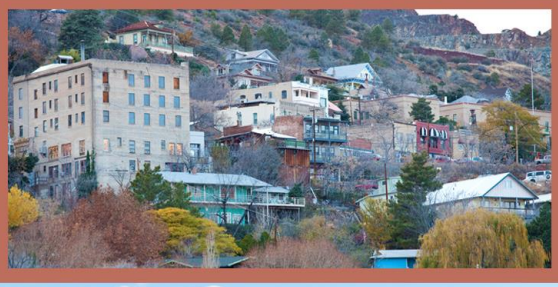
NORTHERN ARIZONA UNIVERSITY

The W. A. Franke College of Business

Verde Valley Visitor Survey

2014–2015



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Executive Summary

In 2014, the Verde Valley communities of Sedona, Cottonwood, Camp Verde, Clarkdale, and Jerome united to conduct a comprehensive survey of visitors to the area. It had been eight years since the last survey was undertaken in 2006-07, before the start of the Great Recession in Arizona. This 2014-15 survey was conducted after the regional economy began to recover, thus the two surveys represent an interesting comparison, both before and after the recession. Over this time period, communities throughout the Verde Valley have improved product offerings and visitor experiences, invigorated historic downtown areas, created a successful Arizona wine industry, added mountain biking/marathon events, and expanded rafting and tubing on the Verde River – the last of Arizona's wild and free-flowing rivers. All of these additions have attracted old and new visitors alike.

This regional research set out to understand and document changes in the Verde Valley visitor market, and to compare current market data to that in the earlier survey. This information will assist Verde Valley tourism and economic development directors with targeted marketing, additional product development, and advocacy for an industry that is critical to the health of the regional economy. Survey collection took place over a 12-month period from September 2014 through August 2015, during which a total of 2,406 surveys were completed. (an additional 312 surveys were collected in these communities using the same instrument during an aborted start in April and May 2014, and these valid surveys have been added for an overall total of 2,718.

Visitor Characteristics:

- Almost two-thirds of visitors were from out-of-state (63%), 28% were Arizona residents, and 8.5% were international visitors.
- The top origin states for out-of-state visitors were California, Wisconsin, Illinois, Florida, and Texas. In all, residents from 49 states were captured in the sample.
- Two-thirds of in-state resident visitors were from Maricopa County (66%), especially Phoenix, Scottsdale, and Mesa; about six percent (6%) were from Pima County, mainly Tucson; the rest (28%) were spread throughout the state; in all, 75 Arizona communities were in the sample.
- About one in 12 (8.5%) was an international visitor; two-thirds of these (68%) were from Canada, followed by those from the United Kingdom, Australia, and Japan. In all, 23 countries were captured in the sample.
- More than half were repeat visitors (53%) who averaged 8.3 prior visits; the remainder were first-time visitors (47%).
- Well over half (61%) of visitors traveled with family only; another 21% traveled in groups of family and friends.
- Average party size was three persons (3.1), with median of two persons; only 10% of parties traveled with children under 18 years.
- Two-thirds of visitors were overnight visitors (66%) while one-third were day visitors (34%).
- Average overnight length-of-stay in the Verde Valley was 3.0 nights.
- More than four in 10 visitors (44%) said their decision to visit the Verde Valley was influenced by friends or relatives, followed by the Internet at 13%.
- The single resource that was the most important for trip planning was the Internet (46%).
- Primary trip purpose was dominated by sightseeing (42%), followed by outdoor recreation (19%).

- For three-fourths of visitors (72%) the Verde Valley was the primary destination of their trip; for the remainder (28%) the visit was one stop on a longer trip. The primary destination for those on a longer trip was Grand Canyon.
- Lodging choice for almost half of visitors was hotels/motels/resorts (47%), followed by more than a fourth who stayed in timeshares (28%).
- The most popular visitor activities in the Verde Valley were: dining (engaged in by 59%), shopping (54%), hiking (43%), and visiting art galleries/museums (38%).
- The top three most-visited attractions in each Verde Valley community (ranked in declining order), were the following:
    - Camp Verde – Montezuma Castle/Well National Monument, Out of Africa, and Downtown Camp Verde.
    - Clarkdale – Verde Canyon Railroad, Tuzigoot National Monument, and the Copper Art Museum.
    - Cottonwood – Historic Old Town Cottonwood, Blazin' M Ranch, and Dead Horse Ranch State Park.
    - Jerome – Galleries/shops, Historic Jerome/Ghost Towns, Jerome State Historic Park.
    - Sedona – Red Rock Scenic Byway, Uptown Sedona, and Oak Creek Canyon.
- In 2014, $669 million in direct visitor spending produced to a total economic impact of $697 million, including $240 million in labor income, and $104 million in federal, state, and local taxes.

Visitor Satisfaction:

- Visitor satisfaction was high – 4.3 out of a possible 5.0.

Demographics:

- Average visitor age was 54.6 years, older than the 45.1 years of Arizona visitors generally in 2014.
- Slightly more females were represented in the sample (53%) than were males (47%).
- Average annual household income was quite high at $109,276, considerably higher than the 2014 average for Arizona visitors of $70,380.

Comparison to 2007 Verde Valley Visitor Study

In FY06, the AHRRC was commissioned by the Arizona Office of Tourism to conduct a very similar survey of visitors to the five major communities of the Verde Valley – Camp Verde, Clarkdale, Cottonwood, Jerome and Sedona. The 2007 survey process collected a sample of 1,284 surveys, whereas the 2014-15 survey collected more than twice as many – 2,718 completed surveys; the larger 2014 sample may account for some differences in findings between the two reports. In addition, while the survey instruments used for the 2007 and 2014 surveys were overall quite similar, many questions were differently worded or offered different response choices, thus all findings cannot be compared. The biggest change in the forms was a re-categorized and expanded list of attractions on the 2014 form, which were included to provide more in-depth information about visitor activities in a wider range of categories. Generally, the 2014 survey gathered more in-depth information about visitors in a variety of categories, while it discarded a few questions that had not been very helpful in 2007 (e.g., primary mode of transportation, since virtually everyone arrives in the Verde Valley by private/rental vehicle). In 2014, a concerted effort was made to collect additional surveys in communities other than Sedona, thus larger samples were obtained for Cottonwood and Jerome, while the samples for Clarkdale and Camp Verde were the same; the percent of the sample collected in Sedona shrank from 55% of total 2007 surveys to 35% of the 2014 total, though Sedona still accounted for the largest sample by far.

Some of the differences in findings between the two surveys were:

- In-state resident visitors declined slightly – from 31% in 2007 to 28% in 2014 – while domestic out-of-state visitors increased, from 59% in 2007 to 63% in 2014.
- Percentage of international visitors declined slightly, from 10% in 2007 to 8.5% in 2014.
- The top domestic origin states remained quite similar – in 2007, the top five states were California, Wisconsin, Illinois, New York and Washington; in 2014, the top five were California, Wisconsin, Illinois, Florida, and Texas.
- The percentage of in-state visitors from the Greater Phoenix area grew – from 57% in 2007 to 66% in 2014.
- Average party size grew – from 2.6 persons in 2007 to 3.1 persons in 2014.
- Travel party composition remained fairly constant – in 2007, 63% traveled with family groups; in 2014, 61% were in family groups.
- The Verde Valley as the primary destination grew from 69% in 2007 to 72% in 2014.
- Length-of-stay declined somewhat – from 3.7 nights in 2007 to 3.0 nights in 2014.
- The percentage of overnight and day visitors remained exactly the same – 66% overnight and 34% day visitors in both 2007 and 2014.
- The percent staying in hotels/motels/resorts shrank a bit, from 51% in 2007 to 47% in 2014; the percentage of visitors who stayed in timeshares, of which the Verde Valley has many, increased dramatically from 19% in 2007 to 28% in 2014.
- Average per-party per-day spending – in 2007, $423; in 2014, $654
- Visitor satisfaction was exactly the same in both studies – in 2007, 8.5 out of 10; in 2014, 4.3 of 5.0, which translates to 8.6 out of 10.
- Average age increased – from 52.8 years in 2007 to 54.6 years in 2014.
- Gender – in 2007 males outnumbered females 60% to 40%; in 2014 the sample found 53% female and 47% male.
- Annual household income increased substantially, from $72,310 in 2007 to $109,276 in 2014. The large differences in household income between 2007 and 2014 are the result of a new

annual household income scale used in the 2014 survey, therefore, 2014 household incomes are not comparable to 2007 household incomes.

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Verde Valley Visitor Study

Introduction

The Verde Valley communities of Camp Verde, Cottonwood, Sedona, Clarkdale and Jerome have long welcomed visitors to their communities. 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 the Coconino, Prescott, and Tonto 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. Yet, the Verde Valley has also become a destination in itself, with attractions that include the Historic Downtowns, The Verde Canyon Scenic Railroad, Sedona attractions, the historic mining town of Jerome and the fast developing wine industry. The Verde Valley has continued to add product and develop as a tourism destination, with many attractions and activities that encourage visitors to return.

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 more familiar 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.

Methods

The research methods used in this study are described in this section. This was a 12-month survey of visitors to the Verde Valley, and the length of time taken for this study is one of its greatest strengths. Visitor surveys can be conducted over a short time, for a period of weeks, or at a single special event (e.g., fair or festival). However, such brief glimpses of visitors are insufficient to provide the detailed, cross-sectional and seasonal data needed for a thorough analysis. It was, therefore, recommended that the Verde Valley collect surveys over an entire year to provide comprehensive, seasonal data, and to account for variations in length-of-stay, travel patterns, and types of visitors. The survey schedule was set up to begin collections in September 2014 and was completed in August 2015.

In order to collect data that would be comparable to that collected in the previous visitor survey, the survey instrument (Appendix A – two pages in length) was created consisting of standardized questions asked of visitors to all sites. Standardized questions included: visitor origins and party size; length-of-stay; prior visits and frequency of visits; primary reasons for the visit; information sources used; quality of the experience; expenditure categories; and, demographics (age and income).

All the surveys for the Verde Valley Visitor Study were completed as paper survey questionnaires by visitors while at the various survey sites in the Verde Valley. A sampling plan and survey schedule were created to guide survey locations in collections. Initially, staff at survey sites were instructed in how to

hand out surveys in a randomized fashion during at least one week out of each month, including both weekdays and weekends, in order to obtain representative samples. All sites were also provided with a sampling plan and prescribed distribution schedule with target numbers to collect each month. All completed surveys were returned to the AHRRC for automated data processing and analysis. Once the data were collected, the surveys were analyzed using SPSS™ software.

Sample Description

The sample described in this report consists of 2,718 surveys completed by visitors to the Verde Valley. The surveys were distributed across the communities at a variety of tourism businesses and attractions. The survey locations are arranged by the community that they are located in. Five communities in the Verde Valley were included in the survey: Camp Verde, Cottonwood, Clarkdale, Jerome and Sedona.

Not all survey sites provided the same number of surveys. Sedona collected one-third of all surveys as it has the greatest number of visitors while all other communities were assigned to collect approximately 17 percent of surveys. Not all attractions are open for year-round collection, while a number operate only on weekends in the slow winter season.

Sedona collected slightly more than one-third of all surveys (34.8%), followed by Cottonwood (22.1%), Jerome (19.3%), Camp Verde (14.2%) and Clarkdale (9.6%). The list of surveys collected by community is shown in Table 1.

Table 1. At which Verde Valley community did you receive this survey?

	Count	Percent (%)
Camp Verde	385	14.2%
Cottonwood	600	22.1%
Clarkdale	261	9.6%
Jerome	525	19.3%
Sedona	947	34.8%
Total	2,718	100.0%

An estimated 4,000 surveys were distributed by survey sites. The 2,718 returned surveys yields a response rate of 68%, which is well above industry standards for this type of survey. The margin of error for the total sample is +/- 5.7% with a 95% confidence level. The total number of surveys received for the Verde Valley visitor survey is adequate to describe tourist activity accurately during the time of the survey. The remainder of this report presents data from the 2,718 surveys of visitors to the Verde Valley area during the study period.

Each community chose their own survey locations in consultation with the survey team from the AHRRC. The list of survey sites in their relevant communities can be found in Table 2.

Table 2. Survey locations by Verde Valley communities

Camp Verde	Count	Percent (%)
Out of Africa	318	82.6%
Camp Verde Visitor Center	39	10.1%
Verde Valley Archeology Center	19	4.9%
Fort Verde State Park	9	2.3%
Total	385	100.0%
Cottonwood	Count	Percent (%)
Blazin' M Ranch	152	25.3%
Cottonwood Visitor Center	123	20.5%
Iron Horse Inn	84	14.0%
Old Town Center for the Arts	74	12.3%
Page Springs Cellars	71	11.8%
Alcantara Vineyard & Winery	46	7.7%
Old Town intercepts	31	5.2%
Arizona Stronghold Tasting Room	10	1.7%
Cottonwood Inn	9	1.5%
Total	600	100.0%
Clarkdale	Count	Percent (%)
Verde Canyon Railway	237	90.8%
Copper Art Museum	19	7.3%
Verde River Recreation	5	1.9%
Total	261	100.0%
Jerome	Count	Percent (%)
Jerome intercepts	525	100.0%
Sedona	Count	Percent (%)
Sedona Visitor Center/chamber	466	49.2%
Pink Jeep/Sedona Jeep	218	23.0%
Sedona Rouge	88	9.3%
Barlow Jeep Rentals	55	5.8%
McLean Meditation Center	51	5.4%
Hyatt	48	5.1%
Ramsey's Rocks & Minerals	21	2.2%
Total	947	100.0%

Survey collections by month in the Verde Valley area are shown in Table 3. The sampling plan weighted survey collections so that the largest number of surveys was collected during the busiest season – Summer – and the fewest surveys were collected during the slower Winter months. Originally, the survey started in April 2014, however, due to funding issues only data for April and May 2014 were collected. Once the funding issues were resolved the survey commenced again in September 2014. Surveys were then collected from September 2014 to August 2015, providing a complete year. The April and May 2014 data were included in the survey results as they are considered to be valid data collected during the survey process. The largest collections were in March, April, May, and July a traditionally busy time in the Verde Valley as well as the month of December. The least number of surveys were collected at the September and October start of the survey.

