

AOT's Target Life Stages



Younger Years (no children) - \$75K+



Family Life - \$100K+



Gen X Older (no children) - \$75K+



Young Boomers (with children) - \$100K+



Young Boomers (no children) - \$100K+



Older Boomers (no children) - \$100K+

Represents 30% of all US households



Arizona Lifestage Performance

(May 2013 - April 2014)

% Percent of Visitor
Visa Spend

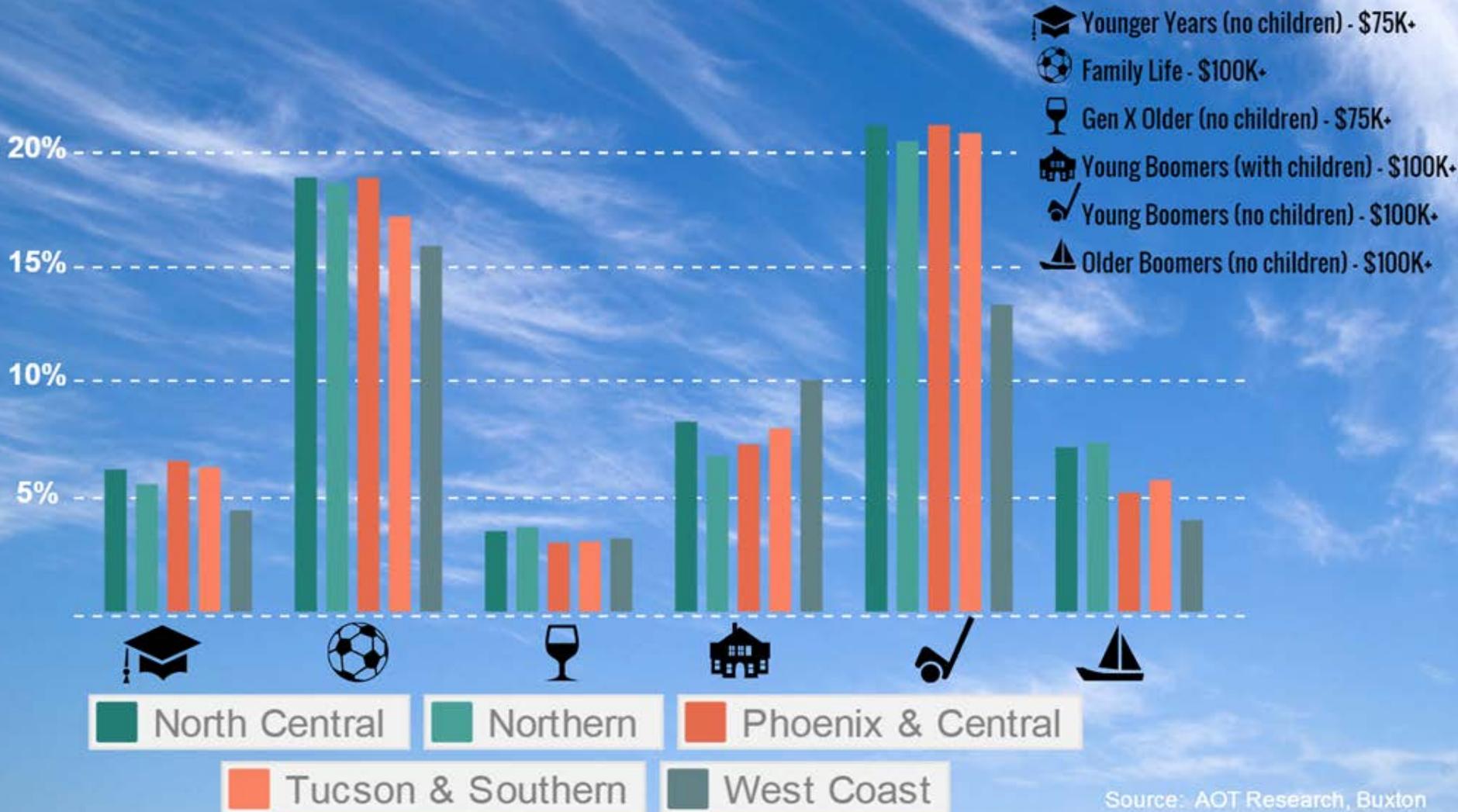


-  Younger Years (no children) - \$75K+
-  Family Life - \$100K+
-  Gen X Older (no children) - \$75K+
-  Young Boomers (with children) - \$100K+
-  Young Boomers (no children) - \$100K+
-  Older Boomers (no children) - \$100K+

