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UNIVERSITY
The W. A. Franke College of Business

Wickenburg Visitor Study



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Executive Summary

This survey of visitors to Wickenburg, Arizona was undertaken to gather more reliable local and regional data than is available from statewide or national panel surveys which contain too few cases to reliably represent visitation to this area. This survey process collected a total of 234 surveys from visitors to Wickenburg over a 12 month period from November 2010 through September 2011 – a sufficient sample to produce confidence in these results. This information will assist tourism professionals in Wickenburg with targeted marketing efforts, product development, and advocacy for an industry that is critical to the health of the regional economy.

The general profile of Wickenburg visitors is older travelers on day trips from the Greater Phoenix area, who have heard about Wickenburg's attractions and events from friends and family. Almost everyone has visited before, some many times, and they keep coming back for music concerts, festivals and theater performances, to shop for antiques, walk the historic downtown or hike the Hassayampa River Preserve. About half are from Arizona, mostly the Phoenix area, and parties consist of more women than men.

A summary of the specific findings of the Wickenburg visitor survey follows:

- The most important way people heard about Wickenburg was that they had been there before, followed by recommendations from friends and family, then by the Internet or online sources.
- Almost everyone (95.7%) had visited Wickenburg before; the average number of previous visits was 13.
- For two-thirds (65.0%) Wickenburg was the primary destination of their trip, while the other third were passing through to somewhere else (35.0%). Those passing through were most likely headed to San Diego, Las Vegas, the Grand Canyon, Sedona or the Greater Phoenix area.
- Phoenix led the list of other communities also visited on this trip (52.6%), followed by Sedona (34.5%), Prescott (29.3%), Congress (19.8%), Yarnell (19.0%), and Las Vegas (17.2%).
- The two main reasons people visit Wickenburg are leisure vacations (33.5%) and day trips (31.7%); followed by visiting friends and relatives (15.2%), weekend visits (11.7%), and climate relief (10.0%).
- Visitors travel almost entirely by automobile – three-fourths (78.2%) by private auto, one-tenth in an RV/Camper (10.3%), and 9.0% by rental car.
- Those visiting Wickenburg only for the day represented just over half of the sample (55.6%) with the remainder (44.4%) staying overnight. For day-trippers, the average number of hours spent in Wickenburg was 5.3 hours; for overnight visitors, the average number of nights was 8.7 nights.
- Half of overnight visitors (48.2%) stayed in hotel/motels, one in five (18.2%) stayed in a dude ranch, about one in 10 stayed with friends/ family (12.7%) or in an RV park (10.9%), 8.2% stayed in campgrounds, and 3.6% stayed in second homes.
- Those with the longest stays were in Second homes (120 nights), RV parks (from 5 to 120 nights), or dude ranches (4 to 28 nights).

- Travel patterns indicate that most survey respondents spent the “night before” in Wickenburg (30.9%), followed by Phoenix (9.8%), Surprise (5.7%), and Sun City West (4.9%). They planned to spend “tonight” in Wickenburg (37.0%), followed by Phoenix (6.5%), Surprise (4.6%) and Prescott (3.7%).
- Where are visitors from? About half are Arizona residents (46.3%), followed by Californians (14%). Next are – New York, Illinois and Wisconsin (at 3.7% each), then Ohio (3.3%), Nevada (2.8%), and Colorado (2.3%). In all, visitors from 29 states were captured in the survey sample.
- Three-fourths of all in-state visitors 77.1% are from the Greater Phoenix area or Phoenix MSA (metropolitan statistical area).
- Foreign visitors represented only a small percentage (5.6%) of the sample. The vast majority of these were from Canada (69.2%), followed by England (12.5%).
- Visitors were most interested in the two activities: Attending a music concert/festival (3.4 mean using a 1 to 5 scale) and Attending a theater performance/play (3.0 mean). Next, were Hiking/walking trails and Historic walking tours (both with mean of 2.9), followed by Antique shopping (2.7 mean).
- This interest translated into actual visits to these top-5: Music concert/festivals (43.1%); Antique shopping (37.9%); Hiking-walking trails (29.3%); Attending art shows (20.7%); and, Attending a theater performance/play (17.2%).
- The most visited specific attractions were: Desert Caballeros Western Museum (74%), Del E. Webb Center for the Performing Arts (35.3%), the Vulture Mine (27.7%) and the Hassayampa River Preserve (20.8%).
- Which special events in Wickenburg attracted the most visitors? Gold Rush Days (49.6%) and the Bluegrass Festival (47.2%) were by far the most attended; much further down the list were the Cowgirl Up event (17.1%), the Festival de Septiembre (17.1%), and the Cowboy Christmas Poetry Gathering (11.4%).
- Measured on a scale from one to 10 (where 10 is high), Wickenburg visitors rated their experiences at a high mean of 8.7. Wickenburg’s high percentage of return visitors keep coming back because they are very satisfied with their overall experiences in the community and the specific events and activities they attend.
- Average party size for Wickenburg is 2.7 persons (the same size as the 2010 Arizona average), although the median (or midpoint of all responses) of two persons -one man, one woman and no children- is more accurate.
- Party composition finds that more than half of all parties are Family members (52.9%), then Friends only (20.0%), Family and friends (15.3%), followed by those traveling alone (11.2%).
- Demographically, more women (58.7%) than men (41.3%) visit Wickenburg.
- Wickenburg visitors have an average age of 61 years, considerably older than the average for Arizona generally (47 years) – roughly two-thirds (65.4%) are over 60, and one-third is under 60.
- The average annual income of those who visit Wickenburg is \$77,907 – just slightly higher than the average for 2010 visitors statewide of \$75,610.

- What did visitors spend in Wickenburg? The largest daily mean expenditures were for lodging (\$123/day), followed by shopping/art/antiques (\$66/day), restaurants/grocery (\$55/day), transportation (\$39/day), and recreation/tour/event ticket fees (\$39/day).
- Direct spending by out-of-region visitors to Wickenburg totaled \$9.3 million, producing total annual economic output of \$16.6 million for Maricopa County. This economic activity supported some 160 full-time equivalent (FTE) jobs and state and local tax revenue of \$2.47 million.

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Wickenburg Tourism Study

Introduction

The tourism and hospitality industries are vitally important to the economic growth and stability of the U.S. economy. Tourism is the nation's top services export, one of the top three industries, and one of the nation's largest employers. In Arizona, the 2008-09 recession demonstrated once again how central tourism is as an economic driver and generator of tax revenue for the state and local economies. Going forward, Arizona's rural communities will be looking for ways to revive and reinvigorate their tourism offerings and this research can be an important part of that effort. Research of this type is a crucial tool to inform and help guide local communities in their product development and tourism promotion efforts.

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

Located 58 miles north of Phoenix, Wickenburg is a town of 6,363 people, according to the 2010 Census. The area could be characterized as an extension of the Greater Phoenix metropolitan area, and as such is a destination for day visitors from Phoenix and for pass-through visitors traveling on Highway 93 to Kingman/I-40 and Las Vegas or west on Highway 60. Its unique tourism attractions include antique shopping and walking tours of historic downtown Wickenburg, hiking the Hassayampa River Preserve, taking in the Desert Caballeros Museum, staying at one of Arizona's iconic dude ranches, or attending music, theatre and dance performances at the Del E. Webb Performing Arts Center.

The information gleaned from this survey forms a picture of tourism in Wickenburg, Arizona that can shape the tourism planning efforts of this and other north Phoenix communities, such as Anthem, which is growing to its east. The data from this report can help this area pursue regional marketing strategies and develop products to entice visitors to explore the area and increase the economic impact of tourism. Finally, the data in this study will allow Wickenburg area tourism leaders to pursue sources of outside funding for tourism promotion and use these marketing dollars to further a regional tourism vision.

Research Methods

In 2010 the Arizona Office of Tourism (AOT) contracted with the Arizona Hospitality Research & Resource Center (AHRRC) at Northern Arizona University to conduct research on tourism in Wickenburg as part of an ongoing plan to gather regional and community based tourism data statewide. An information meeting to discuss the tourism survey was convened by AOT at the Wickenburg Chamber of Commerce to introduce tourism leaders and representatives to the survey idea and methods. AOT indicated that it was willing to fund the community surveys if the communities were willing to "champion" a local effort and muster volunteers to help distribute and collect surveys according to a prescribed survey schedule, and to promote the project among their respective constituents. All representatives present agreed to participate and were eager for the opportunity to receive area specific tourism data.

