7 years
Female Average	41.6 years

Gender	
Male	66.2%
Female	33.8%

Port of Entry	
Los Angeles	26.1%
Other	19.3%
San Francisco	10.0%
Atlanta	8.9%
New York	6.9%
Newark	5.7%
Washington, DC	5.4%
Chicago	5.1%

Household Income	
Average HH Income	\$77,200
< \$40,000	28.0%
\$40,000 - \$79,999	32.9%
\$80,000 - \$119,999	22.8%
\$120,000+	16.3%

Frequent Travelers	
Repeat Visitor to the U.S.	66.8%
U.S. Trips last 12 Months	1.7
U.S. Trips last 5 Years	5.2
1 Trip	39.1%
2 - 5 Trips	40.2%
6+ Trips	20.7%

Party Composition	
Avg. Travel Party (mean)	2.2
Spouse	54.2%
Friends	28.8%
Family/Relatives	27.4%
Traveling Alone	15.1%
Group Tour	6.7%
Business Associates	2.2%
Adults Only	86.4%
Adults and Children	13.6%

Trip Behaviors:

Expenditures	
Avg. Spending Per Person Per Day	\$91

AZ Destinations Visited	
Grand Canyon NP	46.9%
Phoenix	25.1%
Glen Canyon NP	13.3%
Tucson	6.1%

Advance Trip Planning	
Advance Trip Decision	112.0 days
Advance Air Reservations	72.8 days
Use of Pre-Booked Lodging	51.7%

Use of Packages	
YES	32.9%
Air/Lodging	21.2%
Guided Tour	18.0%
Air/Rental Car	17.1%
Air/Lodging/Rental Car	14.8%
Air/Lodging/Tour	7.4%
Air/Lodging/Bus	4.5%
Air/Lodging/Bus/Tour	4.5%

Accommodations	
Hotel/Motel	80.8%
Private Home	14.2%
Other	9.4%

Length of Stay	
# of Nights in Arizona (mean)	3.9
# of Nights in U.S. (mean)	18.4

Information Sources	
Travel Agency	64.7%
Personal Computer	30.1%
Travel Guides	16.8%
Friends/Relatives	12.5%
Airlines Directly	11.7%
Tour Company	8.9%
Other	4.6%
Corporate Travel Dept.	3.5%
Newspapers/Magazines	3.2%
State/City Travel Office	1.4%

Transportation in U.S.	
Rented Auto	68.3%
Airlines in U.S.	34.1%
Taxi/Cab/Limousine	26.4%
Company or Private Auto	20.0%
City Subway/Tram/Bus	18.2%

*Data sample was aggregated from years 2002-2004.

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



Total Overseas Air Visitors From Australia Profile*

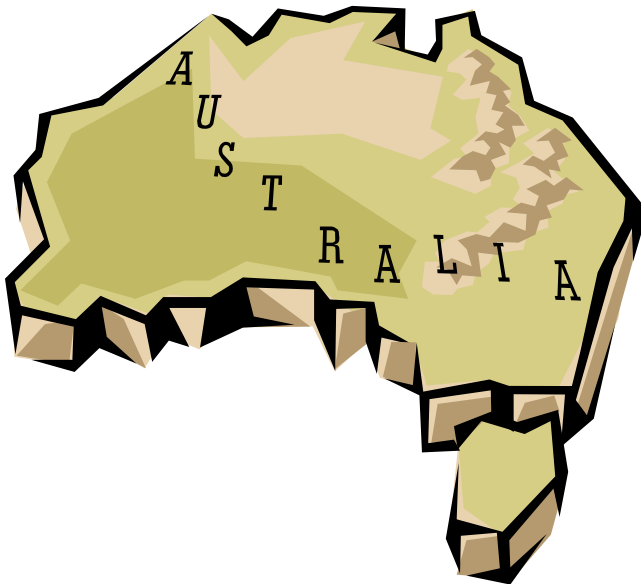
Purpose/Activities:

Visitation Volume	
Total Visitation from Australia	27,000

Purpose of Trip	
Leisure & VFR	75.1%
Leisure/Rec./Holidays	54.6%
Visit Friends/Relatives	18.6%
Other	1.9%
Business and Convention	24.9%
Business/Professional	15.3%
Convention/Conference	9.6%
Study/Teaching	-

Other Destinations Visited	
# of States Visited	3.5
# of Destinations Visited	4.6
California	71.3%
Los Angeles	50.5%
San Francisco	22.3%
San Diego	15.1%
Nevada	52.8%
Las Vegas	46.8%
New York	23.9%
Florida	8.4%
Illinois	5.7%
Texas	5.5%

Leisure Activities	
Shopping	90.7%
Dining in Restaurants	89.2%
Sightseeing in Cities	67.6%
Visit Historical Places	67.0%
Visit National Parks	61.9%
Touring Countryside	59.9%
Visit Small Towns	49.8%
Amusement/Theme Parks	48.1%
Casinos/Gambling	47.7%
Cultural Heritage Sites	39.9%
Guided Tours	34.8%
Art Gallery/Museum	31.2%
Visit Native Am. Comm.	27.9%
Nightclubs/Dancing	22.2%
Concert/Play/Musical	21.6%
Water Sports/Sunbathing	20.3%
Attend Sports Event	19.6%
Camping/Hiking	17.5%
Cruises	12.0%
Environ./Eco Excursions	9.5%
Ethnic Heritage Sites	8.1%
Ranch Vacations	4.7%
Golfing/Tennis	2.7%
Snow Skiing	2.2%
Hunting/Fishing	1.6%



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

*Data sample was aggregated from years 2003-2004.

