NORTHERN ARIZONA UNIVERSITY | Economic Policy Institute

# 2023 Arizona Wine Tourism Industry — Growth and Opportunities


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## ACKNOWLEDGMENT

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## HOW TO USE THIS STUDY

Arizona vineyards, wineries and festivals play an important and growing role in enhancing Arizona's tourism industry by providing unique travel destinations, experiences and aesthetic appeal. The state is also home to a flourishing grape and wine industry, which, as an important sector of the state's agribusiness, has nearly tripled net production between 2012 and 2019.

This study sketches the landscape and identifies the economic impact of Arizona's wine tourism industry as it exists in 2023, with similar studies having been conducted in 2011 and 2017. This study surveyed wine tourism participants to collect information on general demographics, on-site expenditures, visitation length, and overall wine-tasting experiences. Surveys were administered to visitors (one per party) at tasting rooms, vineyards, and wineries in Arizona's three dominant wine-growing regions, also known as American Viticultural Areas or AVAs.

New to this study is an assessment of the impact of wine festivals and their attendees. Wineries have shared that in recent years, wine festivals have become increasingly impactful places for not only wine tasting, but also direct purchasing of wine by consumers. In addition, wine festivals are typically staged outdoors and include live music and culinary experiences, making them a great environment for social interaction. To understand this newer form of wine tourism, we talked to festival organizers and surveyed wine festival goers.

Ultimately, this study models the impacts Arizona wine tourists deliver to the state in terms of economic output, employment, most-impacted industries and taxation. From this data, probabilities were also derived for wine visitors making purchases at wine festivals, and in tasting rooms, vineyards, and wineries.

The source for the images on the cover page, acknowledge page, table of content page, and the list of figures page is AOT.

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# Key Findings

## Economic Impacts (2023)

Using the economic input-output model to include all direct, indirect and induced effects, in 2023, Arizona's wine tourism industry:

- Created an estimated **$351 million** in total economic output.
- Supported an estimated **2,430 jobs** and generated $115 million in labor income.
- Generated nearly **$40 million** in total taxes, $10 million of which was state taxes and $7 million was local taxes.

## Over A Decade of Growth

Arizona's wine tourism industry has shown incredible growth since 2011. This includes 500% or higher growth in categories including wine visitor spending, total economic output, employment and employment income.

Between 2011 and 2023:

- **Wine Visitor Spending** increased an astounding **677%**, from over **$31 million** to over **$241 million.**
- **Economic Output** increased **588%**, from over **$51 million** to over **$351 million.**
- **Wine-related Employment** increased **500%** from **405** employed to **2,430.**
- **Labor Income** increased **539%** from over **$18 million** to over **$115 million** in earnings.

## Visitors Overwhelmingly Approve of Arizona Wine Experiences

The study reveals a high level of satisfaction with Arizona wine experiences from both winery visitors and wine festival attendees.

- Overall **winery tourism** experiences **met or exceeded the expectations of 96% of respondents.** This includes 67% of winery visitors indicating their overall experience was better than expected and 29% saying it was exactly as expected. Only 2% indicated it was "worse than expected" and another 2% had "no expectations."
- **Nine out of 10 festival goers (94%) indicated they "like" or "love"** the wine festivals they attended. This includes 66% of respondents saying they "loved" the event, with 28% saying they "liked it." Only 5% indicated the event "needs improvement" and 1% provided no response.
- **Additionally,** about **94% of festival goers** indicated it is likely they would recommend an Arizona wine festival to a friend.

## Additional Survey Results Highlights

These results are largely presented in terms of the two groups surveyed, those who were surveyed during or after visiting wineries or vineyards and those who were surveyed during or after attending a wine festival. Total surveys collected were 997 from wine festival attendees and 692 from wineries, tasting rooms and vineyard visitors, although respondents were not required to answer every question.

- **Visitation Frequency:** The majority of winery visitors (80%) had visited a winery more than once in the past 12 months. For festival goers, half were return attendees.
- **Visitor Origin:** Out-of-state winery visitors comprised approximately 46% of the sample. Visitors traveled from 36 states to experience Arizona wine tourism, with California, Washington and Texas accounting for the top three visitor origin states.
- **Travel Party Size:** The average travel party size to wineries is 3 people and traveling with family is the most common party type.

# Key Findings

- **Length of Trip:** Around 40% of all survey respondents take a day trip to wineries or festivals, while about 30% stay for two or three nights.
- **Wine Purchasing:** Most wine tourists purchase wine. Over 70% of both winery visitors and festival attendees surveyed bought wine either during their visit or at the festival.
- **Location of Wine Purchasing:** Wine festivals are gaining popularity as wine-purchasing venues. On average, people bought 2.25 bottles of wine per party at wine festivals and 1.89 bottles at wineries.
- **Wine Festivals + Tourism:** Wine festivals are used by about 35% of respondents as an opportunity to visit other areas. Although the majority (65%) attend wine festivals as day trips, 20% extended the trip by one day; 12% extended it by 2 to 4 days, and 4% even extended it by 5 days or more.
- **Wine Experience Awareness:** For wineries, word of mouth accounts for the largest percentage (36%) of visitor awareness while for festivals, social media accounts for the largest percentage (34%).
- **Wine Region Spending:** Among the three main wine-producing regions (AVAs) in Arizona, visitors spend the most in the Verde Valley ($109 per night), followed by approximately $70 per night in the other two, Willcox and Sonoita.
- **Age:** Wine festivals are slightly more popular with those over 55 (approx 60% of wine festival attendees are 55+) while winery visitors are nearly evenly distributed among ages 25 to over 65.
- **Income:** Wine tourism is a higher-value tourism activity, with 91% of all survey respondents (both festival attendees and winery visitors) identifying as middle-income and upper-income.

Source: AOT

# Introduction / Findings

Arizona's wine industry has been growing during the past two decades, with the number of wine producers increasing more than ten times since 1999 **(Figure 1).** Arizona has 156 bonded (licensed by federal (Alcohol and Tobacco Tax and Trade Bureau ) and state governments) wine producers as of 6/30/2023 according to the Alcohol and Tobacco Tax and Trade Bureau (TTB), ranking 22nd among all states **(Figure 2).**

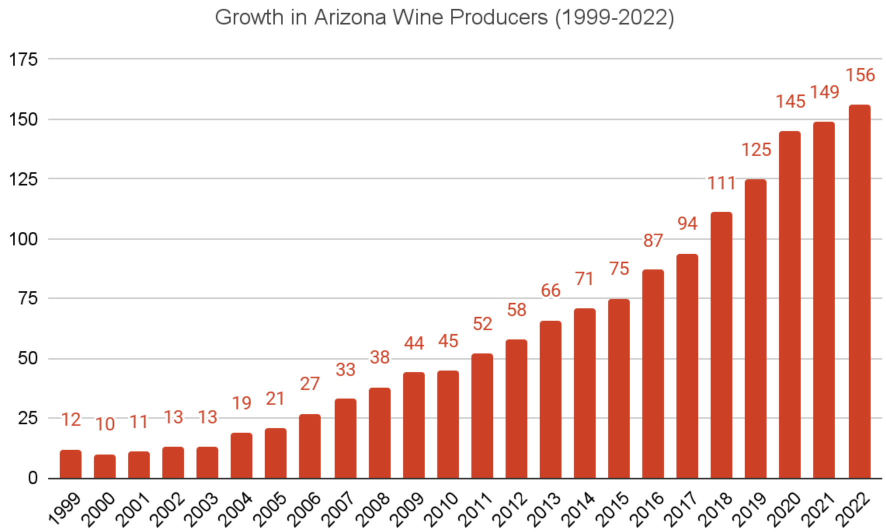



**Figure 1. Bonded Wine Producers in Arizona (1999-2022)** Source: TTB

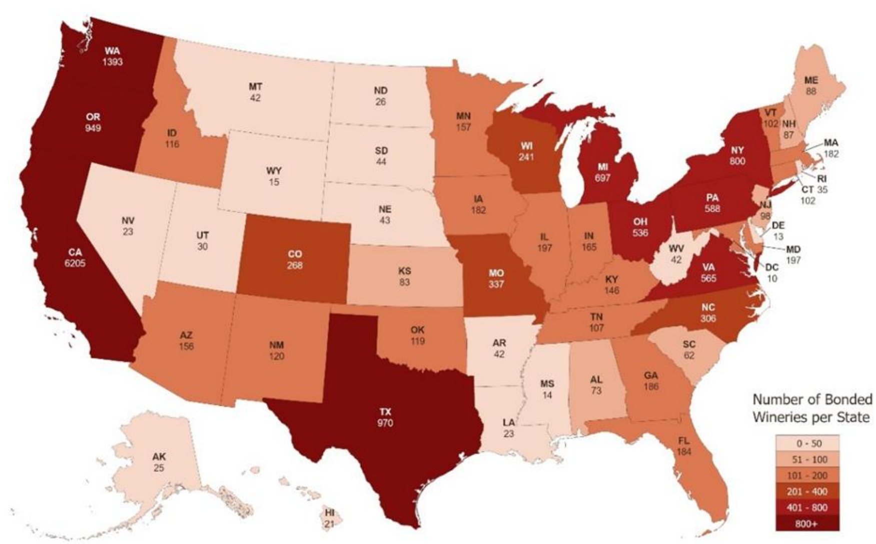



**Figure 2. Bonded Wineries in Each State (2023)** Source: TTB


**Figure 3. Arizona's Three American Viticultural Areas (AVAs)**

Source: TTB

Three regions in Arizona have earned American Viticultural Area (AVA) status, which is awarded by the federal government to designate regions particularly well-adapted to producing wine grapes with unique characteristics that consistently produce high-quality wine.

Arizona's AVAs are Sonoita in Santa Cruz County and Willcox in Cochise County, both in Southern Arizona and the Verde Valley in Yavapai County in North Central Arizona **(Figure 3)**. As the three predominant grape-growing and wine-producing regions of the state, they are the major focus of this study.

The success of Arizona's existing wine regions is driving experimentation in other areas of the state including in Kingman, Young, Chino Valley, Paulden, Dewey-Humboldt, and Globe, for example, with tasting rooms in multiple markets, especially the Phoenix, Scottsdale and Tucson metro markets and smaller markets including Prescott and Superior. These other areas are beginning to gain attention, but the three AVA regions lead the way in both wine production and visitor counts.

Additionally, the dramatic growth of wine festivals around the state is providing expanded opportunities for wine producers to promote their wines, pair them with culinary experiences and sell directly to festival attendees. Wine consumers enjoy the opportunity to sample a wide variety of products while being able to buy larger quantities of their favorite wines and enjoy the festival atmosphere. This trend appears to be on the upswing and is worthy of further study.

Source: AOT

# Methods

## Survey Design

NAU's Economic Policy Institute (EPI) created two surveys, one for attendees of wine festivals and one for those visiting wineries, vineyards and tasting rooms. Each asked a series of questions relating to visitor demographics, wine spending patterns and overall wine experience sentiment. Question types include numerical entries, single and multiple choice, Likert Scale[1] responses, yes/no responses and written responses. The two surveys are slightly different. For simplification reasons, the word "winery" is used to represent wineries, vineyards and their affiliated tasting rooms. The surveys can be found in Appendix 1 and Appendix 2.

Note: 1. The Likert Scale measures respondents' attitudes or feelings towards a particular topic. These questions present a statement and ask respondents to indicate their level of agreement or disagreement on a multi-point scale, typically ranging from strong agreement to strong disagreement.

## Survey Distribution

Wine festival attendees were surveyed through the web-based Qualtrics survey platform, which enables research, evaluations and other data collection activities. Festival organizers already had attendees' email addresses via the online ticket system, so it was easy for them to send out the survey link to those who purchased the tickets. That also ensured the person who registered for his or her group got the link so only one person filled out the survey for the group.

The winery visitor survey used both paper and online forms. Winery operators were asked to place a printed-out QR code at their properties so customers could scan it to be taken to the online survey. Additionally, an easy-to-fill-out paper survey was also provided at each location with a format that is compatible with ReMark OMR scanning software, to streamline the data processing. For some walk-in visitors, the paper survey was quite an attractive choice and thus productive. In addition, wineries were also encouraged to send the survey out to members of their wine clubs, since they already have their email addresses. The two formats of the winery survey were identical in content. However, due to space limitations of the paper survey, it didn't feature the three open-ended questions that were included in the online survey.

EPI personnel and Mr. Pitts attended stakeholder meetings and visited most wineries in the state to distribute the paper survey and the QR code that links to the online Qualtrics survey. Interactions also included talking with wine industry stakeholders to explain the scope and purpose of the study and hear about the progress and obstacles in doing wine business and developing Arizona's wine industry.

The winery survey was conducted from February 2023 to June 2023. The wine festival survey ran for a full year from October 2022 to September 2023 to include wine events throughout the year. A total of 1,507 survey responses were received from visitors to 71 wineries and 13 wine festivals.

*Table 1. Surveys Collected at Arizona Wineries, Vineyards, and Tasting Rooms*

| Location | Valid Surveys Collected | Percentage |
|---|---|---|
| Verde Valley | 243 | 35% |
| Sonoita | 171 | 25% |
| Willcox | 80 | 12% |
| Other Areas[1] | 16 | 2% |
| Unidentified[2] | 182 | 26% |
| **Total** | **692** | **100%** |

Notes: 1. Other areas are not within the three AVAs, such as the Phoenix metro area, and other scattered places in the state with tasting rooms, such as Kingman, Superior, Sierra Vista, and Tucson, etc.

