

Verde Valley Tourism Survey



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Executive Summary

This survey of visitors to Arizona's Verde Valley was undertaken in an effort to gather more reliable regional data than is available from statewide or national panel surveys which often contain too few cases to reliably represent area visitation. This survey process collected a total of 1,284 surveys from the Verde Valley communities of Sedona, Cottonwood, Camp Verde, Clarkdale, and Jerome over a 12-month period from December 2006 through November 2007 – a more than sufficient sample size to provide reliable results. This information will assist the Verde Valley communities with targeted marketing, product development, and advocacy for an industry that is critical to the health of the regional economy. Generally, the Verde Valley is a primary destination for affluent Baby-boomer couples on leisure vacations, who stay overnight, dine out, hike and shop for arts and crafts. A summary of the specific findings of the visitor survey follows:

- ❖ Data for the tourism survey were collected in the communities of Sedona (55.5%), followed by Cottonwood (19.0%), Camp Verde (12.8%), Clarkdale (11.0%) and Jerome (1.8%).
- ❖ More males (60.2%) than females (39.8%) appeared in the survey sample.
- ❖ The average age of visitors was 52.8 years (median age 55.0 years), with males (52.1 years) slightly younger than female visitors (53.9 years).
- ❖ The average party size was 2.6 people (1.3 men, 1.4 women). Less than 13 percent of parties traveled with children under the age of 18 years.
- ❖ The great majority of visitors (63.4%) traveled in family groups, while a further 14.9 percent traveled in groups of family and friends. Friends only parties (12.1%) and organized tour groups (7.5%) accounted for most of the remaining travel party types.
- ❖ Travelers to the Verde valley had high average annual household incomes, \$72,310 on average.
- ❖ Impressively, more than two-thirds of visitors (69.3%) indicated that the Verde Valley was their primary destination; less than one-third (30.7%) were bound to another destination.
- ❖ Travelers visited all Verde valley communities, although Sedona (84.9%) and Jerome (48.8%) received the most visits.
- ❖ Most visitors to the Verde Valley were traveling for vacation-leisure purposes (53.5%), followed by day trips (17.5%), and weekend visits (13.2%). Other purposes such as visiting friends and relatives, business, and combinations of business and pleasure accounted for smaller percentages.
- ❖ A majority of visitors to the Verde Valley traveled in a private vehicle (50.9%), a further one-third (36.1%) traveled in a rental car, and 8.8 percent travel in a RV/Camper.
- ❖ Day visitors spent between 4 and 7 hours in the Verde Valley while overnight visitors spent an average of 3.7 days.

- ❖ Overnight visitors to the Verde Valley stayed in a variety of accommodations; 40.8 percent stayed in a hotel or motel, 19.2 percent stayed in a timeshare property, and 13.6 percent stayed in a campground or RV Park.
- ❖ More than half (50.8%) of all respondents who spent the night stayed in the Verde Valley prior to taking the survey, while a larger percentage (64.1%) were staying in the Verde Valley after taking the survey.
- ❖ At least one third of all visitors to the Verde Valley came from Arizona (31%), followed by California (13.7%). Maricopa County (57.3%) accounted for more than half of all Verde Valley visitors. Canadian visitors accounted for more than half (57.7%) of all international visitors.
- ❖ Visitors had moderate expenditures in the Verde Valley. Average per party per day expenditures by category were: lodging (\$120), restaurant and grocery (\$80), transportation including gas (\$51), shopping or arts and crafts purchases (\$75), recreation-tour-entrance fees or permits (\$25), spa-spiritual-metaphysical (\$22), and “other” (\$50).
- ❖ Visiting state and national parks and visiting historic places were the most popular activities for visitors to the Verde Valley. These were followed by hiking and shopping, bird watching and observing wildlife, and enjoying area streams and rivers.
- ❖ Verde Valley visitors explored a wide variety of attractions. Sedona (68.5%) and Jerome (50.7%) were the most visited communities or attractions. National and state parks, vortex sites, and local shopping areas were also popular attractions.
- ❖ Visitors to the Verde Valley evidenced a high level of satisfaction with their trip. Overall satisfaction levels with visitor experiences in the Verde Valley achieved an 8.5 out of a possible 10.
- ❖ Visitors to the Verde Valley had an estimated \$529 million in direct expenditures, which resulted in an indirect economic impact of \$103.8 million, and induced impact of \$139 million for a total economic impact of \$772 million. Indirect business taxes based on direct expenditures produced an additional \$64 million and the total economic impact supported 9,490 direct jobs or 12,130 direct and indirect jobs.

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Introduction

The tourism and hospitality industries today are vitally important to the economic growth and stability of the U.S. economy. Tourism is the nation's top services export, one of the top three industries, and one of the nation's largest employers. Yet, despite the industry's enormous contributions to economic development, states and communities face greater competition than ever before for the tourism dollar. Thus, research has emerged as a crucial tool to help guide local communities in their tourism promotion and marketing efforts.

Advertising is expensive and dollars are scarce; promotional efforts need to be targeted to the most receptive and productive market segments. The more information a region or community has about its current visitors and their travel patterns, the more accuracy can be applied in developing niche markets and targeting future visitors. What are the demographics of potential visitors, where do they come from, what products attract them to an area, what is the level of satisfaction with the visitor experience, how can it be improved, how can stays be extended, and what do industry insiders see as emerging trends?

The Verde Valley is both an established and an emerging tourism region. It is home to world-famous tourist attractions such as the red rock formations of Sedona and the archeological wonders of pre-historic Native American sites preserved at Tuzigoot and Montezuma Castle national monuments. The Verde Valley is also home to a variety of unique natural resources, containing portions of both the Coconino and Prescott National Forests, and it is the origin of the Verde River, one of Arizona's few remaining perennial rivers. The Verde Valley has a vibrant history and culture, encompassing Hispanic, Native American and Anglo descendants of miners,

ranchers and tribes. Six Arizona State Parks in the area protect and preserve this history for future generations. Uniquely, Sedona also hosts visitors in search of metaphysical enlightenment or sophisticated shopping and spa experiences. Visitors to Jerome enjoy browsing in the many art galleries and bakeries of an old mining ghost town saved by tourism.

Many visitors are aware of the striking natural beauty of Sedona and the surrounding red rock buttes and canyons, but are unaware of the historic importance of the communities of Clarkdale, Cottonwood and Camp Verde. One of the primary objectives of this regional tourism study was to collect tourism visitor data not only for the well known tourist community of Sedona, but to gather tourism data about visitors to the other Verde Valley communities of Camp Verde, Cottonwood, Clarkdale and Jerome as well. The data gathered in this survey forms a picture of tourism throughout the region and can help shape the advertising and marketing efforts of the individual communities in the Verde Valley. With the data from this tourism survey and other regional planning data (such as the regional study completed as part of the ACERT process) the communities of the Verde Valley are better able to pursue regional marketing efforts and secure funding for regional tourism promotion. A regional marketing approach could be very beneficial to a geographic area such as the Verde Valley. As a part of this approach the various communities in the region, working together, can build on popular products and attractions, promote longer overall stays in the region, and increase the economic impact of tourism throughout the Valley. Finally, this study will allow Verde Valley tourism leaders to aggressively pursue sources of outside funding for tourism promotion – such as the TEAM (Teamwork for Effective Arizona Marketing) program funds administered by the Arizona Office of Tourism – and use these marketing dollars to further a regional vision.

Research Methods

In October, 2006 the Arizona Office of Tourism (AOT) contracted with the AHRRC to conduct research on tourism in the Verde Valley as part of an ongoing plan to gather regional and community-based tourism data. A meeting was convened by AOT in Camp Verde where representatives from all the major communities of the Verde Valley attended to hear about the project. In attendance at the meeting to discuss the tourism survey were representatives of the towns of Camp Verde, Cottonwood, Clarkdale and Sedona. Jerome tourism officials were invited to participate but did not send a representative to the initial planning meeting. AOT indicated that it was willing to fund the community surveys if the communities were willing to provide volunteers to collect tourism data according to a prescribed survey schedule, and to promote the project in their respective communities. All communities present agreed to participate and were eager for the opportunity to receive community-specific tourism data.

The Verde Valley tourism survey was designed by the professional staff at the AHRRC in conjunction with AOT and the participating Verde Valley communities. The instrument was developed in Teleform™, a computerized scanning program, to afford rapid data capture of the completed questionnaires. The two-page survey was developed to obtain information on visitors' activities in the county, communities visited, reasons for visiting, and expenditures while in the various communities. The surveys were coded to allow community level data to be extracted, and were collected according to a seasonally adjusted stratified sample based on community attractions. The collection schedule was randomized to ensure that surveys were distributed on both weekdays and weekends and that no two communities were surveying at the same time to reduce the possibility of overlap – or surveying the same visitor twice. Each

community was provided a fixed number of surveys to be distributed according to a predetermined survey schedule.

The survey was designed to be self-administered, i.e., lodging or attraction staff handed the survey to visitors who completed and returned it to staff. Completed surveys were forwarded to NAU on a quarterly basis. The identified tourism leader for each community was responsible for distributing the surveys to the various lodging and attraction entities in their communities, according to the survey schedule. The tourism leaders were invaluable in this process as they also encouraged properties to participate in the survey and returned data to NAU. Despite the best efforts of the tourism champions, some communities were unable to keep up with the data collection schedule, achieving fewer than the required monthly targets or sometimes dropping out for the month. Despite a lower than expected response rate, the survey can be considered a success. A total of 1284 surveys were collected for the year, for a response rate of 26.8 percent. While not as high as would be preferred the number of respondents to the Verde Valley tourism survey is adequate to examine most aspects of tourist visits to the region, although results for communities with low survey returns should be interpreted with caution. The remainder of this report presents combined results for the entire Verde Valley; individual communities will be provided with data tables to provide a picture of their specific visitors.

Data for the Verde Valley survey were collected in the communities of Sedona, Cottonwood, Clarkdale, Camp Verde and Jerome. Sedona (55.5%) had the largest sample of visitors, followed by Cottonwood (19.0%), Camp Verde (12.8%), Clarkdale (11.0%), and Jerome (1.8%). See Table 1.

Table 1. Community the survey was administered in

Community the survey was administered in		
	Count	Column N %
Sedona	712	55.5%
Cottonwood	244	19.0%
Camp Verde	164	12.8%
Clarkdale	141	11.0%
Jerome	23	1.8%
Total	1284	100.0%

Surveys were collected one week per month, for each month of the year-long study. While Sedona collected the most surveys in every time period, during the third and fourth quarter the other communities combined for a larger percentage of the overall total. See Table 2.

Table 2. Community the survey was administered in by calendar quarter?

	Calendar quarter of survey			
	Quarter #1 - January - March	Quarter #2 - April - June	Quarter #3 - July - September	Quarter #4 - October - December
Sedona	52.4%	77.8%	42.9%	44.3%
Jerome	3.6%	.3%	.5%	1.9%
Camp Verde	16.7%	3.0%	14.1%	16.0%
Cottonwood	18.1%	14.1%	25.9%	21.4%
Clarkdale	9.3%	4.8%	16.6%	16.4%
Total	100.0%	100.0%	100.0%	100.0%

Sample Description

Demographics are an important part of any visitor survey, as they describe visitor age, gender, party composition and household income. Together these demographic variables paint a portrait of the typical visitors. This section provides information on overall visitors to the Verde Valley, focusing on their age, gender, party composition, and household income.

Gender

More males (60.2%) than females (39.8%) were captured in the sample, which is not to say that more males visit the Verde Valley than females. It is simply that more males were approached and agreed to complete the survey. See Table 3.

Table 3. What is your gender?

What is your gender?		
	Count	Column N %
Male	702	60.2%
Female	464	39.8%
Total	1166	100.0%

Age

How old is the average visitor to the Verde Valley? We know that age is a central determinant of tourism product offerings; older visitors are generally less likely to attend rock concerts or go rock climbing, whereas younger visitors are less likely to shop for antiques; however, as with any generalization there may be exceptions.

The average (mean) age of visitors is 52.8 years and the median is 55.0 years. These visitors to the Verde Valley are somewhat older than overall state visitors who average 47 years. State averages used for comparisons in this study were obtained from the Arizona Office of Tourism report, “Arizona 2006 Tourism Facts: Statewide and regional Tourism Indicators – Year End Summary.” The median age (or mid-point of the distribution) is 55.0 years, or slightly higher than the average age indicating the prevalence of this age group. In fact when the 51 to 60 year age group, essentially Baby Boomers, are combined they account for 26 percent of all visitors. Younger visitors, those 30 years of age, and under accounted for a relatively minor 7.0 percent of the sample. See Table 4, and Figure 1.

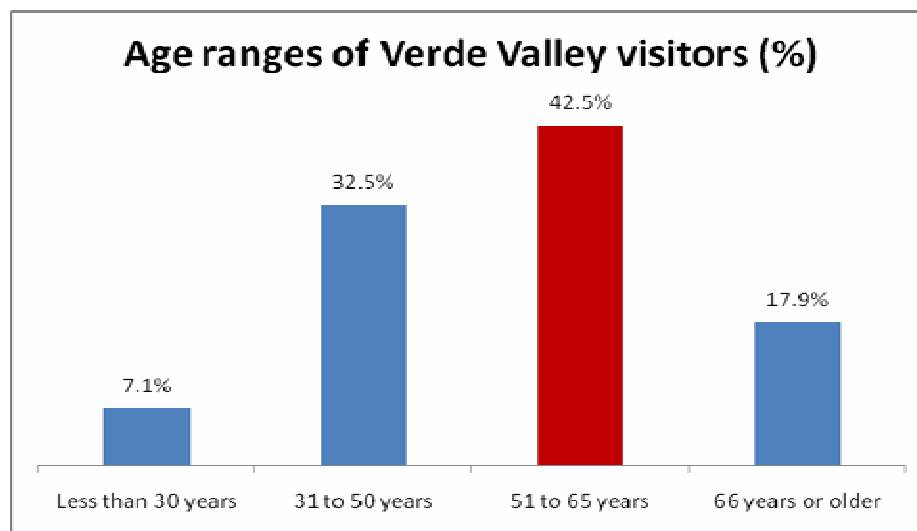
Table 4. Age ranges of visitors

Age of visitors (recoded to age ranges)		
	Count	Column N %
20 and under	11	1.0%
21 - 25 years	30	2.8%
26 - 30 years	34	3.2%
31 - 35 years	70	6.6%
36 - 40 years	80	7.6%
41 - 45 years	87	8.2%
46 - 50 years	107	10.1%
51 - 55 years	136	12.9%
56 - 60 years	139	13.1%
61 - 65 years	175	16.5%
66 - 70 years	110	10.4%
71 - 75 years	41	3.9%
76 years and older	38	3.6%
Total	1058	100.0%

Mean = 52.8 years

Median = 55.0 years

Figure 1. Age Ranges of Verde Valley visitors?



Gender by Age

Are there any age differences between male and female visitors? Male visitors are slightly younger (52.1 years) than females (53.9 years). More males than females appeared in the younger age ranges, from 20 to 40 years of age, and 23.4 percent more males than females appeared in the 46 to 50 year age range. On the other hand, more females were represented in older age ranges from 51 to 65 years and 71+ years. See Table 5, and Figure 2.

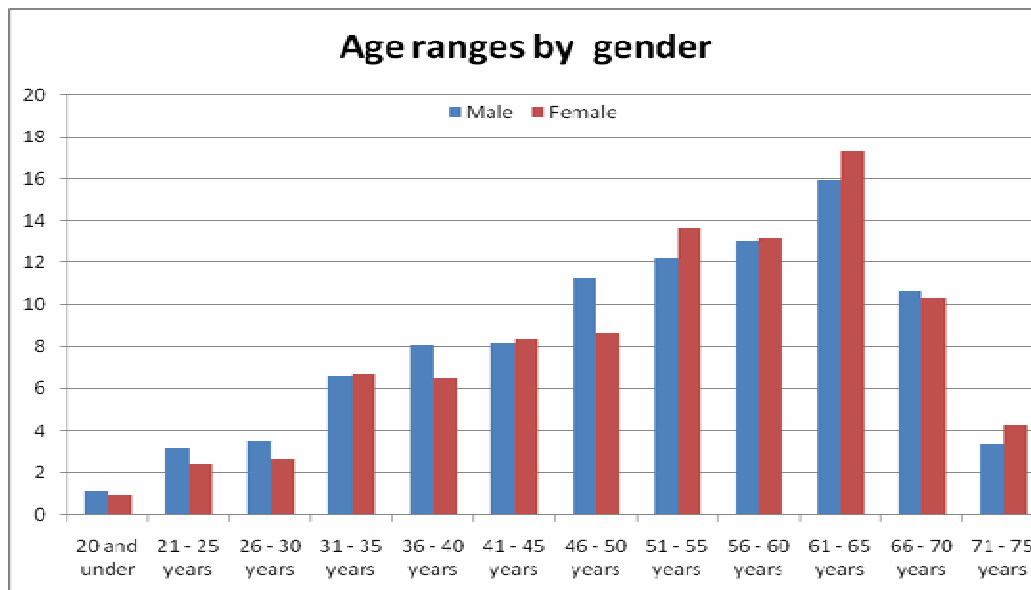
Table 5. Age Range of visitors by gender?

	Gender by age of visitors recoded to ranges	
	What is your gender	
	Male	Female
20 and under	1.1%	1.0%
21 - 25 years	3.2%	2.4%
26 - 30 years	3.5%	2.6%
31 - 35 years	6.6%	6.7%
36 - 40 years	8.1%	6.5%
41 - 45 years	8.2%	8.4%
46 - 50 years	11.3%	8.6%
51 - 55 years	12.2%	13.7%
56 - 60 years	13.0%	13.2%
61 - 65 years	15.9%	17.3%
66 - 70 years	10.6%	10.3%
71 - 75 years	3.4%	4.3%
76 years and older	2.7%	5.0%
Total	100.0%	100.0%

Male = 52.1 years

Female = 53.9 years

Figure 2. Age ranges by gender?



Travel Party

What is the average visitor party size? On average, there were 1.4 women and 1.3 men in the average party size of 2.6 people. When parties included children, the average number of children was a relatively high 1.8 children per party. However, only 12.9 percent of parties indicated that they traveled to the Verde Valley with children. This is lower than the state average of 32 percent and the US average of 42 percent, suggesting the Verde Valley is more an adult than a family destination. The average party size of visitors to the Verde Valley matches the state overall average party size of 2.6 persons. The survey sample accounts for 3,100 individuals. See Table 6.