Table 3. Verde Valley monthly data collections

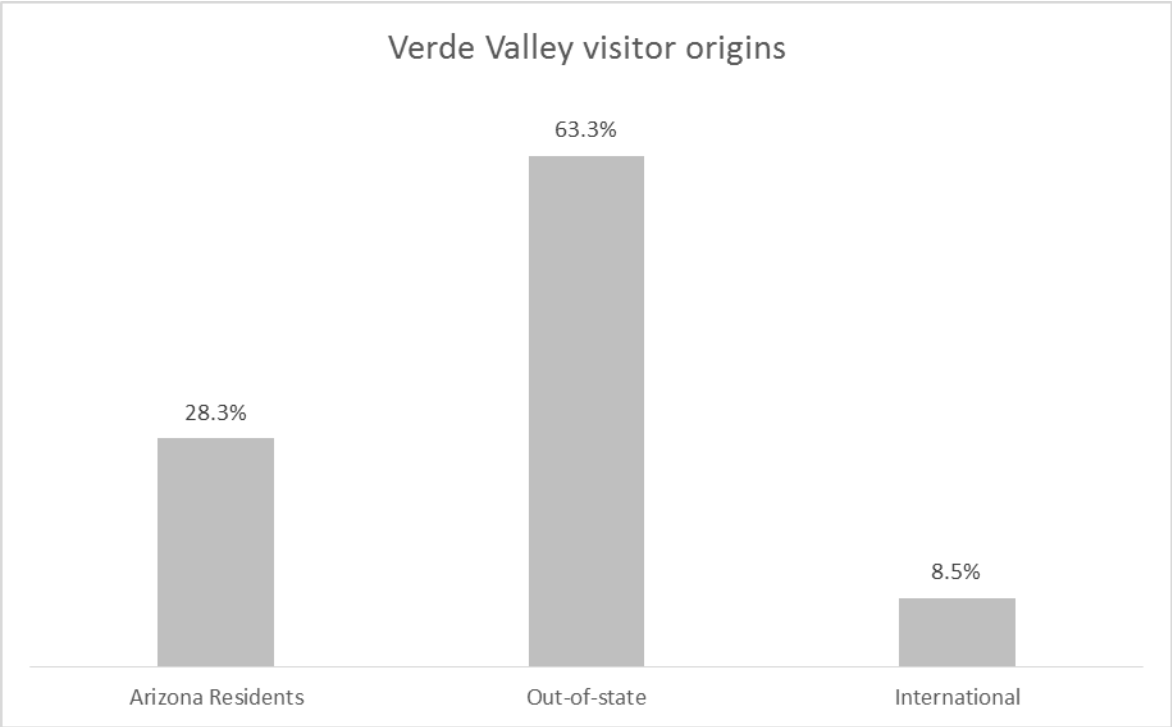
	Count	Percent (%)
April 2014	177	6.5%
May 2014	135	5.0%
September 2014	100	3.7%
October 2014	154	5.7%
November 2014	174	6.4%
December 2014	242	8.9%
January 2015	163	6.0%
February 2015	194	7.1%
March 2015	260	9.6%
April 2015	239	8.8%
May 2015	243	8.9%
June 2015	202	7.4%
July 2015	232	8.5%
August 2015	203	7.5%
Total	2,718	100.0%

Survey Results

Origin of visitors to the Verde Valley

Where do visitors come from to visit the Verde Valley? Responses were dominated by out-of-state visitors (63.3%), who represented almost two-thirds of the sample. In-state residents were, however, well represented with over a quarter of the sample (28.3%). Based on this data, we can say that Arizona residents visit the Verde Valley at the same rate as the statewide average, also 28 percent (Source: Arizona Office of Tourism, *2014 Domestic Visitor Profile*, Longwoods International and Tourism Economics). Less than one tenth of visitors to the Verde Valley were international visitors (8.5%). It should be stated that for reasons of cost and simplicity, the survey instrument was not offered in every language, but in English only. It was also rarely possible to intercept tour bus visitors, and thus international visitors to Arizona are undoubtedly underrepresented in the sample. See Figure 1.

Figure 1. Origin of visitors to the Verde Valley



Origin of domestic visitors to the Verde Valley

Arizona dominated all other U.S. states as the top source of domestic visitors (32%) to the Verde Valley. Other states that sent large numbers of visitors included: California (12%), Wisconsin (4%), Illinois (4%), and Florida (4%). This set of states is typical of visitors to Arizona generally and is consistent with prior origins data for Verde Valley visitors. In all, the top 10 states account for 70 percent of total domestic visits, though visitors from 49 states and the US Virgin Islands were represented in the survey. See Table 4 below.

Table 4. Top-ten states of origin of domestic visitors to the Verde Valley

	Count	Percent (%)
Arizona	733	31.6%
California	272	11.7%
Wisconsin	102	4.4%
Illinois	93	4.0%
Florida	81	3.5%
Texas	77	3.3%
New York	70	3.0%
Pennsylvania	69	3.0%
Michigan	69	3.0%
Washington	64	2.8%
Top-ten states	1,630	70.2%

Origin of Arizona visitors to the Verde Valley

Among in-state visitors, Maricopa County provided two-thirds (66.4%) of all in-state visitors to the Verde Valley. The top 10 communities are shown in Table 5; especially large were the communities of Phoenix (18%), Scottsdale (8%) and Mesa (7%). A smaller cohort of visitors came from Pima County (6% total), specifically Tucson (3.5%). Prescott and Prescott Valley in Central Arizona contributed seven percent (7.2%). These top ten cities account for well over half of in-state visitors (61%). See the results in Table 5; the complete list of in-state origins is in Appendix F.

Table 5. Top-ten Arizona cities of origin of visitors to the Verde Valley

	Count	Percent (%)
Phoenix	129	18.2%
Scottsdale	56	7.9%
Mesa	49	6.9%
Glendale	38	5.4%
Peoria	33	4.6%
Prescott	31	4.4%
Gilbert	28	3.9%
Tucson	25	3.5%
Chandler	24	3.4%
Prescott Valley	20	2.8%
Top-ten cities	433	61.0%

Origin of International visitors to the Verde Valley

International visitors accounted for nine percent of the sample (213 visitors). Canada (68%) accounted for the largest percentage of international visitors to the Verde Valley by far; visitors from the United Kingdom were a distant second (13%). Together these two countries accounted for four-fifths of all international visitors to Verde Valley. Australia (3%) provided the next largest visitor volume, followed by Japan (2%). It is notable that most international visitors were from English-speaking countries, and that these visitors are very typical of origins for Arizona tourism generally. It should be stated that it was beyond the scope and cost of this survey to translate the survey instrument into all languages; thus, this sample represents an undercount of total international visitors to the Verde Valley. In total, 23 countries were represented in the sample. All origins for international visitors are listed in Table 6.

Table 6. Origin of International visitors to the Verde Valley

	Count	Percent (%)
Canada	145	68.1%
United Kingdom	28	13.1%
Australia	6	2.8%
Japan	5	2.3%
Mexico	4	1.9%
Germany	3	1.4%
New Zealand	3	1.4%
India	2	0.9%
Namibia	2	0.9%
Netherlands	2	0.9%
Brazil	1	0.5%
China	1	0.5%
Colombia SA	1	0.5%
Costa Rica	1	0.5%
Denmark	1	0.5%
France	1	0.5%
Hungary	1	0.5%
Italy	1	0.5%
Russia	1	0.5%
Switzerland	1	0.5%
Taiwan	1	0.5%
Turkey	1	0.5%
Uruguay	1	0.5%
Total	213	100.0%

Is this your first trip to the Verde Valley?

The sample was fairly evenly split between first-time and repeat visitors. Repeat visitors, or those who have visited the Verde Valley before, accounted for slightly less than half of the sample (47.2%); the remaining half were first-time visitors (52.8%). A follow-up question asked repeat visitors how many times they had visited the Verde Valley; the average was eight (8) visits, and the median was four (4) previous visits. This percentage of returning visitors is far higher than the in-state sample (28%) suggesting that out-of-state residents also return to the Verde Valley to visit the many attractions in the area, or to engage in outdoor recreation, special events, or climate relief to escape the heat of southwestern deserts. See Table 7.

Table 7. Is this your first trip to the Verde Valley?

	Count	Percent (%)
Yes	1,271	47.2%
No	1,420	52.8%
Total	2,691	100.0%
	Mean	Median
If not, how many times have you visited?	8.3	4.0

Who is traveling with you on this trip?

What was the composition of visitor parties to the Verde Valley? Those traveling as family groups accounted for three of every five visitor parties (61%), followed by those traveling in parties of family and friends (21%). A smaller cohort traveled with friends only (12%), or traveled alone (4%). The remainder traveled with a tour group (0.7%) or business associates (0.2%). See Table 8.

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

	Count	Percent (%)
Family only	1,520	61.3%
Family and Friends	530	21.4%
Friends only	306	12.3%
Nobody, traveling alone	101	4.1%
Organized group	17	0.7%
Business Associates	6	0.2%
Total	2,480	100.0%

How many people are traveling with you on this trip?

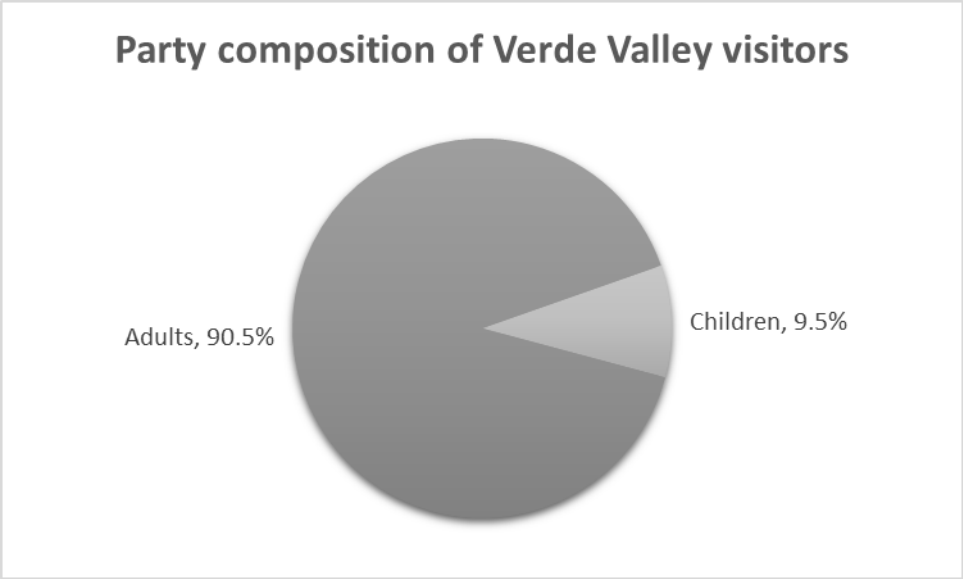
The average visitor party to the Verde Valley consisted of three (3.1) people, while the median party size was two persons. Large visitor parties of more than nine people accounted for 2% of the sample. These large parties were all associated with tour groups, in which the average party size was 30 persons. Children were found in 9.5 percent of all visitor parties; those with children in the party averaged 1.2 children (median of one child).

The average numbers of women, men and children in each party were 1.7, 1.4, and 1.2, respectively; the medians were one each. See Table 9.

Table 9. How many people are traveling with you on this trip?

	Mean	Median
Number of women	1.7	1.0
Number of men	1.4	1.0
Number of children under 18 years of age	1.2	1.0

Figure 2. Party Composition



How long do you plan to spend in the Verde Valley?

Based on the sample, two-thirds of visitors to the Verde Valley (66%) were overnight visitors, while one-third (34%) were day visitors. On average, overnight visitors spent three nights (3.0), in the Verde Valley, slightly less than the average overnight length-of-stay for Arizona visitors generally of 3.7 days in 2014 (Source: Arizona Office of Tourism, *2014 Arizona Domestic Overnight Visitors,* Tourism Economics and Longwoods International). See Table 10.

Table 10. Visitor breakdown – day or overnight visitors

	Count	Percent (%)
Overnight Visitors	1,798	66.2
Day Visitors	920	33.8
Total	2,718	100

What most influenced your decision to visit the Verde Valley?

What information is the most influential for Verde Valley visitors? Many forms of advertising and sources of information are available to potential visitors, to narrow down choices and understand what is most influential, respondents were asked to choose only one response on the survey. Overall, recommendations from friends and relatives were the most dominant information source (44%), followed by "Other" (35%), though no explanation for other was collected. Third on the list was the Internet (13%). A minority of visitors (7.3%) were influenced by travel agents or print media: Travel Agent/Tour Operator (3%), Magazines/Newspaper articles (3%), and Magazine/TV ad (1%). See Table 11 below.

Table 11. How did you learn about the Verde Valley?

	Count	Percent (%)
Friend or relative	1,137	44.0%
Other	912	35.3%
Internet	346	13.4%
Travel Agent/Tour Operator	85	3.3%
Magazine/Newspaper article	78	3.0%
Magazine/TV ad	26	1.0%
Total	2,584	100.0%

The next question, what single resource was the most important in planning/researching your trip to the Verde Valley is a follow-up on the previous question, what most influenced your visit. This question asked what resources were used by visitors to find out what to do and where to stay and eat. The Internet (46%) is the predominant single resource used in planning visits to the Verde Valley. The Internet was followed closely by friends or relatives (26%), and other, which is undefined (16%). About one in 10 visitors (11.1%) used sources, such as: Travel brochures (4%), Guidebooks (4%), and information from a Travel agent/tour operator (3%). See Table 12.