2. Some respondents didn't answer the location question, or answered with a winery/tasting room with multiple locations, but didn't identify their region, making the locations unidentifiable.

*Table 2. Surveys Collected at Wine Festivals*

| Festivals | Valid Surveys Collected | Percentage |
|---|---|---|
| Off the Vine Arizona Wine Festival | 221 | 22% |
| Sedona Winefest | 130 | 13% |
| Willcox Wine Festival 2022 | 92 | 9% |
| Arizona Wine Festival | 91 | 9% |
| Camp Verde Pecan and Wine Festival | 91 | 9% |
| Willcox Wine Festival 2023 | 84 | 8% |
| Verde Valley Wine Festival | 72 | 7% |
| Litchfield Park Festival of the Arts | 55 | 6% |
| Tilted Earth at Page Springs Cellars | 44 | 4% |
| The Arizona Wine Garden Party | 41 | 4% |
| Kierland Fine Art and Wine Festival | 35 | 4% |
| Centennial Park Wine and Art Festival | 23 | 2% |
| Walkin' On Main | 18 | 2% |
| **Total** | **997** | **100%** |

## Survey Analysis

The survey results were used to compile descriptive statistics for the winery visitors group and wine festival attendee group. All survey statistics were then compared between the two groups. Spending data gathered by the two surveys was used to estimate the average spending in each category or industry surveyed and then used to perform the economic impact analysis.

For the winery survey, returned paper surveys were scanned with ReMark OMR software and combined with the online survey results. Returned surveys were used in the analysis if at least one question was answered. Survey results were compiled for statistical analysis in R and Microsoft Excel, and for economic impact analysis in IMPLAN.

## Economic Impact Analysis

Arizona wine tourism not only delivered revenue to wineries and wine festival organizers, but the surrounding lodging, restaurants, retail and recreational services all also benefited from wine visitor spending. Additionally, the increased economic activity also drove business-to-business transactions and supported additional jobs.

The Impact Analysis for Planning (IMPLAN) model was used to quantify the total impact of the Arizona wine tourism industry for this study. IMPLAN combines a set of extensive databases, economic factors, multipliers and demographic statistics with a highly refined, customizable modeling system.

The foundation upon which economic impact analyses are built is the input-output (I-O) model, which examines the inter-industry relationships within an economy, and captures all monetary market transactions between industries in a given period of time. The results of an input-output (I-O) analysis are broken down into direct, indirect, and induced effects. The direct effect is by the initial exchange, in the case of this study, the visitor

Source: AOT

direct spending in the wineries and wine festivals. The direct effect has indirect or multiplier effects that reverberate throughout the local economy. As a result, the combination of these overarching economic effects often totals greater than the initial economic input. Each level captures a different portion of the complete economic impact picture.

Direct Economic Impacts are the direct injections of new money into the community. For this study, it is the expenditures made within the area of the wineries or the festivals by the visitors and attendees from outside the area. These include lodging, food & beverage, grocery shopping, transportation (public transit and parking), gasoline, retail shopping (souvenirs, gifts etc.), and recreational spending (entrance fee, entertainment).

Indirect Economic Effects stem from business-to-business purchases in the supply chain. For this study, it includes additional inputs made by local businesses as a result of the direct impacts listed above. Examples include restaurants purchasing supplies from farmers, or retail stores purchasing their commodities from producers or wholesale markets.

Induced Economic Effects are created when local business owners, suppliers, and employees spend the additional income that they earned as a result of direct and indirect impacts. For this study, the spending took place because the wine tourism industry increased the sales for the support sectors, increased incomes for the proprietors and employees of those businesses, and increased sales for local retail and service businesses that both support those sectors and provide goods and services to the owners and employees of those companies.

In this analysis, it was determined that the State of Arizona was the appropriate region for the analysis. Once the above-mentioned three categories of spending data were collected, they were assigned to their respective IMPLAN sectors for analysis.

# Survey Analysis

## Respondents' Demographic Profile

### Age

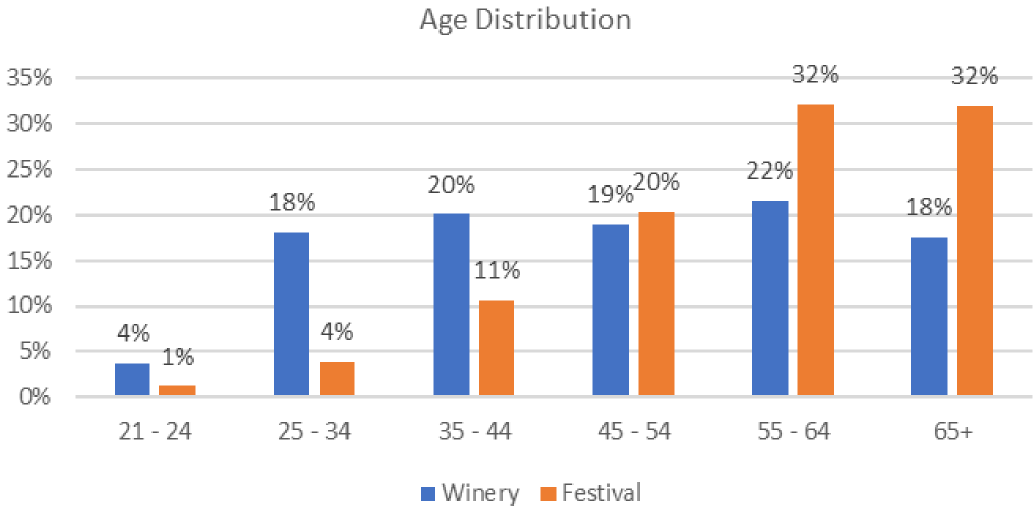
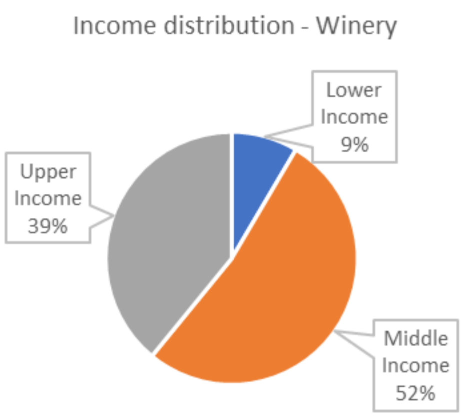


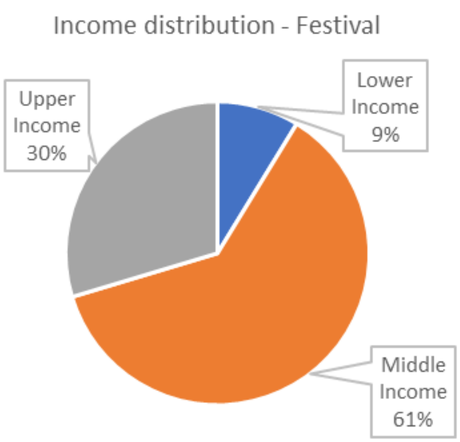

**Figure 4. Age Distribution**

N=637 for wineries; N=847 for festivals.

**Festival Goers:** More than 60% of festival goers are over 55 years old, while those who are 44 years and under only account for 16% of the sample.
**Winery Visitors:** The sample is almost evenly distributed among the ages from 25 to over 65 – wineries have a similar popularity among all age groups who are 25 years and above.

### Income




**LEFT: Figure 5. Income Distribution - Winery Visitors**
N=599.

**RIGHT: Figure 6. Income Distribution - Festival Attendees**
N=641.

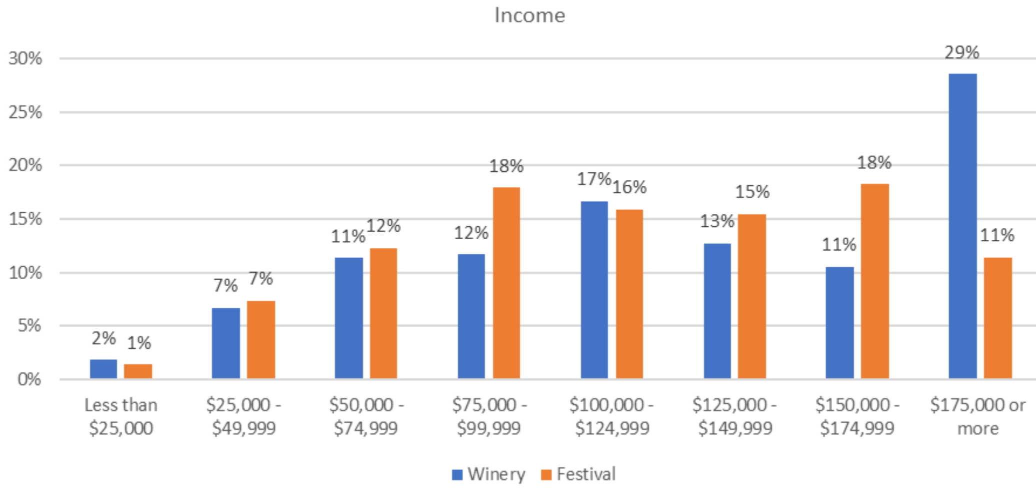



**Figure 7. Detailed Income Distribution - Winery Visitors & Festival Attendees**

N=599 for wineries, N=641 for festivals.

Pew Research Center defined "middle-income" adults in 2021 as those with an annual household income that was two-thirds to double the national median income in 2020. That is $52,000 to $156,000 for a household of three, after being adjusted by household size. For this survey, middle income is categorized as $50,000 - $149,000; with lower income being below $50,000, and upper income being $150,000+. The terms "middle income" and "middle class" are used interchangeably in this analysis.

The income distribution among both surveyed groups (winery visitors and wine festival attendees) shows similar but slightly different patterns. In the two surveys, middle-income and upper-income respondents account for 91% of all responses. Although more than half of the participants in both groups are middle class, there is a bigger proportion of middle-income respondents in the festival attendees group (61% for festival attendees and 52% for winery visitors). Accordingly, there is a bigger proportion of upper-income respondents in the winery visitors than in the festival attendees (Figure 5 and Figure 6).

Figure 7 shows a detailed income distribution: A bigger proportion of festival attendees earn $150,000 - $174,999, with a much bigger proportion of winery visitors earning $175,000 or more - accounting for almost 30% of all winery visitors sampled.

## Wine Festival Attendee Profession

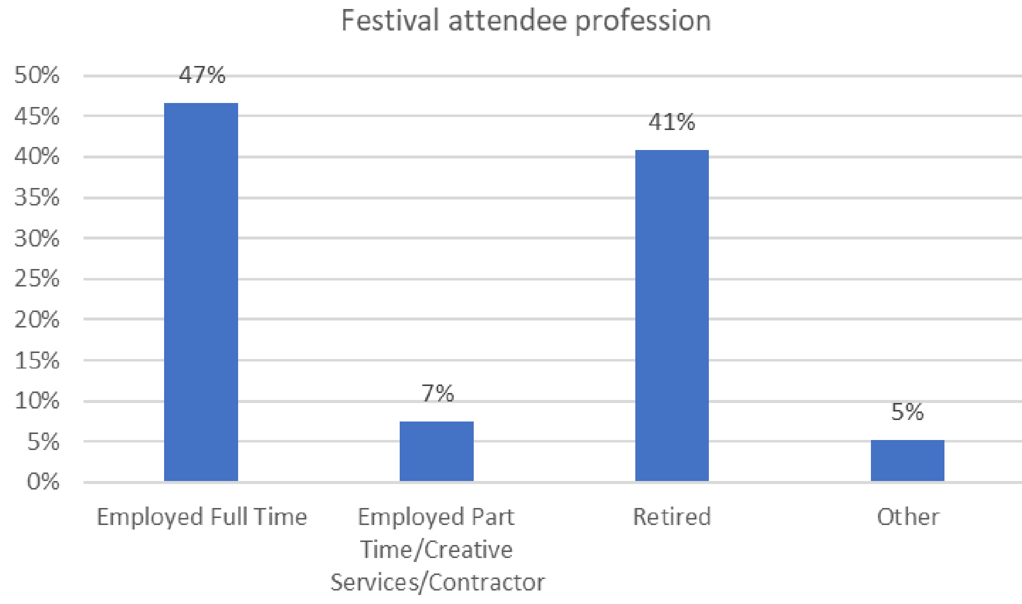



**Figure 8. Wine Festival Attendee Profession**
N=848.

Most wine festival attendees identify as either employed full-time or retired. These two groups are similar in size, with retirees having a slightly smaller proportion than employed full time. Together they account for 88% of the total sample (Figure 8).

## Winery Visitation Volume

**Wineries** have established a loyal customer base that visits them often. A total of 80% are return winery visitors and visited wineries more than once in the past 12 months. On average, for any particular winery surveyed, return visitors account for 47% of the sample, as shown in the first column of Figure 9.

For **wine festivals,** half of those sampled indicated that was their first time attending a wine festival. Return festival attendees accounted for the other half. Additionally, 42% of the sample have visited wine festivals two to five times, accounting for the majority of the return festival attendee sample (Figure 10).