Table 6. How many persons including yourself are in the party?**How many people including yourself are in your travel party?**

	Mean	Median	Valid N
Number of women in party?	1.4	1.0	1088
Number of men in party?	1.3	1.0	992
Number of children under 18 years of age in party?	1.8	2.0	166

Visitors who indicated that they were traveling as family only, had the highest number of two person parties (48.5%), followed by friends only (9.6%) groups. Organized tour groups had the largest visitor parties, of 30 to 50 persons consistent with bus tourists. See Table 7.

Table 7. Party size by who is traveling with you on this trip?**Party size by who is traveling with you on this trip?**

	Who is traveling with you on this trip?						
	Family and friends	Family only	Friends only	Nobody traveling alone	Organized Tour Group	Business associates	Total
1	.5%	.9%	.7%	.2%	5.0%	.3%	7.6%
2	6.2%	48.5%	9.6%	.0%	1.8%	.5%	66.9%
3	2.7%	6.2%	1.0%	.0%	.1%	.0%	10.1%
4	2.7%	6.2%	.7%	.0%	.1%	.1%	9.8%
5	.3%	2.0%	.1%	.0%	.0%	.1%	2.6%
6	.6%	.6%	.0%	.0%	.0%	.0%	1.1%
7	.0%	.0%	.1%	.0%	.0%	.0%	.1%
8	.3%	.1%	.0%	.0%	.0%	.0%	.5%
9	.3%	.0%	.0%	.0%	.0%	.2%	.6%
10	.1%	.2%	.0%	.0%	.0%	.1%	.5%
30	.0%	.0%	.0%	.0%	.1%	.0%	.1%
50	.0%	.0%	.0%	.0%	.2%	.0%	.2%
Total	13.8%	64.7%	12.2%	.4%	7.3%	1.4%	100.0%

Party Type

The majority of survey respondents traveled as family only groups (63.4%), followed by family and friends (14.9%), and friends only (12.1%). Organized tours accounted for a further 7.5 percent, followed by business associates (1.6%) and those traveling alone (0.5%). See Table 8.

Table 8. Who is traveling with you on this trip?

Who is traveling with you on this trip?		
	Count	Column N %
Family only	732	63.4%
Family and friends	172	14.9%
Friends only	140	12.1%
Organized Tour Group	86	7.5%
Business associates	18	1.6%
Nobody traveling alone	6	.5%
Total	1154	100.0%

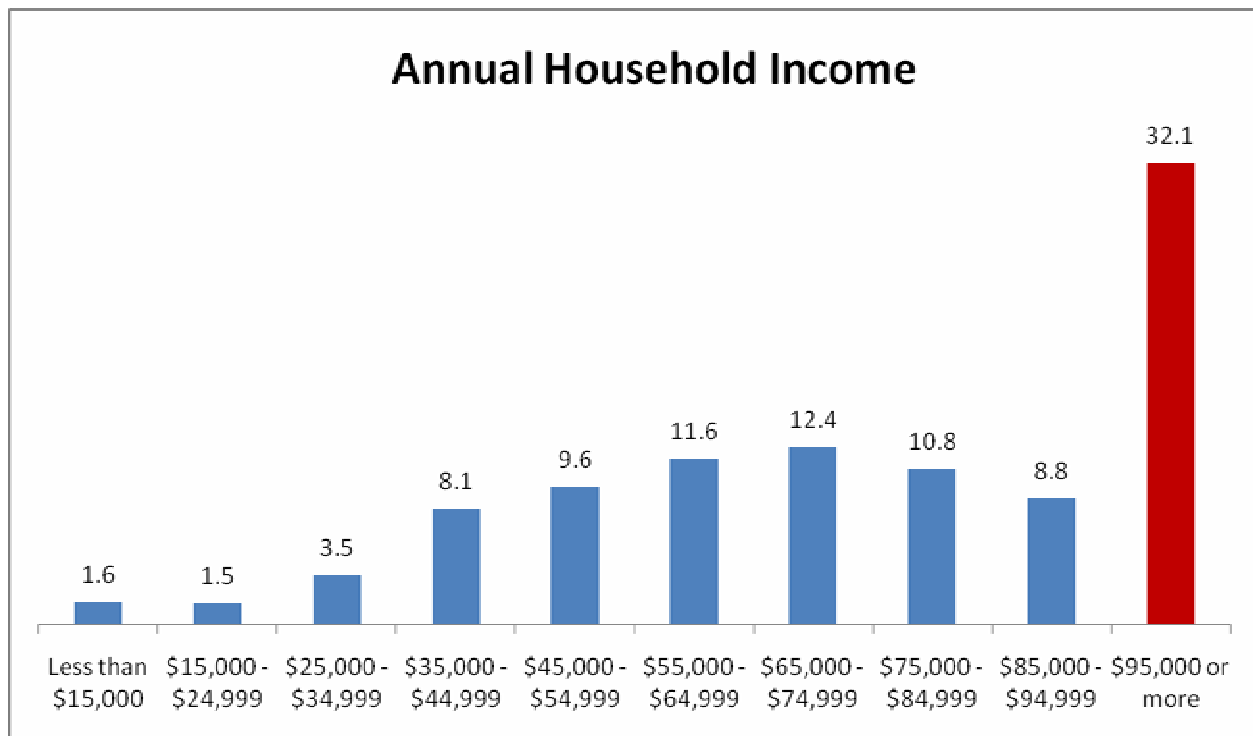
Annual Income

The average household income of visitors to the Verde Valley is \$72,310, and the median annual income is \$57,398. This average income figure is slightly lower than that for the non-resident visitors to Arizona overall at \$78,800 which may be accounted for by the older average age of Verde Valley visitors. The average annual income of visitors to the Verde Valley is, however, higher than average annual income of Arizona *resident* travelers at \$65,300. See Table 9, and Figure 3.

Table 9. What is your annual household income?

What is your annual household income?		
	Count	Column N %
Less than \$15,000	16	1.6%
\$15,000 - \$24,999	15	1.5%
\$25,000 - \$34,999	34	3.5%
\$35,000 - \$44,999	79	8.1%
\$45,000 - \$54,999	94	9.6%
\$55,000 - \$64,999	113	11.6%
\$65,000 - \$74,999	121	12.4%
\$75,000 - \$84,999	106	10.8%
\$85,000 - \$94,999	86	8.8%
\$95,000 or more	314	32.1%
Total	978	100.0%

Figure 3. Annual Household Income?



Verde Valley Survey Results

Primary Destination

Is the Verde Valley a primary destination for visitors, or simply one stop on a longer journey?

More than two-thirds (69.3%) of all visitors indicated that the Verde Valley was the primary destination of their trip, while fewer than one-third visitors (30.7%) indicated that the Verde Valley was not their main destination. See Table 10.

Table 10. Is the Verde Valley the primary destination of your trip?

Is the Verde Valley the primary destination of your trip?

	Count	Column N %
Yes	848	69.3%
No	375	30.7%
Total	1223	100.0%

Those respondents who said the Verde Valley was not their primary destination were asked to indicate where they were bound on the trip. Two-fifths (43%) indicated that they were visiting other places in Arizona and passing through the Verde Valley, while a further 31.2 percent were visiting Northern Arizona, including Flagstaff, Williams and the Grand Canyon National Park. The remainder (25.7%) indicated that they were visiting Arizona on the way to other states, primarily California, Colorado and New Mexico. See Table 11.

Table 11. If no, what is the primary destination of your trip?

Other destinations	Count	Column N%
Arizona overall	174	43.1%
Northern Arizona	126	31.2%
Other states	104	25.7%
Total	404	100.0%

What Verde Valley Communities do you intend to visit?

Do visitors to the Verde Valley tend to visit one primary community, such as Sedona, or do they travel throughout the Verde Valley to see the attractions in the various communities? The vast majority of respondents visited Sedona (84.9%), followed by Jerome (48.8%) and Cottonwood (45.5%), while fewer respondents visited Camp Verde (26.7%) or Clarkdale (25.0%). Thus, while visitation is highly focused on Sedona, other Verde Valley communities do get significant visitation as well. See Table 12.

Table 12. Please mark all Verde Valley communities you plan to visit on this trip.

Please mark all Verde Valley communities you plan to visit on this trip?

	Count	Column N %
Sedona	884	84.9%
Jerome	508	48.8%
Cottonwood	474	45.5%
Clarkdale	260	25.0%
Camp Verde	278	26.7%
Total	1041	100.0%

What was the pattern of visits to the various communities? Visitors to Camp Verde were most likely to also visit Sedona (75.8%) and Cottonwood (69.7%); visitors to Clarkdale also visited Sedona (81.2%) and Cottonwood (82.7%) in large numbers. Visitors to Cottonwood were most likely to also visit Sedona (80.1%) and Jerome (69.2%), whereas visitors to Jerome also visited Sedona (87.8%) and Cottonwood (64.5%). Finally, Sedona visitors were least likely to go to Camp Verde or Clarkdale (23.8% respectively). Clearly, Sedona is at the top of this hierarchy of visitation, followed by Jerome and Cottonwood.

Primary Purpose of your visit to the Verde Valley?

People visit communities for a variety of reasons, including leisure, business, or a combination of both, while others are simply passing through en route to somewhere else. What are the primary reasons visitors come to the Verde Valley? Vacation-leisure (53.5%) was the most popular purpose of the visit, followed by day trips (17.5) and weekend visits (13.2%). The top three reasons are all leisure-oriented, having little to do with visiting family members or business. Thus, the Verde Valley (9.9%) rates lower than the Northern Arizona region (16.0%) for visiting family and friends and far below the state average of 40 percent; instead, the Verde Valley is a leisure or getaway destination. Fewer than one-tenth of respondents were passing through (8.2%), and even fewer were visiting the Verde Valley for a combination of business and pleasure (3.7%) or business only (3.2%). See Table 13.

Table 13. What best describes the primary purpose of your trip to the Verde Valley?

Indicate item that best describes the primary purpose of your trip to the Verde Valley?	Count	Column N %
Vacation-leisure	678	53.5
Day trip	222	17.5
Weekend visit	167	13.2
Visiting friends or relatives	126	9.9
Just passing through	104	8.2
Combination of business and leisure travel	47	3.7
Business	41	3.2
Total	1385	

Does not sum to 100% because of multiple responses.

What is your primary mode of transportation?

How do visitors get to the Verde Valley? One would assume that almost all visitors arrived in some form of vehicular transportation, but of what type? Private auto (50.9%) accounted for half of all visits followed by rental cars (36.1%). The survey unfortunately did not ask where the rental cars were picked up, inside the state or out-of-state. No other single category accounted for more than one-tenth of all travel modes. RV/Camper accounted for slightly less than one-tenth (8.8%) of all visits, with air service accounting for 1.7 percent, “other” 0.9 percent and tour bus 0.6 percent of all visitors. See Table 14.

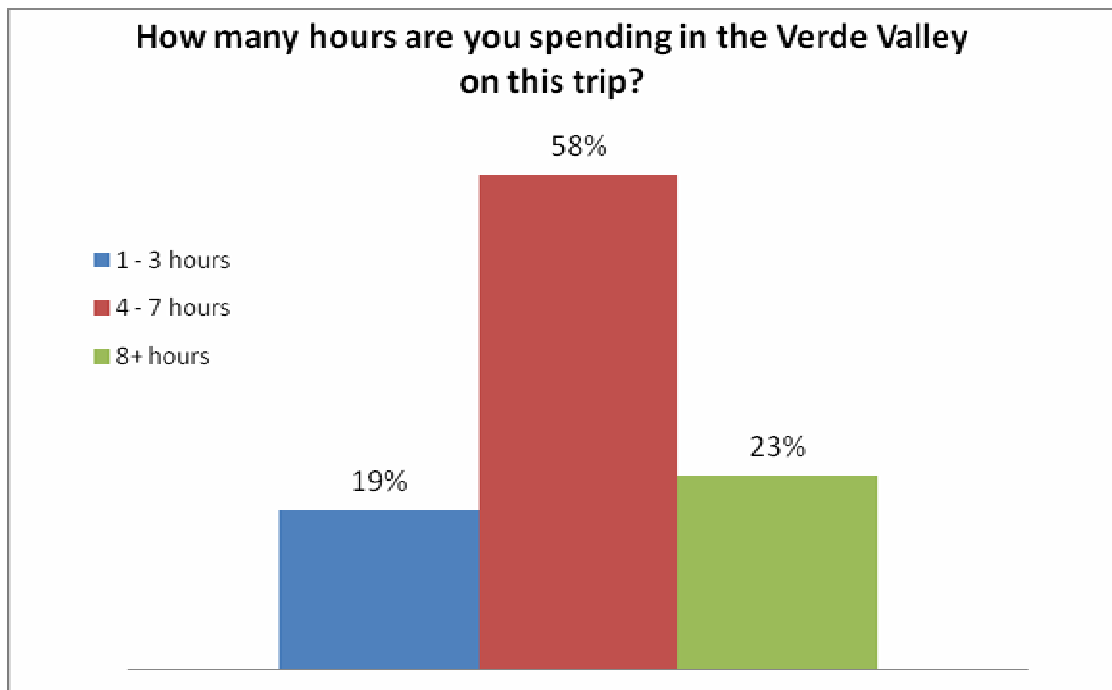
Table 14. What is your primary mode of transportation?

What is your primary mode of transportation?		
	Count	Column N %
Private auto	650	50.9%
Rental car	461	36.1%
RV/Camper	112	8.8%
Air service	22	1.7%
Motorcycle	13	1.0%
Other	11	.9%
Tour Bus	8	.6%
Total	1277	100.0%

How much time in total did you spend in the Verde Valley?

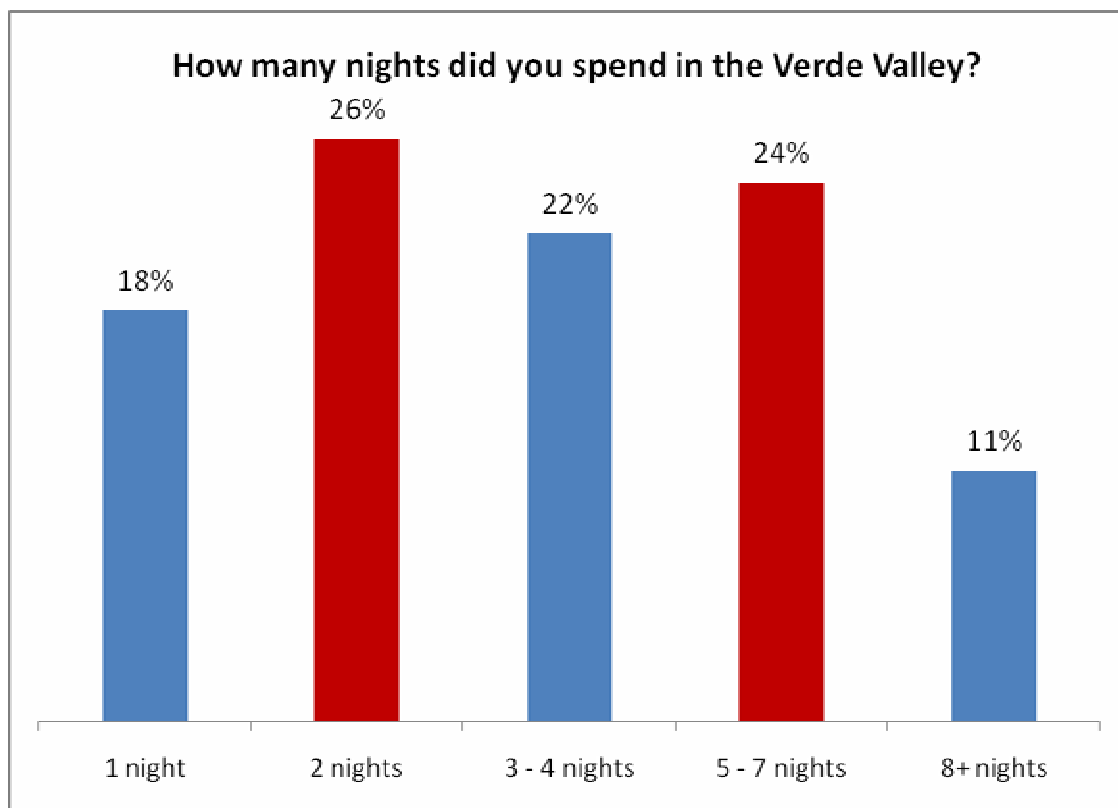
Length of stay is always an important factor in any tourist study. How long did visitors spend in the region? Respondents were asked to indicate whether they spent either hours or nights in the Verde Valley. A majority of respondents (66.1%) stayed overnight in the Verde Valley, while one third (33.9%) of respondents were classified as day visitors. For those who were day visitors, a majority (58%) spent between 4 and 7 hours in the region, 23 percent spent 8+ hours, while 19 percent spent between 1 and 3 hours. The average length of stay for day visitors is 5.7 hours. See Figure 4.

Figure 4. How many hours did you spend in the Verde Valley?



