

# Yuma Winter Visitor Study

2017 – 2018 Season

**ASU**  
**Center for  
Sustainable  
Tourism**  
**Arizona State  
University**



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# Yuma Winter Visitor Study 2017 – 2018 Season

## Executive Summary

### Introduction and Purpose of Studies

The Arizona Office of Tourism (AOT), as part of the Cooperative Marketing Program, offers partial funding for *Visitor Intercept* Studies, as a research option with the intention of improving marketing intelligence. A visitor is defined by AOT as someone who has traveled 50 or more miles to a community. Visit Yuma and Yuma County were interested in a study of winter visitors, a.k.a. “Snowbirds,” who travel to the area around the months of December to May. A **winter visitor** is defined as staying in Yuma 30 days or longer. A set of four studies were conducted to locate and intercept winter visitors– at the Visit Yuma Information Center, at select events, at RV parks, and as seasonal homeowners, including mobile homes and RVs parked on owned lots. Sampling for this study did not occur at hotels, apartments, short-term rentals, or campgrounds. All four studies screened out full-time Yuma residents, but did study **winter tourists** in Yuma who stayed less than 30 days. Results for both winter visitors (main part of report) and winter tourists (reported in Appendix B) are provided in the report. Given the sampling, some tourists who were day visitors, snowbirds transiting through Yuma County, those staying at hotels, or those using other lodging or residency options, are included in the results, but are most likely in tourist data, not winter visitor data. The population estimate for those who are visiting Yuma County during a December to May timeframe is 71,000 individuals or 35,500 travel parties (using 2-person travel party). This estimate is based on Visitor Information Center (VIC) counts and data on residency. While counts were adjusted to reflect the found proportion of visitors who visit the VIC, this estimate may still be low due to how visitors are counted or survey response bias (i.e. people who are likely to visit the VIC may also be more likely to participate in the survey). This estimation technique was largely used to estimate RV park and camping use levels as accurately as data were available.

### Key Findings

#### *Seasonal Home/Mobile Owners*

Almost ten thousand (N=9,805) properties are seasonal homes or mobile units on owned lots in Yuma County according to the 2017 (late fall) tax assessor’s database. This list is comprised of 5,900 (60%) homes and 3,905 (40%) mobile homes on owned lots, of which 9,632 are in some type of subdivision. In total, 1,054 randomly selected owners were sent a survey and 349 surveys were completed. For those who replied, 82% (n=284) visited Yuma County in the winter 2017-18 for 30 days or longer, 8% (n=29) visited for less than 30 days, 6% (n=22) indicated not visiting in 2017-18 and 4% (n=14) did not provide enough information to accurately establish length of Yuma stay. Outside of respondents, we estimate that 10% of the sample moved away and were not reached (known through returned bad addresses), and some deaths were reported to us, or seasonal homeowners reported to us that they became full-time

residents in recent months. Population estimates from the tax assessor's database are that seasonal homes are 87% U.S. primary residents and 13% international, with most international seasonal homeowners from Canada.

On average, home/mobile owner **winter visitors** (30+ days) stayed 145 nights (mean) in Yuma County) and their travel party was about 2.4 adults (mean). The month of arrival most common for winter visitors was October (34%); and the departure month April (57%). Their primary residency (according to question on the survey) is WA (30%), OR (16%), and ID/AZ (9% each) based on a mailing to just U.S. seasonal homeowners.

**Winter tourists** (<30 days in Yuma) who own a home or mobile stayed 9 nights (mean) in Yuma County in 2017-18 and their travel party was 2.2 adults (mean). The month of arrival most common for winter visitors was December (26%); and the departure month was January (25%). Their primary residency (according to a question on the survey) is CA (38%), AZ (14%), and OR/WA (10% each) based on a mailing to just U.S. seasonal homeowners.

The **economic impact of seasonal homeowners** is estimated for 9,154 households who visited their owned home/lot in Yuma County in 2017-18. The direct spending of this population is \$40.3 million and averaged \$4,406 per travel party. These expenditures represent spending in Yuma County during their stay and do not include expenses incurred for the full year. Property taxes, medical expenses, and other types of expenses related to their home (rather than their "visit") are not or are less likely to be included. This level of spending by seasonal homeowners is estimated to have created 706 jobs, \$20.2 million in labor income, \$29.3 million in value added, and a total economic impact (output) of \$49.5 million in Yuma County. This spending creates \$4.3 million in state and local taxes and \$4.2 million in federal taxes.

### ***RV Park Guests***

In addition to these owned properties, 15,486 leased lots in 44 RV parks attract winter visitors and tourists. No data are available to estimate total nights of sold lots, turnover, or occupancy rates of RV parks. Using a list of RV parks who are members of Visit Yuma, four parks (1,708 lots or 11% of all lots) were willing to distribute surveys to their customers during the 2017-18 season. In total, 305 surveys were completed with 88% (n=268) staying in Yuma 30 days or more; 7% (n=26) staying less than 30 days, and 5% (n=11) did not provide enough information to accurately establish length of Yuma stay. Those who stayed 30 days or more, i.e. **winter visitors**, averaged 118 nights and their travel party was 2.1 adults. October and November (each about 25%) were the most common arrival months for RV winter visitors and March and April (each about 46%) were the most common departure months. For the U.S. residents (about two-thirds of the sample), their primary residency is WA (20%), ID (12%), OR (11%), and AZ (9%). About one-third of all the RV winter visitors came from Canada.

For those who stayed less than 30 days, i.e. **winter tourists**, they averaged 10 nights and their travel party was 2.6 adults. January (25%) was the most common arrival month for RV winter tourists and February (26%) the most common departure month. RV winter tourists

came from a variety of states, including IA, MT, ID, AZ, CA, OR and WA (in roughly equal amounts). Almost one-quarter (23%) of RV-using winter tourists are from Canada.

The **economic impact of RV park winter visitors** is estimated for 22,000 RV travel parties in Yuma County in 2017-18. The direct spending of this population is \$138.7 million and averaged \$6,305 per travel party. This level of spending by RV park winter visitors created 4,027 jobs, \$141.3 million in labor income, \$231.1 million in value added, and total economic impact (output) of \$403.3 million in Yuma County. This spending creates \$36.3 million in state and local taxes; and \$30.7 million in federal taxes.

### **Additional Efforts to Study Winter Visitors and Tourists**

Similar to other Yuma tourist studies, visitors were intercepted at the Visitor Information Center (VIC) and three events to profile their interests and behaviors. Some VIC respondents indicated staying at a home or mobile they own (21%), a lease RV park (26%), or an event (50%), which overlap with the other studies. Some event attendees indicated staying at a home or mobile they own (ranging from 13% to 26% across 3 events), a lease RV park (17% to 26% across 3 events), or visiting the VIC (23% to 31% across 3 events). Those who own a home or mobile were less likely to attend an event (less than 11%) or stop at the VIC (8%). Those staying in RV leased spaces were very likely to attend events (53% to 67%) or VIC (72%). With a design of four studies to reach winter visitors, samples were not 100% distinct, but this overlap of samples was expected. These percentages are considered generally low, thus suggesting that all efforts allowed us to capture a wider estimate of winter visitors and tourists.

### ***Visitor Information Center (VIC)***

During December, 2017 to May, 2018, Visit Yuma staff estimated 39,000 customers passed through their doors. Some are full-time residents who stop in. In total, 481 surveys were completed with 45% (n=215) were winter visitors (30 days or more in Yuma), 47% (n=224) winter tourists, and 8% (n=42) did not provide enough information to accurately establish length of Yuma stay. **Winter visitors** intercepted at the VIC stayed in Yuma, on average, 92 nights, whereas tourists stayed 7 nights. Winter visitors were in groups of 2.5 people; winter tourist groups were 2.9 people. **Winter visitors** were most likely to be staying at a rented space at a RV park or home/mobile property (69% of VIC visitors). **Winter tourists** were most likely to be staying at a hotel or motel (46% of VIC visitors), followed by RV (34%, owned land or lease RV park) and camping (12%) on public land or commercial.

### ***Events***

Popular winter events in Yuma attract residents, winter visitors and winter tourists. Event organizers and Visit Yuma estimate the Medjool, Lettuce and Midnight at the Oasis attract 5,500, 4,000 and 40,000 attendees, respectively. In total, 314 surveys were completed of only nonlocals at these events, 81% (n=254) were winter visitors (30 days or more in Yuma), 18% (n=56) were winter tourists and 1% (n=4) did not provide enough information to accurately



establish length of Yuma stay. **Winter visitors** intercepted at events stayed in Yuma, on average, 107 nights, whereas **winter tourists** stayed 9 nights. **Visitors** were in groups of 2.7 people; **tourists** 4.9 people. **Visitors** were most likely to be staying at a rented space at a RV park or Home/mobile property (50%). **Tourists** were most likely to be staying at a hotel or motel (33% of event attendees), followed by RV (28%, owned land or leased RV park), camping (28%) on public land or commercial, and 19% stayed at a private residence of a friend or relative.

***Executive summary submitted by the Center for Sustainable Tourism, ASU, on February 28, 2019***

***Drs. Woojin Lee and Christine Vogt, Jada Lindblom***

## **Yuma Winter Visitor Study 2017 – 2018 Season**

### **Introduction and Research Focus**

This 2017-18 winter visitor study aimed to target those places in Yuma County Arizona where winter visitors most likely could be surveyed, particularly those staying a longer time period in the county. The previous 2015-16 University of Arizona study targeted those who stayed in a hotel across a full year. The U of A researchers estimated 800,000 or so travel parties stayed in a hotel over a 12-month with 45% in the peak winter visitor months of January to March, as well as in April and May. Only 1% of visitors during that time period stayed in Yuma County longer than 30 nights. Therefore, a study delimited to winter visitors was needed to complete a more robust estimate of tourism economic impact in the county.

We considered where to find winter visitors, first examining where visitors live seasonally or stay overnight. Yuma County has many commercial overnight recreational vehicle (RV) parks consisting of both leased and owned lots with electric and water hookups and a range of amenities including leisure programming and athletic facilities such as golf courses, pools and tennis courts. Another place where winter visitors may stay are in sited houses and mobile homes that they own but live in part of the year, mostly for Arizona's warm winter season. Yuma County has many hotels and motels and they may host some winter visitors (or winter visitors' guests, as suggested by the U of A study finding that during the January to March period, 21% of hotel guests were visiting friends and relatives who were winter or full-time residents). Other places that were discussed but deemed hard to study were short-term rentals and dispersed camping. Thus, the primary focus of the study was to contact those on the county's tax assessors list and RV travelers staying in RV parks. While those who stayed in Yuma County for 30 days or longer during a winter time period was the primary focus, we were also interested in understanding winter tourists or "snowbirds" who stay less than 30 days. To identify this population, two types of places were considered for additional surveying: Yuma's Visitor Information Center (VIC) and community events and festivals staged during the winter season. By surveying at the VIC, we were able to determine the market size of winter visitors (30 days or more) compared to winter tourists (less than 30 days). Importantly, a VIC based population estimation protocol can provide Visit Yuma with an annual research protocol to continue studying some key factors related to winter visitors. The events survey can also be an easy method to occasionally study winter visitors. Economic spending is more difficult to study and primary data are best collected from visitors toward the end of their visit or stay.

Following discussions with Visit Yuma, Yuma County and the Arizona Office of Tourism, we established the following research questions:

#### *Primary question:*

What is the economic impact of winter visitors in Yuma County, AZ?

#### *Sub-questions:*

1. What are the demographics of these visitors and their travel parties?
2. When do most visitors arrive and depart? How long do they stay?
3. Which activities, lodging, and transportation do snowbirds prefer?
4. Are visitors satisfied with their experiences in Yuma?
5. Are visitors coming back to Yuma in the future?
6. What more could Yuma offer to attract visitors or gain repeat visitors?

## **Overview of Methodology**

### **Background**

The study used quantitative and qualitative survey data to assess winter visitors' demographics, travel preferences and behaviors. Data were collected with four samples with the goal of reaching "snowbird" winter visitors who spend the winter in Yuma County. Several formats of questionnaires were used with the intent of measuring length of stay, places visited and activities participated in, money spent while in Yuma County, and feedback regarding Yuma as a winter "snowbird" destination. The instruments were designed to provide insights to help inform planning, tourism marketing strategies, and the improvement of travel offerings, services, infrastructure, and overall visitor experience in Yuma.

### **Questionnaire design**

ASU developed two primary survey instrument templates (a short version for intercept sampling and a longer version addressing additional spending questions) from which five survey variations were derived, featuring minor adjustments to reflect the specific sample populations (Table 1). Across four samples (Visitor Information Center/VIC, events, RV parks, and seasonal homeowners), over 1,500 surveys were returned to ASU. A fifth survey effort was attempted with VIC and event respondents to capture emails and then send a follow-up survey to received economic spending later in their trips or once home. With less than 200 emails obtained to send a follow-up, only 57 people responded to an email survey. This quantity of surveys was deemed too small of a sample to generalize an economic impact profile and the data were not used in the analysis.

The questionnaires reflected survey design standards that maximize reliability and validity of measures. The surveys included the following domains:

- Length of stay to identify population of interest (winter visitors or winter tourist)
- Patterns of behavior (prior visitation, future visitation, party size, length of stay, attractions visited)
- Consumer motives and interests
- Visitation decision-making (information sources utilized, internet and social media used, planning horizon)
- Economic impact (spending patterns across sectors, direct spending for estimated population)

- Satisfaction with/evaluation of the visit
- Revisit intention of Yuma in the future
- Demographics (gender, race, age, income, residence, etc.)
- Other items of interest to the community

The specific content of the questionnaire (variables and measures) was determined through discussion with appropriate community representatives. All research participants were informed of the goals of the study and were invited to participate on a voluntary basis.

**Table 1. Overview of surveys**

Survey	Visitor profile	Economic spending questions	Number of surveys distributed	Number of completed surveys received and captured or response rate
<b>Intercept at Visitor Information Center</b> (paper survey)	Center visitors who are <i>not</i> full-time Yuma residents (one respondent per travel party)	No	1,595 targeted	481 30% capture
<b>Intercept at events</b> (paper survey)	Event attendees who are <i>not</i> full-time Yuma residents (one respondent per travel party)	No	380 targeted	314 83% capture
<b>Follow-up to intercept surveys</b> (email)	Event attendees and visitor center visitors who provided email address	Yes	192 emailed based on email addresses provided from VIC and event n=795	57 7% capture and response
<b>RV park part-year residents</b> (paper and email)	Winter visitors staying at one of four participating RV parks (1 respondent per travel party)	Yes	1,000 targeted via email and by paper copies distributed by RV park mgmt.	305 30% response
<b>Seasonal homeowners (also referred to as Home/Mobile owners)</b> (mailed paper survey)	Property owners with out-of-county permanent addresses	Yes	1,054 households in U.S. received U.S.P.S. Mail	349 33% response

## **Analysis and segmentation**

With the focus of the study on winter visitors, once data were keyed, then survey responses were divided into two categories: winter visitors (visitors staying 30 days or more in Yuma) and tourists (visitors staying less than 30 days) using several questions that asked length of stay (are you a winter visitor for 30 days or longer with a yes/no response; number of years being an tourist in Yuma; arrive and depart date; total number of nights in Yuma County; and overnights during Yuma stay). Each of the four datasets were segmented into these two primary groups. Winter tourists' data were compiled and are placed in Appendix B of this report. The main body of the report only features winter visitor data, particularly the economic impact analysis.

All survey data were entered into SPSS software for statistical analysis. Open-ended questions were coded for recurrent themes and entered into word clouds for visual representation.

## **Limitations**

While this research aimed to address several of the limitations mentioned in previous Arizona snowbird research (see section Comparison of current and past visitor studies), a few limitations still emerged over the course of the research.

One limitation was that the seasonal homeowner survey was only mailed to U.S. addresses, although the original list did include many international addresses (13% of total list, i.e. 1,300 out of 9,805, of which about 99% were Canadian and most others European). This delimitation was for budget and timing reasons. Since our sampling frame included event and Visitor Center patrons, we were still able to capture data from international winter visitors from our other surveys.

A second limitation of our surveying was that Visitor Center and event attendees may overrepresent a certain type of visitors (perhaps more active and/or more social). Combined sampling via the RV park and seasonal homeowner list was intended to ameliorate this potential effect. Visitor Center and event attendee intercept studies are typically best for shorter surveys, so an abbreviated version of the full survey was distributed at the center and at events. This was followed up with an email survey to answer remaining follow-up questions (mainly pertaining to spending). Many participants did not include email addresses or did not respond to our follow-up request, so the range of data from Visitor Center and event attendees is more limited.

A third limitation of this research was the necessity to access RV park and mobile home guests via park management. Some park staff were more responsive and engaged than others, leading to somewhat uneven response rates across the four parks.

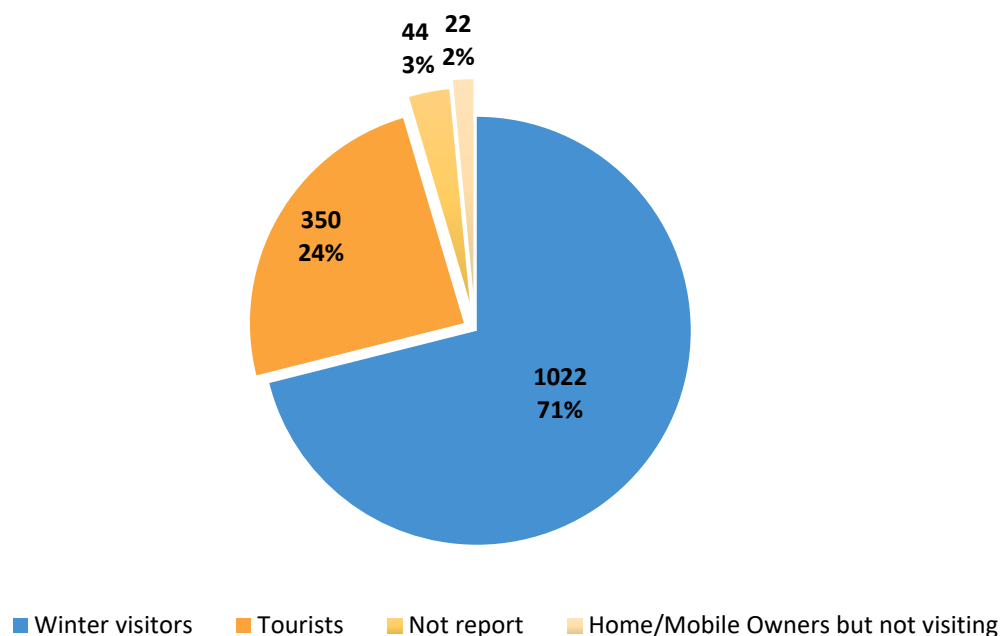
A fourth limitation is that we learned while speaking with residents over the course of this research that a seemingly growing number of seasonal visitors may own vacant lots (outside of RV parks) which they use for long-term RV parking. Our mailing list of property owners only included lots with built improvements. Future research should perhaps include vacant lot property owners as well, if it is believed that this phenomenon may be present.

Some additional limitations to the research are described in Appendix A.

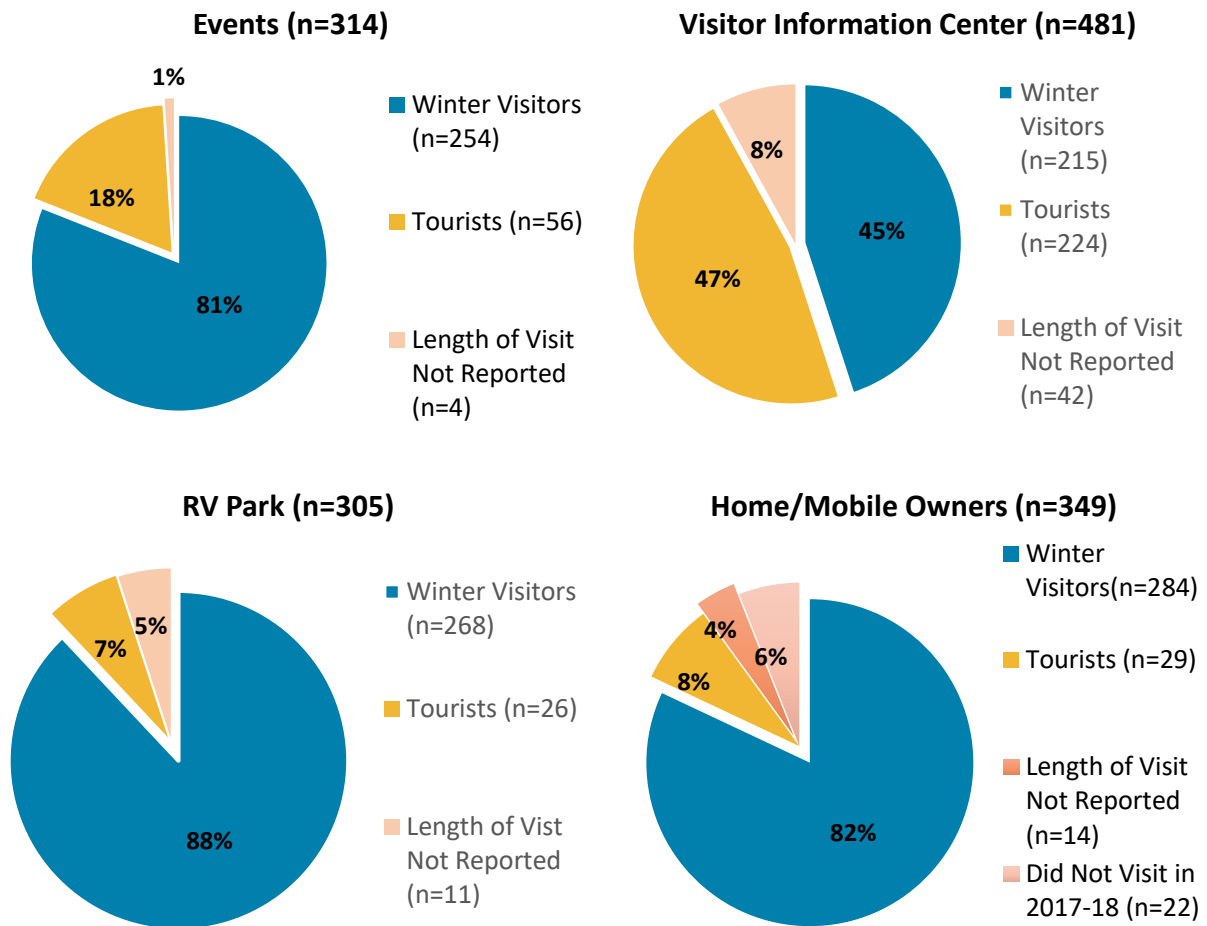
## Winter Visitor and Tourist Proportions

This study was intended to profile winter visitors in Yuma County. Winter visitors are defined as those visitors who stayed in Yuma County for 30 days or longer during a winter/spring season. Those who stayed less than 30 days are defined as winter tourists. As presented in the methodology section of this report, four distinct studies were conducted to best reach winter visitors. The seasonal homeowner study (also referred to in this report as home/mobile owners) was able to estimate those who did not visit Yuma in the 2017-18 season, whereas the other studies were conducted with those who had travelled to Yuma County.

