



CACTUS LEAGUE ATTENDEE TRACKING SURVEY
(March, 2012)

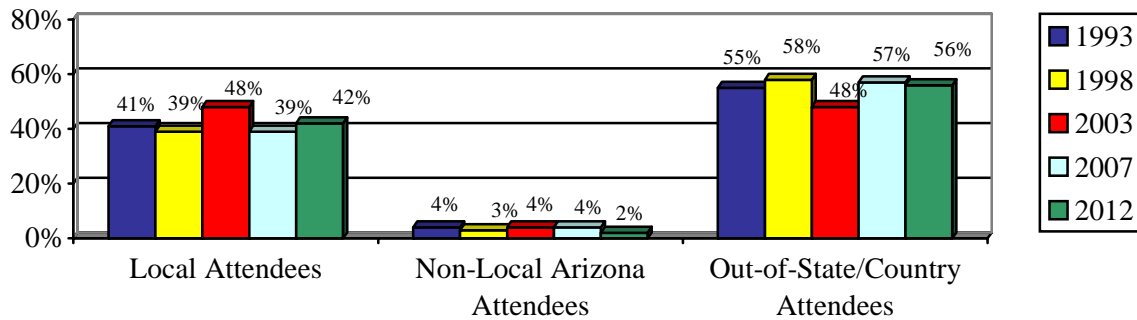
Executive Summary

Objectives and Methodology – The following is a summary of key findings from the Cactus League Attendee Tracking Study conducted by FMR Associates, Inc. for the Cactus League Baseball Association. The primary objective of this project was to track the expenditure impacts that Cactus League baseball game attendees have on the Arizona economy, including a profile (in general and expenditure terms) of attendees. The results of this project were compared to studies conducted for the Cactus League Association in 1993, 1998, 2003 and 2007.

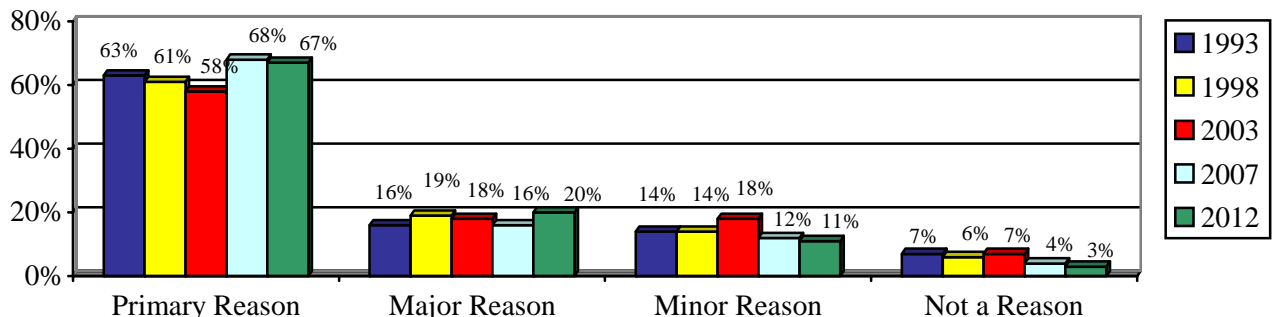
A total of 3,003 interviews were conducted in-person by FMR at home games of each the 15 Cactus League teams at ten stadiums in the Phoenix during the 2012 season.

2012 Cactus League Attendance – Overall, 2012 gate attendance totaled 1,712,042 (up 40.6% compared to 2007). The percentage of out-of-town attendees declined slightly from 61% in 2007 to 58% now. However, the share of out-of-town attendees who indicated that attending spring training games was the *primary* reason for their visit to Arizona remains virtually unchanged (67%).

Composition of Cactus League Attendance



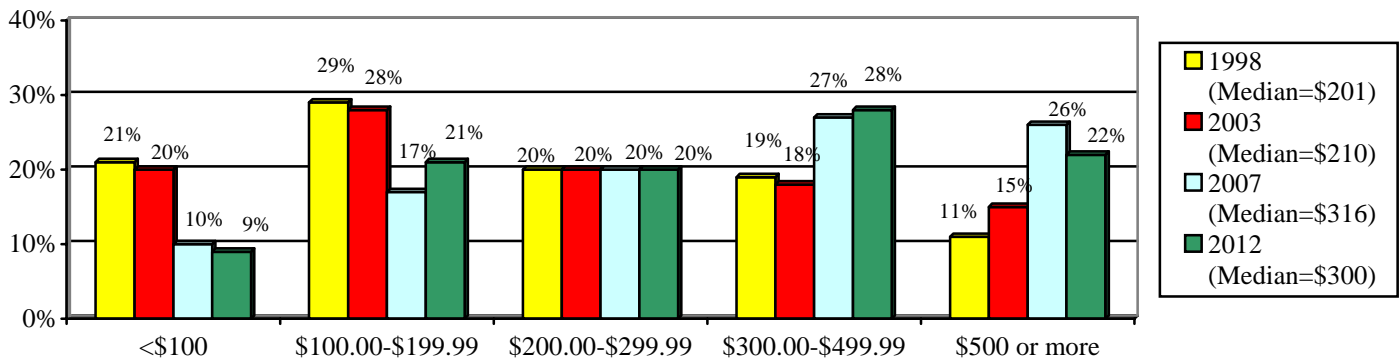
Importance of Spring Training to Decision to Visit Arizona
(Among Out-of-Town Visitors)



Out-of-town attendees who reside in the U.S. come from 1,257 different zip codes (50 from elsewhere in Arizona and 1,207 from another state), while those from outside the country report residing in Canada, England, Belgium, Japan, Mexico and Puerto Rico. The San Francisco Giants, Colorado Rockies and Los Angeles Dodgers attracted the highest percentage of out-of-town attendees. Median attendee game spending (for tickets, food and drink, gas, souvenir shops, etc.) was \$116.67, up 13% from 2007 (\$102.91). San Francisco Giants attendees had the highest per-game spending (\$202.26). The median number of games attended was 2.6, unchanged from 2007.

Visit Characteristics and Spending – Overall, 63% of out-of-town visitors stayed in a hotel, resort or motel while attending 2012 Cactus League games (down 10% from 70% in 2007). Most of the rest (23%) stayed in a private home as a guest. The median length of stay was 5.3 nights (up from 4.7). One-half of out-of-town attendees rented a car, truck or van during their stay (50%, down slightly from 52% in 2007). What other activities (besides baseball) did out-of-town attendees enjoy during their stay? Shopping (31%), fine dining (30%), sightseeing (28%) and visiting with family/friends (27%). Median daily spending among out-of-town travel parties decreased 5% from 2007 (from \$316 to \$300), but remains significantly higher than 2003 (\$210).

Daily Out-of-Town Travel Party Expenditures



Total Expenditure Impact – Overall, out-of-town Cactus League attendees account for \$230, 441,144 in Direct Expenditures, up 36% from \$169,581,477 in 2007. This represents a Total Expenditure Impact of \$422,306,440 (after a multiplier is applied to Direct Expenditures to yield an overall estimated economic impact) – up from \$310,775,015 in 2007.

Expenditure Summary Comparison

	2012	2007	2003	1998	1993	% Change '07 to '12
<u>DIRECT EXPENDITURES</u>	\$230,441,144	\$169,581,477	\$110,012,434	\$108,393,456	\$56,066,943	+35.9%
<u>TOTAL EXPENDITURE IMPACT</u> (Includes multiplier)	\$422,306,440	\$310,775,015	\$201,608,787	\$198,641,846	\$102,748,280	+35.9%