The Wickenburg tourism survey was designed by the professional staff at the AHRRC in conjunction with the AOT research staff and representatives of Wickenburg tourism businesses. The instrument was developed in Teleform™, a computerized scanning program that affords rapid data capture of the completed questionnaires. The two page survey was developed to obtain information on visitors' origins, demographics, activities in the area, attractions visited, reasons for visiting, travel patterns, information sources and expenditures made in the various communities. The surveys were collected according to a seasonally adjusted stratified sample based on historic visitation patterns. The collection schedule was randomized to ensure that surveys were distributed on both weekdays and weekends. Each participating survey site was provided a fixed number of surveys to be distributed and collected according to a predetermined survey schedule. Over the course of the year-long study, surveys were collected during one week of each month.

The survey was designed to be self-administered, i.e., Visitors Bureau, museum or attraction staff handed the survey to visitors who completed and returned it to staff. Completed surveys were forwarded to NAU on a monthly basis. The identified community tourism leader was responsible for distributing the surveys to the various participating entities, according to the survey schedule. The tourism leaders were invaluable in this process as they also encouraged participation in the survey and returned data to NAU once collected. The hard work of those in the area resulted in a moderate sample. A total of 234 surveys were collected for the year, providing a 95% confidence level and 7% margin of error for the validity of the results. While this is fewer surveys than hoped for, tourism champions are nevertheless to be commended for their hard work in collecting them. The remainder of this report presents the survey results for Wickenburg.

The majority of completed Wickenburg surveys were collected at the Chamber of Commerce's Visitor Center, at the Del E. Webb Center for the Performing Arts, and the Desert Caballeros Museum. Most were collected during the high season for tourism in Wickenburg, which is from September through April; few surveys were collected during the slow summer season from May through August. Table 1 shows the number of surveys collected monthly.

Table 1: Number of Surveys by Month

	Count	Percent
January 2011	18	7.7%
February 2011	53	22.6%
March 2011	0	0%
April 2011	15	6.4%
May 2011	6	2.6%
June 2011	8	3.4%
July 2011	2	.9%
August 2011	2	.9%
September 2011	31	13.2%
October 2011	0	0%
November 2010	75	32.1%
December 2010	24	10.3%
Total	234	100.0%

The first question asked visitors to Wickenburg how they heard about the community. The largest number (44.9%) knew about Wickenburg because they had been there before, followed by one-third (34.2%) who heard by word-of-mouth from friends or relatives. The third largest source of information about the community was Online/Website (14.7%). A substantial cohort (21.3%) noted some other source, the most common of which was from “Friends” – essentially the same as word-of-mouth. If the seven respondents who chose Other-Friends/Family is added to the 34.2% who chose word-of-mouth, that puts this total at 36.0%, just behind those who had been to Wickenburg before. See Tables 2 and 3.

Table 2: How did you hear about Wickenburg?

	Count	Percent
Been there before	101	44.9%
Word-of-Mouth	77	35.9%
Other	48	21.3%
Online/Website	33	14.7%
Newspaper	18	8.0%
Magazine	8	3.6%
TV	3	1.3%
Social Networking Sites	3	1.3%
Radio	2	.9%

Table 3: How did you hear about Wickenburg – Other.

How did you hear about Wickenburg – Other Means?	#	Percent
Family	7	10.8%
Brochure	3	4.6%
Chamber	3	4.6%
Driving By	2	3.1%
Friends	2	3.1%
Tour Book	2	3.1%
AAA	1	1.5%
ACA	1	1.5%
Anita's	1	1.5%
Artist In Show	1	1.5%
Artist Website	1	1.5%
Bluegrass Fest	1	1.5%
Bluegrass Friends	1	1.5%
Born In Phx Native AZ	1	1.5%
Daughter-Pam	1	1.5%
Dove Hunting 24 Years	1	1.5%
Down Road	1	1.5%
Drive By	1	1.5%
Driving Through	1	1.5%
Flyer In Sun City	1	1.5%
Fodors Travel	1	1.5%
Friend	1	1.5%

How did you hear about Wickenburg – Other Means?	#	Percent
Friend From Sun City	1	1.5%
Friend-This Time	1	1.5%
Golf Friends	1	1.5%
Guidebook (Lonely Planet)	1	1.5%
Live In Sun City West	1	1.5%
Lived In Wickenburg Worked Here	1	1.5%
Local Promo At Hotel & Magazines	1	1.5%
Location Of My Child's Rehab Facility	1	1.5%
Map	1	1.5%
Meadows	1	1.5%
Parents Here Before	1	1.5%
Passing Through	1	1.5%
Ranch	1	1.5%
Rancho De Los Caballeros	1	1.5%
Relatives	1	1.5%
Rex Long	1	1.5%
Season Tickets	1	1.5%
Show Up	1	1.5%
Sister Lives Here	1	1.5%
Spouse	1	1.5%
The Nature Conservancy	1	1.5%

How did you hear about Wickenburg – Other Means?	#	Percent
Time Share	1	1.5%
Tour Guide	1	1.5%
Travel	1	1.5%
Travel Guide	1	1.5%
Travelguide Book	1	1.5%

How did you hear about Wickenburg – Other Means?	#	Percent
Traveling Thru	1	1.5%
Walking By	1	1.5%
Website Vague Not Easy To Plan	1	1.5%
Worked Here In 60's	1	1.5%
Total	65	

The next question addressed whether or not Wickenburg was the primary destination of those visitors surveyed. For two-thirds (65.0%) Wickenburg *was* the primary destination of their trip, while the other third were passing through on their way to somewhere else (35.0%). See Table 4.

Table 4: Is Wickenburg the primary destination of your trip?

	Count	Percent
Yes	147	65.0%
No	79	35.0%
Total	226	100.0%

If Wickenburg was not the primary destination of the trip, respondents were asked to specify where they were heading. Of interest, the largest cohort of those passing through Wickenburg (16.7%) were on their way to San Diego, California, followed by some traveling to see a show, perhaps in Las Vegas (6.7%); followed by many other destinations, including the Grand Canyon, Sedona, the greater Phoenix area, and many others who were just touring the state. See Table 5

Table 5: If Wickenburg is not the primary destination of your trip, what location is?

	#	Percent
San Diego	10	16.7%
To See Show	4	6.7%
Grand Canyon	2	3.3%
Scottsdale	2	3.3%
Snow Birds In El Mirage AZ	2	3.3%
All Of Arizona	1	1.7%
All Over Arizona	1	1.7%
All Winter Festivals	1	1.7%
Baby Shower/Surprise AZ	1	1.7%
Calif, Mo	1	1.7%
Cave Creek	1	1.7%
Central Arizona	1	1.7%
Cottonwood	1	1.7%
Del Webb	1	1.7%
Del Webb Show	1	1.7%
Flying E Ranch	1	1.7%
For Today	1	1.7%

	#	Percent
Here And Cottonwood	1	1.7%
Jerome	1	1.7%
Just Touring The State	1	1.7%
Las Vegas	1	1.7%
Las Vegas/Laughlin NV	1	1.7%
Live In Sun City AZ	1	1.7%
Maricopa	1	1.7%
Mesa	1	1.7%
New Orleans	1	1.7%
North Phoenix	1	1.7%
Oceanside CA	1	1.7%
Parker	1	1.7%
Phoenix	1	1.7%
Prescott	1	1.7%
Salome	1	1.7%
Sedona	1	1.7%
Sedona, Phoenix, Palm Springs	1	1.7%

	#	Percent
Snowbirds	1	1.7%
Sun City	1	1.7%
Sun City West	1	1.7%
Surprise	1	1.7%
Tonight Only	1	1.7%
Touring Central Valley	1	1.7%

	#	Percent
Travel, Visit In-Laws/Friends. Canyon De Chelly, Monument Valley	1	1.7%
Vulture Mine	1	1.7%
We Winter In Sun City West	1	1.7%
Winter In Sun City West	1	1.7%
Yuma	1	1.7%

Next, respondents were asked which of a number of other communities they were also visiting on this trip. As shown in Table Six which follows, the most popular of these was not surprisingly Phoenix (52.6%), followed by Sedona (34.5%), nearby Prescott (29.3%), Congress (19.8%), then Yarnell (19.0%), and finally Las Vegas (17.2%). The low percentage for Las Vegas may indicate that many of those passing through on Highway 93 bound for Las Vegas do not tend to stop in Wickenburg. See Table 6.