Table 12. What single resource was most important in planning/researching your trip to the Verde Valley?

	Count	Percent (%)
Internet	1,155	46.4%
Friends or relatives	652	26.2%
Other	404	16.2%
Travel brochure	107	4.3%
Guidebook	100	4.0%
Travel Agent/Tour Operator	69	2.8%
Total	2,487	100.0%

What is the primary purpose of your current visit to the Verde Valley?

The largest number of visitors (42%) came to the Verde Valley for sightseeing. After sightseeing, the next most important activity was outdoor recreation – 19% (including hiking, golf, kayaking, biking, etc.). One-tenth (12%) of visitors came for other purposes, which were not enumerated and a further one-tenth (10%) were visiting friends and relatives. Remaining trip purposes included: spiritual/metaphysical/wellness (4%), cultural/historical (3%), wine tasting (3%), special event (3%), shopping (2%), business (2%), and birding, archeology and casino gaming, less than 1 percent combined. See Table 13.

Table 13. What is the primary purpose of your current visit to the Verde Valley?

	Count	Percent (%)
Sightseeing	940	41.5%
Outdoor recreation (hiking, golf, kayaking, biking etc.)	427	18.8%
Other	269	11.9%
Visiting friends and relatives	233	10.3%
Spiritual/Metaphysical/Wellness	81	3.6%
Cultural/Historical	73	3.2%
Wine tasting	71	3.1%
Special event (festival, exhibition, concert etc.)	70	3.1%
Shopping	52	2.3%
Business	34	1.5%
Birding	9	0.4%
Archeology	6	0.3%
Casino gaming	2	0.1%
Total	2,267	100.0%

Is the Verde Valley the primary destination of your trip?

Almost three-fourths of respondents (72%) indicated that the Verde Valley was the main destination of their trip. The remainder (28%) said the visit to the Verde Valley was one stop on a longer trip. See Table 14.

Table 14. Is this trip to the Verde Valley …?

	Count	Percent (%)
Your main destination	1,796	72.4%
One stop on a longer trip	683	27.6%
Total	2,479	100.0%

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

For those who included the Verde Valley on a trip to another primary destination, "Other" was most often selected among the six choices. A summary of these "Other" places is included in Table 16 which follows. Among the five specific places provided as choices on the survey, Grand Canyon was selected most often by a quarter (25%) of travelers, closely followed by Phoenix at 22%.

Table 15. If not, what location is the primary destination of your trip?

	Count	Percent (%)
Other	267	34.3%
Grand Canyon	195	25.0%
Phoenix	174	22.3%
Las Vegas	66	8.5%
Flagstaff	55	7.1%
Prescott	22	2.8%
Total	779	100.0%

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

Scottsdale (6%) was most often provided as the main destination of those filling in the "Other" destination category. Scottsdale was followed by Tucson (3%), Mesa (3%), Williams (2%), and a number of other destinations spread across Arizona, New Mexico, and Utah. See Table 16 for the top ten "Other" primary destinations; the complete list is in Appendix B.

Table 16. If not, what location is the primary destination of your trip-other?

	Count	Percent (%)
Scottsdale	18	5.9%
Tucson	10	3.3%
Mesa	9	3.0%
Williams	5	1.6%
Payson	4	1.3%
Page	4	1.3%
Zion National Park, UT	3	1.0%
Santa Fe, NM	3	1.0%
Dewey	3	1.0%
Casa Grande	3	1.0%
Top-ten locations	62	20.4%

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

The largest group of visitors (47%) stayed in either a hotel, motel or resort while in the Verde Valley, a positive finding that reflects the appeal of the Verde Valley's lodging sector. A significant one-fourth of visitors (28%) stayed in timeshare properties, while the remainder stayed in the homes of friends or family (9%), campgrounds or RV parks (8%), Bed & Breakfasts (5%), other properties (4%), and second homes (2%). The majority of the 4% staying in other accommodations consisted of home vacation rentals, such as VRBO.com. See Table 17. The total list of other accommodations is in Appendix C.

Table 17. If you are staying in Verde Valley, what type of lodging are you using?

	Count	Percent (%)
Hotel-Motel-Resort	980	47.3%
Timeshare Property	586	28.3%
Home of Friends-Family	178	8.6%
Campground-RV Park	173	8.3%
Bed & Breakfast	98	4.7%
Other	86	4.1%
Second Home	48	2.3%

Does not add up to 100% because of multiple responses.

Attractions and Activities you participated in while on your visit to the Verde Valley

Visitors to the Verde Valley were asked about the attractions they visited and the activities they participated in during their visit. To assist the visitor and for ease of analysis, these attractions and activities were grouped into six discreet categories: (1) General Verde Valley attractions that could be found in many locations; (2) Camp Verde attractions; (3) Clarkdale attractions; (4) Cottonwood attractions; (5) Jerome attractions; and, (6) Sedona attractions.

General Verde Valley Attractions

The first grouping, general attractions, consisted of the many leisure opportunities found in the Verde Valley. Of these, dining (59%) was the chief activity in which visitors engaged, as it is in many visitor surveys, and also emphasizes the fact that the Verde Valley has a rich and varied dining scene. Shopping (54%) was the second most popular activity, engaged in by more than half the sample. Roughly two of five Verde Valley visitors (43%) indicated that they went hiking, which was followed by visiting art galleries and museums (38%). Visiting area rivers and creeks was another important activity, engaged in by one third of visitors (33%). About one-fourth of all visitors said they visited wineries and tasting rooms (24%) – an impressive finding for the Verde Valley wine industry that is still relatively new. Another one-fourth of visitors went on Jeep and off-highway vehicle tours (24%) during their visit. Activities that received less participation but are still important to Verde Valley tourism included: bird watching or observing wildlife (13%); attending events and festivals (10%); spa visits (10%); camping/RV stays in local campgrounds (7%); golfing (7%); mountain or road biking (5%), and, rock climbing (4%). See the list of general Verde Valley attractions in Table 18. A list of special events attended is provided in Appendix E.

Table 18. Identify the Activities you participated in during this visit to the Verde Valley

Activities	Count	Percent (%)
Dining	1,610	59.2%
Shopping	1,456	53.6%
Hiking	1,161	42.7%
Art Galleries/Museums	1,033	38.0%
Area Rivers or Creeks	889	32.7%
Wineries/Tasting Rooms	654	24.1%
Jeep/Off-Highway Vehicle Tours	651	24.0%
Birdwatching and Observing Wildlife	351	12.9%
Events/Festivals	268	9.9%
Spa	266	9.8%
Camping/RV stay	189	7.0%
Golfing	182	6.7%
Mountain or Road Biking	135	5.0%
Rock Climbing	102	3.8%

Does not add up to 100% because of multiple responses

Lists of specific tourist attractions were also provided for each community – Camp Verde, Clarkdale, Cottonwood, Jerome and Sedona – and respondents were asked to check all attractions they visited. This process produced Table 19, which presents all Verde Valley attractions in rank order from the most-visited to the least-visited. For example, the most-visited attractions in the Verde Valley were the Red Rock Scenic Byway, Uptown Sedona, and Oak Creek Canyon – each of which was visited by 42 percent of visitors. See the complete list below.

Table 19. Identify the Specific Attractions you visited in the Verde Valley

	Visited/participated	
Verde Valley Attractions	Count	Percent (%)
Red Rock Scenic Byway	1,153	42.4%
Uptown Sedona	1,143	42.1%
Oak Creek Canyon	1,133	41.7%
Jerome Galleries/Shops	1,066	39.2%
Chapel of the Holy Cross	1,021	37.6%
Historic Jerome/Ghost Towns	855	31.5%
Tlaquepaque/Hillside	797	29.3%
Sedona Airport Scenic Overlook	749	27.6%
Historic Old Town Cottonwood	716	26.3%
Montezuma Castle/Well National Monument	690	25.4%
Slide Rock and/or Red Rock State Park	689	25.3%
Vortex Sites	570	21.0%
Red Rock Crossing	553	20.3%
Verde Canyon Railroad	527	19.4%
Out of Africa	497	18.3%
Sedona Resort	494	18.2%
Jerome State Historic Park	457	16.8%
Tuzigoot National Monument	382	14.1%
Wineries/Tasting Rooms	378	13.9%
Downtown Camp Verde	320	11.8%
Blazin' M Ranch	282	10.4%
Palatki and/or Hononki Heritage Sites	252	9.3%
Fort Verde State Park	235	8.6%
Cliff Castle Casino	221	8.1%
Dead Horse Ranch State Park	211	7.8%
Old Town Center for the Arts	207	7.6%
Sedona Heritage Museum	200	7.4%
Copper Art Museum	184	6.8%
Verde Valley Archeology Center	140	5.2%
Clarkdale Arts & Entertainment District	121	4.5%
Music/Special Events	105	3.9%
Old Jail Trail	92	3.4%
Verde River Access Point	88	3.2%

Visitation to Verde Valley attractions was also calculated within each community, and this information is presented in the sections that follow, beginning with Camp Verde.

Camp Verde Attractions

Within the Town of Camp Verde the most-visited tourist attraction was Montezuma Castle/Well National Monument, which was visited by half (51%) of all Camp Verde visitors. The national monument was followed by visits to the Out of Africa wildlife park (37%), which was visited by more than a third of visitors. Downtown Camp Verde hosted one-fourth of visitors (24%) followed by visits to Fort Verde State Park (17%), Cliff Castle Casino (16%), and the Verde Valley Archeology Center (10%). See Table 20.

Table 20. Identify attractions you visited in Camp Verde

	Count	Percent (%)
Montezuma Castle/Well National Monument	690	51.0%
Out of Africa	497	36.8%
Downtown Camp Verde	320	23.7%
Fort Verde State Park	235	17.4%
Cliff Castle Casino	221	16.3%
Verde Valley Archeology Center	140	10.4%

Does not add up to 100% because of multiple responses

Clarkdale Attractions

In the Town of Clarkdale the most-visited attraction was the Verde Canyon Railroad (57%), a scenic train that follows the Verde River. Next in importance was Tuzigoot National Monument, visited by two of every five visitors (41%). One in five visitors went to the Copper Art Museum (20%), a positive finding for a relatively new museum which features the history of copper and displays of copper art, and is located in the historic Clarkdale school. Finally, fewer visitors went to the Clarkdale Arts & Entertainment District (13%) or used the Verde River access point (10%). See Table 21.

Table 21. Identify attractions you visited in Clarkdale

	Count	Percent (%)
Verde Canyon Railroad	527	57.0%
Tuzigoot National Monument	382	41.3%
Copper Art Museum	184	19.9%
Clarkdale Arts & Entertainment District	121	13.1%
Verde River Access Point	88	9.5%

Does not add up to 100% because of multiple responses

Cottonwood Attractions

The most-visited attraction in the Town of Cottonwood was Historic Old Town Cottonwood, with its tasting rooms, restaurants and antique shops. The area has undergone a renaissance in recent years, with preservation of historic buildings, trendy shops and restaurants, and a growing number of popular wine tasting rooms. Historic Old Town Cottonwood was visited by two-thirds (67%) of all visitors to that community. Next in importance were visits to the Blazin' M Ranch entertainment venue, representing 26 percent of Cottonwood visitors, followed by Dead Horse Ranch State Park (20%), the Old Town Center for the Arts (19%), and the Old Jail Trail (9%). See Table 22.

Table 22. Identify attractions you visited in Cottonwood

	Count	Percent (%)
Historic Old Town Cottonwood	716	67.1%
Blazin' M Ranch	282	26.4%
Dead Horse Ranch State Park	211	19.8%
Old Town Center for the Arts	207	19.4%
Old Jail Trail	92	8.6%

Does not add up to 100% because of multiple responses

Jerome Attractions

The next group of attractions were in the historic mining town of Jerome with its many well-known art galleries and shops, historic home and ghost tours, Jerome State Historic Park, and wineries and tasting rooms. Jerome is a well-known tourist destination in the Verde Valley and has long had a reputation as an arts community.

More than two-thirds of visitors to Jerome (70%) indicated that they visited the town's art galleries and shops. Visits to galleries and shops were followed fairly closely by Historic Jerome and ghost town tours, which were visited by more than half of visitors. Slightly less than one-third of visitors (30%) visited Jerome State Historic Park, while one-fourth of visitors said they patronized one of the many wineries and tasting rooms (25%). Rounding out the list of Jerome activities, were music or special events, attractions indicated by less than one in 10 visitors (7%). See Table 23.

Table 23. Identify attractions you visited in Jerome

	Count	Percent (%)
Galleries/Shops	1,066	69.8%
Historic Jerome/Ghost Towns	855	56.0%
Jerome State Historic Park	457	29.9%
Wineries/Tasting Rooms	378	24.7%
Music/Special Events	105	6.9%

Does not add up to 100% because of multiple responses

Sedona Attractions

The last set of attractions were in the City of Sedona, which is the most prominent destination in the Verde Valley having both outstanding scenery along with sophisticated resorts and outstanding restaurants.

Three attractions were essentially tied in the percentage of visitors they attracted. These included the Red Rock Scenic Byway; with its major improvements on Highway 179 it makes an impressive gateway into Sedona (selected by 59% of visitors). Equally important was the major tourist district and shopping area of Uptown Sedona (also visited by 59%), along with Oak Creek Canyon which provides visitors with outstanding Red Rock views and picnic and camping sites along the banks of Oak Creek (58%). Close behind these three attractions was the iconic Chapel of the Holy Cross, which was also visited by more than half of Sedona visitors (53%).