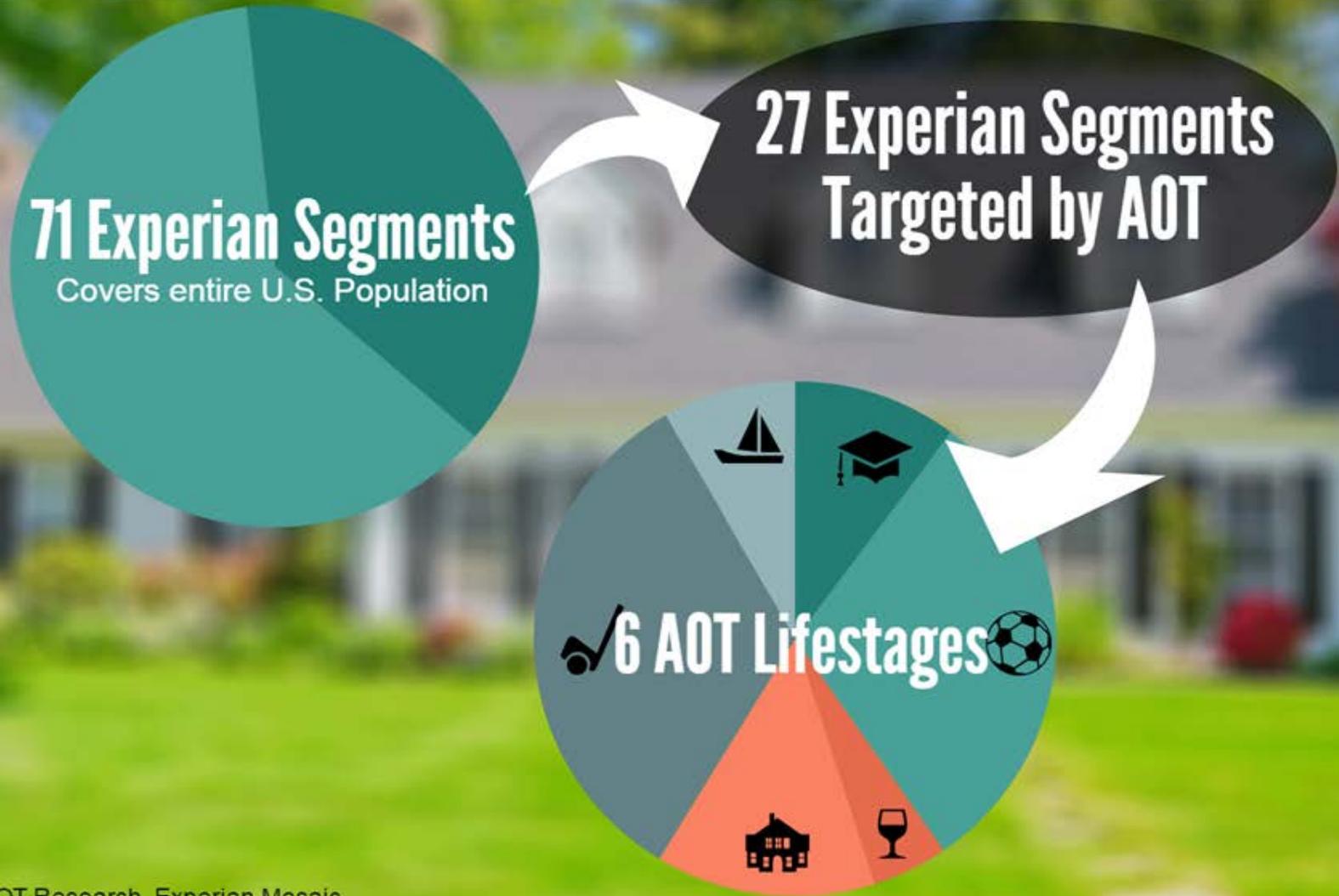
Represents
61.4%
of Arizona
visitors

Lifestage Performance

% Percent of Visa Card Spend



Lifestages and Segments



High Performing Experian Segments



C11

Aging of Aquarius

White collar Baby Boomers
Read print newspapers and travel
magazines
Travel domestically and internationally
Casinos and Cruises

	Rank	Percentage of Spend
Arizona	1	8.6%
North Central	1	9.5%
Northern	1	9.0%
Phoenix & Central	1	8.6%
Tucson & Southern	1	8.7%
West Coast	1	7.4%

High Performing Experian Segments



A02

Platinum Prosperity

Affluent, high-powered professionals
Read in-flight, business, and culinary
magazines

Travel domestically and internationally
Live theater, museums, concerts

	Rank	Percentage of Spend
Arizona	2	7.3%
North Central	2	7.5%
Northern	2	7.3%
Phoenix & Central	2	8.3%
Tucson & Southern	2	7.4%
West Coast	7	3.1%

High Performing Experian Segments



A01

American Royalty

Wealthiest households
Luxury

Read in-flight, business, and culinary
magazines

Travel domestically and internationally

Attend sports events, golf, cycling,
hiking

	Rank	Percentage of Spend
Arizona	3	7.3%
North Central	4	4.2%
Northern	4	3.8%
Phoenix & Central	3	4.2%
Tucson & Southern	3	4.5%
West Coast	24	1.6%