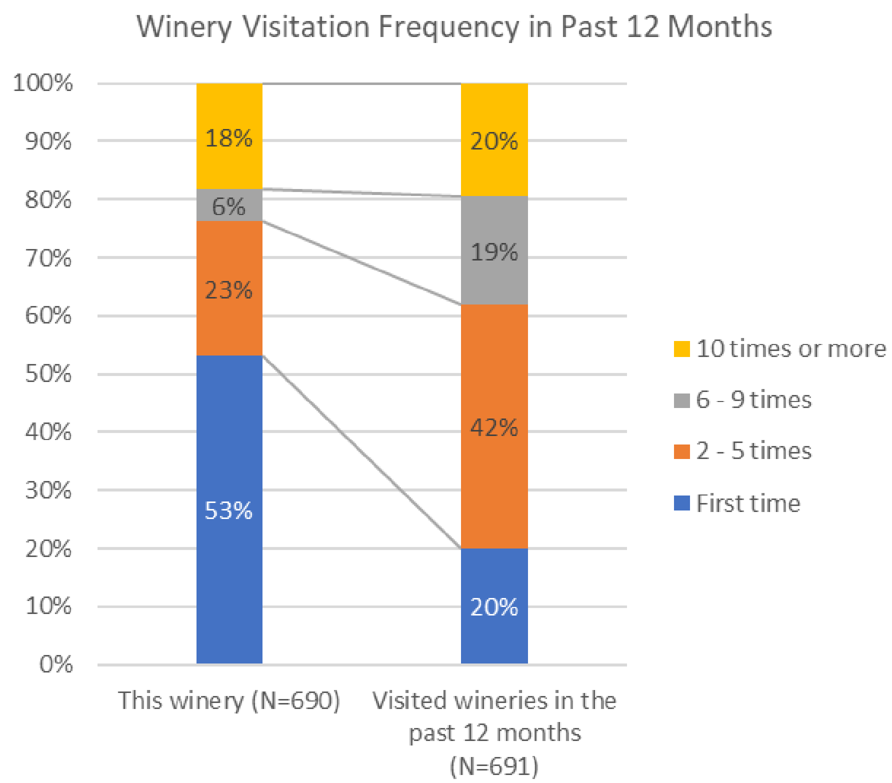



**Figure 9. Winery Visitation Frequency in Past 12 Months**

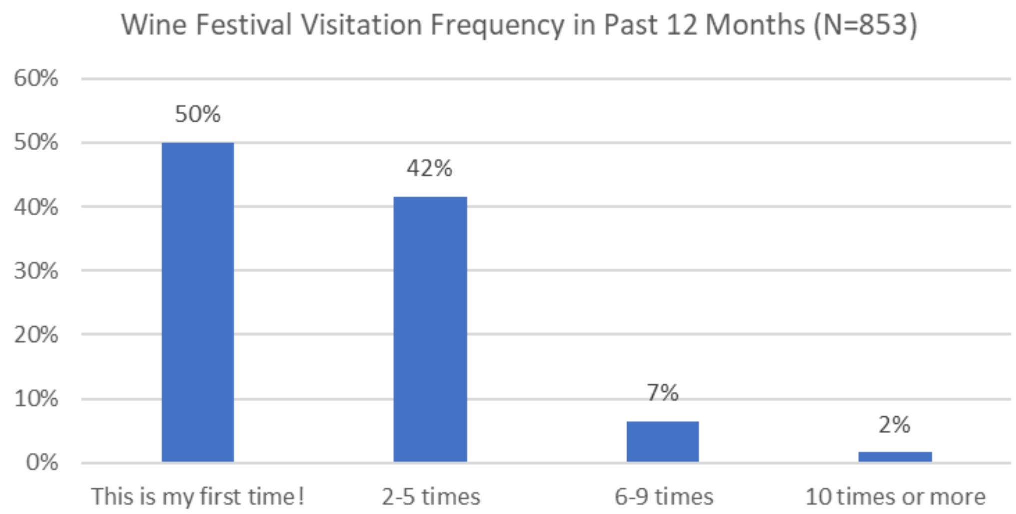



**Figure 10. Wine Festival Visitation Frequency in Past 12 Months**

## Winery Visitors Places of Origin

This question was only asked in the winery survey. Responses show that out-of-state wine visitors comprised approximately 46% of the sample. Visitors traveled from 36 states across the US. Arizona, California, Washington and Texas were the top four states supplying visitors. Table 3 lists the top places of origin for Arizona winery visitors with at least 2% of total visitation. Additionally, the survey revealed 2 winery visitors from Canada and 2 from Mexico. The full states of origin table is provided in Appendix 3.

*Table 3. Origin States for 2% + of Arizona Wine Tourists*

| State | Count | Percentage |
|---|---|---|
| Arizona | 165 | 54.1% |
| California | 11 | 3.6% |
| Washington | 10 | 3.3% |
| Texas | 9 | 3.0% |
| Illinois | 8 | 2.6% |
| Minnesota | 8 | 2.6% |
| Oregon | 7 | 2.3% |
| Ohio | 6 | 2.0% |
| Utah | 6 | 2.0% |

*Table 4. Arizona Origin Counties for In-State Visitors*

| AZ County | Count | Percentage |
|---|---|---|
| Maricopa | 92 | 55.5% |
| Pima | 28 | 17.5% |
| Pinal | 8 | 5.0% |
| Cochise | 7 | 4.4% |
| Coconino | 6 | 3.8% |
| Yavapai | 6 | 3.8% |
| Santa Cruz | 4 | 2.5% |
| Gila | 2 | 1.3% |
| Graham | 2 | 1.3% |
| Mohave | 2 | 1.3% |
| Apache | 1 | 0.6% |
| Navajo | 1 | 0.6% |
| Yuma | 1 | 0.6% |

In-state visitors dominate Arizona's wine tourism market. Approximately 54% of the sample identified as Arizona residents. Arizona wine visitors mostly originate from the greater Phoenix and Tucson metro areas, i.e., Maricopa, Pima, and Pinal counties. Over 62% of in-state wine tourists traveled from the greater Phoenix metro area with over 17% coming from the greater Tucson metro area. Together visitors from these three metro areas constitute 80% of in-state visitors (Table 4).

## Travel Party

For winery visitor travel party composition, a party of 2 people is the dominant size, accounting for about half of the sample (Figure 11). The average travel party is 2.99 people. Traveling with family is the most common party type, with 47% of the sample claiming they travel with family. 20% traveled with friends, and 28% of the sample traveled with family and friends (Figure 12).

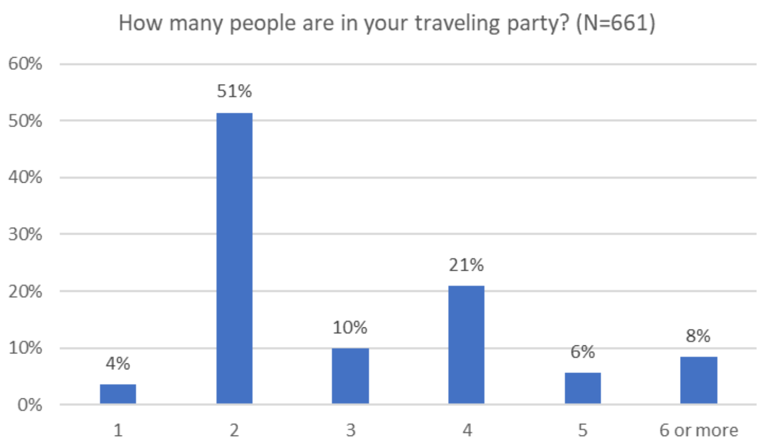



**Figure 11. Travel Party Size**

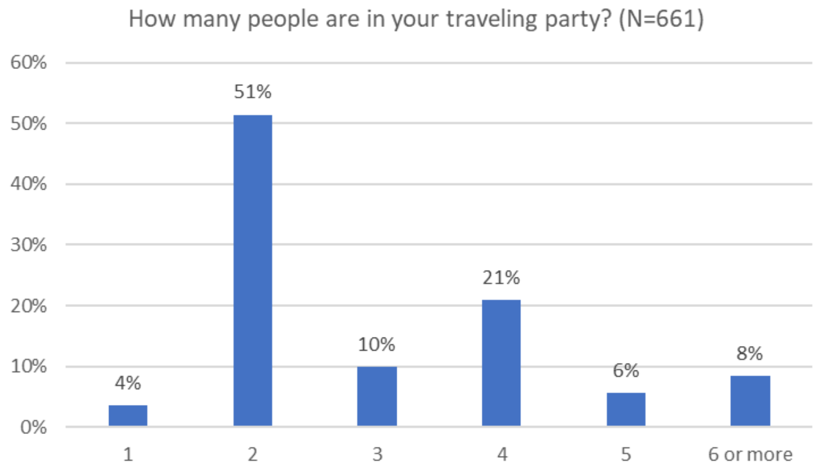



**Figure 12. Travel Party Type**

## Visitor Experience

### Nights Spent in Area

Both **winery visitors and festival attendees** stay about the same amount of nights in the area they're visiting (Figure 13). Around 40% of people take a day trip to a winery or festival, while about one-third of respondents stay for two to three nights. These two categories comprise around 70% of the sample.

The average nights stayed is also similar between both groups. When including day trip only visitors, the average nights stayed for winery visitors is 1.48 nights, while it's 1.38 nights for festivals. When day trip visitors are excluded, the average stay is 2.4 nights for winery visitors and 2.3 nights for festival attendees.

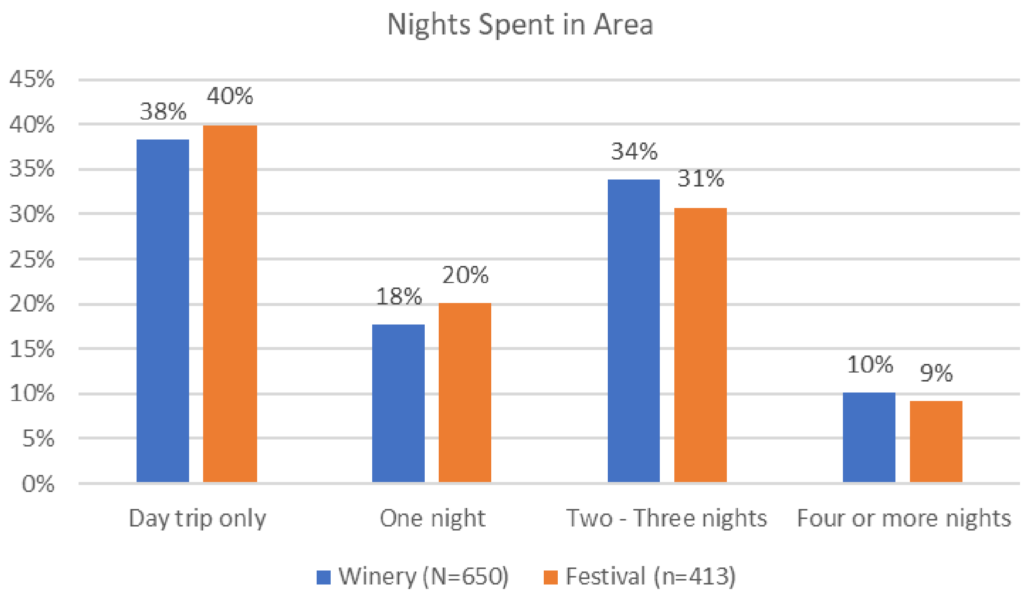



**Figure 13. Nights Spent in Area**

## Lodging Type

Lodging choices for winery attendees and festival goers are largely similar as shown in (Figure 14). In the winery survey, 48% of respondents indicated they would spend their nights in a Hotel/Motel, which is slightly higher than festival respondents (42%). Also, 18% of winery visitors chose the "staying with family/friends" option, while 12% of festival visitors chose this lodging type. The "AirBnB/Vrbo/B&B" and "campground/RV park" options were chosen nearly equally by both groups.

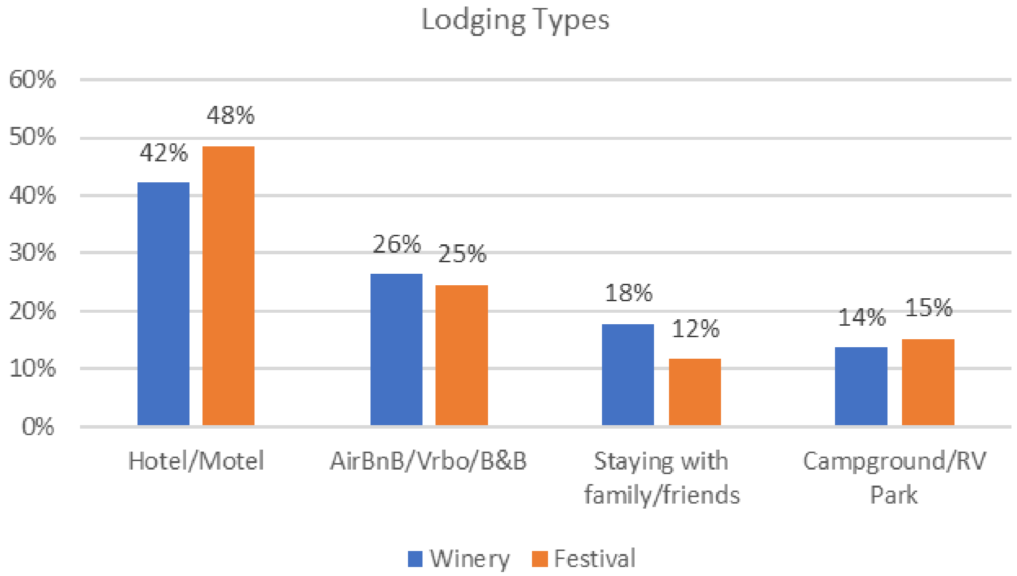
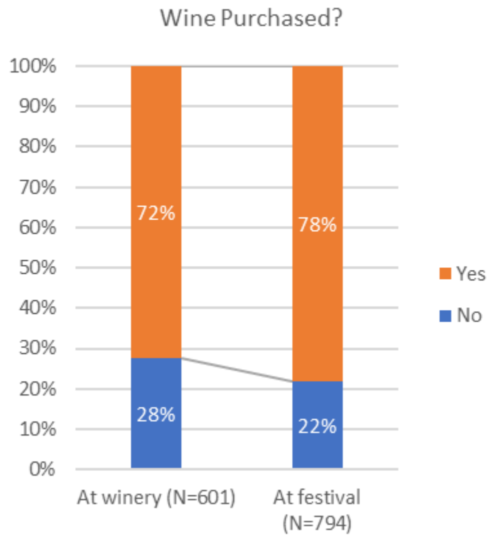


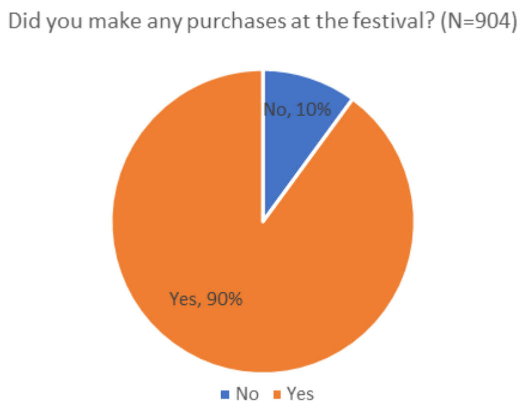

**Figure 14. Lodging Types**

N=410 for wineries, N-256 for festivals.

