



**NORTHERN ARIZONA
UNIVERSITY**
The W. A. Franke College of Business

Winslow-Holbrook Area Visitor Study



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The AHRRC team:

Cheryl Cothran, AHRRC Director
Thomas Combrink, Senior Research Specialist
Melinda Bradford, Research Specialist

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Executive Summary

This survey of visitors to the Winslow-Holbrook area of northern 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 500 surveys from visitors to the Winslow-Holbrook area over a 12-month period from January through December 2012 – a sufficient sample to produce confidence in these results. This information will assist tourism professionals in the Winslow-Holbrook area with targeted marketing efforts, product development, and advocacy for an industry that is critical to the health of the region.

The general profile of Winslow-Holbrook visitors is middle-aged and older travelers on overnight trips, who are traveling along I-40 in Northern Arizona; many have previously visited the area and are attracted to its historic and natural attractions. Over a quarter are from Arizona, mostly the Phoenix, area with 41 other states represented in the sample; more women than men completed the surveys.

A summary of the specific findings of the Winslow-Holbrook visitor survey follows:

- The primary way people knew about Winslow-Holbrook was that they had been there before, followed by recommendations from friends and family to visit, then by the Internet or online sources. Nearly a third also listed some other specific source.
- For one-fourth of visitors (27.3%) Winslow-Holbrook was the primary destination of their trip, while three-fourths were passing through to somewhere else (72.7%). Those passing through were most likely headed to the Grand Canyon, western states in general, and the Navajo and Hopi nations.
- Winslow led the list of communities visited on this trip (65.5%), followed by Flagstaff (41.0%), Holbrook (37.7%), Petrified Forest National Park (35.6%), Grand Canyon National Park (31.6%), and New Mexico (27.8%).
- The primary reasons people visit the Winslow-Holbrook area are for leisure vacations (46.5%) and just passing through (34.5%); followed by interest in Route 66 (16.8%), visiting friends and relatives (9.9%), and either day trips (9.1%) or weekend visits (9.1%).
- Visitors travel almost entirely by automobile – two-thirds (65.1%) by private auto, one-fourth (22.2%) by rental car and one-tenth in an RV/Camper (9.6%).
- Those in the Winslow-Holbrook area on day visits represented about one-fourth of the sample (28.5%), while the remainder (71.5%) stayed overnight. Day-trippers spent an average of four (4) hours in Winslow-Holbrook, while overnight visitors stayed an average of two (2) nights.
- Four-fifths of overnight visitors (81.6%) stayed in hotel/motels, 6.1% stayed in RV parks, 5.6% in campgrounds, and 4.5% in the homes of family or friends.
- Travel patterns indicate that most survey respondents spent the “night before” completing the survey in Winslow (25.1%), followed by Holbrook (6.9%), Flagstaff (6.4%), and Albuquerque (6.4%). They planned to spend “tonight” in Winslow (39.2%), then Holbrook (17.0%), Flagstaff (6.9%) and Phoenix (4.8%).
- Where are visitors from? About one-fourth are Arizona residents (28.3%), followed by Californians (11%). Next are visitors from: Wisconsin (7.4%), New Mexico (6.0%) and Colorado (4.5%). In all, visitors from 42 states were captured in the survey sample.

- Within Arizona resident visitors, about half (46.2%) are from the Greater Phoenix area or Phoenix MSA (metropolitan statistical area), while 11.8% are from Tucson.
- Foreign visitors represented about one in eight visitors (13.6% of the sample). The largest cohorts were from the United Kingdom (28.8%) and Canada (21.2%).
- Visitors were most interested in several activities: Visiting National and State Parks (4.1 mean using a 1 to 5 scale), Scenic drives (4.0 mean), Cultural or Historic Buildings (3.8 mean), Visiting Museums (3.6 mean), Route 66 (3.5 mean), and Hiking/walking trails (3.4 mean).
- This interest translated into actual visits to these top-5 activities: Visiting National and State Parks (61.5%); Scenic Drives (59.0%); Visiting Cultural and Historic Buildings (52.8%); Visiting Museums (52.8%); and, the “Standing on the Corner” photo opportunity (52.8%).
- The most-visited specific attractions were: La Posada Hotel (57.6%), Downtown Winslow (50.3%), Standing on the Corner Park (45.7%) and the Petrified Forest/Painted Desert National Park (43.0%).
- Measured on a scale from one to 10 (where 10 is high), Winslow-Holbrook visitors rated their experiences at a high mean of 8.5. Winslow-Holbrook area visitors are quite satisfied with their overall experiences and the specific events and activities they attend.
- Average party size for Winslow-Holbrook is 2.9 persons (slightly higher than the 2011 Arizona average of 2.7 persons).
- Party composition finds that people were traveling mostly with Family members (61.0%), followed by Friends only (17.0%), Family and friends (13.7%), and those Traveling alone (6.3%).
- Demographically, more women (62.7%) than men (37.3%) completed surveys about their visit to the Winslow-Holbrook area.
- Winslow-Holbrook visitors have an average age of 57 years, older than the average for Arizona generally (47 years); roughly one-third (35.5%) are between the ages of 41 and 50 years, and one-fourth are 65 or older.
- The average annual income of visitors to Winslow-Holbrook is \$75,478 – higher than the average for 2011 visitors statewide of \$74,660.
- What did visitors spend in Winslow-Holbrook? The largest daily mean expenditures were for lodging (\$80/day), followed by restaurants/grocery (\$69/day), transportation (\$47/day), shopping/jewelry/antiques (\$34/day), and recreation/tour/entrance/permit fees (\$10/day).
- Based on the IMPLAN model, direct spending by out-of-region visitors to Winslow-Holbrook totaled \$133.6 million, producing total annual economic output of \$170.7 million for Navajo County. This economic activity supported some 1,836 full-time equivalent (FTE) jobs and federal, state and local tax revenue of \$18.6 million.

Table of Contents

Acknowledgements.....	i
Executive Summary	ii
Table of Contents	iv
List of Tables	v
Introduction.....	1
Research Methods.....	2
Appendix A.....	26
Economic Impact	26
Introduction.....	26
Economic Impact Analysis Methods	26
Regional Expenditure Results.....	27
Regional Economic Impact Analysis Results	29
Discussion	29
Appendix B	30
Survey Instrument.....	30

List of Tables

Table 1: Number of Surveys by Month	3
Table 2: How did you hear about Winslow-Holbrook?	3
Table 3: How did you hear about Winslow-Holbrook? – Other	4
Table 4: Is the Winslow-Holbrook region the primary destination of your trip?	6
Table 5: If the Winslow-Holbrook area is not the primary destination of your trip, what location is?	6
Table 6: Do you plan to visit any of the following communities on this trip?.....	7
Table 7: Other communities you plan to visit on this trip.....	8
Table 8: Primary purpose of your current visit to this area.....	9
Table 9: Other primary purpose of your current visit to this area.....	9
Table 10. Indicate your primary mode of transportation to Winslow-Holbrook	10
Table 11. Other mode of transportation to Winslow-Holbrook	10
Table 12a. How long did you stay in the Winslow-Holbrook area?-Percent.....	11
Table 12b. How long did you stay in the Winslow-Holbrook area?-Mean	11
Table 13. If staying overnight in the Winslow-Holbrook area what type of lodging are you using?	11
Table 14. Winslow-Holbrook Visitor Study - Other lodging you are using?	12
Table 15. In what city did you spend last night?	12
Table 16. In what city will you spend tonight?.....	14
Table 17. What is your state of origin?.....	15
Table 18. Arizona City of origin	16
Table 19a. Foreign vs. Domestic Visitors	16
Table 19b. Country of origin	17
Table 20. Spending per day in Winslow-Holbrook	17
Table 21. Other expenditures in Winslow-Holbrook	18
Table 22. Tell us how interested you are in participating in the following activities in the Winslow-Holbrook area.....	19
Table 23. Did you-Will you participate in the following activities in the Winslow-Holbrook area?	20
Table 24. Winslow-Holbrook Visitor Study - Other activity in Winslow-Holbrook?	20
Table 25. Winslow-Holbrook Visitor Study – Special Events?.....	21
Table 26. Plan to visit or visited these attractions in the Winslow-Holbrook area	22
Table 27. Other Winslow-Holbrook area attractions you plan to visit	22
Table 28. Overall level of satisfaction with your experience in the Winslow-Holbrook area	23
Table 29. Gender of visitors.....	23
Table 30. Age by gender	23
Table 31. Age ranges of visitors	24
Table 32. Travel Party Size.....	24
Table 33. Who is traveling with you on this trip?.....	25
Table 34. Which of the following categories best describes your annual household income?	25
Table A1. Estimate of per person per day expenditures for day and overnight Winslow-Holbrook area visitors.....	28
Table A2. Estimate of total expenditures for day and overnight Winslow-Holbrook area visitors	28
Table A3. Effects and Multipliers of \$133.6 million of Regional	29
Expenditures by Winslow-Holbrook area visitors	29

Winslow-Holbrook 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 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. Market 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 Winslow-Holbrook 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?