Table 6: Do you plan to visit any of the following communities on this trip?

	Count	Percent
Phoenix Metro	61	52.6%
Sedona	40	34.5%
Prescott	34	29.3%
Congress	23	19.8%
Yarnell	22	19.0%
Las Vegas	20	17.2%
Other	20	17.2%

A number of “other” communities (17.2%) were also listed in Table Six and these are shown in Table 7 below – no particular communities stand out on this list.

Table 7: Other communities you plan to visit on this trip?

	Count	Percent
Laughlin NV	2	5.4%
Surprise	2	5.4%
Apache Junction	1	2.7%
Bagdad	1	2.7%
Camp Verde, Flagstaff	1	2.7%
Canyon De Chelly, Monument Canyon	1	2.7%
Canyon De Chelly, Monument Valley, Sedona, Wupatki	1	2.7%
Valley, Sedona, Wupatki	1	2.7%
Cottonwood	1	2.7%
Desert Area - Phx Metro Area	1	2.7%
Flagstaff	1	2.7%
Grand Canyon	1	2.7%

	Count	Percent
Jerome	1	2.7%
Jerome, Tombstone	1	2.7%
Maricopa	1	2.7%
Mesa, Show Low	1	2.7%
No	1	2.7%
None	1	2.7%
Patagonia	1	2.7%
Payson	1	2.7%
Phoenix	1	2.7%
Scottsdale	1	2.7%
Tucson	1	2.7%
Yuma	1	2.7%

When asked to characterize the primary purpose of their visit to the Wickenburg area, the most important reason, as noted by a third of visitors was “Vacation – Leisure” (33.5%), which was followed closely by Day trips (31.7%). Next, were those Visiting friends and relatives (15.2%), followed by those on Weekend visits (11.7%), and those seeking Climate relief (10.0%). Smaller percentages consisted of visitors who were Just passing through (5.7%) or scouting Relocation areas (3.5%). See Table 8.

Table 8: Primary purpose of your current visit to this area?

	Count	Percent
Vacation-Leisure	77	33.5%
Day Trip	73	31.7%
Other	39	17.0%
Visiting Friends or Relatives	35	15.2%
Weekend Visit	27	11.7%
Climate	23	10.0%
Just Passing Through	13	5.7%
Business Travel	9	3.9%
Relocation	8	3.5%

Those who selected some “other” reason for their visit were largely there to see specific concerts or shows at the Del E. Webb Performing Arts Center - Bluegrass festival, Cowboy poetry, and Western art shows. See all responses for Other in Table 9.

Table 9: Other primary purpose of your current visit to this area?

	Count	Percent		Count	Percent
Bluegrass Festival	5	11.1%	Golf	1	2.2%
Bluegrass	4	8.9%	Leather Show	1	2.2%
Concert	3	6.7%	Previous Visitor	1	2.2%
Cowboy Poetry	2	4.4%	Scenic Drive	1	2.2%
Museum & The Heritage House	2	4.4%	See Western Art Show	1	2.2%
Webb Center	2	4.4%	Show	1	2.2%
Winter Residence	2	4.4%	Show & Art	1	2.2%
6 Mo Volunteer	1	2.2%	Snowbird	1	2.2%
Article In Republic	1	2.2%	Snowbirds	1	2.2%
Bluegrass Fest	1	2.2%	This Concert	1	2.2%
Came For Blue Grass Festival	1	2.2%	To See The Show	1	2.2%
Cowboy Gathering	1	2.2%	Winter Home	1	2.2%
Cowboy Poets	1	2.2%	Winter Home-6 Mos.	1	2.2%
Cowgirl Up	1	2.2%	Winter Residents	1	2.2%
Del E. Webb Show	1	2.2%	Winter Visitor	1	2.2%
Entertainment	1	2.2%	Wintering With Horse	1	2.2%
				45	100.0%

How did visitors travel to Wickenburg? They traveled almost entirely by automobile – three-fourths (78.2%) by private auto, another tenth (10.3%) by RV/Camper, and 9.0% by rental car. A small percentage listed some “other” travel means, which were all some other form of ground transportation, shuttle or transfer. See Tables 10 and 11.

Table 10. Indicate your primary mode of transportation to Wickenburg

	Count	Percent
Private auto	183	78.2%
RV-Camper	24	10.3%
Rental car	21	9.0%
Other	9	3.8%
Motorcycle	1	0.4%
Fly In – Wickenburg Airport	1	0.4%
Tour bus	0	0.0%
Valley Metro-Wickenburg Connection	0	0.0%

Table 11. Other mode of transportation to Wickenburg

	Count	Percent
Bicycle	2	15.4%
Hotel Transfer	2	15.4%
A Wick Shuttle	1	7.7%
Air To Phoenix	1	7.7%
College Van-12 Persons	1	7.7%
Flew To Phoenix Picked Up By Family	1	7.7%
Fly In Las Vegas	1	7.7%
Fly-In Phx	1	7.7%
Plane To Phoenix	1	7.7%
Wick Shuttle	1	7.7%

What was the average length of stay for visitors to Wickenburg? This question was asked as both hours only and number of nights. For those on day trips (55.6% of the total sample), the average number of hours was 5.3 hours and median (or midpoint) number of hours was 5.0 hours. For those staying overnight in the area (44.4% of the sample), the average number of nights was 8.7 nights, although the median number – which is probably a more realistic estimate – was 3.0 nights. (The mean can be skewed upward by a small number of people with very long stays.) See Table 12.

Table 12. How long did you stay in Wickenburg?

	Mean	Median
If a day trip how many hours?	5.3	5.0
If staying overnight how many nights?	8.7	3.0

The next question asked visitors how many times, including this trip, they had visited Wickenburg. Only a very small percentage (4.3%) had never been before – or only about 1 in 20 visitors were new visitors. Most had visited before – one fifth (19.8%) had visited once before; 13.0% had visited twice; and many others had visited three to 10 times before. About one-tenth (12.1%) had visited 11 through 20 times, and almost as many had visited up to 50 times before. Obviously, Wickenburg is a destination that attracts large numbers of repeat visitors. As shown in Table 14, the average number of previous visits was 13 and the median number was five. See Tables 13 and 14.

Table 13. Including this trip, how many times (total) have you visited Wickenburg?

	Count	Percent
Never been to Wickenburg before	9	4.3%
1 time before	41	19.8%
2 times before	27	13.0%
3 times before	16	7.7%
4 times before	9	4.3%
5 times before	12	5.8%
6 times before	13	6.3%
7 times before	8	3.9%
8 times before	3	1.4%
10 times before	17	8.2%
11 through 20 times	25	12.1%
21 through 50 times	18	8.7%
More than 50 times	9	4.3%
Total	207	100.0%

Table 14. Including this trip how many times (total) have you visited Wickenburg?

	Mean	Median	Maximum
Including this trip how many times (total) have you visited Wickenburg?	13	5	400

Those spending the night in Wickenburg were asked to specify the type of lodging they used. Half (48.2%) were staying in conventional hotel/motel lodging properties, while almost one in five parties (18.2%) were staying in one of Wickenburg’s iconic Dude ranches. About one in ten stayed with friends and family (12.7%), or in an RV park (10.9%). Finally, 8.2% stayed in campgrounds and 3.6% stayed in second homes in the area.

Which type of visitors had the longest stays? To answer this question, responses for type of lodging were cross-tabbed by the length of stay to arrive at the data in Table 16. Those who had the longest stays were those staying in Second homes (120 nights) or those staying in RV parks (from 5 to 120 nights). It should be noted, however, that these two categories represented the smallest two cohorts in Table 15 and a small number of parties – in other words, these lengths of stay were not typical. Next in importance for longest lengths of stay were those staying at dude ranches (4 to 28 nights). See Tables 15 and 16 (responses for other).

Table 15. If you are staying overnight in Wickenburg what type of lodging are you using?