From a total of 1,505 surveys returned, 1,438 surveys could be accurately placed into visitor and tourist groups. Figure 1 shows that 71% of completed surveys were classified as winter visitors, 24% as winter tourists, 3% as those who did not report their length of stay, and 2% as those who are home/mobile owners but did not visit during the report period. Figure 2 shows a further segmentation of winter visitors and winter tourists for the four samples. The percentage of winter visitors and tourists varies by segmentation. There were high percentages of winter visitors among event attendees (81%), residents at RV parks (88%), and Home/Mobile Owners (82%). At the Yuma Visitor Information Center less than half of the respondents (45%) were winter visitors.



**Figure 1. 2017-2018 Yuma County survey respondents classified as winter visitors and tourists**



**Figure 2. Proportion of 2017-2018 winter visitors (30+ days) compared to tourists (less than 30 days) by sample**

## Winter Visitor Demographics

Figures 3 to 6 and Table 2 provide demographic results for Yuma County winter visitors. Findings are shown for each of the four studies and where available, these findings are contrasted to U.S. Census demographic data for full-time Yuma County residents.

The most common age group of winter visitors in Yuma was 65-79 years old (Figure 3). Nearly two-thirds of the respondents in segments of event attendees, visitors at the Visitor Information Center, RV parks and home/mobile owners belonged to this age group. The second most common age group was 50-64 years old. It should be noted that the home/mobile owner respondents showed the highest percentage of the oldest age group, 80+ years old, followed by the respondents at the Visitor Information Center. The age group with the fewest respondents



was less than 35 to 49 years old (1% or 0% of response rate). In comparison to full-time residents reported in the Census data, Yuma winter visitors are much older.

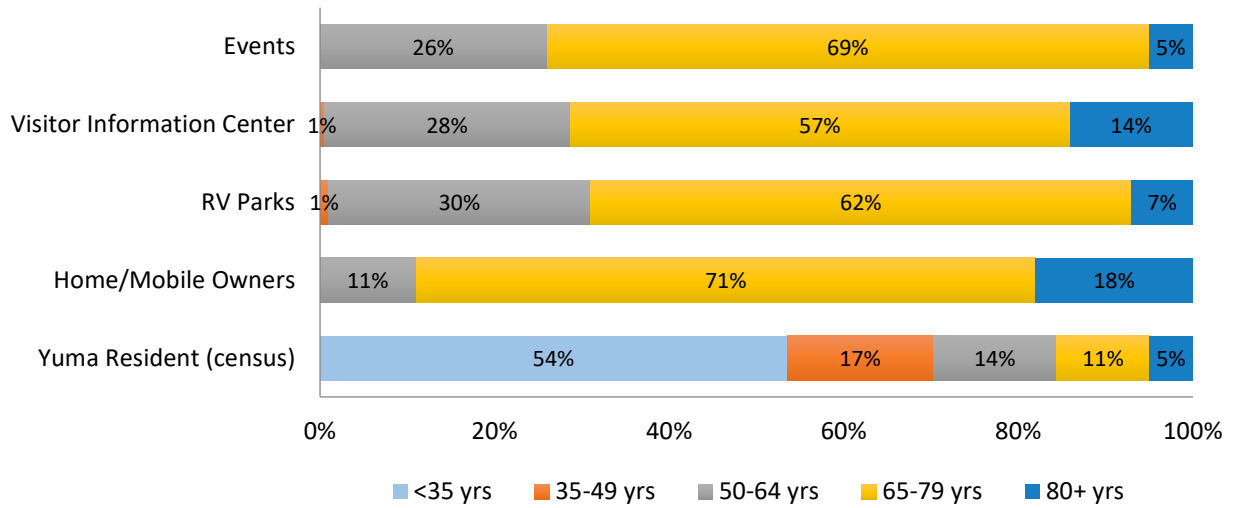
Female was the dominant gender of respondents for the Event (62%) and Visitor Information Center (55%) samples (Figure 4). The gender ratios were balanced among respondents from the RV parks and home/mobile owners, which were similar to the gender distribution in the Yuma full-time population.

As demonstrated Figure 5, an increasing number of Yuma winter visitors responding to the survey attended some college (RV park: 24%; home/mobile owner: 32%) and fewer reported having no high school diploma (RV park: 4%; home/mobile owner: 2%). Respondents who earned a bachelor's degree consisted of 16% of RV park visitors, and 15% of home/mobile owners. Furthermore, 17% of RV park visitors and 12% of home/mobile owners reported having a graduate or professional degree.

In general, Yuma winter visitors were more educated than their counterparts in the Yuma full-time population. As shown in Figure 5, only 4% of the RV park visitors and 2% of home/mobile owners did not have a high school diploma as compared to 11% of the Yuma County full-time population. Our respondents at RV parks (23%) and at their home/mobile properties (14%) were more likely to hold an associate's degree than the Yuma full-time population (8%).

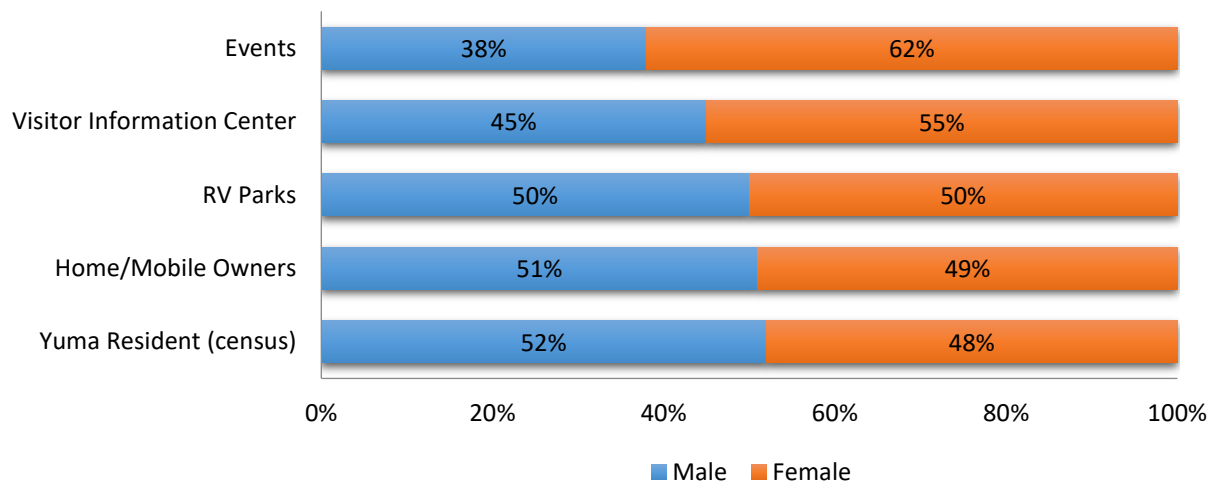
A majority of winter visitors who stayed in Yuma were not working and only a small percentage of the people responded that they were still working during their stay in Yuma (Table 2). The table shows that less than 5% of respondents of winter visitors in the event, RV parks and home/mobile owner samples indicated that they were working full-time or part-time or remotely.

Figure 6 highlights that the Yuma County winter visitors is predominately white. Home/mobile owners were slightly more likely to be white (98%) compared to winter visitors who stayed in RV parks (92%).



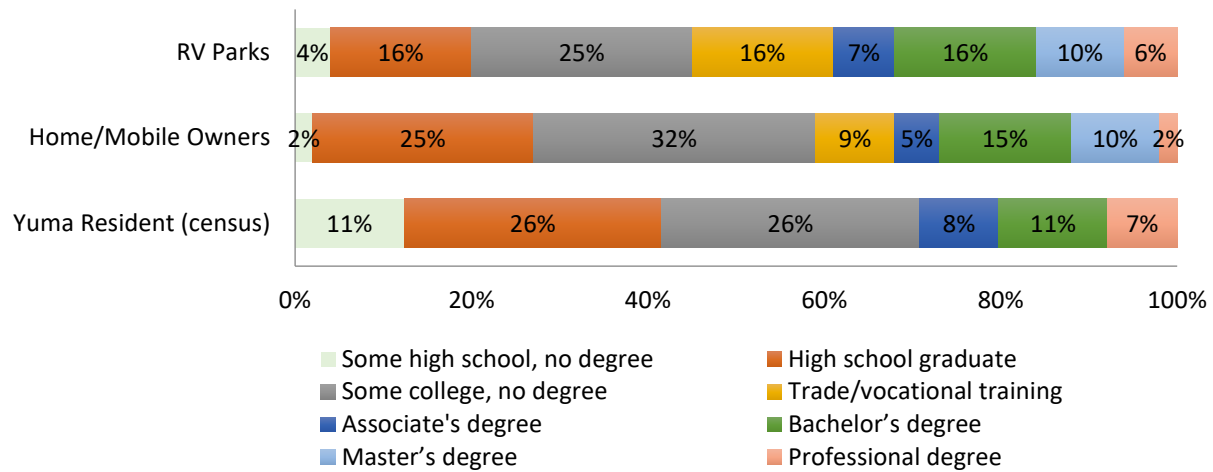
(Data for Yuma Resident (census) are based on the 2016 American Community Survey)

**Figure 3. Age of winter visitors**



(Data for Yuma Resident (census) are based on the 2016 American Community Survey)

**Figure 4. Gender of winter visitors**

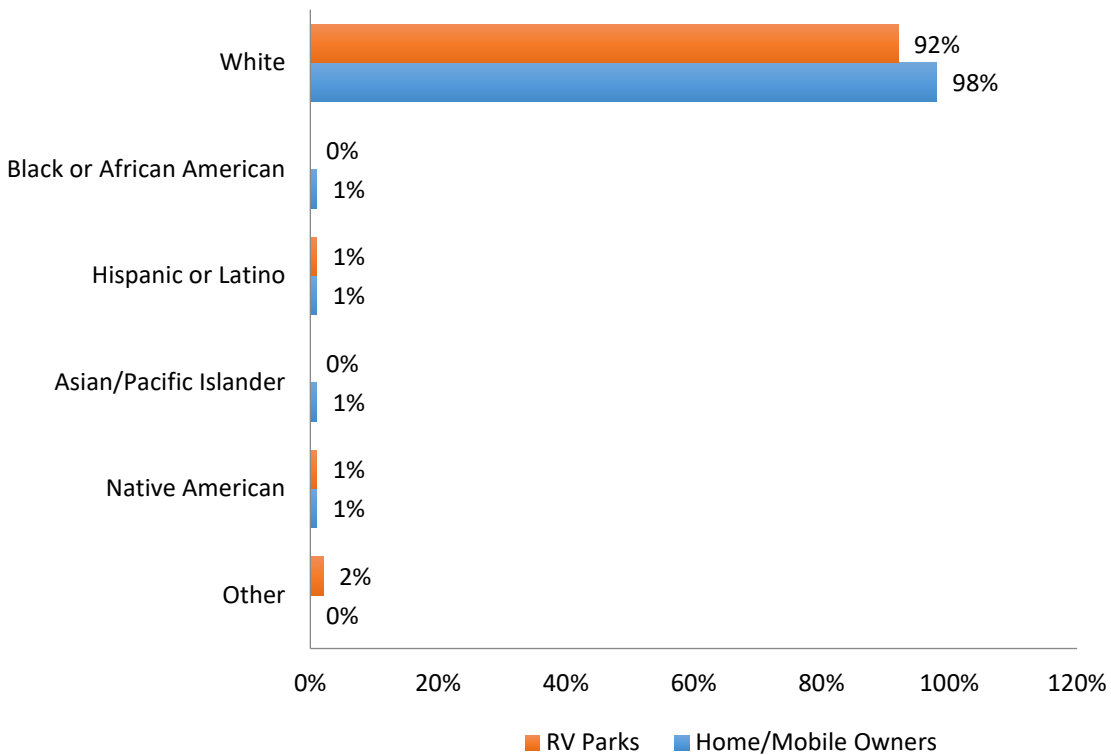


(Data were only collected at RV Park and Homeowner surveys,  
Data for Yuma Resident (census) are based on the 2016 American Community Survey)

**Figure 5. Education level of winter visitors**

**Table 2. Employment status of winter visitors (multiple responses allowed)**

		Visitor Information	RV	Home/Mobile
Retirement and Working	Events	Center	Parks	Owners
Retired	96%	90%	98%	98%
Working during stay in Yuma	3%	NA	11%	5%
Part or full time	2%	NA	4%	2%
Work remotely	1%	NA	2%	2%
Work - Other	0%	NA	2%	1%
Not report	0%	NA	3%	0%



*(Data were only collected at RV Park and Homeowner surveys)*

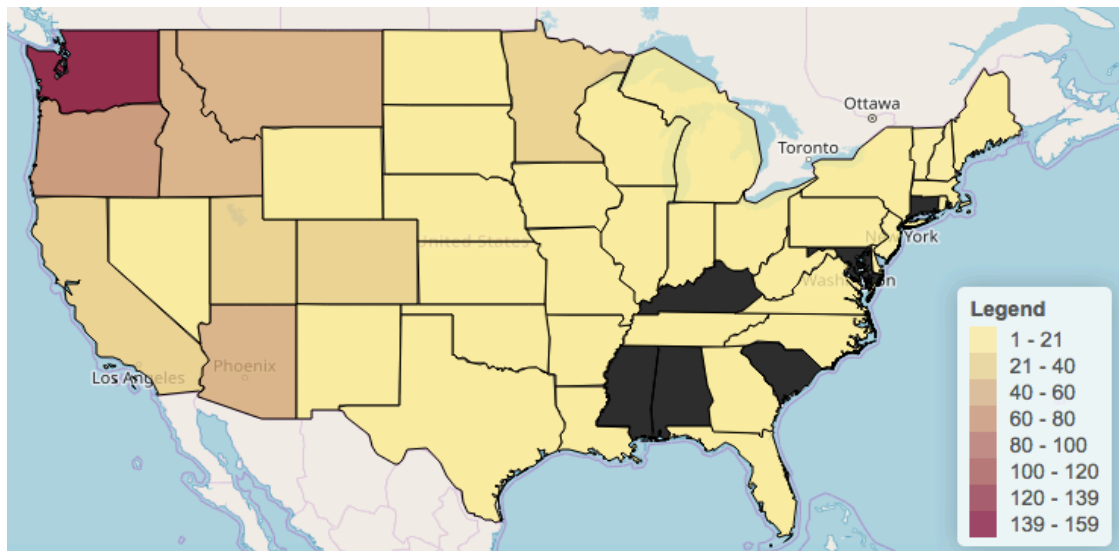
**Figure 6. Ethnicity of winter visitors**

## Winter Visitor Residency

Figures 7 to 10 provide residency results for Yuma County winter visitors and winter tourists. Findings are shown for the combined respondents of one of the four studies, with the exception of the two maps on home country, home/mobile owners studied were only from the U.S. because of constraints on sending foreign mail.

Not surprisingly, most winter visitors to Yuma County have primary homes in places with cold, snowy and/or rainy winters. By a substantial margin, the most winter visitor travel parties (across all samples) come from Washington state ( $n = 159$ ), followed by Oregon ( $n = 80$ ) and Idaho ( $n = 56$ ). Figure 7 provides an overview of visitation from all U.S. states. Considering winter visitors' country of origin (Figure 8), nearly all travel parties (across three samples, excluding the homeowner sample which was specific to U.S. residents only) come from the United States (63%) or Canada (37%). Less than 1% of winter visitors came from outside of North America. In contrast, the plurality of tourists to Yuma (visiting under 30 days, across all samples) were from California ( $n = 50$ ) followed by Arizona and Washington (each  $n = 24$ ), as is shown in Figure 9. These numbers suggest that geographical convenience may be an important factor of where people visit as tourists and also likely represent many visitors who stopped in Yuma because they were passing by as part of a larger road trip. From a global perspective, Yuma sees a higher number and more geographic variety of international visitors from outside

of North America within the tourist segment (Figure 10) than the winter visitor segment, but this proportion of non-North American visitors is still quite small (only about 2% of total tourists).



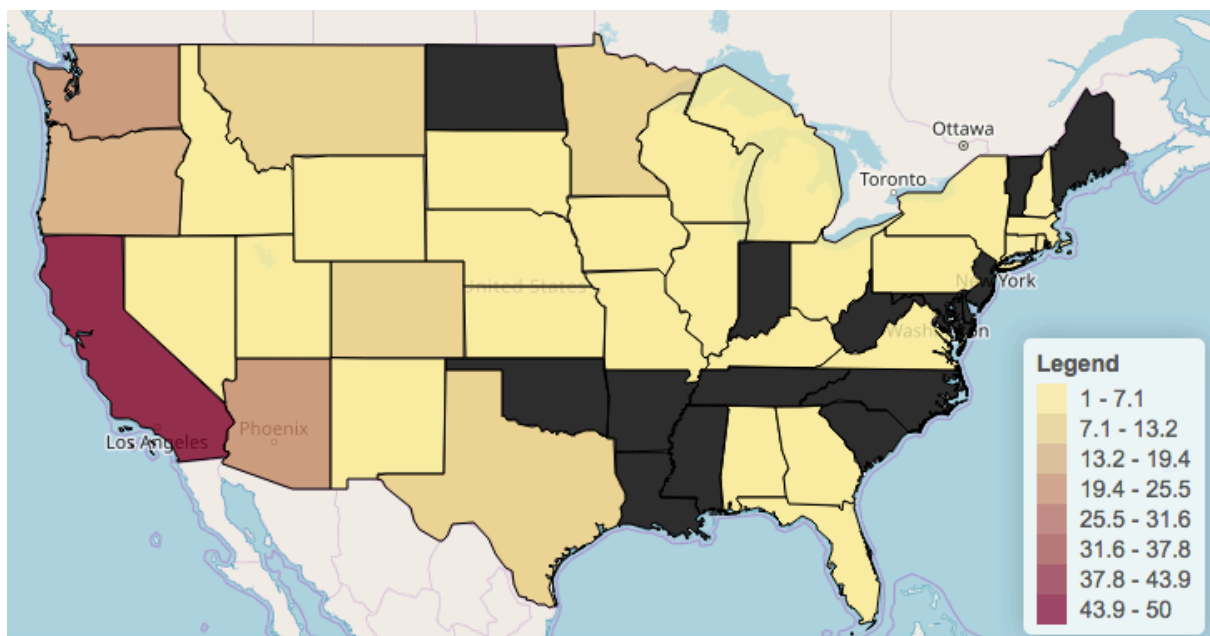
Not pictured: Alaska: 7 travel parties; Hawaii: 0.  
Dark grey represents states with no observed cases.

**Figure 7. Winter visitors' home states (all samples combined; by number of travel parties)**



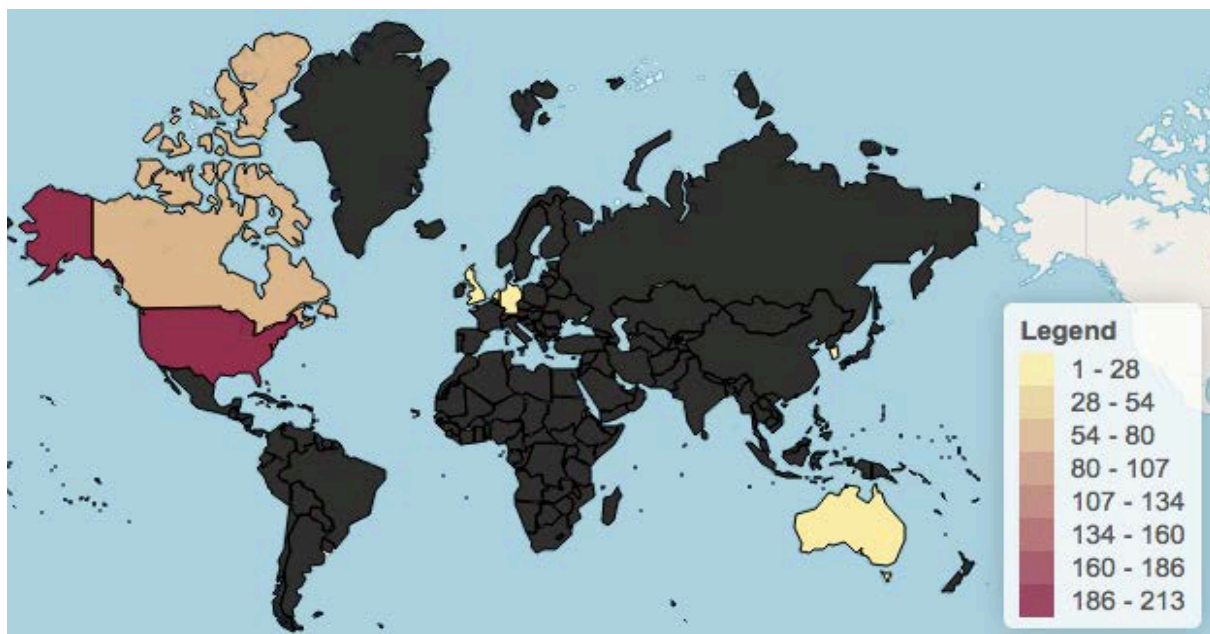
Note: Alaska and Hawaii's total is counted as part of lower 48, not separately.

**Figure 8. Winter visitors' home countries (3 samples; excluding homeowners survey)**



Not pictured: Alaska: 3 travel parties; Hawaii: 1.  
Dark grey represents states with no observed cases.