## Trip Activities

Over 70% of both winery visitors and festival attendees bought wine while visiting or attending an event, with slightly more festival attendees (78%) than winery visitors (72%) purchasing wine (Figure 15). When accounting for merchandise and food on sale, 90% of festival attendees made some type of purchase while there. (Figure 16).




**LEFT: Figure 15. Wine Purchased?**

**RIGHT: Figure 16. Festival Purchases?**

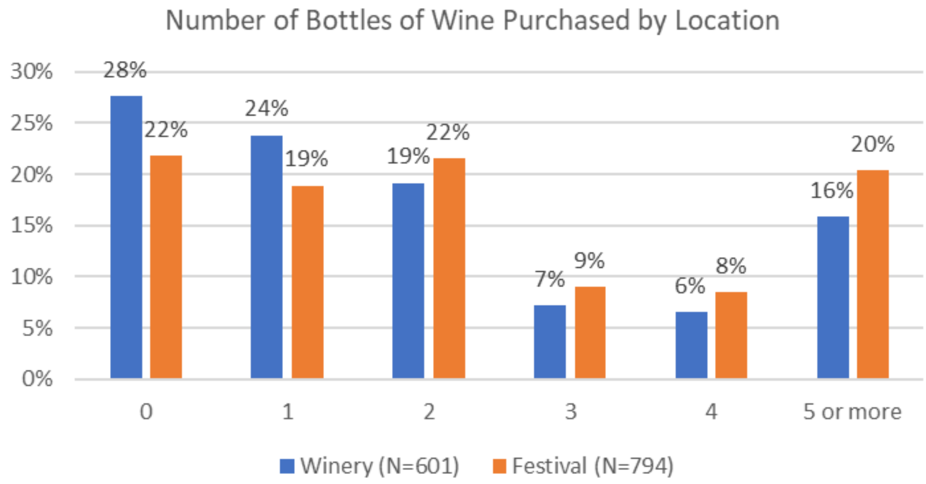



**Figure 17. Number of Bottles of Wine Purchased by Location**

The two sample groups show similar tendencies in the number of bottles of wine purchased (Figure 17). For people who bought wine, most purchased 1-2 bottles or 5 or more bottles. A slightly higher proportion of festival attendees bought more bottles (3, or 4, or 5 or more) than winery visitors, resulting in a higher number of bottles purchased on average at festivals than wineries. On average, festival attendees bought 2.25 bottles of wine per party, while winery visitors bought 1.89 bottles.

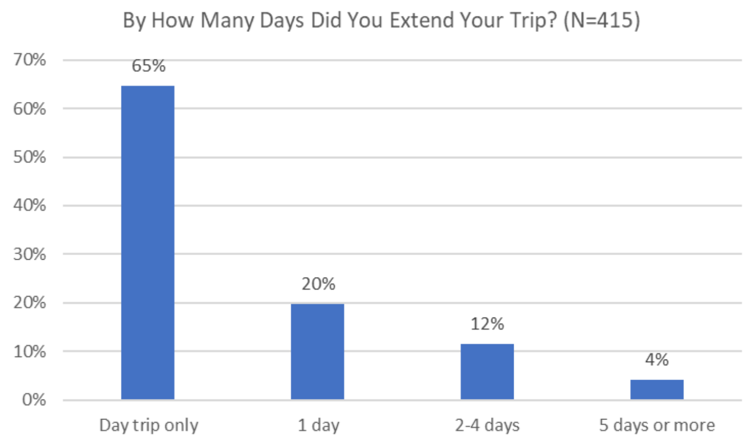



**Figure 18. By How Many Days Did You Extend Your Trip?**

Attending a wine festival also presents an opportunity for visitors to explore the surrounding areas. Although the majority attended the festival as a day trip (65%), 20% of respondents extended their trip by one day, 12% by 2-4 days, and 4% even extended it by 5 days or more (Figure 18).

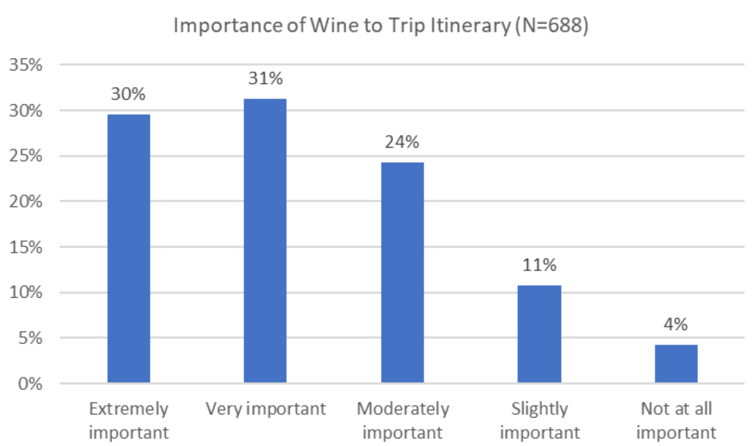
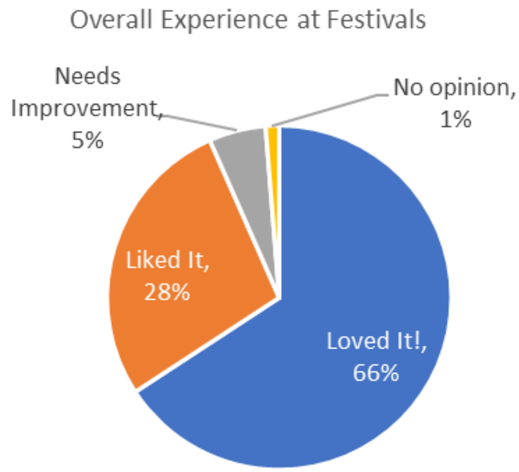



**Figure 19. Importance of Wine to Trip Itinerary**

Over 60% of respondents stated wine tasting and touring is either "extremely important" or "very important" to their trip itinerary. This shows wine tourism as the primary driver of the trip for these groups. When those who chose "moderately important" are included, the ratio becomes 85%.

## Experiences and Perceptions


**LEFT: Figure 20. Overall Experience at Wineries**

**RIGHT: Figure 21. Overall Experience at Festivals**

A strong 67% of respondents who visited wineries indicated their overall experience was better than expected, with 29% saying it was exactly as expected. Thus, the overall winery tourism experience met or exceeded the expectation of 96% of respondents. Only 2% indicated it was "worse than expected" and another 2% had "no expectations."

For festivals, 66% of respondents indicated they "loved" the event and 28% indicated they "liked it," with only 5% indicating the event "needs improvement" and 1% providing no response. Thus, 9 out of 10 festival goers like or love the events.

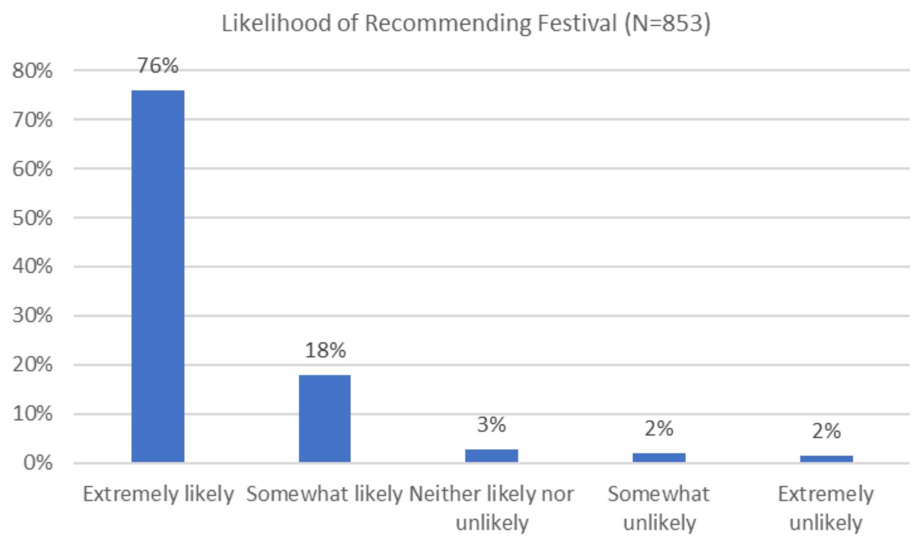



**Figure 22. Likelihood of Recommending Festival**

Further, about 94% indicated it is "extremely" or "somewhat" likely they would recommend a wine festival to a friend, indicating a high level of satisfaction with the events.

## Sources of Hearing About Wineries or Festivals

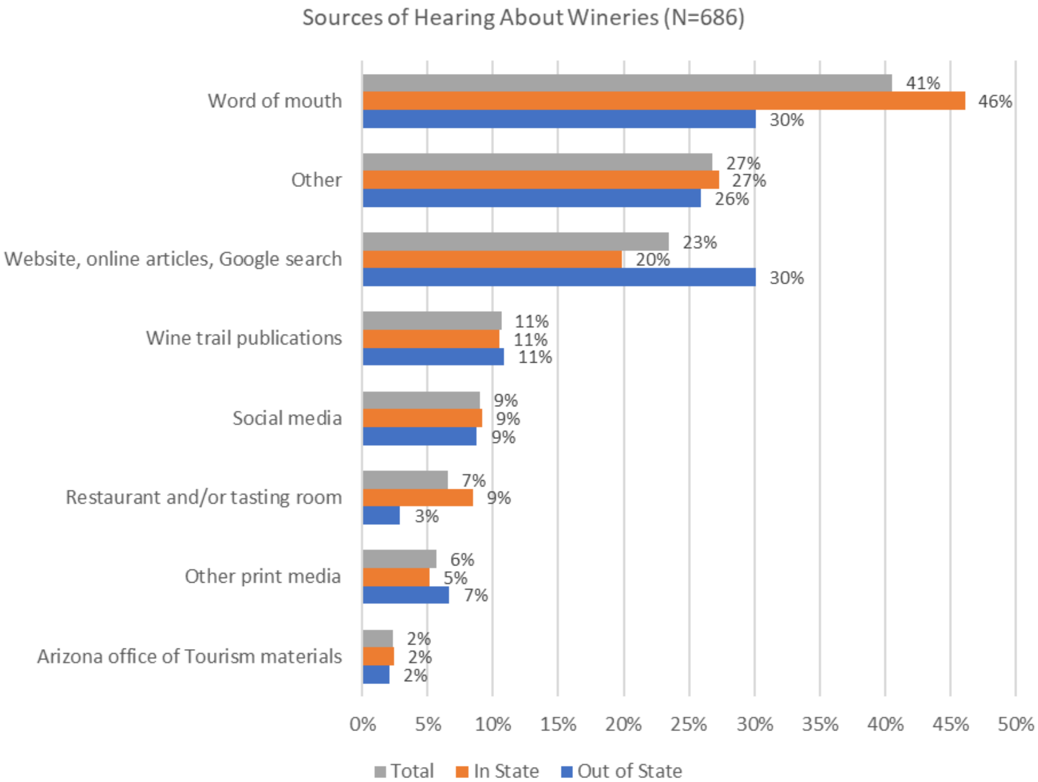



**Figure 23. Sources of Hearing About Wineries**

The surveys show slightly different sources for where wine visitors hear about wineries or festivals. For wineries, word of mouth accounts for the largest percentage (41%), with "website, online articles and Google search" accounting for 23% and social media at 9% (Figure 23). Diving deeper to look at information sources for in-state and out-of-state visitors, word-of-mouth as the source for in-state visitors is even higher (46%). For out-of-state visitors, "website, online articles and Google search" counted for the top two sources of hearing about wineries. In addition, commonly reported other sources of knowing about winery locations include driving by or being in the area and seeing the signs.