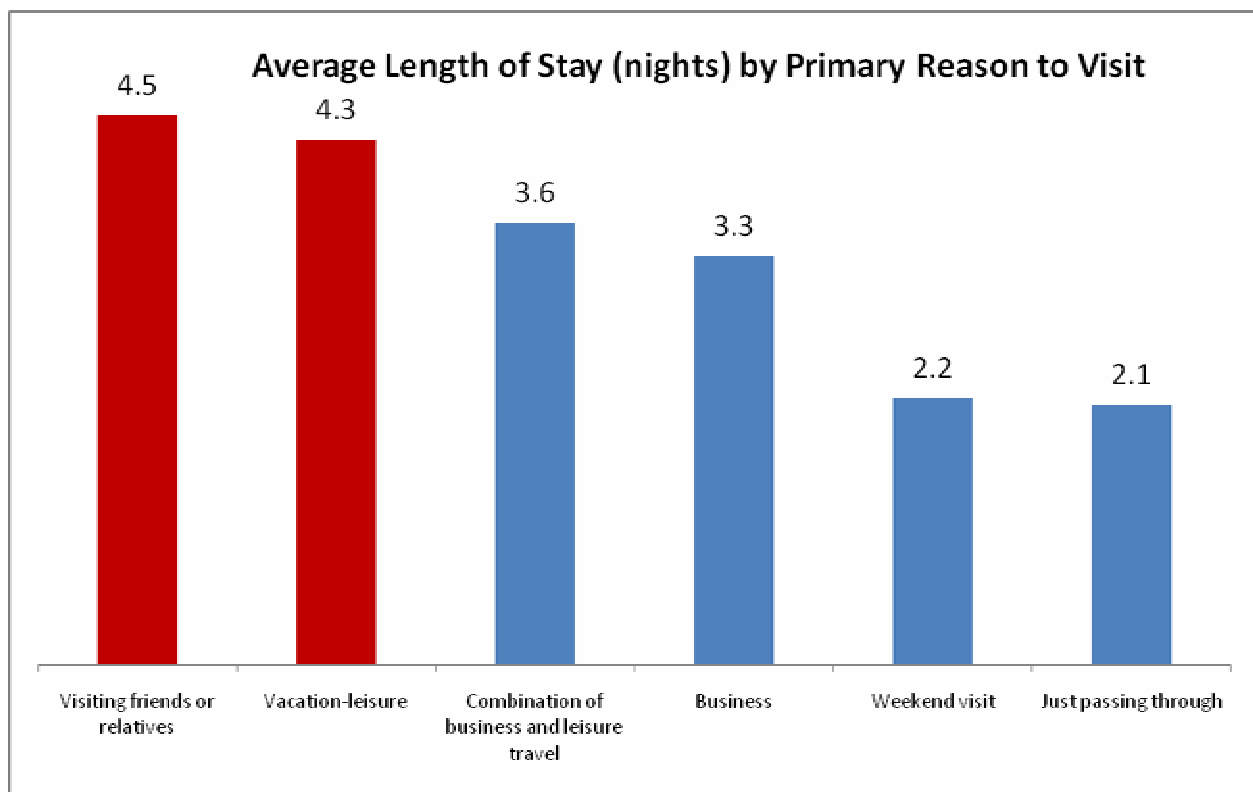
As noted previously, the vast majority (66%) of respondents spent at least one night in the Verde Valley. The average length of stay derived by weighted averages is 3.7 days. The largest single cohort of visitors (26%) stayed for two nights while the next largest group of visitors (24%) stayed between 5 and 7 nights. Visitors to the Verde Valley have longer overnight stay patterns than both the Northern Arizona region (2.8 days) or the state overall (3.4 days) in 2006. See Figure 5.

Figure 5. How many nights did you spend in the Verde valley?



Which visitors stay the longest in the Verde Valley? Do business travelers stay longer than lesiure travelers? The average length of stay of each specific visitor group shows the relative strength of that market segment in driving overall visits to the region. Respondents who were visiting friends and relatives, who comprised only 9.9 percent of all visitors, in fact had the longest average length of stay, 4.5 days. The next longest length of stay was for vacation-leisure visitors (4.3 days) followed by combined business and leisure travel (3.5 days). This is important because vacation-leisure travel accounted for more than half (53.5%) of all visitors to the region and this segment had slightly longer stays than the state average of 3.4 days. See Figure 6.

Figure 6. Average length of stay by primary reason of visit?



What type of lodging did you use during your stay?

Now that we know that 66.1 percent of all respondents stayed overnight in the Verde Valley region and that the average visitor spends at least 2 days in the region, the next important question is where do these visitors stay? The largest single group of visitors (40.8%) stayed in a hotel or motel, while almost one-fifth (19.2%) stayed overnight in a timeshare property. A surprising 13.0 percent of respondents stayed in a Bed and Breakfast in the Verde Valley, while 13.6 percent stayed in a campground or RV park. Resort stays accounted for 10 percent of all respondents, followed by condominiums (1.8%) and second homes (1.3%). The “other” category accounted for a further 5.5 percent of all respondents. When asked to specify, “other” categories, responses included staying with friends and family, private homes, boutique hotel properties, and staying on Forest Service lands. See Table 15.

Table 15. What type of lodging did you stay in?

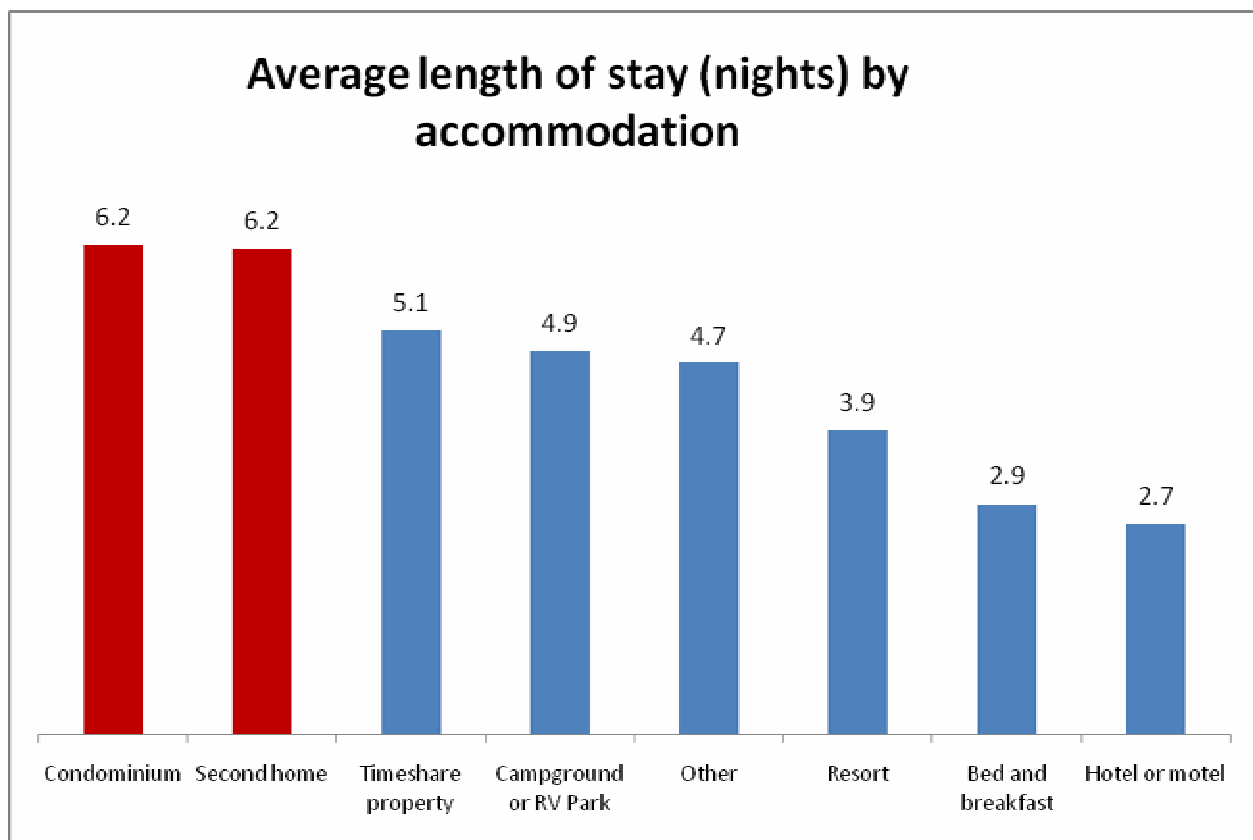
If staying overnight in the Verde Valley what type of lodging are you using?

	Count	Column N %
Hotel or motel	410	40.8%
Timeshare property	193	19.2%
Campground or RV Park	137	13.6%
Bed and breakfast	131	13.0%
Resort	101	10.0%
Other	55	5.5%
Condominium	18	1.8%
Second home	13	1.3%
Total	1006	100.0%

Does not sum to 100% due to multiple responses.

Which accommodations produced the longest average length of stay? The data indicated that condominiums and second homes had the longest average length of stay (6.2 nights), but that timeshare properties accounted for the third longest length of stay, at 5.1 nights. Average lengths of stay in more traditional hospitality properties reflected lower average lengths of stay as follows: with resorts (3.9 nights), bed and breakfast (2.9 nights) and hotel or motel (2.7 nights). This stands to reason as long-stay properties such as condominiums or time shares may mandate longer stays than hotels, motels or resorts. See Figure 7.

Figure 7. Average length of stay by accommodation type



In what city did you spend last night?

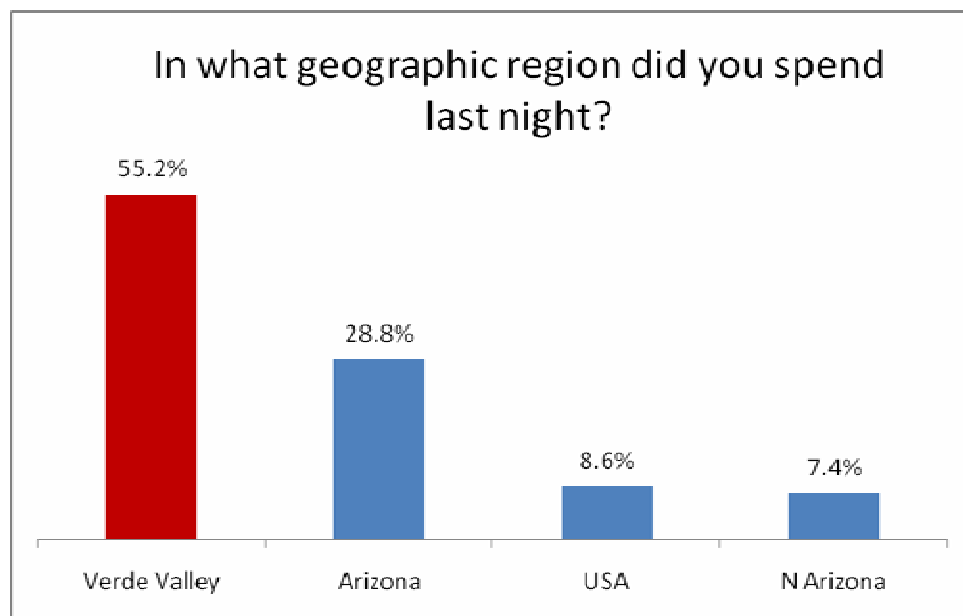
To determine travel patterns visitors were asked to specify where they spent last night. More than half of visitors (50.8%) stayed in the Verde Valley the night before they filled out the survey, in the communities of Sedona (35.0%), Cottonwood (12.7%) and Camp Verde (3.1%). Phoenix (14.6%), Scottsdale (3.7%), Tucson (1.8%) and Mesa (1.2%) demonstrated the origins of visitors traveling from Southern Arizona, while Flagstaff (4.9%) and Grand Canyon National Park (1.4%) account for visitors from Northern Arizona. Las Vegas (1.5%) visitors account for a majority of out-of-state visitors to the Verde Valley. The complete list of communities can be found in Appendix B. Only communities totaling more than 1 percent of the total are included in Table 16, and these communities account for 80 percent of all responses. See Table 16.

Table 16. In what city did you spend last night?

In what city did you spend last night?	Count	Column N %
SEDONA	368	35.0
PHOENIX	153	14.6
COTTONWOOD	133	12.7
FLAGSTAFF	51	4.9
SCOTTSDALE	39	3.7
CAMP VERDE	33	3.1
TUCSON	19	1.8
LAS VEGAS, NV	16	1.5
GRAND CANYON NP	15	1.4
MESA	13	1.2
Sub total	840	79.9

A majority (55.2%) of visitors were already staying in the Verde Valley at the time they completed the survey. A further one-fourth (28.8%) of visitors stayed in other areas of Arizona (except Northern Arizona) with 8.6 percent of visitors staying in other US states (namely California and Nevada). A smaller number of visitors (7.4%) stayed in Northern Arizona including Flagstaff, Williams and Grand Canyon National Park.

Figure 8. In what geographic region did you spend last night?



In what city will you stay tonight?

More visitors stayed in the Verde Valley for the current night than stayed the night before – 64.1 percent stayed in the Verde Valley “tonight” compared to 50.8 percent for the night before.

Once again a majority of visitors stayed in the communities of Sedona (45.3%), Cottonwood (14.8%) and Camp Verde (4.0%). Verde Valley communities in the survey received more over-

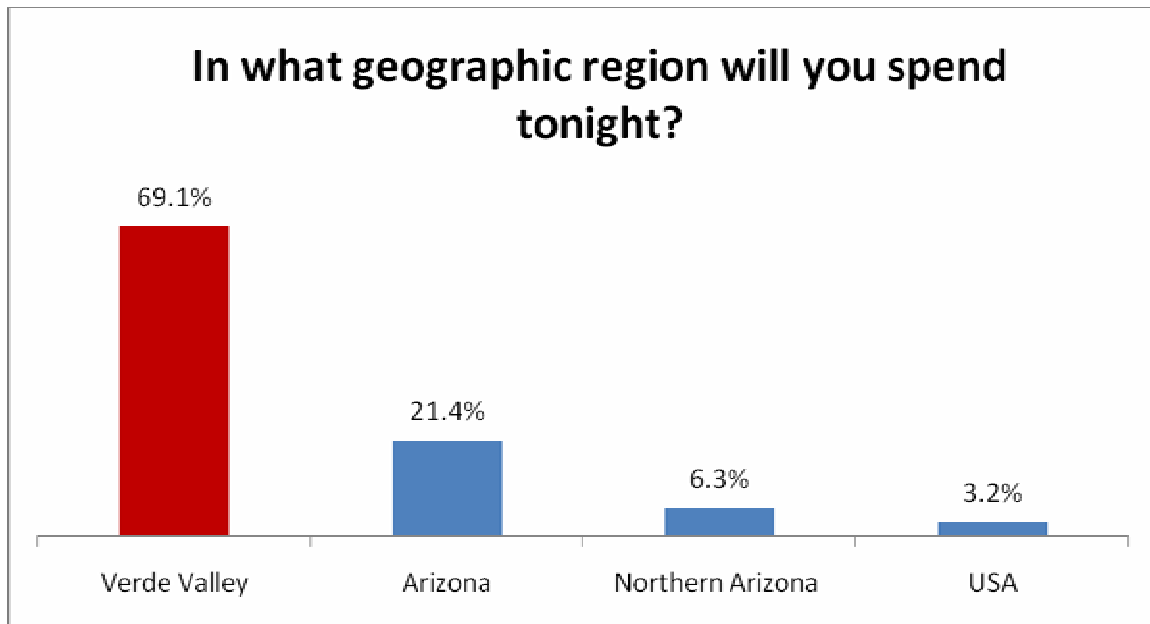
night stays than in the previous question. Phoenix (8.8%), Scottsdale (2.9%), Tucson (1.5%) and Mesa (1.2%) accounted for visitors from Southern Arizona, while Flagstaff (4.0%) and Grand Canyon National Park (1.3%) accounted for visitors from Northern Arizona. No out-of-state destinations are apparent in the top communities. The complete list of communities can be found in Appendix B. Only communities totaling more than 1 percent of the total are included in Table 17, and these communities account for 85 percent of all responses. This is evidence that most visitors were staying in the Verde Valley after they took the survey. See Table 17.

Table 17. In what city will you spend tonight?

In what city will you spend tonight?	Count	Column N %
SEDONA	459	45.3
COTTONWOOD	150	14.8
PHOENIX	89	8.8
FLAGSTAFF	41	4.0
CAMP VERDE	41	4.0
SCOTTSDALE	29	2.9
TUCSON	15	1.5
PRESCOTT	13	1.3
GRAND CANYON NP	13	1.3
MESA	12	1.2
Sub total	862	85.0

Two-thirds (69.1%) of all visitors were already staying in the Verde Valley at the time they completed the survey. A further one-fifth (21.4%) of visitors stayed in other areas of Arizona (except Northern Arizona) and 6.3 percent of visitors stayed in Northern Arizona including Flagstaff, Williams and Grand Canyon National Park. The remainder, 3.2 percent, stayed in other US states, with the majority of these in California and Nevada. See Figure 9.

Figure 9. In what geographic region will you spend tonight?



Geographic Origins of Verde Valley visitors

Where do visitors from the Verde Valley originate? We know from the previous data that a majority of visitors were already staying in the Verde Valley and that visitors were also coming from the Phoenix metro area, Northern Arizona and out-of-state. Respondents were asked to include the zip code of their permanent residence, which provides evidence of geographic origin. The largest single group of visitors to the Verde Valley came from Arizona (31.0%) followed by

California (13.7%), Wisconsin (5.4%), Illinois (4.5%) and New York (3.4%). These findings match those of Arizona generally, in which California, Illinois and New York are among the top 10 originating states for overnight visits. See Table 18.

Table 18. Origins of visitors to the Verde Valley?

Origins of visitors to the Verde Valley?	Count	Column N %
Arizona	338	31.0
California	155	13.7
Wisconsin	61	5.4
Illinois	51	4.5
New York	39	3.4
Washington	35	3.1
Ohio	32	2.8
Colorado	31	2.7
Michigan	31	2.7
Texas	29	2.5
Pennsylvania	29	2.5
New Jersey	29	2.5
Florida	27	2.4
Massachusetts	26	2.3
Oregon	18	1.6
Nevada	18	1.6
Virginia	16	1.4
Connecticut	15	1.3
New Mexico	11	1.0

Table 18. Origins of visitors to the Verde Valley?...continued

Origins of visitors to the Verde Valley?	Count	Column N %
Indiana	11	1.0
Kentucky	10	0.9
North Carolina	10	0.9
Maryland	10	0.9
Iowa	8	0.7
Rhode Island	8	0.7
South Dakota	7	0.6
Montana	6	0.5
Alabama	6	0.5
New Hampshire	6	0.5
Wyoming	5	0.4
South Carolina	5	0.4
Utah	4	0.4
Idaho	4	0.4
Arkansas	4	0.4
Kansas	4	0.4
Alaska	3	0.3
Oklahoma	3	0.3
Louisiana	3	0.3
Nebraska	3	0.3
Georgia	3	0.3
District of Columbia	3	0.3
Vermont	3	0.3
Maine	3	0.2
Hawaii	2	0.1
North Dakota	2	0.1
Delaware	2	0.1
Total	1137	100.0

Arizona visitors to the Verde Valley

Since almost one third (31%) of Verde Valley visitors originate in Arizona just where do these visitors come from. It is not surprising that the Phoenix metro area provides a majority of Arizona visitors to the Verde Valley. The Phoenix metro area (Maricopa County) accounted for more than half (57.3%) of all Arizona visitors to the Verde Valley. Tucson (11.5%) and Flagstaff (5.3%) were the only non-Phoenix metro communities accounting for more than 5 percent of Arizona visitors to the Verde Valley. See Table 19.