**Figure 9. Tourists' home states (all samples)**



Map program source in footnote.<sup>1</sup>

**Figure 10. Tourists' home countries (3 samples)**

<sup>1</sup>Heat map generator source: Sasha Babicki, David Arndt, Ana Marcu, Yongjie Liang, Jason R. Grant, Adam Maciejewski, and David S. Wishart. Heatmapper: web-enabled heatmapping for all. *Nucleic Acids Res.* 2016 May 17. doi:10.1093/nar/gkw419

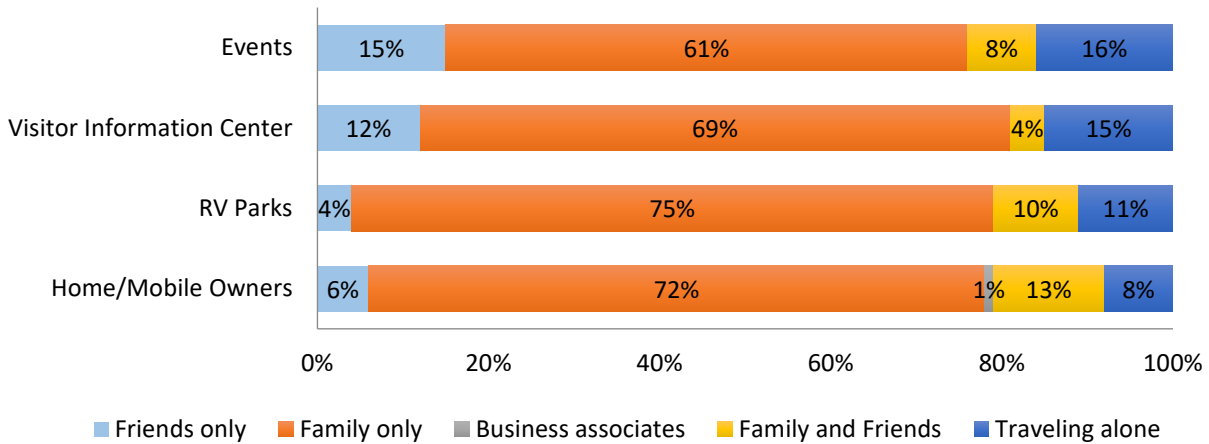
## Winter Visitors' Trip Characteristics

Figures 11 and 12 and Tables 3 and 4 provide results about trip characteristics. Findings are shown for each of the studies.

Winter visitors are primarily visiting or staying in Yuma County with their family. Approximately three-quarters of RV park visitors or home/mobile owners were with family (Figure 11) and only a few of these same types of visitors were in travel parties with friends during their visit. About one in ten are with family and friends in the RV park or home/mobile owner samples. Another one in ten were alone during their visit or stay. Table 3 shows the number of men, women, children and total group size of winter visitors. RV park visitors were the smallest size of group (2.1 persons) and event visitors are the largest group (2.7 persons). As expected, very few groups had children in their travel party, but a few did across all samples. In general, there were more women in these winter visitor travel parties than men.

Table 4 shows average lengths of stay as well as the percentage of visitors who arrived and departed each month. The average length of stay by number of days ranged from 92 (VIC sample) to 145 (home/mobile owners). October through January were all popular arrival months, with some variation in trends between sample groups. Most visitors departed in March or April. Additionally, visitors were asked whether they left Yuma and returned during any point of their stay. More than half of the winter visitor respondents stated that they did make overnight trips elsewhere during their winter stay (59% for both the home/mobile owners and RV parks samples). Respondents' destinations for these trips were varied, but commonly reflected top southwestern tourist destinations (e.g. Grand Canyon National Park and Las Vegas, NV), the nearest major U.S. cities (Phoenix, AZ and San Diego, CA), temporary returns back home, and trips across the border to Mexico, as well as many other regional and national destinations.

The number of years coming to Yuma County is valuable to understand whether Yuma is continuously attracting winter visitors for repeat visits. One-third (32%) of the VIC respondents indicated they came to Yuma for the first-time, on the other hand, only 1% of the respondents of home/mobile owners indicated that this year was their first visit to Yuma (Figure 12). Examining a longer history with Yuma County, 21% of the respondents from home/mobile owners indicated that they had come to Yuma for more than 21 years, but only 3% from the visitor information center reported coming to Yuma for 21 years. It is to be expected that the home/mobile owners would have fewer cases of new visitors, as visitors would be more likely to buy a home in Yuma once they were already familiar with the destination. RV park visitors were nicely spread across the years of visiting. There were 30% who had just a 2- to 5-year history of visiting Yuma County.



**Figure 11. Social characteristics of winter visitor travel parties**

**Table 3. Winter visitor travel party size**

Group size	Events	Visitor Information Center	RV Parks	Home/Mobile Owners
Total count of men	390	551	305	363
Total count of women	422	574	326	394
Total count of children	11	20	4	39
Total count of group members	823	1,145	635	796
Mean travel party size	2.7	2.5	2.1	2.4
Range of travel party size	1 to 6	1 to 42	1 to 20	1 to 16

Counts are based on tallied travel party members within each sample's responses.

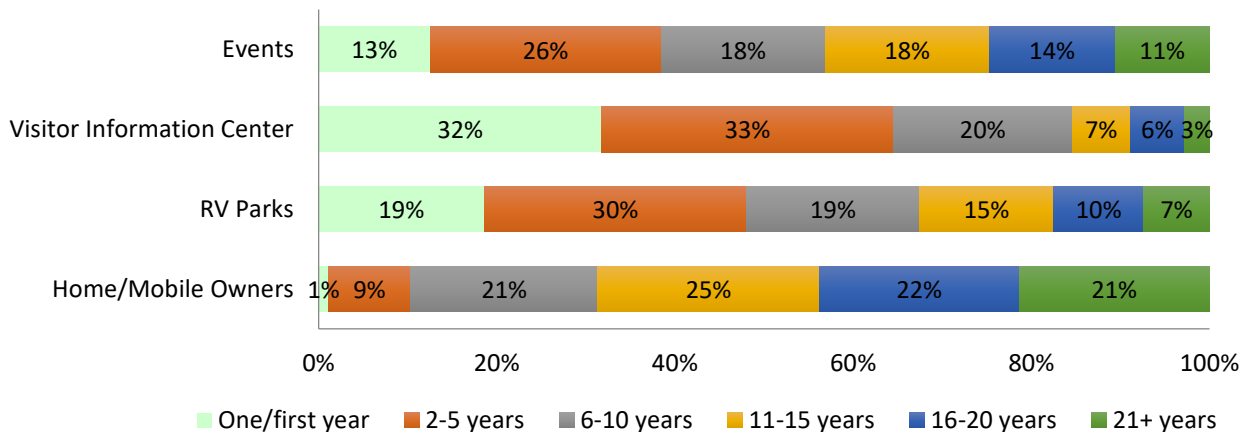


**Table 4. Length of stay and arrival/departure months**

<b>Length of stay (Number of days)</b>	<b>Events</b>	<b>VIC</b>	<b>RV Parks</b>	<b>Home/Mobile Owners</b>
Mean	107	92	118	145
Median	90	90	120	151
Range	30 – 369*	30 – 223*	30 – 242*	30 – 444*
<b>Arr. month/year (by % of visitors)</b>	<b>Events</b>	<b>VIC</b>	<b>RV Parks</b>	<b>Home/Mobile Owners</b>
<i>Total reporting (n)</i>	<i>247</i>	<i>209</i>	<i>266</i>	<i>283</i>
Jan 17	1%	0.5%	0.5%	0.5%
Apr 17	0.5			
May 17	1			0.5
Jun 17	0.5			
Aug 17				0.5
Sep 17	1	0.5	2	2
Oct 17	16	12	25.5	34
Nov 17	18	22	24	31
Dec 17	21	43	20	16
Jan 18	30	20	23	12
Feb 18	9	2	3	1.5
Mar 18	2		2	1
Apr 18				1
<b>Dep. month/year</b>	<b>Events</b>	<b>VIC</b>	<b>RV Parks</b>	<b>Home/Mobile Owners</b>
<i>Total reporting (n)</i>	<i>245</i>	<i>195</i>	<i>266</i>	<i>283</i>
Feb 17		0.5%		
Nov 17				0.5%
Dec 17		0.5	1%	0.5
Jan 18	1%	12	0.5	1
Feb 18	8	23	4	5
Mar 18	49	31	45.5	19
Apr 18	34	28	46	57
May 18	6	4	2	16
Jun 18	0.5	0.5	0.5	1
Aug 18		0.5		
Oct 18	1			
Nov 18	0.5			
Dec 18	1		0.5	

\*Some winter visitors/seasonal residents reported staying longer than the typical winter duration during the 2017-2018 season.

Blank cells represent months with no reported cases (0%).



**Figure 12. Number of years winter visitors have visited or stayed in Yuma County**

## Winter Visitors' Trip Experiences

Tables 5 and 6 and Figures 13 and 14 provide results about trip experiences. This includes information about leisure activities, attractions visited, transportation used during Yuma County visit or stay, and types of housing and accommodations used during visit or stay. Findings are shown for each of the studies.

Like many visitor studies, shopping rose to the top as the most popular leisure activity during a vacation or longer stay. Those intercepted at events were most likely to shop as a leisure activity (93%) in comparison to home/mobile owners (77%) (Table 5). Walking, hiking and biking (those activities done on trails) were the next most popular leisure activity participated in during their Yuma visit. Sightseeing or touring and visiting agri-attractions were also popular. Visiting casinos were popular for about half of the respondents, regardless of study sample. In general, visitors staying in RV parks appear more active in leisure activities than those who own a home/mobile in Yuma County.

Respondents were asked which attractions they visited or planned to visit during their stay in Yuma County. The most popular attraction for winter visitors was the historic downtown Yuma/Riverfront area (Figure 13), which was selected by 84% of the RV park respondents and 74% of Home/mobile owners. The second most popular attraction was Martinez Lake or Fisher's landing, which were visited by more than half of the respondents. Cocopah, Paradise or Quechan casinos were ranked as the third most popular attractions. Apart from these attractions, nearly one-third of RV park respondents indicated core attractions including Yuma Quartermaster Depot (30%), Imperial Sand Dunes NRA (27%) and Castle Dome Mines Museum (30%). The least popular attractions were the Sanguinetti House Museum and The Camel Farm. These two attractions were visited by 6 to 9% home/mobile owners.

The vast majority of winter visitors (more than 90% of the respondents) used their own vehicle for transport once they arrived in Yuma County (Figure 14). About one-third indicated

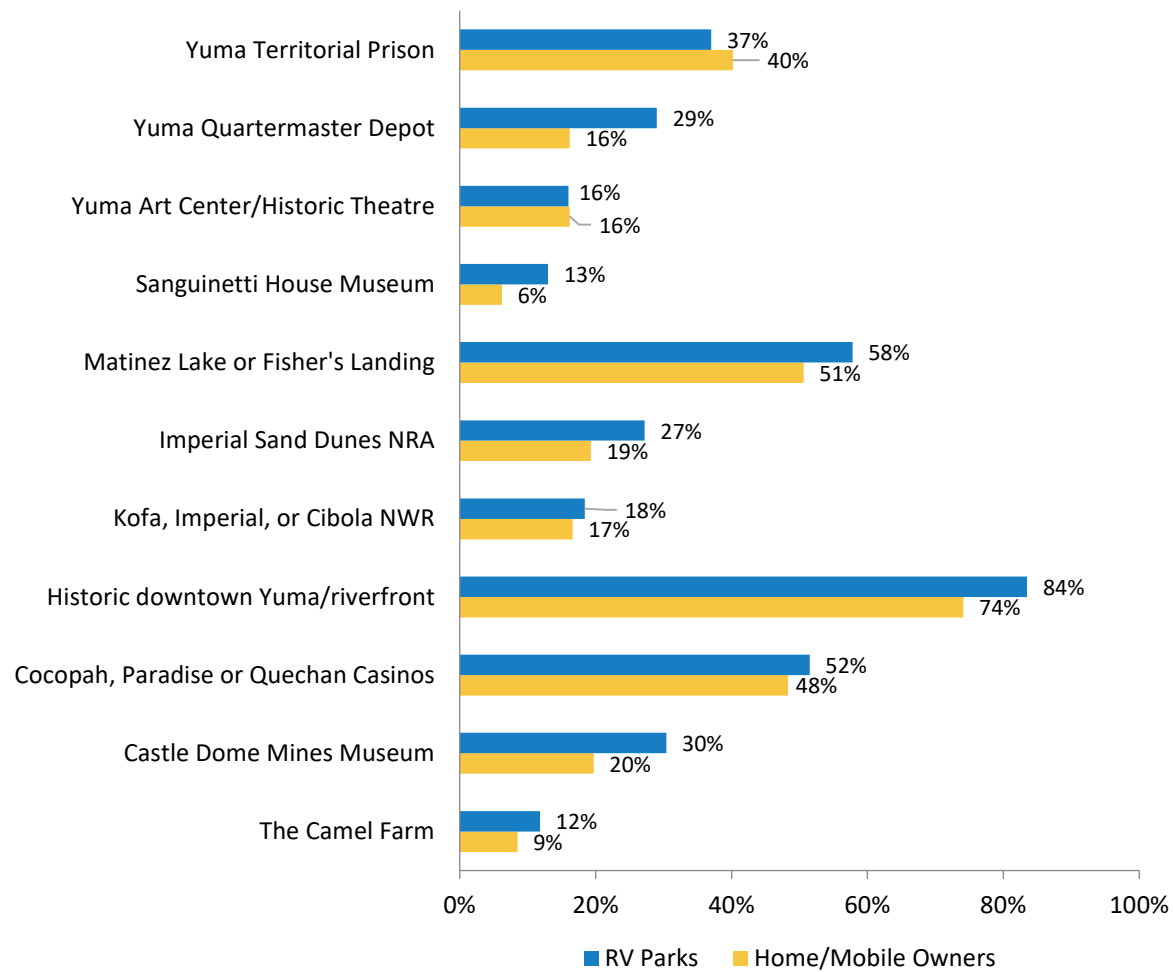
using their own RV, including those staying in RV parks. It appears that many visitors who arrive via their own RV may also pull a car and then use the car during their Yuma County visit. Very few indicated renting a car or RV during their stay.

The housing or accommodation types used by winter visitors are presented in Table 6. For home/mobile owners, 61% of respondents selected a 'second home' (61%) to describe their residence and 18% selected an 'owned space at a RV park or mobile home park.' About one-quarter (24%) of home/mobile owners selected 'owned space that is not in the RV park.' For RV park winter visitors, a majority indicated living in a rented space at a RV or Mobile home park (74%), 16% indicated owning a space at a RV park or Mobile home park, and 13% selected 'Campground' as their housing type. The event and visitor center samples provide a more diverse picture of housing or accommodation selection with a few in each of the samples indicating staying with family, renting, or staying at a hotel or motel.

**Table 5. Leisure activities participated by winter visitors (multiple responses allowed)**

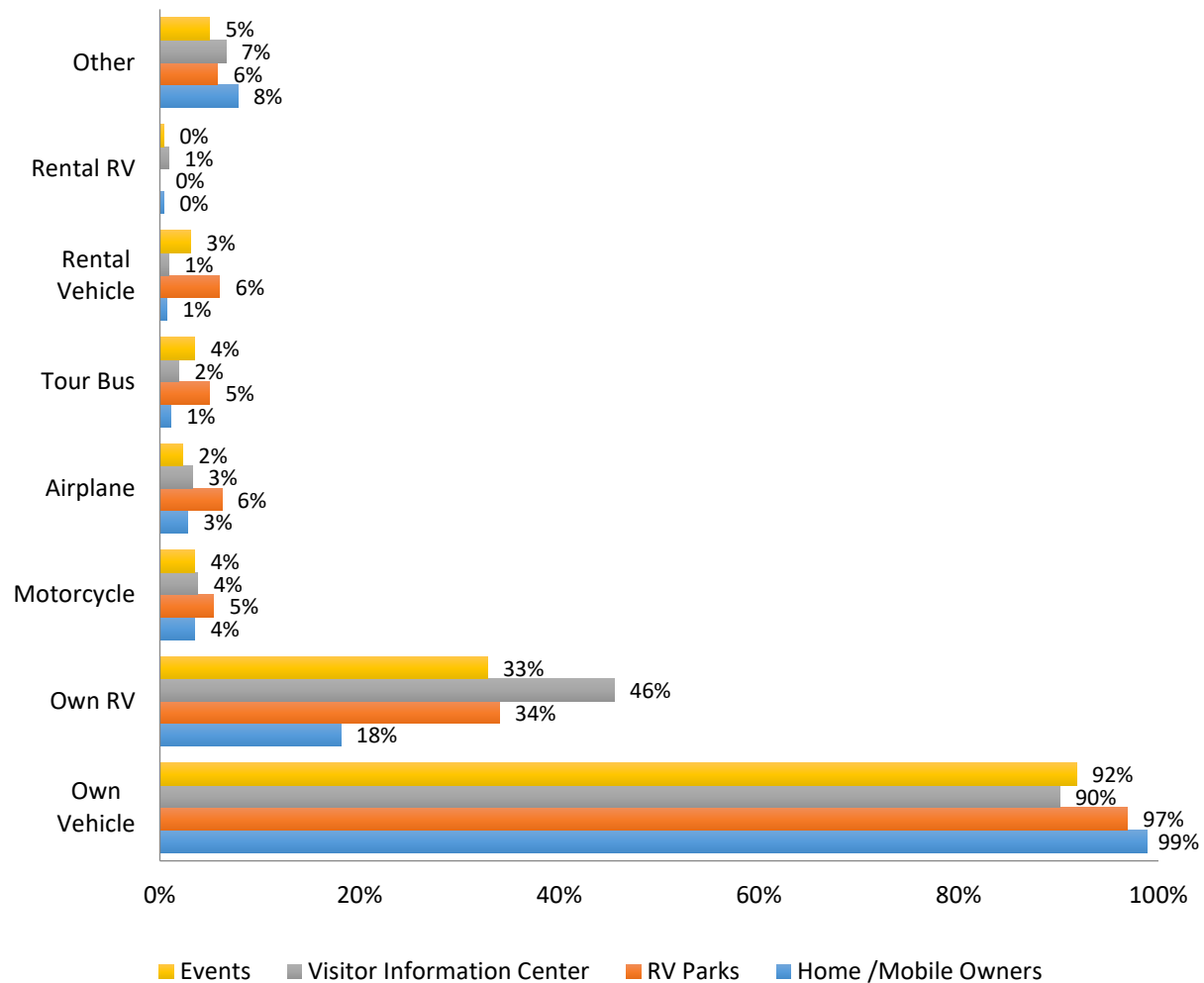
<b>Activities</b>	<b>Visitor</b>			
	<b>Events (n = 254)</b>	<b>Information Center (n = 215)</b>	<b>RV Parks (n = 268)</b>	<b>Home/Mobile Owners (n =285)</b>
Going shopping	93%	85%	83%	77%
Walking/hiking/biking	77	84	62	59
Sightseeing or touring	74	86	66	52
Farm or other agricultural attraction	69	N/A	59	52
Lettuce Festival	68	N/A	26	21
Visiting a casino	56	53	51	45
Live performance	56	51	63	34
Military site	55	N/A	50	46
Medjool Date Festival	54	32	16	13
Museum, art gallery	54	77	48	35
National, state or regional park	53	79	49	30
Midnight at the Oasis event	50	28	23	26
Yuma Visitor Information Center	47	100	25	21
A boat show, air show, car show	38	45	36	34
Golfing or golfing event	32	28	51	28
Welcome Back Winter Visitor Bash	26	20	15	16
ATV/OHV tour	16	21	19	38
A sporting event	15	20	15	11
Photography, painting	12	27	16	13
Boating	11	17	7	8
Motorcycle riding	4	7	4	5
Hunting	0	1	1	1
<i>Other activities</i>	<i>14</i>	<i>13</i>	<i>11</i>	<i>15</i>

N/A indicates not asked on the survey.



(Data were only collected at Home/Mobile Owner and RV Park membership)

**Figure 13. Attractions visited by winter visitors**



**Figure 14. Transportation used by winter visitors during their time in Yuma County**

**Table 6. Types of housing and accommodations used by winter visitors (multiple responses allowed)**

Types of housing	Events	Visitor Info. Center	RV Parks	Home/Mobile Owners
A rented space at a RV or mobile home park	50%	69%	74%	1%
Second home	17	12	4	61
Campground	12	10	13	0
An owned space at a RV or mobile home park	11	NA	16	18
Private residence of a friend	8	7	1	0
Rented apt, home, townhouse or condo	3	5	0	0
Other camping/Owned space not at RV park	2	NA	0	24
Hotel/motel	1	3	0	2

## Decision Making and Opinions

Tables 7 to 9 provide results about trip decision making and opinions about the Yuma County visit or stay. Findings are shown for each of the studies for decision making, but the opinion questions were only asked of the RV park and home/mobile owners due to length of the questionnaire.

When asked about the most important factor for visiting Yuma, the most common response was friends and/or family members are staying in Yuma (Table 7). Over half of home/mobile owners (58%) visited Yuma primarily for this reason. Word of mouth was the next most popular factor that influenced decision making. Weather is also important, particularly to RV park visitors (21%).

Very high ratings of Yuma County were given by RV park and home/mobile owners (Table 8). On a five-point agreement scale, almost everyone selected “agree” or “strongly agree” for questions about enjoyment, pleasure, and the destination appeal. Slightly more respondents selected “agree” over “strongly agree” when asked if Yuma County is the best destination to visit during the winter season. As shown in Table 9, similar results were found when asked if they would recommend Yuma County to others.

Table 9 also provides data on the likelihood to return next year or in 3 to 5 years. Over fifty percent of RV park visitors and home/mobile owners indicated that they would be back next year, with owners indicating slightly higher percentage rates (which makes sense, since they own).

**Table 7. Most important factor for winter visitors to visit or stay in Yuma County**

<b>Factors</b>	<b>Visitor</b>			<b>Home/Mobile</b>
	<b>Events (n = 246)</b>	<b>Information Center (n=200)</b>	<b>RV Parks (n = 265)</b>	<b>Owners (n=284)</b>
Word of mouth	36%	34%	27%	17%
Friends/Family members are staying in Yuma	30	29	30	58
Winter weather in Yuma area	15	4	20	12
Affordability of Yuma (or Cost of winter stay in Yuma)	3	6	6	5
Passing through/On a road trip	3	1	3	2
Available accommodations on RV/Mobile spaces	2	2	4	1
A previous trip to the area	2	6	4	3
Visit Yuma Visitor Guide	2	1	0	1
A travel or RV show	2	1	1	1
An advertisement	1	1	1	0
Website or travel literature from the Arizona Office of Tourism	1	1	0	0
A newspaper or magazine article	1	1	0	0
Visit Yuma Website (Yuma CVB)	0	2	0	0
Where we usually visit was impacted by natural disasters	0	0	1	0
A television or radio program	0	0	0	0
<i>Other</i>	3	8	4	2



**Table 8. Opinions about winter visitor experience in Yuma County**

Statements	Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree	Mean
<b>RV Parks</b>						
Yuma County is one of the best destinations I have ever visited as a winter destination	2%	2%	11%	53%	32%	4.1
I am pleased to have visited Yuma County	2	0	3	49	46	4.4
I enjoyed myself in Yuma County this winter season	2	1	2	42	53	4.4
<b>Home/mobile Owners</b>						
Yuma County is one of the best destinations I have ever visited as a winter destination	1%	2%	19%	46%	32%	4.0
I am pleased to have visited Yuma County	1	1	4	47	47	4.4
I enjoyed myself in Yuma County this winter season	1	1	6	41	51	4.4

Scale of 5 (1 – Strongly Disagree to 5 – Strongly Agree)

Data were collected from only Home/mobile owners and at RV parks.