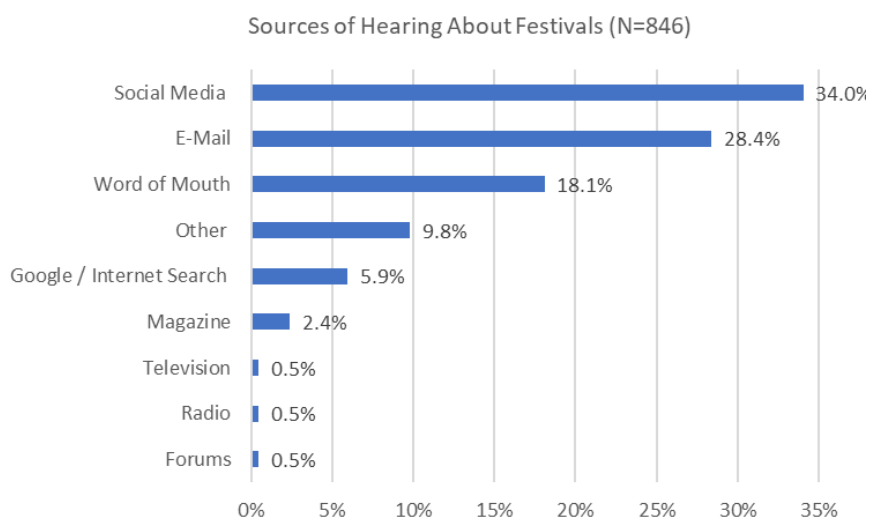
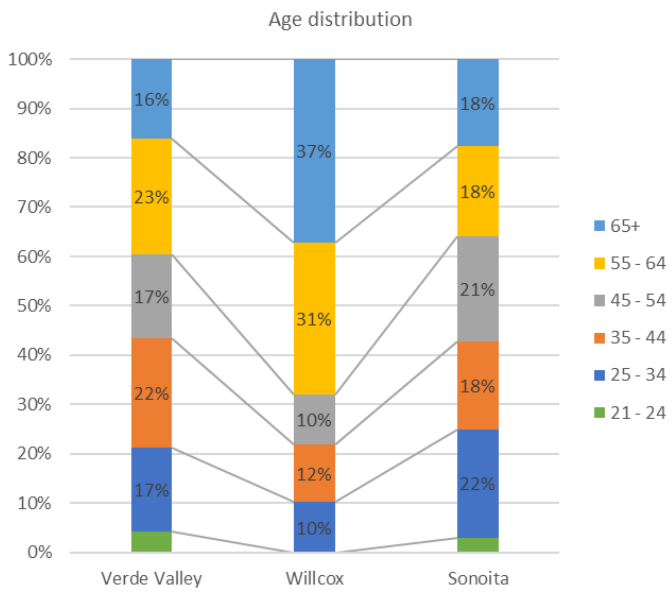
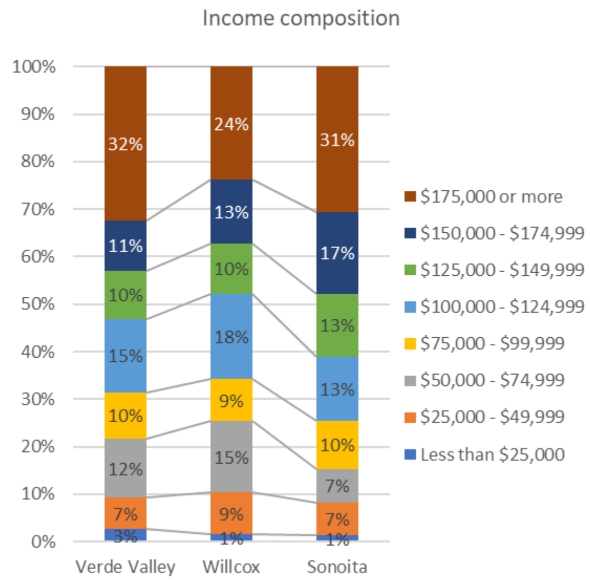



**Figure 24. Sources of Hearing About Festivals**

For festivals, social media accounts for the largest percentage (34%), followed by email (28.4%, which is bolstered by online ticket purchasing systems that enable direct marketing to customers), then word of mouth (20%) (Figure 24). Commonly reported other sources of knowing festivals include previous attendance, Eventbrite, local newspapers, and hearing from specific wineries. A complete list of the text entry for "other information" sources is available in Appendix 5 and 6.

## Analysis by Region

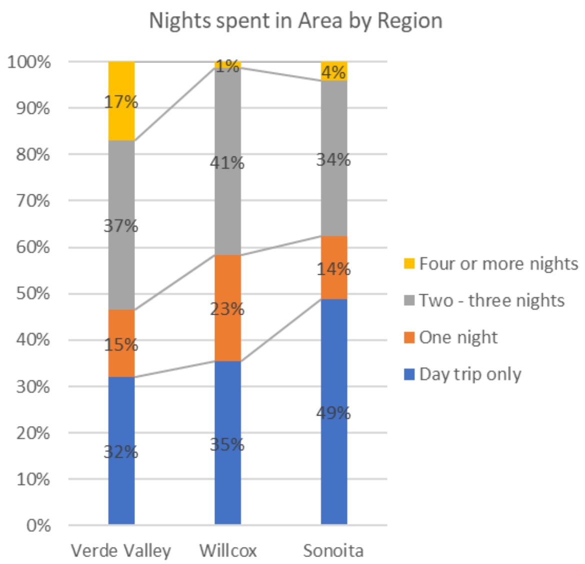


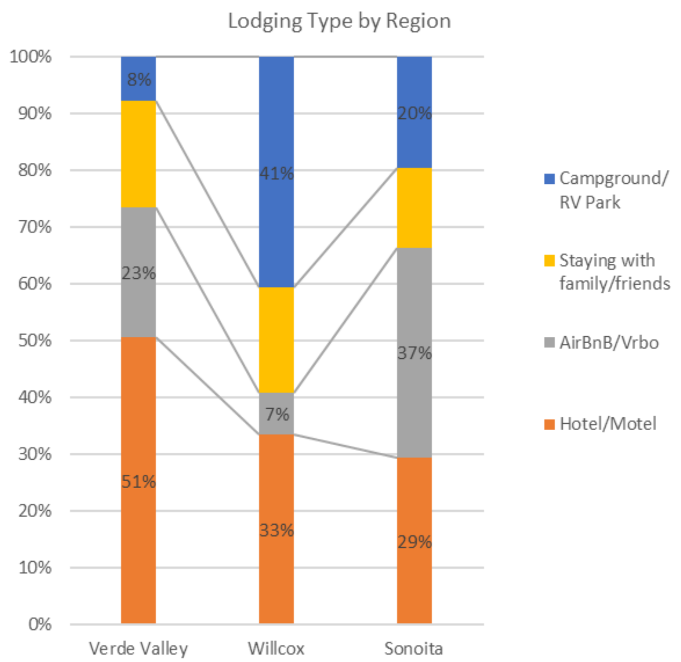




**LEFT: Figure 25. Winery Visitor Age Distribution by Region** N=236 for Verde Valley, N=79 for Willcox, and N=160 for Sonoita.
**RIGHT: Figure 26. Visitor Income Distribution by Region** N=227 for Verde Valley, N=67 for Willcox, and N=156 for Sonoita.

Key indicators provided by visitors to wineries in Arizona's three American Viticultural Areas (AVAs), were used to understand regional differences. For age, the Willcox region receives older visitors, with 55% of that sample over 65 years old, compared to 16% for the Verde Valley and 18% for Sonoita. Willcox also has a higher proportion of the 55-64 age group, compared to 23% in the Verde Valley and 18% in Sonoita (Figure 25).

For visitor income, the Verde Valley (43%) and Sonoita (48%) have a slightly higher proportion of upper-income visitors (with a household income $150,000 or more) than Willcox (37%) (Figure 26).




**LEFT: Figure 27. Nights Spent in Area by Region** N=241 for Verde Valley, N=79 for Willcox, and N=170 for Sonoita.
**RIGHT: Figure 28. Lodging Type by Region** N=165 for Verde Valley, N=55 for Willcox, and N=92 for Sonoita.

Visitors to the Verde Valley spent the highest number of nights among the three AVA regions. Here, 17% of visitors stay for four or more nights, while only 1% in Willcox and 4% in Sonoita stay that long. Willcox has the highest proportion of visitors who stay for two to three nights. Nearly half of the visitors in Sonoita are day trip only, while for the Verde Valley and Willcox, this number is 32% and 35% respectively (Figure 27).

In terms of lodging type, more than half (51%) of the visitors to the Verde Valley stay in a hotel/motel, while this figure is only 29% in Sonoita. Willcox has the highest proportion of campers, with 41% staying at a campground or RV park. Sonoita has the highest proportion of visitors who stay in an AirBnB/Vrbo, with 37% staying in this short-term rental type (Figure 28).

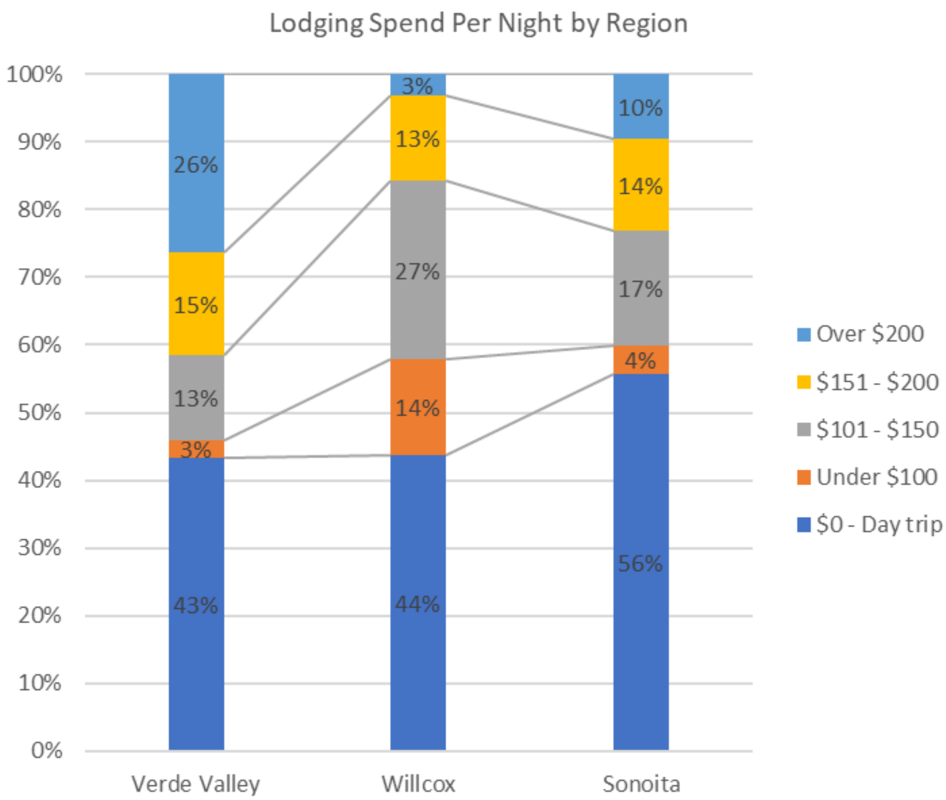



**Figure 29. Lodging Spend Per Night by Region**

N=224 for Verde Valley, N=64 for Willcox, and N=147 for Sonoita.

The Verde Valley earned the highest revenue from lodging among the three regions, with 26% of those surveyed spending more than $200 per night in lodging there. Accordingly, the Verde Valley has the highest average spending on lodging per night at $109.38. In Willcox, the highest proportion of visitors (27%) spent between $101 and $150 per night (Figure 29). The average lodging spending per night is nearly identical in Willcox and Sonoita, which is $69.92 and $70.92 respectively (Table 5).

*Table 5. Average Lodging Spent Per Night by Arizona Wine Region*

| Verde Valley | Willcox | Sonoita |
|---|---|---|
| $109.38 | $69.92 | $70.92 |

# Economic Impact of Arizona Wine Tourism

In FY2023, Arizona's wine tourism industry delivered an estimated $351 million in total economic output, an estimated 2,430 jobs (including full-time, part-time, and seasonal), and a total of $115 million in labor income. It contributed an estimated $191 million in value added/GDP. It generated nearly $40 million tax revenue, of which almost $10 million is state tax.

## Business Revenue

To increase the response rate for the expenditure questions, the answer choices were presented as ranges as opposed to asking respondents to provide exact numbers. The average spending of each category is shown below. The detailed process of calculating those average spendings can be found in Appendix 2. Wine visitors' expenditures in Arizona amounted to $241,815,292 in FY2023.

### Wineries

To estimate the number of winery visitors, a random sample of wineries in each AVAs was selected and then phone calls were made to those places to inquire about visitation numbers per year. From this data, an average annual visitation of 15,000 per year, per establishment was calculated. Adding in an estimated 71 wineries yields a total Arizona winery visitor population of 1,065,000. The winery survey was conducted on a per party basis with an average party size of 3 persons. Applying this to the visitor population estimate yields 355,000 parties visiting Arizona wineries per year. See below for average spending by category for winery visitors.