The northern Arizona communities of Winslow and Holbrook are located 33 miles apart along the I-40 corridor in Navajo County. Winslow is a town of 9,655 people, and Holbrook has a population of 5,053 according to the 2010 Census. Both communities are defined by their proximity to I-40, the main east-west transportation route across Northern Arizona. Both are also defined by their proximity to the railroad which has played a pivotal role in the growth and decline of area. The region has a rich Native American history, and these communities offer some of the most direct routes to the Hopi Mesas and the Navajo Nation. The area also has a rich cowboy and pioneer heritage and a connection with the Hashknife/Pony Express mail route. Visitors to these communities arrive primarily from I-40 and to a lesser degree from the White Mountains and the Hopi and Navajo reservations. Winslow's unique tourism attractions include antique shopping and walking tours of historic downtown Winslow, the "Standing on the Corner Park," the world renowned La Posada Hotel designed by esteemed architect Mary Jane Colter. Holbrook has a number of unique pioneer sites, including the County Courthouse, the Bucket of Blood Saloon, as well as Petrified Forest National Park and numerous rock and fossil shops. Holbrook is also near the community of Snowflake, whose Latter-Day Saints Temple attracts adherents and visitors to the region.

The information gleaned from this survey forms a picture of tourism in the Winslow-Holbrook area that can shape the tourism planning efforts of this and other Northern Arizona communities, such as Snowflake-Taylor to the south. 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 Winslow-Holbrook tourism leaders to pursue sources of outside funding for tourism promotion and use marketing dollars to further a regional tourism vision.

Research Methods

In 2012 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 Winslow-Holbrook 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 Winslow 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 would “champion” a local effort to 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 Winslow-Holbrook area tourism survey was designed by the professional staff at the AHRRC in conjunction with the AOT research staff and representatives of both communities’ 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., Visitor 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 tourism leaders were invaluable in this process as they 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 500 surveys were collected for the year, providing a 95% confidence level and 4% margin of error for the validity of the results. The remainder of this report presents the survey results for Winslow-Holbrook.

The majority of completed Winslow-Holbrook surveys were collected at the Winslow Chamber of Commerce Visitor Center, the La Posada Hotel, Homolovi State Park, and Joe & Aggies Cafe. Survey collection began in January 2011 and continued monthly through December 2011. The majority of surveys were collected in the busier Spring and Summer months, high season for the area as indicated in the sampling plan although all seasons were captured in the overall, cumulative result. Table 1 shows the number of surveys collected monthly.

Table 1: Number of Surveys by Month

	Count	Percent
January 2011	40	8%
February 2011	45	9%
March 2011	50	10%
April 2011	67	13%
May 2011	70	14%
June 2011	65	13%
July 2011	60	12%
August 2011	40	8%
September 2011	19	4%
October 2011	14	3%
November 2011	20	4%
December 2011	10	2%
Total	500	100%

The first question asked visitors to the region how they heard about the communities. The largest number (29.3%) knew about the Winslow-Holbrook area from sources other than those listed in the survey, such as the Eagles song, the La Posada Hotel and from just passing through. This was followed by those who were familiar because they had been there before (28.2%), then one-fourth (24.5%) who heard via word-of-mouth from friends or relatives. The fourth largest source of information about the community was Online/Website (20.7%). No other source of information accounted for more than one-tenth of respondents. See Tables 2 and 3 for complete results.

Table 2: How did you hear about Winslow-Holbrook?

	Count	Percent
Been here before	135	28.2%
Word-of-Mouth	117	24.5%
Online/Website	99	20.7%
Newspaper	32	6.7%
Route 66 Passport	26	5.4%
Magazine	17	3.6%
TV	16	3.3%
Radio	11	2.3%
Social Networking Site	9	1.9%
Painted Cliffs Welcome Center	7	1.5%
Other, List	140	29.3%
Total	478	100.0%

Table 3: How did you hear about Winslow-Holbrook? – Other.

How did you hear about Winslow-Holbrook – Other 165 Responses Total	How did you hear about Winslow-Holbrook – Other 165 Responses Total
Eagles song (7)	Family history
Friend (4)	Family roots
Map (3)	Flagstaff museum recommended
Song (3)	Former resident
Car broke down (2)	Freeway sign
Drove by (2)	Friend in AZ
Travel (2)	Friends
Yelp (2)	Friends DVD-Mary
1610 am	Friends for 40 yrs
A friend	Friends who have stayed here
A lifetime of interest in area	From our friends
AAA	Garmin
AAA tour book/map & close to Petrified Forest	Google maps
AAA,guidebooks	Google mobile maps
And Eagles song	Guide book for route 66
Ann-mary	Happened to travel through
Arizona archeological & historical society	Husband
Arizona living	Hwy closed 3/18/12 & stayed here & returned on way back
AZ state park handout	Innkeeper in Santa Fe
Book	Interest in railroad
Books	Joe & aggie
Brought by mother and father-in-law	Ken Evans
Bus trip	La Posada
Business	La Posada Hotel
Card brochure	La Posada road map
Celebration centennial	Lifeline mission
Chamber	Live & work in northern NM-AZ region-pass by
Come for La Posada & Turquoise Room	Live here
Drive by	Live in Arizona-look at atlas(road)
Driven by on the way to IA	Live in the White Mtns
Driving by	Local
Driving through	Lonely Planet
Driving through from Las Vegas	Map-Jack's Canyon climbing
Driving through	Map-near Petrified Forest
Driving to Taos NM	Map-time
Drove by numerous times in transit	Map-trip to Show Low
Eagles	Meteor Crater, Petrified Forest
Eagles-cover	Moon Handbook
Family	Motel's advertising

**How did you hear about Winslow-Holbrook – Other
165 Responses Total**

My AAA guide

Nanas @ bison ranch

Native to AZ

No-look nice from outside

On my request to work in area

Parents donated old photo of la posada

Parents have been here before

Part of route 66 trip

Passing by on street

Passing through

Passing through AZ, AAA catalog

Passing thru

Petrified Forest

Petrified Forest NP

Petrified Forest rangers

Photo book

Printed literature in rack at La Posada

Professor at ASU

Rack card @ La Posada

Radio & highway signs

Raised here

Rec. Of speaker @ Sedona summit

Reside here (Winslow)

Road food

Road I wanted to drive

Road sign

Roadfood.com

Room saver

Rough guide travel book

Route 66 association book-EZ 66 Guide

Route 66 guidebook

Route 66 map book

Route 66 nostalgia

Route 66-guidebook

Route 66-Tom Snyder

Route to Durango

RV-Meteor Crater

**How did you hear about Winslow-Holbrook – Other
165 Responses Total**

Saw from road

Saw in Winslow

Saw it driving thru town last year

Saw Petrified Forest on map

Shown on car GPS

Song "Take it Easy"

Speaker in Tucson

State park brochure

State park brochure & state map

Staying @ ok campground

Sunset magazine

Take the route 66 drive

The Eagle's song

The Eagles

The Eagles song

The song! Map

Tour book

Tour books

Tourist book

Traveling through

Traveling thru

Trip advisor

Trip advisor for restaurant

Triple A

UK TV show

Use to live here

V Bar V ruins (info)

Vacation/relatives

Visitor information center

Walk-by

Walk-in

Walked by

Walking past take it easy display

The next question addressed whether or not the Winslow-Holbrook region was the primary destination of those visitors surveyed. For almost three-fourths (72.7%) the region was *not* the primary destination of their trip; they were passing through to somewhere else. The remaining fourth were primarily visiting the region (27.3%). See Table 4.