Total Overseas Air Visitors From Australia Profile*

Demographics:

Age	
Male Average	47.4 years
Female Average	42.0 years

Gender	
Male	60.9%
Female	39.1%

Port of Entry	
Los Angeles	79.0%
San Francisco	7.6%
Other	5.0%
Honolulu	4.6%
Chicago	2.5%
New York	1.4%

Household Income	
Average HH Income	\$86,900
< \$40,000	25.0%
\$40,000 - \$79,999	33.2%
\$80,000 - \$119,999	15.0%
\$120,000+	27.0%

Frequent Travelers	
Repeat Visitor to the U.S.	56.5%
U.S. Trips last 12 Months	1.5
U.S. Trips last 5 Years	4.3
1 Trip	51.4%
2 - 5 Trips	24.8%
6+ Trips	23.7%

Party Composition	
Avg. Travel Party (mean)	1.5
Traveling Alone	42.5%
Spouse	39.5%
Family/Relatives	24.0%
Friends	7.7%
Business Associates	4.7%
Group Tour	0.7%
Adults Only	92.5%
Adults and Children	7.5%

Trip Behaviors:

Expenditures	
Avg. Spending Per Person Per Day	\$109

AZ Destinations Visited	
Phoenix	45.4%
Grand Canyon NP	37.1%
Tucson	12.2%
Glen Canyon NP	0.1%

Advance Trip Planning	
Advance Trip Decision	113.9 days
Advance Air Reservations	71.9 days
Use of Pre-Booked Lodging	72.9%

Use of Packages	
YES	20.9%
Air/Lodging	11.8%
Guided Tour	9.7%
Air/Rental Car	6.6%
Air/Lodging/Rental Car	5.7%
Air/Lodging/Bus	3.4%
Air/Lodging/Tour	2.5%
Air/Lodging/Bus/Tour	1.0%

Accommodations	
Hotel/Motel	71.8%
Private Home	25.5%
Other	8.8%

Length of Stay	
# of Nights in Arizona (mean)	5.4
# of Nights in U.S. (mean)	24.4

Information Sources	
Travel Agency	75.0%
Personal Computer	36.3%
Friends/Relatives	20.1%
Airlines Directly	15.2%
Travel Guides	14.7%
Newspapers/Magazines	6.7%
State/City Travel Office	5.0%
Corporate Travel Dept.	4.4%
Other	3.8%
Tour Company	2.3%

Transportation in U.S.	
Airlines in U.S.	52.3%
Rented Auto	51.1%
Taxi/Cab/Limousine	43.1%
Company or Private Auto	33.4%
City Subway/Tram/Bus	27.6%

*Data sample was aggregated from years 2003-2004.

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



Total Overseas Visitors From Canada Profile

Demographics:

Visitation Volume	
Total Visitation from Canada	356,300

Age	
2-19 years	3.3%
20-34 years	9.1%
35-54 years	25.1%
55-74 years	50.7%
75+ years	6.2%

Mode of Entry	
Airplane	59.5%
Auto	37.4%
Via US	1.6%
Bus	0.8%
Other	0.7%

Gender	
Male	47.6%
Female	46.8%

Visitors by Province	
Ontario	32.2%
Alberta	25.5%
BC & Territories	23.6%
Quebec	6.4%
Saskatchewan	4.9%
Manitoba	4.4%
Atlantic Canada	3.0%

Party Composition	
Avg. Travel Party (mean)	1.91
Traveling Alone	12.1%
2 Adults	62.4%
3+ Adults	14.0%
Adults and Children	6.0%
Other	5.5%

Travel Party Size	
1 person	14.6%
2 persons	65.7%
3 persons	5.8%
4 persons	7.2%
5-9 persons	6.0%
10 + persons	0.9%

Trip Behaviors:

Visit Spending Range* (US\$)	
Average Spending per Visit	\$801.55
Average Spending per Night	\$41.97
\$0-\$229 US	13.1%
\$230 - \$1,536 US	46.4%
\$1,537 - \$6,146 US	36.3%
\$6,147+ US	3.9%
* Annualized conversion rate for 2004 - \$1 US = 1.30152024 CDN	

Accommodations	
Hotel/Motel	33.2%
Private Home	17.3%
Camping or Trailer Park	14.0%
Combination 2 or more accommodation types	9.4%
Other	8.1%
Hotel/Motel & Private Home	5.3%
Combination of Hotel/Motel	3.3%
Cottage/Cabin	2.3%

Purpose of Trip	
Holiday, Vacation	57.0%
Visit Friends/Relatives	16.8%
Visit Second Home, Cottage, Condo	8.2%
Meetings	5.6%
Convention, Conference, Trade Show, Seminar	5.0%
Personal (medical, wedding, etc.)	2.1%
Other	1.8%
Other Work	1.6%
Attend Events, Attractions	1.5%

Quarter of Travel	
1st Quarter	40.3%
2nd Quarter	27.6%
3rd Quarter	9.4%
4th Quarter	22.7%

Length of Stay	
# of Nights in Arizona (mean)	19.1
1-3 nights	25.0%
4-9 nights	34.6%
10-20 nights	19.1%
21 + nights	21.3%

Source: Statistics Canada