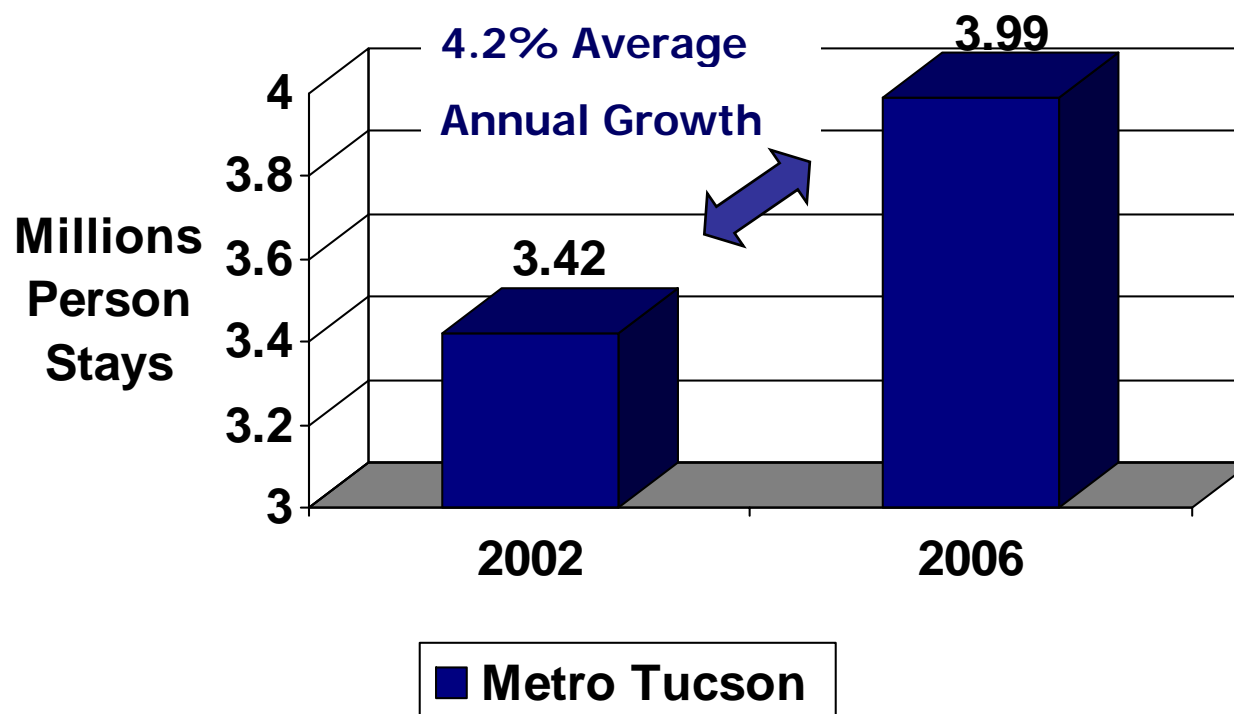


Overnight Visitor Base – Average Annual Growth



Overnight Visitor Growth



Source: DK Shifflet & Assoc

Overnight Visitor Segmentation



- ◆ Leisure/business segmentation similar to Arizona and national averages
- ◆ Business mix slightly lower than these norms

Travel Segment	Metro Tucson %	State of Arizona %	U.S. %
Overnight Leisure	77.5	76.3	75
Overnight Business	22.5	23.7	25

Source: DK Shifflet & Assoc



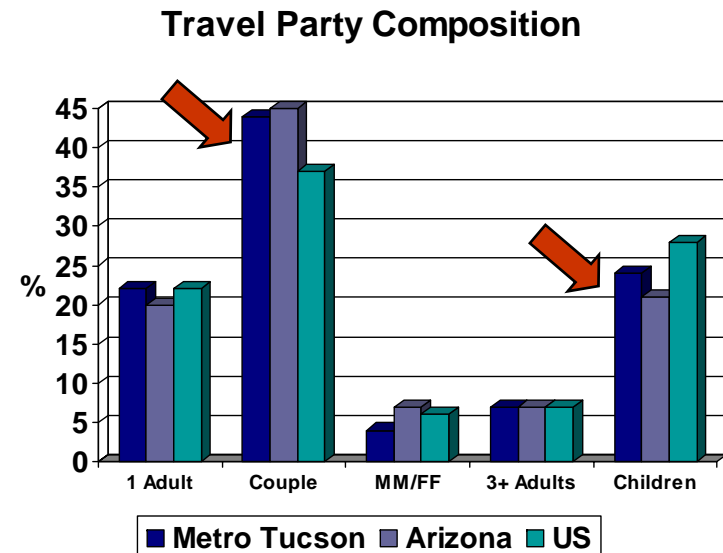
OUTSIDE Mountain Biking in the Desert
Photo by James Rankley © Metropolitan Tucson Convention & Visitors Bureau



Overnight Leisure Visitor - Travel Party Composition



- ◆ Larger mix of couples – fewer children when compared to national norms
- ◆ 2.49 average party size – slightly larger than both state and national averages - 2.3 for Arizona and 2.45 for U.S. overall



Source: DK Shifflet & Assoc

Overnight Leisure Visitor - Purpose of Stay



- ◆ 5 purpose categories
- ◆ VFR is a key driver for region's leisure visitor – 1.5 times national norms
- ◆ Engaging, educating resident base on attributes is key
- ◆ Potential to build weekend getaways