Table 4: Is the Winslow-Holbrook region the primary destination of your trip?

	Count	Percent
Yes	132	27.3%
No	351	72.7%
Total	483	100.0%

If the Winslow-Holbrook area was not the primary destination of the trip, respondents were asked to specify where they were heading. Only a small percentage of those who indicated they were traveling elsewhere (11%) provided the information. The location of Winslow-Holbrook adjacent to I-40 bringing people with very varied itineraries was likely a variable. Results for those that did respond are shown in Table 5.

Table 5: If the Winslow-Holbrook area is not the primary destination of your trip, what location is?

Other Primary Destination 54 Responses Total	Other Primary Destination 54 Responses Total
La Posada (3)	La Posada & Turquoise Room
3 day road trip	La Posada trip
4 day motorcycle trip start/stop Flagstaff	Live here
5 week trip all in AZ	Live in Peoria
Around the world trip-2 mths in states	Making our way to Alaska
Brigham reunion	Meeting friends halfway and visiting ranch
Came to escape cold & got snowed in!:))	Meeting half way to see family
Carlsbad Caverns	Meteor Crater visit
Celebrating & revisiting 10 yr anniversary-was here on honeymoon	Ministry
Celebrating 41st anniversary	Mission trip to Navajo Nation
Celebration for Brigham City	Music camp in mesa
Check out my old stomping ground	National Parks
Conference in Salt Lake City UT	Painted Desert
Dark sky astronomy	Picking up broken down car
Family member was Harvey girl 1930's	Professional course
Funeral	Rail fan
Genealogy research	Research
Grand canyon	Returning home
Home	Road trip
Homolovi SP	Rock Art & Ruins
Hope for rain	RV repair
Hopi bean dance	Snow bird!
Joe & Aggies	Spend time at La Posada

Other Primary Destination
54 Responses Total
Stopped to eat
To hear the "Old trails to Winslow" presentation
To stay at the Wigwam & eat at Joe & Aggies

Other Primary Destination
54 Responses Total
Visit and see my father-in-laws mother's birthplace
Visiting old haunts
Watching Olympics on cable TV at campground

Next, respondents were asked which of a number of other communities they also visited on the trip. As shown in Table 6, the most popular was Winslow (65.5%), followed by Flagstaff (41.0%), Holbrook (37.7%), Petrified Forest National Park (35.6%), and Grand Canyon National Park (31.6%). Other places of high interest were New Mexico (27.8%), Sedona (26.6%) and the Phoenix area (20.7%). No others accounted for more than 15 percent of responses. Few visitors were going to the White Mountains, Navajo Nation or the Hopi Tribe. See Table 6.

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

	Count	Percent
Winslow	313	65.5%
Flagstaff	196	41.0%
Holbrook	180	37.7%
Petrified Forest National Park	170	35.6%
Grand Canyon National Park	151	31.6%
New Mexico	133	27.8%
Sedona	127	26.6%
Phoenix Area	99	20.7%
The Navajo Nation	61	12.8%
The Hopi Tribe	49	10.3%
Chinle/Canyon De Chelly	47	9.8%
Snowflake/Taylor	21	4.4%
White Mountains Region	19	4.0%
Window Rock	12	2.5%
Other	71	14.9%
Total	478	100.0%

A number of "other" communities (14.9%) were also listed in Table 6 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

Other Communities 81 Responses Total
AA meeting, saw a sign last time through here
Albuquerque
Been to all
Bisbee to Colo for grad
Brigham City AZ
Came in the train
Camp Verde & Blue Ridge (Happy Jack)
Canyonlands, Arches
Catalina SP/Portal area
Clint's Well, Meteor Crater
Colorado
Concho
Cottonwood/Jerome
Crater
East coast up to Maine
Gallup Zuni
Homolovi ruins SP
Homolovi SP
Homolovi SP, Rock Art Ranch
Honolulu, Lahaina etc
Hubbell Trading Post-Meteor Crater
Jerome (2)
Jerome, Cottonwood
Jerome, Prescott
Jerome, Camp Verde
Joseph City
Kingman
Las Vegas
Lake Havasu
Lake Havasu city
Leupp & Bird Springs
Live in Cottonwood
Meteor Crater (6)
Monument Valley (4)
Monument Valley, Mesa Verde
Monument Valley, Moab
Monument Valley, Page/Lake Powell, Death Valley

Other Communities 81 Responses Total
None-just driving
None, passing thru
OK City, Memphis
On train
Organ Pipe Monument, Payson, Globe, Roosevelt Lake, Tonto Monument, Williams, Oatman, Seligman
Page
Painted Desert
Passing through
Patagonia SP
Payson (2)
Phoenix
Prescott
Rock Art Ranch
Route 66 drive
Route 191
Salt River
San Diego
San Francisco, Las Vegas, Yosemite, Death Valley, Sequoia
Santa Monica
Springerville
Taliesin West
Tombstone, Tucson
Tucson (3)
Tucson & Tombstone
Tucson, Saguaro NP, Organ Pipe Cactus Nat'l Monument
Tucson/Yuma
Utah
Walnut Canyon
We'll be back to visit
Williams
Yuma
Zion

Respondents were asked to characterize the primary purpose of their visit to the Winslow-Holbrook area. Almost half of all visitors indicated that the primary purpose was “Vacation – Leisure” (46.5%), followed closely by Just passing through (34.5%). Next, were those driving Route 66 (16.8%), those Visiting Friends/Relatives (9.9%), followed by Other (9.3%), and those on a Day Trip or a Weekend Visit (9.1% each). Business Travel (5.3%), Climate relief (4.3%) and Relocation (1.0%), complete the responses. See Table 8.

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

	Count	Percent
Vacation/Leisure	229	46.5%
Just passing through	170	34.5%
Route 66	83	16.8%
Visiting Friends and/or Relatives	49	9.9%
Day trip	45	9.1%
Weekend visit	45	9.1%
Business Travel	26	5.3%
Climate	21	4.3%
Relocation	5	1.0%
Other	46	9.3%
Total	493	100.0%

Those who selected some “other” reason for their visit were there, for example, to eat at Joe & Aggies, visit La Posada, attend meetings, or visit historic sites. See all responses for other in Table 9.

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

Other Primary Purpose 54 Responses Total	Other Primary Purpose 54 Responses Total
3 day road trip	Genealogy research
4 day motorcycle trip start/stop Flagstaff	Grand canyon
5 week trip all in AZ	Home
Around the world trip-2 mths in states	Homolovi SP
Brigham reunion	Hope for rain
Came to escape cold & got snowed in!:))	Hopi bean dance
Carlsbad Caverns	Joe & Aggies
Celebrating & revisiting 10 yr anniversary-was here on honeymoon	La Posada
Celebrating 41st anniversary	La Posada & Turquoise Room
Celebration for Brigham City	La Posada trip
Check out my old stomping ground	Live here
Conference in Salt Lake City UT	Live in Peoria
Dark sky astronomy	Making our way to Alaska
Family member was Harvey girl 1930's	Meeting friends halfway and visiting ranch
Funeral	Meeting half way to see family

Other Primary Purpose 54 Responses Total
Meteor Crater visit
Ministry
Mission trip to Navajo Nation
Music camp in Mesa
National Parks
Painted Desert
Picking up broken down car
Professional course
Rail fan
Research
Returning home

Other Primary Purpose 54 Responses Total
Road trip
Rock art & ruins
RV repair
Snow bird!
Spend time at La Posada
Stopped to eat
To hear the "Old Trails to Winslow" presentation
To stay at the Wigwam & eat at Joe & aggies
Visit and see my father-in-laws mother's birthplace
Visiting old haunts
Watching Olympics on cable TV at campground

How did visitors travel to the Winslow-Holbrook area? They traveled almost entirely by automobile – mostly by private auto (65.1%), rental car (22.2%), or by RV/Camper (9.6%). Other transport types included AMTRAK (2.8%), motorcycle (1.0%) and tour bus (0.8%). A small percentage listed some “other” travel means (1.8%), ranging from commercial trucking, a bicycle, on foot and a private airplane. See Tables 10 and 11.