**Table 9. Recommendation and return rate to Yuma County of winter visitors**

Statements	Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree	Mean
<b>RV Parks</b>						
I will say positive comments about Yuma County to others	2%	0%	3%	46%	49%	4.4
I will return to Yuma County next year	3	4	7	27	59	4.4
I will return to Yuma County in the next 3-5 years	2	2	14	34	48	4.2
<b>Home/mobile Owners</b>						
I will say positive comments about Yuma County to others	1%	0%	5%	45%	49%	4.4
I will return to Yuma County next year	1	1	2	32	64	4.6
I will return to Yuma County in the next 3-5 years	2	2	4	30	62	4.5

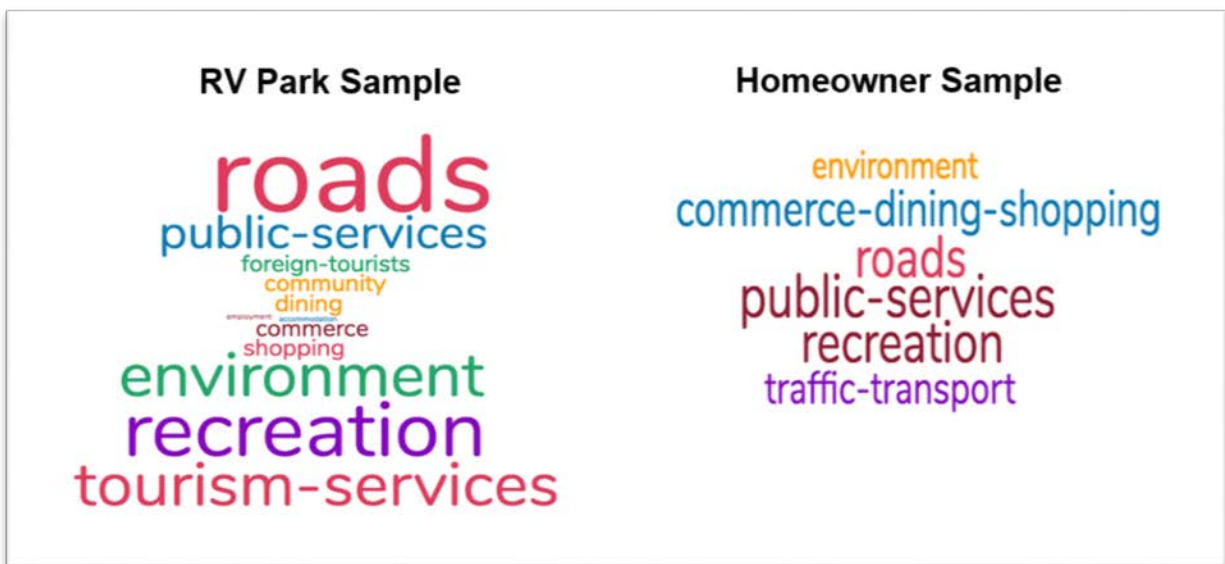
Scale of 5 (1 – Strongly Disagree to 5 – Strongly Agree)

Data were collected from only home/mobile owners and at RV parks.

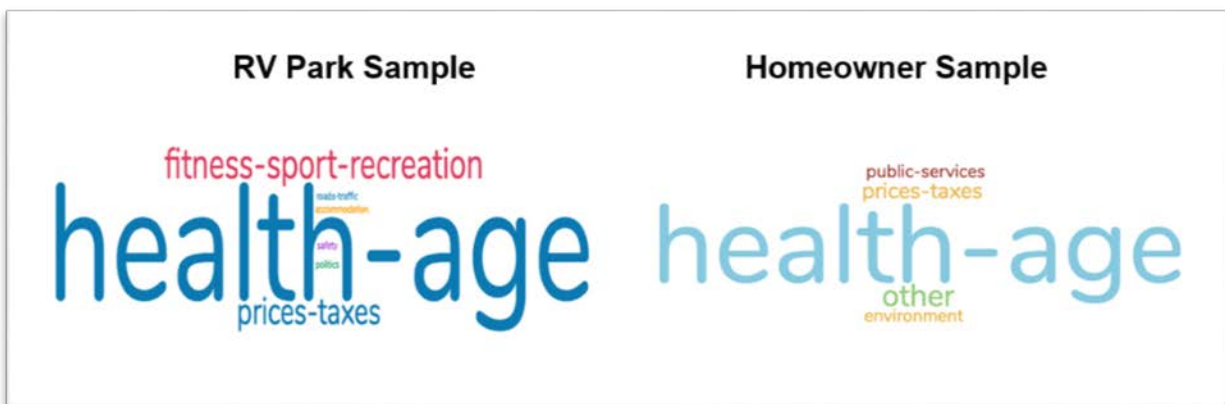
## Open-Ended Question Responses

Participants from the RV park and homeowner samples were asked open-ended questions regarding ways their stay in Yuma County could be made better, factors that might hinder their return to Yuma County as a primary vacation destination or seasonal residence in the future, and whether there were any public or private facilities that they would particularly like to see developed in Yuma County. The word clouds shown in Figures 15 to 17 display the common themes that emerged within responses. The larger words represent themes that occurred more commonly amongst the responses. A complete list of the open-ended responses for both samples may be found in Appendix C.

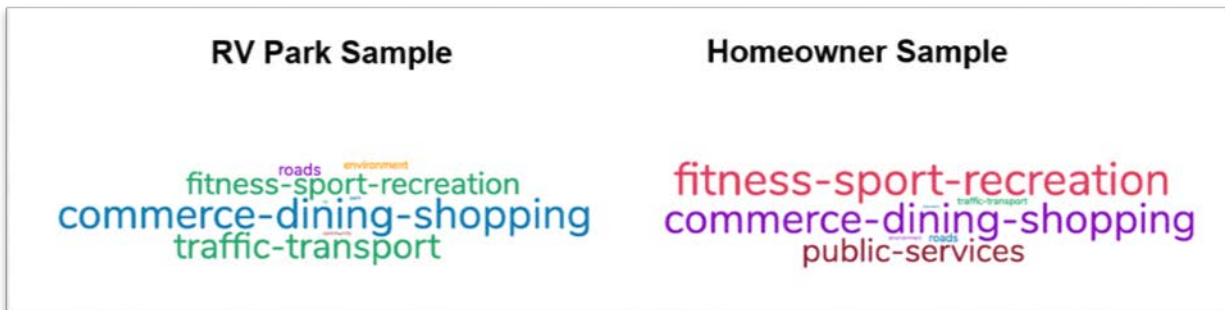
Within the responses, certain themes stand out as more recurrent. For ways a stay in Yuma could be made better, “roads” were a common general theme, particularly within the RV sample in which this type of infrastructure may be highly important for mobility. Along with road conditions and maintenance, some respondents noted that they would like to see improved trails and paths for walking and recreation. “Environment,” as shown in Figure 15, encompasses issues such as air quality, climate change concerns, and lack of trees. For factors that may hinder a return to Yuma, “age” or “health” were the top concerns, which is not surprising for the typically older demographic of Yuma winter visitors. Comments regarding recreation emerged within each of the questions’ responses. The associated response tables in Appendix C detail the specific comments that are included within each of these word domains.



**Figure 15. Ways respondents’ stays in Yuma County could be made better**



**Figure 16. Factors that might hinder a return to Yuma County as a primary vacation destination or seasonal residence**



**Figure 17. Public or private facilities that respondents would like to see developed in Yuma County**

## Comparison of Current and Past Visitor Studies

In recent years, each of Arizona's three state universities (Northern Arizona University, University of Arizona, and Arizona State University) have completed a study on Yuma tourism partly funded by the Arizona Office of Tourism and Visit Yuma (our study was additionally funded by Yuma County). These studies have focused on either the entire full-year tourism industry in the county or segments of that industry. A reason to focus on a segment is to delimit the scope of the sample in an effort to create a more reliable and valid sample of a subsegment with a larger sample size for the subsegment and more efficient sampling of tourists across the county. Together, the set of studies allows for some level of triangulation of estimates of the total tourist population and subsegments (i.e., visitors who stay in a hotel, winter visitors). For research studies, a determined list or way of intercepting tourists is necessary to enumerate a population and select or target a sample. If the sample is drawn from the population the data can be a better estimate of the population and inferential statistics can be used upon the sample to project population estimates. With tourism, it is often challenging to possess a

population or sample list. Hotels generally do not share guest contact information, attractions do not collect personal information, and many locations (i.e., downtown shopping areas, parks and natural areas) lack any counting of users and also do not collect any personal information, nor do they collect fees where a visitor count could be obtained. These challenges make studying tourists very complex. Tourism studies aim to overcome these challenges, often with a very limited budget to staff intercepts of tourists in the community and at businesses, or to fund a mail survey if addresses are obtained. Common techniques used in tourism surveys are to ask businesses and visitor centers to follow a sampling calendar and randomly distribute on-site self-administered surveys on select days, to intercept visitors at events on known days and times, or to collect email addresses and send an online survey after a visitor returns home. Mail surveys are generally used with homeowner populations in which a name and mailing address are the only contact information available.

Table 10 reviews the characteristics and select estimates of the three Yuma tourism studies. The NAU study was conducted in 2010 and occurred over a 12-month period. Businesses, parks and the visitor center distributed surveys throughout the year. This NAU study is the only full-year study of the three that attempted to estimate tourists in Yuma in general. The U of A study conducted in 2016 (over 13 months of data collection) and the ASU study in 2017-18 (over 6 months of winter/spring only) were targeted at subsamples of the tourism industry, as Visit Yuma (the official tourism office of the county) and other stakeholders were needing accurate estimates of their larger tourism services (hotels along Interstate 8, in the U of A study) and visitors (winter visitors, in the ASU study).

One additional non-university study was conducted by the newspaper Yuma Sun in 2012. This article provides some findings from this study of winter visitors:  
[https://www.yumasun.com/winter-visitors-vital-part-of-local-economy/article\\_c857f346-5e15-5c45-a7df-7ae5e3072ba2.html](https://www.yumasun.com/winter-visitors-vital-part-of-local-economy/article_c857f346-5e15-5c45-a7df-7ae5e3072ba2.html)

**Table 10. Overview of recent tourist studies for Yuma County with analyses focused on winter visitors and/or tourists**

	NAU 2010 Yuma Tourism Study	Yuma Sun Newspaper 2012 Study	U of A 2016	ASU 2017-18 Winter Visitors
Population studied	Visitors (transit, business, leisure, VFR, winter visitors)	Winter visitors	Nonlocal hotel guests in Yuma County	Winter visitors (30 days or more), Winter tourists (< 30 days)
Population estimate and source of estimate	<b>1.4 million individuals.</b> NAU received annual visitation from select public and private locations, computed hotel volume with STR data	<b>Reported in newspaper article 83,000 individuals at peak of winter/spring season</b>	<b>803,600 overnight travel parties</b> in hotels in Yuma County (April 2015-April 2016) Source Smith Travel data	<b>Homeowners</b> 9,154 households or 18,307 individuals <b>RV Lot Visitors</b> 22,000 travel parties or 43,959 individuals
Sample size (respondents)	1,316 completed surveys	455	1,062	1,463 for information center, events, homeowners and RV parks
Response rate	54%	Not assessed	Not reported	36.4% for mail survey of seasonal homeowners
Time coverage of sample	12 months (49% of surveys Dec-May) with March largest # of surveys	Cross sectional survey during winter/spring season	13 months April 2015-April 2016 (48% of surveys Dec-May)	6 months (Dec 2017-May 2018)
Sampling locations	Hampton Inn (48%), Quartermaster Depot (22%), Visitor Bureau (5%), Midnight at the Oasis event (2%), 8 other places (<6% each).	Online with newspaper subscribers and daily purchasers  In person at Welcome Back Bash, Taste of Home Cooking School, Yuma Visitor Information Center (VIC)	Hotels only. La Fuente Inn (33%), Coronado Hotel (14%), Candlewood Suites (14%), Hilton Garden Inn (13%), all others (total of 26%).	Visitor Info. Center (VIC) Three events, including Midnight at the Oasis Four RV parks (Visit Yuma members) Entire county of part-year home/mobile owners in Yuma County

	NAU 2010 Yuma Tourism Study	Yuma Sun Newspaper 2012 Study	U of A 2016	ASU 2017-18 Winter Visitors
Sample and methods	On-site survey with economic spending on-site and during trip  Distributed by “front desk” employees	Convenience sample	On-site survey with economic spending on-site and during trip  Distributed by “front desk” employees	VIC and events – on-site with select follow-up with email addresses  RV parks – on-site and online timed toward end of stay with economic spending Home/mobile – mail timed toward end of stay with economic spending  Distribution of VIC surveys was by VIC staff, event surveys ASU, RV parks was park staff, Home/mobile ASU mailed to random sample
Estimate of extended stays in second homes or RVs; av. length of stay	9.9% from purpose of visit (75 respondents staying 1-6 months in Yuma which is 6.2% of sample who indicated length of stay)  61 nights for extended stay (purpose) 59 nights second homes 35 nights RV parks/campgrounds	5 months (39%) 6 months (30%) 1-4 months (26%)  Most popular: Arrival month (October) Departure month (April)	0 (no category in purpose of stay). During Jan-March 21.3% of hotel guests were visiting friends and relatives.  Only 1% of Jan-March hotel guests stayed overnight 31+ nights.	100% of sample stayed 30 nights or longer during Nov to May 2017-18 period.  Homeowners: 148 nights sited home; RV/Mobile 133 nights  RV Park: 114 nights
Day vs. Overnight visitors	5.5% day 86.1% overnight 8.4% not provided	0% day 100% overnight	0% day 100% overnight	0% day 100% overnight
Travel Party Size	2.6 people (including children), but on economic impact used 2.2 for overnight visitors	Not reported	2.5 people (including children), but used median of 2.0 in economic	2 persons median and mode for homeowners and RV parks

	NAU 2010 Yuma Tourism Study	Yuma Sun Newspaper 2012 Study	U of A 2016	ASU 2017-18 Winter Visitors
International visitors	Included. 9% international with Canadians (70% of int'l); UK (12%)	Included: Alberta (17%)	Included. 18% international; with Canadians (66%), Europe (20%), Mexico (10%), other (4%).	Included only for VIC, events, RV parks, not home/mobile owners.
Spending profile for Extended/Winter visitors	\$139million in direct spending \$227million in total spending, incl. indirect and induced. 1,818 direct jobs (2,688 total jobs)	\$657million reported in newspaper article; 6,660 jobs; earning \$15.6m and \$40.5m taxes (all visitors less than 30 days- Dean Runyon is source)	\$144million in direct spending \$200million in total spending 2,500 total jobs	\$179million in direct spending by seasonal homeowners and RV park winter visitors \$452million in total spending, incl. indirect and induced. \$40.7million in state/local taxes \$35.0million in federal taxes 4,733 total jobs

## Population Estimation

### *Summary and Economic Implications*

Findings from all four visitor surveys plus monthly visitor counts from the Yuma Visitor Information Center provided to the Arizona Office of Tourism were used to estimate Yuma County's 2017-2018 winter visitor population. Results of these estimates were checked against secondary data, including previous research reports, information from a Yuma County RV park manager, and population lists from the Yuma County tax assessor. The estimates were found to be within a realistic range. Full detailing of the multi-step population estimation methods can be found in Appendix A.

Economic spending data were collected from the long-version survey distributed to the homeowner and RV/mobile home park populations. Table 11 shows a summary of population estimated from the winter visitor studies, alongside a calculated estimate of total spending per segment. A total of 71 thousand individual winter visitors who stayed 30 days or longer in Yuma County during the 2017-18 season were estimate and their direct spending for those who own a home or lot or rent a lot in a RV Park is estimated at \$179 million of direct spending.

**Table 11. Summary of estimated Yuma winter visitor (30+ days) population and spending by accommodation category**

	Owned house, town-home, condo, cabin	Owned RV/mobile home in park	Rented RV/mobile home in park	Camping (all - RV and other)	Rented apt., home, etc.	Private residence of a friend or relative	Hotel/motel	Total Yuma winter visitors
Est. % of pop.	13%	12%	54%	8%	4%	6%	3%	100%
Winter visitor pop.	9,553	8,754	38,664	5,295	2,942	4,118	1,765	71,091 individuals
Est. total direct spending	\$40.3 million		\$138.7 million		n/e	n/e	n/e	\$179.0 million

n/e = not estimated



## Economic Impact of Seasonal Homeowner Population and RV Park Population

### *Definitions for terms used in economic impact analysis:*

- **Output:** the total value of production.
- **Employment:** annual average jobs. This includes self-employed and wage and salary employees, and all full-time, part-time and seasonal jobs, based on a count of full-time/part-time average over twelve months.
- **Value Added:** the combination of labor income, other property type income, and indirect business taxes. Other property type income includes corporate profits, interest income and rental payments. Value added accounts for all non-commodity payments associated to an industry's production.
- **Labor Income:** composed of two components. These are employee compensation and proprietor income. Employee compensation is total income to the labor factor of production. From the point of view of a business, employee compensation is the total cost of labor including wages and salaries, other labor related income like health and retirement benefits, and both employee and employer contributions to social insurance. Proprietor income is the total income to a sole proprietor or self-employed 'employee.'
- **Indirect Business Taxes:** taxes collected by businesses on behalf of the government. These include sales tax, excise tax, property tax, fees, fines, and licenses.
- **Tax Impacts:** federal and state/local taxes. The IMPLAN software does not separate state taxes from county taxes in the study region but if the impact region is local, then state/local tax implies local tax contributions and jobs.

Total economic impact of select winter visitor segments (seasonal homeowners and RV parks) for the 2017-18 is \$179.0 million in terms of direct spending (Table 12). Value added contribution (gross domestic product) is estimated to be \$260.5 million (Table 13). Total tax contributions are estimated to be \$40.7 million in state/local tax and \$35.0 million in federal tax (Table 14). IMPLAN software was used for these estimates and 2018 was the base year of data employed.

**Table 12. Total direct expenditures by 2017-18 winter visitors**

Segments	Average Per Party	Total Expenditures
Homeowner	\$4,406.11	\$40,333,579.23
RV Parks	6,305.04	138,710,965.78
<b>Total</b>	<b>\$10,711.15</b>	<b>\$179,044,545.01</b>

**Table 13. Total economic impact of 2017-18 winter visitors**

Segments	Employment	Labor Income	Value Added	Output
Homeowners	705.6	\$20,264,063.60	\$29,347,163.00	\$49,494,326.2
RV Parks	4,026.90	141,318,150.90	231,128,623.50	403,286,419.20
<b>Total</b>	<b>4,732.5</b>	<b>\$161,582,214.50</b>	<b>\$260,475,786.50</b>	<b>\$452,780,745.40</b>

**Table 14. Tax contributions of 2017-18 winter visitors**

Tax Category	Homeowners	RV Parks	Total
Total State/Local Tax	\$4,314,430.00	\$36,343,681.00	<b>\$40,658,111.00</b>
Total Federal Tax	\$4,230,382.00	\$30,743,185.00	<b>\$34,973,567.00</b>

**Seasonal Homeowner (Home/Mobile) Winter Visitors**

For the seasonal homeowner, a Yuma County 2017 tax assessor's database was provided to ASU. We randomly selected 1,000 in U.S. households to mail a paper questionnaire for their completion. Respondents reported spending across their stay (surveys were sent in May to their permanent address). Two-hundred-and-six (206) of the respondents provided accurate amounts for the categories, 10 respondents provided a total amount only (for which we allocated the spending to categories based on percent of the 206 who provided detailed spending), and 67 respondents did not complete the economic question often putting words like "I don't know," "too much," "can't remember," or simply "?." A few extreme outliers were excluded in the categories of restaurants, groceries, entertainment, and other retail spending. One homeowner indicated staying in a hotel/motel in Yuma, which is why there is a \$2.31 average party amount. RV fees were incurred by those who own a lot but are still charged maintenance or annual fees by the RV parks. It is also important to note that we did not ask homeowners to report the following expenses that they incur being a land/home owner: property taxes, utilities, landscaping, and association dues. If a respondent identified these expenses, we excluded them as not everyone provided that data. Another identifiable spending amount was for automobiles.

As shown in Table 15, the largest spending categories are groceries with \$1,576, on average per homeowner property, followed by restaurant spending of \$865 and the "other" category of retail spending of \$761 (primarily retail spending in Yuma at the mall, swap meets, and retail chains, as respondents shared when prompted to provide details in the questionnaire). The survey also asked participants for estimated numbers of meals dined out for breakfast, lunch and dinner. Home/mobile owners reported dining out on average 13 times during their winter stay for breakfast, 18 times for lunch, and 18 times for dinner (not included in table). These totals varied greatly between respondents, with some only very rarely dining outside of the home and others dining out daily.

Figure 18 provides percent of spending in each category for the entire sample. In total, based on 9,154 households visiting their owned home/lot in Yuma County in 2017-18, the direct spending of this population is \$40.3 million. This level of spending by seasonal homeowners is estimated to have created 706 jobs, \$20.2 million in labor income, \$29.3 million in value added, and a total economic impact (output) of \$49.5 million in Yuma County (Table 16). This spending creates \$4.3 million in state and local taxes and \$4.2 million in federal taxes (Table 17). Another tax implication is property taxes for seasonal homes. Yuma County Assessor's Office provided a figure of \$14.6 million in ad-valorem taxes for those who own a lot or home and are considered seasonal homeowners.

Five seasonal homeowners reported purchasing a car in Yuma County during their 2017-18 stay (see Table 18). The five households comprise 2.3% of the sample or an estimated 105 households in the population. The average price of the five cars was \$30,360 for an estimated total direct automobile spending of \$3.2 million. As shown in Table 18, the output associated with automobile purchases is valued at \$1.8 million, the federal tax contribution is \$73.2 thousand and \$266.7 thousand of state and local tax contribution.

**Table 15. Direct expenditures for 2017-18 homeowner winter visitors**

<b>Category</b>	<b>Average Per Party</b>	<b>Total Expenditures</b>
<b>Lodging</b>	\$2.31	<b>\$21,189.81</b>
<b>RV Rental</b>	87.48	<b>800,805.48</b>
<b>Restaurant</b>	865.17	<b>7,919,773.38</b>
<b>Groceries</b>	1,576.22	<b>14,428,738.22</b>
<b>Gas</b>	633.90	<b>5,802,695.17</b>
<b>Entertainment</b>	362.20	<b>3,315,612.70</b>
<b>Entrance Fees/Licenses/Donations</b>	117.73	<b>1,077,671.60</b>
<b>Other*</b>	761.10	<b>6,967,092.87</b>
<b>Total</b>	<b>\$4,406.11</b>	<b>\$40,333,579.23</b>

Sample n= 216 homeowners: Population N=9,154 households (travel parties).

\* this was treated as a misc. retail sector in the economic model.