	Where are you staying?		If staying overnight how many nights?		
	Count	Percent	Mean	Median	Maximum
Hotel-Motel	53	48.2%	3	2	14
Guest/Dude Ranch	20	18.2%	7	4	28
Home of Family/Friends	14	12.7%	4	3	10
RV Park	12	10.9%	18	5	120
Campground	9	8.2%	4	4	6
Second Home	4	3.6%	120	120	120
Other Lodging	4	3.6%	4	4	7
B&B-Casitas	1	0.9%	.	.	.

Table 16. Wickenburg Visitor Study - Other lodging you are using?

	If staying overnight how many nights		
	Mean	Median	Maximum
BLM Land	2	2	2
Day Trip	.	.	.
Flying E Ranch	2	2	2
Los Cab	90	90	90

To help determine the travel patterns of visitors, they were asked where they spent “last night” and where they plan to stay “tonight.” Table 17 shows responses for last night, where the most important cohorts stayed in Wickenburg (30.9%), followed by Phoenix (9.8%), Surprise (5.7%), and Sun City West (4.9%). See Table 17.

Table 17. In what city did you spend last night?

	Count	Percent		Count	Percent
Wickenburg	38	30.9%	Kingman	2	1.6%
Phoenix	12	9.8%	Peoria	2	1.6%
Surprise	7	5.7%	Salome	2	1.6%
Sun City West	6	4.9%	Sedona	2	1.6%
Mesa	5	4.1%	Wittman	2	1.6%
Tucson	4	3.3%	Apache Junction	1	0.8%
Home	3	2.4%	Benson	1	0.8%
Los Angeles CA	3	2.4%	Big River CA	1	0.8%
Prescott	3	2.4%	Casa Grande	1	0.8%
Scottsdale	3	2.4%	Deming NM	1	0.8%
Sun City	3	2.4%	Edgewood NM	1	0.8%
Cave Creek	2	1.6%	Grand Canyon	1	0.8%
Chandler	2	1.6%	Heber City UT	1	0.8%
Congress	2	1.6%	Holbrook	1	0.8%

	Count	Percent
Hope	1	0.8%
Las Vegas-Laughlin-Wickenburg	1	0.8%
London (UK)	1	0.8%
Norristown	1	0.8%
On The Train Traveling	1	0.8%
Petona	1	0.8%

	Count	Percent
Phoenix-Peoria	1	0.8%
Tombstone	1	0.8%
Victorville CA	1	0.8%
Wickiup	1	0.8%
Yarnell	1	0.8%
Total	123	100.0%

Table 18 presents the information on where visitors plan to spend tonight. Again, more than a third (37.0%), no doubt those long-stay visitors, planned to stay in Wickenburg, followed once again by Phoenix (6.5%), Surprise (4.6%) and Prescott (3.7%). Thus, in terms of travel patterns, the take-away is the close connection with the Greater Phoenix area. See the full list of responses to follow.

Table 18. In what city will you spend tonight?

	Count	Percent
Wickenburg	40	37.0%
Phoenix	7	6.5%
Surprise	5	4.6%
Prescott	4	3.7%
Sun City	4	3.7%
Home	3	2.8%
Las Vegas NV	3	2.8%
Peoria	3	2.8%
Sun City West	3	2.8%
Chandler	2	1.9%
Congress	2	1.9%
Cottonwood	2	1.9%
Flagstaff	2	1.9%
Sedona	2	1.9%
Tucson	2	1.9%
Anaheim CA	1	0.9%
Blythe CA	1	0.9%
Bullhead City	1	0.9%
Cave Creek	1	0.9%
Corona CA	1	0.9%
Glendale	1	0.9%

	Count	Percent
Grand Canyon	1	0.9%
Hope	1	0.9%
Lake Havasu	1	0.9%
Lake Havasu City	1	0.9%
Los Angeles CA	1	0.9%
Maricopa	1	0.9%
Mesa	1	0.9%
Norristown	1	0.9%
Parker	1	0.9%
Phoenix-Peoria	1	0.9%
Salome	1	0.9%
Scottsdale	1	0.9%
Sonoita	1	0.9%
Sun City AZ	1	0.9%
Tucson (Home)	1	0.9%
Unknown	1	0.9%
Wickiup	1	0.9%
Wittmann	1	0.9%
Yarnell	1	0.9%
Total	108	99.7%

What are the origins of visitors to Wickenburg? Where are they from? As shown below, about half are Arizona residents (46.3%), followed by those from California (14%). Next in importance are a series of states that typically send visitors to Arizona – New York, Illinois and Wisconsin (at 3.7% each), followed by Ohio (3.3%), Nevada (2.8%), and Colorado (2.3%). In all, visitors from 29 states were captured in the survey sample. See Table 19.

Table 19. What is your state of origin?

	Count	Percent		Count	Percent
Arizona	99	46.3%	Connecticut	2	.9%
California	30	14.0%	Florida	2	.9%
New York	8	3.7%	South Dakota	2	.9%
Illinois	8	3.7%	Texas	2	.9%
Wisconsin	8	3.7%	Utah	2	.9%
Ohio	7	3.3%	New Mexico	2	.9%
Nevada	6	2.8%	Massachusetts	1	.5%
Colorado	5	2.3%	Alaska	1	.5%
Idaho	4	1.9%	Vermont	1	.5%
Washington	4	1.9%	Pennsylvania	1	.5%
Michigan	3	1.4%	Virginia	1	.5%
Iowa	3	1.4%	South Carolina	1	.5%
Montana	3	1.4%	Kentucky	1	.5%
Kansas	3	1.4%	Indiana	1	.5%
Oregon	3	1.4%			

Those who were in-state residents were asked to specify their Arizona city of origin. These responses are shown in Table 21 below. The most important contributors are: Sun City (18.9%), Surprise (14.7%), Phoenix (12.6%), Glendale (6.3%), and Mesa (5.3%). When percentages of all cities that are part of the Greater Phoenix metropolitan area are added together, the total for the Phoenix MSA (metropolitan statistical area) is 77.1%, accounting for more than three-fourths of all visitors. See all communities in Table 20.

Table 20. Arizona city of origin

	Count	Percent		Count	Percent
Sun City	18	18.9%	Fort Lowell	1	1.1%
Surprise	14	14.7%	Goodyear	1	1.1%
Phoenix	12	12.6%	Guadalupe	1	1.1%
Glendale	6	6.3%	Kingman	1	1.1%
Mesa	5	5.3%	Lakeside	1	1.1%
Prescott	3	3.2%	Laveen	1	1.1%
Wickenburg	3	3.2%	Maricopa	1	1.1%
Cave Creek	2	2.1%	Mission	1	1.1%
Chandler	2	2.1%	New River	1	1.1%
Flagstaff	2	2.1%	Oro Valley	1	1.1%
Peoria	2	2.1%	Parker	1	1.1%
Tempe	2	2.1%	Salome	1	1.1%
Tucson	2	2.1%	Scottsdale	1	1.1%
Anthem - Desert Hills	1	1.1%	Skull Valley	1	1.1%
Buckeye	1	1.1%	Sonoita	1	1.1%
Camp Verde	1	1.1%	Sun Lakes	1	1.1%
Chino Valley	1	1.1%	Tonopah	1	1.1%
Congress	1	1.1%			
			Total	95	100.0%

A small number of foreign visitor parties (13) appeared in the Wickenburg sample – representing 5.6% of the total sample. The largest number of foreigners were from Canada, which represented two-thirds of all foreign visitors (69.2%). Next, were two parties from England (12.5%), followed by one party each from Germany and Switzerland. See Table 21.

Table 21. Country of origin

	Count	Percent
Canada	9	69.2%
England	2	15.4%
Germany	1	7.7%
Switzerland	1	7.7%
Total	13	100.0%

An issue of importance to tourism industry officials is the amount of money visitor parties spend in their community – the economic impact. Thus, the survey asked visitors to estimate their expenditures in the key categories of lodging, restaurants/grocery, transportation (including gas), shopping/art/antiques, and recreation/tour/event ticket fees. These results are shown in Table 22, along with the number of people these expenses cover, or party size, which averages three people, with the median at two people. The largest daily mean expenditures were for lodging at \$123/day, followed by restaurants/grocery at \$55/day, transportation at \$39/day, shopping/art/antiques at \$66/day, and recreation/tour/event ticket fees at \$39/day. In all cases median expenditures (midpoints in the sample) were lower than the average or mean, reflecting the influence that the somewhat elevated “maximum” expenditures played in bringing the average up. See Table 22.