Table 10. Indicate your primary mode of transportation to Winslow-Holbrook

	Count	Percent
Private auto	325	65.1%
Rental car	111	22.2%
RV/Camper	48	9.6%
Amtrak	14	2.8%
Motorcycle	5	1.0%
Tour bus	4	0.8%
Other transport	9	1.8%
Total	499	100.0%

Table 11. Other mode of transportation to Winslow-Holbrook

Other Transportation 10 Responses Total
18 wheeler
2 autos
Bicycle
By foot
Car now/RV summer
Jeep (2)
Private airplane
Truck & trailer
With friends car

What was the average length of stay for visitors? Responses requested either number of hours or number of nights spent in the area. For those on day trips (28.5% of the sample), the average number of hours was 4.0 hours and median (or midpoint) hours was 3.0 hours. For those staying overnight in the area (71.5% of the sample), the average number of nights was 2.0 nights, although the median number – probably a more realistic estimate – was 1.0 night. (The mean can be skewed upward by small numbers of people with longer stays.) See Tables 12a and 12b.

Table 12a. How long did you stay in the Winslow-Holbrook area?-Percent

	Count	Percent
Day Trip	142	28.5%
Overnight Trip to Winslow-Holbrook	358	71.5%

Table 12b. How long did you stay in the Winslow-Holbrook area?-Mean

	Mean	Median
If a day trip, how many hours	4.0	3.0
If staying overnight, how many nights?	2.0	1.0

Those spending the night in Winslow or Holbrook were asked to specify the type of lodging they used. Four-fifths (81.6%) stayed in hotel/motels; 6.1% stayed in RV parks; and, 5.6% stayed in campgrounds. Few visitors (4.5%) stayed in the homes of family and friends or used other lodging (4.0%). See Tables 13 and 14.

Table 13. If staying overnight in the Winslow-Holbrook area what type of lodging are you using?

	Count	Percent
Hotel/Motel	306	81.6%
RV Park	23	6.1%
Campground	21	5.6%
Home of Friends or Family	17	4.5%
Other lodging	15	4.0%
B&B	0	0.0%
Total	375	100.0%

Note: Individuals used this comment box to define their hotel and campground stays as well as the intended purpose of “Other” lodging, perhaps wanting to share that they had experienced La Posada, the Wigwam or Homolovi State Park-all icons of the area.

Table 14. Winslow-Holbrook Visitor Study - Other lodging you are using?

Other Lodging 36 Responses Total
Albuquerque NM
Driving through
Flagstaff
Forest department land
Home (2)
Homolovi State Park campground (5)
La Posada Hotel (14)

Other Lodging 36 Responses Total
Wigwam Motel – Holbrook (6)
Mission house
RV or campground in summer
Sleeper in truck
State Park
Walmart parking lot

To help determine the travel patterns of visitors, respondents were asked where they spent “last night.” The largest percentage of visitors stayed in Winslow (25.1%), followed by Holbrook (6.9%), Flagstaff (6.4%), and Albuquerque (6.4%). The complete list represents the wide diversity of travelers who pass through Winslow-Holbrook from near and far reflecting the proximity to the I-40 Interstate system. Arizona communities represented 67 percent of the responses while 33 were from other states or undecided. See Table 15.

Table 15. In what city did you spend last night?

	Count	Percent
Winslow	102	25.1%
Holbrook	28	6.9%
Flagstaff	26	6.4%
Albuquerque NM	26	6.4%
Santa Fe NM	13	3.2%
Grand Canyon National Park	12	2.9%
Tucson	10	2.5%
Phoenix	10	2.5%
Las Vegas NV	9	2.2%
Sedona	7	1.7%
Page	7	1.7%
Gallup NM	7	1.7%
Williams	6	1.5%
Mesa	6	1.5%
Home	6	1.5%
Prescott	5	1.2%
Amarillo TX	5	1.2%
Scottsdale	4	1.0%
Moab UT	4	1.0%
Gilbert	4	1.0%
Chinle	4	1.0%
Palm Springs CA	3	0.7%

	Count	Percent
Homolovi Ruins State Park	3	0.7%
Winslow-Holbrook	2	0.5%
Tuba City	2	0.5%
Tempe	2	0.5%
Show Low	2	0.5%
Pahrump NV	2	0.5%
Monument Valley	2	0.5%
Mexican Hat UT	2	0.5%
Laughlin NV	2	0.5%
Henderson NV	2	0.5%
Guymon OK	2	0.5%
Grants NM	2	0.5%
Farmington NM	2	0.5%
Cottonwood	2	0.5%
Cortez CO	2	0.5%
Chandler	2	0.5%
Yuma	1	0.2%
Wolfforth TX	1	0.2%
Wild Spirit Wolf Sanctuary	1	0.2%
Vista CA	1	0.2%
Vernon	1	0.2%
Vega TX	1	0.2%

	Count	Percent
Tucumcari NM	1	0.2%
Tucson/Marana	1	0.2%
Taos NM	1	0.2%
Sun City West	1	0.2%
St Louis MO	1	0.2%
Springdale UT	1	0.2%
Seligman	1	0.2%
Second Mesa	1	0.2%
Scott City KS	1	0.2%
Sawpit CO	1	0.2%
Santa Rosa State Park	1	0.2%
Santa Ana NM	1	0.2%
Roswell NM	1	0.2%
Rifle CO	1	0.2%
Red Rock	1	0.2%
Pueblo CO	1	0.2%
Pueblo	1	0.2%
Prescott Valley	1	0.2%
Pinetop	1	0.2%
Pine	1	0.2%
Pie Town NM	1	0.2%
Pasadena CA then Winslow	1	0.2%
Parker	1	0.2%
Pagosa Springs CO	1	0.2%
Navajo	1	0.2%
Mormon Lake	1	0.2%
Meteor Crater RV Park	1	0.2%
Mesa Verde CO	1	0.2%
Ludlow CA	1	0.2%
Lubbock TX	1	0.2%
Los Lunas NM	1	0.2%
Los Angeles CA	1	0.2%
Logan NM	1	0.2%
Liberal KS	1	0.2%

	Count	Percent
Liberal Kansas	1	0.2%
Las Cruces NM	1	0.2%
Kingman	1	0.2%
Kayenta	1	0.2%
Houston TX	1	0.2%
Hopi Cultural Center	1	0.2%
Heber	1	0.2%
Guyman OK	1	0.2%
Globe	1	0.2%
Glendale	1	0.2%
Fort Mohave	1	0.2%
Florence (Winter Home)	1	0.2%
Flight	1	0.2%
Eagar	1	0.2%
Durango CO	1	0.2%
Don't Know	1	0.2%
Denver CO	1	0.2%
Dalhart TX	1	0.2%
Coconino National Forest	1	0.2%
Coconino	1	0.2%
Cave Creek	1	0.2%
Catalina	1	0.2%
Bullhead City	1	0.2%
Boulder City NV	1	0.2%
Bayfield CO	1	0.2%
Barstow California	1	0.2%
Anthem	1	0.2%
Amarillo Texas	1	0.2%
Albuquerque & Prescott	1	0.2%
Acoma Sky City NM	1	0.2%
Total	407	100.0%

Respondents were also asked where they plan to “spend tonight,” and these responses are shown in Table 16. Again, Winslow captured the largest cohort (39.2%), followed by Holbrook (17.0%), Flagstaff (6.9%) and Phoenix (4.8%). Thus, in terms of travel patterns, one take-away is the close connection between the I-40 communities of Winslow, Holbrook and Flagstaff. Arizona communities overall represented 86 percent with 14 percent from other states or undecided. See the full list of responses in Table 16.