*Table 6. Average Spend at a Winery by Party*

| Average Spend at a Winery by Party: | | |
|---|---|---|
| Wine: **$88.10** | Food: **$35.01** | Merchandise: **$30.71** |
| **Total annual revenue of wineries and tasting rooms:** | | **$54,616,750** |

*Table 7. Average Spend by Travel Party Per Trip*

| Average Spend by Travel Party Per Trip | | |
|---|---|---|
| Lodging Per Night: **$124.18** | Average Nights Per Stay: **1.48** | Average Lodging Spend: **$183.79** (including those not staying overnight) |
| Restaurant/Bars: **$123.91** | Grocery: **$61.17** | |
| Gas/EV Charging: **$75.09** | Merchandise: **$59.48** | |
| **Total annual other business revenue for area delivered by winery visitors:** | | **$178,721,200** |

### Festivals

For wine festivals surveyed, total attendees was determined from data provided by festival organizers. Total visitation was 40,533 in FY2023 for all visitors, of which 15,683 purchased tickets that included wine tasting coupons in advance. This is a conservative estimate, since it doesn't include data from all wine festivals or the number of walk-in attendees. The wine festivals survey was conducted on a per party basis with an average party size of 3 persons. Applying this to the visitor population estimate yields 13,511 parties visiting Arizona festivals per year. See below for average spending by category for wine festival attendees.

*Table 8. Average Spend at a Festival by Party*

| Average Spend at a Festival by Party: | | |
|---|---|---|
| Wine: **$81.84** | Food: **$12.84** | Merchandise: **$23.25** |
| **Total annual revenue for festivals:** | | **$1,590,650** |

*Table 9. Average Spending in Festival Area by Travel Party Per Trip*

| Average Spend by Travel Party Per Trip (not including festival purchases) | | |
|---|---|---|
| Lodging Per Night: **$159.36** | Average Nights Per Stay: **1.38** | Average Lodging Spend: **$219.92** (including those not staying overnight) |
| Restaurant/Bars: **$95.32** | Grocery: **$49.20** | |
| Gas/EV Charging: **$42.44** | Merchandise: **$43.80** | |
| Transportation: **$32.04** | Recreation: **$26.99** | |
| **Total annual other business revenue for area delivered by festivals:** | | **$6,886,692** |

**Annual wine experience visitor spending totaled $241,815,292.**

## IMPLAN Analysis

### Average Spending

*Table 10. IMPLAN Input - Average Spending*

| Spending Category | IMPLAN Sector | Average at Winery | Spending at Festival |
|---|---|---|---|
| Wine at the Venue | 107 - Wineries | $88.10 | $81.64 |
| Food & Beverage at the Venue | 510 - Limited-Service Restaurants | $35.04 | $12.84 |
| Merchandise at the Venue | 411 - Retail - General Merchandise Stores | $30.71 | $23.25 |
| Lodging in the Area/Day | 507 - Hotels and Motels, including Casino Hotels | $124.18 | $159.36 |
| Restaurants/Bars in the Area | 509 - Full-Service Restaurants | $123.91 | $95.32 |
| Groceries in the Area | 406 - Retail - Food and Beverage Stores | $61.17 | $49.20 |
| Merchandise in the Area | 411 - Retail - General Merchandise Stores | $59.48 | $43.80 |
| Gas/EV Charging in the Area | 408 - Retail - Gasoline Stores | $75.09 | $42.44 |
| Recreation in the Area | 504 - Other Amusement and Recreation Industries | N/A | $26.99 |
| Transportation in the Area | 418 - Transit and Ground Passenger Transportation | N/A | $32.04 |

## Estimated Total Impact of Arizona Wine Tourism

All the categories of spending in Table 10 were entered into the IMPLAN model for the analysis. Direct, indirect, induced, and total effects derived from the Arizona wine tourism industry in FY2023 expenditures are presented in Table 11. These outputs are based on IMPLAN Group's 2021 data set.

*Table 11. Estimated Total Impact of Arizona Wine Tourism 2023*

| Impact | Employment | Labor Income | Value Added | Output |
|---|---|---|---|---|
| Direct | 1,540.91 | $60,592,031.29 | $99,704,690.73 | $184,418,543.97 |
| Indirect | 406.10 | $26,690,499.32 | $41,518,524.59 | $80,405,939.66 |
| Induced | 482.92 | $28,120,541.68 | $49,942,679.82 | $86,401,758.09 |
| **Total** | **2,429.93** | **$115,403,072.29** | **$191,165,895.14** | **$351,226,241.72** |

Source: IMPLAN model, 2021 Data, using inputs provided by EPI, Mountain Line, and IMPLAN Group LLC.

In Table 11 above, Direct impact is defined as all spending by visitors to wineries and wine festivals. This spending both brings revenue to winemakers while also directly benefiting lodging, restaurants, retail stores, etc. in the region. These initial changes are applied to the multipliers in IMPLAN to show how the region responds economically to these initial changes.

**Indirect impacts,** in turn, are defined as economic effects stemming from business-to-business purchases in the supply chain taking place within the region. This includes economic effects as a result of purchases by directly impacted industries, business-to-business purchases made by input suppliers and intermediate input suppliers of those suppliers within Arizona. For example, this includes wine cork and wine bottle distributors and manufacturers, firms who build structures in wineries, hotels and restaurants, designers who put the plans together, and finance firms who provide financing, etc.

**Induced impacts** represent economic effects stemming from household spending of labor income. The labor here includes those who work in all the directly impacted and indirectly impacted sectors and firms.

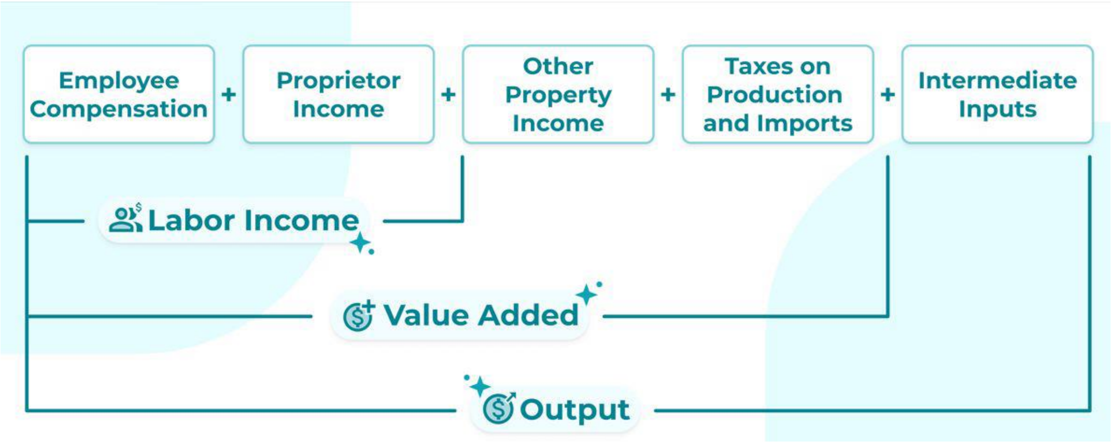



**Figure 30. Components of Economic Output**

Source: IMPLAN.com

As shown in Figure 30, Output is a measure of the total production of an industry. It includes Intermediate Inputs and Value Added. Intermediate Inputs are purchases of non-durable goods and services that are used to produce other goods and services, rather than for final consumption. Value Added includes all the "added value" to the Intermediate Inputs in order to produce the final product. Value Added is the contribution to Gross

Domestic Product (GDP). Labor Income is part of Value Added, which includes Employee Compensation, i.e., wages and benefits, and Proprietor Income. Value Added also includes taxes paid to the government less the value of subsidies received from the government by an industry, and other property income, e.g., corporate profits, consumption of fixed capital, and business current transfer payments.

The modeling results (Table 11) reveal that in 2023, Arizona wine tourism generated $351 million of total output, within which $191 million was value added (GDP). It generated $151 million in labor income, and supported 2430 full-time, part-time, or seasonal jobs.

## Estimated Tax Impact

In addition to the direct, indirect, and induced effects from the event spendings, tax dollars are also collected as a result of these economic activities. Table 8 distinguishes the various amounts of federal, state, and local tax collections resulting from the expenditures and the ripple effects of that economic activity. From the event's direct, indirect, and induced economic activity, approximately $40 million in taxes are collected.

*Table 12. Estimated Tax Impact of Arizona Wine Tourism 2023*

| Impact | Sub County General | Sub County Special Districts | County | State | Federal | **Total** |
|---|---|---|---|---|---|---|
| Direct | $1,542,493 | $1,794,225 | $712,151 | $5,397,188 | $11,808,343 | **$21,254,401** |
| Indirect | $467,598 | $547,515 | $217,003 | $1,789,511 | $5,283,709 | **$8,305,336** |
| Induced | $794,435 | $922,784 | $366,370 | $2,745,215 | $5,459,676 | **$10,288,479** |
| **Total** | **$2,804,526** | **$3,264,524** | **$1,295,523** | **$9,931,914** | **$22,551,729** | **$39,848,217** |

Source: IMPLAN model, 2021 Data, using inputs provided by EPI, Mountain Line, and IMPLAN Group LLC.

## Growth of Wine Economic Impacts in FY2011, FY2017, and FY2023

To reveal how Arizona's wine tourism has grown its economic impact over the years, the results in this report were compared with those from the two previous reports done by the precedent of EPI in FY2017 and FY2011, with the dollar amounts adjusted to FY2023 dollars, to make them comparable. Table 9 shows the comparison.

*Table 13. Growth of Wine Economic Impacts FY2011, FY2017, and FY2023*

| | 2011 | 2017 | 2023 | Growth 2011-2017 | Growth 2017-2023 | Growth 2011-2017 |
|---|---|---|---|---|---|---|
| Total Wine Visitor Expenditures | $31,140,958 | $71,036,674 | $241,815,292 | 128% | 240% | 677% |
| Economic Output | $51,487,634 | $70,541,646 | $351,226,242 | 37% | 398% | 588% |
| Employment | 405.1 | 640.6 | 2,429.9 | 58% | 379% | 500% |
| Labor Income | $18,512,440 | $21,686,727 | $115,403,072 | 17% | 432% | 539% |
| State and Local Tax | N/A | $4,494,763 | $17,296,487 | N/A | 285% | N/A |

## Top 10 Impact Sectors of Wine Tourism

Figures 31 and Figure 32 illustrate the top 10 sectors impacted by the economic activity delivered by wine tourism, in terms of output and employment. How those sectors are impacted is explained in one of the previous sections: Estimated Total Impact of Arizona Wine Tourism.

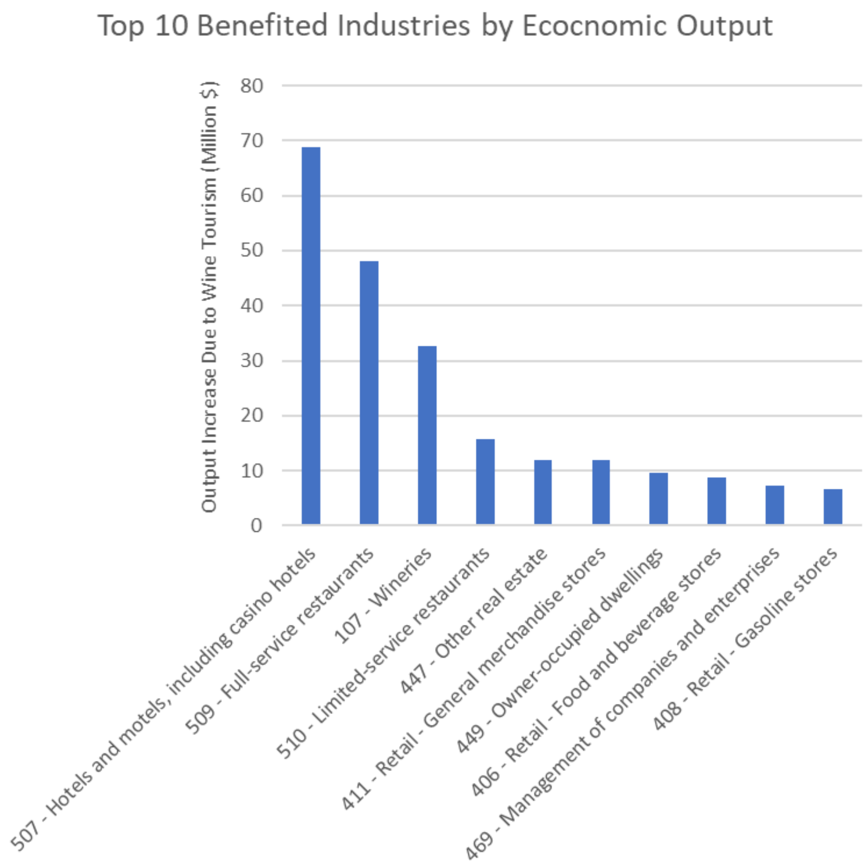



**Figure 31. Top 10 Benefited Industries from Wine Tourism by Economic Output**

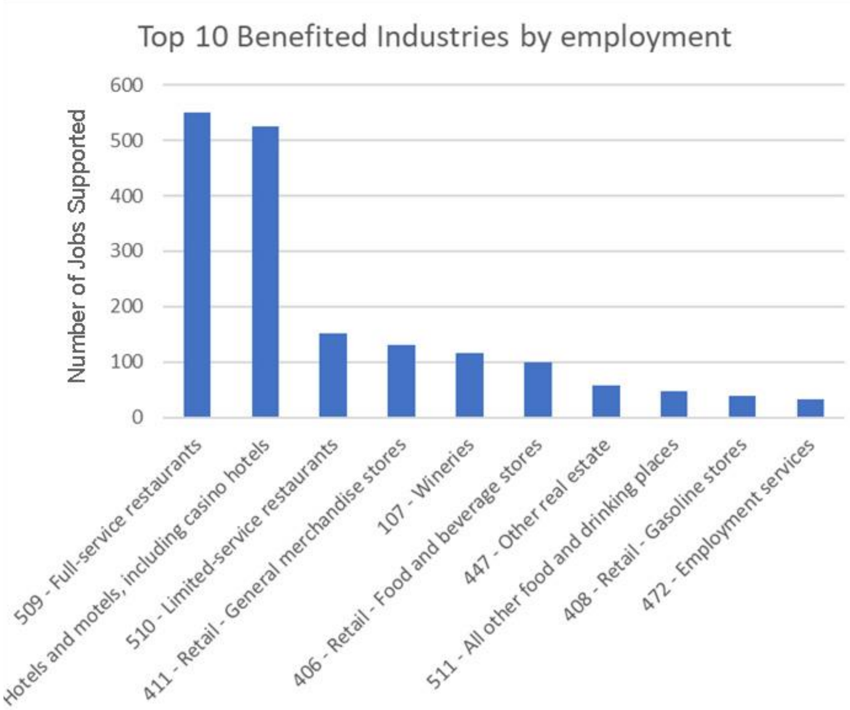



**Figure 32. Top 10 Benefited Industries from Wine Tourism by Employment**

# Appendices

## Appendix 1. Arizona Wine Tourism Survey

Arizona Office of Tourism has partnered with the Economic Policy Institute at Northern Arizona University to understand the economic impact of wine tourism across Arizona. Your answers are totally anonymous and will help us understand your visit and how we can improve services. Thank you.

