

THE WILLIAMS 1995-96 VISITOR STUDY



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I. Highlights

- Visitors to the Williams area spent \$37 million in and around Williams in fiscal 1995-96.
- These visitor expenditures created \$20 million in income and 1,033 jobs.
- Total economic impacts of visitors to Williams resulted in 1,339 jobs and \$30 million in total income impacts in Coconino County.
- Visitors contributed much of the \$244,876 collected by the City of Williams in hotel, restaurant and bar taxes.
- Visitors are most likely to be in the City of Williams between 6 and 9 p.m.
- Almost 60 percent of all visitors come to the Williams area during the summer season (May through October).
- Twenty-eight percent of all visitor parties include at least one member with foreign citizenship and 22 percent of all visitor parties consist of visitors with international addresses.
- Thirty-six percent of all visitors are retired.
- Eighty-two percent of all visitor parties to Williams indicated that seeing the Grand Canyon is one of their most important reasons for visiting Williams.
- Twenty-six percent of all visitor parties rode the train to the Grand Canyon.
- Thirty-four percent of all visitor parties visited the train station in Williams.
- Twenty-six percent of all visitor parties visited historic downtown Williams.
- Winter visitors consist of a higher percentage of visitors over the age of 60, a lower percentage of children and a higher percentage of visitors with interest in historical sites and museums. Winter visitors are more likely to visit other Arizona destinations (particularly Phoenix) than are summer visitors.
- Summer visitors include larger numbers and percentage of outdoor recreation enthusiasts. More children are included among summer visitors. Summer visitors' total trip lengths are shorter than winter visitors' but they tend to stay 16 hours longer on average in the Williams area.
- Among the five types of visitors identified in the study, historic and international visitors make the largest per person per day expenditures in Williams. However, outdoor recreation visitors tend to spend the most time in the area.

II. Introduction

The Williams Visitor Study was conducted as part of the Arizona Council on Enhancing Recreation and Tourism's (ACERT) Rural Tourism Development Program and Arizona Cooperative Extension's Communities in Economic Transition (CET) program. The purpose of the study was to learn more about visitation to the community of Williams and surrounding areas. The study would not have been possible without the cooperation of local hotel, RV park and campground managers, and the Williams-Kaibab National Forest Visitor Center staff who oversaw the daily distribution of surveys to visitors throughout the year. It is our hope that the participants find the information contained in this report worth the time and effort they devoted to this project.

Design of the survey methodology and the analysis were conducted at The University of Arizona with the support of Federal and State CET funds. The main purpose of the study was to provide a clear picture of the types of visitors coming to Williams and what they spent while they were here. This information was then used to estimate total visitor expenditures in the area and as a basis for economic and fiscal impact analysis.

While the survey did reveal that the majority of visitors to Williams are coming to see the Grand Canyon, it also highlights other distinct groups such as outdoor recreation visitors and historic visitors who are interested in other activities on their trip. Highlights of the study are provided on the previous page and in the conclusions.

The survey methodology and the survey instrument are provided in Appendix A and B for the interested reader. Estimated total occupancy rates by month are available in Appendix C. Mail back surveys were distributed from a number of hotels, RV parks and campgrounds in Williams as well as from the Visitor Center. A total of 207 usable surveys were returned in the winter months (November through April), and 475 in the summer months (May through October). The overall response rate was approximately 45 percent. As with all survey results, these results are subject to errors due to non-response bias, recall bias, etc. While the confidence interval varies by question, the overall accuracy of the results presented here are usually within +/- five percent of the actual figure. Figures provided are based on weighted averages for each visitor type (large hotel, small

hotel, etc.) and total number of visitors of each type. The only exceptions to this are that all figures concerning ratings of local facilities are simple averages for survey respondents. Likewise, the figures presented on the visitor profile section are based on simple averages.

The surveys were segmented into four groups for the purpose of the analysis. Visitors were classified as day trip visitors if they did not spend the night in Williams, campers or RV-ers if they stayed in a campground or RV park, visitors to a small hotel if they stayed in a hotel with 30 rooms or less and visitors to a large hotel if they stayed in a hotel with more than 30 rooms. Because of the limited number of surveys in each category, for each season, only seasonal totals are provided for most of the analysis. The only exceptions are the expenditure data.

The total number of day trip visitors was estimated by multiplying the percentage of all surveys completed at the Visitor Center by people not spending the night in Williams by the total number of visitors to the Center. This is a conservative estimate of total day trip visitors, as some day visitors did not stop at the Visitor Center.

For the other three categories, an estimate of total room nights was reached by multiplying monthly occupancy rates by total number of rooms at each establishment, by the number of days in the month, and then summing for each season. Since occupancy data were not available for all establishments, the weighted average occupancy rate was multiplied by the number of rooms and number of days in the month for the other properties.

III. Visitor Expenditures

Visitor expenditures in the Williams area varied between \$23 per party per day for winter day trip visitors to \$157 per party per night for visitors staying at hotels with 30 rooms or more (i.e., large hotels). The average expenditures for each type of visitor group for both the winter and summer seasons are presented in Tables 1 and 2. An

estimated 469,000 visitors spent time in the Williams area in fiscal year 1995-96. These visitors spent 328,720 visitor party days in the Williams area.

Total expenditures per visitor party day are presented in Table 3. These are expenditure estimates for July 1, 1995 to June 30, 1996. Winter month visitors spent a total of \$11.8 million dollars in the Williams area, while summer visitors spent \$25.5 million. Winter expenditures are just under half the expenditures of summer visitors. The total expenditure in Williams of all visitors was approximately \$37.3 million during the fiscal 1995-96 year.

Of this amount, approximately half was spent on lodging or accommodations (including campground fees). Another quarter was spent on food in local restaurants. The percentage spent on other categories are presented in Figure 1. About three quarters of total visitor expenditures was made by those visitors staying at the larger hotels (Figure 2).

Ninety-five percent of all visitors to Williams spent money on a place to stay and 86 percent spent money in local restaurants. More than

Table 1. Average Expenditures Per Visitor Party Night for Winter Visitors.¹

	Day Trip	Camping/RV²	Small Hotel³	Large Hotel	Total
	----- (in dollars) -----				
Lodging	0.00	23.08	38.59	73.28	54.88
Restaurants	6.00	8.41	24.69	34.57	26.70
Grocery Stores	3.77	6.94	3.88	2.59	3.76
Gasoline Stations	4.38	11.57	7.79	5.56	7.19
Other, Retail and Attractions	8.52	21.22	19.32	21.94	21.01
Total	\$22.67	\$71.22	\$94.27	\$137.94	\$113.54

¹ Winter season runs from November through April.
² Camping/RV includes campgrounds and RV parks.
³ Small hotels have 30 rooms or less.

Table 2. Average Expenditure Per Visitor Party Night for Summer Visitors.¹

	Day Trip	Camping/RV²	Small Hotel³	Large Hotel	Total
	----- (in dollars) -----				
Lodging	0.00	14.59	50.23	82.14	52.86
Restaurants	9.84	10.71	26.44	37.48	26.46
Grocery Stores	2.98	7.37	4.01	4.31	5.02
Gasoline Stations	8.59	6.19	7.03	8.42	7.61
Other, Retail and Attractions	20.93	10.15	33.08	24.63	21.64
Total	\$42.34	\$49.01	\$120.79	\$156.98	\$113.59

¹ Summer season runs from May through October.
² Camping/RV includes campgrounds and RV parks.
³ Small hotels have 30 rooms or less.

Table 3. Total Expenditures by Visitors to the Williams Area, July 1, 1995–June 30, 1996.

	Winter	Summer	Total
----- (in thousand dollars) -----			
Lodging	5,719	11,868	17,587
Restaurants	2,782	5,940	8,722
Grocery Stores	392	1,127	1,519
Gasoline Stations	749	1,708	2,457
Other, Retail and Attractions	2,190	4,856	7,046
Total	\$11,832	\$25,499	\$37,331

Figure 1. How Visitors Spent Their Money.