Page Springs Cellars



London Bridge



Winslow

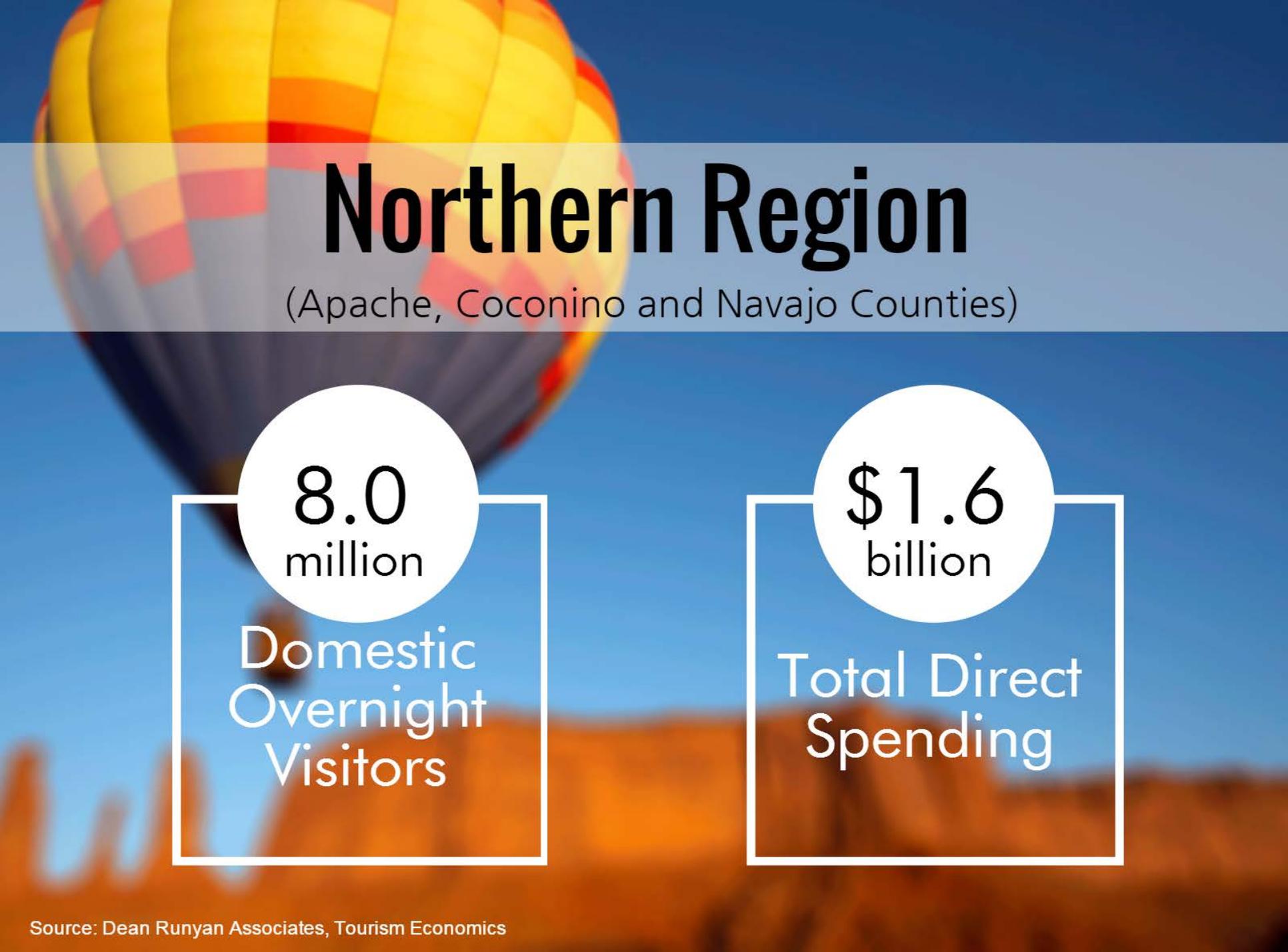
Regional Profiles



Musical Instrument Museum



San Xavier del Bac



Northern Region

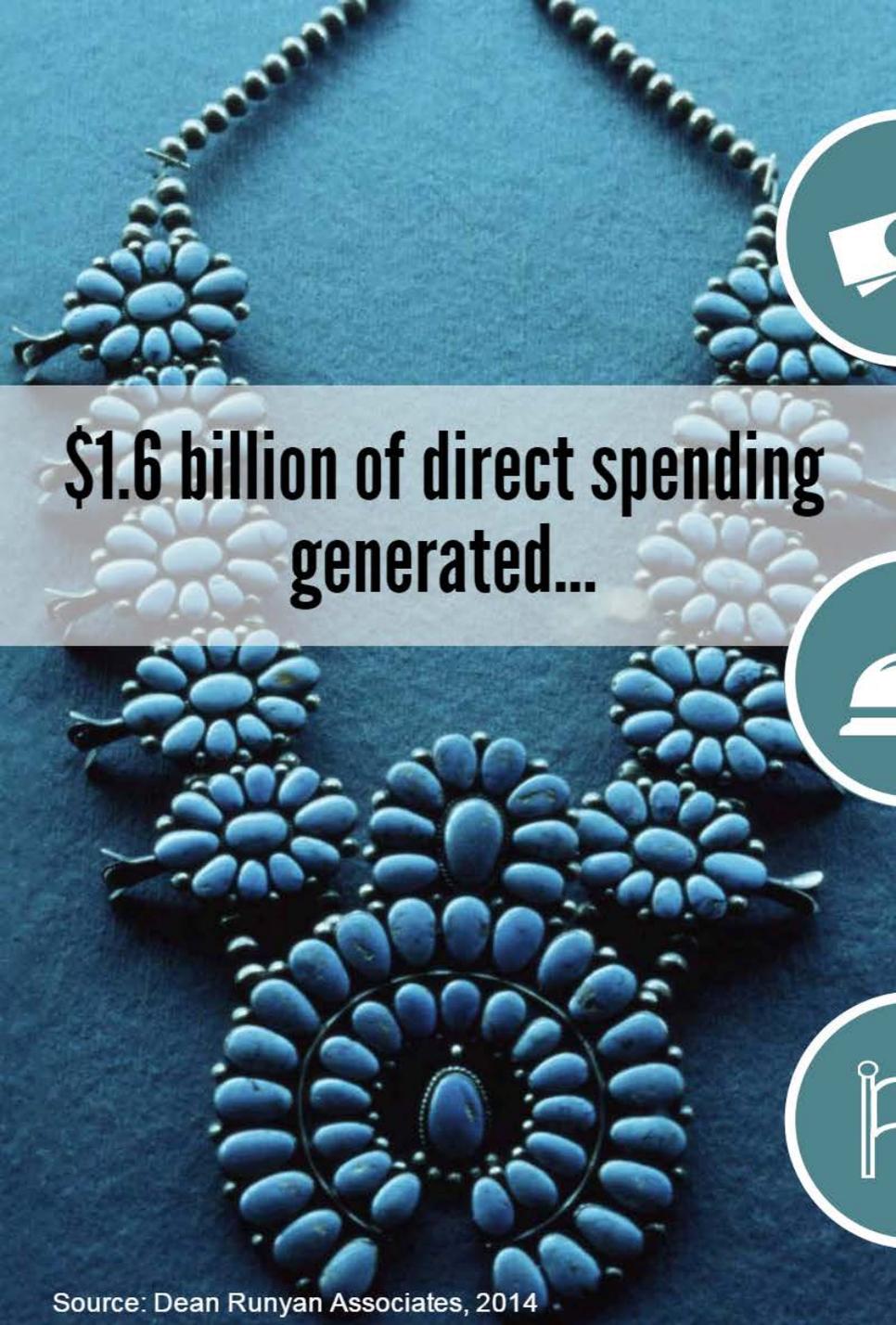
(Apache, Coconino and Navajo Counties)