Table 19. Geographic origin of Arizona visitors to the Verde Valley

Origins of Arizona visitors to the Verde Valley?	Count	Column N %
Phoenix	57	17.6
Tucson	37	11.5
Chandler	30	9.3
Fountain Hills	24	7.4
Mesa	21	6.5
Glendale	19	5.9
Flagstaff	17	5.3
Sun City	13	4.0
Camp Verde	9	2.8
Tempe	7	2.2
Douglas	7	2.2
Apache Junction	7	2.2
Goodyear	6	1.9
Quartzsite	5	1.5
Peoria	4	1.2
Clarkdale	4	1.2
Black Canyon City	4	1.2
Prescott Valley	3	0.9
Prescott	3	0.9

Table 19. Geographic origin of Arizona visitors to the Verde Valley..continued

Origins of Arizona visitors to the Verde Valley?	Count	Column N %
Leupp	3	0.9
Greenhaven	3	0.9
Cottonwood	3	0.9
Winkelman	2	0.6
Wickenburg	2	0.6
Taylor	2	0.6
Sedona	2	0.6
Payson	2	0.6
Kykotsmovi Village	2	0.6
Gilbert	2	0.6
Fort Mohave	2	0.6
Chino Valley	2	0.6
Buckeye	2	0.6
Tuba City	1	0.3
Thatcher	1	0.3
Safford	1	0.3
Pinon	1	0.3
Paulden	1	0.3
Parks	1	0.3
Munds Park	1	0.3
Lake Havasu City	1	0.3
Kayenta	1	0.3
Hotevilla	1	0.3
Grand Canyon	1	0.3
Corona de Tucson	1	0.3
Chinle	1	0.3
Cave Creek	1	0.3
Cameron	1	0.3
Avondale	1	0.3
Arivaca	1	0.3
Total	323	100

International visitors to the Verde Valley

Finally, international visitors were asked to include their country of origin. Arizona attracts international visitors from all over the world, attracted by the natural wonders of the Grand Canyon and Sedona's red rocks as well as cowboy and Native American history. Canadians, who frequently migrate during the cold northern months earning the monikers "snowbirds", dominated accounting for more than half (57.7%) of foreign visitors to the Verde Valley. The next largest group of visitors was from the United Kingdom (17.7%) followed by Germany (6.9%). The top international visitor groups to the Verde Valley are similar to Arizona international visitors generally. See Table 20.

Table 20. Origins of foreign visitors to the Verde Valley

Origins of foreign visitors to the Verde Valley?	Count	Column N %
CANADA	75	57.7%
UNITED KINGDOM	23	17.7%
GERMANY	9	6.9%
SWITZERLAND	3	2.3%
FRANCE	3	2.3%
PHILIPPINES	2	1.5%
MEXICO	2	1.5%
KOREA	2	1.5%
ITALY	2	1.5%
CHINA	2	1.5%
AUSTRALIA	2	1.5%
THE NETHERLANDS	1	0.8%
PERU	1	0.8%
ISRAEL	1	0.8%
FINLAND	1	0.8%
BELGIUM	1	0.8%
Total	130	100.0%

Visitor Spending

Visitor spending is always a crucial component of any visitor study. Visitors to the Verde Valley reported a wide variety of expenditures in lodging-camping, restaurant and grocery, transportation (including gas), shopping, recreation/tour/entrance fees, spa/spiritual/metaphysical, and other expenditures. Lodging and camping (\$120) had the highest average expenditures, followed by restaurant and grocery (\$80), followed by shopping or arts and crafts purchases (\$75), and transportation including gas (\$51). Transportation including gas, was followed by tour, entrance fees or permits (\$25), and spa/spiritual/metaphysical (\$22). The “Other” category had relatively high expenditures (\$50), however, the other category had the least overall impact as only 9.6% of all respondents registered expenditures in this category. This category was also skewed by gambling expenses (over \$1000 a day), art classes, and retreats up to \$4,800 dollars. The final column (Valid N) in Table 20 indicates the percentage of respondents who had expenditures in the various categories, with restaurant and grocery (77.8%) being the highest, followed by transportation (71.5%); “other” expenditures had the lowest participation (9.6%). See Table 21.

Table 21. Average per-party per-day expenditures for visitors to the Verde Valley

	Mean	Median	Valid N
Lodging-Camping	\$120	\$94.5	57.4%
Restaurant & Grocery	\$80	\$100.0	77.8%
Transportation including gas	\$51	\$45.0	71.5%
Shopping or Arts and Crafts purchases	\$75	\$25.0	53.6%
Recreation - Tour - Entrance - Permit fees	\$25	\$25.0	49.2%
Spa - Spiritual - Metaphysical expenses	\$22	\$0.0	10.1%
Other expenses	\$50	\$0.0	9.6%

The question is often asked, which visitors contribute the most economic impact for Verde Valley, and what specific segments should the county and its communities target in their marketing? The visitor survey data show that those on a weekend visit (\$586) followed by vacation-leisure (\$567) and combination of business and pleasure (\$531) have the highest per-party expenditures. Those on day trips (\$397), or just passing through (\$376), followed by business (\$330), had the next highest per-party, per-day trip expenditures. Those visiting friends and relatives (\$278) had the lowest per-party, per-day expenditures. See Table 22.

Table 22. Primary purpose of trip by average per party expenditures per day.

	Total Expenditure	Average Stay	Per-day trip expenditure	Percent of all visitors
Weekend visit	\$586	2.2	\$266	13.0%
Vacation-leisure	\$567	4.3	\$132	52.8%
Combination of business and leisure travel	\$531	3.6	\$147	3.7%
Day trip	\$397	0	\$397	17.3%
Just passing through	\$376	2.1	\$179	8.1%
Business	\$330	3.3	\$100	3.2%
Visiting friends or relatives	\$278	4.5	\$62	9.8%

However, when factoring in the average length of stay (the average number of nights parties are in the Verde Valley) a different picture emerges. Day trip visitors (\$397) have the highest per-day expenditures. This is because day trip visitors do not stay overnight in the communities of the Verde Valley, and their expenditures are therefore not reduced by the factor of the number of nights stayed.

The second highest per-party, per-day expenditures are weekend visitors (\$266) and those visitors who are just passing through (\$179), followed by those on combination business and

leisure trips (\$147). Combination business and leisure trips are followed by vacation-leisure (\$132), business (\$100) and visiting friends and relatives (\$62). See Table 22. Thus, while long-stay visitors contribute significantly to the economy, some of the highest value visitors are weekend visitors and those passing through.

When considering exactly how to go about target marketing, other factors are also important. For example, combined business and pleasure visitors had high per party expenditures (\$531) but they only accounted for 3.8 percent of all visitors in this survey. The relative percentage of each of the visitor groups, determined by their primary purpose for visiting Verde Valley, are included as the last column in Table 22.

Expenditures are further broken down by category in Table 23. Combined business and pleasure travelers as well as business travelers had the highest lodging expenditures, while business/pleasure and vacation had the highest food and beverage expenditures.

Table 23. Primary purpose of trip by average per-party expenditures per trip.

Indicate item that best describes the primary purpose of your trip to the Verde Valley?	Just passing through	Day trip	Weekend visit	Vacation-leisure	Business	Combination of business and leisure travel	Visiting friends or relatives
Lodging-Camping	\$80	\$0	\$156	\$109	\$200	\$200	\$13
Restaurant & Grocery	\$59	\$71	\$73	\$129	\$40	\$100	\$81
Transportation including gas	\$49	\$47	\$39	\$55	\$5	\$20	\$55
Shopping or Arts and Crafts purchases	\$47	\$93	\$175	\$76	\$25	\$100	\$54
Recreation - Tour - Entrance - Permit fees	\$42	\$90	\$48	\$126	\$25	\$5	\$13
Spa - Spiritual - Metaphysical expenses	\$1	\$26	\$63	\$22	\$5	\$76	\$13
Other expenses	\$98	\$70	\$31	\$49	\$30	\$30	\$50
Total	\$376	\$397	\$586	\$567	\$330	\$531	\$278

Finally, respondents were analyzed to determine their per-person per-day expenditures by primary purpose of trip. In this analysis only respondents who indicated that they were staying overnight in the area were included; day trip visitors were excluded from this analysis. This analysis seems to show that visitors who are on leisure-vacations and weekend visitors may spend more in a short time than business travelers, who have higher than average expenditures due to their business dealings in the community. See Table 24.

Table 24. Primary purpose of trip by average per-person/per-day expenditures.

Indicate item that best describes the primary purpose of your trip to the Verde Valley?	Just passing through	Weekend visit	Vacation-leisure	Business	Combination of business and leisure travel	Visiting friends or relatives
Lodging-Camping	\$59	\$77	\$90	\$50	\$97	\$57
Restaurant & Grocery	\$25	\$40	\$38	\$22	\$45	\$31
Transportation including gas	\$21	\$22	\$28	\$20	\$54	\$27
Shopping or Arts and Crafts purchases	\$90	\$51	\$49	\$38	\$77	\$39
Recreation - Tour - Entrance - Permit fees	\$25	\$38	\$48	\$36	\$54	\$32
Spa - Spiritual - Metaphysical expenses	\$23	\$79	\$48	\$318	\$96	\$56
Other expenses	\$38	\$43	\$57	\$21	\$46	\$35
Total	\$281	\$350	\$358	\$503	\$469	\$276

This analysis shows the greatest per-person/per-day expenditures were for respondents who indicated that their primary purpose was business and combined leisure and business trip. The next highest per-person expenditures were recorded for vacation/leisure and weekend visits and by those who indicated that they were just passing through the Verde Valley. This analysis indicates that all types of visitors are important to the Verde Valley, and they all contribute to tourism's important economic impact.

Interest in participating in activities

The Verde Valley offers a great variety of activities for visitors to pursue, from Red Rock tours to art festivals to agri-tourism. Knowledge of the most popular activities and levels of interest in various facilities and activities can lead to the creation of additional opportunities for tourism services and product development.

In order to judge visitors' interest in specific Verde Valley activities, respondents were asked to indicate their level of interest in a specific activity and then to indicate whether they participated in this activity on this trip. Respondents were asked to indicate their interest and participation in: fishing area rivers/creeks; hiking or walking trails; visiting cultural or historic sites; visiting national or state parks; visiting US Forest service lands; visiting art galleries; rock climbing; back road tours with OHV's or jeeps; bird watching or observing wildlife; spiritual/metaphysical or vortex quests; visiting area creeks or rivers; mountain biking; RV use; camping/backpacking; playing golf; visiting Verde Valley wineries/wine tasting; having a resort/spa experience; and riding a scenic train/railway tour. Finally, respondents were asked about their interest in attending a special event, and were asked to define the special event.

All questions were measured on a scale of 1 to 5 where 1 is "not at all interested," and 5 is "extremely." Therefore, higher mean (average) scores indicate a greater level of interest in participating in the specific activity. The levels of interest in the specific activities are displayed in Table 25.

Table 25. Tell us how interested you are in participating in the following activities?

Tell us how interested you are in participating in the following activities?	Not at all interested	A little interested	Somewhat interested	Very interested	Extremely interested	Mean
Visiting national and state parks	7.4	8.6	16.9	41	26.1	3.7
Visiting cultural and historic sites	7.9	9.4	22.2	41.9	18.6	3.5
Hiking or walking trails	15.7	12.1	22.2	27.1	23	3.3
Visiting US Forest Service lands	15.4	13.1	24.8	29.6	17	3.2
Shopping	11.3	13.8	31.7	28.4	14.7	3.2
Visiting area creeks or rivers	19.2	14.5	25.9	27.8	12.6	3.0
Scenic train or Railway tour	28.3	11.1	20.8	25.3	14.5	2.9
Special event	45.1	4.5	6	15.8	28.6	2.8
Visiting Art Galleries	22.2	21.5	27.2	18.7	10.5	2.7
Bird watching and observing wildlife	31.6	16.4	22.5	20	9.5	2.6
Back Road tours (Jeep OHV etc)	39.5	15.5	18.9	17.2	8.9	2.4
Resort or Spa experience	41.4	14.4	17.3	17.8	9.2	2.4
Visiting Verde Valley wineries or wine tasting	40.9	15.7	22.3	14.6	6.6	2.3
Spiritual Metaphysical Vortexes	55.9	14.2	13.3	8.6	8	2.0
Fishing area rivers or creeks	58	12.5	13.3	10.8	5.4	1.9
Recreation Vehicle (RV) stay	71.1	7.5	5	5.7	10.7	1.8
Camping – Backpacking	64.6	9.9	9.2	10.4	6	1.8
Playing golf	67.1	8.9	8.6	8.6	6.9	1.8
Rock climbing	66.4	13.3	9.9	7.1	3.4	1.7
Mountain Biking	68.2	12	9.2	7.3	3.4	1.7

Visiting state and national parks had the highest mean score (3.7), with more than two-thirds (67.1%) of all respondents indicating they were either “very interested” or “extremely interested” in visiting national or state parks. Visiting cultural and historic places was the second most popular activity with a mean score of 3.5 and slightly more than three-fifths (60.5) of all respondents indicating they were either “very interested” or “extremely interested” in visiting cultural or historic sites. These two activities – state/national park and historic-places – are often

the top choices in Arizona tourism activities. The next highest interest was in hiking (3.3) an activity for which the Verde Valley is world-renowned, followed by another prominent tourism activity in Sedona and the Verde Valley – shopping (3.2). Visiting US Forest Service lands (3.2) and visiting area creeks and rivers (3.2) were also very popular, along with bird watching and observing wildlife (2.6). In Table 26 mean scores are ranked in order from “most interested” in participating to “least interested,” while the first column is a summation of those who were either “very interested” or “extremely interested” in a specific activity. See Table 26.

Table 26. Tell us how interested you are in participating in the following activities, by mean scores?

Tell us how interested you are in participating in the following activities?	Very or Extremely interested	Mean
Visiting national and state parks	67.2	3.7
Visiting cultural and historic sites	60.5	3.5
Hiking or walking trails	50.0	3.3
Shopping	43.1	3.2
Visiting US Forest Service lands	46.7	3.2
Visiting area creeks or rivers	40.4	3.0
Scenic train or Railway tour	39.8	2.9
Special event	44.4	2.8
Visiting Art Galleries	29.2	2.7
Bird watching and observing wildlife	29.5	2.6
Back Road tours (Jeep OHV etc)	26.1	2.4
Resort or Spa experience	27.0	2.4
Visiting Verde Valley wineries or wine tasting	21.2	2.3
Spiritual Metaphysical Vortexes	16.6	2.0
Fishing area rivers or creeks	16.2	1.9
Camping – Backpacking	16.4	1.8
Playing golf	15.5	1.8
Recreation Vehicle (RV) stay	16.4	1.8
Rock climbing	10.5	1.7
Mountain Biking	10.6	1.7

Finally, respondents were asked to indicate whether they actually participated in any of the activities available in the Verde Valley. Overall, respondents participated in activities at similar rates to those indicated above. The only change in the first six activities or those in which the interest scale was either “somewhat” or more interested in the activity was that respondents participated in hiking and shopping at higher rates than their stated levels of interest. Otherwise respondents appeared to participate in activities in direct relation to their levels of interest. Some

of these activities did not receive very much activity, namely special events, mountain biking and rock climbing, none of which were popular choices in interest or participation. See Table 27.

Table 27. What activities did/will you participate in?

What activities did/will you participate in?	Count	Column N %
Visiting national and state parks	407	66.2
Hiking or walking trails	390	63.4
Shopping	365	59.3
Visiting cultural and historic sites	364	59.2
Visiting area creeks or rivers	260	42.3
Visiting US Forest Service lands	247	40.2
Visiting Art Galleries	237	38.5
Scenic train or Railway tour	206	33.5
Bird watching and observing wildlife	198	32.2
Back Road tours (Jeep OHV etc)	152	24.7
Resort or Spa experience	144	23.4
Spiritual Metaphysical Vortexes	119	19.3
Recreation Vehicle (RV) stay	103	16.7
Visiting Verde Valley wineries or wine tasting	84	13.7
Playing golf	74	12.0
Fishing area rivers or creeks	70	11.4
Camping – Backpacking	60	9.8
Rock climbing	43	7.0
Special event	43	7.0
Mountain Biking	42	6.8
Total	615	

Does not sum to 100% due to multiple responses

What attractions do you plan to visit in the Verde Valley?

Respondents were asked to check all attractions that they had visited or planned to visit in the Verde Valley. These attractions range from the built environs and shopping of uptown Sedona - Hozho - Tlaquepaque to vortex sites. Of all the sites visited, uptown Sedona was the most popular (68.5%), followed by Jerome (50.7%) and Montezuma Castle National Monument (44.0%). Sites in and around Sedona scored highest, which is not surprising since the majority of respondents said they visited Sedona and most completed surveys were obtained in Sedona. See Table 28.

Table 28. What attractions did/will you plan to visit in the Verde Valley?

Please mark those attractions that you have visited or plan to visit in the Verde Valley?	Count	Column N %
Uptown Sedona	761	68.5
Historic Jerome	563	50.7
Montezuma Castle National Monument	489	44.0
Hillside Sedona - Hozho – Tlaquepaque	488	43.9
Red Rock State park	453	40.8
Sedona Airport scenic overlook	435	39.2
Verde Canyon Railway	329	29.6
Historic Cottonwood	326	29.3
Tuzigoot National Monument	326	29.3
Slide Rock State Park	320	28.8
Red Rock Crossing	316	28.4
Montezuma Well National Monument	307	27.6
Oak Creek Factory Outlets	282	25.4
Jerome State Historic Park	271	24.4
Cliff Castle Casino	242	21.8
Downtown Camp Verde	232	20.9
Vortex sites	227	20.4
Downtown Clarkdale	206	18.5
Out of Africa	201	18.1
Jerome Grand Hotel	177	15.9
Fort Verde State Park	168	15.1
Dead Horse State Park	166	14.9
Sedona Heritage Museum	147	13.2
Palatki and or Hononki Heritage Sites	139	12.5
Blazin M Ranch	134	12.1
West Fork Canyon	117	10.5
Gold King Mine	113	10.2
V Bar V Ranch Petroglyph Site	81	7.3
Mingus Mountain Recreational Area	74	6.7
Sycamore Canyon Wilderness	61	5.5

Does not sum to 100% due to multiple responses

Overall satisfaction with your experience in the Verde Valley?

