

Verde Valley Tourism Study Second Quarter
(January to March 2015)

The second quarter of the Verde Valley Tourism Study started well, with most sites keeping up with distributing surveys. All sites provided surveys, with a majority of sites falling short of meeting their targets. Overall, the quarter total was 23.7 percent short of the goal set for the entire study area. We anticipate a better response rate as the weather warms up and the tourist season begins in earnest in the Verde Valley.

Targets	Target	Surveys	% Below
Camp Verde	131	98	-33
Clarksdale	131	64	-67
Cottonwood	131	134	3
Sedona	263	159	-104
Jerome	131	146	15
Quarter #2 Total	789	601	-188

- Sedona (70.6%) was the most visited community in the Verde Valley, followed by Jerome (61.9%), Cottonwood (53.2%), Camp Verde (33.3%) and Clarksdale (24.4%). Visitors were asked to indicate all the communities they visited or intended to visit, therefore the total does not add up to 100% because of multiple responses.
- The Verde Valley was the primary destination for more than two-thirds of all visitors (70.0%), while Phoenix (35.0%) and the Grand Canyon (13.6%) were other destinations.
- A majority of visitors (55.8%) have visited the Verde Valley previously, an average of 10 times, while a surprising 44.2 percent are visiting the Verde Valley for the first time.
- The majority of visitors are on an overnight trip (58.5%), staying an average of 7.3 nights (median 4.0 nights), while two-fifths (41.5%) are on a day trip,
- Of those visitors staying overnight in the Verde Valley, the largest single cohort (49.1%) stay in a paid lodging (hotel/motel/resort), followed by those staying in a timeshare property (21.0%), while a further 10.0 percent stayed in a campground-RV Park. The remainder stay with friends or family (9.6%), a bed & Breakfast (5.5%) or a second home (1.7%).
- Friend or relatives (45.0%) who presumably have visited Sedona are the primary influencers for those who visited to the Verde Valley. This is followed by other (35.4%) which unfortunately is unidentified. Next was the Internet (13.6%), followed by magazine/newspaper article (3.6%), travel agent/tour operator (1.5%), and magazine/TV ad (0.9%).
- The Internet (50.4%) was the single most important resource in planning their visit to the Verde Valley, followed by friends or relatives (26.0%), other (15.0%), guidebook (4.7%), and travel brochure (1.5%), and travel agent/tour operator (1.3%).