8.0
million

Domestic
Overnight
Visitors

\$1.6
billion

Total Direct
Spending



\$437 million

employment earnings

Up 5.6% YOY



17,000

industry jobs

Up 2.4% YOY



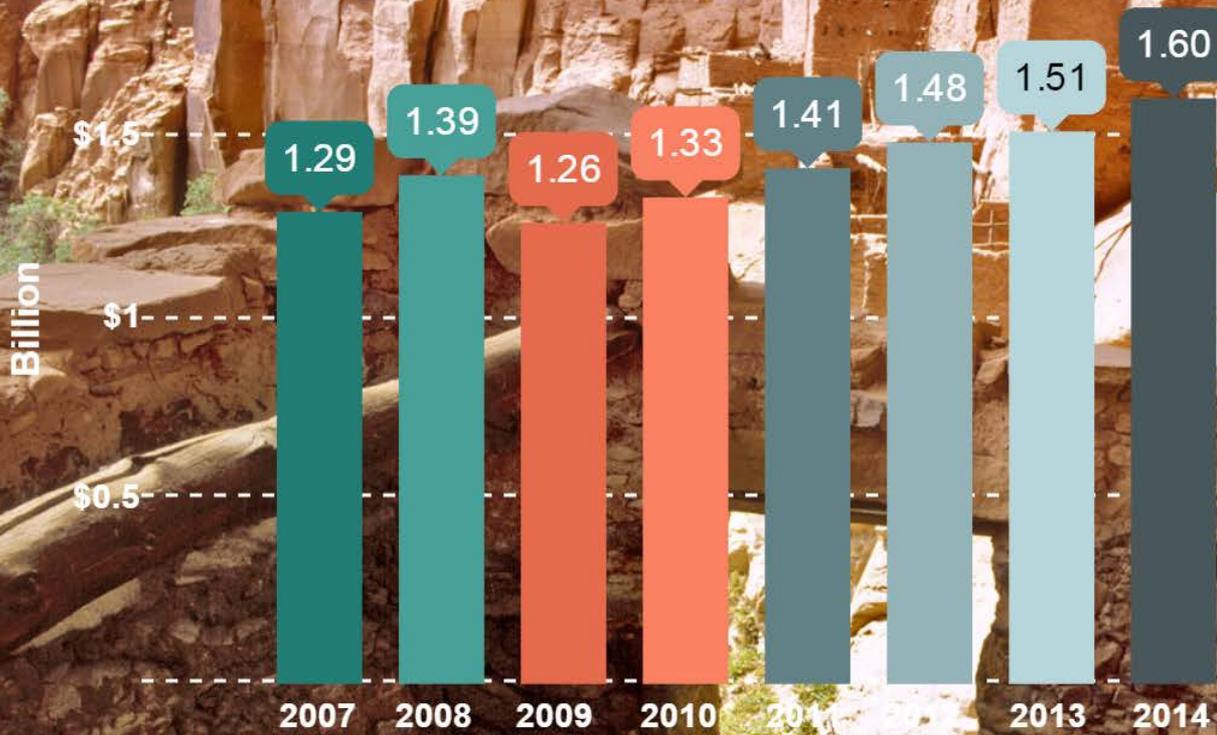
\$130 million

state and local
tax revenue

2.2% YOY

**\$1.6 billion of direct spending
generated...**

Direct Travel Spending in Northern Region

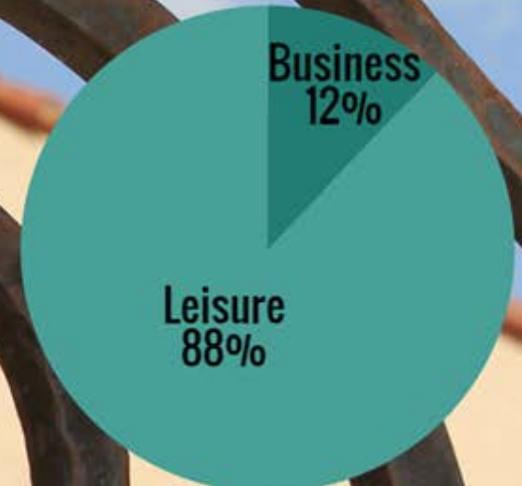
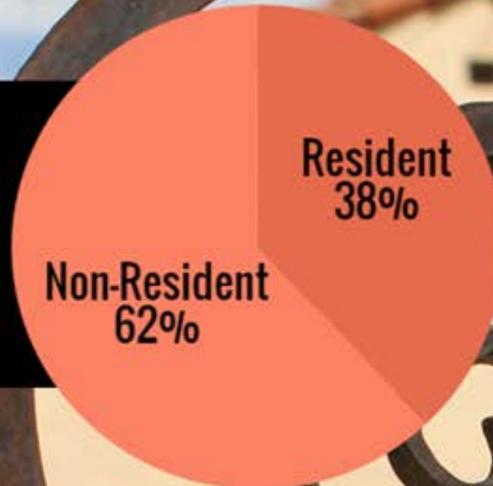


↑ **6.2%**
YOY

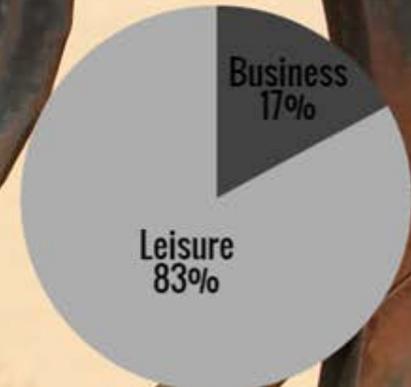
↑ **24.0%**
Compared to
2007

Domestic Overnight Visitation to Northern Region

Northern Region



Arizona



Northern Region Domestic Overnight Visitor Portrait



3.3 nights

3.1 persons per party

\$644 trip expenditures*

78% paid accommodations

\$68,430 average household income

42.7 average age

Top 5 Activities

Shopping

Fine Dining

National/State Park

Landmark/Historic Site

Hiking/Backpacking

Source: Longwoods International, 2014

*Does not include transportation to and from destination

Northern Region 2014 Indicator Performance

State Parks



285,339

Total Visitors

Down* -27% YOY

National Parks



9 million

Recreational
Visits

Up 6.7% YOY

Airports



231,944

Passengers

Up 12% YOY

*Due to closure of Slide Rock SP after Slide Fire in Oak Creek Canyon

West Coast Region

(La Paz, Mohave and Yuma Counties)

5.0
million

Domestic
Overnight
Visitors

\$1.4
billion

Total Direct
Spending



\$1.4 billion of direct spending generated...