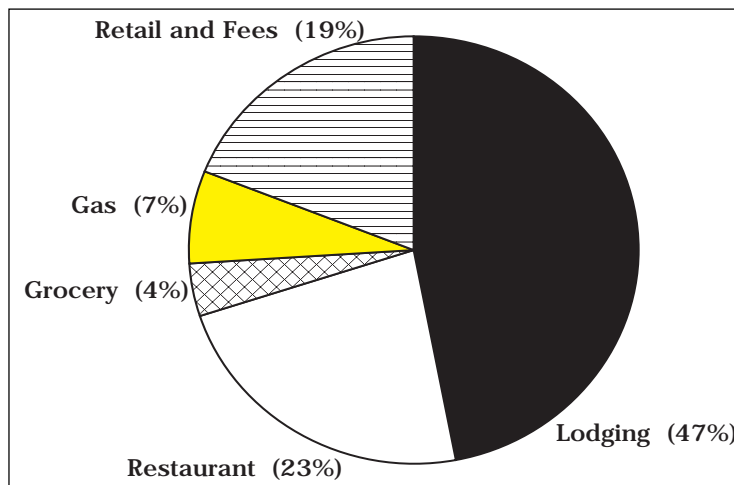
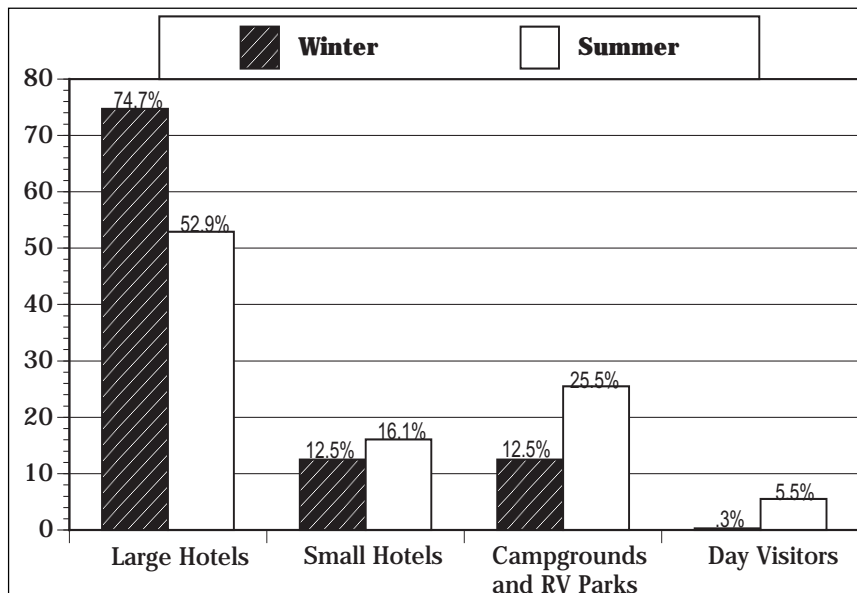


Figure 2. Expenditure Distribution by Where Visitors Stayed.



80 percent paid the admission fee to get into the Grand Canyon National Park. Only about two-thirds bought gas in Williams. About one-third to one-half bought groceries. One-fifth or less bought other retail items such as crafts, books, apparel, etc. (Table 4).

Since most transportation expenditures did not occur in Williams, they have been handled separately (Table 5). About 37 percent of all visitor parties bought airfare and about 58 percent rented a vehicle of some kind for this trip. Overall,

visitors spent almost \$159 million on airfare and \$99 million on rental vehicles.

IV. Economic Impacts

Visitors to Williams spend significant amounts of money in the community, but how does this translate into jobs and income for local residents? Using the 1993 IMPLAN input-output model for Coconino County, the effect of these ex-

penditures on the county economy was examined.

An input-output model is a simple model of all sectors of the economy and is used frequently for economic impact analysis. The impact results presented here consist of three basic components: the *direct effects* or how visitor expenditures translate directly into jobs and income, and the two components of the multiplier effect.

The first component is called *indirect effects* and consists of how a visitor's expenditure ripples through the local economy due to businesses serving visitors purchasing services from other local businesses (e.g., from laundry services, food wholesalers, accountants, banks, and other goods and service providers). These providers in turn make purchases from other local businesses. Hotels, restaurants and gift shops (and the businesses they buy from) also purchase goods and services from outside the local economy (in this case, the county). This represents leakage out of the local economy.

The second component of the multiplier effect is called the *induced or consumption effect*. It consists of the expenditures of local employees of hotels, restaurants, gift shops and gas stations and the businesses that they buy from. For example, employees may purchase food, clothing and other goods and services within the county.

Several measures of economic activity are reported here. Total income refers to the income received by employees (employee com-

Table 4. Percent of Visitors Making Purchases by Category.

	Winter	Summer	Total
Number of Observations	207	475	682
	----- (percent) -----		
Lodging	98	93	95
Miscellaneous Retail and Fees	92	84	86
Fees/Admission	87	82	84
Restaurant Food	90	80	83
Gas	62	69	67
Groceries	37	46	43
Other	21	23	22
Crafts	20	20	20
Books	19	13	15
Apparel	15	12	13
Art	7	8	8
Toiletries	4	9	7

Table 5. Transportation Expenses of Visitors.

	Winter	Summer	Total
Total Airfare (<i>in millions</i>)	\$ 45.486	\$113.382	\$158.868
Average Airfare/Party	\$436	\$505	\$484
Percent of Parties with Airfare	38%	31%	33%
Total Vehicle Rental (<i>in millions</i>)	\$ 30.814	\$ 68.085	\$98.899
Average Rental/Party	\$296	\$303	\$301
Percent of Parties with Rental	59%	48%	51%

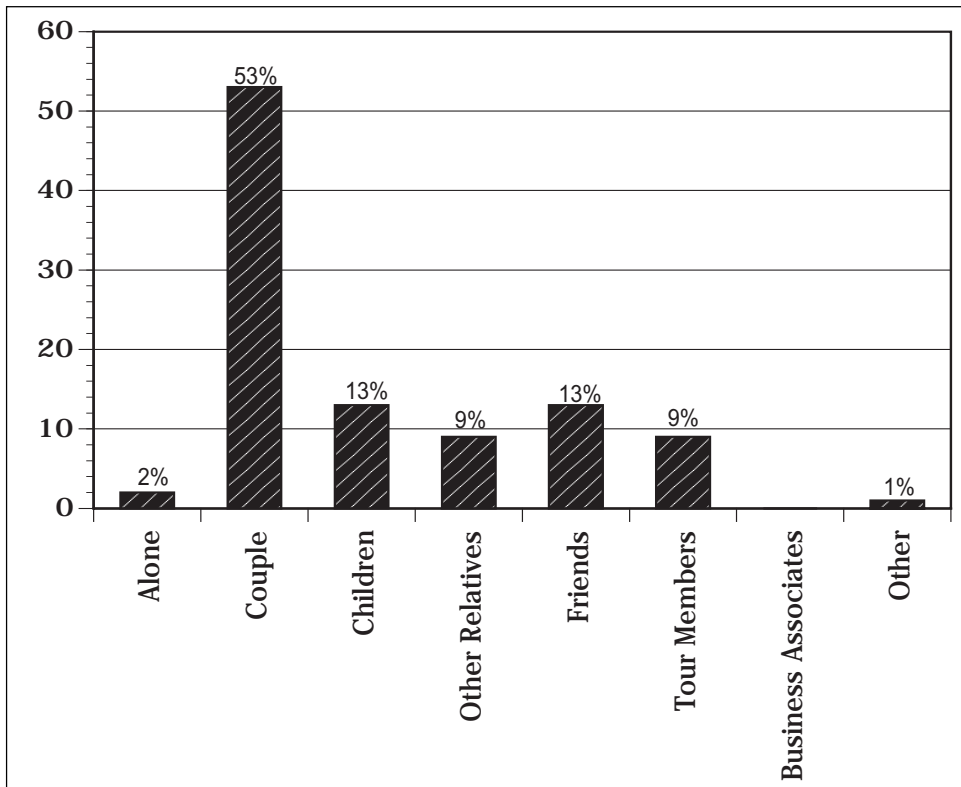
Table 6. Economic Impacts of Williams Tourism on Coconino County.

	Total Income	Value Added	Employee Compensation	Employment
	----- (in \$ millions) -----			----- (jobs) -----
Direct Effect	20.032	23.335	14.466	1,033
Indirect Effect	1.771	1.982	0.994	56
Induced Effect	7.936	9.13	4.684	250
Total	\$29.739	\$34.446	\$20.144	1,339

Table 7. Total Visitor Numbers.

	Winter	Summer	Total
Total Number of Party-Days	104,217	224,503	328,720
Total Number of Visitor-Days	321,987	671,321	993,308
Total Number of Visitors	189,404	279,717	469,121
Average Number of Visitor Per Party	3.1	3.0	3.0

Figure 3. Percent of Visitors by Traveling Companions.



pensation), and the owners of businesses and property (proprietor income and other property income). Value added measures the value a business adds to the inputs (other than labor and capital) that it buys. At the state level, value added is the amount that a specific economic activity contributes to Gross State Product. Value added is similar to total income. It includes employee compensation, proprietor income, property income and indirect business taxes. The final measure of economic activity presented here is number of jobs generated. This measure includes total jobs, both full-time and part-time.

The economic impacts of tourism in Williams for Coconino County are presented in Table 6. Virtually all of the direct impacts occur in Williams. However, some of the indirect and induced impacts may occur in Flagstaff or other communities in the county. The total income impacts of tourism and travel in Williams were \$30 mil-

lion of which \$20 million were direct effects. Value added impacts totaled \$34 million in value added of which \$23 million were direct effects. Employment impacts were 1,339 jobs, of which 1,033 were direct effects. One direct fiscal contribution visitors make to the community of Williams is through the 1.25 percent tax on hotels, restaurants and bars. Visitors contributed a large part of the estimated \$244,876 in city revenues collected through this tax.