Table 22. Spending per day in Wickenburg?

Spending per day	Mean	Median	Maximum
Number of people expenses cover	3	2	62
Lodging-Camping	\$123	\$90	\$610
Restaurant & Grocery	\$55	\$40	\$225
Transportation (including gas)	\$39	\$30	\$180
Shopping/Arts/Antiques	\$66	\$40	\$500
Recreation/Tour/Event Ticket Fees	\$39	\$24	\$400
Other	\$26	\$20	\$136

A number of visitors also listed “other” expenditures, which are shown in Table 23. Many of these could have been included in the initial set of categories, but are included here as they were entered on the forms.

Table 23. Other expenditures in Wickenburg

	#	%		#	%
Museum	2	11.2%	Furnishing New Home	1	5.6%
Approx \$2000	1	5.6%	Garcias Cemetary	1	5.6%
Approx \$280-P/Day For All Expenses	1	5.6%	Golf	1	5.6%
Art Club Arts	1	5.6%	Meals	1	5.6%
ATV	1	5.6%	Motel Food	1	5.6%
Cocktails & Nightlife	1	5.6%	None Of Your Business	1	5.6%
Concert	1	5.6%	Resident Shop Mostly In Wickenburg	1	5.6%
Crafts	1	5.6%	Riding	1	5.6%
Food, Gifts	1	5.6%	Total	18	100%

The next question asked visitors to indicate their level of interest in participating in a number of activities in the Wickenburg area on their trip. Their interest was measured on a scale from 1 to 5, where 1 is “not at all interested” and 5 is “extremely interested.” These results are shown in Table 24. While few activities earned ratings past the mid-point (3.0), the two activities that were ranked most highly were Attending a music concert/festival (3.4 mean) and Attending a theater performance/play (3.0 mean). Next in importance were Hiking/walking trails and Historical walking tour (both with mean of 2.9). Rounding out the top five activities was Antique shopping (2.7 mean). At the other extreme, Motorcycle tours, Youth sporting events and Hunting were the least popular activities. See the full results in Table 24.

Table 24. Tell us how interested you are in participating in the following activities in the Wickenburg area

	Not at all Interested	A little Interested	Somewhat Interested	Very Interested	Extremely Interested	Mean
Antique Shopping	22.0%	22.0%	28.3%	21.3%	6.3%	2.7
Art Classes/Workshops	53.2%	15.6%	18.3%	9.2%	3.7%	1.9
Jeep & ATV Tours	49.5%	14.0%	18.7%	13.1%	4.7%	2.1
Wildflower Tour/Outdoor Adventure	32.0%	14.6%	23.3%	22.3%	7.8%	2.6
Attending Art Shows	33.9%	13.9%	20.0%	25.2%	7.0%	2.6
Geocaching	67.0%	9.9%	12.1%	7.7%	3.3%	1.7
Hiking-Walking Trails	23.9%	16.2%	21.4%	24.8%	13.7%	2.9
Youth Sporting Events	79.0%	11.0%	7.0%	2.0%	1.0%	1.4
Touring by Motorcycle	86.0%	7.0%	5.0%	1.0%	1.0%	1.2
Rock Hunting (Hounding)	58.8%	17.6%	9.8%	8.8%	4.9%	1.8
Playing Golf	66.7%	10.5%	9.5%	4.8%	8.6%	1.8
Horseback Riding	44.4%	12.0%	15.7%	14.8%	13.0%	2.4
Historical Walking Tour	21.4%	17.0%	23.2%	25.0%	13.4%	2.9
Picnicking	41.0%	17.0%	23.0%	13.0%	6.0%	2.3
Rodeo/Roping	38.2%	18.6%	17.6%	13.7%	11.8%	2.4
Hunting	82.0%	6.0%	5.0%	2.0%	5.0%	1.4
Attending a Music Concert/Festival	19.4%	8.1%	16.1%	21.8%	34.7%	3.4
Attending a Theatre Performance/Play	26.3%	14.9%	11.4%	29.8%	17.5%	3.0
Attending a Dance Performance	40.0%	19.0%	17.1%	16.2%	7.6%	2.3
Other	36.0%	4.0%	4.0%	24.0%	32.0%	3.1

After rating their interest in this set of activities, visitors were asked whether they planned to participate in those same activities while in Wickenburg. The top five activities they planned to participate in were: Attending a music concert/festival (43.1%); Antique shopping (37.9%); Hiking-walking trails (29.3%); Attending art shows (20.7%); and, Attending a theater performance/play (17.2%). Clearly, one of the primary attractions of Wickenburg is its Del E. Webb Performing Arts Center, which brings a lot of visitors to the community. A significant percentage of respondents (41.4%) also selected “other” as a response to this question, and wrote in a response; these responses are included in Table 26 that follows, but do not represent a departure from the top activities listed here. See Table 25.

Table 25. Did you-Will you participate in the following activities in Wickenburg?

Did or Will you participate in these activities?	Count	Percent
Attending a Music Concert/Festival	25	43.1%
Other	24	41.4%
Antique Shopping	22	37.9%
Hiking-Walking Trails	17	29.3%
Attending Art Shows	12	20.7%
Historical Walking Tour	10	17.2%
Attending a Theatre Performance/Play	10	17.2%
Wildflower Tour/Outdoor Adventure	9	15.5%
Horseback Riding	9	15.5%
Jeep & ATV Tours	6	10.3%
Picnicking	6	10.3%
Rock Hunting (Hounding)	5	8.6%
Playing Golf	5	8.6%
Art Classes/Workshops	4	6.9%
Rodeo/Roping	4	6.9%
Attending a Dance Performance	3	5.2%
Geocaching	2	3.4%
Touring by Motorcycle	2	3.4%
Youth Sporting Events	0	0.0%
Hunting	0	0.0%

Those who provided some “other” response in Table 25, were asked to provide detail on that other activity. These responses are provided in full in Table 26 below.

Table 26. Wickenburg Visitor Study - Other activity in Wickenburg?

	Count	Percent
Parade, Carnival, Main Street Shopping	3	12.5%
Birding	2	8.3%
Anything-Sporty & Artsy-Fartsy!	1	4.2%
Bicycle Riding, Clogging	1	4.2%
Bluegrass	1	4.2%
Desert Caballeros Museum & Visiting Friendly	1	4.2%

	Count	Percent
Residents! Great Little Town.		
Dog Park	1	4.2%
Fly In	1	4.2%
Ghost Towns/Mine Sites	1	4.2%
Gold Nugget Hunting	1	4.2%
Gold Rush Days	1	4.2%
Golf	1	4.2%
Museum	1	4.2%
Paint Ball	1	4.2%
Restaurants, Coffee Shops	1	4.2%
Roping	1	4.2%
Shopping	1	4.2%
Sightseeing, Lunch, Driving Around	1	4.2%
Trade Show	1	4.2%
Visiting Museum	1	4.2%
Vulture Mine	1	4.2%
Total	24	100.0%

A set of specific visitor attractions were provided in the next question and visitors were asked to specify those they planned to visit. The top-rank was earned by Desert Caballeros Western Museum with three-fourths (74%) of respondents indicating they planned to visit this museum. This was followed by the Del E. Webb Center for the Performing Arts, which more than a third (35.3%) said they planned to visit. Third in importance was the Vulture Mine, which more than one-fourth (27.7%) planned to visit on their trip, followed by the Hassayampa River Preserve that one in five (20.8%) planned to visit. See the full list below in Table 27. Some respondents listed “other” attractions, which are specified in Table 28.

Table 27. Plan to visit or visited these attractions in the Wickenburg area?

	Count	Percent
Desert Caballeros Western Museum	128	74.0%
Del E. Webb Center for the Performing Arts	61	35.3%
Vulture Mine	48	27.7%
Hassayampa River Preserve – TNC	36	20.8%
Friends of Music Concerts	20	11.6%
Los Caballeros Golf Club	16	9.2%
Wickenburg Country Club	12	6.9%
Other	11	6.4%

Table 28. Other Wickenburg attractions you plan to visit?