Travel Segment	Metro Tucson %	State of Arizona %	U.S. %
Getaway Weekend	9	13	20
General Vacation	15	20	19
Special Event	11	13	15
Other Personal	10	14	10
Visiting Friends & Relatives	55	40	36

Source: DK Shifflet & Assoc

Overnight Leisure Visitor - Repeat Visitation Performance



- ◆ Repeat visitation of key importance
- ◆ Somewhat higher level of first time visits
- ◆ At or above national averages for early and mature repeat segments
- ◆ Potential to build moderate repeat segment

Number of Visits	Metro Tucson %	U.S. %
First Time 0-1	35	30
Early Repeat 2-3	25	25
Moderate Repeat 4-9	15	21
Mature Repeat Over 10	26	24

Source: DK Shifflet & Assoc

Overnight Leisure Visitor – Top Activities



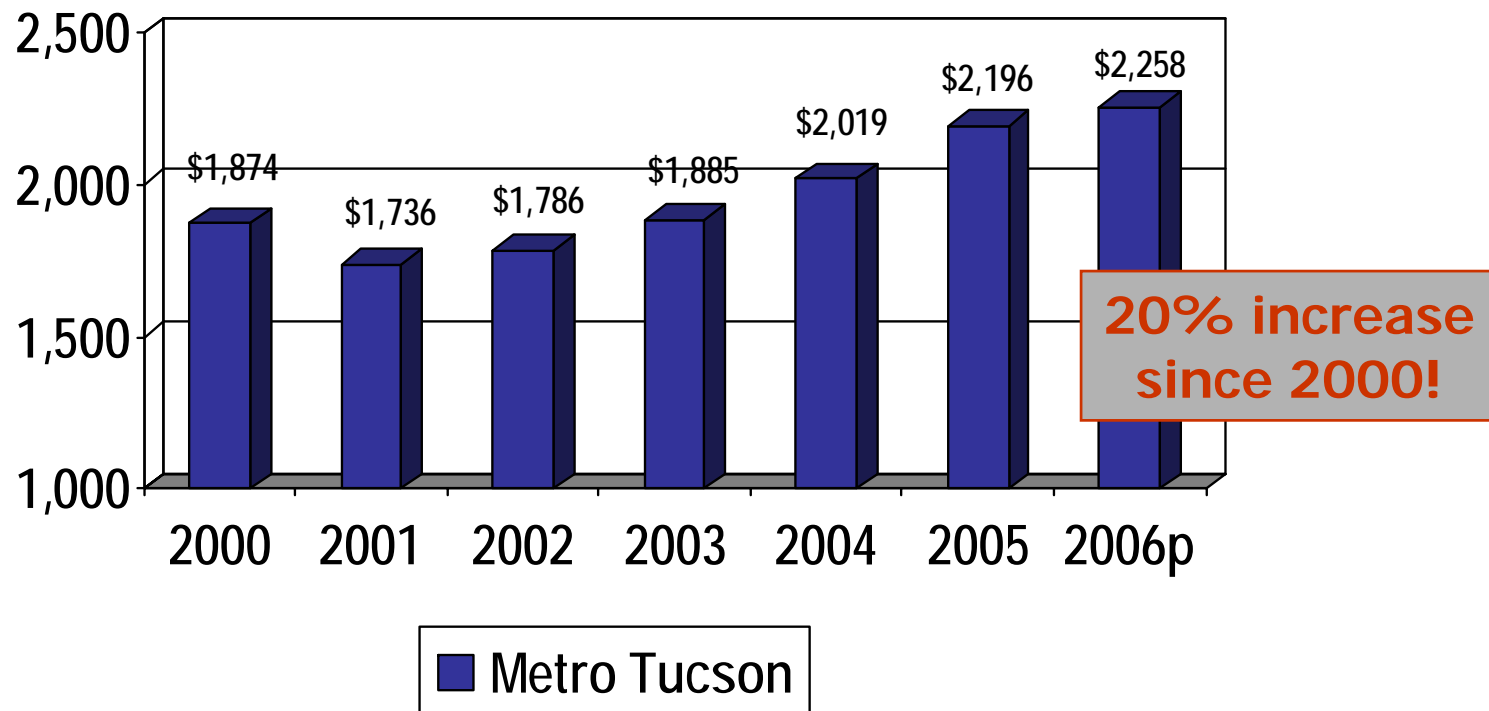
Top Origin DMAs	Metro Tucson %	U.S. %
Dining	31.9	31.6
Shopping	24.9	25.3
Sightseeing	28.7	21.6
National or State Park	13.8	7.0
Hike, Bike	7.2	3.9
Museum, Art Exhibit	6.6	5.2
Watch Sports	5.2	4.5
Festival, Events	4.7	3.9
Entertainment	18.5	22.9
Night Life	6.7	9.3

Source: DK Shifflet & Assoc

Visitor Spending Trends



Direct Visitor Spending - \$ Millions



Source: Arizona Travel Impacts 1998-2006p – Dean Runyan Associates

Spending by Commodity Purchased



Food & Beverage	24%
Retail Sales	23%
Lodging	18%
Arts, Entertainment & Recreation	15%
Ground Transportation & Motor Fuel	14%
Food Stores	5%
Air Transportation	1%

Source: Arizona Travel Impacts 2005 – Dean Runyan Associates

Employment Makeup



	Employment
Direct	25,870
Indirect/Induced	13,723
Total	39,593

Source: Arizona Travel Impacts 2005 – Dean Runyan Associates