A middle but important set of attractions were also visited by large percentages: Tlaquepaque/Hillside shopping areas attracted 41 percent of visitors, the Sedona Airport Scenic Overlook was visited by well over one-third of all visitors (39%), and the area's two state parks, Red Rock and Slide Rock, were visited by more than a third of Sedona visitors (36%). Next were seekers of the renowned Vortex Sites around Sedona (29%), and to Red Rock Crossing recreation area (29%). A fourth of all visitors indicated that they visited (and perhaps stayed at) one of the area resorts (25%). The fewest visitors went to the more remote Forest Service rock art sites of Palatki and Hononki (13%) or the Sedona Heritage Museum (10%). See Table 24 for the complete list.

Table 24. Identify attractions you visited in Sedona

	Count	Percent (%)
Red Rock Scenic Byway	1,153	59.3%
Uptown Sedona	1,143	58.8%
Oak Creek Canyon	1,133	58.3%
Chapel of the Holy Cross	1,021	52.5%
Tlaquepaque/Hillside	797	41.0%
Sedona Airport Scenic Overlook	749	38.5%
Slide Rock and/or Red Rock State Park	689	35.5%
Vortex Sites	570	29.3%
Red Rock Crossing	553	28.5%
Resort	494	25.4%
Palatki and/or Hononki Heritage Sites	252	13.0%
Sedona Heritage Museum	200	10.3%

Does not add up to 100% because of multiple responses

Please estimate your expenditures while in the Verde Valley

Visitor spending is an important source of income for Verde Valley tourism businesses and for local governments. Many tourist activities are also subject to additional local taxes, such as the bed/lodging tax, which is typically used to fund local services, such as tourism marketing, or parks and recreation. When considering visitors to the Verde Valley, the largest average per-party per-day expenditure was for lodging ($191). Next were restaurant/food and groceries ($112), followed by recreation/tour/entrance expenditures ($94), followed by shopping/souvenirs ($92). Shopping was followed by "other" expenditures and transportation costs including gasoline ($60, respectively) and Spa/spiritual/metaphysical ($46) completed the list. Lodging expenditures were the highest in average amounts, but not the highest in the percentage of visitors who reported these expenditures – 78% of respondents said they had restaurant and grocery expenditures, followed by 69 percent who had transportation expenditures. Those with transportation expenditures were followed shopping-souvenir expenses 65%), as well as those with recreation/tour/entrance fees/permits and lodging/camping (61% respectively) accounted for more than half of the sample. In terms of percentage of spending, Spa/spiritual/metaphysical (11%) and other expenditures (5%) (mainly for sundries, tips, postcards and entertainment) were reported by far fewer visitors. See right-most column of Table 25.

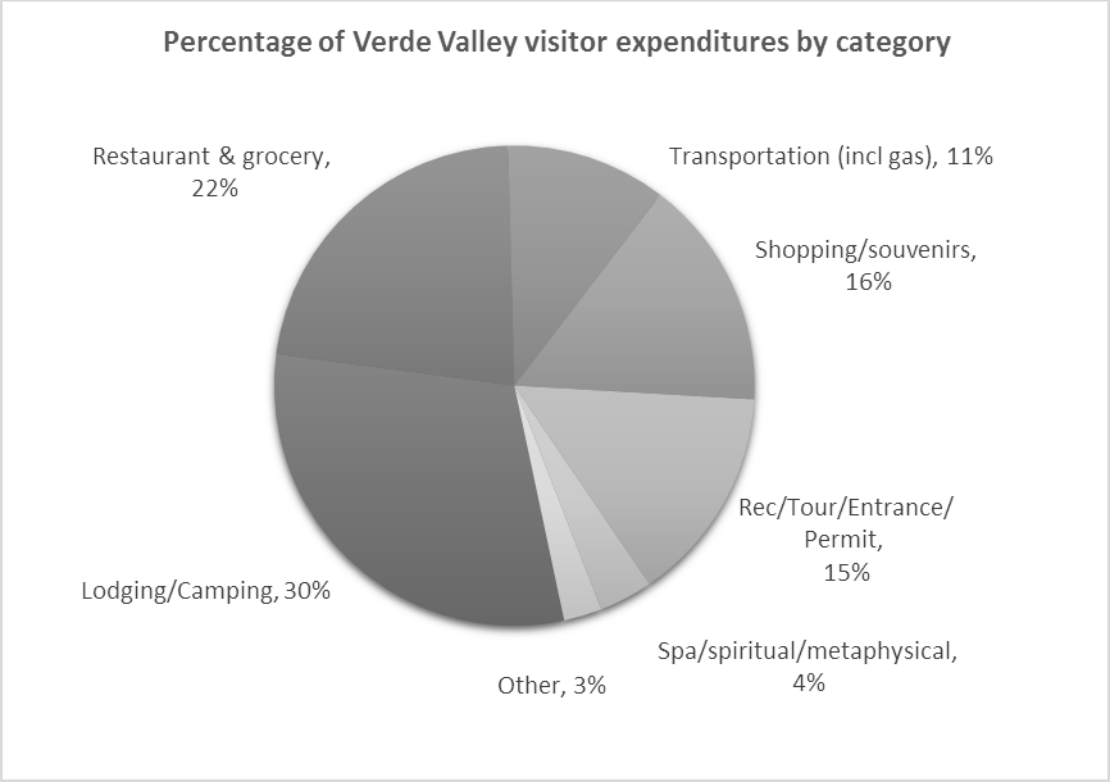
The few respondents who indicated they had "other" expenditures were asked to specify these; most were for gifts and contributions, and the complete list is in Appendix D. See Table 25.

Table 25. Estimate the amount of money your travel party is spending per day at Verde Valley tourism businesses

	Mean	Median	Percent w/ expenditure
Lodging/Camping	$191	$125	61%
Restaurant & grocery	$112	$80	78%
Transportation (including gas)	$60	$32	69%
Shopping/souvenirs	$92	$50	65%
Recreation/Tour/Entrance/Permit fees	$94	$50	61%
Spa/spiritual/metaphysical	$46	$38	11%
Other	$60	$49	5%

How is the tourist dollar spent in the Verde Valley? Based on the *weighted* average of visitor expenditures, the largest percentage of the tourist dollar was spent on lodging (30%), followed by restaurant/food and groceries (22%), shopping for souvenirs (16%), and recreation/tour/entrance fees (15%), followed by transportation including gas (11%), then Spa/spiritual/metaphysical (4%), and other expenditures (3%). See Figure 3.

Figure 3: Percentage of the visitor dollar spent in the Verde Valley



Overall how satisfied are you with your visit to the Verde Valley?

Visitors to the Verde Valley were asked to rate their overall satisfaction with the area's attractions, activities, accommodations, entertainment, shopping, food and drink, prices, and availability of visitor information in the Verde Valley. The experience that received the highest mean satisfaction score, 4.6 out of a possible 5.0, was for visitor satisfaction with area attractions; clearly the Verde Valley contains world-class attractions that are a draw for visitors. Three other factors were very highly rated, at 4.5 each, including: the variety of visitor activities (4.5), satisfaction with lodging/accommodations (4.5), and the availability of visitor information (4.5). These were followed closely by satisfaction with food and drink (4.4), as well as entertainment and shopping (4.1 rankings). The lowest satisfaction rating was for the price of visitor experiences in the Verde Valley, which had a mean score of 3.8. Overall, the mean satisfaction score for all experiences was 4.3 out of a possible 5.0. See Table 26.

Table 26. Overall how satisfied are you with your experiences in the Verde Valley

	Low (1)	Somewhat Low (2)	Neither High nor Low (3)	Somewhat High (4)	High (5)	Mean
Attractions	0.1%	0.4%	5.6%	27.8%	66.1%	4.6
Activities	0.3%	0.8%	7.9%	29.6%	61.4%	4.5
Accommodations	0.5%	0.8%	9.4%	28.4%	61.0%	4.5
Entertainment	1.3%	3.4%	20.8%	31.7%	42.8%	4.1
Shopping	1.1%	3.8%	19.0%	34.0%	42.2%	4.1
Food & Drink	0.4%	1.3%	10.8%	37.1%	50.4%	4.4
Prices	1.8%	5.7%	26.5%	38.9%	27.0%	3.8
Visitor Information	0.6%	1.2%	8.8%	23.6%	65.7%	4.5

Demographics

Age of visitors

The average age of visitors to the Verde Valley was 54.6 years, with a median age of 58 years, both of which are older than the average age of Arizona visitors generally, which is 45.1 years (Source: Arizona Office of Tourism, *2014 Arizona Domestic Overnight Visitors,* by Tourism Economics and Longwoods International). Table 27 illustrates the age of visitors in ranges, showing that one-fourth (27%) of the survey sample was 45 years of age or younger, with a solid 45 percent between the ages of 46 and 65 years. A further one-fourth (28%) was 66 years or older. See Table 27.

Table 27. Age ranges of Verde Valley visitors

	Count	Percent (%)
20 and under	16	0.8%
21 - 25 years	71	3.7%
26 - 30 years	90	4.6%
31 - 35 years	126	6.5%
36 - 40 years	111	5.7%
41 - 45 years	114	5.9%
46 - 50 years	153	7.9%
51 - 55 years	188	9.7%
56 - 60 years	229	11.8%
61 - 65 years	303	15.6%
66 - 70 years	292	15.1%
71 - 75 years	161	8.3%
76 years and older	85	4.4%
Total	1,939	100.0%
Average age = 54.6 years **Median age = 58.0 years**		

Age is one of the most common predictors of differences in attitudes and behaviors. Age denotes two important characteristics about a person: their stage in the life cycle – e.g., young adult, middle-aged, parent, or retiree – and their membership in a cohort of individuals who were born at a similar time. Cohort analysis tracks a group of people over the course of their lives.

Generations are one way to group age cohorts. A generation typically refers to groups of people born over a 15-20 year span, such as the Baby Boomers or Millennial generation. The current five American generations, aged 18 years and over and their percent of the population, are the following:

- The Millennial Generation, adults aged between 18 and 34 years of age and comprising 30% of the population;
- Generation X, adults aged 35 to 50, comprising 27% of the population;
- The Baby Boom Generation, adults aged 51 to 69 years of age, comprising 30% of the population;
- The Silent Generation, adults aged 70 to 87 years of age, comprising 11% of the population; and
- The Greatest Generation, adults aged 88 to 100 years, comprising 2% of the population.

What can generational analysis tell us? Recent research shows a strong preference for personal car trips among those in Generation X, hence the plethora of new car advertising with adventurous themes and copy that appeals to Gen X'ers. Yesawich Research shows that the Baby Boom generation has a clear preference for "chain-affiliated" hotels and resorts, while preference for "independent" hotels and resorts is highest among Millennials. Overall, "Brand" loyalty (as revealed by willingness to stay with particular brands on future trips) is highest among Boomers and the Silent generation, and lowest among both Millennials and X'ers (respectively) (Source: Yesawich, MMGY Global).

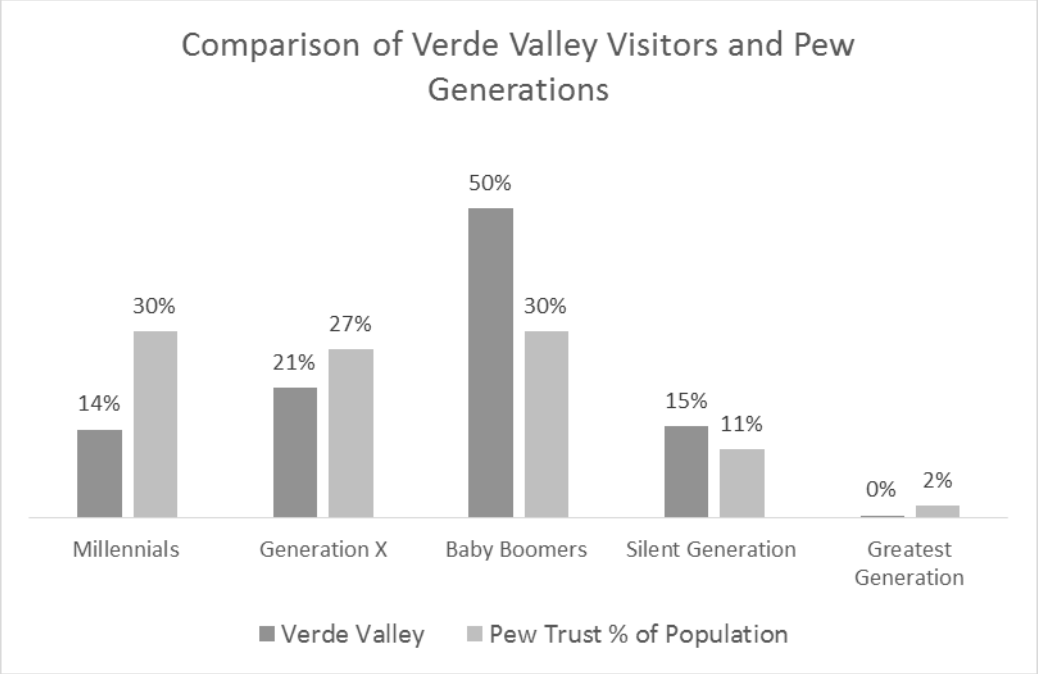
Table 28 compares the survey sample recoded to the generational age cohorts for Verde Valley visitors to the percentage of the population for each cohort. Currently the Verde Valley is attracting many more Baby Boomers and the Silent Generation and fewer Millennials and Generation X'ers. See Table 28.