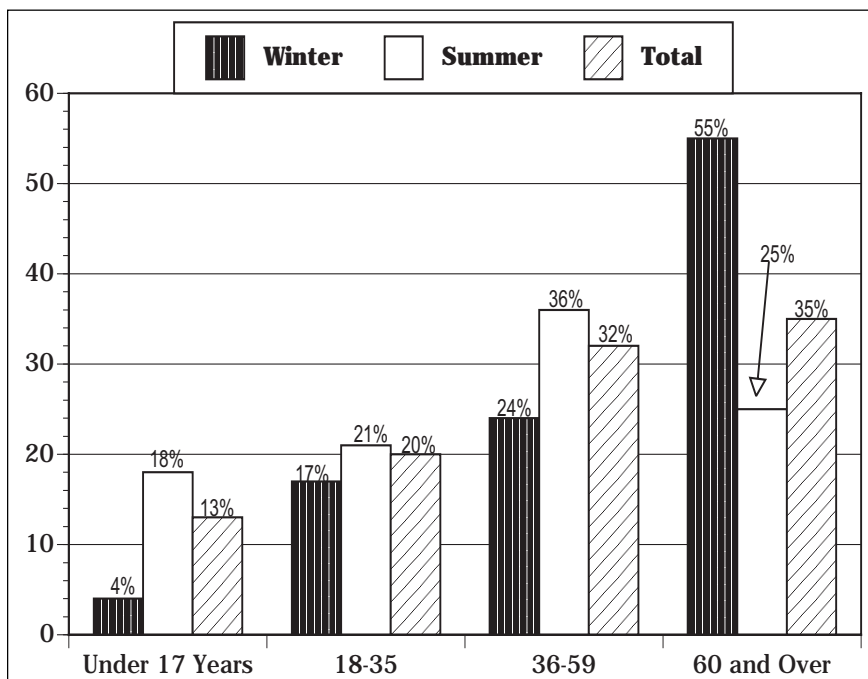
V. Visitor Characteristics

Visitor expenditures have a significant impact on the community of Williams. The tourism and travel industry itself is highly competitive and location dependent. Williams location vis-à-vis the Grand Canyon has been a tremendous advantage for it. However, with an increase in room numbers in Flag-

staff and Tusayan, businesses that cater to visitors in Williams will have to work harder to attract visitors to their community in the future. In order to reach prospective visitors, it is important to answer the following questions. Who are the current visitors to Williams? What do they do on their trip? What do they like and dislike about their stay in Williams? The next several chapters set out to answer these questions, starting with this chapter on visitor characteristics.

Information on visitor numbers is presented in Table 7. There are almost one and a half times as many visitors in Williams during the summer as the winter. The average size of the visitor parties is roughly the same in both seasons at three people per party. While children make up a larger percentage of summer visitors than winter visitors, tour members make up a larger percentage of winter visitors. Over half of all visitor parties consist of couples traveling either with or without others (Figure 3).

Figure 4. Ages of Visitors.



Many studies of tourism segment this market by age group. In the case of Williams, very different age compositions emerge for the summer and winter seasons (Figure 4). Well over half of the winter visitors are 60 years of age or older compared to one quarter of the summer visitors. Summer visitors include a much larger percentage of children. Eighteen percent of all summer visitors are under the age of 18 compared to four percent of winter visitors. Summer visitors also include a slightly larger percentage of visitors between the ages of 18 and 59. This piece of information alone indicates that local businesses should be prepared to cater to older clientele in the winter.

Figure 5. Origin of Visitors.

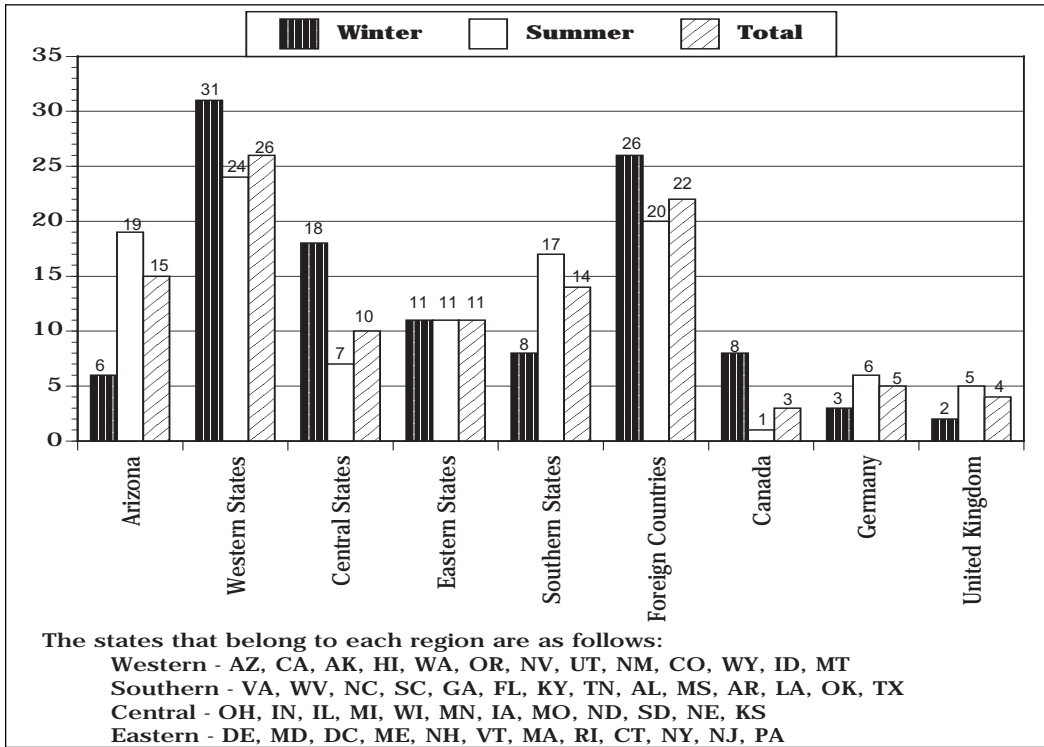


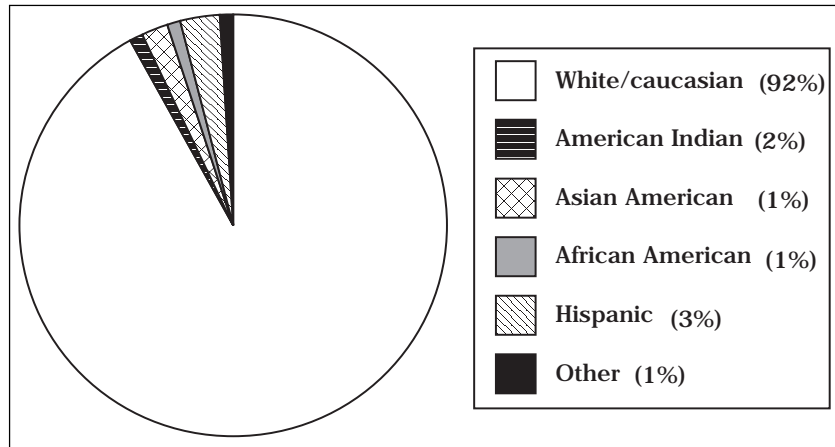
Table 8. Percent of Visitors from Key States or Regions.

State/Region	Winter	Summer	Total
Urban Arizona	4	11	9
Rural Arizona	3	8	9
Southern California	11	14	13
Northern California	9	4	6
Texas	2	4	3
New York	2	3	3
New Mexico	0	1	1
Nevada	1	1	1

Table 9. Citizenship of Visitors.

Total Percent of Visitor Parties with Citizens from:	
United States	72
Canada	4
Germany	6
United Kingdom	8
Other European	7
Asia and Middle East	1
Australia and New Zealand	2
Mexico and South America	1

Figure 6. Racial and Ethnic Background of Visitors.



The origin of winter and summer visitors is presented in Figure 5. Arizonans make up a larger percentage of summer visitors than winter visitors, particularly among visitors using campground facilities. The percentage of visitors from foreign countries is lower in summer, although the summer foreign visitor numbers are higher than in winter. Some regional variation seems to exist between the two seasons as well. Western and Central state visitors are more highly represented in the winter. Southern visitors are a larger percentage of summer visitors. Californians make up a larger percentage of Williams visitors than Arizonans (Table 8). Almost one-fifth of all visitors to Williams are from California (13 percent from Southern California). The next two

largest sources of U.S. visitors are Texas and New York, each with approximately three percent of all visitors. The citizenship status of visitors is presented in Table 9 and closely parallels results in Figure 5. European citizens, especially from the U.K. and German, were present in over one-fifth of all visitor parties.

Whites or Caucasians are the predominant racial group among visitors to Williams (Figure 6), representing approximately 92 percent of all visitors. The racial and ethnic composition of visitors varies little between seasons.

The educational levels of visitors are presented in Figure 7. Almost half of all winter and summer visitors have a

four year college degree or higher. Among Coconino County residents, only 25 percent have a bachelor's degree or higher. Household income levels are presented in Figure 8. Approximately half of all visitors have a household income of over \$60,000. Median household income in Coconino County in 1989 was \$26,112 (adjusted for inflation, this would be \$31,208 in 1994 dollars). Hence, visitors to Williams tend to be better educated and more affluent than average residents of Coconino County.

The occupations of visitors are presented in Table 10. In the winter season nearly half of all visitors are retired compared to 30 percent in the summer season. Students and administrators tend to be more prevalent in the summer.

In addition to asking visitors about their personal characteristics, we also asked them about their hobbies and interests. A complete list of hobbies and interests is presented in Appendix D. Table 11 contains the most commonly mentioned interests of visitors to Williams. These include: outdoor recreation, shopping, history, photography, music, books, gardening, antiques, ecotourism and conservation, arts and crafts, hunting, fishing, and golf, in that order. Winter visitors include a larger percentage of people interested in history, ecotourism conservation, gardening and books than do summer visitors. In contrast, there are a larger percentage of summer visitors interested in water sports and boating than in the winter months.