Spending by Seasonal Homeowners (percent by category)

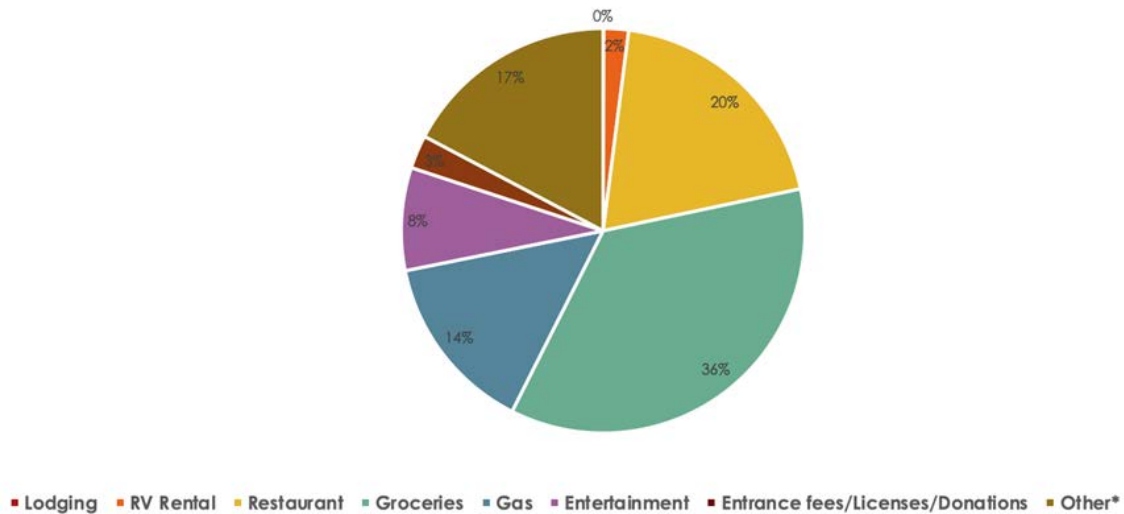


Figure 18. Spending by seasonal home/mobile owner (percent of category)

Table 16. Total economic impact of 2017-18 home/mobile owner winter visitors

	Employment	Labor Income	Value Added	Output
Direct	586.0	\$15,731,243.70	\$21,287,717.40	\$34,167,282.30
Indirect	44.4	1,679,437.20	2,833,487.70	5,698,622.50
Induced	75.2	2,853,382.80	5,225,957.90	9,628,421.50
<b>TOTAL</b>	<b>705.6</b>	<b>\$20,264,063.70</b>	<b>\$29,347,163.00</b>	<b>\$49,494,326.30</b>

Table 17. Tax contributions of 2017-18 home/mobile owner winter visitors

Tax Category	Employee Compensation	Proprietor Income	Tax on Production	Households	Corporations	Total
Total State/Local Tax	0	0	\$3,907,607.00	373,387.00	33,436.00	<b>\$4,314,430.00</b>
Total Federal Tax	\$1,950,065.00	92,421.00	381,243.00	1,490,159.00	316,494.00	<b>\$4,230,382.00</b>

**Table 18. Total economic impact of 2017-18 home/mobile owner winter visitors purchasing vehicles in Yuma County**

	<b>Employment</b>	<b>Labor Income</b>	<b>Value Added</b>	<b>Output</b>
Direct	9.5	\$551,517.4	\$910,571.4	\$1,185,462.8
Indirect	1.0	41,242.7	65,724.6	132,931.6
Induced	3.8	145,705.8	266,646.1	491,431.7
<b>TOTAL</b>	<b>14.4</b>	<b>\$738,465.9</b>	<b>1,242,942.1</b>	<b>\$1,809,826.1</b>

### **RV Park Winter Visitors**

For the RV Park user, ASU used the list of RV Parks provided in the Visit Yuma Visitor Guide. These parks attract more transient users, with most lots leased rather than owned. Four of 44 parks were willing to distribute surveys to all or select guests (i.e., program participants). Respondents reported spending across their stay (surveys were provided to three parks mid-season [January] and one park distributed surveys by email around the guest's departure date). Two hundred and six (206) of the respondents provided accurate amounts for the categories, 12 respondents provided a total amount only (we allocated the spending to categories based on percent of the 206 who provided detailed spending), and 56 respondents did not complete the economic question. A few extreme outliers were excluded in the categories of restaurants and other retail spending.

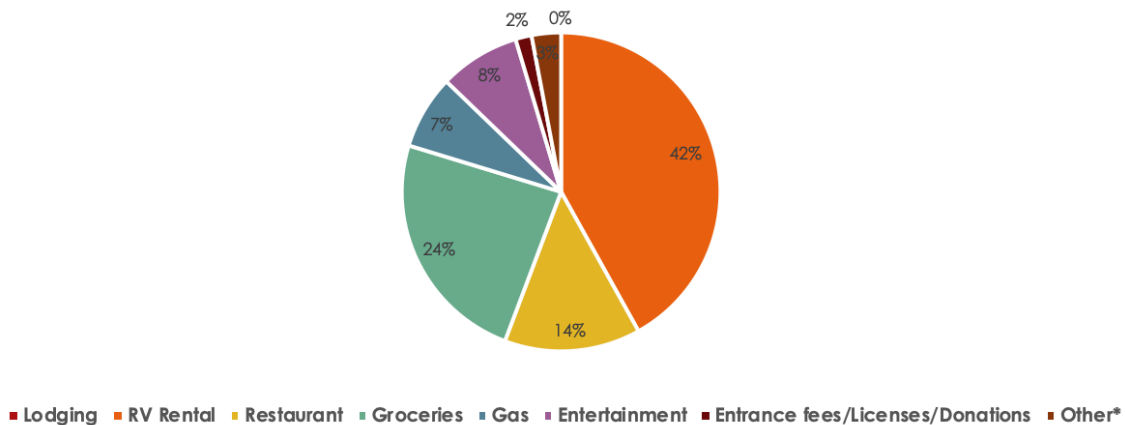
As shown in Table 19, the largest spending categories is RV rental costs with \$2,643 per travel party. This is followed by groceries with \$1,511, on average per RV Park travel party, and restaurant spending of \$871. Regarding the number of meals RV park respondents dined out in Yuma, averages were very similar to the home/mobile owner sample: 12 times for breakfast, 17 for lunch, and 19 for dinner (not shown in table). The other category of \$188 is primarily retail spending in Yuma at the mall, swap meets, and retail chains (as shared in the "describe" line where respondents provided detail). Figure 19 provides percent of spending in each category for the entire sample. In total, based on 22,000 RV travel parties in Yuma County in 2017-18, the direct spending of this population is \$138.7 million. This level of spending by seasonal homeowners created 4,027 jobs, \$141.3 million in labor income, \$231.1 million in value added, and total economic impact (output) of \$403.3 million in Yuma County (Table 20). This spending creates \$36.3 million in state and local taxes; and \$30.7 million in federal taxes (Table 21).

**Table 19. Direct expenditures for 2017-18 RV park winter visitors**

Category	Average Per Party	Total Expenditures
Lodging	\$0.0	\$0.00
RV Rental	2,643.23	58,151,146.79
Restaurant	871.19	19,166,163.85
Groceries	1,511.06	33,243,211.01
Gas	472.34	10,391,467.89
Entertainment	515.89	11,349,678.90
Entrance fees/Licenses/Donations	103.42	2,275,183.49
Other*	187.91	4,134,113.85
<b>Total</b>	<b>\$6,305.04</b>	<b>\$138,710,965.78</b>

Sample n= 218 RV park travel parties: Population N=22,000 travel parties.

\* this was treated as a misc. retail sector in the economic model.



**Figure 19. Spending by RV park user (percent of category)**

**Table 20. Total economic impact of 2017-18 RV park winter visitors**

	Employment	Labor Income	Value Added	Output
Direct	2,912.60	\$98,705,564.50	\$155,585,933.50	\$259,673,303.90
Indirect	379.20	14,725,465.10	24,428,288.40	49,467,678.60
Induced	735.10	27,887,121.30	51,114,401.60	94,145,436.70
<b>TOTAL</b>	<b>4,026.90</b>	<b>\$141,318,150.90</b>	<b>\$231,128,623.50</b>	<b>\$403,286,419.20</b>

**Table 21. Tax contributions of 2017-18 RV park winter visitors**

<b>Tax Category</b>	<b>Employee Compensation</b>	<b>Proprietor Income</b>	<b>Tax on Production</b>	<b>Households</b>	<b>Corporations</b>	<b>Total</b>
Total State/ Local Tax	0	0	\$33,350,296.00	2,622,313.00	371,072.00	<b>\$36,343,681.00</b>
Total Federal Tax	\$12,450,783.00	1,763,020.00	3,253,801.00	9,763,141.00	3,512,440.00	<b>\$30,743,185.00</b>

## **Discussion of Findings**

The aim of this study was to estimate the number of winter visitors in Yuma County for a winter/spring season. The 2017-18 season was used for the estimate. In total, 71,000 individuals or about 35,500 travel parties were estimated as winter visitors (those who stay at least 30 days in Yuma County), using several sources of primary and secondary data. The estimate of approximately 62,266 individuals or 31,130 travel parties for those who stay at RV parks or at their own owned home, mobile, or lots is the most accurate. Those others who stayed with friends, rented apartments or in hotels or motels are likely to be underestimated as we did not directly study these visitors. The direct economic impact of winter visitors at RV parks or in their own owned home is \$179 million. Using IMPLAN, a total output value of direct, indirect and induced spending in Yuma County is estimated at \$453 million for a six-month time period (December to May) by winter visitors. It is important to note that this economic impact is in addition to other economic estimates of visitors to Yuma County who stay shorter time periods, particularly those who stay in hotels, motels, or with friends and relatives.

The findings also show that these winter visitors find much to do in the community. Outdoor recreation, shopping, visiting the casinos, crafts, going out to eat, attendings events, using medical and dental services in the region, and travelling to Mexico were all popular activities. RV park seasonal residents and homeowners were asked about possible improvements, which produced a variety of suggestions pertaining to infrastructure and services.

Winter visitors tend to be retired and this was true with those we studied. The RV park visitors are slightly younger and more active than those who stay in their own homes. A key to the successful future of Yuma as a snowbird destination will be to closely monitor trends in retirees and consider the amenities (e.g., bike trails, healthy food, leisure activities) that appeal to a younger retiree. The RV industry, realtors, public land managers, and other destination and attraction managers can help promote a product and experience that is popular with that age group. Another relevant phenomenon of aging is the possibility of losing a spouse. There were a sizable number of individuals who travel and stay on their own within these Yuma County winter visitors. Making single people feel socially engaged and part of a winter community will

keep them active and returning. While we did not study the military population, they also play an important role in the social and economic vitality of the county, and make an appropriate segment to invite back to Yuma County when they retire. Efforts to further promote Yuma County in geographic pockets of Canada, Washington, Oregon and California would target those households that currently are Yuma County's best winter visitors!



## Appendix A. Detailed methodology for studies and population estimates

This research employed multiple surveys to reach a broad representation of Yuma winter visitors. This research follows a 2016 study of Yuma hotel visitors (Kerna, A., Duval, D., and Frisvold, G. [2016], *Yuma Visitor Survey: Characteristics and Economic Impacts of Hotel Visitors*) and a 2011 study of visitors to Yuma (Arizona Hospitality Research and Resource Center [2011], *Yuma Area Tourism Study*). The 2016 study aimed to explore the potential for growing and diversifying the Yuma visitor base. This current study broadens the scope of the 2016 study by including winter season visitors who stay in non-hotel accommodations, as well as homes owned/occupied by seasonal residents. This is an important addition, as Yuma has a very broad array of RV/mobile home and other alternative accommodation options. A previous Arizona Office of Tourism/ASU study of Mesa, AZ (Institute for Social Science Research at ASU, [2007], *Arizona Winter Visitor Pilot Study*) provided a foundation for structuring research that includes different strata of accommodation types. This 2007 and 2011 research also identified some of the key challenges and issues of studying winter visitors: there may be a lack of a valid population list (i.e., from county, community, or P.O.) from which to sample mobile homes, visiting friends and relatives (VFR), RVers and campers, and while some businesses may have lists, not all visitor types may be represented or documented (such as people visiting friends, staying at campgrounds, or camping dispersed on public lands).

### Sampling & Response Rate

To address the challenge of how to adequately sample a transient, potentially multi-home population of winter visitors who may not be found at typical tourist locations (such as hotels), this research utilized a variety of sampling strategies with the goal of obtaining a more representative sample of winter visitors. ASU tourism researchers worked with partners Visit Yuma and Yuma County Supervisor's Office to select appropriate research approaches. ASU students and local staffs were trained to implement data collection. Surveys were distributed to the following samples: 1) to attendees at three Yuma events (Table A-1); 2) to visitors at the Yuma Visitor Information Center (Table A-2); 3) to winter visitors staying at four Yuma RV parks with leasing (The Palms RV Resort [1/3 of lots owned], Blue Sky Ranch Resort, Westwind RV & Golf Resort, and Adobe Village RV Park; see Table A-4); and 4) to non-full-time resident Yuma property owners (Table A-5). Yuma residents were screened out on site from Visitor Info Center and events samples and omitted from the property (home/mobile) owners sample. For the property owner survey, over the course of a month the selected sample was mailed two copies of the survey plus a reminder postcard. The Visitor Information Center and events surveys were conducted as intercept surveys and respondents were asked if they were willing to participate in an email follow-up survey with one reminder. Data collection began in December of 2017 and continued through May of 2018. Initial findings from event surveys indicated that the sampling frame included appropriate types of events/locations for reaching the target population of winter visitors and tourists.

### **a. Events**

For the survey of event attendees, the research team intercepted attendees at three events determined by Visit Yuma as the best events to capture winter visitors. Several ASU staff and students were present at the events and intercepted in different areas. The Medjool and Lettuce events were free entrance whereas the Midnight at the Oasis required ASU to get free admission at an otherwise ticketed event. Event attendees were asked if they were Yuma residents or winter visitors, and only those who were visitors were then invited to participate in the survey research, one survey per household/travel party. Across the three events, 314 surveys were collected. Participants who listed their email addresses and met criteria as winter visitors (staying in Yuma 30 nights or more) were contacted (along with qualifying participants from the Visitor Info Center survey for about 1/3 of each sample of n=192) with a follow-up online survey that included more in-depth, economic spending questions, resulting in 57 responses. This quantity was considered too low for analysis and was excluded from further results.

**Table A-1. Event attendee survey collection**

<b>Event</b>	<b>Date</b>	<b>Number of surveys attempted</b>	<b>Number of surveys collected</b>
Medjool Date Festival	January 27, 2018	100	93
Yuma Lettuce Festival	February 24, 2018	160	132
Midnight at the Oasis	March 2 & 3, 2018	120	89
<b>Total</b>		<b>380</b>	<b>314</b>

### **b. Visitor Information Center (VIC)**

A two-page intercept survey was administered to winter visitors and shorter-term tourists at the Yuma Visitor Information Center. Signage informed patrons of the research and invited them to participate, and Visitor Center staff and volunteers helped to facilitate the collection. Initially ten randomly selected dates per each month were determined to distribute the survey but that was increased in April and May to catch up. In total, surveys were collected between December 2017 and May 2018. Participants were entered in drawings for dining gift certificates each month provided by Visit Yuma. In total, 481 surveys were collected from the Visitor Information Center.

An additional source of data that was used in research planning and in the population estimate process was the list of monthly visitor counts that the VIC regularly provides to the Arizona Office of Tourism. This visitor population (i.e. number of people who visited the VIC) is shown in Table A-3. Since some months (December, May) appeared unusually low, previous years' data was also reviewed for a comparison, as these low numbers could be due to error. This is further discussed on page 49 regarding the population estimate methods.

**Table A-2. Visitor Information Center surveys**

<b>Sampling month</b>	<b>Surveys attempted (days of surveying X number of surveys to complete each day)</b>	<b>Surveys collected</b>
December, 2017	10 X 25=250	222
January, 2018	10 X 25=250	142
February, 2018	10 X 25=250	71
March, 2018	9 X 25= 225	26
April, 2018	18 X 20= 360	8
May, 2018	13 X 20 =260	12
<b>Total</b>	<b>1,595</b>	<b>481</b>

**Table A-3. Visitor Information Center population. Source: Arizona Office of Tourism and Visit Yuma**

<b>Month of Data</b>	<b>Visitor Center</b>	<b>Local Counts</b>	<b>In-State Counts</b>	<b>Out-of-State Counts</b>	<b>Foreign Counts</b>	<b>Total</b>
17-Dec	Yuma Visitor Center	48	55	496	303	<b>902</b>
18-Jan	Yuma Visitor Center	396	435	6,192	3,340	<b>10,363</b>
18-Feb	Yuma Visitor Center	203	534	5,827	3,985	<b>10,549</b>
18-Mar	Yuma Visitor Center	60	688	4,135	2,415	<b>7,298</b>
18-Apr	Yuma Visitor Center	197	246	2,719	573	<b>3,735</b>
18-May	Yuma Visitor Center	437	287	144	10	<b>878</b>
Total for study period		1,341	2,245	19,513	10,626	33,725
Proportion of sample		4.0%	6.7%	57.9%	31.5%	100.0%

### ***c. RV and Mobile Home Parks***

RV and mobile home park seasonal residents were considered an important population to reach, as such parks are very common in Yuma County. Visit Yuma has 40 parks within its membership that are prominently featured in marketing materials (printed, online). For this survey, four parks that are members of Visit Yuma were approached and agreed to participate in the research. Resort managers and administrative staff helped to facilitate communication and distribution with park residents. Paper versions of the survey were manually distributed by park staff timed for mid-to-late winter season, and at one of the parks, an online version of the survey was distributed via email one week before checkout. The total number of leased spaces across these four resorts is 1,708 (not necessarily all occupied during the 2017-18 as no occupancy for RV parks is known or total number of leased customers for turnover and reuse of spaces during the season), and in total 305 surveys were collected.

**Table A-4. RV and Mobile Home Park survey collection**

<b>RV/Mobile Home Park</b>	<b>Number of rental spaces</b>	<b>Number of paper surveys sent</b>	<b>Number of surveys received</b>
Adobe Village (paper)	118	120	37
Westwind (paper)	1,075	600	127
Blue Sky (paper)	192	100	10
Palms RV (online)	453 with 130 owned	n/a	131
<b>Total</b>	<b>1,708</b>	<b>Goal: 500</b>	<b>305</b>

**d. Seasonal Homeowners**

To sample seasonal homeowners, a list of out-of-county permanent addresses was generated by the county tax assessor, enabling us to discern seasonal/part-time residents from year-round/full-time residents. Two lists were provided. The original list was 9,805 records and was identified as secondary residents. The second list included three segments: out of county (n=10,438); mobile rentals (n=235) and rentals (n=6863). **The original list of secondary residents was used as it was deemed to fit our target population of winter visitors better.** For our purposes, seasonal residents were thereby defined as taxpayers with a property site address in Yuma County and a permanent address in a place outside of Yuma County. Owners of vacant lots were not included in this list and the average Improved FCV was \$51,110; 9,632 had a subdivision id number (suggesting the property, house, or mobile is located in a subdivision); and 3,675 included mobile home information. From the original list of 9,805 cases, duplicate entries were removed as well as cases that indicated that the property was owned by a business, agency, or firm, rather than individual(s); however, trusts were still included as previous knowledge of Yuma indicated that many of these were linked to a single family/household. Foreign addresses were also removed due to survey mailing constraints on costs and ability to receive returned surveys using prepaid business reply envelopes. The remaining population list contained 7,622 unique cases. Of this remaining list, 1,000 cases were originally randomly selected and surveys were mailed to these addresses. The mailings were scheduled for the beginning of May, to coincide with the end of the typical winter visitor season and when the sample would be more likely to receive mail at their primary residence. As surveys were returned to sender due to bad addresses after the first two weeks, new cases were substituted (n=54). The Dillman (2000) survey process was used with each nonresponding case sent a reminder postcard and a second survey mailing. A business reply envelope was included in all survey mailings and an incentive of four \$25 gift cards provided by ASU were used to incentive returns. A total of 349 completed surveys were received, for a response rate of 35%.

**Table A-5. Seasonal homeowner survey response rates**

<b>Description</b>	<b>Number/Percentage</b>
Total surveys mailed to randomly drawn sample of seasonal homeowners	1,054
Bad addresses returned to sender (U.S.P.S.)	77 (7.3%)
Deceased (notified by call, email or returned letter)	4*
Sold property (notified by call, email or returned letter)	5*
Moved to Yuma full-time (notified by call, email or returned letter)	8*
Declined to participate in survey	3*
Net sample	957 (est. 90%)
Own property but indicated didn't visit in winter 2017-18 (q1)	22 (6%)
Seasonal homeowners who visited in 2017-18 but did not provide accurate length of stay information to verify they stayed 30 nights or more (excluded from main findings)	14
Seasonal homeowners who visited in 2017-18 and completed length of stay questions and classified as WINTER VISITOR (30+ nights)	284 (82%)
Seasonal homeowners who visited in 2017-18 and completed length of stay questions and classified as WINTER TOURISTS (<30 nights)	29 (8%)
Completed surveys of Yuma County seasonal home owners	349
Response rate	36.4%

\* These 20 cases or 2% who would no longer be considered seasonal homeowners are likely similar to bad addresses. We are estimating that 10% of the original population lists are no longer Yuma County seasonal homeowners (bad addresses 7.3% + 2% of other reasons=rounded to 10%). This percent could be higher but we have no additional information that could be obtained by reviewing more current records of homeowners or a nonresponse study of those we did not hear from. Some of these properties may have new owners and be classified as full-time, seasonal, vacant, or rental.

Effort was made to have a single set of questions across all four samples. The VIC study started first, followed by the event survey, RV park, and homeowner. Slight adjustments were made to refine questions, particularly on describing where people sleep/live during their winter visitor. Therefore, these four datasets are not merged into one dataset. This research did not include a nonresponse study, so estimates of deceased homeowners and homeowners who did not visit during 2017-18 season are likely to be underestimated. For homeowners, bad addresses were tracked and recorded. However, further information regarding what happened to the owners or the property was usually not available. The owners could be deceased, could have moved out of the mailing address (out of state), or could have sold their Yuma property. Even though the county's records reflected that the home was owned by a person, over time newer real estate transactions may have occurred. Foreclosures were a problem during 2008-2012 where owners were not present or avoided mail, and banks became owners of properties. We removed properties from our sample that indicated a bank as we assume that a winter visitor is not likely to be accounted for at such properties. For homeowners, short-term rentals were not specifically identified. Based on the second list of properties provided by the counties' tax assessment office there is some knowledge of rental properties (i.e., renter occupied). The emergence of short-term rentals for full-time and seasonal homeowners is something that

counties and communities face challenges with tracking. This study was unable to shed light on short-term rentals.