**1. How many times have you visited this site before today's visit?**

- ○ First time
- ○ 2 - 5
- ○ 6 - 9
- ○ 10 or more

**2. How important is wine tasting/touring to your trip itinerary?**

- ○ Extremely important
- ○ Very important
- ○ Moderately important
- ○ Slightly important
- ○ Not at all important

**3. How many Arizona wineries/tasting rooms have you visited in the last 12 months?**

- ○ First time
- ○ 2 - 5
- ○ 6 - 9
- ○ 10 or more

**4. How was your overall experience at this winery/tasting room?**

- ○ Better than expected
- ○ As expected
- ○ Worse than expected
- ○ I had no expectations

**5. How did you hear about this location? Check all that apply.**

- ○ Arizona Office of Tourism materials
- ○ Wine trail publications
- ○ Arizona Wine Lifestyle
- ○ Other print media - brochures, magazines
- ○ Word of mouth
- ○ Website, online articles, Google search
- ○ Social media
- ○ Restaurant and/or tasting room
- ○ Chamber of Commerce
- ○ Other ______

**6. How many people are in your traveling party?**

- ○ 1
- ○ 2
- ○ 3
- ○ 4
- ○ 5
- ○ 6 or more

**7. Who is in your traveling party today?**

- ○ Family and Friends
- ○ Family only
- ○ Friends only
- ○ Traveling alone
- ○ Organized tour group
- ○ Business associates

**8. Which of the following were your reasons for your visit to Arizona wineries/tasting rooms? Check all that apply.**

- ○ Taste wine
- ○ Buy wine
- ○ Socialize with friends and/or family
- ○ Learn about wine tour or follow wine trail/route
- ○ Be able to talk to a vintner
- ○ Eat at the winery/tasting room
- ○ Beauty of rural Arizona vineyards
- ○ Attend a wine-related event
- ○ Buy wine related gifts/souvenirs
- ○ Experience Arizona agriculture

**9. How much time in total will you spend in this area?**

- ○ Day trip only (skip next question)
- ○ One night
- ○ Two nights
- ○ More than two nights

**10. What type of overnight lodging?**

- ○ Hotel/Motel
- ○ AirBnB/Vrbo
- ○ Home of Friends/Family
- ○ Campgrounds/RV Park

**11. List communities staying in** ______

**12. What is your annual household income?**

- ○ Less than $25,000
- ○ $25,000-$49,999
- ○ $50,000-$74,999
- ○ $75,000-$99,999
- ○ $100,000-$124,999
- ○ $125,000-$149,999
- ○ $150,000-$174,999
- ○ $175,000 or more

# Appendix 1. Arizona Wine Tourism Survey

**13. What is your age?**

- ○ 21 - 24
- ○ 25 - 34
- ○ 35 - 44
- ○ 45 - 54
- ○ 55 - 64
- ○ 65+

**14. 5-digit Zip code?**

**15. If not from US, which country?**

**16. Current winery or tasting room?**

**At this location specifically:**

**17. How many bottles of wine did you buy?**

- ○ 0
- ○ 1
- ○ 2
- ○ 3
- ○ 4
- ○ 5 or more

**18. How much did you spend on wine?**

- ○ $0 - $50
- ○ $51 - $75
- ○ $76 - $100
- ○ $101 - $125
- ○ $126 or more

**19. How much did you spend on food?**

- ○ $0 - $50
- ○ $51 - $75
- ○ $76 - $100
- ○ $101 - $125
- ○ $126 or more

**20. How much did you spend on merchandise at this location?**

- ○ $0 - $50
- ○ $51 - $75
- ○ $76 - $100
- ○ $101 - $125
- ○ $126 or more

**During this trip, for your travel party, how much are you spending on the following categories:**

**21. Lodging per night?**

- ○ Under $50
- ○ $51 - $100
- ○ $101 - $150
- ○ $151 - $200
- ○ Over $200

**22. Spending at restaurant/bars?**

- ○ Under $50
- ○ $51 - $100
- ○ $101 - $150
- ○ $151 - $200
- ○ Over $200

**23. Spending on groceries?**

- ○ Under $50
- ○ $51 - $100
- ○ $101 - $150
- ○ $151 - $200
- ○ Over $200

**24. Spending on gas/EV charging?**

- ○ Under $50
- ○ $51 - $100
- ○ $101 - $150
- ○ $151 - $200
- ○ Over $200

**25. Spending on merchandise?**

- ○ Under $50
- ○ $51 - $100
- ○ $101 - $150
- ○ $151 - $200
- ○ Over $200

## Appendix 2. Wine Festival Survey Example - Tilted Earth at Page Springs Cellars

1. Thank you for attending the Tilted Earth at Page Springs Cellars! We have partnered with Northern Arizona University to conduct an economic impact survey. Thank you in advance for your participation and we look forward to seeing you at a future events.

**2. Did you make any purchases at the festival?**

- ○ Yes
- ○ No

**3. How many bottles of wine did you purchase at the festival?**

- ○ 0
- ○ 1
- ○ 2
- ○ 3
- ○ 4
- ○ 5 or more

**4. How much did you spend on wine at the festival?**

- ○ $0 - $50
- ○ $51 - $75
- ○ $76 - $100
- ○ $101 - $125
- ○ $126 - $150
- ○ Other

**5. How much did you spend on food at the festival?**

- ○ $0 - $50
- ○ $51 - $75
- ○ $76 - $100
- ○ $101 - $125
- ○ $126 - $150
- ○ Other

**6. How much did you spend on merchandise at the festival?**

- ○ $0 - $50
- ○ $51 - $75
- ○ $76 - $100
- ○ $101 - $125
- ○ $126 - $150
- ○ Other

**7. Do you live in the Verde Valley?**

- ○ Yes
- ○ No

**8. In the Verde Valley, how much did you spend on food & beverage (not including groceries or festival purchases)?**

- ○ $0 - $50
- ○ $51 - $100
- ○ $101 - $150
- ○ $150 - $200
- ○ Other

**9. In the Verde Valley, how much did you spend on groceries (not including festival purchases)?**

- ○ $0 - $50
- ○ $51 - $100
- ○ $101 - $150
- ○ $150 - $200
- ○ Other

**10. In the Verde Valley, how much did you spend on merchandise (not including festival purchases)?**

- ○ $0 - $50
- ○ $51 - $100
- ○ $101 - $150
- ○ $150 - $200
- ○ Other

**11. In the Verde Valley, how much did you spend on gasoline/EV charging?**

- ○ $0 - $50
- ○ $51 - $100
- ○ $101 - $150
- ○ $150 - $200
- ○ Other

**12. In the Verde Valley, how much did you spend on transportation (include public transit and parking)?**

- ○ $0 - $50
- ○ $51 - $100
- ○ Other

**13. In the Verde Valley, how much did you spend on recreation (entertainment, etc.)?**

- ○ $0 - $50
- ○ $51 - $100
- ○ $101 - $150
- ○ $150 - $200
- ○ Other

**14. In the Verde Valley, how much did you spend on accommodation?**

- ○ $0 - $100
- ○ $101 - $150
- ○ $151 - $200
- ○ $201 - $250
- ○ $251 - $300
- ○ Other

**15. How many nights do you have accommodation to attend the festival?**

- ○ 0
- ○ 1
- ○ 2 - 3
- ○ 4 or more

**16. What type of accommodation did you have to attend the festival?**

- ○ Hotel/Motel
- ○ AirBnB/Vrbo/etc...
- ○ Campground
- ○ Bed and Breakfast
- ○ Staying with Family/Friends
- ○ N/A

**17. How many days did you extend your trip to explore Verde Valley in addition to attending the festival?**

- ○ 0
- ○ 1
- ○ 2 - 4
- ○ 5 or more

## Appendix 2. Wine Festival Survey Example - Tilted Earth at Page Springs Cellars

**18. How did you like the venue?**

- ○ Loved It!
- ○ Liked It.
- ○ No opinion.
- ○ Needs Improvement.

**If How did you like the venue? = Needs Improvement.**
**And How did you like the venue? = No opinion.**

**19. If you answer "Needs Improvement" or "No Opinion" above, feel free to elaborate.**

**20. What is your age?**

- ○ 21-24
- ○ 25-34
- ○ 35-44
- ○ 45-54
- ○ 55-64
- ○ 65+
- ○ Decline to answer

**21. What is your household income?**

- ○ Less than $25,000
- ○ $25,000-$49,999
- ○ $50,000-$74,999
- ○ $75,000-$99,999
- ○ $100,000-$124,999
- ○ $125,000-$149,999
- ○ $150,000-$174,999
- ○ $175,000 or more
- ○ Decline to answer

**22. What is your profession?**

- ○ Employed Full Time
- ○ Employed Part Time/Creative Services/Contractor
- ○ Retired
- ○ Other

**23. How likely are you to recommend this festival to a friend?**

- ○ Extremely likely
- ○ Somewhat likely
- ○ Neither likely nor unlikely
- ○ Somewhat unlikely
- ○ Extremely unlikely

**24. How many times have you attended this festival before?**

- ○ This is my first time!
- ○ 1
- ○ 2-5
- ○ 6-10
- ○ 10 or more

**25. How many total wine festival events have you attended this year?**

- ○ This was my first wine festival.
- ○ 2-3 wine festivals
- ○ 4-10 wine festivals
- ○ More than 10
- ○ Decline to answer

**26. What do we need to do to make this festival better?**

**27. How did you hear about this festival (select all that apply)?**

- ○ E-Mail
- ○ Social Media - Facebook, Instagram, Twitter, TikTok
- ○ Television
- ○ YouTube/Videos
- ○ Radio
- ○ Forums
- ○ Google/Internet Search
- ○ Magazine
- ○ Word of Mouth/Friend
- ○ Other

**28. Thank you for your time. Please add any additional comments about the event and/or your experience in the Verde Valley.**

## Appendix 3. Winery Visitor Place of Origin by State

| | | |
|---|---|---|
| Arizona | 165 | 54.1% |
| California | 11 | 3.6% |
| Washington | 10 | 3.3% |
| Texas | 9 | 3.0% |
| Illinois | 8 | 2.6% |
| Minnesota | 8 | 2.6% |
| Oregon | 7 | 2.3% |
| Ohio | 6 | 2.0% |
| Utah | 6 | 2.0% |
| Missouri | 5 | 1.6% |
| Nevada | 5 | 1.6% |
| North Carolina | 5 | 1.6% |
| Pennsylvania | 5 | 1.6% |
| Virginia | 5 | 1.6% |
| Wisconsin | 5 | 1.6% |
| Colorado | 4 | 1.3% |
| Michigan | 4 | 1.3% |
| New York | 5 | 1.6% |

| | | |
|---|---|---|
| Florida | 3 | 1.0% |
| Georgia | 3 | 1.0% |
| Indiana | 3 | 1.0% |
| Massachusetts | 3 | 1.0% |
| Tennessee | 3 | 1.0% |
| Idaho | 2 | 0.7% |
| Iowa | 2 | 0.7% |
| Kansas | 2 | 0.7% |
| New Mexico | 2 | 0.7% |
| Alabama | 1 | 0.3% |
| Kentucky | 1 | 0.3% |
| Louisiana | 1 | 0.3% |
| Maryland | 1 | 0.3% |
| New Jersey | 1 | 0.3% |
| New Hampshire | 1 | 0.3% |
| South Dakota | 1 | 0.3% |
| Vermont | 1 | 0.3% |
| Wyoming | 1 | 0.3% |

## Appendix 4. Wine Visitors Average Spending

(Data Derived from Survey Results)

*Spending on Wine at Wineries*

| Amount | Count | Proportion | Mid-Point | Amount Spent |
|---|---|---|---|---|
| $0 - $50 | 257 | 42% | $25 | $6,425 |
| $51 - $75 | 100 | 16% | $63 | $6,300 |
| $76 - $100 | 85 | 14% | $88 | $7,480 |
| $101 - $125 | 48 | 8% | $113 | $5,424 |
| $126 or more | 117 | 19% | $238 | $27,846 |
| **Total** | **607** | **100%** | **Average** | **$88.10** |