Knowing the major interests of visitors can be especially useful for retail shops hoping to

Figure 7. Educational Attainment of Visitors Over the Age of 21.

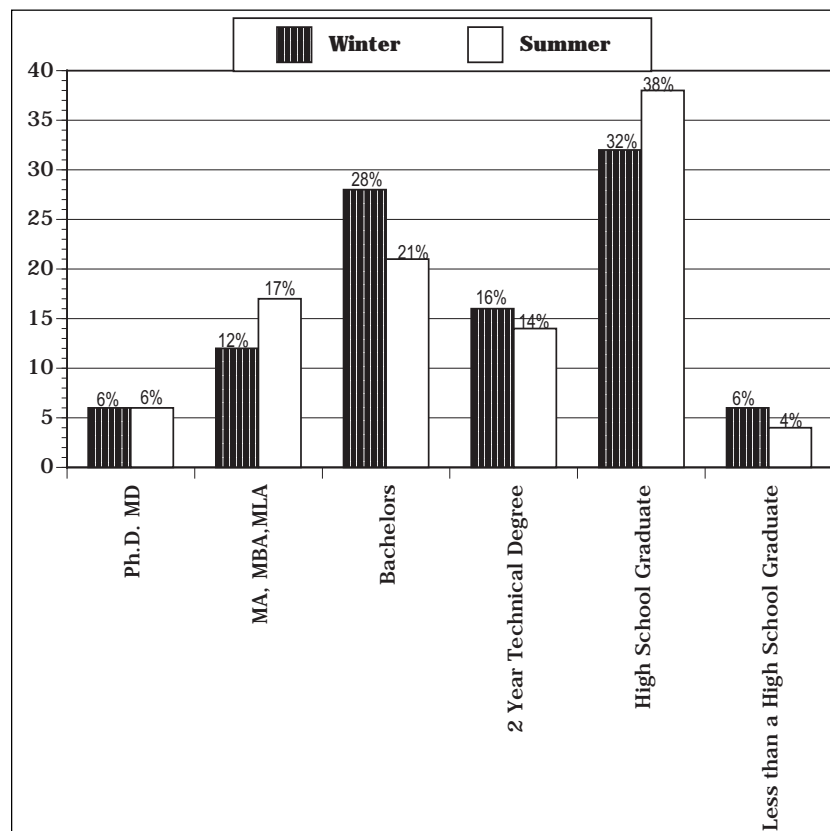


Figure 8. Household Income Levels of Visitor Parties.

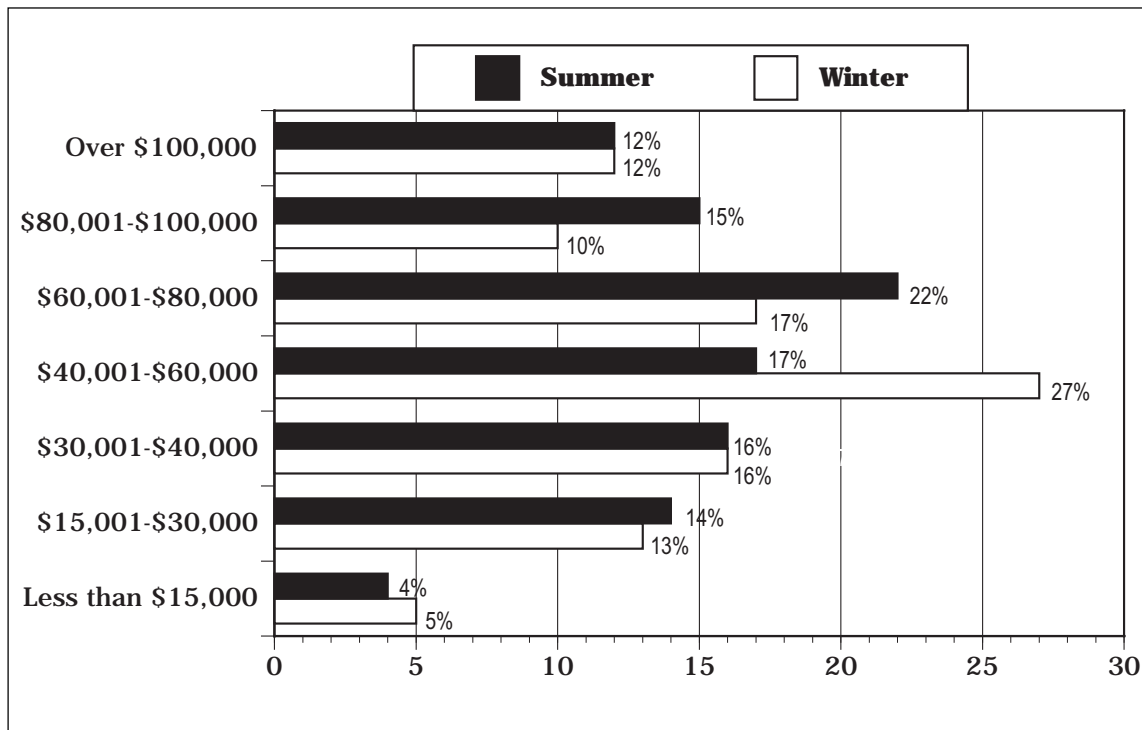


Table 10. Occupations of Visitors Over the Age of 21.

	Winter	Summer	Total
	---- (percent of visitors) ----		
Retired	48	30	36
Professionals	14	16	15
Students	7	14	12
Administrators/Managers	5	10	8
Homemakers	5	6	6
Clerical	4	5	5
Government Employees	4	4	4
Technical Sales	2	3	3
Services	2	2	2
Crafts and Repair	3	3	3
Farming/Fishing/Forestry	2	3	3
Laborer/Machine Operator	2	3	3
Other	2	2	2

Table 11. Most Frequently Mentioned Interests of Visitors.

	Winter	Summer	Total
	<i>(percent of visitors parties)</i>		
Outdoor Recreation	44	42	43
Shopping	40	41	41
Photography	39	41	40
History	43	34	37
Books	39	32	34
Music	29	32	31
Gardening	29	23	25
Art and Crafts	21	18	19
Conservation/Ecotourism	25	16	19
Golf	20	17	18
Antiques	19	17	18

sell to visitors. For example, a book store catering to some of visitors' major interests (particularly history, photography, outdoor recreation/conservation and gardening) could be quite viable. Opportunities are good for retail shops providing photography supplies, outdoor equipment and supplies, antiques, music, and books. However, as will become apparent in a later chapter, the retail sector will need to attract a larger percentage of visitors to their stores to prosper. In terms of public or non-profit developments, the market for historical attractions and entertainment involving outdoor recreation, photography or music looks particularly promising.

VI. Trip Characteristics

Visitors to Williams are engaged in a variety of different types of trip. During the summer, many are coming to enjoy the outdoors at local campgrounds. Foreign visitors are often on world tours or on tours across the United States. A

particularly popular combination of destinations is the Grand Canyon, Los Angeles and Las Vegas. Others are visiting national parks throughout the Southwestern U.S. or the West. Only about 10 percent are on a trip just to see the Grand Canyon. Almost half indicate that one or several places in Arizona are their main

destinations. About twenty-two percent indicate Las Vegas as one of their destinations on this trip (Table 12).

As mentioned earlier, a fifth to a quarter of all visitors are foreign travelers. The most common countries of origin for these travelers are Canada, Germany and the United Kingdom. One of the most common major purposes for coming to Williams for all visitors is to see the Grand Canyon. A large percentage of visitors are also interested in historical sites and museums, in the old Route 66 and in outdoor recreation (Table 13).

Some summary characteristics of visitors' trips are presented in Table 14. Summer visitors spend about 2.4 days in Williams compared to 1.7 days for winter visitors. However, winter visitors tend to be on longer overall trips (average of 26 days) compared to summer visitors average 14 days).

Table 12. Major Destinations on This Trip.

	Winter	Summer	Total
	<i>(percent of visitor parties)</i>		
Grand Canyon	11	9	10
Grand Canyon and One Other Arizona Site	17	21	20
Arizona	22	9	13
Southwestern U.S.	20	17	18
Western U.S.	2	16	12
United States	7	11	10
Nevada (esp. Las Vegas)	8	6	7
California Primarily	2	5	4
L.A.-Las Vegas-Grand Canyon	6	3	4
International	6	2	3
Destination includes the following:			
Las Vegas	23	22	22
Los Angeles	7	9	8
Phoenix	16	4	8

Table 13. Major Reasons for Trip to Williams Area.

	Winter	Summer	Total
	<i>(percent of visitor parties)</i>		
Grand Canyon	92	77	82
Historical Sites and Museums	26	18	21
Outdoor Recreation	12	21	18
Route 66	21	13	16
Friends and Family	19	8	11
Passing Through	2	15	11
Learn About Native Americans	15	6	9
See the Old West	2	10	7
To Ski	17	0	5
Business	7	2	4
Festival or Event	2	2	2

Table 14. Summary Statistics on Visitors' Trips.