## Population Estimate Methodology

### Overview

Yuma Visitor Information Center (VIC) monthly counts (Table A-3) were used to estimate winter visitor population segments (i.e., those staying between November 2017 and May 2018, for 30 or more days). This approach was chosen based on the availability of information and the assumption that visitors who visit the VIC are likely to check it out once to see what's inside and collect information, but most will not visit more than once per season. The visitor center also attracts a wide variety of visitor types that allows a population estimate to be more inclusive of visitor types. Yuma VIC staff use a logbook and door count system for tracking visitors. The log is tallied and segmented into local, in-state, out-of-state, and international visitor categories. The 2017-2018 VIC counts, provided by Visit Yuma and verified by the Arizona Office of Tourism, were compared to previous year counts to determine whether overall trends and fluctuations were typical. Two months (December and May) were abnormally low, so the previous year's counts which better matched our observed visitation frequencies were substituted. Local visitors (approximately 5% of total count) were removed from the monthly count totals. To determine proportion of winter visitors per the counted population of VIC visitors, our calculated percentage of visitors qualifying as "winter visitors" (47%) from our VIC surveys was applied to the out-of-town visitor counts. Using survey responses from the non-VIC surveys, we were able to calculate the proportion of samples that did *not* visit the VIC to estimate the population of Yuma visitors for each accommodation segment. Based on these visitation proportions (Table A-6), we used a 21% rate for homeowners, a 25% rate for RV and mobile home park users, and a mean proportion of 31% for the remaining segments (camping, hotel/motel, private residence, and rented apartment/home). We then applied these relative proportions to the accommodation type proportions from the VIC visitor sample (with supplemental data from the events sample) to reach a final adjusted proportion per segment (Table A-7).

**Table A-6. Percentage of winter visitor survey respondents who visited VIC during 2017-2018 stay**

Survey sample	% of respondents (n)
Visitor Information Center visitors (VIC)	100% (n = 481)
Event attendees	47% (n = 119)
Homeowners (seasonal only)	21% (n = 57)
RV and mobile home park (mostly leased)	25% (n = 66)
Mean % (not including VIC sample)	31%

**Table A-7. Accommodation segmentation by proportion of total winter visitors (based on VIC and event attendee survey data)**

	VIC sample**	Event Attendee sample	Adjusted %†
Hotel/motel	3%	1%	<b>3%</b>
Private residence of a friend	7%	7%	<b>6%</b>
Rented apartment, home, townhouse or condo	5%	3%	<b>4%</b>
Owned house, townhome, condo or cabin	12%	17%	<b>13%</b>
RV/MH (all – owned and rented)	69%	60%	<b>66%</b>
- <i>Rented space at RV/MH park</i>	<i>56%*</i>	<i>49%</i>	<i><b>54%</b></i>
- <i>Owned lot at RV/MH park</i>	<i>13%*</i>	<i>11%</i>	<i><b>12%</b></i>
Camping (all)	10%	14%	<b>8%</b>
- <i>At campground (RV and other)</i>	<i>9%*</i>	<i>12%</i>	<i><b>7%</b></i>
- <i>Other camping (not at campground; RV and other)</i>	<i>1%*</i>	<i>2%</i>	<i><b>1%</b></i>
- <i>Est. total RV camping**</i>	<i>9%**</i>	<i>12%**</i>	<i><b>7%</b></i>
<i>Total RV, mobile homes &amp; camping combined</i>	<i>79%</i>	<i>74%</i>	<i><b>74%</b></i>
<b>Total</b>	<b>106%</b>	<b>102%</b>	<b>100%</b>

*Notes:* Italicized subcategories are for reference but do not contribute individually to the listed totals.

\* Single asterisk denotes our imputations based on proportions from Event Attendee survey data, as the VIC survey questions were not as specific.

\*\* Double asterisks denotes calculation based on assumption of proportion of RV users using KOA (2018) findings, as elaborated below in the RV and Mobile Homes Users section.

† These percentages are weighted to reflect respective proportions of visitors who visited the VIC, as reflected in Table A-6. About 6% of VIC survey respondents (n = 11) reported staying in more than 1 type of accommodation during their stay in Yuma. To adjust for population overestimation, the proportion of visitors who stayed in each accommodation category was multiplied by .94 to better approximate actual counts of visitors (so that the sum of all accommodation categories would equal 100% of visitor share and not more). Percentages were rounded to nearest whole number; as a result some rounding error may be present.

These relative proportions enabled us to calculate the estimated total population of Yuma winter visitors across each month and for the 2017-2018 winter season, December through May (Table A-8). These calculations estimate the total number of winter visitors (visitors who stay 30+ days between December and May) to be around 71,091 people.

**Table A-8. Population estimates of Yuma winter visitors (30+ days; all accommodation types, by number of individuals), shown by month, year, and winter season only**

	<b>Owned house, townhome, condo, or cabin† (Est. 13% of pop.)</b>	<b>Owned RV/mobile home in park (12%)</b>	<b>Rented RV/mobile home in park (54%)</b>	<b>Camping (all - RV and other) (8%)</b>	<b>Rented apt., home, etc. (4%)</b>	<b>Private residence of a friend or relative (6%)</b>	<b>Hotel/motel (3%)</b>	<b>Total Yuma visitors (30+ days) (100%)</b>
Dec '16**	1,335	1,223	5,403	740	411	576	247	9,935
Jan '18	2,454	2,249	9,931	1,360	756	1,058	453	1,8260
Feb '18	2,547	2,334	10,309	1,412	784	1,098	471	18,955
Mar '18	1,782	1,633	7,212	988	549	768	329	13,260
Apr '18	871	798	3,525	483	268	375	161	6,482
May '17**	564	517	2,284	313	174	243	104	4,199
Jun '18	293	269	1,188	163	90	127	54	2,184
Jul '18	305	280	1,236	169	94	132	56	2,272
Aug '18	275	252	1,112	152	85	118	51	2,045
Sep '18	386	354	1,563	214	119	167	71	2,875
Oct '18	388	355	1,569	215	119	167	72	2,885
Nov '18	985	903	3,987	546	303	425	182	7,330
<b>Annual visitors total</b>	<b>12,186</b>	<b>11,167</b>	<b>49,319</b>	<b>6,754</b>	<b>3,752</b>	<b>5,253</b>	<b>2,251</b>	<b>90,682</b>
<b>Winter visitors total (Dec – May)</b>	<b>9,553</b>	<b>8,754</b>	<b>38,664</b>	<b>5,295</b>	<b>2,942</b>	<b>4,118</b>	<b>1,765</b>	<b>71,091</b>

\*\* We collected data between December 2017 and May 2018. In this table, December and May are calculated with previous years' counts, as they appeared more accurate.

† Based on how survey questions were asked regarding accommodation type, winter visitors who own homes in Yuma would be spread across these two categories ("Owned house..." and "RV/Mobile home park") based on the style and setting of their owned property. The adjusted total population of homeownership visitors to Yuma across "Owned house..." and "RV/Mobile home park" segments is estimated to be approximately 20,000 (see discussion pp. 54-55).



## ***RV and Mobile Home Users***

As RV and mobile home users are the dominant lodging segment of Yuma winter visitors, Table A-9 provides a categorized overview of these associated subcategories. The event attendee surveys included more detailed accommodation segments, so the respective proportions from the event surveys were used to impute the more specific segmentations (RV and mobile home park divided into rented v. owned; camping divided into camping at campground v. camping not at a campground; see Table A-9, applying proportions from Table A-7). While campgrounds are not common in Yuma, many respondents self-identified as campers, so it was considered important to determine a likely proportion of these campers who were using RVs, likely in RV resort/park settings. Findings from the KOA 2018 North American Camping Report<sup>2</sup> estimate that within campers who camp 30 nights or more the proportion of RV users to tent campers to cabin users is 6 to 1 to 1. Based on the assumption that tent camping and cabin camping is less common in Yuma than elsewhere in the nation (reflecting the regional availability of facilities and environmental factors), we adopted a 6 to 1 ratio for our calculations, representing RV users versus other camping (such as tent or cabin). However, in our calculations, the estimated proportion of non-RV campers was small enough to be insignificant when rounding to whole percentiles across segments, and thus was removed as a subcategory.

In sum, upon considering different styles of RV and mobile home use, it is estimated that 53,984 winter visitors in Yuma use some type of RV or mobile home type accommodations that they own, lease, or use on developed or undeveloped land.

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<sup>2</sup> KOA (2018). 2018 North American camping report. Retrieved from <http://koa.uberflip.com/j/960378-2018-koa-north-american-camping-report/19?m4>

**Table A-9. RV and mobile home population estimates of Yuma visitors who stayed 30 or more days**

<b>Month (see Table 13 footnotes)</b>	<b>RV or MH in park, owned or rented</b>	<b>RV or MH in park owned only</b>	<b>RV or MH in park rented only</b>	<b>RV using camp- ground</b>	<b>RV camping elsewhere</b>	<b>Total RV/MH visitors staying 30+ days</b>
Est. % of total pop.	66%	12%	54%	7%*	1%*	74%
Dec	6,627	1,223	5,403	658	82	7,367
Jan	12,180	2,249	9,931	1209	151	13,540
Feb	12,643	2,334	10,309	1255	157	14,055
Mar	8,845	1,633	7,212	878	110	9,832
Apr	4,323	798	3,525	429	54	4,806
May	2,801	517	2,284	278	35	3,114
Jun	1,457	269	1,188	145	18	1,619
Jul	1,515	280	1,236	150	19	1,684
Aug	1,364	252	1,112	135	17	1,516
Sep	1,917	354	1,563	190	24	2,131
Oct	1,925	355	1,569	191	24	2,140
Nov	4,889	903	3,987	485	61	5,435
<b>Annual visitors total</b>	<b>60,485</b>	<b>11,167</b>	<b>49,319</b>	<b>6,004</b>	<b>750</b>	<b>67,239</b>
<b>Winter visitors total (Dec – May only)</b>	<b>47,418</b>	<b>8,754</b>	<b>38,664</b>	<b>4,707</b>	<b>588</b>	<b>52,713</b>

*Notes:* Due rounding error in the percentages, the aggregated number of RV and mobile home users shown here may not exactly reflect the totals shown in Table A-8.

\*While campsites are not common in Yuma, this table (also reflecting the Campground column in Table A-7) is based upon how survey respondents self-reported their accommodation type.

To determine whether these RV estimates were reasonable, RV/campground occupancy rates that are typical of Yuma's latitudinal range, estimated to be 90-130 site nights per site per year<sup>3</sup> were used to calculate an expected population based on the number of RV and mobile home lots counted within Visit Yuma's membership (n = 15,486) and data on arrival and

<sup>3</sup> VDM Consulting Group (2010). Analysis of the campground and RV park industry. Retrieved from <http://www.vdmconsultinggroup.com/Websites/vdmconsultinggroup/Images/ExpandedStateReportWI.pdf>.

departure dates from our RV and mobile home visitor survey sample. Our population estimates derived from the VIC counts roughly corresponded with the higher end of the expected site nights range based on latitude when we modelled this data using occupancy rates around 80% for the peak months of January through March (which we based upon anecdotal evidence from RV park managers). Within our model, 130 average site nights per site per year would translate to a peak season occupancy rate of approximately 82%, resulting in an estimated 35,194 visitors during the December through May period. Our population estimate of winter visitor RV and mobile home park renters combined with those people camping using an RV is 44,500. It is not surprising that our Yuma VIC count-based estimate would be higher, considering that the site night calculation (from VDM, 2010) is based on national site night averages. In Yuma, most RV parks/resorts are aimed at longer-term visitors, whereas the nationwide figures likely include a high proportion of seasonal parks catering to shorter-term visitor stays, with high fluctuations in occupancy over weekends and lower midweek occupancy.

As a second check of whether the RV and mobile home park population segment estimate was reasonable, we referred to data provided from one Yuma County RV park, The Palms RV Resort. This park's management reported that during the winter 2017-2018 season they had 718 lot (i.e. group) stays for their 453 available lots. This means that they had approximately 1.6 group stays per lot per season. The Palms also reported that most of their guests travel in parties of two people (i.e. two people per lot, on average), which is consistent with our survey data. If we apply this 1.6 stays per season rate to the total number of RV/mobile home lots in parks within Yuma county ( $n = 15,486$ ), this suggests an estimated total of 24,545 group lot stays, or about 50,000 individuals staying in Yuma RV and mobile home park lots during the winter 2017-2018 season. This number is very similar to our estimated number of winter visitors staying in an RV or mobile home ( $n = 52,713$ ).

### ***Seasonal Home/Mobile Owners***

To estimate of the total number of winter visitors who use their own owned properties in Yuma, the "owned house, townhome, condo, or cabin" category is combined with the "owned RV/mobile home category (referring to Table A-8). Together, these are approximately 23% of the Yuma winter visitor population, with an estimated population of 18,307 people (see Table A-8, first two columns' visitor totals combined). As a second calculation of the homeowner winter visitor population, an estimate of homeowner winter visitors was calculated from the homeowner-specific survey. From our mailing of 1,000 surveys, 54 (5.4%) were returned due to bad addresses. Our initial population list of nonresident Yuma County homeowner households included 9,805 cases, which reduces to 9,276 estimated valid addresses upon deducting the estimated proportion of bad addresses. The survey responses indicated that 90.5% of homeowner respondents visited during the winter 2017-2018 season for at least 30 days, which reduces our estimated seasonal homeowner population to 8,395 households. Multiplied by 2.5 (estimated average travel party size), we can estimate that 20,987 individuals who are seasonal homeowners (or dependents) visit Yuma for 30 or more days each winter.

This number is 2,680 higher than our VIC count estimated population ( $n = 18,307$ ), as shown in Table A-8. There are several likely reasons why these numbers appear somewhat different. First, as noted in the Table A-8 footnotes, the number of winter visitors who own properties in Yuma are included in both the “owned house...” accommodation category as well as the RV/mobile home park category. In our homeowner-specific survey, homeowner winter visitor respondents who stayed in either an owned mobile home (16% of total sample), owned RV in a park (3%), or owned RV parked outside of a park (24%) were collectively 43% of the homeowner sample. The RV and mobile home using segment is substantial within the homeowner population. The specificity of our population estimates is somewhat limited by how respondents self-reported their accommodation types, particularly for RV or mobile home users who live outside of park settings. Second, the multiplier used to account for the proportion of visitors who typically don’t visit the VIC (calculated from Table A-6) ranged considerably between survey samples. The margin of error associated with this calculation could account for our lower VIC-based estimate, as there could be a correlation between the people who are likely to fill out a visitor survey and the people most likely to visit a visitor center. There is likely also some error in the precise accuracy of the VIC door count statistics (from which estimates were derived). Lastly, the estimated population from the homeowner sample data may be slightly inflated due to some degree of nonresponse bias (i.e. those who did not visit or who own the property as an investment may be less likely to fill out and return the winter visitor survey). In conclusion, based on these two homeowner population estimates and the aforementioned assumptions and limitations, we suggest that a realistic estimate of the homeownership winter visitor population is likely around 20,000 individuals per winter season.

### ***Population Estimate Discussion and Conclusion***

These population calculations reveal the importance of including clear and detailed accommodation segmentation categories in questionnaires. There is evidently some overlap in what some respondents would consider an RV park, RV resort, and camping. Many winter visitor RV users do not stay at RV parks, further complicating descriptions as well as estimation. The VIC door counts provide a very helpful base statistic for estimating numbers of visitors, but these numbers are not foolproof. Having additional data to check these numbers against is critical, as some months may be underreported, and visitor accommodation segmentation data and information on length of stay is otherwise limited. Having an estimate of the proportion of 2017-2018 visitors who visited the VIC was essential for being able to use VIC visitor counts to impute population estimates.

The focus of this research was winter visitors specifically, so future research would be beneficial for understanding the characteristics of Yuma visitors outside of the winter season. Since our data collection period was December through May, our visitor population estimates based on the VIC counts for the non-winter months (shown non-highlighted in Tables A-8 and A-9) can only be roughly estimated. We have limited data to understand how long visitors typically stay during the summer-to-fall period and what behaviors and characteristics commonly describe these visitors. Tables 13 and 14 show the estimated proportion of visitors who stayed 30 or more days across all months based on a mean proportion of visitors who fit

this description from our survey data. Since we did not collect data to inform an adjusted proportion for June through November, these non-winter months' estimates of visitors who stayed 30 or more days could benefit from further investigation.

## Appendix B. Data on Yuma 2017-18 Visitor Study.

These data are for those visitors (**tourists**) who stayed less than 30 nights in Yuma County in the Winter 2017-18 season. They provide another view of Yuma visitors.

**Table B-1. Tourist Profile – Demographics** (n/a means not asked in the survey instrument)

	Visitor Info Center	Events	RV Parks	Home/Mobile Owners
<b>n or number of respondents in subsample to sample</b>	224/481	56/314	26/305	29/349
<b>Travel party size (mean)</b>	2.9	4.9	2.6	2.2
<b>Gender (male/female %)</b>	34/66	55/45	65/35	45/55
<b>Age – mean</b>	63 years old	65 years old	65 years old	64 years old
35 years old or less	6%	2%	0%	0%
36-50 years old	6	4	0	3
51-65 years old	33	50	63	55
66-80 years old	51	44	37	38
81+ years old	4	0	0	4
<b>Retired (% partially or fully)</b>	80%	78%	70%	53%
<b>Employment in Yuma</b> (multiple response allowed)	n/a			
No		98%	62	80%
Yes – part time or full-time in Yuma		0	0	10
Yes – work remotely		0	7	13
Yes - other		2%	4	13
<b>Ethnicity</b>	n/a			
White			77%	90%
African American			0	0
Hispanic			0	10

	Visitor Info Center	Events	RV Parks	Home/Mobile Owners
Asian			0	0
Native American			0	0
Other/or didn't provide			22	0
<b>Education</b>				
High school degree or less	n/a	n/a	6%	11%
Some college			32	35
Technical training			16	10
Associate degree			16	7
Bachelor's degree			16	10
Master's degree			0	14
Professional degree			11	13
<b>Primary residence</b>				
Other place in Arizona	8%	6%	6%	17%
Western state (excluding AZ)	32	51	56	73
Other states	25	16	6	10
Canada	33	27	32	0
Other countries	2	0	0	0

**Table B-2. Tourist Profile – Visitation History and Current Trip** (n/a means not asked in the survey instrument)

	Visitor Info Center	Events	RV Parks	Home/Mobile Owners
<b>n or number of respondents in subsample to sample</b>	224/481	56/314	26/305	29/349
<b>Years visiting Yuma County (lifetime)</b>				
First year	61%	30%	42%	0%
2-5 years	21	34	42%	13
6-10 years	8	7	16	23
11-15 years	3	7	0	17
16-20 years	2	14	0	17
21+ years	3	7	0	30
Not sure	2	0	0	0
<b>Current trip type</b>				
Day only	9%	0%	0%	0%
Overnight	91	100	100	100
<b>Overnight trip (in nights)</b> * Longer stays are in winter visitor results	7.3 mean; range 1-30*	9.0 mean; range 1-30*	8.7 mean; range 1-21*	9.2 mean; range 1-29*
<b>Month of visit</b>	<b>Sampling date</b>		<b>Arrival dates</b>	
November 2017	n/a	n/a	Sept-Nov 17.5%	Nov 7%
December 2017	40%	29% Date Fest.	9	26
January 2018	23	34% Lettuce	27	14
February 2018	20	37% Midnight	14	7
March 2018	9	n/a	18	14
April 2018	4	n/a	14	14
May 2018	4	n/a	0	18
<b>Yuma main destination for trip</b>	47%	61%	41%	100%
<b>Left Yuma during visit</b>	n/a	n/a	35%	17%



	Visitor Info Center	Events	RV Parks	Home/Mobile Owners
<b>Visitor group</b>				
Friends only	13%	22%	13%	10%
Family only	65	48	87	57
Family and friends	5	11	0	13
Organized group tour	1	0	0	0
Business associates	<1	0	0	0
Traveled alone	16	19	0	20
<b>Size of group</b>				
Women	1.4 mean; range 0-22, total 330	2.4 mean; range 0-40, total 133	1.2 mean; range 0-6, total: 31	1.2 mean; range 0-4, total 37
Male	1.3 mean; range 0-20, total 310	2.3 mean; range 0-40, total 130	1.2 mean: range 0-7, total 32	1.0 mean; range 0-4, total 31
Children	0.1 mean, range 0-2 kids, total 10	0.2 mean, range 0-6, total 9	0 of 26 parties had kids	0.1 mean; 1 of 29 parties had kids, total 3
<b>Total</b>	2.8 persons, total 650	4.8 persons, total 272	2.4 persons, total 63	2.2 persons, total 71

**Table B-3. Tourist Decision Making for Trip to Yuma** (n/a means not asked in the survey instrument)

<b>Most important factor that first made a visitor consider Yuma County</b>	<b>Visitor Info Center</b>	<b>Events</b>	<b>RV Parks</b>	<b>Home/Mobile Owners</b>
<b>n or number of respondents in subsample to sample</b>	224/481	56/314	26/305	29/349
Word of mouth	25%	35%	8%	3%
Friends/Family members who are staying in Yuma	21	29	32	72
Passing through on a road trip	16	2	12	0
Previous trip to the area	10	2	8	0
Visit Yuma website (CVB)	3	2	4	0
Available accommodations, incl. RV/Mobile space	2	0	8	0
Visit Yuma visitors guide	2	0	0	0
Advertisement	2	4	0	0
Travel or RV show	2	0	0	3
Cost of a winter stay in Yuma/affordability	1	6	0	0
Weather	2	13	12	4
Website or travel literature from AZ Office of Tourism	1	2	0	0
A newspaper or magazine article	1	0	0	0
Where we usually visit was impacted by natural disasters (2017 – CA fires, Hurricane in TX and FL)	n/a	0	0	0
TV or radio program	<1	0	0	0
Other	12% Dental	5% Car show Dental	16% Mexico Dental	18% Business trip Employment opportunity Friend selling house Own rental houses Navy duty
<b>Total</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>

**Table B-4. Tourist Experience** (n/a means not asked in the survey instrument)

	Visitor Info Center	Events	RV Parks	Home/Mobile Owners
<b>number of respondents in subsample to sample</b>	224/481	56/314	26/305	29/349
<b>Leisure activities during visit (multiple responses allowed)</b>				
Visiting Yuma Visitor Center	100%	25%	22%	11%
Sightseeing or touring	81	59	60	22
Visiting a national, state or regional park	70	34	44	22
Visiting museums, art galleries, or historic site	69	45	44	7
Walking/Hiking/Biking	63	43	44	30
Shopping	59	68	52	70
Visiting a casino	28	34	17	30
Engaging in photography, painting or jewelry making	15	9	0	7
Attending a live performance	10	32	9	11
Golfing	8	20	13	26
Attending a boat, air or car show	6	16	9	4
Riding on ATVs/OHVs in desert	6	13	17	11
Boating	6	5	0	7
Attending Medjool Date Festival	4	32	0	0
Attending Welcome Back Winter Visitor Bash	2	7	0	0
Riding motorcycles	2	4	0	4
Attending Lettuce Festival	n/a	34	5	4
Attending Midnight at the Oasis	1	39	0	4
Attending a sporting event	1	2	0	0
Hunting	0	2	0	0
Visit a military site	n/a	21	0	22
Visiting a date farm or other ag attraction	n/a	34	26	19
Other activities	14% Birdwatching, camping, church, cross to Mexico, Date farms	5% Quilting, rock hounding	13% Outdoor/flea market, dental	30% Family, business, tennis, swimming @ Yuma East, Mexico, events in clubhouse, stayed in 2 <sup>nd</sup> home