- Sightseeing (42.9%) was the primary purpose for visiting the Verde Valley, followed by outdoor recreation including hiking, golf, kayaking, biking etc., (20.2%), visiting friends or relatives (12.2%), and other (10.3%). Other is followed by spiritual/metaphysical/wellness (3.7%), wine tasting (2.9%), special events and cultural/historic, 1.9 percent respectively. Other activities of interest to visitors were shopping (1.6%), followed by business, archeology and birding.
- Visitors to the Verde Valley had a median party size of 2 persons, and spent an average per-party, per-day of \$180 for lodging, \$112 for restaurant and grocery purchases, \$101 for other, \$78 respectively for shopping/souvenirs and recreation/entrance/tour/permit fees, followed by transportation (\$61) and spa/spiritual/metaphysical expenses (\$33). It is important to note however, that only 15 percent of all visitors had expenditures in the other category, while 80 percent had expenditures in the smaller per-party expenditure for restaurant and grocery expenditures.
- In terms of general activities in the Verde Valley, dining (67.5%), shopping (58.2%), hiking (48.8%), visits to art galleries and museums (46.8%), area creeks or rivers (34.5%) and wineries and tasting rooms (25.0%) garnered the highest participation amongst all visitors. These activities were followed by jeep/off highway vehicle tours (20.2%), bird watching or observing wildlife (16.9%), camping/RV stay (10.6%), and events/festivals (10.1%). Events and festivals were followed by spa (8.1%), golfing (7.5%), mountain/road biking (6.8%) and rock climbing (4.4%) was the least participated in activity.
- Visitors to Camp Verde were most likely to visit Montezuma Castle/Well National Monument (51.0%), followed by out of Africa (38.5%), downtown Camp Verde (24.7%), Fort Verde State Park (17.4%), Cliff Castle Casino (16.0%) and the Verde valley Archeology Center (9.7%).
- In Clarkdale, visitors were most likely to visit the Verde canyon Railway (57.2%), Tuzigoot National Monument (44.7%), the Copper Art Museum (20.9%), the Clarkdale Arts & Entertainment District (13.0%) and Verde River Access points (10.2%).
- Visitors to Cottonwood, are most likely to visit historic Old Town Cottonwood (75.6%), Dead Horse Ranch State Park (21.5%), the Blazin' M Ranch Review (17.9%), the Old Town Center for the Arts (17.9%) or hike the Old Jail Trail (13.0%).
- Visitors to Jerome were most likely to visit the galleries and shops (72.5%), the historic/ghost town tours (58.1%), the Jerome State Historic Park (30.3%), wineries/tasting rooms (24.6%), and musical or special events (6.1%).
- Finally, visitors to Sedona are most likely to visit the Red Rock Scenic Byways and go to Oak Creek Canyon (58.4% respectively), followed closely by the, uptown Sedona (54.6%), and the Chapel of the Holy Cross (46.9%). The next sites were visited by less than half of all Sedona visitors. The Sedona Airport Scenic Overlook was visited by 37.8 percent of all visitors, followed by Tlaquepaque/Hillside area (33.6%), Slide Rock and/or Red Rock State Parks (33.1%), Red Rock Crossing (27.8%), various vortex sites (24.8%) and Sedona Resorts (19.8%). Palatki and /or Honanki Heritage sites (11.5%) and the Sedona Heritage Museum (9.5%) received the lowest visitation in the Sedona area.
- Visitors were asked to rate their overall satisfaction with their tourist experience in the Verde Valley on a 5 point scale where 1 is low and 5 is high. Individually, the highest rating was for the quality of attractions, which rated 4.6 out of a 5 point scale, followed by the quality of activities in the Verde Valley, the quality of accommodations and the quality of visitor information, which scored 4.5 respectively. The next highest score was for the quality of food and drink available in

the Verde Valley which scored 4.4, followed by entertainment available and the quality of shopping, scoring 4.1 on a 5 point scale. The cost of goods and services received the lowest overall score, 3.9 out of 5. Overall the composite score for all the experience categories is 4.3 out of 5.

- Visitors from 42 US states (61.7%) provide the majority of visitors in the first quarter, followed by Arizona visitors (28.1%) and international visitors (10.2%).
- The Verde Valley received visitors from 42 of the 50 US states. Arizona (33.6%) provided the single largest cohort of visitors, followed by Wisconsin (9.7%), California (8.9%), Michigan (4.2%), Illinois (3.8%), Washington (3.6%), and New York (3.0%). The top five domestic origins account for 33% of total domestic visitors.
- Maricopa County (69.0%) provides the largest number of Arizona visitors to the Verde Valley. Within Maricopa County, the top five cities of origin for Verde valley visitors are Phoenix (23.4%), Scottsdale (7.2%), Glendale (6.0%), Peoria and Mesa (5.4% respectively), accounting for 47.5 percent of Maricopa County Visitors.
- Canada accounts for 88.5 percent of all international visitors to the Verde Valley, followed by the United Kingdom (3.3%). These two countries account for 89 percent of all international visitors to the Verde Valley.
- The average party size (mean) is 1.5 women and 1.3 men, with the median party size of 1 and 1 respectively. The average number of children under 18 is 1 child, however, only one-fourth of all parties (25.7%) are traveling with children.
- The average age of visitors to the Verde valley is 53.7 years (median 58.0 years).
- A majority of visitors are traveling as family only groups (61.1%), or family and friends (25.0%), with only 10.0 percent traveling as friends only, and 3.6 percent traveling alone.
- The average annual household income of visitors to the Verde valley (from mid-points) is \$88,569. One fifth of visitors in the second quarter had annual household incomes in excess of \$150,000 while a further one-third (35.3%) had annual household incomes of less than \$50,000.