	Winter	Summer	Total
Average Number of Hours in Williams	41	57	52
Average Number of Days in Williams	1.7	2.4	2.2
Average Number of Days on Total Trip	26.2	14.1	17.9
Average Number of Days on Total Trip for Guest at Large Hotels	11	11	11
	<i>----- (percent) -----</i>		
Primary Purpose to see Grand Canyon	85	65	71
Was unable to Stay in First Choice Area	7	21	17
Planned to Return to Williams	55	63	60
Rode the Train	34	23	26

Table 15. Local Sites Visited in the Williams Area.

	Winter	Summer	Total
	<i>(percent of visitor parties)</i>		
Grand Canyon	86	77	80
Railroad Station	41	31	34
Williams Historic District	31	23	26
Sedona	35	21	25
Flagstaff	26	23	24
National Forests	16	16	16
IMAX Theatre	14	16	15
Lakes	5	14	11
Flintstones Bedrock City	5	9	8
The Grand Canyon Caverns	8	5	6
Elephant Rocks Golf Course	2	4	3
The Grand Canyon Deer Farm	2	3	3
Museum of Northern Arizona	2	2	2
Williams Ski Area	3	1	2

Very few winter visitors indicated that they are unable to find accommodations in their first choice of site/community in this area, however a fifth of the summer visitors indicated that they are unable to stay in their first choice. A larger percent of winter visitors (64 percent) chose Williams as their first choice of a place to stay than summer visitors (48 percent).

In addition to visiting the Grand Canyon, a large percentage of visitors visit the railroad station in Williams, historic downtown Williams, Sedona and Flagstaff. Winter visitors tend to visit more community based attractions such as historic Williams, Flagstaff and Sedona, while a larger percentage of summer visitors visit the lakes and attractions on the way to the Canyon, such as the IMAX and Flintstones Bedrock City (Table 15). Overall, only a quarter of all visitors spend time in historic downtown Williams. However, this still

represents well over 110,000 people who visit downtown.

While in Williams, visitors enjoy sightseeing, shopping, picture taking, visiting historical places and museums, camping, hiking, stargazing, wildlife watching and picnicking, in that order (Table 16). Three quarters of all visitors engage in sightseeing. Almost 45 percent take pictures. Over a quarter visit historic places and museums. Twenty-three percent of all

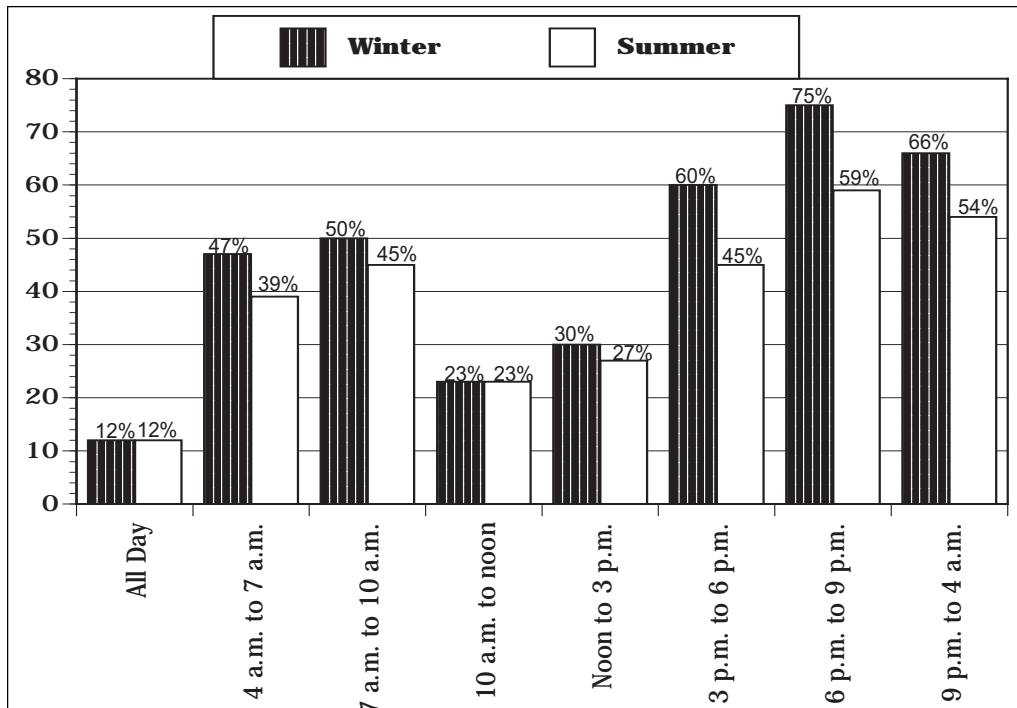
Table 16. Leisure Activities of Visitors.

	Winter	Summer	Total
	<i>(percent of visitor parties)</i>		
Sightseeing	76	76	76
Photography	42	45	44
Shopping	41	34	36
Visits to Historic Places and Museums	37	27	30
Hiking and Walking	17	18	18
Camping	9	20	17
Stargazing	11	11	11
Wildlife Watching	11	9	10
Picnicking	4	8	7
Fishing	0	9	6
Swimming	1	7	5
Plane/Helicopter Ride	2	6	5
Golf	1	3	2
Attend Festival	0	2	1
Boating	0	2	1
Skiing	1	1	1
Bicycling	1	1	1
Other	18	16	17

visitors to Williams ride the train to the Grand Canyon in the summer and 34 percent ride it in the winter. The train is a very significant attraction for the community of Williams.

Because Williams visitors are spending a lot of time seeing sites, they generally spend little time in the community of Williams itself. They are most likely to be in town early and mid-morning (from 4 a.m. to 10 a.m.) and again late afternoon through the night (from 3 p.m. on). Figure 9 illustrates this trend. This is critical

Figure 9. When Visitors are in Town.



information for those businesses that serve visitors. This pattern varies little between the summer and winter season. However, a lower percentage of summer visitors are in town during the late afternoon and evening. This is probably because of the larger number of campers and the longer day light hours during the summer.

Several visitors suggest that shops and restaurants stay open later or open earlier in the morning. Shops might consider opening early but shutting during the hours of 10 a.m. and 3 p.m. and then remaining open from 3 p.m. until 9 or 10 p.m. (at least during peak season) as a way of serving the most visitors.

VII. What Visitors Know and Think About Williams

Most of the surveys received are very positive in their view of Williams and contain many compliments particularly concerning the friendly, helpful people that they met at their place of lodging and at the visitor center. Visitors especially like the friendly people of the community, the scenery and natural beauty of the area, the small town feel, and the convenient location of the community relative to major attractions

Figure 10. Number of Times Visitors have been to Williams.

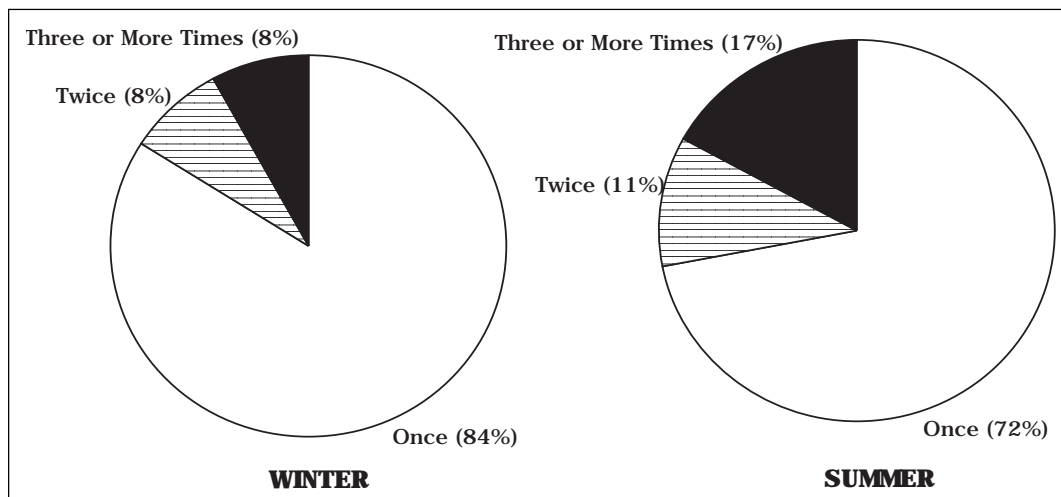


Table 17. What Visitors Like Most About Williams.

Number of Responses	453
Percent of Total Surveys	66%
	Percent of Response
Friendly People	31
Small Town Atmosphere	22
Scenery/Beauty	17
Location	14
Accommodations	9
Quiet/Peaceful	8
Climate	7
History of the Area	6
Clean	4
Train	4
Food	3
Easy Access	3
Golf Course	2
Shops	2
Less Traffic	1

Although 84 percent of winter visitors and 72 percent of summer visitors were in Williams for the first time (Figure 10), a large percentage indicated that they planned to return to Williams (55 percent of winter visitors and 63 percent of summer visitors). This interest in returning to the community was fairly consistent across visitors to RV parks and campgrounds, small hotels and large hotels, but lower for day trip visitors.

(Table 17). Roughly two-thirds of all visitors wrote down positive comments concerning what they like about Williams.