\$315 million

employment earnings

Up 1.8% YOY



13,180

industry jobs

Down -0.7% YOY

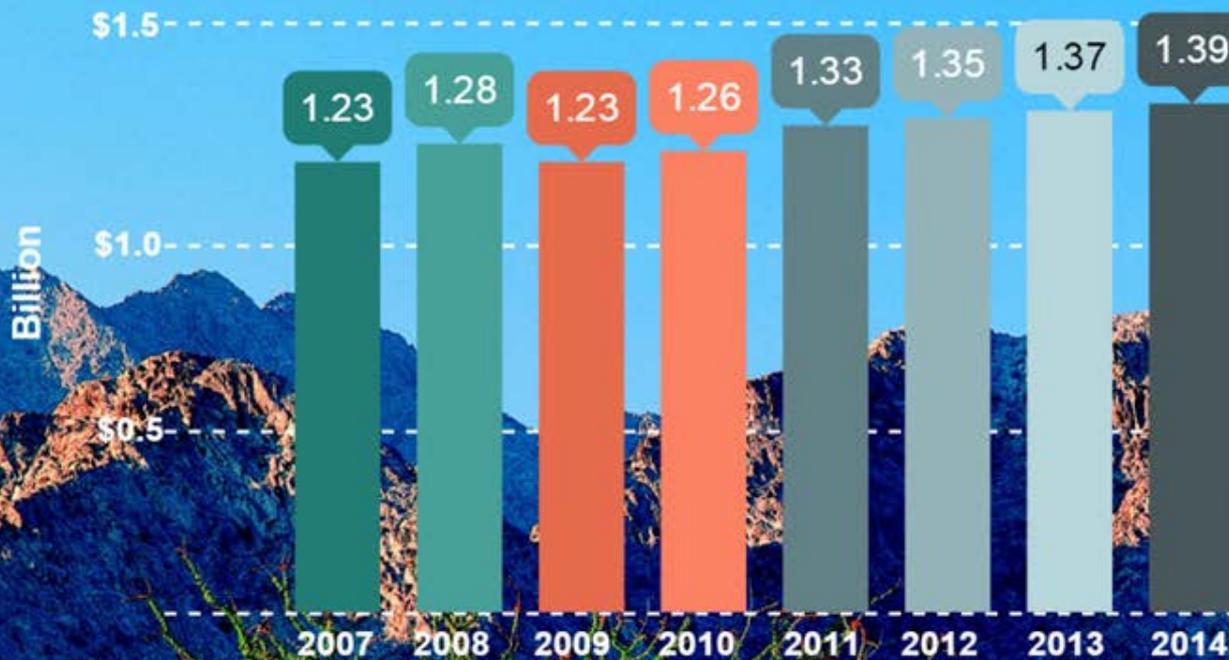


\$97 million

state and local
tax revenues

Down* -8.5% YOY

Direct Travel Spending in West Coast Region

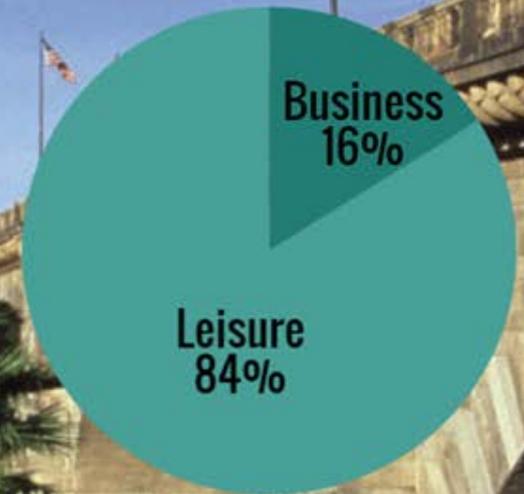
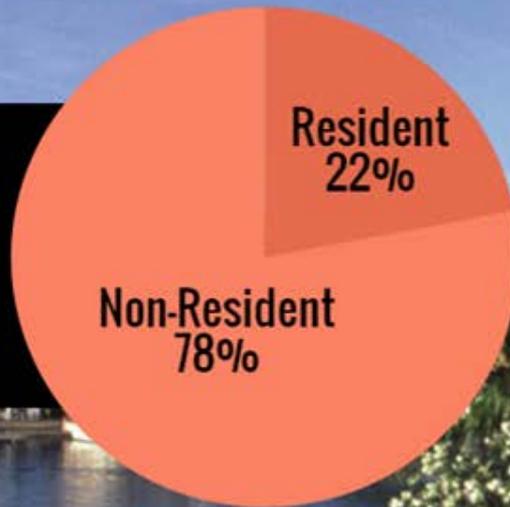


↑ **1.3%**
YOY

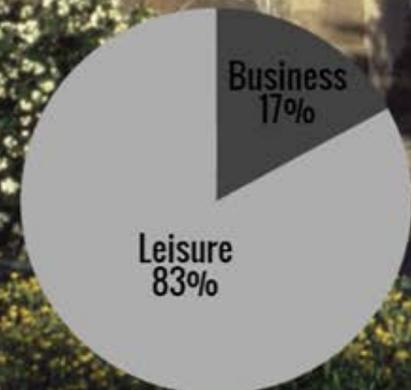
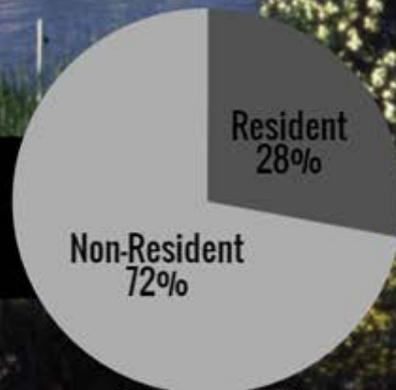
↑ **13.0%**
Compared to
2007

Domestic Overnight Visitation to West Coast Region

West Coast Region



Arizona



West Coast Region Domestic Overnight Visitor Portrait



3.3	nights
3.1	persons per party
\$537	trip expenditures*
78%	paid accommodations
\$70,170	average household income
40.3	average age

Top 5 Activities

Shopping

Fine Dining

National/State Park

Swimming

Casino

Source: Longwoods International, 2014

*Does not include transportation to and from destination

West Coast Region 2014 Indicator Performance

State Parks



686,785

Total Visitors

Up 9.8% YOY

National Parks



2 million

Recreational
Visits

Up 8.5% YOY

Airports



392,010

Passengers

Up 3.2% YOY

North Central Region

(Gila and Yavapai Counties)

5.0
million

Domestic
Overnight
Visitors

\$1.0
billion

Total Direct
Spending



\$1.0 billion of direct spending generated...



\$249 million
employment earnings

Up 3.2% YOY



10,750
industry jobs

Up 1.9% YOY



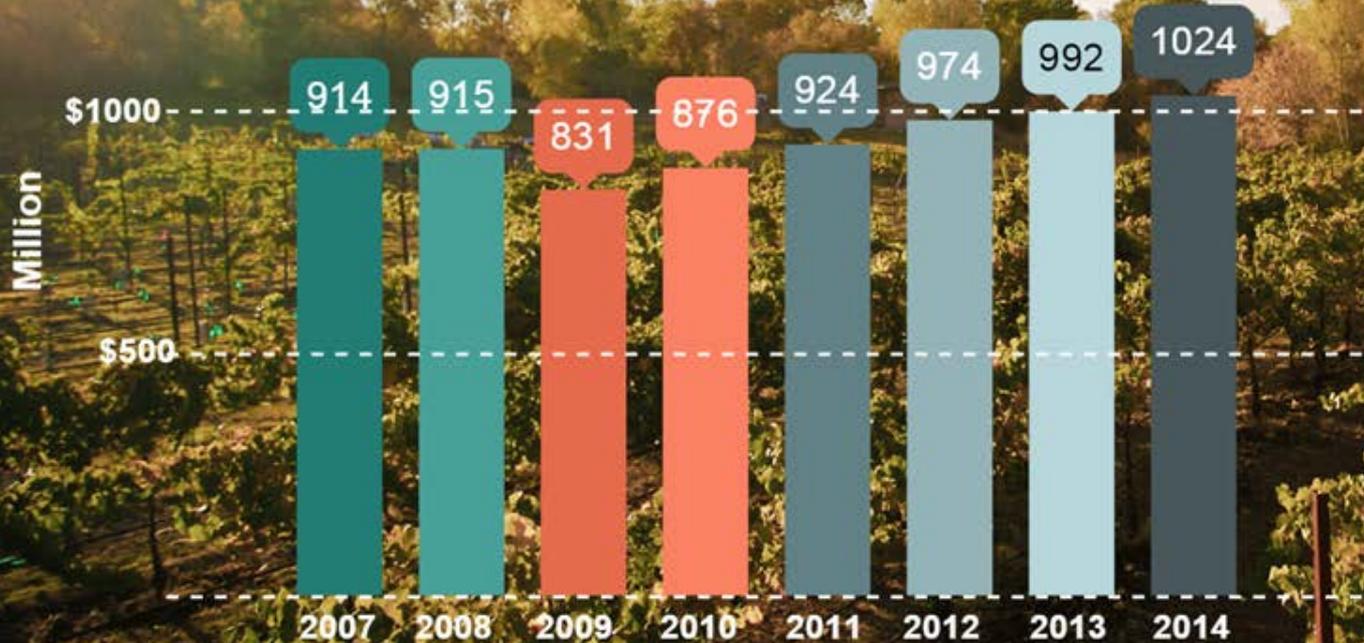
\$75 million
state and local
tax revenues