*Spending on Wine at Festival*

| Amount | Count | Proportion | Mid-Point | Amount Spent |
|---|---|---|---|---|
| $0 - $50 | 302 | 42% | $25 | $7,550 |
| $51 - $75 | 147 | 20% | $63 | $9,261 |
| $76 - $100 | 95 | 13% | $88 | $8,360 |
| $101 - $125 | 75 | 10% | $113 | $8,475 |
| $126 or more | 108 | 15% | $238 | $25,704 |
| **Total** | **727** | **100%** | **Average** | **$81.64** |

## Appendix 4. Wine Visitors Average Spending (Data Derived from Survey Results)

*Spending on Food at Wineries*

| Amount | Count | Proportion | Mid-Point | Amount Spent |
|---|---|---|---|---|
| $0 - $50 | 494 | 82% | $25 | $12,350 |
| $51 - $75 | 58 | 10% | $63 | $3,654 |
| $76 - $100 | 26 | 4% | $88 | $2,288 |
| $101 - $125 | 8 | 1% | $113 | $904 |
| $126 or more | 13 | 2% | $138 | $1,794 |
| **Total** | **599** | **100%** | **Average** | **$35.04** |

*Spending on Food at Festival*

| Amount | Count | Proportion | Mid-Point | Amount Spent |
|---|---|---|---|---|
| $0 - $50 | 653 | 83% | $25 | $16,325 |
| $51 - $75 | 87 | 11% | $63 | $5,481 |
| $76 - $100 | 25 | 3% | $88 | $2,200 |
| $101 - $125 | 11 | 1% | $113 | $1,243 |
| $126 - $150 | 7 | 1% | $138 | $966 |
| Other | 1 | 0% | $175 | $175 |
| **Total** | **784** | **100%** | **Average** | **$12.84** |

*Spending on Merchandise at Wineries*

| Amount | Count | Proportion | Mid-Point | Amount Spent |
|---|---|---|---|---|
| $0 - $50 | 538 | 91% | $25 | $13,450 |
| $51 - $75 | 27 | 5% | $63 | $1,701 |
| $76 - $100 | 16 | 3% | $88 | $1,408 |
| $101 - $125 | 3 | 0% | $113 | $339 |
| $126 or more | 5 | 1% | $238 | $1,190 |
| **Total** | **589** | **100%** | **Average** | **$30.71** |

*Spending on Merchandise at Festival*

| Amount | Count | Proportion | Mid-Point | Amount Spent |
|---|---|---|---|---|
| $0 - $50 | 585 | 76% | $25 | $14,625 |
| $51 - $75 | 85 | 11% | $63 | $5,355 |
| $76 - $100 | 36 | 5% | $88 | $3,168 |
| $101 - $125 | 15 | 2% | $113 | $1,695 |
| $126 - $150 | 24 | 3% | $138 | $3,312 |
| Other | 25 | 3% | $175 | $4,375 |
| **Total** | **770** | **100%** | **Average** | **$23.25** |

## Appendix 4. Wine Visitors Average Spending

(Data Derived from Survey Results)

*Spending on Lodging per Night in the Area — Wineries*

| Amount | Count | Proportion | Mid-Point | Amount Spent |
|---|---|---|---|---|
| $0 - $50 | 101 | 26% | $ ----- | $0 |
| $51 - $100 | 30 | 7% | $75 | $2,250 |
| $101 - $150 | 86 | 22% | $125 | $10,750 |
| $151 - $200 | 78 | 20% | $175 | $13,650 |
| $200 or more | 99 | 25% | $225 | $22,275 |
| **Total** | **394** | **100%** | **Average** | **$124.18** |

*Spending on Lodging per Night in the Area — Festival*

| Amount | Count | Proportion | Mid-Point | Amount Spent |
|---|---|---|---|---|
| $0 - $99 | 208 | 51% | $ ----- | $0 |
| $100 - $200 | 58 | 15% | $150 | $8,700 |
| $201 - $300 | 62 | 15% | $250 | $15,500 |
| $301 - $400 | 6 | 1% | $350 | $2,100 |
| $401 - $500 | 12 | 3% | $450 | $5,400 |
| Other | 60 | 15% | $550 | $33,000 |
| **Total** | **406** | **100%** | **Average** | **$159.36** |

*Spending on Restaurants/Bar in the Area — Wineries*

| Amount | Count | Proportion | Mid-Point | Amount Spent |
|---|---|---|---|---|
| $0 - $50 | 122 | 21% | $25 | $3,050 |
| $51 - $100 | 140 | 24% | $75 | $10,500 |
| $101 - $150 | 98 | 17% | $125 | $12,250 |
| $151 - $200 | 54 | 9% | $175 | $9,450 |
| $200 or more | 167 | 29% | $220 | $36,740 |
| **Total** | **581** | **100%** | **Average** | **$123.91** |

*Spending on Restaurants/Bar in the Area — Festival*

| Amount | Count | Proportion | Mid-Point | Amount Spent |
|---|---|---|---|---|
| $0 - $50 | 157 | 38% | $25 | $3,925 |
| $51 - $100 | 88 | 22% | $75 | $6,600 |
| $101 - $150 | 43 | 10% | $125 | $5,375 |
| $151 - $200 | 88 | 22% | $175 | $15,400 |
| Other | 35 | 8% | $225 | $7,875 |
| **Total** | **411** | **100%** | **Average** | **$95.32** |

## Appendix 4. Wine Visitors Average Spending

(Data Derived from Survey Results)

*Spending on Groceries in the Area — Wineries*

| Amount | Count | Proportion | Mid-Point | Amount Spent |
|---|---|---|---|---|
| $0 - $50 | 369 | 65% | $25 | $9,225 |
| $51 - $100 | 91 | 16% | $75 | $6,825 |
| $101 - $150 | 39 | 7% | $125 | $4,875 |
| $151 - $200 | 21 | 4% | $175 | $3,675 |
| $200 or more | 44 | 8% | $225 | $9,900 |
| **Total** | **564** | **100%** | **Average** | **$61.17** |

*Spending on Groceries in the Area — Festival*

| Amount | Count | Proportion | Mid-Point | Amount Spent |
|---|---|---|---|---|
| $0 - $50 | 316 | 78% | $25 | $7,900 |
| $51 - $100 | 39 | 10% | $75 | $2,925 |
| $101 - $200 | 14 | 3% | $125 | $1,750 |
| $151 - $200 | 15 | 4% | $175 | $2,625 |
| Other | 21 | 5% | $225 | $4,725 |
| **Total** | **405** | **100%** | **Average** | **$49.20** |

*Spending on Merchandise in the Area — Wineries*

| Amount | Count | Proportion | Mid-Point | Amount Spent |
|---|---|---|---|---|
| $0 - $50 | 367 | 65% | $25 | $9,175 |
| $51 - $100 | 103 | 18% | $75 | $7,725 |
| $101 - $150 | 37 | 6% | $125 | $4,625 |
| $151 - $200 | 26 | 5% | $175 | $4,550 |
| $200 or more | 34 | 6% | $225 | $7,650 |
| **Total** | **567** | **100%** | **Average** | **$59.48** |

*Spending on Merchandise in the Area — Festival*

| Amount | Count | Proportion | Mid-Point | Amount Spent |
|---|---|---|---|---|
| $0 - $50 | 585 | 76% | $25 | $9,175 |
| $51 - $100 | 121 | 16% | $75 | $7,725 |
| $101 - $150 | 34 | 4% | $125 | $4,625 |
| $151 - $200 | 5 | 1% | $175 | $4,550 |
| $200 or more | 25 | 3% | $225 | $7,650 |
| **Total** | **770** | **100%** | **Average** | **$43.80** |

## Appendix 4. Wine Visitors Average Spending

(Data Derived from Survey Results)

*Spending on Gas/EV Charging in the Area — Wineries*

| Amount | Count | Proportion | Mid-Point | Amount Spent |
|---|---|---|---|---|
| $0 - $50 | 226 | 39% | $25 | $5,650 |
| $51 - $100 | 221 | 38% | $75 | $16,575 |
| $101 - $150 | 75 | 13% | $125 | $9,375 |
| $151 - $200 | 22 | 4% | $175 | $3,850 |
| $200 or more | 36 | 6% | $225 | $8,100 |
| **Total** | **580** | **100%** | **Average** | **$75.09** |

*Spending on Gas/EV Charging in the Area — Festival*

| Amount | Count | Proportion | Mid-Point | Amount Spent |
|---|---|---|---|---|
| $0 - $50 | 279 | 72% | $25 | $6,975 |
| $51 - $100 | 91 | 24% | $75 | $6,825 |
| $101 - $200 | 7 | 2% | $125 | $875 |
| $151 - $200 | 10 | 3% | $175 | $1,750 |
| **Total** | **387** | **100%** | **Average** | **$42.44** |

*Spending on Transportation in the Area — Festival*

| Amount | Count | Proportion | Mid-Point | Amount Spent |
|---|---|---|---|---|
| $0 - $50 | 362 | 91% | $25 | $9,050 |
| $51 - $100 | 16 | 4% | $75 | $1,200 |
| Other | 20 | 5% | $125 | $2,500 |
| **Total** | **398** | **100%** | **Average** | **$32.04** |

*Spending on Recreation in the Area — Festival*

| Amount | Count | Proportion | Mid-Point | Amount Spent |
|---|---|---|---|---|
| $0 - $50 | 286 | 76% | $25 | $7,150 |
| $51 - $100 | 47 | 12% | $75 | $3,525 |
| $101 - $150 | 18 | 5% | $125 | $2,250 |
| $151 - $200 | 25 | 7% | $175 | $4,375 |
| **Total** | **376** | **100%** | **Average** | **$26.99** |

## Appendix 5. Winery — How Did You Hear About This Location?

Albertsons

Another winery

Billboard

Billboard

Billboard

BLANK

club member, return client

Drive by

Drive by

Drive by

Drove by

Drove by

Drove by

Drove past

Elevated wine tours

Grocery store

Harvest Host

Harvest host

Harvest Host

Harvest Hosts

Highway sign but had heard of this brand

Hotel sponsored voucher/ recommendation

I am a member of wine club

I own and operate a tour business. Wine tours included

I went to the college

In the neighborhood

just walking around

Local

Local

Local

Local residents told us

Long time fan

Long time fan

Long time fan

Maynard Fan

Maynard Fan

Maynard Fan

member of wine club

Members

Other

Other

Other

Party

Repeat customer

Repeat visitor

Road signs

Saw it when we were driving to our bed & breakfast

Searched internet

Signed up for wine club in Willcox

Staying in Willcox, familiar with the area

The wine wagon

Their wines are carried in Phoenix grocery stores

Tombstone and fort huachcua wine fest

Van driver/ trip host

Visited another tasting room in Sedona that sold this brand of wine

Von Hansons Meats & Spirits

Walked by

Walked by

Walked by

Walked by

Walked by

Walked by

Walked by

Walking around the local area we saw it

Walking around the town- looked cute

Walking by

We are here often

Willcox wine festival

Wine club member

Wine festival in perioa

Wine Tour

Wine Tour

Wine tour

Wine train

Wine Wagon

Yavapai college

## Appendix 6. Festival — How Did You Hear About This Location?

A winery

Arizona Star

Attend every year

attendance at fall festival

Attended before

Attended previous event

Banner on Main Street in Cottonwood

Banners in town

Been coming to the festival for years

Camp Verde website

Campground and tourism office

City Website

Eventbrite

Event app

Eventbrite

Eventbrite

Eventbrite

Eventbrite app

Friend

Friend

Friend of band

Friends

Friends

From Callaghans winery in Elgin

How did you hear about this festival (select all that apply?) - Other - Text

I follow wine festivals in the state

I have been attending every year for a while

I live in the Verde Valley and know we have the festival each year

I live in Willcox so it is a local event

I look for it every year as we've attended them all except for one I believe

I was visiting a winery in Wilcox and they told me about it

Kierland timeshare festival

Knowledge of event from the past

Kudos magazine

Live here

live in camp verde and always see the signs

Local paper Verde Valley Independent

Local Sedona circulars

Look for it every year on-line

My job

New Times

Newsletter from Oro Valley Water

Newspaper

Newspaper

Newspaper

Newspaper

Newspaper

Nextdoor App and newspaper ads

Oro Valley website

Our community newsletter Quail Creek in green valley

Past attendance

Past attendee

Past attendee

Phoenix news times

Previous attendance

Previous attendance and visiting a winery

Previous knowledge then Google search

Previous vendor

Previously attended

Print

Publication

Saw a brochure last year and booked our room to coordinate with this year

Sign at mall

Signage

signals az

Southwest Wine Center had a flyer and recommended we go

Sun City community news

Tasting room advertising

The campground told us

Tried to walk up last year and it was sold out! This year planned ahead

Tucson Daily Star

Tucson Foodie

Tucson newspaper

Vendor working Sedona Winefest! (Merkin Vineyards)

We had been at the winery a few years back and heard about it then

We live in Sedona and keep up with current happenings/ events

Went last year, did Google search

While at a tasting at Old Pueblo Cellars

Wildjoy Arizona

wine club retail

Wine Industry Blogs

Wineries remind me of the festival during visits

Winery

Winery member, I am

work