Few people had comments to make concerning what they like least about Williams (35 percent of winter visitors and 28 percent of summer visitors). The number one concern is high prices, especially for gas and for accommodations. However, only 13 percent of the 72 winter visitors and 16 percent of the 133 summer visitors who responded indicate this concern. The other most frequent comments are as follows. It is colder in Williams than they expected. The shops and restaurants are either not open early enough in the morning or closed too early at night. Williams is too small and did not offer all the amenities that they want. The

noise of the trains going through the town bother them at night. The road conditions out to some of the campgrounds were bad (Table 18).

Visitors who took the train ride are very enthusiastic about the experience of riding the train and about the scenery (Table 19). They have fewer comments concerning what they did not like about the train, although about a third indicate

that they wish that more food had been available on the train during the ride (Table 20).

Visitors tend to be very positive about the shops, restaurants and hotels in town as can be seen in Tables 21 through 23. Of the 191 people with suggestions for restaurants, 41 percent indicate that the food they ate was good or excellent. The two most frequent concerns are that visitors

want more variety or choice of restaurants and some indicate a need to improve the quality of food served.

Only 103 people have suggestions for the shops. Almost 30 percent of these indicate that they found the shops very interesting and good for shopping. The major concerns are as follows. They cannot find an item they want (mostly items of apparel such as bathing suits, shirts, children's clothes). The shops need to open earlier, stay open later and to be open during

Table 18. What Visitors Liked Least About Williams.

Number of Responses	205
Percent of Total Surveys	30%
Percent of Response	
High Prices	15
Cold Weather	12
Too Small	8
Shop/Restaurant Hours	8
Road Conditions	7
Noisy	6
Problems at Campgrounds	5
Not Friendly	5
Dirty/Rundown	4
Food	4
Location	4
Rowdy Kids	2
Street Signs	2
Traffic	2
No Night Life	2
Too Quiet	2
Too Tourist Oriented	2
Altitude	1
Smoking in Restaurants	1

Table 19. What Visitors Liked Best About the Train Ride.

Number of Observations	159
Percent of Response	
Experience of Train Ride	74
Scenery	69
Activities on Train	63
Other	25

Table 20. What Visitors Liked Least About the Train Ride.

Number of Observations	159
Percent of Response	
Availability of Food	33
Other	31
Lack of Activities	11
Cleanliness of Train	7

Table 21. Comments Made Concerning Restaurants.

Number of Responses	191
Percent of Total Surveys	28%
Percent of Response	
Food was Good/Great/Excellent	41
Need more Choice of Restaurants/Food	13
Improve Quality of Food	10
Improve Service	9
Service was Good	8
Stay Open Later	5
Lower Prices	4
Don't Allow Smoking in Restaurant	4
Open Additional Fast Food Restaurants	3
Offer Better Quality for Price	3

Table 22. Comments Made Concerning Shops.

Number Responding	103
Percent of Total Surveys	16%
Percent of Response	
Shops are Interesting/Good	29
Open Earlier, Stay Open Later	17
Could Not Find an Item	13
Need more Variety of Stores	10
Lower Prices	8
Clean Up Store Front and Interior	5
Improve Quality of Merchandise	5
Improve Service	4
Need Bigger/Better Grocery Store	2

the hours posted on their door. Visitors also want a wider variety of shops (not so many shops offering the same things).

Visitors rate their accommodations quite highly. They give the highest positive ratings for service and cleanliness; 67 percent of the visitors rate these as excellent or very good. They give the lowest rat-

ings to decor/furnishings and to heating and cooling, but these still receive 45 or 46 percent excellent or very good ratings and only six percent fair or poor ratings.

The single most common way for visitors to learn about Williams as a place to stay and visit is through guide books (Table 24). Among guide books, the AAA books are particularly popular (eight percent mentioned AAA in write-in comments). The next most common way is through friends and family (word of mouth), followed by brochures and road signs. Targeting the writers of guide books may be one way to make sure that people learn of Williams. Treating current visitors well is likely to bring their friends and family to Williams.

Visitors make use of a variety of information sources on their trip (Table 25). The most popular of these include maps, brochures and newsletters, books or guides and the staff at the visitor center. Nearly half of all winter visitors and 35 percent of summer visitors

indicate that the Visitor Center is a major source of information for them. When asked how they pre-

Table 23. How Visitors Rated Accommodations.

	Excellent	Very Good	Good	Fair	Poor	No Answer
	<i>(percent of total surveys)</i>					
Service	38	29	14	2	2	16
Cleanliness	37	30	16	3	1	14
Value	29	27	19	6	2	16
Noise Level	27	27	17	8	3	18
Choice	23	31	20	6	1	18
Decor	20	26	21	5	1	26
Heating/Cooling	21	24	19	5	1	29

Table 24. How Visitors Learned of Williams.

	Percent of Visitor Parties
Guide Book	34
Friends and Family	22
Brochure	13
Road Signs	13
Travel Agent	5
Not Sure/Don't Remember	5
Magazine Article	4
Newspaper Article	3
Newspaper Advertisement	1
Other	21
Map	7
AAA	8

Table 25. Travel Information Sources Used by Visitors to Williams.

	Percent of Visitor Parties
Maps	64
Brochures and Newsletter	62
Books and Guides	37
Visitor Center Staff	35
Displays at Visitor Center	22
Other	5
Tours or Interpretive Programs	5
Computer	1
Videotapes	1

ferred to receive trip related information, the most popular mediums were written materials and knowledgeable staff to talk to (Table 26).

VIII. Market Segments: Visitor Profiles for Williams

In the travel and tourism business, knowing your customer and using this knowledge to better serve your customer is key to success. Although most visitors to Williams come to the area to see the Grand Canyon, they participate in a wide variety of activities, their motivation or reasons for traveling vary widely and they have different interests and personal characteristics. Hence, it is helpful to think about the different types of visitors who come to the region. Understanding different visitor types or different segments of the travel

market can help you better identify your primary customer, their interests and characteristics and thus, improve both your ability to market to them and to serve their needs.

If you run a campground, RV park or cater to outdoor recreation visitors, you may want to study the characteristics of these visitors in detail. On the other hand, if you manage a historic site or museum, using the information about historic visitors may be helpful. These are just a few examples of how you can use information about specific visitor types to make strategic marketing and merchandising decisions.

For this report, several key groups of visitors were identified:

international travelers, visitor parties with children, older visitors, outdoor recreation travelers, and historical travelers. For each of these types of visitor, a profile is presented in Table 27. International travelers were identified according to their home address. Parties with children included all parties that listed members under the age of 18. The over 60 travelers included all visitor parties where the majority of members were over 60 years of age (parties where there were an equal number of over 60

Table 26. How Visitors Prefer to Receive Travel Information.

Percent of Visitor Parties	
Written Material	62
Knowledgeable Staff to Talk to	46
Activities I can do Myself	19
Self Explained Exhibits	19
Video or Computer Materials	7
Talk, Lecture or Slide Show	7
Audio Programs	3
Other	2

Table 27. Five Visitor Profiles.

	Parties with				
	International	Children	Over 60	Outdoors	Historic
Number Observations	156	139	200	141	117
Percent of all Visitor Parties	23%	20%	29%	21%	17%
Average Expenditure/Person (\$)	73	72	102	84	99
Average Expenditure/Person-Day (\$)	42	20	30	14	48
Average Trip Length (days)	41.1	10.7	23.4	22.9	33.1
Average Stay in Williams (days)	1.7	3.6	3.5	6.1	2.0
Party Size (number of people)	2.7	4.25	2.4	2.9	2.6
	----- (percent) -----				
Retired	15	10	83	30	36
Over 60 Years of Age	16	5	92	27	34
Under 18 Years of Age	11	44	1	13	9
Over \$60,000 Household Income	46	55	21	43	41
Under \$30,000 Household Income	17	14	28	33	17
College Graduate	53	35	41	40	35
Saw the Grand Canyon	97	76	70	62	88
Rode the Train	15	23	33	14	32
Stayed at Hotel	58	58	45	20	57
Stayed at Campground/RV Park	40	36	48	76	34

and all other age members were not included in this group). Outdoor recreation travelers were identified by the reason that they gave for visiting the area. Those who listed outdoor recreation as one of their top three reasons for visiting Williams were included. Historical visitors include all visitors who mentioned visiting museums and historic sites as one of the top three reasons for their trip. The groups are not mutually exclusive, in other words, the same visitor might classify both as an over 60 and a historic visitor.

The biggest spenders are historic and international travelers. They spend an average of \$48 and \$42 per person per day,

respectively, while in Williams. In contrast, outdoor recreation travelers spend \$14 per person per day. However, outdoor recreation travelers spend the longest amount of time in the area (about six days), while international and historic visitors stay two days or less.

Parties traveling with children have the largest sized visitor party (with an average of 4.25 persons per party). The over 60 travelers and historic visitors have the largest percentages of retirees and people over the age of 60, while parties with children have the fewest. Parties with children tend to be the most affluent of visitors, with 55 percent having household in-

come of more than \$60,000 a year and only 14 percent with household income of less than \$30,000 per year. International travelers are the next highest income group.

International travelers tend to be the best educated group. Fifty-three percent have a four year college degree or more. Virtually all international visitors and 88 percent of historic visitors go to see the Grand Canyon. Only 62 percent of outdoor recreation travelers go to the Canyon. The visitors most likely to ride the train to the Grand Canyon are the over 60 and the historic travelers. Outdoor recreation travelers and over 60 travelers were more

Table 28. Visitor Interests by Visitor Type.