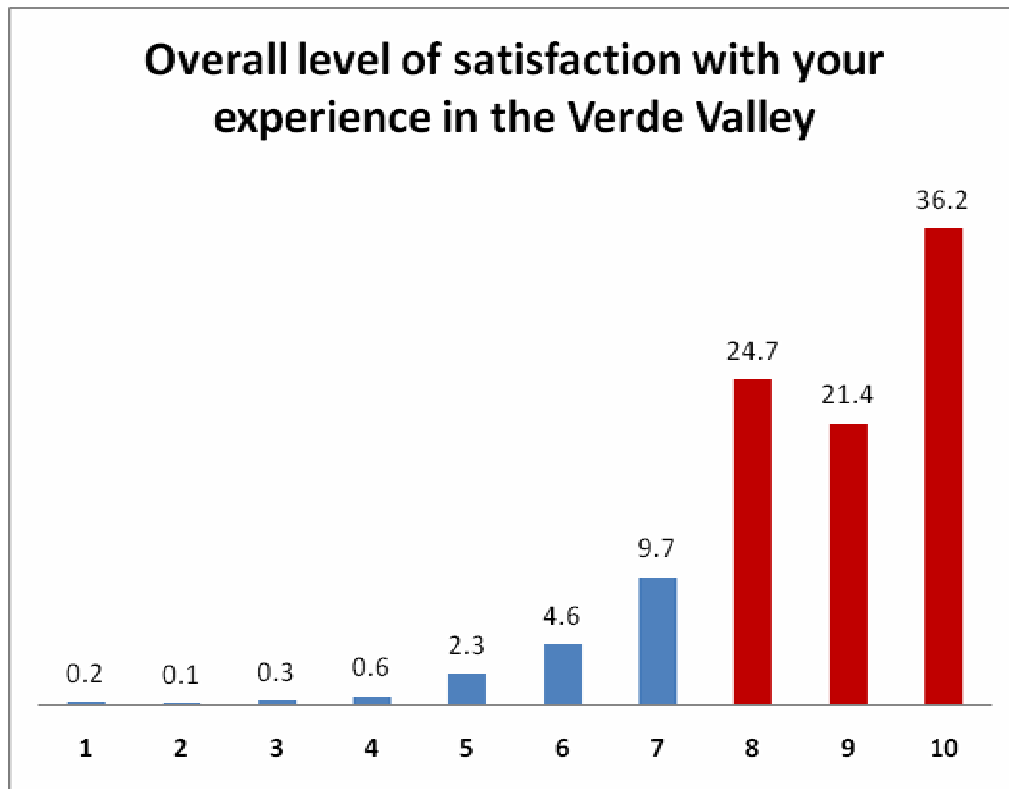
The final question on the survey asked visitors to rate their overall satisfaction with their experience in the Verde Valley. On a scale of 1 to 10 where 1 is “low” and 10 is “high.” The Verde Valley scored very well, with a mean score of 8.5 out of a possible 10, and a median of 9.0. Only 3.5 percent of respondents noted their level of satisfaction at 5 or below. Four-fifths (82.3%) of all respondents, rated their overall experience in the Verde Valley as 8 or better, indicating a very high level of satisfaction. See Table 29.

Table 29. Rate your overall satisfaction with your experience in the Verde Valley?

On a scale of 1 to 10 where 1 is low and 10 is high indicate your overall satisfaction with your experience in the Verde Valley		
	Count	Column N %
1	2	.2%
2	1	.1%
3	3	.3%
4	7	.6%
5	26	2.3%
6	52	4.6%
7	110	9.7%
8	281	24.7%
9	243	21.4%
10	412	36.2%
Total	1137	100.0%

Mean = 8.48
Median = 9.00

Figure10. Overall level of satisfaction with your experience in the Verde Valley



In conclusion, it appears that visitors to the Verde Valley have enjoyable experiences, are happy with their trips and participate in a variety of activities. The Verde Valley has a wide variety of attractions and activities to offer visitors and its communities have an opportunity to build upon the most popular tourism themes and redouble efforts to market the Verde Valley as a tourism region.

Appendix A:

Survey Questionnaire

VERDE VALLEY VISITOR STUDY

Hello! Welcome to the Verde Valley. We appreciate your time in contributing to our visitor survey. Please complete and return it to the surveyor. Your responses will be held in the strictest confidence and results will be analyzed so your answers on any single question can't be identified.

Please indicate the current month: ☐ January ☐ March ☐ May ☐ July ☐ September ☐ November
☐ February ☐ April ☐ June ☐ August ☐ October ☐ December

1. Is the Verde Valley the primary destination of your trip? ☐ Yes ☐ No

If not, what location is the primary destination of your trip?

2. Please mark all Verde Valley communities you plan to visit on this trip. ☐ Camp Verde ☐ Cottonwood ☐ Sedona
☐ Clarkdale ☐ Jerome

3. Indicate the item that **best** describes the primary purpose of your visit to the Verde Valley.

☐ Just Passing Through ☐ Vacation/Leisure ☐ Combination of Business and Leisure Travel
☐ Day Trip ☐ Business ☐ Visiting Friends and/or Relatives
☐ Weekend Visit

4. Indicate the item that best describes your primary mode of transportation. Mark only one.

☐ Private auto ☐ Rental car ☐ RV/Camper ☐ Motorcycle ☐ Tour bus ☐ Air Service ☐ Other

5. How much time, in total, will you spend in the Verde Valley on this trip?

☐ 1-3 hours ☐ 4-7 hours ☐ 8+ hours ☐ 1 night ☐ 2 nights ☐ 3-4 nights ☐ 5-7 nights ☐ 8+ nights

6. If staying overnight in the **Verde Valley**, what type of lodging are you using? Mark all that apply.

☐ Hotel/Motel ☐ Timeshare Property ☐ Second Home
☐ Resort ☐ Condominium ☐ Other (explain)
☐ Bed & Breakfast ☐ Campground/RV Park

If you are staying overnight away from home on this trip, please provide the locations below:

In what **City** did you spend last night?

In what **City** will you stay tonight?

7. If your permanent residence is in the U.S. please write in your 5-digit ZIP-CODE

If you are not from the U.S. please list your Country of Origin:

8. Please estimate as closely as possible the amount of money that your travel party is **spending per day in the Verde Valley** for the following categories (in U.S. dollars with NO decimal places, Example 92 not 92.00):

Please tell us the number of people these expenses cover.

Lodging/camping

\$

Shopping/Arts & Crafts

\$

Restaurant & grocery

\$

Recreation/Tour /
Entrance /Permit fees

\$

Transportation (incl gas)

\$

Spa/spiritual/metaphysical

\$

Other

\$

Define other:

J E

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9. First tell us how interested you are in participating in the following activities, then indicate those activities you have or will participate in.

Interest Level:	Not at all	A little	Some-what	Very	Extremely	Did/Will you participate?
Fishing area rivers/creeks	☐	☐	☐	☐	☐	☐
Hiking or walking trails	☐	☐	☐	☐	☐	☐
Visiting cultural and historic sites	☐	☐	☐	☐	☐	☐
Visiting national and state parks	☐	☐	☐	☐	☐	☐
Visiting U.S. Forest Service lands	☐	☐	☐	☐	☐	☐
Visiting Art Galleries	☐	☐	☐	☐	☐	☐
Rock Climbing	☐	☐	☐	☐	☐	☐
Back Road Tours (i.e. Jeep, OHV)	☐	☐	☐	☐	☐	☐
Birdwatching and observing wildlife	☐	☐	☐	☐	☐	☐
Spiritual/metaphysical/vortexes	☐	☐	☐	☐	☐	☐
Visiting area creeks or rivers	☐	☐	☐	☐	☐	☐
Mountain Biking	☐	☐	☐	☐	☐	☐
Recreational Vehicle (RV) Stay	☐	☐	☐	☐	☐	☐
Camping/Backpacking	☐	☐	☐	☐	☐	☐
Playing golf	☐	☐	☐	☐	☐	☐
Visiting Verde Valley wineries/wine tasting	☐	☐	☐	☐	☐	☐
Shopping	☐	☐	☐	☐	☐	☐
Resort/Spa experience	☐	☐	☐	☐	☐	☐
Scenic Train/Railway Tour	☐	☐	☐	☐	☐	☐
Special event: define	☐	☐	☐	☐	☐	☐

10. Please mark those attractions you have visited or plan to visit in the Verde Valley.

- | | | |
|--|---|--|
| ☐ Downtown Camp Verde | ☐ Sedona Airport Scenic Overlook | ☐ Blazin' M Ranch |
| ☐ Fort Verde State Park | ☐ Sedona Heritage Museum | ☐ Sycamore Canyon Wilderness |
| ☐ Cliff Castle Casino | ☐ Red Rock Crossing | ☐ Downtown Clarkdale |
| ☐ Out of Africa | ☐ Red Rock State Park | ☐ Verde Canyon Railroad |
| ☐ Montezuma Castle National Monument | ☐ Palatki and/or Hononki Heritage Sites | ☐ Tuzigoot National Monument |
| ☐ Montezuma Well National Monument | ☐ Vortex Sites | ☐ Historic Jerome |
| ☐ V Bar V Ranch Petroglyph Site | ☐ Slide Rock State Park | ☐ Jerome State Historic Park |
| ☐ Oak Creek Factory Outlets | ☐ West Fork Canyon | ☐ Jerome Grand Hotel |
| ☐ Uptown Sedona | ☐ Historic Cottonwood | ☐ Gold King Mine |
| ☐ Hillside Sedona/Hozho/Tlaquepaque | ☐ Dead Horse State Park | ☐ Mingus Mountain Rec Area |

11. On a scale of 1 to 10 where one is Low and ten is High, please indicate your overall satisfaction with your experience in the Verde Valley.

1 2 3 4 5 6 7 8 9 10
☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐

Finally, we have some questions about your travel party that will help us understand more about you.

12. What is your gender? ☐ Female ☐ Male In what year were you born? 19

13. How many people including yourself are in your travel party?

Number of: Women Men Children under 18

14. Who is traveling with you on this trip? ☐ Family and Friends ☐ Friends Only ☐ Organized Tour Group
☐ Family Only ☐ Nobody, travelling alone ☐ Business Associates

15. Which of the following categories best describes your annual household income?

- | | | | |
|--|--|--|--|
| ☐ Less than \$15,000 | ☐ \$35,000 to \$44,999 | ☐ \$65,000 to \$74,999 | ☐ \$95,000 or More |
| ☐ \$15,000 to \$24,999 | ☐ \$45,000 to \$54,999 | ☐ \$75,000 to \$84,999 | |
| ☐ \$25,000 to \$34,999 | ☐ \$55,000 to \$64,999 | ☐ \$85,000 to \$94,999 | |

Thank You For Taking The Time To Complete The Survey.

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Appendix B:

Regional Economic Impacts of the Verde Valley Tourism Survey

Introduction

Question eight in the survey of visitors to the Verde Valley asked respondents to detail their regional expenditures in each of the following categories: lodging, food and beverage, transportation (including gas), shopping/arts & crafts purchases, recreation/tour/entrance/permit fee, spa/spiritual/metaphysical, and miscellaneous other expenditures. Understanding the regional economic impacts of visitors can illustrate the economic importance of tourism and recreational activities to central Arizona and the Verde Valley, and can be compared to the impacts of other activities.

Expenditures from Verde Valley visitors were entered into the Input-Output model Impact analysis for PLANing (IMPLAN) and economic impacts and multiplier effects were calculated for Yavapai County, Arizona. Economic impact analysis (EIA) measures the direct and extended effects of expenditures related to a tourist activity by detailing industry response and multiplier effects on many regional economic indicators such as output, income, and employment.

Economic Impact Analysis Methods

Input-Output (I-O) models are an important tool used in assessing the economic impacts of specific activities. The I-O model incorporates transaction tables to keep track of inter-industry sales and purchases, as well as exogenous sectors of final demand such as households,

government, and foreign trade. The name, “I-O Model,” is a result of each industrial sector in the model being both a buyer and a seller of inputs and outputs.

The I-O model can be used to conduct economic impact analysis. Economic impact analysis involves applying a final demand change to the economic I-O model, and then analyzing the resulting changes in the economy (IMPLAN Analysis Guide, 1999). Impacts can be one-time impacts, such as the construction of a new factory, or they can be recurring impacts, such as the arrival of a new industry. Often, the impact analysis is concerned with multiplier effects, or the amount of money that is re-circulated through the economy after an initial expenditure.

Visitors were asked to estimate daily trip expenditures in the categories listed above. The visitors are assumed to be concentrated in the Verde Valley which is located mostly in Yavapai County, Arizona. Visitors from outside of the region purchased regional lodging, food, transportation, entertainment, etc., and this importation of expenditures represents an influx of “new” expenditures to the region. This analysis does not include respondents who live in Yavapai County as they do not represent “new” output to the region because it is assumed that regional residents would have allocated those expenditures to industrial sectors within the county anyway.

Direct, indirect, and induced effects of visitor expenditures were calculated for the Yavapai County region. The direct effects of expenditures capture the amount of purchases made by participants in each industrial category. Commodity purchases contributing to direct effects need to be margined to effectively allocate economic impacts. For example, many commodities available in Yavapai County were not necessarily manufactured within the county (e.g. gasoline,

souvenirs, etc.). By margining commodities, producer and purchaser prices are separated. IMPLAN uses regional purchasing coefficients (RPCs) to estimate gross regional trade flows (gross exports and imports), and incorporates the RPCs into the allocation of direct effects attributable to the defined study area. A regional purchasing coefficient represents the proportion of the total demands for a given commodity that is supplied by the region to itself (IMPLAN Analysis Guide, 1999).

Indirect effects are a measure of economic activity in other industrial sectors that is spurred by the direct effects. For example, Verde Valley visitors provided an economic boost to local food/beverage and lodging sectors (a direct effect). These hotels and restaurants require a number of inputs from other industries such as utilities, bulk food and beverage ingredients, and equipment. Indirect effects are the increased economic activity in these other industrial sectors caused by additional hotel and restaurant patrons.

Induced effects are an estimate of increased economic activity resulting from wages and income attributed to the direct effects. Staying with the previous example, a portion of wages earned by workers in the food/beverage and lodging sectors are then locally re-spent in other industrial sectors. IMPLAN uses Personal Consumption Expenditures (PCEs) to model induced effects. PCEs provide estimates of consumer expenditures on goods and services by different income classes (IMPLAN Analysis Guide, 1999).

Regional Expenditure Results

For the economic analysis, each survey represents a travel party. Expenditure questions asked respondents to estimate their expenditures for the travel party, i.e., each survey comprised one group or party. To estimate the number of visitors to the Verde Valley a population estimate was developed to use in expanding per-party expenditures to all potential visitors to the Verde Valley. It is estimated that approximately 3,786,167 people visited the Verde Valley in 2007 (the period of the survey). This estimate is derived from attractions visitation (national and state parks), lodging supply (hotels and time share properties) as well as average occupancy and private attraction entrance numbers. This population estimate is likely to be an underestimate of visitation as it does not include traffic count data. The researchers, however, prefer to err on the side of conservative population estimates. As discussed previously only out-of-region visitors are included in this analysis. Therefore, only these 3,786,167 out-of-region visitors are included in the economic impact analysis. To reduce the population estimate from visitors to travel parties (the measure in the survey) the population estimate is divided by the average party size of 2.6 people yielding an estimate of 1,456,218 visitor parties. The estimate of travel parties is then multiplied by average length of stay (2 days) to yield a total of 3,230,577 visitor parties for the economic impact analysis.

Answers from non-local survey respondents were totaled for each expenditure category and were averaged to represent the mean expenditures for each out-of-town visitor. The totals from each expenditure category were entered into the operationalized Input-Output model IMPLAN. Visitor expenditures entered into IMPLAN's Impact Analysis require bridging from survey expenditure categories into IMPLAN industry sectors. Most survey expenditure categories link

directly to IMPLAN industry sectors (e.g., “Grocery Store Purchases” directly corresponds with IMPLAN sector #405 “Food and Beverage Stores”). Only one survey expenditure category, “Transportation,” was allocated to multiple IMPLAN industrial sectors. Because the “Transportation” survey question asked participants to include gas, oil, and auto expenses, the overall expenditures were allocated to sector #407 “Gasoline Stations” (85%) and to sector #483 “Automotive Repair and Maintenance” (15%).

Visitors spent an average trip length of 2.0 nights in the Verde Valley, which was used to expand the per-day expenditures estimated in the survey. Table B1, illustrates visitor expenditures by category. Total expenditures listed in the last column were used for the subsequent economic impact analysis.

Table B1. Estimate of regional expenditures by Verde Valley visitors.

	Per Party-per day	Per person- per-day	Per trip	Population	Expenditure
Lodging	\$120	\$46.15	\$92.31	1,768,766	\$163,270,714
Restaurant/bar	\$80	\$30.77	\$61.54	2,287,067	\$140,742,607
Transportation including gas	\$51	\$19.52	\$39.04	2,193,974	\$85,649,386
Shopping arts/crafts	\$75	\$28.85	\$57.69	1,653,029	\$95,367,051
Recreation fees	\$25	\$9.62	\$19.23	1,514,647	\$29,127,836
Spiritual/spa	\$22	\$8.35	\$16.69	309,471	\$5,165,788
Other	\$50	\$19.12	\$38.23	261,667	\$10,003,718
Total					\$529,327,100

Regional Economic Impact Analysis Results

The total number of out-of-region visitors to the Verde Valley in the study period was 3,230,577 visitor parties. These visitors were responsible for some \$529.3 million of expenditures in Yavapai County, AZ, with an average regional expenditure of \$324.73 per party. Expenditures recorded for each industrial category were entered into IMPLAN's impact analysis.

Table B2 shows the direct, indirect, and induced effects of regional expenditures made by non-local visitors. Type SAM multipliers are presented for each of the economic impact categories. Type SAM multipliers are similar to Type III multipliers in that they represent the ratio of total effects to direct effects and include indirect and induced effects. They are also similar in incorporating employment-based Personal Consumption Expenditures (PCEs) to model overall induced effects. IMPLAN's Type SAM multipliers differ from traditional multipliers because IMPLAN uses all social accounting matrix information to generate a model that captures the inter-institutional transfers (IMPLAN Analysis Guide, 1999).

Table B2. Effects¹ and Multipliers of \$529,327,100 of Regional Expenditures by Verde Valley visitors

Economic Impacts	Direct Effects	Indirect Effects	Induced Effects	Type SAM Multipliers	Total
Total Output	\$529,327,100	\$103,787,437	\$139,081,025	1.46	\$772,195,562
Total Employment (FTE jobs)	9,490	1,083	1,557	1.28	12,130
Total Labor Income ²	\$187,264,560	\$33,166,988	\$44,373,066	1.41	\$264,804,614
Indirect Business Taxes ³	\$49,610,511	\$4,912,282	\$9,332,453	--	\$63,855,246

¹Effects are presented in 2004 dollars.

²Total labor includes employee compensation and proprietor income.

³Indirect business taxes include excise taxes, property taxes, fees, licenses, and sales tax paid by businesses.