**Table B-5. Tourist Attraction Visits** (n/a means not asked in the survey instrument)

	Visitor Info Center	Events	RV Parks	Home/Mobile Owners
<b>n or number of respondents in subsample to sample</b>	224/481	56/314	26/305	329349
<b>Attractions visited during visit (multiple responses allowed)</b>	n/a	n/a		
Historic downtown Yuma and Riverfront			85%	43%
Cocopah, Paradise or Quechan Casinos			30	29
Yuma Quartermaster Depot			30	10
Martinez Lake or Fisher's Landing			20	24
Castle Dome Mines Museum			10	5
Yuma Art Center/Historic Theatre			10	10
Sanguinetti House Museum			5	0
Yuma Territorial Prison			5	5
Camel Farm			0	5%
Kofa, Imperial or Cibola NWR			0	0
Imperial Sand Dunes NRA			0	5
Other			0	19% Bird Park, Wildlife Preserve

**Table B-6. Tourist Experience – Transportation and Lodging** (n/a means not asked in the survey instrument)

	Visitor Info Center	Events	RV Parks	Home/Mobile Owners
<b>n or number of respondents in subsample to sample</b>	224/481	56/314	26/318	29/349
<b>Transportation used during visit in Yuma</b> (multiple answers allowed)				
Own vehicle	71%	82%	92%	79%
Rental vehicle	15	9	8	21
Airplane	3	2	0	0
Own RV	30	25	29	3
Rental RV	0	0	0	0
Tour bus	3	0	4	0
Motorcycle	<1	5	0	0
Other	6% Bikes, Shuttles	9% Bikes, City Shuttle	8% RZRUTV	0
<b>Lodging used during visit in Yuma</b> (multiple answers allowed)				
Owned second home	0%	0%	0%	35%
Owned mobile home	0	0	4	14
RV parked on owned lot	34 (all types combined)	5	5% (Palms, Adobe)	0
RV on other owned lot (not RV park)		22	0	24
RV on rented lot		1	91	0
Hotel or motel, including extended stay facility	45	33	10	24
Bed and Breakfast	2	0	0	0
Private residence of friend or relative	8	19	0	7
Rental apartment or home	3	0	0	0
Campground (paid, developed)	12 (both combined)	15	18	0
Campground (dispersed, public land)		13	0	4
Timeshare	0	0	0	0

**Table B-7. Tourist Rating of Yuma County as a Destination** (n/a means not asked in the survey instrument)

Scale: 1=Strongly Disagree; 5=Strongly Agree (SA)	Visitor Info Center	Events	RV Parks	Home/Mobile Owners
<b>n or number of respondents in subsample to sample</b>	224/481	56/314	26/318	29/349
<b>Current Visit</b>	n/a	n/a		
Yuma County is one of the best destinations I have ever visited as a winter destination.			3.3 mean; 35% SA/A	3.7 mean 64% SA/A
I am pleased to have visited Yuma County.			4.1; 80%	4.0; 86%
I enjoyed myself in Yuma County this winter season.			4.0; 75%	4.0; 80%
<b>Future Visit Next Winter</b>	n/a	n/a		
I will say positive comments about Yuma County to others.			4.0; 75%	4.1; 90%
I will return to Yuma County next year.			3.9; 75%	4.1; 83%
I will return to Yuma County in the next 3 to 5 years.			3.7; 74%	4.2; 85%

## Appendix C. Open-ended comments

### C-1. Yuma RV park winter visitor open-ended questions

#### Question 27. Are there any ways your stay in Yuma Country could have been made better?

No.	n (Total: 65)	Themes	Details	Quotations
1	14	Roads	Road extension (extend 40 <sup>th</sup> street to Walmart) Repairing and paving roads (32 <sup>nd</sup> , 10E, road outside of Westwind) Good schedule for road construction to avoid busy tourist season	Repair & pave 32 <sup>nd</sup> and 10E  Pave the road on the east side of the Westwind RV park as the dust is unbearable
2	10	Recreation	More wins at Casino/Thursday winning night More and better hiking trails/More senior hikes More and better biking trail More pools More golf courses	Better maintained hiking trails. Access to Trailheads that are drivable by car. Less windy/sandy.
3	8	Environment	Better air quality Climate change Sewage treatment More trees Garbage control	I know water is a precious commodity, however, more trees /greenery alongside the road would be better
4	8	Tourism services	More info about tourism places Better tourist info website Cheaper prices for food Discounts More goods and services Better event organization	We attended Lettuce Days, which was a total bust this year. It was mainly food vendors and a band
5	8	Traffic & Transport	Educating drivers Better law enforcement Better public transport	Better traffic control on S. Frontage Rd. South bypass for S. Frontage Rd.

No.	n (Total: 65)	Themes	Details	Quotations
			Traffic control at certain areas More bike paths More convenient air travel	
6	6	Public services	No extra expense on emergency service & Fast emergency service Better drinking water Better internet	Ambulance and Fire Service that is not an extra expense in the Foothills
7	3	Foreign tourists	Faster border custom service Better incentive, service and health support Better exchange rate	Better incentive, service and health support for Canadian snowbirds
8	3	Commerce, Dining & Shopping	Lower sales tax More check out cashiers at Walmart More grocery stores	More check out cashiers at Walmart on 32 <sup>nd</sup> street. There are only about 3-5 most of the times.
9	3	Community	More volunteer opportunities More community sports Dog friendly neighbors	I was disappointed in the tennis. Pickle ball has replaced it so there aren't any community programs
10	1	Employment	More part-time job	I would like to get a part time job we just bought a house there and I need something to stay busy
11	1	Accommodation	Rules enforcement at RV parks	RV park rules



**Question 28. Is there anything that might hinder you from returning to Yuma County as your primary vacation destination or seasonal residence?**

No.	n (Total: 131)	Themes	Details	Quotations
1	86	Health & Age	Old Not in good health Health insurance cost	
2	23	Prices & Taxes	Increasing cost (RV park rent) Exchange rate Gas price Increased RV Park rent Higher sales tax Additional taxes or fees on visitors	
3	4	Fitness, Sport & Recreation	No tennis Desolate countryside Lack of things to do	
4	4	Environment	Air and water quality Garbage	
5	2	Accommodation	Difficult to find a close accommodation RV problems	
6	2	Politics	Arizona politics is not inclusive Trump	
7	2	Roads & Traffic	Dirt roads and bad traffic	
8	2	Safety	Crime rate & drugs	
9	6	Other	Rude people Taking care of pets The lack of support from the state and city for incentive to snowbirds Limited number of days in the US. Long distance to Yuma Want to experience new places	The number of days that Canadians are allowed to be in the US. It should be easier for us to stay longer.  Length of the drive from Missouri to Yuma.

**Question 29. What public or private facilities would you especially like to see developed in Yuma County?**

No.	n (Total: 73)	Facilities	Details	Quotations
1	20	Commerce, Dining & Shopping	Bank of America, Macy's, Costco, Les Schwab, Trader Joes, Tim Hortons Spray car wash in Foothills More grocery stores (especially at Foothills) More restaurants	
2	18	Fitness, Sport & Recreation	More sporting events, more baseball games Pickle ball, tennis, racquetball, winter baseball Nicer/more golf courses Regular hockey bus trips Car or motorcycle race track Bigger gym, Public pools Airshow, Music concert Ballroom dancing Casino closer More dinner theatres More guided tours Fishing opportunities/Improved hiking trails	Tennis because the weather is perfect if you could find players  As avid hikers, need to improve hiking trails and access to them with cars/trucks.
3	17	Traffic & Transport	Bike path (especially in Foothills area) Buses to Mexico border Direct flights from Calgary Enforcement speeders and red light, DUI Improve access to Westwind Park. i.e. traffic light for safety. More public transportation Traffic signal coming out of Westwind RV park onto E. 32nd St	
4	8	Roads	Better roads More sidewalks Pave roads (E 10th Ave, road behind East Wall)	

No.	n (Total: 73)	Facilities	Details	Quotations
5	5	Environment	Trash control More green areas	
6	3	Community	A YMCA in the Foothills area Off leash dog park Another hospital	
7	2	RV Park	Improved internet access in RV resort Improved RV Park	Most RV parks are outdated and restrict large RV units from parking. Most of them try to cram big RV

## C-2. Yuma home/mobile owner winter visitor open-ended questions

### Question 27. Are there any ways your stay in Yuma Country could have been made better?

No.	n (Total: 85)	Themes	Details
1	24	Public services	Less cost of water and sewer in Foothills Less house taxes/Less taxes Lower cost when we are not living here Lower our electric bill Community center Contract with Spectrum Mail service/ better way of viewing upcoming events More police Bigger post office Public swimming in Foothills Simplify TV Things to do in the hospital Water pressure and sewer system in Foothills Wider variety of news casting
2	19	Recreation	More: music, theaters, activities, activities geared to baby boomers, cultural experiences Artworks, Museums, Classical music Biking trails Cheaper more and better golf courses Don't let parts of Barry Goldwater and Kofa be closed to jeep clubs Off-road vehicles should not be allowed on the desert Entertainment centers for children Improve Lettuce festival Looser slots at the casinos More and less expensive agricultural tours Guided trips out to the desert
3	17	Roads	Better road Better street maintenance

No.	n (Total: 85)	Themes	Details
			Open McPherson pass road Roads need repaired in town and foothills Less road construction/Too many road works during winter months
4	11	Commerce, Dining & Shopping	Costco More grocery stores in Foothills area More shops and businesses in the Foothills More restaurants, In-n-out Better and healthier restaurants
5	8	Traffic & Transport	Airport Less traffic Set aside traffic control in construction zones when no work is being done. Expand Foothills. Stop light at 32nd
6	6	Environment	Better air quality and water quality Clean up sewer smell/ Less sewer smell in the Foothills Cleanliness Less wind

*Home owners who stayed in Yuma less than 30 nights in 2017-18 winter season made these comments: better coffee shops, cheaper golf, public safety (gang activity & drugs), more emphasis on Colorado River activities, less Snowbirds*

**Question 28. Is there anything that might hinder you from returning to Yuma County as your primary vacation destination or seasonal residence?**

No.	n (Total: 117)	Themes	Details
1	96	Health & Age	Not in good health, Old age
2	5	Prices & Taxes	Cost of gas Increase in taxes and fees
3	4	Environment	Air quality Sewer smell in the Foothills
4	4	Public services	Hospital facilities need improvement Lack of good water Long waits at emergency room
5	8	Other	Crime Sold Yuma home Tired of the same old thing, year after year Weather

**Question 29. What public or private facilities would you especially like to see developed in Yuma County?**

No.	n (Total: 91)	Facilities	Details
1	29	Commerce, Dining & Shopping	Costco, Macys, Hardware stores More car wash operations More shopping in Old Downtown Yuma More grocery stores More restaurants/ Full-service restaurant/Red Robin
2	29	Fitness, Sport & Recreation	More events in Old Downtown Yuma Wildlife viewing, star gazing, waterpark, better PBS shows, theaters, shows, live events, museums Bingo, dog racing Entertainment for children Bike trails Boat rides on the Colorado River Shooting range Golf courses Gym More public outdoor pickle ball courts Sports complex in Foothills area
3	18	Public services	Better water system in Foothills Better cell phone reception Better service for handicap Stronger senior centers, Care for elderly and disabled Medical facilities, Small hospital in the Foothills Community pool, dog park, public park in Foothills More newspaper
4	6	Roads	40th street needs to be continued from Foothills Fortuna to Walmart Bike/walking path from Yuma to Foothills More developed walking areas for people and pets More streets, roads need to be improved
5	4	Traffic & Transport	Better airline support, better flights, train station
6	3	Environment	Sewer smells need to be fixed
7	2	Education	Four-year college, Spanish classes

## Appendix D. Questionnaires

### D-1. Visitor Information Center Survey

**Visitor Information Center Survey** Date: \_\_\_\_\_ Time: \_\_\_\_\_ Surveyor initials: \_\_\_\_\_

*This research study on Yuma Visitor Information Center is conducted by Yuma Visitors Bureau and the Arizona Office of Tourism. Your participation in this research is voluntary. You can withdraw or refuse to answer any question without penalty. Your participation in this study will contribute to a better understanding of the needs of Visitor Information Centers. Your responses will be kept confidential. If you have any questions about this project at any time, please contact Yuma Visitor Bureau at [info@visityuma.com](mailto:info@visityuma.com), (928)783-0071.*

1. How many years have you been a tourist or a winter visitor in Yuma, Arizona? *(check one)*  
☐ One/first year      ☐ 6-10 years      ☐ 16-20 years      ☐ Not sure  
☐ 2-5 years      ☐ 11-15 years      ☐ 21+ years
2. Is Yuma your main destination for this trip? *(check one)*  
☐ Yes      ☐ No, what is your main destination? \_\_\_\_\_
3. How many nights will you stay in Yuma this winter? \_\_\_\_\_ # of nights
4. What date did you arrive in Yuma this winter? \_\_\_\_ / \_\_\_\_ / \_\_\_\_ (month, day, year)
5. What date do you plan to leave Yuma this winter? \_\_\_\_ / \_\_\_\_ / \_\_\_\_ (month, day, year)
6. Which of the following leisure activities have you participated in or will you likely participate in during your visit or stay in Yuma this winter? *(Check all that apply)*  

<input type="checkbox"/> Visit a national, state or regional park	<input type="checkbox"/> Visit a museum, art gallery or historic site
<input type="checkbox"/> Attend a live performance	<input type="checkbox"/> Go sightseeing or touring
<input type="checkbox"/> Visit a casino	<input type="checkbox"/> Go shopping
<input type="checkbox"/> Visit the Yuma Visitor Center	
<input type="checkbox"/> Take an ATV (All Terrain Vehicles)/OHV (Off-Highway Vehicle) tour in the desert	
<input type="checkbox"/> Go walking/hiking/biking	<input type="checkbox"/> Go motorcycle riding
<input type="checkbox"/> Go golfing or attend a golfing event	<input type="checkbox"/> Go hunting
<input type="checkbox"/> Go boating (including sailing, kayaking, canoeing, and motorized boating)	
<input type="checkbox"/> Attend the festival - Welcome Back Winter Visitor Bash	
<input type="checkbox"/> Attend the festival - Yuma Medjool Date Festival	
<input type="checkbox"/> Attend the festival - Midnight at the Oasis	
<input type="checkbox"/> Attend a boat show, car show, home show or gem show	
<input type="checkbox"/> Participate in or attend a sporting event other than golf	
<input type="checkbox"/> Engage in an artistic pursuit such as photography, painting or jewelry making	
<input type="checkbox"/> Other, please specify: _____	
7. Since arriving to Yuma, what transportation have you used or will you use during your visit? *(Check all that apply)*  

<input type="checkbox"/> Own Vehicle	<input type="checkbox"/> Own RV	<input type="checkbox"/> Motorcycle
<input type="checkbox"/> Rental Vehicle	<input type="checkbox"/> Rental RV	<input type="checkbox"/> Other, please specify: _____
<input type="checkbox"/> Airplane	<input type="checkbox"/> Tour Bus	

Survey continues on reverse side ➔



8. What type of lodging are you using in Yuma? *(Check all that apply)*
- ☐ Hotel/motel including an extended stay facility      ☐ A bed and breakfast  
☐ A private residence of a friend or relative      ☐ A campground  
☐ An apartment, home, townhouse or condo that you rented  
☐ A second home (vacation home, cabin, or townhouse that you own or are buying)  
☐ A RV or mobile home park: \_\_\_\_\_ name of property
9. What was the most important factor that FIRST made you consider visiting or staying in Yuma? *(check one)*
- ☐ An advertisement      ☐ A newspaper or magazine article  
☐ A travel or RV show      ☐ A television or radio program  
☐ Word of mouth      ☐ A previous trip to the area  
☐ Visit Yuma Website (Yuma CVB)      ☐ Passing through/On a road trip  
☐ Visit Yuma Visitor Guide  
☐ Website or travel literature from the Arizona Office of Tourism  
☐ Friends/Family members are staying in Yuma  
☐ Cost of a winter stay in Yuma  
☐ Available accommodations on RV/Mobile spaces  
☐ Where we usually visit was impacted by natural disasters  
☐ Other \_\_\_\_\_
10. How many people are in your travel party? *(include yourself and fill in number for each space)*
- \_\_\_\_\_ # of Women      \_\_\_\_\_ # of Men      \_\_\_\_\_ # of Children
11. Who is traveling with you on this trip? *(check one)*
- ☐ Friends only      ☐ Family only      ☐ Family and Friends  
☐ Organized group tour      ☐ Business associates      ☐ Traveling alone
12. What is the postal code (zip) at your primary residence? \_\_\_\_\_ postal code (zip)  
 If this is not the U.S., what country? \_\_\_\_\_ country name
13. What is your gender?      ☐ Male      ☐ Female
14. What is your age? \_\_\_\_\_ years
15. Are you retired (partially or fully)?      ☐ Yes - Retired      ☐ No - Not Retired

*Thank you so much for your participation. This survey will help to estimate the economic impact of winter or snowbird tourism in Yuma, AZ. We also need additional information later in your visit or stay. Would you be willing to participate in a follow-up survey? If so, please provide your email address here. We will send a survey close to your departure date. A \$20 gift card will be given to study participant as an incentive to take this survey through the use of a drawing each month.*

Email address: \_\_\_\_\_

## D-2. Event Attendee Survey

**Yuma Visitor Survey (Midnight at the Oasis)** Date: Mar/2-3/18 Time: \_\_\_\_\_ Surveyor initials: \_\_\_\_\_

This research study is conducted by Arizona State University for Visit Yuma, Yuma County, and the Arizona Office of Tourism. Your participation in this research is voluntary. You can withdraw or refuse to answer any question without penalty. Your participation in this study will contribute to a better understanding of visitor interests and the economic impact of tourism in Yuma. Your responses will be kept confidential. If you have any questions about this project at any time, please contact Yuma Visitor Bureau at [info@visityuma.com](mailto:info@visityuma.com), (928)783-0071.

1. How many years have you been a tourist or a winter visitor in Yuma, Arizona? (*check one*)  
☐ One/first year      ☐ 6-10 years      ☐ 16-20 years      ☐ Not sure  
☐ 2-5 years      ☐ 11-15 years      ☐ 21+ years
2. Is Yuma your main destination for this trip? (*check one*)  
☐ Yes      ☐ No, what is your main destination? \_\_\_\_\_
3. What date did you arrive in Yuma this winter? \_\_\_\_ / \_\_\_\_ / \_\_\_\_ (month, day, year)
4. What date do you plan to leave Yuma this winter? \_\_\_\_ / \_\_\_\_ / \_\_\_\_ (month, day, year)
5. How many nights will you stay in Yuma this winter? \_\_\_\_\_ # of nights
6. Which of the following leisure activities have you participated in or will you likely participate in during your visit or stay in Yuma this winter? (*Check all that apply*)  

<input type="checkbox"/> Visit a national, state or regional park	<input type="checkbox"/> Visit a museum, art gallery or historic site
<input type="checkbox"/> Attend a live performance	<input type="checkbox"/> Go sightseeing or touring
<input type="checkbox"/> Visit a casino	<input type="checkbox"/> Go shopping
<input type="checkbox"/> Visit the Yuma Visitor Center	<input type="checkbox"/> Visit a date farm or other agricultural attraction
<input type="checkbox"/> Visit a military site (Proving Ground, Marine Base, etc.)	
<input type="checkbox"/> Ride an ATV (All Terrain Vehicles)/OHV (Off-Highway Vehicle) tour in the desert	
<input type="checkbox"/> Go walking/hiking/biking	<input type="checkbox"/> Go motorcycle riding
<input type="checkbox"/> Go golfing or attend a golfing event	<input type="checkbox"/> Go hunting
<input type="checkbox"/> Go boating (including sailing, kayaking, canoeing, and motorized boating)	
<input type="checkbox"/> Attend the festival - Welcome Back Winter Visitor Bash (December 6, 2017)	
<input type="checkbox"/> Attend the festival - Yuma Medjool Date Festival (January 27, 2018)	
<input type="checkbox"/> Attend the festival - Yuma Lettuce Festival (February 24, 2018)	
<input type="checkbox"/> Attend the festival - Midnight at the Oasis (March 1-4, 2018)	
<input type="checkbox"/> Attend a boat show, air show, car show, home show or gem show	
<input type="checkbox"/> Participate in or attend a sporting event other than golf	
<input type="checkbox"/> Engage in an artistic pursuit such as photography, painting or jewelry making	
<input type="checkbox"/> Other, please specify: _____	
7. Since arriving to Yuma, what transportation have you used or will you use during your visit? (*Check all that apply*)  

<input type="checkbox"/> Own Vehicle	<input type="checkbox"/> Own RV	<input type="checkbox"/> Motorcycle
<input type="checkbox"/> Rental Vehicle	<input type="checkbox"/> Rental RV	<input type="checkbox"/> Other, please specify: _____
<input type="checkbox"/> Airplane	<input type="checkbox"/> Tour Bus	

8. What type of lodging are you using in Yuma? (*Check all that apply*)
- ☐ Hotel/motel including an extended stay facility      ☐ A campground (e.g., paid, developed)  
☐ A bed and breakfast      ☐ Other camping (e.g., dispersed on public land)  
☐ A private residence of a friend or relative      ☐ A timeshare you hold  
☐ An apartment, home, townhouse or condo that you rented  
☐ A second home (vacation home, cabin, or townhouse that you own or are buying)  
☐ A rented space or home at an RV or mobile home park: \_\_\_\_\_ name of park  
☐ A home or lot that I/my group owns at an RV or mobile home park: \_\_\_\_\_ name of park
9. What was the most important factor that FIRST made you consider visiting or staying in Yuma? (*check one*)
- ☐ An advertisement      ☐ A newspaper or magazine article  
☐ A travel or RV show      ☐ A television or radio program  
☐ Word of mouth      ☐ A previous trip to the area  
☐ Visit Yuma Website (Yuma CVB)      ☐ Passing through/On a road trip  
☐ Visit Yuma Visitor Guide      ☐ Weather  
☐ Website or travel literature from the Arizona Office of Tourism  
☐ Friends/Family members are staying in Yuma  
☐ Affordability of Yuma  
☐ Available accommodations on RV/Mobile spaces  
☐ Where we usually visit was impacted by natural disasters  
☐ Other \_\_\_\_\_
10. How many people are in your travel party? (include yourself and fill in number for each space)
- \_\_\_\_\_ # of Women      \_\_\_\_\_ # of Men      \_\_\_\_\_ # of Children
11. Who is traveling with you on this trip? (*check one*)
- ☐ Friends only      ☐ Family only      ☐ Family and Friends  
☐ Organized group tour      ☐ Business associates      ☐ Traveling alone
12. What is the postal code (zip) at your **primary** residence? \_\_\_\_\_ postal code (zip)  
 If this is not the U.S., what country? \_\_\_\_\_ country name
13. What is your gender?      ☐ Male      ☐ Female
14. What is your age? \_\_\_\_\_ years
15. Are you retired (partially or fully)?      ☐ Yes      ☐ No
16. Are you working while in Yuma? (*check all that apply*)
- ☐ No      ☐ Yes – part or full time during stay in Yuma      ☐ Yes – I work remotely  
☐ Yes – other: (please describe) \_\_\_\_\_

Thank you so much for your participation. We will also need additional information later in your visit or stay. Would you be willing to participate in a follow-up survey? If so, please provide your email address here. We will email a survey close to your departure date.