	Count	Percent
Gold Rush Days	2	18.2%
AZ Opera	1	9.1%
Blue Grass Festival	1	9.1%
Bluegrass	1	9.1%
Bluegrass Festival	1	9.1%
Church Community	1	9.1%
Cowboy Christmas Poetry	1	9.1%
Fiddle Fest	1	9.1%
Flying E Ranch	1	9.1%
Robson Camp	1	9.1%
Total	11	100.0%

The Wickenburg Chamber of Commerce had a special interest in finding out which of the community's many special events attract the most visitors to the community. A question was, therefore, added to the survey to elicit this information. As shown in Table 29 below, the Gold Rush Days event held in February received the most responses (49.6%), followed by the Bluegrass Festival in November (47.2%). No other events were even close to these two in the percentage of responses. Much further down the list were the Cowgirl Up event in March (17.1%), the Festival de Septiembre (17.1%), and the Cowboy Christmas Poetry Gathering, which is held in December (11.4%). No direct correlation exists, of course, between these responses and the actual attendance at these events, since each may not have been equally surveyed. See Table 29.

Table 29. Wickenburg Special Events you plan to attend?

	Count	Percent
Gold Rush Days – February	61	49.6%
Bluegrass Festival – November	58	47.2%
Cowgirl Up – March	21	17.1%
Festival de Septiembre – September	21	17.1%
Cowboy Christmas Poetry Gathering – December	14	11.4%
Other	10	8.1%
Bring Christmas Home from Wickenburg – Light Parade – December	9	7.3%
Wickenburg Fly-In & Classic Car Show – October	5	4.1%
3rd of July	4	3.3%
Desert Caballeros Ride – April	2	1.6%
Total	123	100.0%

A number of respondents listed “other” events in Table 29, and these are specified in Table 30 below for the nine respondents who provided them.

Table 30. Other Wickenburg Special Events you plan to attend?

	Count	Percent
Mummenschanz	3	33.3%
Flying E Cowgirl Weekend	2	22.2%
Art Walk/Show	1	11.1%
Concerts	1	11.1%
High School Grad	1	11.1%
Museum	1	11.1%
Total	9	100.0%

The next question asked visitors to rate their tourism experience in Wickenburg according to a scale from 1 to 10, where 1 is “Extremely low satisfaction” and 10 is “Extremely high satisfaction.” Overall, visitors to Wickenburg rated their experiences at a very high mean of 8.7 – this is particularly impressive since we know that Wickenburg gets a very high percentage of return visitors who keep coming back because they are very satisfied with their overall experiences in the community and at the events and activities they attend. See Table 31.

Table 31. What is your overall level of satisfaction with your experience in the Wickenburg?

	1	2	3	4	5	6	7	8	9	10	Mean
Overall satisfaction	0%	.5%	.5%	0%	2.1%	3.7%	8.0%	28.2%	20.7%	36.2%	8.7

1 = Extremely Low level of Satisfaction 10 = Extremely High Level of Satisfaction

The final questions on the Wickenburg visitor survey were concerned with the demographics of those who visit Wickenburg. The first question concerned the gender of visitors. As shown in Table 32 below, more women (58.7%) than men (41.3%) visit Wickenburg, and perhaps in particular its many music concerts, art, cultural and theater performances.

Table 32. Wickenburg Visitor Study - Gender of visitors?

	Count	Percent
Female	108	58.7%
Male	76	41.3%

Visitor age was the next question. The average age of visitors was 60.9 years or age 61 – higher than the average age of 2010 Arizona visitors statewide of 46.8 years. When comparing visitor age by gender, the difference was not significant – average age of women was 60 and the average of men was 61. See Table 33.

Table 33. Age by gender

	Female	Male
	Mean	Mean
Visitor age in years	60	61

The largest cohort of visitors is in the 66 to 70 year age group (25.0%), then the 61 to 65 year age group (21.8%), followed by the 71 to 75 year age group (12.2%). Thus, roughly two-thirds of visitors (65.4%) are over age 60, and only one-third is under age 60. Clearly, the retiree market is the primary visitor demographic in Wickenburg. See Table 34.

Table 34. Age ranges of visitors

	Count	Percent
20 and under	1	.6%
21 - 25 years	2	1.3%
26 - 30 years	1	.6%
31 - 35 years	5	3.2%
36 - 40 years	8	5.1%
41 - 45 years	5	3.2%
46 - 50 years	7	4.5%
51 - 55 years	10	6.4%
56 - 60 years	15	9.6%
61 - 65 years	34	21.8%
66 - 70 years	39	25.0%
71 - 75 years	19	12.2%
76 years and older	10	6.4%
Total	156	100.0%

The average size of the visitor parties who travel to Wickenburg is 2.7 persons (the same size as the 2010 statewide average for all Arizona visitors), although the median number of two persons is probably more accurate (the mean can be driven up by a few large parties, as reflected in the maximum). Thus, most parties consist of one man, one woman and no children, although larger parties will tend to consist of greater numbers of women. See Table 35.

Table 35. Travel Party Size

	Mean	Median	Maximum
Total number of people in your party	2.7	2.0	12.0
Number of women	1.6	1.0	11.0
Number of men	1.3	1.0	6.0
Number of children under 18 years of age	.6	.0	2.0

What is the nature or constitution of the travel parties who visit Wickenburg? More than half of all parties consist of Family members only (52.9%). Much further down, one-fifth of parties consist of Friends only (20.0%), followed by mixed groups of Family and friends (15.3%), then Nobody, traveling alone (11.2%). Only a tiny fraction of those who might have been traveling as part of a tour group (0.6%) were captured in the survey. See Table 36.

Table 36. Who is traveling with you on this trip?

	Count	Percent
Family Only	90	52.9%
Friends Only	34	20.0%
Family and Friends	26	15.3%
Nobody, traveling alone	19	11.2%
Organized Tour Group	1	0.6%
Business Associates	0	0.0%

The average annual income of those who visit Wickenburg is \$77,907 – just slightly higher than the average for 2010 visitors statewide of \$75,610. The largest cohort of visitors was in the \$60,000 to \$79,000 category (22.5%), followed by the \$120,000 and above category (18.6%), then the \$80,000 to \$99,999 category (17.1%). See all data in Table 37.

Table 37. Which of the following categories best describes your annual household income?

	Count	Percent
Less than \$19,999	8	6.2%
\$20,000 to \$39,999	10	7.8%
\$40,000 to \$59,999	21	16.3%
\$60,000 to \$79,999	29	22.5%
\$80,000 to \$99,999	22	17.1%
\$100,000 to \$119,999	15	11.6%
\$120,000 and above	24	18.6%

Weighted average annual income \$77,907

Appendix A

Economic Impact

Introduction

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

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

Economic Impact Analysis Methods

Input-Output (I-O) models are an important tool used in assessing the economic impacts of specific activities. The I-O model incorporates transaction tables to keep track of inter-industry sales and purchases, as well as exogenous sectors of final demand such as households, government, and foreign trade. The name, “I-O Model,” is a result of each industrial sector in the model being both a buyer and a seller of inputs and outputs.

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

Visitors were asked to estimate daily trip expenditures in the categories listed above. The visitors are assumed to be concentrated in the Wickenburg area of Maricopa 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” money to the region. This analysis does not include respondents who live in Maricopa 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.

Thus, direct, indirect, and induced effects of visitor expenditures were calculated for Maricopa County. 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 Maricopa County were not necessarily manufactured within the county (e.g. gasoline, souvenirs, etc.). By margining commodities, producer and

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

Indirect effects are a measure of economic activity in other industrial sectors that is spurred by the direct effects. For example, Wickenburg 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 and indirect effects. Staying with the previous example, a portion of wages earned by workers in the food/beverage and lodging sectors are then locally re-spent in other industrial sectors. IMPLAN uses Personal Consumption Expenditures (PCEs) to model induced effects. PCEs provide estimates of consumer expenditures on goods and services by different income classes (IMPLAN Analysis Guide, 1999).