If regional expenditures are substantial, increased tax revenues will be generated. These tax revenues can also be substantial, particularly in tourism and service-oriented industries, where additional tax collections occur. As seen in Table B2, visitors to the Verde Valley spurred an additional \$63.8 million of tax revenue for Yavapai County. Much of this money is re-invested into infrastructure and community needs that further support tourism and recreation industries. The majority of tax revenue coming from Verde Valley visitors is the result of sales tax paid to restaurants, hotels, and retail stores. Other fee and excise taxes are common in sectors such as car rentals and lodging industries.

Discussion

In 2007 visitors to the Verde Valley injected significant output to businesses in the regional economy of Yavapai County. Approximately \$529.3 million of regional purchases were made by out-of-region visitors, contributing to a total economic output of \$772.2 million for Yavapai County. This economic activity supported some 12,130 full-time equivalent (FTE) jobs. The total economic impact of visitors to the Verde Valley is therefore substantial, and contributes significantly to the greater regional economy.

Appendix C:

Open-ended comments to verbatim questions

If not what location is the primary destination of your trip?

Location	Frequency
1/3 VERDE VALLEY, 1/3 PHOENIX, 1/3 CALIFORNIA	1
ALBERTA, CANADA	1
ALBUQUERQUE, NM	3
ALL OVER AZ	1
ALSO MONUMENT VALLEY, PHOENIX	1
APACHE JUNCTION	4
ARIZONA- PHOENIX TO NAVAJO	1
ARIZONA	19
ARIZONA / NEW MEXICO	1
ASU	1
CA/AZ/TX	1
CALIFORNIA	9
CAMP VERDE	1
CANADA	2
CANNON	1
CANYON DE CHELLY	1
CAR TRIP THROUGH ARIZONA	1
CASA GRANDA ALSO MONTANA	1
CASA GRANDE	2
CHANDLER	1
CLARKDALE VISITING RELATIVES	1
CLIFF CASTLE CASINO	1
COLORADO	1
COLORADO SPRINGS, CO	1
CORNVILLE	1
COTTONWOOD	2
DEAD HORSE RANCH STATE PARK	1
DENVER, CO	1
DETROIT, MI	1
FAMILY IN MESA	1
FAMILY IN PAYSON	1
FLAGSTAFF	14
FLAGSTAFF & TUCSON	1
FLAGSTAFF PHOENIX SEDONA	1
FLAGSTAFF WYNDHAM RESORT	1

FLAGSTAFF/SHOWLOW	1
FLORIDA	2
FROM FLAGSTAFF TO COTTONWOOD	1
GLENDALE	1
GRAND CANYON-LAS VEGAS	1
GRAND CANYON & SANTA MARIA CA	1
GRAND CANYON (2 NIGHTS)	1
GRAND CANYON NP	82
GRAND CANYON RAILROAD	1
GRAND CANYON WEST, SOUTH RIM, MONUMENT VALLEY	1
GRAND CANYON, SEDONA, TUCSON	1
GRAND CANYON/PHOENIX/SCOTTSDALE	1
GRAND CANYON/SEDONA/FLAGSTAFF	1
GRANDE CANYON	1
INDIO, CA	1
JEROME	2
JUST A QUICK GETAWAY	1
JUST VISITING LOOKING AROUND	1
KANAB, UT	1
KAYENTA	1
LAS VEGAS, GRAND CANYON, SEDONA	1
LAS VEGAS, NV	21
LAS VEGAS, PHOENIX, GRAND CANYON	1
LOS ANGELES, CA	1
MESA	6
MESA (WINTER)	1
MEXICO	1
MIKE & DONNA'S	1
MOJAVE COUNTY	1
MONTEZUMA	1
MOTORCYCLE TRIP- ARIZONA TO NEVADA	1
N ARIZ	1
NAU	1
NEVADA AND ARIZONA-2 WK VACATION THRU	1
NEW MEXICO	1
NONE SPECIFIC	1
NORTHERN ARIZONA	1
NOWHERE	1
OAK CREEK CANYON	2
OAK CREEK RANCH SCHOOL	2

OAK CREEK VALLEY	1
OAK CREEK VILLAGE	1
ON WAY HOME	1
PAGE	2
PAGE SPRINGS	1
PAGOSA SPRINGS, CO	1
PARADISE VALLEY	1
PASADENA, CA	1
PASSING THRU	1
PHOENIX	62
PHOENIX (BUSINESS)	1
PHOENIX AZ	4
PHOENIX, FORT COLLINS, CO	1
PHOENIX/MESA	2
PHOENIX/SCOTTSDALE	1
PHOENIX/SEDONA	3
PHOENIX/TUCSON	1
PRESCOTT	7
PRESCOTT & SEDONA	1
PRESCOTT VALLEY	3
PUEBLO, CO	1
QUARTZSITE	1
RAMSEY CANYON	1
S. ARIZONA/GRAND CANYON/LAS VEGAS	1
SALT LAKE CITY, UT	1
SAN DIEGO, CA	3
SAN FRANCISCO, CA	1
SANTA FE, NM	1
SCOTTSDALE	22
SEATTLE	1
SEATTLE WA	1
SEDONA-GRAND CANYON	1
SEDONA	116
SEDONA & FLAGSTAFF	1
SEDONA & GRAND CANYON	1
SEDONA & MESA	1
SEDONA GRAND CANYON	1
SEDONA PARK	1
SEDONA, GRAND CANYON	1
SEDONA/FLAGSTAFF	1

SEDONA/GRAND CANYON	1
SEDONA/SANTA FE/HILTON HEAD	1
SILVER CITY, NM	1
SNOWBIRD	1
SOUTHWEST	3
STATE OF ARIZONA	1
STAYING IN PHOENIX, DROVE UP FOR A FEW DAYS	1
STRAWBERRY	1
SUN VALLEY AZ	1
TEMPE- GRADUATION	1
TEXAS	1
THIS IS A ROAD TRIP	1
THROUGHOUT ARIZONA	1
THROUGHOUT AZ- RV	1
TOMBSTONE	1
TOUR OF NORTH AZ & SO. UTAH PARKS	1
TOURING & CAMPING TONTO NF	1
TOURING SOUTHWEST ON TO N.W.	1
TRAVELLING THROUGH ARIZONA	1
TRIP AROUND CA/AZ/NEV	1
TUCSON	14
TUCSON, SCOTTSDALE	1
USA	6
UTAH	1
VARIOUS-PHOENIX, SEDONA, NORTH ARIZONA	1
VARIOUS	1
VERDE CANYON TRAIN	1
VERDE VALLEY AND QUARTZSITE	1
VILLAGE OF OAK CREEK	1
VISITING MY DAUGHTER	1
WE'RE ON HOLIDAY-NO PRIMARY DESTINATION	1
WE LIVE IN PRESCOTT VALLEY-ESCAPE TO SEDONA OFTEN	1
WEDDING	1
WHITE MOUNTAINS & VERDE VALLEY	1
WICKENBURG	1
WILD FLOWER INN	1
WILLIAMS POLAR EXPRESS	1
WINSLOW	1
WYLIE, TX	1

YOUNG, AZ	1
YUMA	3
ZION, BRYCE, GRAND CANYON	1
Total	1284

Other place you are staying

	Frequency
ALMA DE SEDONA	1
AMBER'S HOUSE	1
APT	1
CAMP IN AUTO	1
CAMPING	1
CANADA	1
DAUGHTERS APARTMENT	1
DAUGHTERS HOME	1
DAY	1
FAIRFIELD-SEDONA	1
FAMILY	4
FRIEND'S SECOND HOME	1
FRIEND	2
FRIENDS	6
FRIENDS AND RELATIVES	1
FRIENDS HOME	1
FRIENDS HOUSE	2
HOME	1
HOME OF RELATIVES	1
HOSTEL	1
HOUSE RENTAL	3
INTIMATE 12 UNIT INN	1
LITTLE DAISY INN	1
LIVE HERE	1
LIVE IN AREA	1
LIVE IN CAMP VERDE	1
LOS ABRIGATOS	1
MY MOTHER'S HOUSE	1
MY OWN TOWN	1
NOT SPENDING THE NIGHT	1
NOT STAYING OVERNIGHT	1
OR WITH FAMILY	1
PAGE SPRINGS, SUNRISE RESORT	1
PARENTS HOUSE	2
PHOENIX	1
PRIVATE HOME	1

PRIVATE RESIDENCE	2
PRIVATE RESIDENCE RENTAL	1
PRIVATE VEHICLE	1
RELATIVE'S HOME	1
RELATIVE	2
RELATIVES	5
RENTAL HOME	1
RENTAL HOME/SHORT-TERM	1
RENTAL HOUSE	1
RENTAL PROPERTY	1
RIDGE ON SEDONA GOLF RESORT	1
RV	1
SCOTTSDALE	2
SISTER'S NEW RENTAL HOME	1
SISTER'S PLACE	1
STAYING IN SCOTTSDALE	1
STAYING W/FAMILY	1
TRAVELLING WITH OUR DOG	1
VACATION RENTAL HOME	1

In what city did you spend last night?

	Frequency
1ST DAY HERE	1
ALBUQUERQUE, NM	4
AMARILLO, TX	2
ANTHEM- PHOENIX AZ	1
APACHE JCT.	1
APACHE JUNCTION	3
ARCOSANTI	1
ATLANTA, GA	1
AUSTIN, TX	1
AVONDALE	1
BELLFLOWER, CA	1
BIRMINGHAM, MI	1
BLACK CANYON	1
BLYTHE, CA	1
BOSTON, MA	1
BRADLEY, CA	1
BRENTWOOD, CA	1
BUCKEYE	1
BUFFALO, NY	1
CAMP VERDE	33
CAREFREE	1
CARLSBAD, CA	1
CASA GRANDE	2
CHANDLER	8
CHICAGO, IL	2
CHINLE	1
CLARKDALE	5
CORNVILLE	2
CORONA, CA	1
COTTONWOOD- DEAD HORSE	1
COTTONWOOD	133
COTTONWOOD (77 CAMPGROUND)	1
COTTONWOOD/QUALITY INN	1
DALLAS, TX	1
DANVILLE, CA	1
DENVER, CO	2
DULUTH, MN	1

DURANGO, CO	1
ESCONDIDO, CA	1
FLAGSTAFF	51
FOUNTAIN HILLS	2
GALLUP, NM	5
GILBERT	4
GLOBE	1
GRAND CANYON NP	15
GRAND CANYON VILLAGE	1
GREEN VALLEY	1
HANOVER, MA	1
HARDROCK	2
HENDERSON, NV	1
HOLBROOK	2
HOME	1
HOTEL/QUALITY INN	1
HYATT	1
INDIANAPOLIS, IN	1
JEROME	7
KINGMAN	3
LAS VEGAS, NV	16
LAUGHLIN, NV	2
LEUPP	1
LOS ANGELES, CA	3
MANCHESTER, NH	1
MESA	13
MINGUS SPRINGS	1
MINNEAPOLIS, MN	1
MOAB, UT	1
MONTE VISTA, CO	1
MONTREAL	1
MONUMENT VALLEY	1
MORMON LAKE	1
NEW YORK, NY	2
NORFOLK,VA	1
OAK CREEK	6
OAK CREEK/SEDONA	1
PAGE	2
PAGE SPRINGS	2
PAGOSA SPRINGS, CO	1

PALM SPRINGS, CA	2
PARADISE VALLEY	2
PAULDEN	1
PAYSON	3
PEORIA	1
PHOENIX	153
PRESCOTT	7
PRESCOTT VALLEY	5
PROVIDENCE, RI	1
QUARTZSITE	1
RIM ROCK	1
RIMROCK	2
RIVERSIDE, CA	1
SALT LAKE, UT	1
SAN DIEGO, CA	2
SANTA FE, NM	5
SCOTTSDALE	39
SCOTTSDALE (HOME)	1
SEASIDE, FL	1
SEDONA	368
SEDONA (LAST 2 NIGHTS)	1
SEDONA (UPTOWN)	1
SIERRA VISTA	1
SILVER CITY, NM	1
SPRINGDALE, UT	1
SPRINGER, NM	1
ST PAUL, MN	1
STRAWBERRY	1
SUN CITY	2
SUN CITY AZ	1
SUN CITY WEST	1
SUN LAKES	2
SUN VALLEY	1
SURPRISE	3
TEMPE	6
THOUSAND TRIALS	1
TT/NACO VERDE VALLEY	1
TUBA CITY, AZ	1
TUCSON	19
TUCUMCARI NM	1

TUSAYAN	1
TUSAYAN (OUTSIDE GRAND CANYON SOUTH ENTRANCE)	1
TUSAYAN AZ	1
VERDE VALLEY	5
VILLAGE OF OAK CREEK	4
WICKENBURG	1
WILLIAMS	7
WINSLOW	1
WORK FROM BULLHEAD AZ	1
YUMA	1
ZANE GREY PARK	1
ZION	1

In what city will you stay tonight?

	Frequency
ALBUQUERQUE, NM	1
ANCHORAGE, AK	2
APACHE JUNCTION	3
ARIZONA	1
BACK HOME-WORK DONE	1
BARNEGAT LIGHT, NJ	1
BARSTOW, CA	1
BLACK CANYON	1
BLYTHE, CA	1
BUCKEYE	2
BULLHEAD CITY	1
CAMERON	1
CAMP VERDE	41
CAMP VERDE (DISTANT DRUMS)	1
CAREFREE	1
CAVE SPRINGS CAMPGROUND	1
CHANDLER	5
CHICAGO, IL	1
CLAREMONT, CA	1
CLARKDALE	7
CORNVILLE	2
COTTONWOOD	150
DEAD HORSE RANCH STATE PARK	2
DENVER, CO	1
DILKON	1
DON'T KNOW	1
FLAGSTAFF	41
FOUNTAIN HILLS	1
GILBERT	2
GLENDALE	3
GOLD CANYON	1
GOLDEN, CO	1
GRAND CANYON NP	13
GRAND CANYON VILLAGE	2
HOME	5
JEROME	5

JOSHUA TREE, CA	1
LAKE HAVASU CITY	3
LAS VEGAS	2
LAS VEGAS, NV	8
LAUGHLIN, NV	3
LEUPP	1
LOS ANGELES, CA	1
MESA	12
NEEDLES	1
NEW MEXICO ?	1
NOT SURE YET!	1
OAK CREEK	6
OAK CREEK CANYON	1
OAK CREEK VILLAGE	1
OAK CREEK/SEDONA	1
PAGE	1
PAGE SPRINGS	3
PAYSON	1
PEORIA	1
PHOENIX	89
PRESCOTT	13
PRESCOTT VALLEY	4
RIM ROCK	1
RIMROCK	1
SANTA FE, NM	1
SANTA MONICA, CA	1
SCOTTSDALE	29
SEATTLE, WA	1
SEDONA	459
SEDONA (UPTOWN)	1
SEDONA OR COTTONWOOD	1
SEDONA OR FLAGSTAFF	1
SHOWLOW	1
SONOITA	1
ST. LOUIS, MO	1
STRAWBERRY/CABIN	1
SUN CITY	2
SUN LAKES	1
SURPRISE	3
SURPRISE PHOENIX	1

TEMPE	5
THOUSAND TRAILS	2
TOLEDO, OH	1
TOLLESON	1
TONTO NF	1
TUCSON	15
TUCSON / NACO / VERDE VALLEY	1
TUSAYAN(GRAND CANYON)	1
UNKNOWN	2
VERDE VALLEY	6
VILLAGE OF OAK CREEK	6
WICKENBURG	1
WILLIAMS	5

Define other expenditures

	Frequency
\$1000-GAMBLING	1
\$200 PER DAY	1
\$300-TOTAL	1
\$1000	2
\$1500	1
2 FAMILIES	1
2 GRADUATIONS- NO \$	1
\$2000	1
\$3000 came from Phoenix	1
\$4680	1
ART CENTER 5 DAY CLASS	1
ART PURCHASE	1
CARDS SOUVENIRS	1
CHURCH	1
CHURCH ACTIVITIES	1
CLIFF CASTLE CASINO	7
DINING	1
ENTERTAINMENT	1
ENTERTAINMENT	3
FOOD	1
FUN: PRICELESS	1
GAMBLING	4
GIFT	1
GIFTS-SOUVENIRS	1
GIFTS	1
GOLF	2
HIKING	1
HOME FURNISHINGS	1
JEWELRY	1
JUST GOT HERE	7
MEDICAL \$8500 food, \$6500 transport, \$2000 shop, \$5000 spa	1
MISC. EXPENSE	1
MISCELLANEOUS	4
NONE	1

OUT OF AFRICA, TRAIN RIDE	1
PACKAGED GIFT	1
PLAYING	1
POSTCARDS, STAMPS, GADGETS, TIPS	1
PUB	1
RESTAURANT DINNER	1
RESTAURANTS	1
RETREAT/TRAINING	1
SHOPPING	1
TIMESHARE MAINTENANCE FEE/USAGE	1
TOTAL \$100 (THIS WAS A GIFT)	1
TOTAL \$1000	1
TOTAL EXPENSE \$3000	1
UNLIMITED	1
WEEK LONG PAINTING WORKSHOP	1
WILL KNOW TOMORROW	1

Special Events

	Frequency
AGODONDO RUN	1
AIRPLANES & HORSES	1
AMBER'S HOUSE	1
ART WORKSHOPS	1
BALLOON RIDE	3
BIRDING FESTIVAL	1
BIRTHDAY 30/50	1
BLAZIN M RANCH	1
BROTHERS WEDDING	1
CASINO	3
CHURCH	1
CONCERTS	2
CONCERTS/SPEAKERS/CLASSES	1
CONFERENCES	1
CONTRA DANCE IN COTTONWOOD	2
ELKS / VFW	1
FAMILY	1
FREE SOUL RETREAT	1
GRAND CANYON NP	1
GRAND CANYON RAILWAY	1
GRAND CANYON SAFARI	1
GRAND CANYON TOURS	1
HELICOPTER TOUR	1
HOLIDAY LIGHTS	1
HORSEBACK RIDING	1
HOT AIR BALLOON	1
HUNTING	1
JAZZ FEST.	1
JAZZ FESTIVAL	2
LIGHT DISPLAY	3
LIVING NATIVITY X-MAS LUMINARIES	1
MOTORCYCLE	1
MOTORCYCLING	1
MUSIC FESTIVAL	3
NATIVE AMERICAN EXPERIENCES	1
NEW YEARS EVE PARTY	1

OUT OF AFRICA WILDLIFE PARK	4
PARENTS WEEKEND-OCRS	1
PARTY	1
PASSING THRU	1
PINK JEEP	1
PUB/WASHROOMS	1
RELAX	1
RELAXING	1
ROCK SHOWS: MISSED IT NEED TO BE HELD IN	
MARCH	1
RODEO	1
SHOP TILL I DROP	1
SHOW	1
SLEDDING	1
SPIRITUAL VISITOR E.G. SWAMS	1
SPOOK NIGHT DANCE-COTTONWOOD	
FAIRGROUNDS	1
ST PATRICKS DAY CELEBRATION	1
TENNIS	1
TOUR GRAND CANYON	1
TOUR OF LIGHTS	1
TOURISM	1
TOWN REUNION	2
TRACTOR PULL	1
VERDE DAYS, OUT OF AFRICA	1
VERDE RIVER DAY-FORT VERDE DAYS	1
VERDE RIVER DAYS	2
VISIT FAMILY	1
WEDDING	1
WESTERN	1
WILDLIFE PARK	1
WINERY	1

Appendix D:

Seasonal Analysis of Verde Valley Visitors

Town where the survey was administered

	Calendar quarter of survey			
	Quarter #1 - January - March	Quarter #2 - April - June	Quarter #3 - July - September	Quarter #4 - October - December
	Column N %	Column N %	Column N %	Column N %
Clarkdale	9.3%	4.8%	16.6%	16.4%
Cottonwood	18.1%	14.1%	25.9%	21.4%
Camp Verde	16.7%	3.0%	14.1%	16.0%
Jerome	3.6%	.3%	.5%	1.9%
Sedona	52.4%	77.8%	42.9%	44.3%

Verde Valley communities by number of surveys by month

	Origin of Survey				
	Clarkdale	Cottonwood	Camp Verde	Jerome	Sedona
	Column N %	Column N %	Column N %	Column N %	Column N %
January 2007	17.7%	13.1%	20.0%	17.4%	10.3%
February 2007	.0%	6.6%	8.8%	43.5%	9.0%
March 2007	9.9%	11.5%	15.0%	4.3%	11.7%
April 2007	4.3%	4.1%	.6%	4.3%	13.8%
May 2007	7.1%	10.2%	1.3%	.0%	13.1%
June 2007	.0%	4.9%	4.4%	.0%	9.7%
July 2007	11.3%	4.5%	5.6%	.0%	5.9%
August 2007	7.8%	9.8%	6.3%	.0%	5.1%
September 2007	5.0%	7.4%	6.3%	4.3%	1.4%
October 2007	.0%	8.6%	1.3%	8.7%	2.7%
November 2007	2.8%	7.0%	.0%	17.4%	2.3%
December 2006	34.0%	12.3%	30.6%	.0%	15.0%
Total	100.0%	100.0%	100.0%	100.0%	100.0%

Is the Verde Valley the primary destination of your trip?