Table 16. In what city will you spend tonight?

	Count	Percent
Winslow	154	39.2%
Holbrook	67	17.0%
Flagstaff	27	6.9%
Phoenix	19	4.8%
Sedona	13	3.3%
Albuquerque NM	9	2.3%
Santa Fe NM	7	1.8%
Williams	5	1.3%
Tucson	5	1.3%
Homolovi State Park	5	1.3%
Grand Canyon National Park	4	1.0%
Tucumcari NM	3	0.8%
Show Low	3	0.8%
Scottsdale	3	0.8%
Kingman	3	0.8%
Gallup NM	3	0.8%
Don't Know Yet	3	0.8%
San Diego CA	2	0.5%
Not Sure	2	0.5%
Needles CA	2	0.5%
Mesa	2	0.5%
Las Vegas NY	2	0.5%
Home	2	0.5%
Flagstaff Or Williams	2	0.5%
Winslow/Grand Canyon	1	0.3%
Winslow-Homolovi Ruins State Park	1	0.3%
Winslow-Holbrook Area	1	0.3%
Winslow-Holbrook	1	0.3%
Willcox	1	0.3%
Vernon-Home	1	0.3%
Vernon	1	0.3%
Unknown	1	0.3%
Taos NM	1	0.3%
Sierra Vista	1	0.3%
Second Mesa	1	0.3%
Raton NM?	1	0.3%
Queen Creek	1	0.3%
Peach Springs	1	0.3%

	Count	Percent
Payson	1	0.3%
Parker	1	0.3%
Pagosa Springs CO	1	0.3%
Page	1	0.3%
On The Train To L.A.	1	0.3%
On The Road	1	0.3%
New Mexico	1	0.3%
Marble Canyon	1	0.3%
Madrid NM	1	0.3%
Los Angeles CA	1	0.3%
Laughlin NV	1	0.3%
Lake Havasu City	1	0.3%
In Texas Probably	1	0.3%
Homolovi State Park Due To Strong Winds Impeding RV Drive	1	0.3%
Home-Western NM	1	0.3%
Here!	1	0.3%
Grants NM	1	0.3%
Grand Junction CO	1	0.3%
Fayetteville AR	1	0.3%
Colorado Springs CO	1	0.3%
Clarkdale	1	0.3%
Chloride	1	0.3%
Chinle	1	0.3%
Carlsbad NM	1	0.3%
Capistrano Beach CA	1	0.3%
Canyon De Chelly (Spider Rock Campground)	1	0.3%
Blueridge Campground	1	0.3%
Ashfork	1	0.3%
Arizona	1	0.3%
Apache Junction	1	0.3%
Albuquerque NM/Boulder City NV	1	0.3%
Albuquerque & Prescott	1	0.3%
Total	393	100.0%

Where do visitors to the Winslow-Holbrook area come from? As shown below, about one-fourth are Arizona residents (28.3%), followed by those from California (11%). Next in importance are a series of states that typically send visitors to Arizona, including: Wisconsin (7.4%), New Mexico (6.0%), Colorado (4.5%), and Texas (3.3%). In all, visitors from 42 states were captured in the survey sample. See Table 17.

Table 17. What is your state of origin?

	Count	Percent		Count	Percent
Arizona	119	28.3%	Alabama	4	1.0%
California	46	11.0%	Florida	4	1.0%
Wisconsin	31	7.4%	North Carolina	4	1.0%
New Mexico	25	6.0%	Utah	3	0.7%
Colorado	19	4.5%	Wyoming	3	0.7%
Texas	14	3.3%	South Carolina	3	0.7%
Illinois	14	3.3%	New Jersey	3	0.7%
Ohio	10	2.4%	Connecticut	3	0.7%
New York	10	2.4%	Vermont	3	0.7%
Oregon	8	1.9%	New Hampshire	3	0.7%
Washington	7	1.7%	Alaska	2	0.5%
Nevada	7	1.7%	Nebraska	2	0.5%
Oklahoma	7	1.7%	Montana	2	0.5%
Arkansas	7	1.7%	North Dakota	2	0.5%
Michigan	7	1.7%	South Dakota	2	0.5%
Indiana	7	1.7%	Mississippi	2	0.5%
Pennsylvania	6	1.4%	Delaware	2	0.5%
Massachusetts	6	1.4%	Kentucky	1	0.2%
Kansas	5	1.2%	West Virginia	1	0.2%
Iowa	5	1.2%	Maine	1	0.2%
Maryland	5	1.2%	Total	420	100.0%
Virginia	5	1.2%			

In-state resident visitors were asked to specify their Arizona city of origin, and these responses are shown in Table 18. The most important contributors are: Tucson (11.8%), Phoenix (10.1%), Mesa (8.4%), Flagstaff (6.7%), and Chandler (5.0%). However, when all communities in the Greater Phoenix metropolitan area are combined, the total for the Phoenix MSA (metropolitan statistical area) is 46.2%, accounting for almost half of all visitors. See all communities in Table 18.

Table 18. Arizona City of origin

	Count	Percent		Count	Percent
Tucson	14	11.8%	Queen Creek	1	0.8%
Phoenix	12	10.1%	Pinetop	1	0.8%
Mesa	10	8.4%	Pine	1	0.8%
Flagstaff	8	6.7%	Peoria	1	0.8%
Chandler	6	5.0%	Paul Spur	1	0.8%
Scottsdale	5	4.2%	Paradise Valley	1	0.8%
Gilbert	5	4.2%	Page	1	0.8%
Sun City	3	2.5%	Maricopa	1	0.8%
Sun	3	2.5%	Lakeside	1	0.8%
Oro Valley	3	2.5%	Lake Havasu City	1	0.8%
Dilkon	3	2.5%	Kingman	1	0.8%
Tempe	2	1.7%	Keams Canyon	1	0.8%
Prescott	2	1.7%	Joseph City	1	0.8%
Hereford	2	1.7%	Jerome	1	0.8%
Groom Creek	2	1.7%	Guadalupe	1	0.8%
Glendale	2	1.7%	Greenhaven	1	0.8%
Fry	2	1.7%	Fountain Hills	1	0.8%
Cottonwood	2	1.7%	Fort Lowell	1	0.8%
Vernon	1	0.8%	Corona De Tucson - Vail	1	0.8%
Tuba City	1	0.8%	Claypool	1	0.8%
Tolleson	1	0.8%	Clarkdale	1	0.8%
Surprise	1	0.8%	Casa Grande	1	0.8%
Springerville	1	0.8%	Bisbee	1	0.8%
Show Low	1	0.8%	Anthem Desert Hills	1	0.8%
Sedona	1	0.8%	Total	119	100.0%
Second Mesa	1	0.8%			
Rincon	1	0.8%			

About one in eight visitors (13.6%) were of foreign origins. The largest single cohort of foreign visitors was from the United Kingdom (28.8%), followed closely by visitors from Canada (21.2%), then by Australia (9.1%), Switzerland (4.5%) and France (4.5%). A total of 19 countries appear on Table 19b.