	Parties with				
	International	Children	Over 60	Outdoors	Historic
	----- (percent) -----				
Outdoor Recreation	39	51	40	78	40
Photography	43	40	33	41	49
Shopping	32	50	40	29	49
History	33	36	42	22	48
Books	35	29	35	38	42
Music	35	36	21	35	34
Gardening	19	20	29	25	27
Conservation/Ecotourism	23	15	20	30	23
Crafts/Art	10	19	20	24	27
Fishing/Hunting	6	18	22	36	10
Antiques	11	17	17	11	25
Gambling	9	12	15	16	16
Computers	9	19	13	10	15
Golf	10	13	16	10	15
Religion	5	15	13	14	15
Stargazing	5	17	7	20	12
Rocks and Geology	6	21	12	11	11
Water Sports	11	20	4	17	8
Video Games	5	29	3	4	8
Skiing	14	12	2	9	10
Boating	3	13	8	16	6
Movies	12	13	3	6	12
Art	6	8	8	5	10
Team Sports	9	12	4	5	5
Horseback Riding	6	9	3	10	4
Flying	6	1	6	8	7
Vegetarianism	7	6	2	6	5
Other	10	12	9	10	10

likely to stay in campgrounds or RV parks and less likely to stay at a hotel than other visitors.

Visitor interests vary widely by visitor type (Table 28). For example, 49 percent of historic visitors are interested in photography but only 33 percent of over 60 visitors. If you sell books, you might be interested in knowing that historic and outdoor recreation visitors are the most likely to be interested in books, while parties with children are the least likely to be interested. All of the visitor types are interested in music, but older visitors tend to be slightly less interested. If you rent or sell video games or computer software, your market is the parties with children.

International visitors are most likely to visit the Grand Canyon, the railroad station, Flagstaff and Sedona on their trip (Table 29). Three-fourths of parties with children

visit the railroad station. The over 60 visitor and historic visitors are more likely to visit historic downtown Williams, while outdoors travelers were most likely to visit the National Forests and lakes. Sedona is most appealing to historic visitors and the over 60 visitor. Flagstaff appeals the most to historic, outdoors and over 60 visitors.

While most visitors mention sightseeing, the over 60 and outdoors visitors are least likely to sightsee (Table 30). The over 60 visitors are also less likely to be taking photographs on their trip. Outdoors visitors mention shopping the least but camping, hiking, wildlife watching, fishing and stargazing the most. Historic visitors most frequently mention visiting historic areas and museums, and shopping. International visitors take plane or helicopter rides over the Canyon in larger numbers than other visitor types.

a. The International Traveler

International visitors tend to have high levels of income and education and make relatively high expenditures per person per day in the Williams area. They are generally on extensive international or U.S. trips lasting over one month. However, they tend to only spend a day or two in Williams. They are primarily interested in seeing the Grand Canyon, but about a quarter of them visit the Grand Canyon Railway Station, Flagstaff and Sedona. These visitors enjoy photography, outdoor recreation, books, music, history and shopping.

b. Parties with Children

Parties with children have relatively high incomes but lower educational levels than international visitors. They tend to be on shorter trips averaging about 10 days and spend almost four days on

Table 29. Sites Visited by Visitor Type.

	International	Parties with Children	Over 60	Outdoors	Historic
	----- (percent) -----				
The Grand Canyon	97	76	70	62	88
The Grand Canyon Railway Station	30	26	40	22	54
Flagstaff	24	17	30	30	37
Sedona	23	18	28	21	36
Williams Historic District	14	19	32	16	34
National Forests/Wilderness	15	14	14	36	23
Lakes	11	14	15	41	9
IMAX Theatre	14	17	15	14	22
Grand Canyon Caverns	10	5	6	8	9
Flintstones Bedrock City	7	9	3	9	9
Grand Canyon Deer Farm	1	5	3	4	3
Museum of Northern Arizona	4	1	3	3	5
Elephant Rocks Golf Course	3	1	2	1	1
Williams Ski Area	1	1	3	1	0
Other	10	6	5	11	9

Table 30. Visitor Activities by Visitor Type.

	International	Parties with Children	Over 60	Outdoors	Historic
	----- (percent) -----				
Sightseeing	79	72	68	62	90
Picture Taking	50	49	37	48	57
Visit Historical Sites and Museums	32	29	30	24	74
Shopping	37	35	35	30	50
Camping	19	29	25	67	22
Hiking	31	24	10	47	24
Wildlife/Bird Watching	13	11	13	33	14
Fishing	2	14	12	33	14
Stargazing	9	12	8	27	14
Picnicking	4	8	9	15	7
Plane or Helicopter Ride	16	6	2	6	6
Swimming	6	9	1	6	3
Boating	3	4	3	6	2
Attend Festival or Event	0	1	2	2	3
Bicycling	1	3	0	4	0
Hunting	0	1	1	2	2
Horseback Riding	1	1	1	1	2
Skiing	1	0	1	1	0
Golfing	1	0	1	0	0
Other	6	11	19	11	13

average in Williams. They have a larger party size than other visitors but make relatively low expenditures per person per day while in Williams. Almost a quarter do not visit the Grand Canyon, while nearly one quarter ride the train. They tend to visit local sites less than the other types of visitors. They engage in sightseeing, photography, shopping, visiting historical sites and museums, camping and hiking most frequently. Their special interests include outdoor recreation, shopping, photography, history, music, books and video games.

c. The Older Traveler

Older travelers tend to have more modest incomes but fairly high levels of educa-

tion. Over four-fifths of them are retired and they tend not to travel with children. They spend a moderate amount of money while in Williams. They are generally on 24 day trips. They spend about 3.5 days in Williams and have an average party size of 2.4 people. One-third of them rode the train although only 70 percent saw the Grand Canyon. They are as likely to stay in an RV park or campground as in a hotel. Between 28 and 40 percent of these visitors spend time at the railway station, in historic downtown Williams, in Flagstaff and in Sedona. While in the Williams area they like to sightsee, take photographs, shop, visit historical sites and museums, and camp. Their strongest interests are his-

tory, outdoor recreation, shopping, books, and photography.

d. The Outdoor Recreational Traveler

Outdoor recreation travelers spend the longest amount of time in Williams (six days), but spend the least amount of money per person per day (\$15). Their average trip length is about 23 days and their average party size is just under three people. Outdoor recreation travelers consist of large groups of both relatively high income people (43 percent have incomes of over \$60,000) and relatively low income people (33 percent have incomes of less than \$30,000). They are the least likely to see the Grand Canyon or ride

the train. They are the most likely to go to the National Forest and lakes. They also like visiting Flagstaff. While in the Williams area they enjoy sightseeing, camping, photography, hiking, wildlife watching, fishing, shopping and star gazing. Their strongest interests are in outdoor recreation, photography, books, fishing and hunting, music, and conservation.

e. Historical Traveler

Historic visitors are the big spenders in Williams. However, they stay an average of only two days in the area. They have relatively small visitor parties (2.6 persons). They tend to be on month long trips. About one-third of them are retired and over 60 years of age. They have fairly high incomes, but lower educational levels than most other visitors. Most of them do visit the Grand Canyon and a third of them ride the train. More than half of them visit the train station and over one-third visit Flagstaff, Sedona, and historic downtown Williams. They spend their time sightseeing, visiting historical sites and museums, taking photographs and shopping. Their strongest interests are in photography, shopping, history, books, outdoor recreation, and music.

IX. Summary and Conclusions

Visitors to the Williams area spent approximately \$37 million dollars in the area between July 1, 1995 and July 1, 1996. Almost half of this expenditure was for lodging and nearly one quarter was for prepared

meals and beverages. About three quarters of this expenditure was made by visitors staying at larger hotels (more than 30 rooms) even though these visitors represented only 53 percent of total visitors.

The \$37 million in expenditures generated \$30 million in total income impacts and 1,339 jobs. Twenty million dollars in income and 1,033 jobs were the direct effect of the expenditures.

About half of all visitor parties include a couple. The average size of the visitor parties is three people and the average length stay in Williams is 2.2 days. Overall trip length averages 18 days. Foreign visitors represent 22 percent of all visitor parties. Californians are 19 percent of all parties and Arizonans represent 15 percent of all parties. Over one-third of all visitors are retired and one-third are over the age of 60. Children represent 13 percent of all visitors. The strongest interests of Williams visitors are in outdoor recreation, shopping, photography, history, books and music. Most visitors are white or Caucasian. Forty-four percent have completed a four year or higher college degree. Fifty-five percent of all visitors have household incomes of over \$60,000 per year.

Arizona is the major destination for 43 percent of all visitors to Williams. Twenty-two percent of all visitor parties indicate that they also visited Las Vegas. Visiting the Grand Canyon is the most common reason for visiting Williams. The next most common reasons are: visiting historical sites and museums, and outdoor recreation. The most popular sites to visit after the Grand Canyon are the railroad station, historic down-

town Williams, Sedona and Flagstaff. The most popular leisure time activities are sightseeing, photography, shopping, and visiting historical sites and museums.

Because visitors did spend much of their time exploring the area or at the Grand Canyon, very few visitors tend to be in Williams between the hours of 10 a.m. and 3 p.m. The peak hours are actually between 6 p.m. and 9 p.m.