Down* -1.3% YOY

Source: Dean Runyan Associates, 2014

*Decline due to expiration of temporary 1% sales tax in May 2013

Direct Travel Spending in North Central Region

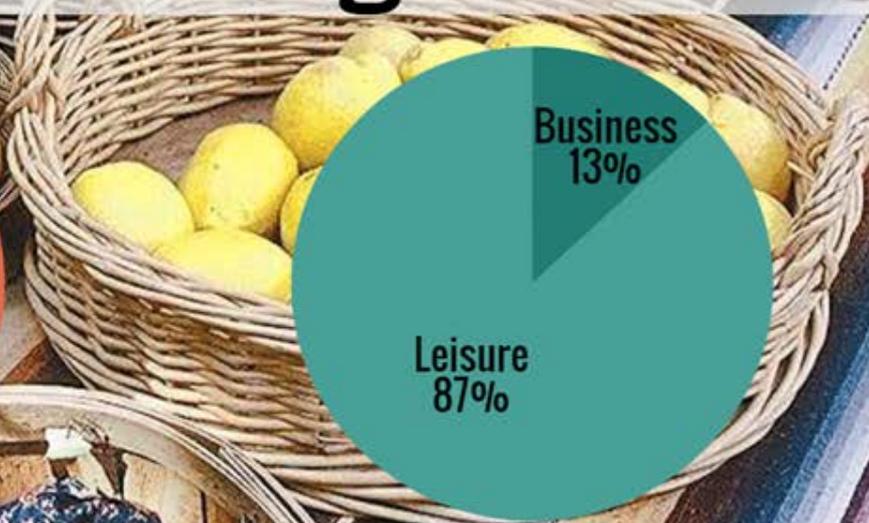
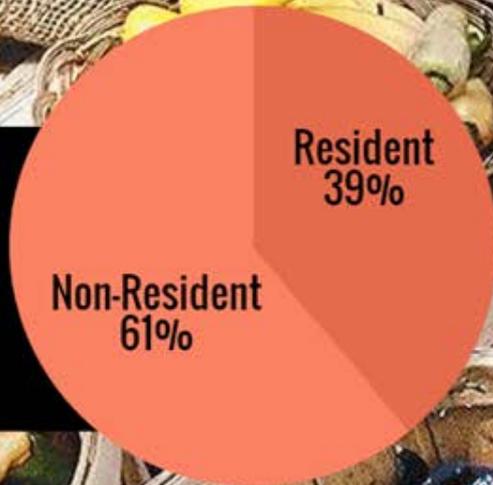


↑ **3.2%**
YOY

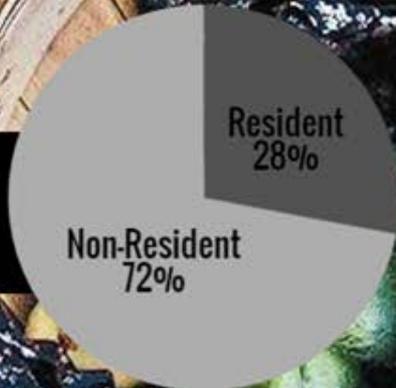
↑ **11.6%**
Compared to
2007

Domestic Overnight Visitation to North Central Region

North Central Region



Arizona



North Central Region Domestic Overnight Visitor Portrait



4.0	nights
3.0	persons per party
\$678	trip expenditures*
72%	paid accommodations
\$71,690	average household income
45.3	average age

Top 5 Activities

Shopping

Fine Dining

National/State Park

Landmark/Historic
Site

Hiking/Backpacking

Source: Longwoods International, 2014

*Does not include transportation to and from destination

North Central Region 2014 Indicator Performance

State Parks



393,586

Total Visitors

Up 10.4% YOY

National Parks



572,635

Recreational
Visits

Up 11.3% YOY

Airports



7,786

Passengers

Down 26.2% YOY

Tucson & Southern Region

(Cochise, Graham, Greenlee, Pima and Santa Cruz Counties)