Table 28. Comparison of Verde Valley visitor ages to Pew Trust Generational Research

	Count	Survey Percent (%)	Percent of U.S. Population18 years & over
Millennials (18 - 34 years)	276	14.2%	30%
Generation X (35 - 50 years)	405	20.9%	27%
Baby Boomers (51 - 69 years)	964	49.7%	30%
Silent Generation (70 - 87 years)	286	14.7%	11%
Greatest Generation (88 - 100 years)	8	0.4%	2%
Total	1939	100%	100%

Source: Pew Research Center, The Whys and Hows of Generations Research, Sept. 3, 2015

Figure 4: Comparison of Verde Valley Visitors and Generations



Gender of visitors

There was no specific question about gender in the survey, however, based on the counts of males and females in the sample it was determined that overall, there were slightly more females in the sample (53%) than males (47%). See Table 29.

Table 29. Gender of visitors to Verde Valley

	Count	Percent (%)
Female	2,484	53.4%
Male	2,168	46.6%
Total	4,652	100.0%

Did any significant differences exist in visitors' age by gender? No significant differences were found; on average, males (average 55 years) were just slightly older than females (average age 54 years). See Table 30.

Table 30. Average ages by gender of Verde Valley visitors

	Mean (age in years)
Female	54.7
Male	55.1

Household Income

Visitors to the Verde Valley had an average annual household income, derived from mid-points, of $109,276 which is significantly higher than the state average of $70,380 for domestic visitors (Source: Arizona Office of Tourism, *2014 Arizona Domestic Overnight Visitors,* Tourism Economics and Longwoods International). In fact, fully half of visitors (50%) had household incomes in excess of $100,000 – an income level that justify high-end resort properties and other luxury amenities. See Table 31 below.

Table 31. What category best describes your annual household income before taxes?

	Count	Percent (%)
Less than $40,000	158	7.4%
$40,000 - $59,999	262	12.2%
$60,000 - $79,999	324	15.1%
$80,000 - $99,999	333	15.5%
$100,000 - $119,999	292	13.6%
$120,000 - $139,999	183	8.5%
$140,000 - $159,999	166	7.7%
$160,000 - $179,999	99	4.6%
$180,000 - $199,999	73	3.4%
$200,000+	253	11.8%
Total	2143	100.0%
Average Household Income from mid-points $109,276		

Economic Impact of Tourism on Yavapai County

Introduction

In the survey of visitors to the Verde Valley, respondents were asked to detail their regional expenditures in each of the following categories: lodging, food and grocery, transportation (including gas), shopping/souvenir/art 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 Contribution 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, 2013). 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 and communities 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, 2013).

Indirect effects are a measure of economic activity in other industrial sectors that is spurred by the direct effects. For example, Verde Valley area 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, 2013).

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 area a population estimate was developed to use in expanding per-party expenditures to all potential visitors to the area. It is estimated that approximately 3,735,690 people visited the Verde Valley area in 2014-2015 (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, 9.1% of all visitors (313,316) were considered within region, i.e., Yavapai County and were removed from the population estimate. Therefore, only these 3,422,374 out-of-region visitors are included in the economic impact analysis.

Expenditure responses 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 to the Verde Valley area during the study period comprise both day visitors, those in the area for less than one day and those who are staying overnight, the mean length of stay in the Verde Valley area was 3.0 nights, which was used to expand the per-day expenditures estimated in the survey. From the

survey we know that day visitors comprise 33.8 percent of all Verde Valley visitors, this translates into 1,156,762 visitors, while overnight visitors account for 66.2 percent of the sample which translates to 2,265,611 visitors for a total of 3,422,374 visitors. Direct expenditures are estimated for both day visitors Table 32, and for overnight visitors Table 33. Expenditures for both overnight and day visitors are totaled and used as inputs to the I/O model, Table 34 used in the subsequent economic contribution analysis. The harmonic or trimmed mean of the frequency distribution is used in this estimate, this is a more conservative estimate of central tendency and is less affected by extreme values within the frequency distribution. The harmonic mean per-person per-day direct expenditure estimates are included in Table 32, below. Per-party per-day expenditures are divided by the median party size for day visitors (2 persons), then the population estimate is derived by multiplying the percentage of visitors with expenditures by the visitor population estimate. Finally the visitor population estimate is multiplied by per-person per-day expenditures for the direct expenditure.

Table 32. Estimate of regional expenditures by day visitors to the Verde Valley

Day Trip Expenditures	Per-party per-day harmonic mean expenditure	Per-person per-day harmonic mean expenditure	Percentage with expenditures	Population estimate	Total Direct Expenditure
Lodging/Camping	$0	$0	0	0	
Restaurant & grocery	$46	$23	65%	751,896	$17,358,000
Transportation (including gas)	$28	$14	54%	624,652	$8,883,000
Shopping/souvenirs	$36	$18	48%	555,246	$10,130,000
Recreation/Tour/Entrance/Permit fees	$41	$21	45%	520,543	$10,715,000
Spa/spiritual/metaphysical	$18	$9	3%	34,703	$314,000
Other	$58	$29	5%	57,838	$1,681,000
Total Direct					$49,081,000

Using the same methods outlined above, with two exceptions. First, per-party per-day expenditures are divided by the median party size for overnight visitors, 2 persons. Then per-person per-day median expenditures are multiplied by the average length of stay, 3 days in this case, so that all expenditures are captured. The population estimates and the percentage of the visitor population with expenditures is much higher than those found in the day visitor calculations. See Table 33.

Table 33. Estimate of regional expenditures by overnight visitors to the Verde Valley

Overnight visitors	Per-party per-day harmonic mean expenditure	Per-person per-day harmonic mean expenditures	Per-person per-trip harmonic mean expenditures	% with expenditures	Population estimate	Direct Expenditures
Lodging/Camping	$98	$49	$147	70%	1,585,928	$233,113,000
Restaurant & grocery	$64	$32	$95	84%	1,903,144	$180,810,000
Transportation (including gas)	$22	$11	$32	75%	1,699,209	$54,845,000
Shopping/souvenirs	$34	$17	$50	70%	1,585,928	$79,451,000
Recreation/Tour/Entrance/Permit fees	$25	$12	$37	60%	1,359,367	$50,481,000
Spa/spiritual/metaphysical	$37	$18	$55	15%	339,842	$18,707,000
Other	$19	$10	$29	5%	113,281	$3,274,000
Total Direct						$620,681,000

Finally total direct expenditures for day and overnight visitors are combined and used as inputs to the Implan model. See Table 34.

Table 34. Estimate of regional expenditures by all visitors to the Verde Valley

Total Expenditures	**Day Visitor**	**Overnight Visitor**	**Total**
Lodging/Camping	$0.00	$233,113,000	$233,113,000
Restaurant & grocery	$17,358,000	$180,810,000	$198,168,000
Transportation (incl gas)	$8,883,000	$54,845,000	$63,728,000
Shopping/souvenirs	$10,130,000	$79,451,000	$89,581,000
Recreation/Tour/Entrance/Permit fees	$10,715,000	$50,481,000	$61,196,000
Spa/spiritual/metaphysical	$314,000	$18,707,000	$19,021,000
Other	$1,681,000	$3,274,000	$4,955,000
Total	$49,081,000	$620,681,000	$669,762,000

Regional Economic Impact Analysis Results

The total number of out-of-region visitors to the Verde Valley area in the study period was 3,422,374 visitor parties. These visitors were responsible for some $669 million of expenditures in Yavapai County, AZ, with an average regional expenditure of $196 per person, arrived at by dividing the $669 million in direct expenditures by 3.4 million visitors. Expenditures recorded for each industrial category were entered into IMPLAN's impact analysis.

Table 35 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. Please note that total direct expenditures are reduced by $125 million, this is the *result of direct leakage* for goods and services purchased from outside the county and region, therefore, direct output in the model differs from direct expenditures in Table 34. 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, 2012).

Table 35. Impact and multipliers of $669 million of regional expenditures by Verde Valley area visitors

Economic Impact	Direct Effects	Indirect Effects	Induced Effects	Type SAM Multipliers	Total
Total Output	$543,944,000	$67,901,000	$85,449,000	1.28	$697,294,000
Total Employment	6,983	676	758	1.21	8,417
Total Labor Income	$188,188,000	$24,376,000	$28,196,000	1.28	$240,760,000
State and Local Taxes	$45,667,000	$2,501,000	$5,592,000		$53,760,000
Federal Taxes	$39,575,000	$4,576,000	$6,081,000		$50,232,000

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 35, visitors to the Verde Valley area spurred an additional $53.7 million of tax revenue for Yavapai County and the state.

The majority of tax revenue coming from the Verde Valley area 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 2015 visitors to the Verde valley area injected significant output to regional businesses in the Verde Valley area and Yavapai County. Approximately $544 million of regional purchases were made by out-of-region visitors after leakage, contributing to a total economic contribution of $697.34 million for Yavapai County. This economic activity supported some 8,417 full-time equivalent (FTE) jobs. The regional economic impact of visitors to Verde valley is substantial, and significantly contributes to the greater regional economy.

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 ○ February ○ March ○ April ○ May ○ June ○ July ○ August ○ September ○ October ○ November ○ December

1. Mark all Verde Valley communities you plan to visit on this trip.

○ Camp Verde ○ Clarkdale ○ Cottonwood ○ Jerome ○ Sedona

2. Is the Verde Valley the primary destination of your trip?

○ Yes ○ No If not, what location is your primary destination?

○ Flagstaff ○ Phoenix ○ Other (specify): _____
○ Grand Canyon ○ Las Vegas
○ Prescott

3. Is this your first trip to the Verde Valley?

○ Yes ○ No If not, how many times have you visited? ☐☐

4. Is this trip to the Verde Valley .....?

○ A day trip only ○ An overnight trip for ☐☐ nights (fill in # nights).

What type of lodging are you using?

○ Hotel/Motel/Resort ○ Campground/RV Park ○ Other (define): _____
○ Bed & Breakfast ○ Second Home
○ Timeshare Property ○ Home of Friends/Family

5. What most influenced your decision to visit the Verde Valley? Please mark only ONE.

○ Magazine/newspaper article ○ Internet ○ Travel agent/tour operator
○ Magazine/TV ad ○ Friend or relative ○ Other

6. What single resource was the most important in planning/researching your trip to the Verde Valley? (what to do, where to stay, where to eat) Please mark only ONE.

○ Travel brochure ○ Internet ○ Travel agent/tour operator
○ Guidebook ○ Friends or relatives ○ Other

7. Indicate the primary purpose of your current visit to the Verde Valley. Please mark only ONE.

○ Visiting friends and relatives ○ Business ○ Outdoor recreation (hiking, golf, kayaking, biking, etc.)
○ Spiritual/metaphysical/wellness ○ Shopping ○ Special event (festival, exhibition, concert, etc.)
○ Cultural/historical ○ Sightseeing ○ Other
○ Birding ○ Casino gaming
○ Archeology ○ Wine tasting

8. Please estimate as closely as possible the amount of money 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) ☐☐92

Please tell us the number of people these expenses cover. ☐☐

Lodging/camping	$ ☐☐☐☐	Recreation/Tour/ Entrance /Permit fees	$ ☐☐☐☐
Restaurant & grocery	$ ☐☐☐☐	Spa/spiritual/metaphysical	$ ☐☐☐☐
Transportation (incl gas)	$ ☐☐☐☐	Other	$ ☐☐☐☐
Shopping/souvenirs/art	$ ☐☐☐☐	Define Other:	_____

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9. Tell us which of the following attractions/activities you have or will visit/participate in during this visit to the Verde Valley. (Please mark all that apply) 9944091747

General Verde Valley Activities-Any location:

- ○ Area Rivers or Creeks
- ○ Art Galleries/Museums
- ○ Jeep/Off-Highway Vehicle Tours
- ○ Birdwatching and Observing Wildlife
- ○ Camping/Recreational Vehicle Stay
- ○ Dining
- ○ Golfing
- ○ Hiking
- ○ Mountain or Road Biking
- ○ Rock Climbing
- ○ Shopping
- ○ Spa
- ○ Wineries/Tasting rooms
- ○ Events/Festivals (define): _____

Camp Verde Attractions:

- ○ Cliff Castle Casino
- ○ Downtown Camp Verde
- ○ Fort Verde State Park
- ○ Montezuma Castle/Well National Monument
- ○ Out of Africa
- ○ Verde Valley Archeology Center

Clarkdale Attractions:

- ○ Clarkdale Arts & Entertainment District
- ○ Copper Art Museum
- ○ Tuzigoot National Monument
- ○ Verde Canyon Railroad
- ○ Verde River Access Point

Cottonwood Attractions:

- ○ Blazin' M Ranch
- ○ Dead Horse Ranch State Park
- ○ Historic Old Town Cottonwood
- ○ Jail Trail
- ○ Old Town Center for the Arts

Jerome Attractions:

- ○ Galleries/Shops
- ○ Historic Jerome/Ghost Towns
- ○ Jerome State Historic Park
- ○ Music/Special Events
- ○ Wineries/Tasting Rooms

Sedona Attractions:

- ○ Chapel of the Holy Cross
- ○ Red Rock Scenic Byways
- ○ Oak Creek Canyon
- ○ Palatki and/or Hononki Heritage Sites
- ○ Red Rock Crossing
- ○ Resort
- ○ Sedona Airport Scenic Overlook
- ○ Sedona Heritage Museum
- ○ Slide Rock and/or Red Rock State Park
- ○ Tlaquepaque/Hillside
- ○ Uptown Sedona
- ○ Vortex Sites

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10. On a scale of 1 to 5 where one is Low and five is High, please indicate your overall satisfaction with your experience in the Verde Valley in each of the following categories:

	Low 1	2	3	4	5 High
Attractions	○	○	○	○	○
Activities	○	○	○	○	○
Accommodations	○	○	○	○	○
Entertainment	○	○	○	○	○

	Low 1	2	3	4	5 High
Shopping	○	○	○	○	○
Food and Drink	○	○	○	○	○
Prices	○	○	○	○	○
Visitor Information	○	○	○	○	○

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11. 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: _____

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

Number of: Women ☐☐ Men ☐☐ Children under 18 ☐☐ **In what year were you born?** 19☐☐

13. Who is traveling with you on this trip? Please mark only ONE.

- ○ Family and Friends
- ○ Family Only
- ○ Friends Only
- ○ Nobody, traveling alone
- ○ Organized Group
- ○ Business Associates

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

- ○ Less than $40,000
- ○ $40,000 to $59,999
- ○ $60,000 to $79,999
- ○ $80,000 to $99,999
- ○ $100,000 to $119,999
- ○ $120,000 to $139,999
- ○ $140,000 to $159,999
- ○ $160,000 to $179,999
- ○ $180,000 to $199,999
- ○ $200,000 or higher

Thank You & Enjoy Your Visit!