Table 19a. Foreign vs. Domestic Visitors

	Count	Percent
Foreign Visitors	66	13.6%
Domestic Visitors	434	86.4%

Table 19b. Country of origin

	Count	Percent		Count	Percent
United Kingdom	19	28.8%	Turkey	1	1.5%
Canada	14	21.2%	Taiwan	1	1.5%
Australia	6	9.1%	Poland	1	1.5%
Switzerland	3	4.5%	Mexico	1	1.5%
France	3	4.5%	Ireland	1	1.5%
Sweden	2	3.0%	Germany	1	1.5%
Spain	2	3.0%	Denmark	1	1.5%
New Zealand	2	3.0%	Canada/New Zealand	1	1.5%
Italy	2	3.0%	Brazil	1	1.5%
Belgium	2	3.0%	Total	66	100.0%
The Netherlands	2	3.0%			

An issue of great 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 per-party expenditures in the key categories of lodging, restaurants/grocery, transportation (including gas), shopping/jewelry/antiques, and recreation/tour/permit fees. These results are shown in Table 20, along with the number of people these expenses cover, or party size, which averages two people (median and mean). The largest daily mean per-party expenditures were for lodging at \$80/day, followed by restaurants/grocery at \$69/day, transportation at \$47/day, shopping/jewelry/antiques at \$34/day, and recreation/tour/permit fees at \$10/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 can play in inflating the average. See Table 20.

Table 20. Spending per day in Winslow-Holbrook

Spending per day	Mean	Median	Maximum	Percent with expenditures
Number of people these expenses cover	2	2	8	
Lodging/Camping	\$80	\$60	\$1,000	62%
Restaurant & Grocery	\$69	\$40	\$2,000	75%
Transportation (including gas)	\$47	\$28	\$4,500	60%
Shopping/Jewelry/Antiques	\$34	\$0	\$1,200	32%
Recreation/Tour/Entrance/Permit Fees	\$10	\$0	\$1,000	26%
Other expenditures	\$7	\$0	\$1,120	4%

A number of visitors also listed “other” expenditures, which are shown in Table 21. 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 21. Other expenditures in Winslow-Holbrook

Other Expenditure
17 Responses Total
Admission fee
Approximately \$250 total (all expenses)
Brought 2 semi loads of gifts to Navajo
Car being fixed, breakfast
Car repairs
Clothing
Gifts
Nic-nacs
Odds & ends glue
Rest/laundry
Showers/laundry
Souvenirs
Speeding ticket
Stuff at Hopi
This is my business!
Walmart

The next question asked visitors to indicate their level of interest in participating in a number of activities in the Winslow-Holbrook 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.” Several activities earned ratings past the mid-point (3.0), and the two highest-ranked activities were Visiting National and State Parks (4.1 mean) and Scenic Drives (4.0 mean). Next in importance were: Visiting Cultural/Historic Buildings (3.8 mean), Visiting Museums (3.6 mean), followed by Route 66 (3.5 mean) and Hiking/Walking (3.4 mean). The “Standing on the Corner” photo opportunity (3.2 mean) and Native American Jewelry/Arts & Crafts (3.0 mean) both earned ratings at or past the mid-point (3.0). At the other extreme, geocaching, motorcycle tours, and hunting were the least popular activities. See the full results in Table 22.

Table 22. Tell us how interested you are in participating in the following activities in the Winslow-Holbrook area

	Not at All interested	A Little Interested	Somewhat Interested	Very Interested	Extremely Interested	Mean
Visiting National and State Parks	4.5%	5.5%	10.2%	38.5%	41.4%	4.1
Scenic Drives	4.7%	5.2%	16.4%	35.7%	38.0%	4.0
Visiting Cultural and Historic Buildings	6.0%	4.4%	24.4%	35.8%	29.5%	3.8
Visiting Museums	6.8%	7.6%	25.4%	35.6%	24.6%	3.6
Route 66	7.9%	13.2%	28.9%	25.9%	24.1%	3.5
Hiking/Walking	12.3%	12.3%	23.7%	30.9%	20.8%	3.4
Standing on the Corner photo opportunity	19.6%	11.6%	22.3%	19.6%	27.0%	3.2
Tribal Arts and Culture	16.7%	14.5%	25.2%	26.3%	17.3%	3.1
Native American Jewelry/Arts & Crafts	15.2%	17.7%	29.6%	22.8%	14.7%	3.0
Outdoor Recreation/Adventure Sports	27.8%	17.8%	20.6%	21.2%	12.6%	2.7
Antique/Pawn Shopping	32.2%	20.4%	24.5%	14.3%	8.5%	2.5
Attending a Special Event	41.2%	18.6%	18.2%	10.8%	11.1%	2.3
Rodeo/Western Activities	42.0%	21.0%	21.0%	8.3%	7.8%	2.2
Camping/RV Stay	62.3%	7.9%	9.6%	10.4%	9.9%	2.0
Geocaching	63.9%	14.3%	11.9%	6.3%	3.6%	1.7
Touring by Motorcycle	80.2%	6.6%	5.7%	4.6%	2.9%	1.4
Hunting	84.8%	6.4%	5.5%	2.0%	1.2%	1.3
Other Activity	52.9%	2.9%	2.9%	5.9%	35.3%	2.7

After rating their interest in this set of activities, visitors were asked whether they actually planned to participate in these activities while in the Winslow-Holbrook region. The top five activities they planned to participate in were: Visiting National or State Parks (61.5%); Scenic Drives (59.0%); Visiting Cultural/Historic Buildings (52.8%); Visiting Museums (52.8%); and, the Standing on the Corner photo opportunity (52.8%). Clearly, one of the primary attractions of the region is national and state parks, along with historic buildings and museums. A small percentage of respondents (2.1%) also selected “other” as a response to this question, and wrote in a response. See Table 23 and Table 24.

Table 23. Did or Will you participate in the following activities in the Winslow-Holbrook area?

Did or Will you participate in these activities	Count	Percent
Visiting National and State Parks	120	61.5%
Scenic Drives	115	59.0%
Visiting Cultural and Historic Buildings	103	52.8%
Visiting Museums	103	52.8%
Standing on the Corner photo opportunity	103	52.8%
Hiking/Walking	101	51.8%
Native American Jewelry/Arts & Crafts	94	48.2%
Route 66	94	48.2%
Tribal Arts and Culture	51	26.2%
Camping/RV Stay	41	21.0%
Antique/Pawn Shopping	35	17.9%
Outdoor Recreation/Adventure Sports	31	15.9%
Attending a Special Event	14	7.2%
Geocaching	13	6.7%
Rodeo/Western Activities	8	4.1%
Participated in Hunting	7	3.6%
Touring by Motorcycle	6	3.1%
Other Activity	4	2.1%
Total	195	100.0%

Table 24. Winslow-Holbrook Visitor Study - Other activity in Winslow-Holbrook?

Other Activity 27 Responses Total	Other Activity 27 Responses Total
66th birthday	Ministry outreach; sharing Jesus
All historical-cultural sites. We can find on a 3 month trip	Motorcycling tour
AZ Centennial Grand Canyon railroad trip	Motorsports
Biking (bicycles)	Parades & standing on corner festival
Dark sky-no light pollution	Rafting Grand Canyon
Demonstrations Navajo cooking	Shopping
Genealogy research	Spiritual activities-Sedona
Just passing through	Staying at historic La Posada brought us to Winslow
Just passing thru-not spending time here	Touring

Other Activity 27 Responses Total
Touring USA in motorhome to CA
Train watching
Visiting because I am doing oral history interviews- contract research
Visiting family (2)

Other Activity 27 Responses Total
Visiting Meteor Crater, Two-Guns, Winslow sites
Visiting relatives
We enjoy La Posada
Wish there were pow- wows in March

Those who provided information on a special event they attended in Table 23 were asked to provide detail on the special event. These responses are provided in full in Table 25 below.

Table 25. Winslow-Holbrook Visitor Study – Special Events?

Special Event 48 Responses Total
Annular eclipse
AZ Centennial in Williams
Baseball game (2)
Celebration for Brigham City
Centennial trail ride
Chili cook-off
Christmas parade
Christmas parade/standing on the corner
Concert (3)
Concert or festival
Concert, festival
Concert, festival
Concerts (5)
Concerts, festivals, seasonal
Concerts, native dance
County fair
Festival (2)
Festival-local flare
Hopi festival in Flagstaff
Hopi tour

Special Event 48 Responses Total
Like concerts
Live music
Local events
Music
Music camp
Native American events
Outdoor concerts
Pow wow
Pow wow?
Rat is back
Rocks
Rodeo
Rodeo, bull riding, cattle auction
Sound & light display in parks or similar
Tribal dances
Visit Hon-Dah Casino
Visiting family
Wedding (2)
Winslow centennial calendar of events

A set of specific visitor attractions was provided in the next question and visitors were asked to specify those they planned to visit. The top rank was earned by the La Posada Hotel in Winslow, visited by more than half (57.6%) of respondents. This was followed by downtown Winslow, visited by half of respondents (50.3%). Third was the "Standing on the Corner" park (45.7%), then Petrified Forest/Painted Desert National Park (43.0%), Meteor Crater (35.0%) and Old Trails Museum (35.0%). See the full list in Table 26. Some respondents listed "other" attractions, which are specified in Table 27.