Email address: \_\_\_\_\_

### D-3. RV and Mobile Home Park Survey

**Yuma RV & Mobile Home Park Survey** Name of Park: \_\_\_\_\_ Date: \_\_\_\_\_

Dear Yuma County Winter Visitor,  
Arizona State University is conducting a research study on Yuma County winter visitors for Visit Yuma Visitors Bureau, Yuma County, and the Arizona Office of Tourism. Your participation in this study will contribute to a better understanding of the economic impacts of tourism in Yuma County. Your participation in this research is voluntary. You can withdraw or refuse to answer any question without penalty. Your responses will be kept confidential. If you have any questions about this project at any time, please contact Yuma Visitor Bureau at [info@visityuma.com](mailto:info@visityuma.com), (928)783-0071 or Woojin Lee [Woojin.Lee.1@asu.edu](mailto:Woojin.Lee.1@asu.edu).

Return the completed survey to the RV park office before February 28, 2018.  
One survey per household please. We really appreciate your assistance.

1. Are you staying overnight in Yuma County (e.g., Yuma, Wellton, Somerton, Dateland, San Luis)? *(check one)*  
☐ Yes ☐ No
2. Is Yuma County your main destination for this trip? *(check one)*  
☐ Yes ☐ No, what is your main destination(s)? \_\_\_\_\_
3. Are you a winter visitor? (defined as someone from out of state or outside of the USA who is visiting Arizona between November and May for at least 30 consecutive days) *(check one)*  
☐ Yes ☐ No
4. What date did you arrive in Yuma County this winter? \_\_\_\_ / \_\_\_\_ / \_\_\_\_ (month, day, year)
5. What date do you plan to leave Yuma County this winter? \_\_\_\_ / \_\_\_\_ / \_\_\_\_ (month, day, year)
6. During this visit, have you left Yuma County and returned? *(check one)*  
☐ No ☐ Yes If so, where did you go? \_\_\_\_\_ # of nights \_\_\_\_\_
7. How many total nights will you stay in Yuma County this winter? *(fill in or we can calculate)*  
\_\_\_\_\_ # of nights
8. How many years in your lifetime have you been visiting Yuma County? *(check one)*  
☐ One/first year ☐ 6-10 years ☐ 16-20 years ☐ Not sure  
☐ 2-5 years ☐ 11-15 years ☐ 21+ years

This next section asks about your visit and activities in Yuma County during 2017-2018.

9. What was the **most important factor that FIRST** made you consider visiting or staying in Yuma County? *(check one)*  

<input type="checkbox"/> An advertisement	<input type="checkbox"/> A newspaper or magazine article
<input type="checkbox"/> A travel or RV show	<input type="checkbox"/> A television or radio program
<input type="checkbox"/> Word of mouth	<input type="checkbox"/> A previous trip to the area
<input type="checkbox"/> Visit Yuma Website (Yuma CVB)	<input type="checkbox"/> Passing through/On a road trip
<input type="checkbox"/> Visit Yuma Visitor Guide	<input type="checkbox"/> Winter weather in Yuma area
<input type="checkbox"/> Website or travel literature from the Arizona Office of Tourism	
<input type="checkbox"/> Friends/Family members are staying in Yuma	
<input type="checkbox"/> Affordability of Yuma	
<input type="checkbox"/> Available accommodations on RV/Mobile spaces	
<input type="checkbox"/> Where we usually visit was impacted by natural disasters	
<input type="checkbox"/> Other, please specify: _____	

Survey continues on next page →

10. Which of the following **leisure activities** have you participated in or will you likely participate in during your visit or stay in Yuma County this winter? (*Check all that apply*)

- |  |   |
|--|---|
| <input type="checkbox"/> Visit a national, state or regional park                                      | <input type="checkbox"/> Visit a museum, art gallery or historic site       |
| <input type="checkbox"/> Attend a live performance   | <input type="checkbox"/> Go sightseeing or touring                          |
| <input type="checkbox"/> Visit a casino  | <input type="checkbox"/> Go shopping  |
| <input type="checkbox"/> Visit the Yuma Visitor Center   | <input type="checkbox"/> Visit a date farm or other agricultural attraction |
| <input type="checkbox"/> Visit a military site (Proving Ground, Marine Base, etc.)                     |   |
| <input type="checkbox"/> Ride ATVs (All Terrain Vehicles)/OHVs (Off-Highway Vehicles) in the desert    |   |
| <input type="checkbox"/> Go walking/hiking/biking  | <input type="checkbox"/> Go motorcycle riding                               |
| <input type="checkbox"/> Go golfing or attend a golfing event  | <input type="checkbox"/> Go hunting   |
| <input type="checkbox"/> Go boating (including sailing, kayaking, canoeing, and motorized boating)     |   |
| <input type="checkbox"/> Attend the festival - Welcome Back Winter Visitor Bash (December 6, 2017)     |   |
| <input type="checkbox"/> Attend the festival - Yuma Medjool Date Festival (January 27, 2018)           |   |
| <input type="checkbox"/> Attend the festival - Yuma Lettuce Festival (February 24, 2018)               |   |
| <input type="checkbox"/> Attend the festival - Midnight at the Oasis (March 1-4, 2018)                 |   |
| <input type="checkbox"/> Attend a boat show, air show, car show, home show or gem show                 |   |
| <input type="checkbox"/> Participate in or attend a sporting event other than golf                     |   |
| <input type="checkbox"/> Engage in an artistic pursuit such as photography, painting or jewelry making |   |
| <input type="checkbox"/> Other, please specify: _____  |   |

11. Which **attractions** you have visited or plan to visit in Yuma County this trip? (*Check all that apply*)

- |   |  |
|---|--|
| <input type="checkbox"/> The Camel Farm                       | <input type="checkbox"/> Martinez Lake or Fisher's Landing |
| <input type="checkbox"/> Castle Dome Mines Museum             | <input type="checkbox"/> Sanguinetti House Museum          |
| <input type="checkbox"/> Cocopah, Paradise or Quechan Casinos | <input type="checkbox"/> Yuma Art Center/Historic Theatre  |
| <input type="checkbox"/> Historic downtown Yuma/riverfront    | <input type="checkbox"/> Yuma Quartermaster Depot          |
| <input type="checkbox"/> Kofa, Imperial, or Cibola NWR        | <input type="checkbox"/> Yuma Territorial Prison           |
| <input type="checkbox"/> Imperial Sand Dunes NRA              |  |
| <input type="checkbox"/> Other, please specify: _____         |  |

12. Since arriving to Yuma County, what **transportation** have you used or will you use during your visit? (*Check all that apply*)

- |   |                                    |   |
|---|------------------------------------|---|
| <input type="checkbox"/> Own Vehicle    | <input type="checkbox"/> Own RV    | <input type="checkbox"/> Motorcycle                   |
| <input type="checkbox"/> Rental Vehicle | <input type="checkbox"/> Rental RV | <input type="checkbox"/> Other, please specify: _____ |
| <input type="checkbox"/> Airplane       | <input type="checkbox"/> Tour Bus  |   |

13. What type of **lodging** are you using in Yuma County on this visit? (*Check all that apply*)

- |   |   |
|---|---|
| <input type="checkbox"/> Hotel/motel including an extended stay facility            | <input type="checkbox"/> A campground (e.g., paid, developed)           |
| <input type="checkbox"/> A bed and breakfast  | <input type="checkbox"/> Other camping (e.g., dispersed on public land) |
| <input type="checkbox"/> A private residence of a friend or relative                | <input type="checkbox"/> A timeshare you hold                           |
| <input type="checkbox"/> A rental apartment, home, townhouse or condo               |   |
| <input type="checkbox"/> An owned second home (vacation home, cabin, or townhouse)  |   |
| <input type="checkbox"/> A rented space or home at an RV or mobile home park: _____ | name of park  |
| <input type="checkbox"/> An owned lot or home at an RV or mobile home park: _____   | name of park  |

14. Who is travelling with you on this visit to Yuma County? (*check one*)

- |   |  |   |
|---|--|---|
| <input type="checkbox"/> Friends only         | <input type="checkbox"/> Family only         | <input type="checkbox"/> Family and Friends |
| <input type="checkbox"/> Organized group tour | <input type="checkbox"/> Business associates | <input type="checkbox"/> Traveling alone    |

15. How many people are in your travel party? (include yourself and fill in number for each space)  
 \_\_\_\_\_ # of Women \_\_\_\_\_ # of Men \_\_\_\_\_ # of Children

16. How many **total meals** has your party purchased or planned to purchase at a Yuma County restaurant? (fill in a number or zero)

\_\_\_\_\_ # of Breakfasts  
 \_\_\_\_\_ # of Lunches  
 \_\_\_\_\_ # of Dinners

17. Please estimate the total amount that **your travel party** expects to spend in Yuma County for the following categories (in U.S. dollars):

☐ Lodging/Accommodation \$ \_\_\_\_\_  
☐ Recreational Vehicle lot rental fees \$ \_\_\_\_\_  
☐ Restaurant food and drink \$ \_\_\_\_\_  
☐ Groceries \$ \_\_\_\_\_  
☐ Gas \$ \_\_\_\_\_  
☐ Entertainment spending, including casino \$ \_\_\_\_\_  
☐ Entrance fees, licenses, donations \$ \_\_\_\_\_  
☐ Other (explain below) \$ \_\_\_\_\_

**TOTAL** \$ \_\_\_\_\_

Define "other": \_\_\_\_\_

These expenses cover \_\_\_\_\_ (the number of) people.

18. Thinking about your stay in Yuma County, rate your agreement with each of the following statements:

	Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree
Yuma County is one of the best destinations I have ever visited as a winter destination.	1	2	3	4	5
I have ever visited as a winter destination.	1	2	3	4	5
I am pleased to have visited Yuma County.	1	2	3	4	5
I have enjoyed myself in Yuma County this winter season.	1	2	3	4	5

19. Thinking about next winter, rate your agreement with the following statements:

	Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree
I will say positive comments about Yuma County to others.	1	2	3	4	5
I will return to Yuma County next year.	1	2	3	4	5
I will return to Yuma County in the next 3-5 years.	1	2	3	4	5

Survey continues on back side ➔



This last section asks demographic questions.

20. What is the postal code (zip) at your **primary** residence? \_\_\_\_\_  
If this is not the U.S., what country? \_\_\_\_\_ *country name*
21. What is your gender? ☐ Male ☐ Female
22. What is your age? \_\_\_\_\_ years
23. Are you retired (partially or fully)? ☐ Yes ☐ No
24. Are you working while in Yuma? *(check all that apply)*  
☐ No ☐ Yes – part of fulltime during stay in Yuma ☐ Yes – I work remotely  
☐ Yes – other *(please describe)* \_\_\_\_\_
25. What is your ethnicity? *(check all that apply)*  
☐ White ☐ Hispanic or Latino ☐ Native American  
☐ Black or African American ☐ Asian/Pacific Islander ☐ Other \_\_\_\_\_
26. What is the highest level of education you have received? *(If currently enrolled, select highest degree achieved)*  
☐ Some high school ☐ Trade/vocational training ☐ Master's degree  
☐ High school graduate ☐ Associate's degree ☐ Professional degree  
☐ Some college ☐ Bachelor's degree
27. Are there any ways your stay in Yuma County could have been made better? *(describe below)*
28. Is there anything that might hinder you from returning to Yuma County as your primary vacation destination or seasonal residence? *(describe below)*
29. What public or private facilities would you especially like to see developed in Yuma County?  
*(describe below)*

**Thank you for your participation.  
Turn completed survey to the RV Park Office. They  
will send to ASU as a batch on February 28, 2018.**

#### D-4. Home/Mobile Owners (i.e. Non-Resident Property Owners) Survey



##### Yuma Non-Resident Property Owner Survey

The first set of questions ask about your recent stay in Yuma County.

1. Did you stay overnight in Yuma County (e.g., Yuma, Wellton, Somerton, Dateland, San Luis) this past winter, between November 2017 and May 2018? *(check one)*  
☐ Yes ☐ No (If no, skip to question 8)
2. Was Yuma County your main destination for this trip? *(check one)*  
☐ Yes ☐ No, what was your main destination(s)? \_\_\_\_\_
3. Were you a "winter visitor" to Arizona? (defined as someone from out of state or outside of the USA who is visiting Arizona between November and May for at least 30 consecutive days) *(check one)*  
☐ Yes ☐ No
4. What date did you arrive in Yuma County this past fall/winter? \_\_\_\_ / \_\_\_\_ / \_\_\_\_ (month, day, year)
5. What date did you leave Yuma County this past winter/spring? \_\_\_\_ / \_\_\_\_ / \_\_\_\_ (month, day, year)
6. During this visit, did you leave Yuma County and return? *(check one)*  
☐ No ☐ Yes If so, where did you go? \_\_\_\_\_ # of nights \_\_\_\_\_
7. How many total nights did you stay in Yuma County this winter? *(fill in or we can calculate)*  
\_\_\_\_\_ # of nights
8. How many years in your lifetime have you visited Yuma County? *(check one)*  
☐ One/first year ☐ 6-10 years ☐ 16-20 years ☐ Not sure  
☐ 2-5 years ☐ 11-15 years ☐ 21+ years
9. What was the most important factor that **FIRST** made you consider visiting or staying in Yuma County? *(review the full list and then check one)*

<input type="checkbox"/> An advertisement	<input type="checkbox"/> A newspaper or magazine article
<input type="checkbox"/> A travel or RV show	<input type="checkbox"/> A television or radio program
<input type="checkbox"/> Word of mouth	<input type="checkbox"/> A previous trip to the area
<input type="checkbox"/> Visit Yuma Website (Yuma CVB)	<input type="checkbox"/> Passing through/On a road trip
<input type="checkbox"/> Visit Yuma Visitor Guide	<input type="checkbox"/> Winter weather in Yuma area
<input type="checkbox"/> Website or travel literature from the Arizona Office of Tourism	
<input type="checkbox"/> Friends/Family members are staying in Yuma	
<input type="checkbox"/> Affordability of Yuma	
<input type="checkbox"/> Available accommodations on RV/Mobile spaces	
<input type="checkbox"/> Where we usually visit was impacted by natural disasters	
<input type="checkbox"/> Other, please specify: _____	

Survey continues on next page ➔



This next section asks about your visit and activities in Yuma County during 2017-2018.  
(If you did not visit Yuma County this past winter, please skip to Question 19)

10. Which of the following **leisure activities** did you participate in during your visit or stay in Yuma County this past winter/spring? (*Check all that apply*)

- ☐ Visited a national, state or regional park
- ☐ Visited a museum, art gallery or historic site
- ☐ Attended a live performance
- ☐ Went sightseeing or touring
- ☐ Visited a casino
- ☐ Went shopping
- ☐ Visited the Yuma Visitor Center
- ☐ Visited a date farm or other agricultural attraction
- ☐ Visited a military site (Proving Ground, Marine Base, etc.)
- ☐ Rode ATVs (All Terrain Vehicles)/OHVs (Off-Highway Vehicles) in the desert
- ☐ Went walking/hiking/biking
- ☐ Went motorcycle riding
- ☐ Went golfing or attended a golfing event
- ☐ Went hunting
- ☐ Went boating (including sailing, kayaking, canoeing, and motorized boating)
- ☐ Attended the festival - Welcome Back Winter Visitor Bash (December 6, 2017)
- ☐ Attended the festival - Yuma Medjool Date Festival (January 27, 2018)
- ☐ Attended the festival - Yuma Lettuce Festival (February 24, 2018)
- ☐ Attended the festival - Midnight at the Oasis (March 1-4, 2018)
- ☐ Attended a boat show, air show, car show, home show or gem show
- ☐ Participated in or attended a sporting event other than golf
- ☐ Engaged in an artistic pursuit such as photography, painting or jewelry making
- ☐ Other, please specify: \_\_\_\_\_

11. Which **attractions** did you visit in Yuma County this past winter/spring? (*Check all that apply*)

- ☐ The Camel Farm
- ☐ Martinez Lake or Fisher's Landing
- ☐ Castle Dome Mines Museum
- ☐ Sanguinetti House Museum
- ☐ Cocopah, Paradise or Quechan Casinos
- ☐ Yuma Art Center/Historic Theatre
- ☐ Historic downtown Yuma/riverfront
- ☐ Yuma Quartermaster Depot
- ☐ Kofa, Imperial, or Cibola NWR
- ☐ Yuma Territorial Prison
- ☐ Imperial Sand Dunes NRA
- ☐ Other, please specify: \_\_\_\_\_

12. After arriving to Yuma County this past winter/spring, what **transportation** did you use during your visit? (*Check all that apply*)

- ☐ Own Vehicle
- ☐ Own RV
- ☐ Motorcycle
- ☐ Rental Vehicle
- ☐ Rental RV
- ☐ Other, please specify: \_\_\_\_\_
- ☐ Airplane
- ☐ Tour Bus

13. What type of **lodging** did you use in Yuma County this past visit? (*Check all that apply*)

On a property that you own(ed):

- ☐ An owned site-built second home (house, condo, townhome, or cabin)
- ☐ An owned mobile home at a mobile home/RV park: \_\_\_\_\_ *name of park*
- ☐ An RV parked on an owned lot at an RV/mobile home: \_\_\_\_\_ *name of park*
- ☐ An RV or other temporary living structure placed on owned land *not* in an RV park

On a property that you do not own full-time:

- ☐ A rented space or home at an RV or mobile home park: \_\_\_\_\_ *name of park*
- ☐ Hotel/motel including an extended stay facility
- ☐ A campground (e.g., paid, developed)
- ☐ A bed and breakfast
- ☐ Other camping (e.g., dispersed, public land)
- ☐ A private residence of a friend or relative
- ☐ A timeshare you hold
- ☐ A rental apartment, home, townhouse or condo

14. Who traveled with you on this visit to Yuma County? (*check one*)  
☐ Friends only                      ☐ Family only                      ☐ Family and Friends  
☐ Organized group tour              ☐ Business associates              ☐ Traveled alone
15. How many people were in your travel party? (include yourself and fill in number for each space)  
                     # of Women                      # of Men                      # of Children
16. Please estimate how many **total meals** your party purchased at Yuma County restaurants: (fill in a number or zero)  
                     # of Breakfasts  
                     # of Lunches  
                     # of Dinners
17. Please estimate the total amount that **your travel party** spent in Yuma County during this winter/spring season for the following categories (in U.S. dollars):  
☐ Lodging/Accommodation (if applicable) \$ \_\_\_\_\_  
☐ Recreational Vehicle lot rental fees \$ \_\_\_\_\_  
☐ Restaurant food and drink \$ \_\_\_\_\_  
☐ Groceries \$ \_\_\_\_\_  
☐ Gas \$ \_\_\_\_\_  
☐ Entertainment spending, including casino \$ \_\_\_\_\_  
☐ Entrance fees, licenses, donations \$ \_\_\_\_\_  
☐ Other shopping (explain below) \$ \_\_\_\_\_
- TOTAL** \$ \_\_\_\_\_

Define "other": \_\_\_\_\_

These expenses cover \_\_\_\_\_ (the number of) people.

18. Thinking about your stay in Yuma County, rate your agreement with each of the following statements:
- |  | Strongly Disagree | Disagree | Neutral | Agree | Strongly Agree |
|--|-------------------|----------|---------|-------|----------------|
| Yuma County is one of the best destinations I have ever visited as a winter destination. | 1                 | 2        | 3       | 4     | 5              |
| I am pleased to have visited Yuma County.  | 1                 | 2        | 3       | 4     | 5              |
| I enjoyed myself in Yuma County this winter season.                                      | 1                 | 2        | 3       | 4     | 5              |
19. Thinking about next winter, rate your agreement with the following statements:
- |   | Strongly Disagree | Disagree | Neutral | Agree | Strongly Agree |
|---|-------------------|----------|---------|-------|----------------|
| I will say positive comments about Yuma County to others. | 1                 | 2        | 3       | 4     | 5              |
| I will return to Yuma County next year.                   | 1                 | 2        | 3       | 4     | 5              |
| I will return to Yuma County in the next 3-5 years.       | 1                 | 2        | 3       | 4     | 5              |

This last section asks demographic questions.

20. What is the postal code (zip) at your **primary** residence? \_\_\_\_\_  
If this is not the U.S., what country? \_\_\_\_\_ *country name*
21. What is **your** gender? ☐ Male ☐ Female
22. What is **your** age? \_\_\_\_\_ years
23. Are you retired (partially or fully)? ☐ Yes ☐ No
24. Did you work while in Yuma? (*check all that apply*)  
☐ No ☐ Yes – part or full-time during stay in Yuma ☐ Yes – I work remotely  
☐ Yes – other (*please describe*) \_\_\_\_\_
25. What is **your** ethnicity? (*check all that apply*)  
☐ White ☐ Hispanic or Latino ☐ Native American  
☐ Black or African American ☐ Asian/Pacific Islander ☐ Other \_\_\_\_\_
26. What is the highest level of education you have received? (*If currently enrolled, select highest degree achieved*)  
☐ Some high school ☐ Trade/vocational training ☐ Master's degree  
☐ High school graduate ☐ Associate's degree ☐ Professional degree  
☐ Some college ☐ Bachelor's degree
27. Are there any ways your stay in Yuma County could have been made better? (*describe below*)
28. Is there anything that might hinder you from returning to Yuma County as your primary vacation destination or seasonal residence? (*describe below*)
29. What public or private facilities would you especially like to see developed in Yuma County? (*describe below*)

Thank you for your participation.  
Please return this survey via U.S. mail in the enclosed postage-paid envelope or send to: ASU Center for Sustainable Tourism  
411 N. Central Ave. #550, Mailcode 4020, Phoenix, AZ 85004