Regional Expenditure Results

For the economic analysis, each survey represents a travel party. Expenditure questions asked respondents to estimate their expenditures for the travel party, i.e., each survey comprised one group or party. To estimate the number of visitors to the Wickenburg area a population estimate was developed to use in expanding per-party expenditures to all potential visitors to the Wickenburg area. It is estimated that approximately 279,640 people visited the Wickenburg area during the period of the survey. This estimate is derived from attractions visitation (museums, concert facilities, visitor center), lodging supply (hotels and time share properties) as well as average occupancy, and attendance at private attractions and visitation to secondary attractions. The population estimate, however, is still relatively conservative as traffic volumes were not used for any visitor segments. The researchers, however, prefer to err on the side of conservative population estimates.

As discussed previously only out-of-region visitors are included in this analysis. Therefore, only these 279,640 out-of-region visitors are included in the economic impact analysis. The median was used for all expenditure data in the calculation of economic impact. The median or the point which divides a sample was used as this avoids extremes at either end of a frequency distribution. This reduces the extreme end of the range lessening the impact of those who had no expenses as well as those who listed expenses that were in error or considered unreasonable (i.e., \$3,000 for lodging for 1 night in Wickenburg).

To begin with the population estimate of 279,640 is apportioned between day and overnight visitors. This yields 176,615 day visitors, and 103,025 overnight visitors. These numbers will be used to develop the total expenditures for each visitor type. Table A1, illustrates the first steps in developing the total expenditures by spending category. In column one, per-party, per-day expenditures are listed; as can be seen, day visitors do not have any lodging expenditures so that the value per-person per-day is \$0. The next column is the per-person, per-day visitor expenditures which is calculated by dividing the average

party size (2.0 for day visitors and 2.0 for overnight visitors) by the per-party expenditures. This is a necessary step as the population estimate is measured as visitors, and the expenditures need to be in per-person expenditures. The final column in Table A1 for day visitors is the percentage of visitors with expenditures in any specific category, for example 62% of day visitors have restaurant and grocery expenditures. The percentage with expenditures column will be used to adjust the population estimate to reflect that percentage of the visitor population who had valid expenditures in any category. Overnight visitors' per-person expenditures and percentages of the population with expenditures are derived in a similar manner. See Table A1.

Table A1. Estimate of per person per day expenditures for day and overnight Wickenburg area visitors.

	Day Visitors			Overnight visitors		
	Per-party exp	Per-person exp	Percent with exp	Per-Party exp	Per-Person exp	Percent with exp
Lodging-Camping	\$0	\$0	0%	\$101	\$51	62%
Restaurant & Grocery	\$25	\$13	62%	\$50	\$25	67%
Transportation (including gas)	\$20	\$10	39%	\$48	\$24	56%
Shopping/Arts/Antiques	\$35	\$18	38%	\$48	\$24	50%
Recreation/Tour/Event Ticket Fees	\$24	\$12	52%	\$24	\$12	42%
Other	\$20	\$10	4%	\$20	\$10	5%

Table A2 illustrates total visitor expenditures by each specific expenditure category. Per-person expenditures in column one are from column 2 and 5 of Table A1. The population estimate in the next column is calculated by multiplying the percentage of those with expenditures, 62 percent in the example of restaurant and grocery expenditures by the day visitor population estimate (176,615) to yield a population estimate of 110,022. Finally the expenditures are derived by multiplying the population estimate by per-person per-day expenditures from column one. Overnight visitor expenditures are calculated in a similar manner. Finally, total expenditures are arrived at by summing day and overnight visitors' expenditures. The total expenditures listed in the last column were used for the subsequent economic impact analysis.

Table A2. Estimate of total expenditures for day and overnight Wickenburg area visitors

	Day Visitors			Overnight visitors			Total
	Per-Person exp	Pop Estimate	Expenditures	Per-Person exp	Pop Estimate	Expenditures	
Lodging-Camping	\$0.0	-	\$0	\$50.5	63,400	\$3,201,708	\$3,201,708
Restaurant & Grocery	\$12.5	110,022	\$1,375,279	\$25.0	68,684	\$1,717,088	\$3,092,366
Transportation (including gas)	\$10.0	68,040	\$680,401	\$24.0	58,117	\$1,394,804	\$2,075,205
Shopping/Arts/Antiques	\$17.5	66,592	\$1,165,368	\$24.0	51,072	\$1,225,736	\$2,391,104
Rec/Tour/Event Ticket Fees	\$12.0	91,203	\$1,094,432	\$12.0	43,147	\$517,768	\$1,612,200
Other	\$10.0	7,238	\$72,383	\$10.0	5,283	\$52,833	\$125,217
			\$4,387,863			\$8,109,937	\$12,497,800

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 #413 “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 #326 “Gasoline Stations” (85%) and to sector #414 “Automotive Repair and Maintenance” (15%).

Regional Economic Impact Analysis Results

The total number of out-of-region visitors to the Wickenburg area in the study period was estimated at 279,640 visitors. These visitors were responsible for some \$16.6 million of expenditures in Maricopa County, AZ, with an average regional expenditure of \$209 per party. Expenditures recorded for each industrial category were entered into IMPLAN’s impact analysis.

Table A3 shows the direct, indirect, and induced effects of regional expenditures made by non-local visitors. Type SAM multipliers are presented for each of the economic impact categories. Type SAM multipliers are similar to Type III multipliers in that they represent the ratio of total effects to direct effects and include indirect and induced effects. They are also similar in incorporating employment-based Personal Consumption Expenditures (PCEs) to model overall induced effects. IMPLAN’s Type SAM multipliers differ from traditional multipliers because IMPLAN uses all social accounting matrix information to generate a model that captures the inter-institutional transfers (IMPLAN Analysis Guide, 1999).

Table A3. Effects and Multipliers of \$9.3 million of Regional Expenditures by Wickenburg area visitors

Impact Type	Direct Effect	Indirect Effect	Induced Effect	Multiplier	Total Effect
Output	\$9,348,756	\$3,538,304	\$3,677,413	1.77	\$16,564,473
Employment	109	24	28	1.47	160
Labor Income	\$3,122,449	\$1,148,740	\$1,193,888	1.75	\$5,465,076
Tax	\$1,473,303	\$459,643	\$538,326		\$2,471,272

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 A3, visitors to the Wickenburg area spurred an additional \$2.7 million of tax revenue for Maricopa County. Much of this money is re-invested into infrastructure and community needs that further support tourism and recreation industries. The majority of tax revenue coming from Wickenburg 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 2010-2011 visitors to Wickenburg injected significant output to businesses in the regional economy of Maricopa County. Approximately \$9.3 million of regional purchases were made by out-of-region visitors, contributing to a total economic output of \$16.6 million for Maricopa County. This economic activity supported some 160 full-time equivalent (FTE) jobs and tax revenue of \$2.47 million. The total economic impact of visitors to the Wickenburg area is therefore substantial, and contributes significantly to the greater regional economy.

Appendix B
Survey Instrument

WICKENBURG VISITOR STUDY

Hello! Welcome to Wickenburg. We appreciate your time in contributing to our visitor survey. Please complete and return it to the surveyor. Your responses will be anonymous, reported only in aggregate, and not identified with any individual. Thank you!

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

1. How did you hear about Wickenburg? Mark all that apply.

<input type="radio"/> Newspaper	<input type="radio"/> Radio	<input type="radio"/> Online/Website	<input type="radio"/> Word-of-mouth	<input type="radio"/> Other, list: <input style="width: 100px;" type="text"/>
<input type="radio"/> Magazine	<input type="radio"/> TV	<input type="radio"/> Social Networking Sites	<input type="radio"/> Been here before	

2. Is Wickenburg the primary destination of your trip?

Yes No If not, what location is the primary destination of your trip?
3. Do you plan to visit any of the following communities on this trip? Mark all that apply.

Congress Las Vegas Phoenix Metro Prescott Sedona Yarnell Other:
4. Indicate the primary purpose(s) of your current visit to the area. Mark all that apply.

<input type="radio"/> Just Passing Through	<input type="radio"/> Vacation/Leisure	<input type="radio"/> Climate
<input type="radio"/> Day Trip	<input type="radio"/> Business Travel	<input type="radio"/> Relocation
<input type="radio"/> Weekend Visit	<input type="radio"/> Visiting Friends and/or Relatives	<input type="radio"/> Other, define: <input style="width: 150px;" type="text"/>
5. Indicate your primary mode of transportation to Wickenburg.