Table 26. Plan to visit or visited these attractions in the Winslow-Holbrook area

	Count	Percent
La Posada Hotel	260	57.6%
Downtown Winslow	227	50.3%
Standing on The Corner Park	206	45.7%
Petrified Forest/Painted Desert National Park	194	43.0%
Meteor Crater	158	35.0%
Old Trails Museum	158	35.0%
Hubbell Trading Post	129	28.6%
Downtown Holbrook	102	22.6%
Homolovi State Park	90	20.0%
Wigwam Motel	82	18.2%
Holbrook Court House Visitor Center and Museum	62	13.7%
Hopi Mesas	54	12.0%
9-11 Memorial Park	51	11.3%
First Street Pathway	41	9.1%
Peter Toth Monument (Totem)	32	7.1%
Rock Art Ranch	28	6.2%
McHood Park/Clear Creek	25	5.5%
Hashknife/Pony Express	20	4.4%
Snowflake LDS Temple	9	2.0%
Other attraction	22	4.9%
Total	451	100.0%

Table 27. Other Winslow-Holbrook area attractions you plan to visit

Other Attractions 25 Responses Total
Canyon de Chelly (4)
Grand Canyon (2)
Went to Meteor Crater. Did not enter-to expensive
Walnut & Canyon De Chelly
Walmart
Visit my relatives old house
Sedona
Ruins
Route 66
Lowell Observatory
Leupp

Other Attractions 25 Responses Total
Lavender festival
Just passing through this trip
Joe & Aggies
Jo & Aggies restaurant
Jacks Canyon
Jack's Canyon climbing
In past 50 yrs many areas of Winslow/Holbrook
Grand Canyon Walnut Creek
Ganado, Window Rock
All

The next question asked visitors to rate their tourism experience in the Winslow-Holbrook area according to a scale from 1 to 10, where 1 is “Extremely low satisfaction” and 10 is “Extremely high satisfaction.” Overall, visitors to the Winslow-Holbrook region rated their experiences at a high mean of 8.5, which is particularly impressive since we know that the Winslow-Holbrook area gets a very high percentage of pass-through visitors who are very satisfied with their overall experiences in the community even though they are there for a relatively short time. See Table 28.

Table 28. Overall level of satisfaction with your experience in the Winslow-Holbrook area

	1	2	3	4	5	6	7	8	9	10	Mean
Overall satisfaction	0.2%	0%	0%	0.7%	5.4%	4.7%	9.7%	25.3%	18.3%	35.7%	8.5

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

The final questions on the Winslow-Holbrook visitor survey were concerned with visitor demographics, first the gender of visitors. As shown in Table 29, more women (62.7%) than men (37.3%) appear to visit the Winslow-Holbrook region, but it may also reflect the fact that more women completed survey forms.

Table 29. Gender of visitors

	Count	Percent
Female	283	62.7%
Male	168	37.3%

Visitor age was the next question. The average age of visitors was 56.9 years or age 57 – higher than the average age for 2011 Arizona visitors statewide of 47.2 years. When comparing visitor age by gender, there was no difference – the average age of both women and men was 57. See Table 30.

Table 30. Age by gender

	Female	Male
	Mean	Mean
Visitor age in years	57	57

The largest single cohort of visitors was the 46 to 50 year age group (20.4%), followed by the 41 to 45 year age group (15.1%), and the 76 years or older age group (14.3%). Thus, roughly one-third of visitors (35.5%) are between the ages of 41 and 50 years of age, a quarter are 51-60 (26%) and another third are over 60 (32%). Clearly, the area attracts middle aged, boomer and older individuals.. See Table 31.

Table 31. Age ranges of visitors

	Count	Percent
20 and under	0	0.0%
21 - 25 years	0	0.0%
26 - 30 years	5	1.3%
31 - 35 years	2	0.5%
36 - 40 years	19	4.8%
41 - 45 years	59	15.1%
46 - 50 years	80	20.4%
51 - 55 years	51	13.0%
56 - 60 years	51	13.0%
61 - 65 years	30	7.7%
66 - 70 years	29	7.4%
71 - 75 years	10	2.6%
76 years and older	56	14.3%
Total	392	100.0%

The average size of the visitor parties who travel to the Winslow-Holbrook region is 2.9 persons (slightly higher than the 2011 statewide average for Arizona of 2.7 persons), 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 32.

Table 32. Travel Party Size

	Mean	Median	Maximum
Total number of people in your party	2.9	2.0	35.0
Number of women	1.8	1.0	33.0
Number of men	1.2	1.0	5.0
Number of children under 18 years of age	.6	.0	3.0

What is the nature or constitution of the travel parties who visit the region? Almost two-thirds of parties consist of Family members only (61.0%). Much further down, are parties of Friends only (17.0%), mixed groups of Family and friends (13.7%), then those traveling alone (6.3%). Several tour groups were also captured in the sample (0.7%). See Table 33.

Table 33. Who is traveling with you on this trip?

	Count	Percent
Family Only	272	61.0%
Friends Only	76	17.0%
Family and Friends	61	13.7%
Nobody, Traveling alone	28	6.3%
Business Associates	6	1.3%
Organized Tour Group	3	0.7%
Total	446	100.0%

The average annual income of those who visit Winslow-Holbrook is \$75,478 – higher than the 2011 statewide visitor average of \$74,660. The largest cohort of visitors was in the \$60,000 to \$79,000 category (20.7%), followed by the \$40,000 to \$59,999 category (18.6%) and the \$120,000 and above category (18.1%). See all data in Table 34.

Table 34. Which of the following categories best describes your annual household income?

	Count	Percent
Less than \$19,999	21	5.6%
\$20,000 to \$39,999	40	10.6%
\$40,000 to \$59,999	70	18.6%
\$60,000 to \$79,999	78	20.7%
\$80,000 to \$99,999	50	13.3%
\$100,000 to \$119,999	49	13.0%
\$120,000 and above	68	18.1%

Weighted average annual income \$75,478

Appendix A

Economic Impact

Introduction

Question nine in the survey of visitors to Winslow-Holbrook asked respondents to detail their regional expenditures in each of the following categories: lodging, restaurant & grocery, transportation (including gas), shopping/jewelry/antique purchases, recreation/tour/entrance/permit fees, and miscellaneous other expenditures. Understanding the regional economic impacts of visitors can illustrate the economic importance of tourism and recreational activities to the Winslow-Holbrook area, and can be compared to the impacts of other economic sectors.

Expenditures from Winslow-Holbrook area visitors were entered into the Input-Output model Impact analysis for PLANing (IMPLAN) and economic impacts and multiplier effects were calculated for Navajo 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 along I-40 in the Winslow and Holbrook area of Navajo 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 Navajo County as they do not represent “new” output to the region, assuming 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 Navajo 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 Navajo 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, Winslow-Holbrook 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 Winslow-Holbrook area a population estimate was developed to use in expanding per-party expenditures to all potential visitors to the Winslow-Holbrook region. It is estimated that approximately 1,675,500 out-of-region people visited the region during the period of the survey. This estimate is derived from attractions visitation (museums, national and state parks, 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 1,675,500 out-of-region visitors are included in the economic impact analysis. The mean was used for all expenditure data in the calculation of economic impact. The mean can be adversely affected by the extreme ends of the range. Therefore, to lessen the impact of respondents who had extreme values, the data were cleaned to remove outliers or expenses that were not considered to be reasonable (i.e., \$3,000 for lodging for 1 night in Holbrook).