Location Code: ☐

Appendix B: What is your primary destination-other?

	Count
SCOTTSDALE	13
TUCSON	8
MESA	7
WILLIAMS	5
PAYSON	4
DEWEY	3
PAGE	3
CASA GRANDE	2
FLAGSTAFF/GRAND CANYON	2
LAKE HAVASU	2
MUNDS PARK	2
OUT OF AFRICA	2
ROADTRIP CROSS COUNTRY	2
SOUTHWEST	2
TEMPE	2
TRAVELING	2
TUCSON, SEDONA	2
YUMA	2
1 WEEK IN TUCSON AND 1 WEEK HERE & WILLIAMS	1
2 NIGHTS EACH LOCATION	1
5.5 WK VACATION	1
AHWATUKEE	1
ALL OF THE U.S. ENDS HAWAII	1
ALSO CAME TO PRESCOTT	1
ANTHEM	1
APACHE JUNCTION	1
APACHE JUNCTION AZ	1
ARIZONA	1
ARIZONA & NEW MEXICO	1
AUSTIN, SANTA FE, WHITE SANDS MONUMENTS, HERITAGE	1
BLAZIN M RANCH	1
BOTH SEDONA, PHOENIX EQUALLY	1
CALIFORNIA	1
CALIFORNIA CENTRAL COAST	1
CANYON DE CHELLY	1
CAVE CREEK	1
CHACO, NM	1
CHINO VALLEY	1
CORNVILLE	1
COTTONWOOD/CLARKDALE	1

	Count
CROSS COUNTRY TRIP	1
DRIVING AROUND-NO SET DESTINATION	1
DRIVING THROUGH	1
FIVE WEEKS IN ARIZONA. STAY ONE WEEK AT EACH SPOT. DEADHORSE SP	1
FLAGSTAFF	1
FLAGSTAFF AND GRAND CANYON	1
FLAGSTAFF/GRAND CANYON/PRESCOTT/PHOENIX	1
FLAGSTAFF/PRESCOTT	1
FLORENCE-JAN RENTAL	1
GC, PAGE, SEDONA (ALL THREE)	1
GLENDALE/SEDONA	1
GRAND CANYON, PRESCOTT	1
GRAND CANYON/MONUMENT VALLEY	1
GRAND JUNCTION CO, ALL OF NORTHERN ARIZONA	1
GREEN VALLEY	1
HAWKS GAME!!	1
HEBER/OVERGAARD	1
HIRE CAR WITH FAMILY MANY LOCATIONS	1
IOWA	1
JEROME, SEDONA	1
JUST TO SEE ARIZONA	1
KANAB, ZION	1
KIRKLAND, WA	1
LA., SAN FRAN, SAN DIEGO, GRAND CANYON, LAS VEGAS	1
LAKE MONTEZUMA	1
LIVE IN FLAGSTAFF	1
LIVE IN RV-SEEING AMERICA	1
LOLO MAI SPRINGS	1
LOS ANGELES, CA	1
MANY DESTINATIONS	1
MARICOPA	1
MAYER	1
MESA, SEDONA	1
MOAB & OTHER NATIONAL PARKS & SAN DIEGO	1
MOAB & PAGE	1
MOAB,ZION	1
MONUMENT VALLEY, MOAB, MESA VERDE	1
MONUMENT VALLEY, UT	1
MYRTLE BEACH, SC	1
NEW RIVER	1
NEW YORK, NY	1

	Count
NO PRIMARY, ROUND TRIP THROUGH HERE, S. UTAH, S. CALIF.	1
NONE WE ARE ROAMING ON VACATION	1
NORTHERN AZ- PAGE,CHINLE, GRAND CANYON, FLAGSTAFF, LAS VEGAS	1
ON THE ROAD IN VW CAMPER	1
PAGE, MOAB, MONUMNET VALLEY, MESA VERDE	1
PALM SPRINGS, CA	1
PARK CITY, UT	1
PART-TIME RESIDENT	1
PASO ROBLES, SOLVANG, CA	1
PASSING THROUGH	1
PASSING THROUGH BUT MAY STAY IN THE WINTER	1
PEORIA	1
PHOENIX/GRAND CANYON	1
PHOENIX/LAS VEGAS, NV	1
PHOENIX/MONUMENT VALLEY/ZION NAT'L PARK	1
PHOENIX/SURPRISE	1
PHX TO YUMA TO COTTONWOOD TO FLAGSTAFF TO PAGE ETC.	1
POLLOCK, LA	1
PRESCOTT	1
PRESCOTT 3 DAYS/COTTONWOOD 2 DAYS	1
PUEBLO, CO	1
RANCHING/BOARDING	1
RED ROCK	1
ROAD TRIP	1
ROAD TRIP ALL OVER	1
ROAD TRIP MANY DESTINATIONS	1
ROAD TRIP THRU CO/AZ	1
ROADTRIP (TUC>>LAS VEGAS)	1
RV & STOPS @ SEVERAL LOCATIONS	1
S UTAH/SW CO.	1
S.W. USA STATES	1
SAN FRANCISCO, CA	1
SAN TAN VALLEY	1
SANTA FE, NM	1
SANTA FE, PAGE, SEDONA	1
SEATTLE	1
SEDONA MOUNTAINS	1
SEDONA ONE WEEK;DAY TRIP TO 'SLOT CANYON' AND 'HORSESHOE	1
SEDONA, LAKE HAVASU	1
SEDONA/FLAGSTAFF	1
SEDONA/GRAND CANYON	1

	Count
SEDONA/GRAND CANYON	1
SIERRA VISTA	1
SOUTHERN UTAH, SOUTHERN CALIFORNIA	1
SOUTHWEST CANYON TOUR	1
SOUTHWEST TRIP	1
ST. DAVID	1
STARTING IN DALLAS LOOP THRU N TEXAS, NM & AZ, THEN SOUTH BACK	1
SUN CITY	1
SUN CITY WEST	1
TEXAS	1
TOMBSTONE	1
TOMBSTONE-TUCSON	1
TOMBSTONE/FLAGSTAFF	1
TOUR FROM L.A.	1
TOURING GRAND CANYON-MONUMENT VALLEY-POSSIBLY ZION/BRYCE	1
TRAINING GRAND CANYON	1
TRAVEL AROUND TUCSON	1
TRAVELING FOR 2 MONTHS GOVERNED BY WEATHER	1
TRAVELLING THROUGHOUT S. CAL & AZ	1
TUCSON U OF A	1
VERDE RIVER CANYON TRAIN	1
VISIT PHOENIX, SCOTTSDALE & VALLEY TO SEE PEOPLE & SIGHTS	1
WAS JUST ON THE WAY FROM LAS VEGAS TO PHOENIX	1
WE ARE DRIVING AROUND	1
WE'RE JUST FOOTLOOSE & HAVE NO GIVEN DESTINATION-PLAN TO STAY	1
WILLIAMS/ASHFORK	1
WINSLOW	1
WISCONSIN	1
ZION NATIONAL PARK	1
Total	198

Appendix C: Other Lodging

	Count
VRBO	13
RENTAL HOME	9
AIR BNB	5
CONDO	3
CONDO RENTAL	3
HOME RENTAL	3
RENTAL CONDO	3
RENTAL	2
RENTING CONDO	2
VACATION RENTAL	2
BEAVER CREEK/CAMP VERDE	1
BLM	1
BOARDING HOUSE	1
BUT WANTED A B&B BUT THEY WERE FULL	1
CABIN	1
CAMPING	1
CASITA RENTAL	1
DAY TRIP FROM PHOENIX	1
ELKS LODGE	1
EXTENDED STAY	1
HOME AWAY	1
HOUSE RENTAL	1
HOUSE RENTAL SEDONA	1
HYATT	1
INN	1
IRON HORSE UNIQUE EXPERIENCE LIKE NONE OF THE	1
LIVE IN PRESCOTT	1
LOVE THE COZY CACTUS	1
NEW RESIDENT	1
OWN HOME	1
PRIVATE HIRE	1
PRIVATE HOME RENTAL	1
PROPERTY RENTAL	1
RCI	1
RCI-CHANGE	1
RENT	1
RENT CONDO	1
RENTAL TOWNHOME	1
RENTED ACCOMODATION	1
RV	1

	Count
SEDONA	1
SEDONA HILTON	1
SPEND WINTER (SECOND HOME)	1
STAYING IN ARCOSANTI	1
TOWNHOUSE RENTAL	1
VACATION HOME RENTAL	1
VACATION RENTAL HOUSE	1
Total	82

Appendix D: Other Expenses

	Count
MISCELLANEOUS	6
GIFTS	2
TIME SHARE	2
TIPS	2
SEMINAR $140	1
$3,000 SHOPPING NOTHING ELSE	1
$300 NO DEFINITION	1
2000 NO EXPLANATION $2,000	1
AIRFARE/RENTAL CAR $2,000	1
ATTRACTIONS $50	1
BEER $25	1
BIKE RENTAL	1
BIKE RENTAL $100	1
BLAZIN M $75	1
BOOZE $50	1
BREAKFAST EARLIER $30	1
CASINO	1
CHURCH	1
CONCERT TICKETS	1
CONVENTION FEES FOOD & VENUE	1
CROSSING WORLDS JOURNEY $600	1
DENTIST VISIT $655	1
DRINKING $50	1
EMERGENCY FUND $1,500	1
ENTERTAINMENT	1
EXTERIOR PAINTING $9000	1
EXTRA EXPENSES	1
FLY FISHING $12	1
FOOD $100	1
FOOD $20	1
GIFT SHOP	1
GOLF $10	1
GOLF $20	1
GOLF $200	1
GOLF $25	1
GOLF $30	1
GROCERIES $100	1
HELICOPTER TOUR $700	1
HOUSE HUNTING 50,000	1
HOUSE MAINTENANCE $2,000	1

	Count
INCIDENTALS	1
INTERNET	1
JEEP TOUR $300	1
KIDS COATS & GLOVES & HATS $75	1
LIQUIOR $100	1
LOCAL WINERY $50	1
LODGING TME SHARE	1
MISC (TIPS)	1
MISC THINGS	1
MISC-MEDICINE	1
MISCELLANEOUS/HEALTH	1
MISCELLANEOUS/TIPS	1
ODDS & ENDS	1
OTHER	1
OUT OF AFRICA $130	1
PARK & MUSEUM ENTRANCE FEES $25	1
PASSES TO NATIONAL PARKS $5	1
RAIL ROAD $174	1
RAILROAD $320	1
REFRESHMENTS $15	1
RESTAURANTS $200	1
REUNION $3,000	1
RR TICKETS	1
SENIOR PASS	1
SHOW	1
SKYDIVING $450	1
SNACKS, TIPS	1
SNACKS/MISC	1
SOUVENIRS $5	1
SOUVENIRS $50	1
SPA $400	1
TASTING FEES $50	1
THERAPY $300	1
TIMESHARE $200	1
TOTAL $150 (ALL SPENDING)	1
TOUR $100	1
TRAIN TRIP $240	1
UNDECIDED	1
VERDE RAIL TOUR $180	1
VERDE VALLEY TRAIN $400	1
VISITOR FEES $100	1

	Count
WINE $1,000	1
WINE $200	1
WINE $35	1
WINE $50	1
WINE BAR $20	1
WINE TASTING $60	1
WINE TASTING EXPENSES $200	1
WINE/BOTTLES $200	1
WINE/FOOD $400	1
WINERIES $40	1
Total	99

Appendix E: Festivals/Events attended in the Verde Valley

	Count
ZOO	5
BLAZIN' M RANCH	4
CONCERT	4
HELICOPTER TOUR	4
FILM FESTIVAL	3
OUT OF AFRICA	3
CALIFORNIA GUITAR TRIO	2
CONVENTION	2
CORN FESTIVAL	2
GRAND CANYON	2
HORSE RIDING	2
MUSIC	2
TRAIN	2
VERDE CANYON RAILROAD	2
WEDDING	2
4 WHEELING AROUND MOUNTAINS & EXPLORING	1
AERIAL TOURS	1
ANTIQUES	1
ART	1
ART & CRAFTS	1
ART SHOW	1
ART WALKS	1
ART, ST. PATRICKS	1
BALLET	1
BEER TASTING	1
BLAZIN M RANCH GEOLOGY PRESENTATION/INDIAN PRESENTATION/CITY	1
BOB DYLAN	1
BOB DYLAN 74TH BIRTHDAY BASH IN COTTONWOOD	1
BOB DYLAN B'DAY BASH	1
BREWERY	1
BUFFALO SOLDIERS	1
CALIFORNIA GUITAR TRIO CONCERT. WE CAME FROM WASHINGTON DC	1
CAMP VERDE CORNFEST	1
CAMPFIRE COOKOUT	1
CINCO DE MAYO FESTIVAL	1
CINCO DE MAYO, ART	1
CONCERTS	1
CONFERENCE	1
COTTONWOOD	1
COWBOY WEEKEND	1