	Calendar quarter of survey			
	Quarter #1 - January - March	Quarter #2 - April - June	Quarter #3 - July - September	Quarter #4 - October - December
	Column N %	Column N %	Column N %	Column N %
Yes	55.7%	61.8%	58.9%	53.2%
No	44.3%	38.2%	41.1%	46.8%
Total	100.0%	100.0%	100.0%	100.0%

Please mark all Verde Valley communities you plan to visit on this trip?

	Calendar quarter of survey			
	Quarter #1 - January - March	Quarter #2 - April - June	Quarter #3 - July - September	Quarter #4 - October - December
	Column N %	Column N %	Column N %	Column N %
Sedona	85.7%	88.9%	81.7%	78.0%
Jerome	44.9%	46.4%	49.7%	67.8%
Cottonwood	43.9%	37.2%	45.7%	74.6%
Clarkdale	24.1%	20.4%	26.9%	38.1%
Camp Verde	26.1%	23.2%	28.9%	33.9%
Total	100.0%	100.0%	100.0%	100.0%

Does not sum to 100% because of multiple responses.

Indicate item that best describes the primary purpose of your trip to the Verde Valley?

	Calendar quarter of survey			
	Quarter #1 - January - March	Quarter #2 - April - June	Quarter #3 - July - September	Quarter #4 - October - December
	Column N %	Column N %	Column N %	Column N %
Just passing through	8.2%	9.0%	9.4%	6.7%
Day trip	18.3%	14.8%	18.8%	18.6%
Weekend visit	11.1%	15.7%	9.4%	15.4%
Vacation-leisure	54.3%	53.3%	56.9%	50.3%
Business	3.6%	3.0%	1.5%	4.2%
Combination of business and leisure travel	3.8%	3.9%	3.5%	3.5%
Visiting friends or relatives	11.1%	7.5%	9.9%	11.2%

Does not sum to 100% because of multiple responses.

What is your primary mode of transportation?

	Calendar quarter of survey			
	Quarter #1 - January - March	Quarter #2 - April - June	Quarter #3 - July - September	Quarter #4 - October - December
	Column N %	Column N %	Column N %	Column N %
Private auto	50.2%	45.8%	56.7%	53.8%
Rental car	35.4%	41.6%	31.5%	34.0%
RV/Camper	9.8%	9.9%	6.4%	7.5%
Air service	1.9%	.9%	2.5%	1.9%
Motorcycle	.5%	1.5%	1.0%	1.3%
Other	1.4%	.3%	1.0%	.6%
Tour Bus	.7%	.0%	1.0%	.9%
Total	100.0%	100.0%	100.0%	100.0%

How much time in total did you spend in the Verde Valley on this trip?

	Calendar quarter of survey			
	Quarter #1 - January - March	Quarter #2 - April - June	Quarter #3 - July - September	Quarter #4 - October - December
	Column N %	Column N %	Column N %	Column N %
1 night	14.8%	21.3%	17.4%	19.1%
2 nights	30.3%	22.8%	18.1%	27.7%
3 - 4 nights	23.4%	24.7%	19.5%	16.8%
5 - 7 nights	17.8%	25.1%	31.5%	25.0%
8+ nights	13.8%	6.0%	13.4%	11.4%
Total	100.0%	100.0%	100.0%	100.0%

If staying overnight in the Verde Valley what type of lodging are you using?

	Calendar quarter of survey			
	Quarter #1 - January - March	Quarter #2 - April - June	Quarter #3 - July - September	Quarter #4 - October - December
	Column N %	Column N %	Column N %	Column N %
Hotel or motel	37.2%	39.7%	47.8%	42.1%
Timeshare property	20.4%	14.5%	24.2%	19.6%
Campground or RV Park	15.8%	14.5%	11.8%	10.6%
Bed and breakfast	17.6%	17.7%	2.5%	8.5%
Resort	7.7%	11.7%	5.6%	14.5%
Other	3.7%	4.3%	9.9%	6.4%
Condominium	2.5%	2.1%	.6%	1.3%
Second home	.9%	1.4%	1.2%	1.3%
Total	100.0%	100.0%	100.0%	100.0%

Does not sum to 100% due to multiple responses.

Origins of visitors to the Verde Valley?

	Calendar quarter of survey			
	Quarter #1 - January - March	Quarter #2 - April - June	Quarter #3 - July - September	Quarter #4 - October - December
	Column N %	Column N %	Column N %	Column N %
Arizona	26.4%	26.0%	36.2%	33.2%
California	11.1%	18.1%	10.6%	13.4%
Wisconsin	8.6%	4.6%	1.1%	4.6%
Illinois	4.2%	4.6%	3.2%	5.7%
New York	3.9%	3.0%	4.8%	2.5%
Washington	5.3%	2.6%	1.6%	1.8%
Ohio	3.1%	3.6%	2.7%	1.8%
Colorado	3.3%	3.0%	.5%	3.2%
Michigan	3.1%	1.3%	3.2%	3.5%
Texas	1.7%	3.0%	4.3%	2.1%
Pennsylvania	3.9%	2.0%	3.2%	1.1%
New Jersey	2.2%	3.6%	1.6%	2.5%
Florida	1.4%	3.3%	3.2%	2.1%
Massachusetts	2.5%	2.3%	2.1%	2.1%
Oregon	1.7%	1.6%	.5%	2.1%
Nevada	2.2%	1.0%	1.1%	1.8%
Virginia	1.7%	1.6%	1.6%	.7%
Connecticut	1.4%	1.0%	1.6%	1.4%
New Mexico	.3%	2.0%	1.1%	.7%
Indiana	.8%	.7%	1.6%	.7%
Kentucky	.8%	.7%	1.1%	1.1%
North Carolina	1.1%	1.3%	.0%	.7%
Maryland	.6%	1.3%	1.1%	.7%
Iowa	.8%	.3%	1.6%	.4%
Tennessee	.3%	1.0%	2.1%	.0%
Rhode Island	.8%	.0%	.5%	1.4%
South Dakota	.8%	.7%	.0%	.7%
Montana	.8%	.0%	.5%	.7%
Alabama	.3%	1.0%	1.1%	.0%
New Hampshire	1.1%	.0%	.0%	.7%
Wyoming	.0%	.0%	.0%	1.8%
South Carolina	.3%	.7%	1.1%	.0%
Utah	.3%	.7%	.5%	.0%
Idaho	.0%	1.0%	.5%	.0%
Arkansas	.6%	.0%	.0%	.7%
Kansas	.0%	.3%	1.6%	.0%
Alaska	.3%	.0%	.0%	.7%
Oklahoma	.0%	.0%	1.1%	.4%
Louisiana	.6%	.3%	.0%	.0%
Nebraska	.6%	.0%	.0%	.4%
Georgia	.3%	.0%	.5%	.4%
District of Columbia	.3%	.7%	.0%	.0%
Vermont	.0%	.3%	.5%	.4%
Maine	.3%	.3%	.0%	.4%
Hawaii	.0%	.3%	.0%	.4%
North Dakota	.3%	.0%	.0%	.4%
Delaware	.0%	.3%	.5%	.0%
96192	.3%	.0%	.0%	.0%
83150	.0%	.0%	.0%	.4%
39912	.0%	.0%	.0%	.4%
867	.0%	.0%	.0%	.4%
Total	100.0%	100.0%	100.0%	100.0%

Origins of Arizona visitors to the Verde Valley?

	Calendar quarter of survey			
	Quarter #1 - January - March	Quarter #2 - April - June	Quarter #3 - July - September	Quarter #4 - October - December
	Column N %	Column N %	Column N %	Column N %
Phoenix	17.4%	19.7%	15.9%	17.6%
Tucson	13.0%	10.5%	14.3%	8.8%
Chandler	12.0%	11.8%	3.2%	8.8%
Fountain Hills	8.7%	11.8%	.0%	7.7%
Mesa	5.4%	1.3%	11.1%	8.8%
Glendale	7.6%	9.2%	.0%	5.5%
Flagstaff	2.2%	3.9%	7.9%	7.7%
Sun City	2.2%	2.6%	4.8%	6.6%
Camp Verde	1.1%	2.6%	7.9%	1.1%
Tempe	1.1%	5.3%	.0%	2.2%
Douglas	1.1%	2.6%	3.2%	2.2%
Apache Junction	4.3%	1.3%	.0%	2.2%
Goodyear	2.2%	1.3%	3.2%	1.1%
Quartzsite	1.1%	.0%	1.6%	3.3%
Peoria	.0%	3.9%	.0%	1.1%
Clarkdale	2.2%	.0%	.0%	1.1%
Black Canyon City	.0%	3.9%	.0%	1.1%
Prescott Valley	1.1%	.0%	1.6%	1.1%
Prescott	2.2%	.0%	.0%	1.1%
Leupp	.0%	.0%	4.8%	.0%
Greenhaven	1.1%	1.3%	1.6%	.0%
Cottonwood	1.1%	.0%	3.2%	.0%
Winkelman	2.2%	.0%	.0%	.0%
Wickenburg	.0%	.0%	3.2%	.0%
Taylor	2.2%	.0%	.0%	.0%
Sedona	1.1%	.0%	.0%	1.1%
Payson	.0%	.0%	.0%	2.2%
Kykotsmobi Village	.0%	2.6%	.0%	.0%
Gilbert	1.1%	.0%	.0%	1.1%
Fort Mohave	.0%	.0%	.0%	2.2%
Chino Valley	.0%	1.3%	1.6%	.0%
Buckeye	1.1%	.0%	.0%	1.1%
Tuba City	.0%	.0%	1.6%	.0%
Thatcher	.0%	1.3%	.0%	.0%
Safford	1.1%	.0%	.0%	.0%
Pinon	.0%	.0%	1.6%	.0%
Paulden	1.1%	.0%	.0%	.0%
Parks	.0%	.0%	.0%	1.1%
Munds Park	1.1%	.0%	.0%	.0%
Lake Havasu City	.0%	.0%	.0%	1.1%
Kayenta	.0%	.0%	1.6%	.0%
Hotevilla	.0%	.0%	1.6%	.0%
Grand Canyon	1.1%	.0%	.0%	.0%
Corona de Tucson	1.1%	.0%	.0%	.0%
Chinle	.0%	.0%	1.6%	.0%
Cave Creek	.0%	.0%	1.6%	.0%
Cameron	.0%	.0%	1.6%	.0%
Avondale	.0%	1.3%	.0%	.0%
Arivaca	.0%	.0%	.0%	1.1%
Total	100.0%	100.0%	100.0%	100.0%

Origins of foreign visitors to the Verde Valley?

	Calendar quarter of survey			
	Quarter #1 - January - March	Quarter #2 - April - June	Quarter #3 - July - September	Quarter #4 - October - December
	Column N %	Column N %	Column N %	Column N %
CANADA	50.0%	57.7%	25.0%	62.9%
UNITED KINGDOM	19.2%	26.9%	6.3%	14.3%
GERMANY	7.7%	3.8%	6.3%	5.7%
SWITZERLAND	1.9%	.0%	6.3%	2.9%
FRANCE	1.9%	.0%	12.5%	.0%
CANADA, ALBERTA	3.8%	3.8%	.0%	.0%
PHILIPPINES	3.8%	.0%	.0%	.0%
MEXICO	.0%	.0%	6.3%	2.9%
KOREA	.0%	.0%	6.3%	2.9%
ITALY	.0%	3.8%	6.3%	.0%
CHINA	1.9%	3.8%	.0%	.0%
CANADA, ONTARIO	.0%	.0%	.0%	5.7%
AUSTRALIA	1.9%	.0%	6.3%	.0%
THE NETHERLANDS	.0%	.0%	6.3%	.0%
QUEBEC CANADA	.0%	.0%	6.3%	.0%
LIMA PERU	.0%	.0%	.0%	2.9%
ISRAEL	1.9%	.0%	.0%	.0%
HANOVER/GERMANY	1.9%	.0%	.0%	.0%
FINLAND	1.9%	.0%	.0%	.0%
CANADA, NEW BRUNSWICK	1.9%	.0%	.0%	.0%
BELGIUM	.0%	.0%	6.3%	.0%
Total	100.0%	100.0%	100.0%	100.0%

Please estimate the spending per-day in the Verde Valley for your travel party?

	Calendar quarter of survey			
	Quarter #1 - January - March	Quarter #2 - April - June	Quarter #3 - July - September	Quarter #4 - October - December
	Mean	Mean	Mean	Mean
Lodging-Camping	\$211	\$252	\$200	\$192
Restaurant & Grocery	\$89	\$96	\$94	\$90
Transportation including gas	\$60	\$76	\$75	\$74
Shopping or Arts and Crafts purchases	\$136	\$121	\$208	\$130
Recreation - Tour - Entrance - Permit fees	\$122	\$104	\$163	\$115
Spa - Spiritual - Metaphysical expenses	\$140	\$186	\$109	\$202
Other expenses	\$94	\$139	\$311	\$118

Tell us how interested you are in participating in the following activities?

	Calendar quarter of survey					
	Quarter #1 - January - March					
	Not at all interested	A little interested	Somewhat interested	Very interested	Extremely interested	Total
	Row N %	Row N %	Row N %	Row N %	Row N %	Mean
Fishing area rivers or creeks	58.7%	11.1%	14.1%	11.7%	4.5%	1.9
Hiking or walking trails	15.9%	11.2%	20.3%	31.2%	21.4%	3.3
Visiting cultural and historic sites	5.6%	9.0%	22.5%	44.2%	18.6%	3.6
Visiting national and state parks	5.5%	8.7%	18.3%	42.3%	25.1%	3.7
Visiting US Forest Service lands	12.4%	14.7%	28.4%	31.3%	13.2%	3.2
Visiting Art Galleries	17.4%	22.1%	26.8%	22.4%	11.2%	2.9
Rock climbing	64.0%	15.9%	11.0%	6.1%	3.0%	1.7
Back Road tours (Jeep OHV etc)	37.2%	16.2%	23.0%	15.3%	8.3%	2.4
Bird watching and observing wildlife	27.1%	17.1%	27.1%	21.2%	7.6%	2.7
Spiritual Metaphysical Vortexes	56.8%	15.8%	12.5%	5.7%	9.2%	1.9
Visiting area creeks or rivers	16.9%	16.6%	29.6%	26.6%	10.4%	3.0
Mountain Biking	68.8%	10.6%	10.0%	7.6%	3.0%	1.7
Recreation Vehicle (RV) stay	69.2%	7.9%	7.3%	3.9%	11.8%	1.8
Camping - Backpacking	60.9%	9.8%	12.3%	10.8%	6.2%	1.9
Playing golf	65.6%	9.3%	9.6%	7.2%	8.4%	1.8
Visiting Verde Valley wineries or wine tasting	37.0%	16.1%	23.8%	13.8%	9.4%	2.4
Shopping	9.6%	16.0%	30.9%	27.5%	16.0%	3.2
Resort or Spa experience	37.0%	18.8%	19.1%	16.4%	8.8%	2.4
Scenic train or Railway tour	26.8%	12.9%	25.5%	22.8%	12.0%	2.8
Special event	27.6%	6.9%	6.9%	20.7%	37.9%	3.3

Tell us how interested you are in participating in the following activities?