The first step is to apportion the population estimate of 1,675,500 between day and overnight visitors. This yields 477,264 day visitors, and 1,198,236 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, calculated by dividing the average party size (2.0 for day and 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 45.4% 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 Winslow-Holbrook 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	0.0%	\$102	\$51	87.3%
Restaurant & Grocery	\$47	\$23	45.4%	\$75	\$38	88.1%
Transportation (including gas)	\$57	\$29	24.8%	\$44	\$22	74.9%
Shopping/Arts/Antiques	\$20	\$10	8.5%	\$38	\$19	39.5%
Recreation/Tour/Event Ticket Fees	\$3	\$2	7.8%	\$12	\$6	33.1%
Other	\$10	\$5	0.7%	\$6	\$3	5.6%

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, 45.4 percent in the example of restaurant/grocery expenditures, by the day visitor population estimate (477,264) to yield a population estimate of 216,630. 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 Winslow-Holbrook area visitors

	Day Visitors			Overnight visitors			
	Per-Person exp	Pop Estimate	Expenditures	Per-Person exp	Pop Estimate	Expenditures	Total
Lodging-Camping	\$0.0	-	\$0	\$51.2	1,045,918	\$53,498,800	\$53,498,800
Restaurant & Grocery	\$23.4	216,630	\$5,058,400	\$37.5	1,056,073	\$39,602,800	\$44,661,200
Transportation (including gas)	\$28.5	118,470	\$3,376,400	\$22.2	896,985	\$19,913,100	\$23,289,500
Shopping/Arts/Antiques	\$10.2	40,618	\$412,300	\$19.2	473,879	\$9,098,500	\$9,510,800
Rec/Tour/Event Ticket Fees	\$1.6	37,233	\$59,600	\$6.0	396,027	\$2,356,400	\$2,416,000
Other	\$5.1	3,385	\$17,300	\$3.1	67,697	\$206,500	\$223,800
			\$8,924,000			\$124,676,100	\$133,600,100

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 Winslow-Holbrook area in the study period was estimated at 1,675,500 visitors. These visitors were responsible for some \$133.6 million of expenditures in Navajo County, with an average regional expenditure of \$208 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 \$133.6 million of Regional Expenditures by Winslow-Holbrook area visitors

Impact Type	Direct Effect	Indirect Effect	Induced Effect	Multiplier	Total Effect
Output	\$133,600,100	\$22,687,700	\$14,429,400	1.35	\$170,717,200
Employment	1,586	127	123	1.16	1,836
Labor Income	\$33,409,000	\$5,513,500	\$4,351,800	1.30	\$43,274,300
Tax	\$14,898,000	\$1,727,200	\$2,008,800	0.00	\$18,634,000

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 A3, visitors to the Winslow-Holbrook area spurred an additional \$18.6 million of tax revenue for Navajo 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 Winslow-Holbrook area visitors is the result of sales taxes 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 2012 visitors to the Winslow-Holbrook area injected significant output to businesses in the regional economy of Navajo County. Approximately \$133.6 million of regional purchases were made by out-of-region visitors, contributing to a total economic output of \$170.7 million for Navajo County. This economic activity supported some 1,836 full-time equivalent (FTE) jobs and tax revenue of \$18.6 million. The total economic impact of visitors to the Winslow-Holbrook area is substantial and contributes significantly to the greater regional economy.

Appendix B

Survey Instrument

WINSLOW - HOLBROOK AREA VISITOR STUDY

Hello! Welcome to the Winslow-Holbrook area. 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 the Winslow-Holbrook area? Mark all that apply.

- ☐ Newspaper ☐ Radio ☐ Online/Website ☐ Painted Cliffs Welcome Center
☐ Magazine ☐ TV ☐ Social Networking Sites ☐ Word-of-mouth
☐ Been here before ☐ Route 66 Passport ☐ Other, list:

2. Is the Winslow-Holbrook area the primary destination of your trip?

☐ Yes ☐ No If not, what location is the primary destination of your trip?

3. Please mark all of the following communities you plan to visit on this trip.

- ☐ Winslow, ☐ Snowflake/Taylor ☐ Window Rock ☐ New Mexico
☐ Holbrook ☐ White Mt. Region ☐ The Hopi Tribe ☐ Phoenix Area
☐ Petrified Forest N' Park ☐ Flagstaff ☐ Grand Canyon N' Park
☐ Sedona ☐ The Navajo Nation ☐ Chinle/Canyon de Chelly ☐ Other:

4. Indicate the primary purpose(s) of your current visit to the area. Mark all that apply.

- ☐ Just Passing Through ☐ Vacation/Leisure ☐ Climate ☐ Other, define:
☐ Day Trip ☐ Business Travel ☐ Route 66
☐ Weekend Visit ☐ Visiting Friends and/or Relatives ☐ Relocation

5. Indicate your primary mode of transportation.

- ☐ Private auto ☐ RV/Camper ☐ Tour bus
☐ Rental car ☐ Motorcycle ☐ Amtrak ☐ Other, define:

6. How much time, in total, will you spend in the Winslow-Holbrook area 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) 1
 If a day trip only, how many hours:
 If staying overnight, how many nights:

7. If staying overnight in the Winslow-Holbrook area, what type of lodging are you using?

- Mark all that apply. (Leave blank if staying elsewhere)
☐ Hotel/Motel ☐ RV Park ☐ B&B
☐ Home of Friends/Family ☐ Campground ☐ Other, define:

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?

8. 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:

9. Please estimate as closely as possible the amount of money that your travel party is spending per DAY in the Winslow-Holbrook area for the following categories in U.S. dollars with NO decimal places. Example 92

First, please tell us the number of people these expenses cover.

Lodging/Camping \$

Restaurant & Grocery \$

Transportation (incl gas) \$

Shopping/Jewelry/Antiques \$

Recreation/Tour/Entrance /Permit fees \$

Other \$

Define Other:

7105423800

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

Interest Level:	Not at all	A little	Some-what	Very	Extremely	Did/Will you participate?
Native American Jewelry/Arts & Crafts	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Antique/Pawn Shopping.....	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Hunting	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Camping/RV Stay	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Geocaching	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Hiking/Walking.....	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Outdoor Recreation/Adventure Sports	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Touring by Motorcycle.....	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Tribal Arts & Culture	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Route 66	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Scenic Drives	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Visiting Cultural & Historic Buildings..	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Visiting Museums	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Visiting National & State Parks	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Standing on the Corner photo opportunity	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Rodeo/Western Activities.....	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Attending a special event (concert, festival etc.): Define here						<input type="radio"/>
Other activity:	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Define here						

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

- | | | |
|--|---|--|
| <input type="radio"/> La Posada Hotel | <input type="radio"/> Homolovi State Park | <input type="radio"/> Snowflake LDS Temple |
| <input type="radio"/> Downtown Winslow | <input type="radio"/> Rock Art Ranch | <input type="radio"/> Hopi Mesas |
| <input type="radio"/> Standing on the Corner Park | <input type="radio"/> Meteor Crater | |
| <input type="radio"/> Hubbell Trading Post/Visitors Center | <input type="radio"/> Holbrook Court House Visitor Center & Museum | |
| <input type="radio"/> First Street Pathway | <input type="radio"/> Downtown Holbrook | |
| <input type="radio"/> Peter Toth Monument (Totem) | <input type="radio"/> Wigwam Motel | |
| <input type="radio"/> Old Trails Museum | <input type="radio"/> Hashknife/Pony Express | |
| <input type="radio"/> 9-11 Memorial Park Garden | <input type="radio"/> Petrified Forest/Painted Desert National Park | |
| <input type="radio"/> McHood Park/Clear Creek | <input type="radio"/> Other, List: <input type="text"/> | |

12. On a scale of 1 to 10 where one is Low and ten is High, please indicate your overall satisfaction with your experience in the Winslow-Holbrook area.

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

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.

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

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

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

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

16. 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.

5001423803