	Count
“DERBY DAYS" MAY 3	1
DON'T KNOW YET	1
DYLAN BIRTHDAY BASH	1
FESTIVAL OF LIGHTS	1
FISHING	1
FLY FISHING	1
GEM & MINERAL SHOW/ARTS & CRAFTS FAIR	1
HELICOPTER TOUR OF VERDE VALLEY & MTS!	1
HELICOPTER TOUR/TRAIN TOUR	1
HORSE BACK	1
HOT AIR BALLOON	1
HUMMINGBIRD	1
IF THERE ARE EVENTS OR FESTIVALS, I WILL GO.	1
INDIAN MARKET SANTA FE	1
JEEPING	1
LECTURES	1
LOOK AT THE GRAND CANYON	1
MARU IN SHORT	1
MARY FISHER THEATER	1
MEDITATION TEACHER TRAINING	1
NASCAR	1
OCTOBER FEST, MUSIC FEST, CRAFT FEST.	1
OCTOBERFEST	1
OLD TOWN CENTER FOR ARTS CONCERT IN COTTONWOOD	1
PECAN & WINE	1
PECAN & WINE FEST	1
PECAN AND WINE FEST	1
PHOTOGRAPHY!	1
PINK JEEP TOUR	1
PLEIN AIR	1
RAILROAD	1
RED ROCK SKYDIVING	1
RELAXING!	1
RESTAURANTS	1
REUNION-RAILROAD TRIP/JEEP TOURS/BALLOON RIDE	1
RIFLE RANGE	1
RODEO PRESCOTT	1
SEDONA FILM FESTIVAL	1
SEDONA INTERNATIONAL FESTIVAL	1
SEGWAY SEDONA	1
SEDONA FILM FESTIVAL	1

	Count
SIGHT SEEING	1
SIGHTSEEING	1
SPIRIT ROOM-MUSIC (3 BANDS IN 2 DAYS)	1
TILTED EARTH	1
TRAIN RIDE	1
TRAIN, TOUR	1
TROLLEY	1
TRYING TO DO IT ALL!	1
VISIT FRIEND	1
WATER TO WINE	1
WEDDING;HUMMINGBIRD FESTIVAL	1
WHAT EVER WE COME UPON	1
WHATEVER IS ON	1
YAVAPAI COLLEGE	1
YOGA RETREAT	1
Total	122

Appendix F: Origin of Arizona Visitors to the Verde Valley

	Count	Percent (%)
PHOENIX	102	17.6%
SCOTTSDALE	47	8.1%
MESA	40	6.9%
GLENDALE	32	5.5%
PEORIA	28	4.8%
GILBERT	24	4.2%
PRESCOTT	24	4.2%
CHANDLER	20	3.5%
TUCSON	19	3.3%
PRESCOTT VALLEY	18	3.1%
ANTHEM - DESERT HILLS	14	2.4%
ORO VALLEY	13	2.2%
SUN CITY	13	2.2%
TEMPE	13	2.2%
FLAGSTAFF	11	1.9%
DEWEY	9	1.6%
GROOM CREEK	9	1.6%
SURPRISE	9	1.6%
BUCKEYE	8	1.4%
GREEN VALLEY	7	1.2%
QUEEN CREEK	7	1.2%
GOODYEAR	6	1.0%
GUADALUPE	5	0.9%
NEW RIVER	5	0.9%
AVONDALE	4	0.7%
CAVE CREEK	4	0.7%
CHINO VALLEY	4	0.7%
LAKE HAVASU CITY	4	0.7%
PAYSON	4	0.7%
SADDLEBROOKE	4	0.7%
YUMA	4	0.7%
GILA BEND	3	0.5%
LITCHFIELD PARK	3	0.5%
MARICOPA	3	0.5%
SUN	3	0.5%
WILLIAMS	3	0.5%
BELLEMONT	2	0.3%
BENSON	2	0.3%
CORONA DE TUCSON - VAIL	2	0.3%

	Count	Percent (%)
COTTONWOOD	2	0.3%
EL MIRAGE	2	0.3%
GOODYEAR	2	0.3%
HEREFORD	2	0.3%
KINGMAN	2	0.3%
LAVEEN	2	0.3%
MISSION	2	0.3%
NOGALES	2	0.3%
RINCON	2	0.3%
SUN LAKES	2	0.3%
AJO - WHY	1	0.2%
BAPCHULE	1	0.2%
BLACK CANYON CITY - ROCK SPRINGS	1	0.2%
BOUSE	1	0.2%
BULLHEAD CITY	1	0.2%
CASA GRANDE	1	0.2%
CHINLE	1	0.2%
CLARKDALE	1	0.2%
CORNVILLE	1	0.2%
ELEVEN MILE CORNER	1	0.2%
GRAND CANYON	1	0.2%
HAPPY JACK	1	0.2%
HUACHUCA CITY	1	0.2%
KINO	1	0.2%
LAKE MONTEZUMA	1	0.2%
PAUL SPUR	1	0.2%
PAULDEN	1	0.2%
SAFFORD	1	0.2%
SAHUARITA	1	0.2%
SEDONA	1	0.2%
SIERRA VISTA	1	0.2%
SOUTH TUCSON	1	0.2%
TOLLESON	1	0.2%
WHITE HILLS	1	0.2%
WICKENBURG	1	0.2%
WITTMANN	1	0.2%
Total	578	100.0%

Appendix G: Comparisons by Verde Valley Community

Verde Valley Tourism Survey 2014-2015

Community where you received the visitor survey

	Mark all the Verde Valley communities you plan to visit?					
	Camp Verde	Clarkdale	Cottonwood	Jerome	Sedona	Overall
Count	638	497	1,060	1,243	1,622	2,109
Percent %	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Verde Valley Tourism Survey 2014-2015

Community where you received the visitor survey by month

	Verde Valley community where the survey was collected					
	Camp Verde	Cottonwood	Clarkdale	Jerome	Sedona	Total
July	29	22	11	40	86	188
August	27	22	9	39	74	171
September	1	9	0	0	70	80
October	15	45	1	0	60	121
November	16	13	27	40	37	133
December	29	38	4	85	38	194
January	24	21	13	44	33	135
February	31	34	26	18	46	155
March	28	50	20	60	57	215
April	41	34	8	47	57	187
May	21	43	16	42	64	186
June	20	17	21	28	71	157
Total	282	348	156	443	693	1922

Verde Valley Tourism Survey 2014-2015

Survey location by community

	Verde Valley community where the survey was collected					
	Camp Verde	Clarkdale	Cottonwood	Sedona	Jerome	Total
	Percent (%)	Percent (%)	Percent (%)	Percent (%)	Percent (%)	Percent (%)
Camp Verde Visitor Center	10.1%					1.4%
Verde Valley Archeology Center	4.6%					.7%
Fort Verde SP	1.3%					.2%
Out of Africa	84.0%					12.0%
Copper Art Museum		4.2%				.4%
Verde River Recreation					.2%	.0%
Verde Canyon Railway		95.8%				9.5%
Cottonwood Visitor Center			19.8%			4.1%
Blazin M			28.2%			5.8%
Arizona Stronghold Tasting Room			1.8%			.4%
Iron Horse Inn			13.4%			2.8%
Cottonwood Inn			1.8%			.4%
Old Town intercepts			4.8%			1.0%
Page Springs Cellars			11.1%			2.3%
Alcantara Vineyard & Winery			7.0%			1.4%
Old Town Center for the Arts			12.0%			2.5%
Sedona Visitor Center/chamber				53.5%		18.2%
Sedona Rouge				7.9%		2.7%
Barlow Jeep Rentals				6.3%		2.1%
Hyatt				4.4%		1.5%
Pink Jeep/Sedona Jeep				24.5%		8.3%
McLean Meditation Center				3.4%		1.2%
Unknown					2.6%	.6%
Jerome Intercepts					97.1%	20.5%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Verde Valley Tourism Survey 2014-2015

Community where you received the visitor survey

	Mark all the Verde Valley communities you plan to visit?					
	Camp Verde	Clarkdale	Cottonwood	Jerome	Sedona	Overall
Count	638	497	1060	1243	1622	2109
Percent %	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Verde Valley Tourism Survey 2014-2015

Verde Valley communities that you will visit on this trip

	Verde Valley community where the survey was collected					
	Camp Verde	Clarkdale	Cottonwood	Sedona	Jerome	Overall
	Percent (%)	Percent (%)	Percent (%)	Percent (%)	Percent (%)	Percent (%)
Camp Verde	78.4%	27.5%	26.9%	24.4%	14.0%	30.3%
Clarkdale	9.9%	71.6%	31.7%	15.5%	15.8%	23.6%
Cottonwood	28.3%	60.3%	86.6%	40.6%	40.5%	50.3%
Jerome	29.0%	59.3%	56.5%	49.5%	95.5%	58.9%
Sedona	44.9%	81.4%	74.8%	98.4%	61.7%	76.9%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Verde Valley Tourism Survey 2014-2015

Is the Verde Valley your primary destination on this trip?

	Verde Valley community where the survey was collected					
	Camp Verde	Clarkdale	Cottonwood	Sedona	Jerome	Total
	Percent (%)	Percent (%)	Percent (%)	Percent (%)	Percent (%)	Percent (%)
Yes	73.6%	68.8%	68.0%	77.7%	66.2%	71.8%
No	26.4%	31.2%	32.0%	22.3%	33.8%	28.2%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Verde Valley Tourism Survey 2014-2015

If the Verde Valley is not your primary destination on this trip, what is your primary destination?

	Verde Valley community where the survey was collected					
	Camp Verde	Clarkdale	Cottonwood	Sedona	Jerome	Total
	Percent (%)	Percent (%)	Percent (%)	Percent (%)	Percent (%)	Percent (%)
Flagstaff	14.4%	2.8%	4.3%	7.6%	5.8%	6.9%
Grand Canyon	23.3%	18.1%	20.1%	45.9%	15.6%	26.2%
Prescott	2.2%	5.6%	2.2%	2.9%	3.2%	3.0%
Phoenix	24.4%	33.3%	20.1%	15.3%	24.7%	22.1%
Las Vegas	7.8%	6.9%	5.0%	2.9%	17.5%	8.2%
Other	27.8%	33.3%	48.2%	25.3%	33.1%	33.6%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Verde Valley Tourism Survey 2014-2015

Is this your first trip to the Verde Valley?

	Verde Valley community where the survey was collected					
	Camp Verde	Clarkdale	Cottonwood	Sedona	Jerome	Total
	Percent (%)	Percent (%)	Percent (%)	Percent (%)	Percent (%)	Percent (%)
Yes	50.0%	64.5%	47.6%	50.7%	33.4%	47.7%
No	50.0%	35.5%	52.4%	49.3%	66.6%	52.3%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Verde Valley Tourism Survey 2014-2015

If this is not your first visit, how many times have you visited?

	Verde Valley community where the survey was collected					
	Camp Verde	Clarkdale	Cottonwood	Sedona	Jerome	Total
	Mean	Mean	Mean	Mean	Mean	Mean
If not how many times have you visited?	8	7	8	6	10	8

Verde Valley Tourism Survey 2014-2015

Is this trip to the Verde Valley…?

	Verde Valley community where the survey was collected					
	Camp Verde	Clarkdale	Cottonwood	Sedona	Jerome	Total
	Percent (%)	Percent (%)	Percent (%)	Percent (%)	Percent (%)	Percent (%)
A day trip only	69.6%	45.3%	28.6%	11.3%	49.0%	34.4%
An overnight trip	30.4%	54.7%	71.4%	88.7%	51.0%	65.6%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Verde Valley Tourism Survey 2014-2015

If staying overnight, how long did you stay?

	Verde Valley community where the survey was collected					
	Camp Verde	Clarkdale	Cottonwood	Sedona	Jerome	Total
	Mean	Mean	Mean	Mean	Mean	Mean
A day trip only	.	.	.	.	.	.
An overnight trip… # of nights on overnight trip?	3.3	4.9	4.4	6.0	4.1	4.5

Verde Valley Tourism Survey 2014-2015

If staying overnight, what type of overnight lodging did you use?

	Verde Valley community where the survey was collected					
	Camp Verde	Clarkdale	Cottonwood	Sedona	Jerome	Total
	Percent (%)	Percent (%)	Percent (%)	Percent (%)	Percent (%)	Percent (%)
Hotel-Motel-Resort	55.3%	45.2%	48.7%	42.6%	41.3%	45.0%
Bed & Breakfast	1.4%	4.2%	4.8%	3.4%	10.4%	4.9%
Timeshare Property	10.6%	39.3%	22.4%	41.0%	19.5%	30.4%
Campground-RV Park	19.9%	4.8%	11.8%	4.9%	10.7%	8.7%
Second home	1.4%	2.4%	2.5%	2.6%	2.0%	2.3%
Home of Friends or Family	14.9%	7.1%	9.0%	3.0%	16.1%	8.1%
Other	2.1%	1.8%	3.9%	5.4%	5.4%	4.5%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Verde Valley Tourism Survey 2014-2015

What most influenced you to visit the Verde Valley?

	Verde Valley community where the survey was collected					
	Camp Verde	Clarkdale	Cottonwood	Sedona	Jerome	Total
	Percent (%)	Percent (%)	Percent (%)	Percent (%)	Percent (%)	Percent (%)
Friend or relative	33.1%	32.1%	43.2%	45.9%	49.1%	42.8%
Other	32.8%	32.5%	33.7%	37.8%	37.3%	35.6%
Internet	24.0%	13.4%	16.5%	11.4%	8.3%	13.8%
Travel agent/tour operator	1.4%	14.4%	2.6%	2.4%	1.9%	3.4%
Magazine/newspaper article	6.1%	5.7%	3.3%	2.0%	2.5%	3.4%
Magazine/TV ad	2.7%	1.9%	.7%	.4%	.9%	1.1%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Verde Valley Tourism Survey 2014-2015

Most Important Resource used to plan trip?