	Calendar quarter of survey					
	Quarter #2 - April - June					
	Not at all interested	A little interested	Somewhat interested	Very interested	Extremely interested	Total
	Row N %	Row N %	Row N %	Row N %	Row N %	Mean
Fishing area rivers or creeks	58.6%	14.9%	11.6%	9.2%	5.6%	1.9
Hiking or walking trails	11.8%	11.4%	24.3%	25.5%	27.0%	3.4
Visiting cultural and historic sites	8.9%	10.1%	20.2%	38.1%	22.6%	3.6
Visiting national and state parks	6.8%	8.3%	14.0%	40.4%	30.6%	3.8
Visiting US Forest Service lands	15.7%	11.0%	24.8%	28.0%	20.5%	3.3
Visiting Art Galleries	24.4%	22.5%	26.4%	15.5%	11.2%	2.7
Rock climbing	67.6%	12.6%	7.7%	8.5%	3.6%	1.7
Back Road tours (Jeep OHV etc)	40.2%	14.6%	16.5%	18.5%	10.2%	2.4
Bird watching and observing wildlife	34.4%	13.3%	21.5%	19.5%	11.3%	2.6
Spiritual Metaphysical Vortexes	51.6%	13.3%	13.7%	11.3%	10.1%	2.1
Visiting area creeks or rivers	18.7%	10.7%	24.4%	30.9%	15.3%	3.1
Mountain Biking	65.9%	12.9%	8.8%	8.0%	4.4%	1.7
Recreation Vehicle (RV) stay	72.6%	4.4%	4.4%	6.9%	11.7%	1.8
Camping - Backpacking	67.7%	9.7%	8.1%	8.1%	6.5%	1.8
Playing golf	65.5%	5.6%	10.0%	11.2%	7.6%	1.9
Visiting Verde Valley wineries or wine tasting	41.8%	15.1%	23.5%	13.9%	5.6%	2.3
Shopping	13.1%	11.9%	32.3%	28.5%	14.2%	3.2
Resort or Spa experience	40.0%	14.4%	15.6%	18.8%	11.2%	2.5
Scenic train or Railway tour	34.7%	9.5%	18.2%	23.1%	14.5%	2.7
Special event	53.7%	4.9%	4.9%	12.2%	24.4%	2.5

Tell us how interested you are in participating in the following activities?

	Calendar quarter of survey					
	Quarter #3 - July - September					
	Not at all interested	A little interested	Somewhat interested	Very interested	Extremely interested	Total
	Row N %	Row N %	Row N %	Row N %	Row N %	Mean
Fishing area rivers or creeks	62.3%	11.3%	13.2%	8.6%	4.6%	1.8
Hiking or walking trails	21.3%	11.3%	25.6%	24.4%	17.5%	3.1
Visiting cultural and historic sites	12.2%	6.7%	25.0%	41.5%	14.6%	3.4
Visiting national and state parks	11.9%	8.3%	19.6%	40.5%	19.6%	3.5
Visiting US Forest Service lands	22.8%	14.1%	24.8%	25.5%	12.8%	2.9
Visiting Art Galleries	27.7%	20.1%	29.6%	13.8%	8.8%	2.6
Rock climbing	68.4%	11.8%	10.5%	7.2%	2.0%	1.6
Back Road tours (Jeep OHV etc)	38.5%	13.5%	19.2%	21.8%	7.1%	2.5
Bird watching and observing wildlife	39.2%	16.3%	20.9%	16.3%	7.2%	2.4
Spiritual Metaphysical Vortexes	58.1%	11.6%	14.8%	10.3%	5.2%	1.9
Visiting area creeks or rivers	26.0%	16.2%	24.0%	24.0%	9.7%	2.8
Mountain Biking	70.4%	11.8%	7.9%	5.9%	3.9%	1.6
Recreation Vehicle (RV) stay	75.7%	10.1%	1.4%	6.8%	6.1%	1.6
Camping - Backpacking	70.0%	10.7%	6.7%	8.0%	4.7%	1.7
Playing golf	69.5%	13.6%	7.1%	7.8%	1.9%	1.6
Visiting Verde Valley wineries or wine tasting	45.8%	14.8%	20.6%	16.1%	2.6%	2.1
Shopping	10.8%	14.5%	34.9%	29.5%	10.2%	3.1
Resort or Spa experience	48.7%	11.7%	13.6%	18.8%	7.1%	2.2
Scenic train or Railway tour	25.2%	9.2%	16.0%	33.1%	16.6%	3.1
Special event	45.5%	4.5%	9.1%	27.3%	13.6%	2.6

Tell us how interested you are in participating in the following activities?

	Calendar quarter of survey					
	Quarter #4 - October - December					
	Not at all interested	A little interested	Somewhat interested	Very interested	Extremely interested	Total
	Row N %	Row N %	Row N %	Row N %	Row N %	Mean
Fishing area rivers or creeks	54.3%	12.7%	13.9%	12.7%	6.5%	2.0
Hiking or walking trails	16.1%	14.6%	20.5%	24.4%	24.4%	3.3
Visiting cultural and historic sites	7.3%	10.6%	22.4%	42.7%	17.1%	3.5
Visiting national and state parks	7.8%	8.9%	16.3%	39.9%	27.1%	3.7
Visiting US Forest Service lands	14.7%	12.6%	19.3%	31.9%	21.4%	3.3
Visiting Art Galleries	22.8%	20.3%	27.0%	19.9%	10.0%	2.7
Rock climbing	66.9%	11.6%	9.9%	7.0%	4.5%	1.7
Back Road tours (Jeep OHV etc)	42.6%	16.9%	15.6%	15.2%	9.7%	2.3
Bird watching and observing wildlife	30.2%	19.0%	18.7%	21.0%	11.1%	2.6
Spiritual Metaphysical Vortexes	57.7%	14.1%	13.3%	8.7%	6.2%	1.9
Visiting area creeks or rivers	19.0%	14.9%	23.4%	28.2%	14.5%	3.0
Mountain Biking	68.0%	13.1%	9.4%	7.0%	2.5%	1.6
Recreation Vehicle (RV) stay	69.6%	8.5%	4.9%	6.5%	10.5%	1.8
Camping - Backpacking	62.8%	9.7%	7.7%	13.8%	6.1%	1.9
Playing golf	69.1%	8.6%	6.6%	8.2%	7.4%	1.8
Visiting Verde Valley wineries or wine tasting	41.7%	16.3%	20.2%	15.5%	6.3%	2.3
Shopping	12.2%	12.6%	29.9%	29.1%	16.1%	3.2
Resort or Spa experience	44.0%	10.3%	18.9%	18.1%	8.6%	2.4
Scenic train or Railway tour	26.2%	11.5%	20.6%	25.4%	16.3%	2.9
Special event	47.5%	2.5%	5.0%	10.0%	35.0%	2.8

Did/Will you participate?

	Calendar quarter of survey			
	Quarter #1 - January - March	Quarter #2 - April - June	Quarter #3 - July - September	Quarter #4 - October - December
	Column N %	Column N %	Column N %	Column N %
Participate in - Visiting national and state parks	66.2%	69.1%	63.7%	64.5%
Participate in - Hiking or walking trails	64.7%	70.9%	58.2%	56.6%
Participate in - Shopping	54.9%	57.6%	65.9%	63.8%
Participate in - Visiting cultural and historic sites	59.3%	59.4%	63.7%	55.9%
Participate in - Visiting area creeks or rivers	37.7%	46.7%	50.5%	38.2%
Participate in - Visiting US Forest Service lands	41.7%	38.2%	33.0%	44.7%
Participate in - Visiting Art Galleries	38.2%	35.8%	42.9%	39.5%
Participate in - Scenic train or Railway tour	30.4%	28.5%	47.3%	34.9%
Participate in - Bird watching and observing wildlife	31.4%	35.8%	26.4%	32.2%
Participate in - Back Road tours (Jeep OHV etc)	26.5%	22.4%	27.5%	23.7%
Participate in - Resort or Spa experience	20.6%	20.6%	34.1%	24.3%
Participate in - Spiritual Metaphysical Vortexes	16.7%	20.6%	20.9%	21.1%
Participate in - Recreation Vehicle (RV) stay	16.2%	20.0%	13.2%	16.4%
Participate in - Visiting Verde Valley wineries or wine tasting	13.7%	10.9%	12.1%	17.8%
Participate in - Playing golf	11.8%	10.3%	12.1%	14.5%
Participate in - Fishing area rivers or creeks	13.2%	9.7%	12.1%	10.5%
Participate in - Camping - Backpacking	10.3%	7.9%	7.7%	12.5%
Participate in - Rock climbing	6.4%	4.8%	6.6%	10.5%
Participate in - Special event	5.9%	5.5%	4.4%	11.2%
Participate in - Mountain Biking	7.4%	6.7%	5.5%	7.2%
Total	100.0%	100.0%	100.0%	100.0%

Please mark all the attractions you have visited or plan to visit in the Verde Valley?

	Calendar quarter of survey			
	Quarter #1 - January - March	Quarter #2 - April - June	Quarter #3 - July - September	Quarter #4 - October - December
	Column N %	Column N %	Column N %	Column N %
Uptown Sedona	68.5%	69.7%	66.8%	68.5%
Historic Jerome	48.5%	48.0%	52.2%	55.4%
Montezuma Castle National Monument	40.5%	43.9%	45.7%	47.8%
Hillside Sedona - Hozho - Tlaquepaque	46.7%	41.7%	44.0%	42.8%
Red Rock State park	40.8%	44.6%	35.9%	40.2%
Sedona Airport scenic overlook	37.1%	48.0%	34.8%	37.0%
Verde Canyon Railway	27.2%	22.1%	41.8%	31.5%
Historic Cottonwood	29.6%	25.1%	31.0%	32.2%
Tuzigoot National Monument	26.7%	32.5%	30.4%	29.0%
Slide Rock State Park	26.4%	31.7%	32.1%	26.8%
Red Rock Crossing	30.1%	28.4%	23.4%	29.3%
Montezuma Well National Monument	25.3%	26.2%	29.9%	30.4%
Oak Creek Factory Outlets	25.1%	19.2%	32.1%	27.5%
Jerome State Historic Park	22.9%	25.8%	23.9%	25.4%
Cliff Castle Casino	22.9%	16.6%	28.8%	20.7%
Downtown Camp Verde	21.9%	17.3%	22.3%	21.4%
Vortex sites	17.9%	21.8%	24.5%	19.9%
Downtown Clarkdale	19.2%	14.0%	20.1%	21.0%
Out of Africa	18.9%	16.2%	15.2%	21.0%
Jerome Grand Hotel	14.9%	15.5%	15.2%	18.1%
Fort Verde State Park	14.4%	13.7%	20.1%	14.1%
Dead Horse State Park	16.8%	15.1%	10.3%	15.2%
Sedona Heritage Museum	11.7%	12.2%	15.2%	15.2%
Palatki and or Hononki Heritage Sites	10.9%	12.9%	13.6%	13.8%
Blazin M Ranch	7.5%	10.7%	19.0%	14.9%
West Fork Canyon	9.1%	12.2%	10.9%	10.9%
Gold King Mine	9.9%	9.2%	10.3%	11.2%
V Bar V Ranch Petroglyph Site	6.7%	7.4%	8.2%	7.6%
Mingus Mountain Recreational Area	9.3%	5.2%	3.3%	6.9%
Sycamore Canyon Wilderness	6.4%	3.7%	3.8%	7.2%

Does not sum to 100% due to multiple responses

On a scale of 1 to 10 where 1 is low and 10 is high indicate your overall satisfaction with your experience in the Verde Valley

	Calendar quarter of survey			
	Quarter #1 - January - March	Quarter #2 - April - June	Quarter #3 - July - September	Quarter #4 - October - December
	Column N %	Column N %	Column N %	Column N %
1	.0%	.0%	.0%	.3%
2	.0%	.4%	.0%	.0%
3	.5%	.4%	.0%	.0%
4	.5%	.4%	.6%	1.0%
5	2.9%	2.1%	1.1%	2.4%
6	3.7%	6.0%	1.7%	6.2%
7	10.8%	6.4%	9.4%	11.7%
8	28.0%	23.7%	26.1%	20.7%
9	19.5%	21.2%	22.8%	23.4%
10	34.0%	39.6%	38.3%	34.1%
Total	100.0%	100.0%	100.0%	100.0%

What is your gender?

	Calendar quarter of survey			
	Quarter #1 - January - March	Quarter #2 - April - June	Quarter #3 - July - September	Quarter #4 - October - December
	Column N %	Column N %	Column N %	Column N %
Male	58.8%	59.0%	65.7%	60.9%
Female	41.2%	41.0%	34.3%	39.1%
Total	100.0%	100.0%	100.0%	100.0%

Age of visitors recoded to ranges

	Calendar quarter of survey			
	Quarter #1 - January - March	Quarter #2 - April - June	Quarter #3 - July - September	Quarter #4 - October - December
	Column N %	Column N %	Column N %	Column N %
20 and under	1.4%	1.2%	1.2%	.4%
21 - 25 years	2.2%	2.3%	1.8%	4.9%
26 - 30 years	3.3%	3.5%	1.2%	4.2%
31 - 35 years	5.8%	6.6%	8.8%	6.4%
36 - 40 years	6.6%	8.6%	5.9%	9.1%
41 - 45 years	5.8%	8.6%	9.4%	10.2%
46 - 50 years	6.6%	13.3%	12.4%	10.6%
51 - 55 years	12.2%	14.8%	11.8%	12.8%
56 - 60 years	12.4%	11.3%	16.5%	14.0%
61 - 65 years	19.1%	14.8%	18.2%	13.2%
66 - 70 years	15.7%	9.0%	7.1%	6.8%
71 - 75 years	3.9%	3.9%	2.4%	4.2%
76 years and older	5.0%	2.0%	3.5%	3.4%
Total	100.0%	100.0%	100.0%	100.0%

Gender by age of visitors recoded to ranges

	Calendar quarter of survey							
	Quarter #1 - January - March		Quarter #2 - April - June		Quarter #3 - July - September		Quarter #4 - October - December	
	What is your gender		What is your gender		What is your gender		What is your gender	
	Male	Female	Male	Female	Male	Female	Male	Female
20 and under	1.4%	1.4%	.7%	1.9%	1.9%	.0%	.6%	.0%
21 - 25 years	2.4%	2.1%	2.8%	1.9%	1.9%	1.8%	5.7%	3.9%
26 - 30 years	3.3%	3.4%	4.9%	1.9%	.9%	.0%	4.4%	3.9%
31 - 35 years	7.1%	4.1%	6.3%	7.4%	8.5%	9.1%	5.0%	8.7%
36 - 40 years	7.1%	6.2%	9.0%	8.3%	6.6%	1.8%	9.4%	7.8%
41 - 45 years	6.6%	4.8%	7.6%	9.3%	11.3%	7.3%	8.8%	12.6%
46 - 50 years	8.0%	4.8%	13.9%	13.0%	13.2%	12.7%	11.9%	7.8%
51 - 55 years	12.7%	11.0%	13.9%	15.7%	10.4%	14.5%	11.3%	15.5%
56 - 60 years	10.8%	14.4%	8.3%	15.7%	19.8%	10.9%	15.7%	10.7%
61 - 65 years	18.4%	19.9%	17.4%	11.1%	13.2%	27.3%	13.2%	13.6%
66 - 70 years	15.1%	17.1%	11.1%	6.5%	6.6%	7.3%	6.9%	6.8%
71 - 75 years	3.3%	4.1%	2.1%	5.6%	3.8%	.0%	4.4%	3.9%
76 years and older	3.8%	6.8%	2.1%	1.9%	1.9%	7.3%	2.5%	4.9%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

How many people including yourself are in the travel party - Women

	Calendar quarter of survey			
	Quarter #1 - January - March	Quarter #2 - April - June	Quarter #3 - July - September	Quarter #4 - October - December
	Column N %	Column N %	Column N %	Column N %
1	75.6%	71.8%	71.1%	70.3%
2	19.9%	20.9%	20.6%	19.9%
3	3.1%	5.5%	4.4%	6.9%
4	.9%	1.1%	2.2%	.7%
5	.6%	.0%	1.1%	.7%
6	.0%	.7%	.6%	.7%
9	.0%	.0%	.0%	.4%
17	.0%	.0%	.0%	.4%
Total	100.0%	100.0%	100.0%	100.0%

How many people including yourself are in the travel party - Men

	Calendar quarter of survey			
	Quarter #1 - January - March	Quarter #2 - April - June	Quarter #3 - July - September	Quarter #4 - October - December
	Column N %	Column N %	Column N %	Column N %
1	83.9%	79.4%	84.8%	80.8%
2	13.6%	16.6%	13.2%	13.8%
3	1.5%	1.6%	.0%	1.5%
4	.6%	.4%	.7%	1.5%
5	.3%	.4%	.7%	.8%
6	.0%	1.6%	.7%	.4%
7	.0%	.0%	.0%	.4%
10	.0%	.0%	.0%	.4%
23	.0%	.0%	.0%	.4%
Total	100.0%	100.0%	100.0%	100.0%

How many people including yourself are in the travel party - Children under 18

	Calendar quarter of survey			
	Quarter #1 - January - March	Quarter #2 - April - June	Quarter #3 - July - September	Quarter #4 - October - December
	Column N %	Column N %	Column N %	Column N %
1	52.3%	45.1%	32.0%	51.1%
2	38.6%	35.3%	44.0%	37.8%
3	9.1%	17.6%	8.0%	6.7%
4	.0%	.0%	4.0%	2.2%
5	.0%	2.0%	.0%	2.2%
6	.0%	.0%	8.0%	.0%
10	.0%	.0%	4.0%	.0%
Total	100.0%	100.0%	100.0%	100.0%

Who is traveling with you on this trip?

	Calendar quarter of survey			
	Quarter #1 - January - March	Quarter #2 - April - June	Quarter #3 - July - September	Quarter #4 - October - December
	Column N %	Column N %	Column N %	Column N %
Family only	61.5%	64.5%	65.9%	63.4%
Family and friends	14.3%	14.5%	14.8%	15.8%
Friends only	14.3%	12.8%	11.5%	9.2%
Organized Tour Group	8.6%	5.5%	5.5%	9.2%
Business associates	1.0%	2.4%	.5%	2.1%
Nobody traveling alone	.3%	.3%	1.6%	.3%
Total	100.0%	100.0%	100.0%	100.0%

What is your annual household income?

	Calendar quarter of survey			
	Quarter #1 - January - March	Quarter #2 - April - June	Quarter #3 - July - September	Quarter #4 - October - December
	Column N %	Column N %	Column N %	Column N %
Less than \$15,000	.6%	2.0%	3.1%	1.7%
\$15,000 - \$24,999	.9%	1.6%	2.5%	1.2%
\$25,000 - \$34,999	5.0%	2.0%	3.1%	3.3%
\$35,000 - \$44,999	5.9%	8.1%	11.0%	9.1%
\$45,000 - \$54,999	11.8%	8.1%	11.7%	7.0%
\$55,000 - \$64,999	14.0%	8.9%	12.3%	10.3%
\$65,000 - \$74,999	8.7%	12.6%	14.1%	15.7%
\$75,000 - \$84,999	11.5%	10.2%	11.7%	10.3%
\$85,000 - \$94,999	9.3%	11.0%	7.4%	6.2%
\$95,000 or more	32.3%	35.4%	23.3%	35.1%
Total	100.0%	100.0%	100.0%	100.0%