6.0
million

Domestic
Overnight
Visitors

\$3.6
billion

Total Direct
Spending



**\$3.6 billion of direct spending
generated...**



\$780 million

employment earnings

Up 6.8% YOY



30,500

industry jobs

Up 3.4% YOY

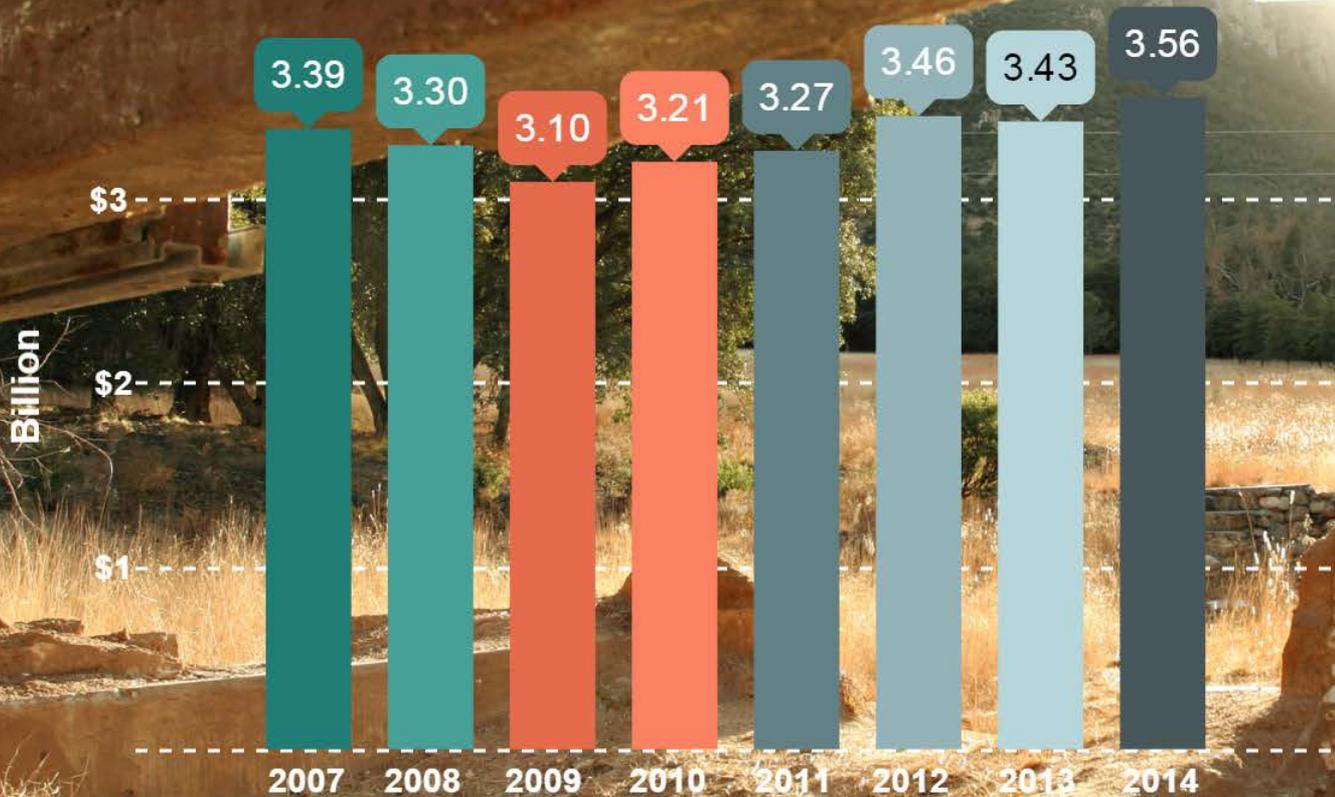


\$239 million

state and local
tax revenues

Down* -10.8% YOY

Direct Travel Spending in Tucson & Southern Region

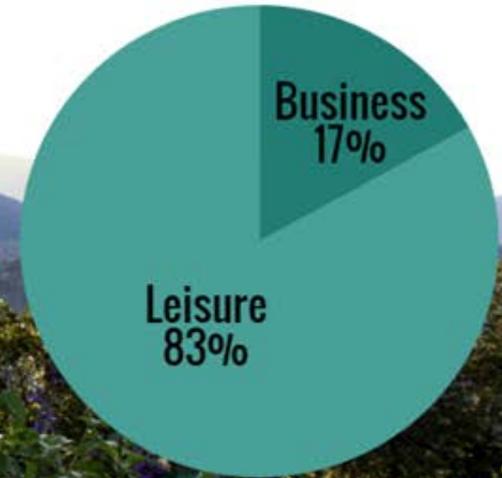


↑ **3.9%**
YOY

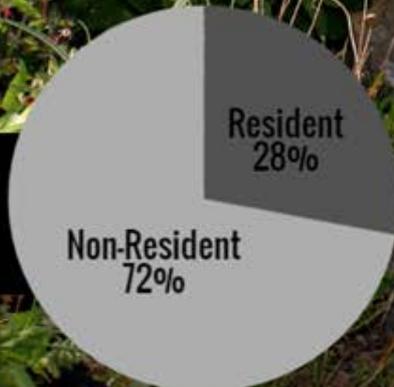
↑ **5.0%**
compared to
2007

Domestic Overnight Visitation to Tucson & Southern Region

Tucson & Southern Region



Arizona



Tucson & Southern Region Domestic Overnight Visitor Portrait



4.4 nights

2.6 persons per party

\$730 trip expenditures*

60% paid accommodations

\$67,060 average household income

47.1 average age

Top 5 Activities

Shopping

Fine Dining

National/State Park

Landmark/Historic
Site

Swimming

Source: Longwoods International, 2014

*Does not include transportation to and from destination

Tucson & Southern Region 2014 Indicator Performance

State Parks



628,795

Total Visitors

Up 6.8% YOY

National Parks



1.09 million

Recreational
Visits

Up 3.0% YOY

Airports



3.25 million

Passengers

Up 0.3% YOY

Phoenix & Central Region

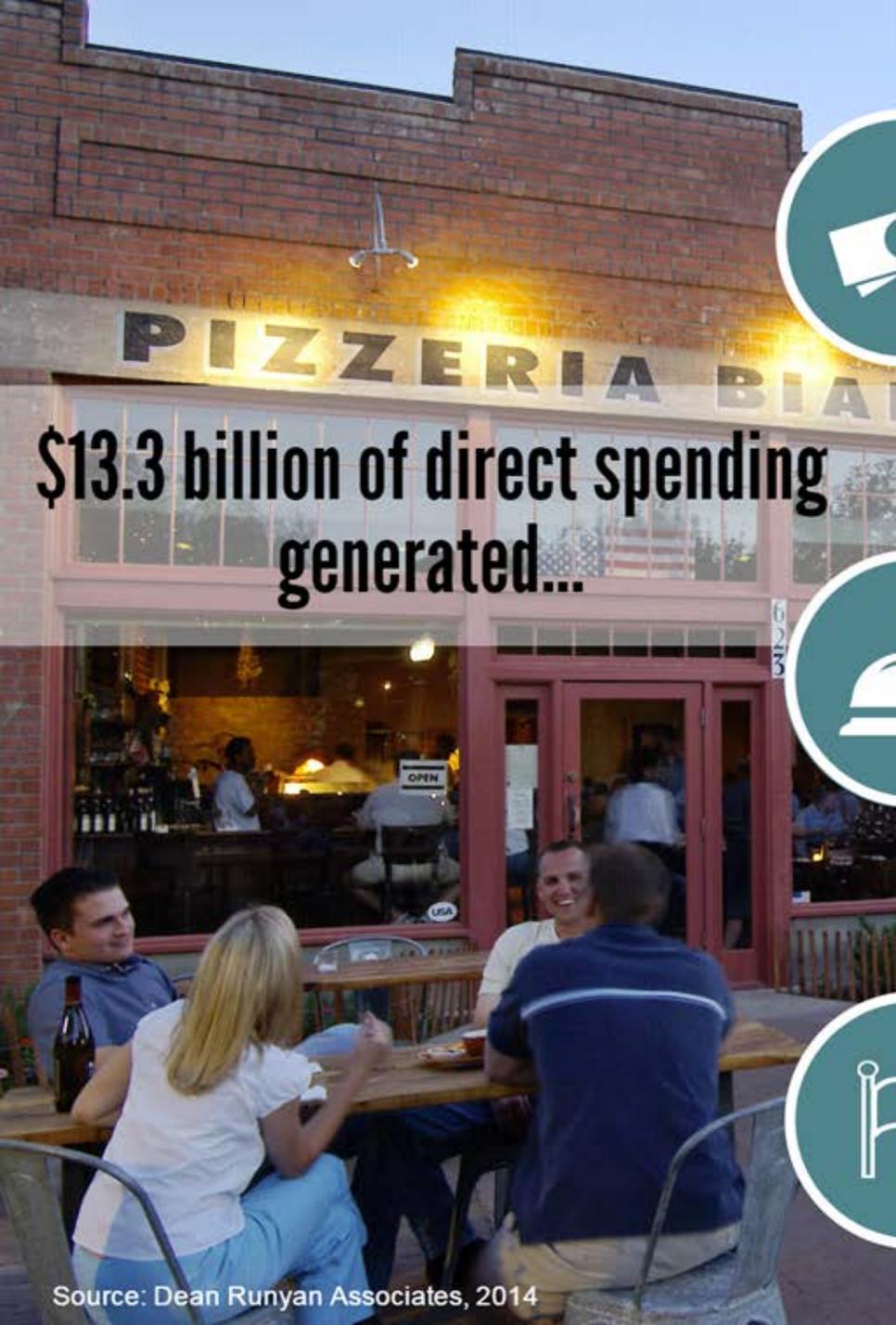
(Maricopa and Pinal Counties)

19.0
million

Domestic
Overnight
Visitors

\$13.3
billion

Total Direct
Spending



\$13.3 billion of direct spending generated...