	Verde Valley community where the survey was collected					
	Camp Verde	Clarkdale	Cottonwood	Sedona	Jerome	Total
	Percent (%)	Percent (%)	Percent (%)	Percent (%)	Percent (%)	Percent (%)
Internet	53.4%	43.3%	45.0%	52.4%	40.0%	47.5%
Friends or relatives	24.8%	19.4%	26.5%	20.5%	31.7%	24.6%
Other	12.9%	15.9%	17.0%	14.5%	21.0%	16.3%
Travel brochure	3.7%	10.0%	4.6%	4.2%	2.2%	4.4%
Guidebook	3.4%	1.0%	5.1%	6.4%	2.4%	4.3%
Travel agent/tour operator	1.7%	10.4%	1.7%	2.1%	2.7%	2.9%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Verde Valley Tourism Survey 2014-2015

Indicate the primary purpose of your current visit to the Verde Valley?

	Verde Valley community where the survey was collected					
	Camp Verde	Clarkdale	Cottonwood	Sedona	Jerome	Total
	Percent (%)	Percent (%)	Percent (%)	Percent (%)	Percent (%)	Percent (%)
Sightseeing	30.7%	54.0%	38.2%	45.1%	46.7%	42.8%
Outdoor recreation (hiking, golf, kayaking, biking etc)	20.4%	9.5%	15.7%	31.9%	10.2%	19.9%
Other	25.2%	16.5%	10.5%	6.2%	6.9%	11.2%
Visiting friends and relatives	11.9%	11.5%	13.9%	3.7%	12.9%	9.8%
Cultural/Historical	4.1%	2.5%	2.9%	3.0%	4.4%	3.4%
Special event (festival, exhibition, concert etc)	5.2%	2.5%	5.2%	2.5%	1.4%	3.3%
Wine tasting	.4%		9.9%	.5%	2.7%	2.9%
Shopping			.8%	.8%	9.9%	2.4%
Spiritual/Metaphysical/Wellness		1.5%	.8%	4.7%	2.2%	2.3%
Business	1.1%	1.5%	1.3%	1.0%	1.9%	1.3%
Archeology	.4%		.8%	.3%		.3%
Birding	.4%	.5%		.3%	.5%	.3%
Casino gaming	.4%				.3%	.1%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Verde Valley Tourism Survey 2014-2015

Please estimate your expenditures per-day in the Verde Valley

	Verde Valley community where the survey was collected					
	Camp Verde	Clarkdale	Cottonwood	Sedona	Jerome	Overall
	Mean	Mean	Mean	Mean	Mean	Mean
Please tell us the number of people these expenses cover?	4	3	3	3	3	3
Lodging/Camping	$173	$227	$170	$260	$218	$222
Restaurant & grocery	$79	$114	$107	$140	$99	$114
Transportation (incl gas)	$57	$54	$50	$73	$58	$62
Shopping/souvenirs	$72	$90	$74	$113	$92	$94
Recreation/Tour/Entrance/Permit fees	$100	$166	$96	$113	$69	$106
Spa/spiritual/metaphysical	$113	$114	$55	$132	$119	$119
Other	$140	$98	$115	$139	$79	$121

Verde Valley Tourism Survey 2014-2015

What general activities did you participate in while in the Verde Valley?

	Verde Valley community where the survey was collected					
	Camp Verde	Clarkdale	Cottonwood	Sedona	Jerome	Overall
	Percent (%)	Percent (%)	Percent (%)	Percent (%)	Percent (%)	Percent (%)
Dining	43.3%	73.0%	68.9%	71.9%	67.2%	67.1%
Shopping	36.8%	59.0%	55.7%	63.0%	68.4%	59.2%
Hiking	28.6%	32.0%	41.1%	69.7%	36.0%	48.4%
Art galleries/Museums	23.8%	41.6%	30.1%	47.2%	55.6%	42.2%
Area creeks or rivers	21.2%	33.7%	32.8%	54.2%	24.4%	37.7%
Jeep/Off-Highway Vehicle Tours	14.7%	23.0%	19.6%	46.5%	13.7%	28.0%
Wineries/Tasting Rooms	10.8%	21.3%	42.3%	26.4%	22.8%	26.7%
Birdwatching or observing wildlife	18.6%	19.7%	7.4%	16.1%	13.0%	14.2%
Events/Festivals please define	14.3%	12.9%	14.6%	9.7%	4.7%	10.5%
Spa	3.5%	11.8%	5.7%	16.8%	4.0%	9.7%
Golfing	3.5%	7.3%	9.3%	11.9%	4.4%	8.4%
Camping/RV stay	15.6%	6.7%	11.2%	4.5%	7.7%	8.1%
Mountain or Road Biking	4.8%	3.9%	3.8%	9.5%	3.3%	5.9%
Rock Climbing	2.6%	2.8%	3.3%	6.6%	2.6%	4.3%

Verde Valley Tourism Survey 2014-2015

What Camp Verde attractions did you visit on this trip to the Verde Valley?

	Verde Valley community where the survey was collected					
	Camp Verde	Clarkdale	Cottonwood	Sedona	Jerome	Overall
	Percent (%)	Percent (%)	Percent (%)	Percent (%)	Percent (%)	Percent (%)
Montezuma Castle/Well National Monument	22.3%	56.2%	67.2%	60.9%	62.0%	51.7%
Out of Africa	82.1%	15.7%	23.4%	20.2%	17.8%	36.2%
Downtown Camp Verde	16.2%	21.3%	28.6%	29.8%	19.6%	23.9%
Fort Verde State Park	12.8%	14.6%	16.7%	25.0%	14.1%	18.0%
Cliff Castle Casino	10.8%	22.5%	22.9%	14.4%	19.6%	16.3%
Verde Valley Archeology Center	10.5%	7.9%	8.3%	15.7%	4.9%	10.9%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Verde Valley Tourism Survey 2014-2015

What Clarkdale attractions did you visit on this trip to the Verde Valley?

	Verde Valley community where the survey was collected					
	Camp Verde	Clarkdale	Cottonwood	Sedona	Jerome	Overall
	Percent (%)	Percent (%)	Percent (%)	Percent (%)	Percent (%)	Percent (%)
Verde Canyon Railroad	57.1%	86.5%	54.1%	51.7%	41.0%	58.8%
Tuzigoot National Monument	42.9%	21.8%	52.3%	44.9%	46.7%	41.6%
Copper Art Museum	30.2%	11.2%	25.6%	19.1%	20.0%	19.8%
Clarkdale Arts & Entertainment District	9.5%	4.7%	12.8%	18.0%	14.3%	12.7%
Verde River Access Point	9.5%	2.9%	11.6%	10.5%	9.5%	8.9%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Verde Valley Tourism Survey 2014-2015

What Cottonwood attractions did you visit on this trip to the Verde Valley?

	Verde Valley community where the survey was collected					
	Camp Verde	Clarkdale	Cottonwood	Sedona	Jerome	Overall
	Percent (%)	Percent (%)	Percent (%)	Percent (%)	Percent (%)	Percent (%)
Historic Old Town Cottonwood	68.6%	64.6%	63.7%	70.1%	69.8%	67.0%
Blazin' M Ranch	14.3%	24.4%	46.4%	13.7%	10.3%	26.9%
Dead Horse Ranch State Park	37.1%	20.7%	15.3%	21.8%	19.8%	20.1%
Old Town Center for the Arts	14.3%	12.2%	18.7%	21.8%	23.8%	19.4%
Old Jail Trail	14.3%	4.9%	9.5%	8.5%	7.1%	8.8%

Verde Valley Tourism Survey 2014-2015

What Jerome attractions did you visit on this trip to the Verde Valley?

	Verde Valley community where the survey was collected					
	Camp Verde	Clarkdale	Cottonwood	Sedona	Jerome	Overall
	Percent (%)	Percent (%)	Percent (%)	Percent (%)	Percent (%)	Percent (%)
Galleries/Shops	62.7%	65.5%	62.1%	60.9%	83.9%	69.0%
Historic Jerome/Ghost Towns	61.8%	55.2%	53.9%	60.9%	51.2%	56.0%
Jerome State Historic Parks	34.3%	28.4%	27.0%	32.4%	29.3%	30.1%
Wineries/Tasting Rooms	19.6%	19.0%	31.3%	23.4%	24.0%	24.5%
Music/Special Events	7.8%	5.2%	7.4%	4.3%	7.9%	6.4%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Verde Valley Tourism Survey 2014-2015

What Sedona attractions did you visit on this trip to the Verde Valley?

	Verde Valley community where the survey was collected					
	Camp Verde	Clarkdale	Cottonwood	Sedona	Jerome	Overall
	Percent (%)	Percent (%)	Percent (%)	Percent (%)	Percent (%)	Percent (%)
Red Rock Scenic Byway	58.2%	55.7%	53.9%	63.8%	55.3%	59.1%
Oak Creek Canyon	45.5%	58.7%	57.1%	63.2%	57.4%	59.1%
Uptown Sedona	47.0%	62.3%	56.2%	63.8%	52.5%	58.8%
Chapel of the Holy Cross	38.8%	55.1%	49.5%	58.9%	46.5%	52.9%
Tlaquepaque/Hillside	27.6%	43.1%	36.9%	43.7%	34.8%	39.4%
Sedona Airport Scenic Overlook	20.1%	35.9%	35.0%	48.4%	28.4%	38.7%
Slide Rock and/or Red Rock State Park	35.1%	21.6%	30.0%	42.6%	31.6%	35.4%
Red Rock Crossing	14.2%	21.6%	24.9%	36.5%	19.1%	27.8%
Vortex Sites	16.4%	27.5%	18.0%	36.1%	20.6%	27.4%
Resort	14.2%	38.9%	23.3%	28.4%	19.9%	25.8%
Palatki and/or Hononki Heritage Sites	9.7%	9.0%	11.0%	17.7%	9.2%	13.4%
Sedona Heritage Museum	7.5%	8.4%	6.9%	14.5%	7.8%	10.7%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Verde Valley Tourism Survey 2014-2015

On a scale of 1 to 5 where 1 is low and 5 is high please indicate your overall satisfaction with your experiences in the Verde Valley

	Verde Valley community where the survey was collected					
	Camp Verde	Clarkdale	Cottonwood	Sedona	Jerome	Overall
	Mean	Mean	Mean	Mean	Mean	Mean
Attractions	4.6	4.5	4.6	4.7	4.5	4.6
Activities	4.4	4.5	4.4	4.6	4.4	4.5
Accommodations	4.3	4.4	4.5	4.6	4.4	4.5
Entertainment	4.1	4.1	4.2	4.1	4.0	4.1
Shopping	3.9	4.1	4.0	4.1	4.2	4.1
Food & Drink	4.2	4.3	4.4	4.4	4.4	4.4
Prices	3.8	3.9	3.9	3.7	3.8	3.8
Visitor Information	4.4	4.5	4.4	4.7	4.4	4.5

Verde Valley Tourism Survey 2014-2015

How many people are in your party including yourself?

	Verde Valley community where the survey was collected					
	Camp Verde	Clarkdale	Cottonwood	Sedona	Jerome	Overall
	Mean	Mean	Mean	Mean	Mean	Mean
Number of women	1.5	2.0	1.4	1.5	1.9	1.6
Number of men	1.4	1.8	1.3	1.3	1.6	1.4
Number of children under 18 years of age?	2.1	1.5	2.1	1.8	2.2	2.0

Verde Valley Tourism Survey 2014-2015

Who is traveling with you on this trip?

	Verde Valley community where the survey was collected					
	Camp Verde	Clarkdale	Cottonwood	Sedona	Jerome	Overall
	Percent (%)	Percent (%)	Percent (%)	Percent (%)	Percent (%)	Percent (%)
Family only	67.6%	64.1%	68.9%	72.1%	57.4%	66.9%
Family and Friends	23.3%	20.4%	16.6%	18.8%	28.8%	21.2%
Friends only	6.4%	11.7%	10.3%	7.4%	10.7%	9.0%
Nobody, traveling alone	2.0%		3.5%	1.1%	2.7%	2.0%
Organized group	.3%	2.4%	.2%	.6%	.5%	.6%
Business Associates	.3%	1.5%	.5%			.3%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Verde Valley Tourism Survey 2014-2015
What is your Annual Household Income?

	Verde Valley community where the survey was collected					
	Camp Verde	Clarkdale	Cottonwood	Sedona	Jerome	Overall
	Percent (%)	Percent (%)	Percent (%)	Percent (%)	Percent (%)	Percent (%)
Less than $40,000	16.1%	5.4%	6.7%	3.9%	8.7%	7.4%
$40,000 - $59,999	18.7%	11.4%	14.4%	8.6%	12.2%	12.2%
$60,000 - $79,999	16.1%	14.5%	14.2%	15.7%	14.6%	15.1%
$80,000 - $99,999	15.5%	17.5%	16.0%	14.0%	17.0%	15.5%
$100,000 - $119,999	12.9%	12.7%	13.3%	15.2%	12.2%	13.6%
$120,000 - $139,999	5.5%	6.6%	7.7%	11.2%	7.6%	8.5%
$140,000 - $159,999	5.8%	6.6%	8.1%	8.2%	8.3%	7.7%
$160,000 - $179,999	1.6%	7.2%	3.3%	6.2%	4.3%	4.6%
$180,000 - $199,999	1.0%	1.2%	3.3%	4.5%	4.1%	3.4%
$200,000+	6.8%	16.9%	13.0%	12.5%	11.1%	11.8%
	100%	100%	100%	100%	100%	100%
Average Household Income from mid-points	$89,193	$114,518	$108,814	$117,117	$108,108	$109,276