<input type="radio"/> Private auto	<input type="radio"/> RV/Camper	<input type="radio"/> Tour bus	<input type="radio"/> Fly In-Wickenburg Airport
<input type="radio"/> Rental car	<input type="radio"/> Motorcycle	<input type="radio"/> Valley Metro-Wickenburg Connection	<input type="radio"/> Other, define: <input style="width: 100px;" type="text"/>
6. How much time, in total, will you spend in Wickenburg on this trip?

Choose either day trip or overnight trip and fill in the length of time in whole numbers with NO decimal places.
 (Example: 1 not 1.0)

If a day trip only, how many hours:

If staying overnight, how many nights:
7. Including this trip, how many times (total) have you visited Wickenburg?
8. If staying overnight in Wickenburg, what type of lodging are you using? Mark all that apply. (Leave blank if staying elsewhere)

<input type="radio"/> Hotel/Motel	<input type="radio"/> Second Home	<input type="radio"/> Campground	<input type="radio"/> B&B/Casitas
<input type="radio"/> Home of Friends/Family	<input type="radio"/> RV Park	<input type="radio"/> Guest/Dude Ranch	<input type="radio"/> Other, define: <input style="width: 100px;" type="text"/>

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

In what City did you spend last night?

In what City will you stay tonight?
9. 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:
10. Please estimate as closely as possible the amount of money that your travel party is spending per DAY in Wickenburg for the following categories in U.S. dollars with NO decimal places. (Example 92 not 92.00) Do NOT include expenditures for Phoenix metro area locations.

First, please tell us the number of people these expenses cover. <input style="width: 20px;" type="text"/> <input style="width: 20px;" type="text"/>	Shopping/Art/Antiques	\$	<input style="width: 20px;" type="text"/> <input style="width: 20px;" type="text"/> <input style="width: 20px;" type="text"/> <input style="width: 20px;" type="text"/>
Lodging/Camping	\$	<input style="width: 20px;" type="text"/> <input style="width: 20px;" type="text"/> <input style="width: 20px;" type="text"/> <input style="width: 20px;" type="text"/>	Recreation/Tour / Event Ticket Fees
Restaurant & Grocery	\$	<input style="width: 20px;" type="text"/> <input style="width: 20px;" type="text"/> <input style="width: 20px;" type="text"/> <input style="width: 20px;" type="text"/>	Other
Transportation (incl gas)	\$	<input style="width: 20px;" type="text"/> <input style="width: 20px;" type="text"/> <input style="width: 20px;" type="text"/> <input style="width: 20px;" type="text"/>	Define Other: <input style="width: 150px;" type="text"/>

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11. First tell us how interested you are in participating in the following activities, then indicate those activities you have or will participate in. Do not include events/activities in the Phoenix Metro Area.

	Interest Level:					Did/Will you participate?
	Not at all	A little	Some-what	Very	Extremely	
Antique Shopping	<input type="radio"/>					
Art Classes/Workshops.....	<input type="radio"/>					
Jeep & ATV Tours	<input type="radio"/>					
Wildflower Tour/Outdoor Adventure ...	<input type="radio"/>					
Attending Art Show	<input type="radio"/>					
Geocaching	<input type="radio"/>					
Hiking/Walking Trails	<input type="radio"/>					
Youth Sporting Events.....	<input type="radio"/>					
Touring by Motorcycle	<input type="radio"/>					
Rock Hunting (Hounding)	<input type="radio"/>					
Playing Golf	<input type="radio"/>					
Horseback Riding.....	<input type="radio"/>					
Historical Walking Tour	<input type="radio"/>					
Picnicking	<input type="radio"/>					
Rodeo/Roping	<input type="radio"/>					
Hunting	<input type="radio"/>					
Attending a Music Concert/Festival	<input type="radio"/>					
Attending a Theatre Performance/Play...	<input type="radio"/>					
Attending a Dance Performance	<input type="radio"/>					
Other activity	<input type="radio"/>					
Define here:						

12. Please mark those attractions you have visited or plan to visit in the area.

- Del E. Webb Center for the Performing Arts
- Hassayampa River Preserve-TNC
- Wickenburg Country Club
- Desert Caballeros Western Museum
- Los Caballeros Golf Club
- Other, list:
- Friends of Music Concerts
- Vulture Mine

13. Please mark the following Wickenburg special events you have attended or plan to attend in 2010/2011.

- Wickenburg Fly-In & Classic Car Show-Oct
- Cowgirl Up-March
- Bluegrass Festival-Nov
- Desert Caballeros Ride-April
- Cowboy Christmas Poetry Gathering-Dec
- 3rd of July
- Bring Christmas Home from Wickenburg-Light Parade-Dec
- Fiesta de Septiembre-Sept
- Gold Rush Days-Feb
- Other, list:

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

1	2	3	4	5	6	7	8	9	10
<input type="radio"/>									

Please describe your experience in a few words.

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

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

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

Total number of people: Number of: Women Men Children under 18

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

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

- Less than \$19,999
- \$40,000 to \$59,999
- \$80,000 to \$99,999
- \$120,000 and above
- \$20,000 to \$39,999
- \$60,000 to \$79,999
- \$100,000 to \$119,999

Thank You For Taking The Time To Complete The Survey.

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Appendix C

Open-ended Responses

Please describe your experience in a few words

Always Happy To Visit
Beautiful Event-Great History
Beautiful Town
Beautiful Town, Streetscapes & Audio History Exhibits. Wonderful, Friendly Helpful People Great
Better Selection Of Restaurants Might Help. In General Food Was Ok In Most Places But
Nothing In Downtown Was Outstanding
Charming Relaxed Small Desert Town
Charming/Will Return
DCW Museum Great-Exceeded Expectation
Economy Down-Love To See More "Non-Western" Stores
Enjoyable
Entertaining
Entertaining & Informational
Excellent
Excellent
Excellent
Extremely Friendly People & Amazing Scenery
Fabouless
Family Vacation Relaxing
Friendly People
Friendly People Fun Times
Friendly Town, Lot To Do
Fun
Fun
Fun Walking Tour/Awesome Museum
Fun Western Adventure Relaxing
Fun, Quiet, Small Town Fun
Good
Great
Great At The Flying E Dude Ranch
Great Get-Away From Phoenix!
Great Museum-Our 1st Stop!
Great Small Town-Friendly
Great To See Family, Relax & Rejuvenate
Great Weather, People And Horses!
Had A Great Time
Have Always Loved It Here.
Historically Interesting
Hot, Nice Museum
I Enjoy Old Stuff
I Love It Here!
Informative, Entertaining & Very Enjoyable
Just Arrived
Just Arrived
Just Got Here So I Can't Rate It

Love The Museum
Loved Old Time People Friendly
Loved The History
Loved The Museum-With Friends From Surprise
Lovely And Authentic
Museum Tours And Lunch In Town. Great Guide!
My Favorite Place After Home
Need Another Restaurant
Nice AZ Cowboy Town Attraction
Nice Old Town
Nice Town
OK
People Are Very Friendly
Pleasant
Pleasant, Would Like To See More Activity In Town
Remembering The 1940's & Relaxation 2000's
Small Town Feel-City Amenities
Staying Warm & Playing
Surprised At Old West Atmosphere
Take Out-Of-Towners. Wish There Were More Stores. Round About Detrimental To Possible Visitors.
The Flying E Ranch Far Surpassed My Expectations And Hopefully Will Be Back.
Unique And Beautiful Town
Very Educational
Very Enjoyable
Very Family Oriented. I Felt Very Safe.
Very Friendly People, Great Museum
Very Friendly, Easy For Visitors To Enjoy
Very Good
Very Informative
Very Nice
Very Nice Little Town
Very Nice Museum & Art Show
Very Nice Town
Very Nice Town, Love Shopping
Very Quaint Atmosphere
We Just Love Wickenburg
We Love The Flying E!
We Will Return-Wonderful Experience Am Considering Sale Of Florida Home & Buying Here!
Western Museum-Great Displays, Informative And Entertaining.
Wickenburg Has Always Been A Favorite Place Of Mine Since The Late 1960's
Wonderful
Wonderful Community
Wonderful Except I Was Told There Was Nothing At Vulture Mine-And That's Not The Case.
Wonderful!!
Would Be Higher But Too Hot.
Would Like To Spend More Time