\$4.1 billion
employment earnings

Up 6.9% YOY



100,150
industry jobs

Up 5.0% YOY



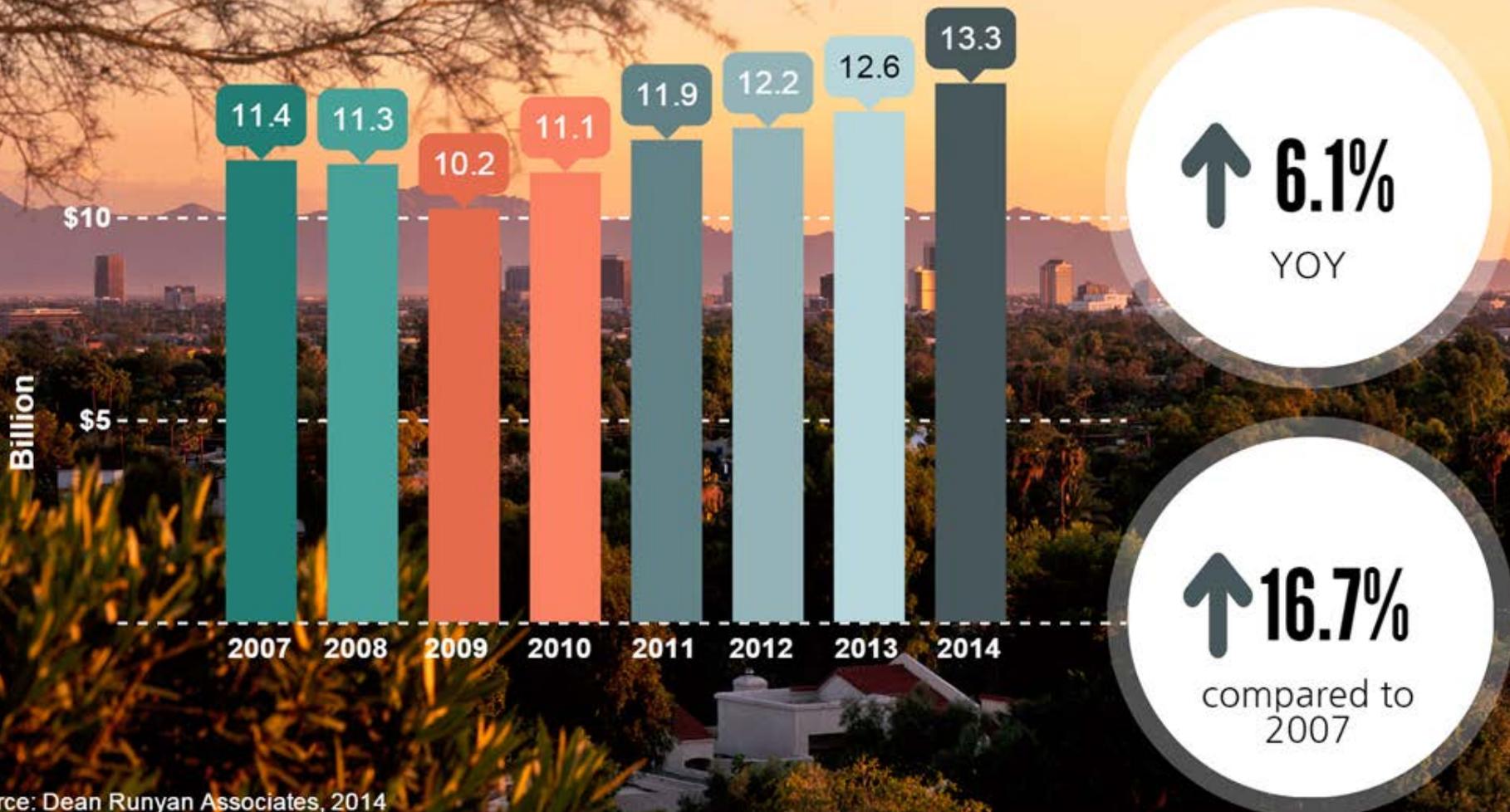
\$991 million
state and local
tax revenues

Down* -0.5% YOY

Source: Dean Runyan Associates, 2014

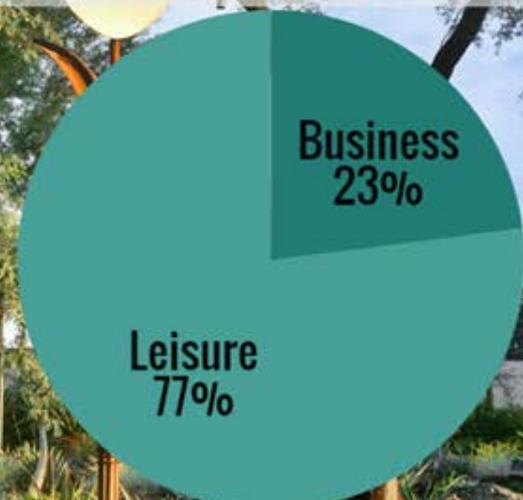
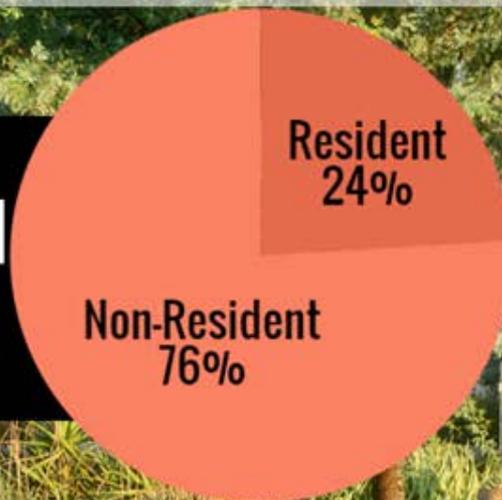
*Decline due to expiration of temporary 1% sales tax in May 2013

Direct Travel Spending in Phoenix & Central Region

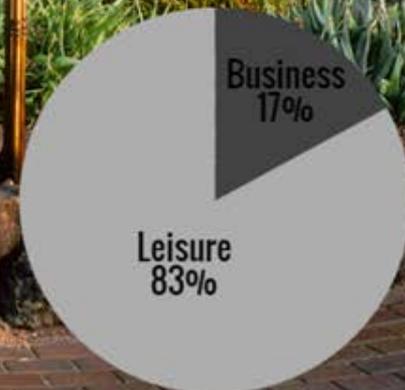
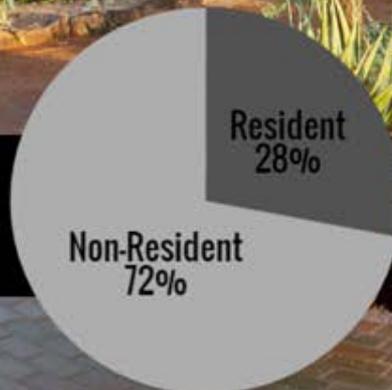


Domestic Overnight Visitation to Phoenix & Central Region

Phoenix & Central Region



Arizona



Phoenix & Central Region Domestic Overnight Visitor Portrait

4.4 nights

2.6 persons per party

\$812 trip expenditures*

62% paid accommodations

\$72,540 average household income

46.2 average age

Top 5 Activities

Shopping

Fine Dining

National/State Park

Landmark/Historic Site

Swimming

Source: Longwoods International, 2014

*Does not include transportation to and from destination

State Park Background photo

Phoenix & Central Region 2014 Indicator Performance

State Parks



282,700

Total Visitors

Up 3.9% YOY

National Parks



63,698

Recreational
Visits

Down 2.2% YOY

Airports



43.4 million

Passengers

Up 4.0% YOY