Very few of the visitors to Williams have been there before. However, they enjoy the friendliness of local people, the small town atmosphere, the scenery, and the location relative to the Grand Canyon. A few visitors indicate that prices are too high and that it is colder in Williams than they expected. Visitors rate local restaurants, shops and hotels very highly. The major concerns with restaurants are the need for more variety; both on the menus of existing restaurants and in the number of restaurants, and with the quality of the food in some restaurants. Most visitors who did shop in Williams, like the shops, however, some visitors suggest that shops open earlier, stay open later and be open during their posted hours. Visitors have difficulty finding some items that they want to buy and would like to see more variety or selection in the shops. Visitors are particularly impressed with the service and cleanliness of their lodging places, but slightly less impressed with the decor, furnishings, heating and cooling.

The most common way for a visitor to learn about Williams is through a guide book; AAA is commonly mentioned. The next most common way is through the recommendations

of friends and family members. Two other important sources of information are brochures and road signs. While on their trips, visitors rely heavily on maps, brochures and newsletters. They indicate that they prefer to receive travel information through written materials or through talking to knowledgeable local people.

Five of the most common types of visitors to the Williams area are international travelers, visitors with children,

older visitors, outdoor recreation visitors and historic visitors. More detailed descriptions of these visitors is provided in the previous chapter. Some of the most interesting aspects of the profiles are as follows. Historic visitors emerge as the biggest spenders (followed by international travelers). Outdoor recreation visitors spend the most time in the area. Visitors with children tend to have the highest incomes. International visitors are the most focused on visiting the Grand Canyon. Older

visitors tend to have lower incomes and are more likely to visit during the winter season.

This study provides a benchmark for estimating visitor expenditures and economic impacts in Williams. It also provides a great deal of detailed information on specific visitors. By paying attention to what visitors do on their trip and what their interests are, local businesses can develop more targeted marketing strategies and improve their merchandising and service.

Appendix A. Williams Visitor Survey

Thank you for agreeing to complete this survey. We have designed the survey to take approximately 10 minutes of your time to complete. The responses that you provide will help businesses and citizens in Williams improve the services and goods that they offer to visitors. Please either leave this survey form at the front desk when you complete it or mail it to us in the postage paid, addressed envelope included with the survey.

Place Number _____ Date _____ Time: _____

- In what city, state and/or country is your home? _____ zip code? _____
- As you left home on this trip, what communities or areas were to be your main destinations? _____
- What is the main purpose of this trip to the Williams area? (rank your top three, using 1 to indicate the most important)
 - _____ To see the Grand Canyon
 - _____ To visit historical sites or museums
 - _____ Outdoor recreation- hiking, camping, etc.
 - _____ To experience Route 66
 - _____ To learn about Native American Indians
 - _____ Just passing through
 - _____ To visit friends and family
 - _____ Business or work related
 - _____ To experience the Old West
 - _____ To ski or play golf
 - _____ To attend a festival or event
 - _____ Other, please specify: _____
- What were the main leisure activities that you engaged in during your stay in the Williams area? (check all that apply)
 - general sightseeing
 - shopping
 - hiking
 - boating
 - wildlife/bird watching
 - horseback riding
 - fishing
 - camping
 - attending festivals/events
 - star gazing
 - visiting historical sites/museums
 - plane/helicopter ride over Grand Canyon
 - skiing
 - swimming
 - golfing
 - bicycling
 - hunting
 - picnicking
 - picture taking
 - other, please specify: _____

- How much time did you spend in the Williams area on this trip? _____ hours OR _____ days
- How many nights did you spend in the Williams area on this trip? _____ nights
- How many total nights have you spent away from home during this trip? _____ nights
- During which times of the day were you physically in the City of Williams? (check all that apply)
 - all day
 - early morning (4 a.m. to 7 a.m.)
 - morning (7 a.m. to 10 a.m.)
 - ate morning (10 a.m. to noon)
 - early afternoon (noon to 3 p.m.)
 - late afternoon (3 p.m. to 6 p.m.)
 - early evening (6 p.m. to 9 p.m.)
 - night time (9 p.m. to 4 a.m.)

- If you stayed overnight in this area, which of the following places were your first and second choice for spending the night (write 1 for first choice and 2 for second choice):
 - _____ Grand Canyon
 - _____ Tusayan
 - _____ Williams
 - _____ Flagstaff
 - _____ Valle
 - _____ Other, please specify: _____

- Were you able to spend the night in the area of your choice? yes no

Survey No. _____

- What local sites have you visited during your stay? (check all that apply)

- The Grand Canyon
- Sedona/Oak Creek Canyon
- The Grand Canyon Railway Station
- The Grand Canyon Deer Farm
- Elephant Rocks Golf Course
- National Forest/Wilderness area
- Lakes
- Flinstones Bedrock City
- Flagstaff
- Museum of Northern Arizona
- Williams Historic District
- The Williams Ski Area
- Grand Canyon Caverns
- IMAX theater
- Other, please specify: _____

- Please indicate the number of members of your traveling party who can be described under each category:

_____ total number of people in your party _____ friends (but not relatives)
 _____ spouse or significant other _____ other tour group members
 _____ own children _____ business associates
 _____ other relatives _____ other, please specify: _____

- How many people in your party are: _____ 17 years of age or younger _____ 36 to 59 years of age
 _____ 18 to 35 years of age _____ 60 years of age or older

- What are the occupations of members of your party? (please write the number of party members on each line)

_____ retired _____ student
 _____ manager, administrator _____ professional (lawyer, teacher, Dr., RN, engineer)
 _____ technical sales _____ administrative support or clerical
 _____ service (hairdresser, waiter) _____ farming, forestry, fishing
 _____ craftsman, repair person _____ machine operator, laborer
 _____ government service/armed forces _____ homemaker
 _____ other, please specify: _____

- What is the level of education of members of your party over 21 years old? (please write the number of party members)

_____ less than a high school graduate _____ bachelor's degree
 _____ high school graduate _____ master's, MBA, M.A., degree
 _____ associate degree _____ Ph.D., M.D., or similar degree

- Please estimate your expenditures in U.S. dollars in Williams.

- These expenditures are for (_____ number of) people.
- lodging/accommodations \$ _____
 - restaurant food \$ _____
 - groceries \$ _____
 - gas \$ _____
 - other purchases \$ _____

- What types of other purchases did you make? (check all that apply)

- entrance fees, licenses, donations
- books
- other, please specify: _____
- crafts
- apparel
- toiletries, etc.

- Please estimate the following expenses you have had on this trip.

These expenditures are for _____ (number of) people.

- airfare \$ _____
- car, van, RV or other vehicle rental \$ _____

Survey No. _____

18. Was there anything that you wanted to buy or do in the Williams area that was not available or that you could not find or do? no yes. If yes, describe: _____

19. How many total number of trips (including this one) have you made to Williams in the past five years? _____ trips.

20. Do you plan to return to the Williams area? no yes. Please explain why you do or do not plan to return to the Williams area: _____

21. Local businesses would like to have your suggestions as to what they or the community can do to better serve your needs. Please rate your experience in local hotels/campgrounds (circle the appropriate choice):

	excellent	very good	good	fair	poor
Choice/variety of facilities	5	4	3	2	1
Cleanliness	5	4	3	2	1
Service	5	4	3	2	1
Value (quality for amount paid)	5	4	3	2	1
Decor/furnishings	5	4	3	2	1
Heating/cooling	5	4	3	2	1
Noise level	5	4	3	2	1

22. If you did not receive this survey at your place of lodging, can you please tell us where you stayed? _____

23. Do you have any suggestions for or comments on local restaurants?

24. Are these suggestions for any specific restaurants? no yes. If yes, which ones: _____

25. Do you have any suggestions for or comments on local shops?

26. Are these suggestions for any specific shops? no yes. If yes, which shops: _____

27. Did you take the train ride to the Grand Canyon? no yes. If yes, what did you like about the ride? _____

- the scenery
- the activities on the train
- the experience of riding the train
- other, please describe: _____

28. What do you think can be improved about the train ride? (check all that apply)

- cleanliness of the train
- make more food available on the train
- have more activities on the train
- other, please describe: _____

29. What did you like best about Williams? _____

30. What did you like least about Williams? _____

31. How did you first learn about Williams? (check all that apply)

- through friends or family
- through a travel agent
- through roadside signs
- through a newspaper article
- through a brochure
- through classified newspaper ads
- through a magazine
- through a guide book
- don't remember or are not sure
- other, please specify: _____

32. Which of the following information sources did you use during your visit to the Williams area? (check all that apply)

- brochures, newsletters
- books, guides
- computer programs
- staff at visitor center
- audio tapes
- maps
- video tapes
- displays at visitor center
- tours or interpretive programs
- other, please describe: _____

33. Which of the following ways of providing information would you prefer? (check all that apply)

- written material
- video or computer program
- activities I can do myself
- self-explained exhibits
- knowledgeable local people
- audio programs on cassette
- talk/lecture/slide show
- other, please describe: _____

34. Which terms best describe the interests of members of your party? (check all that apply)

- history buff
- antique collector
- rock hound, amateur geologist
- conservationist, nature or eco-tourist
- angler or hunter
- water sports enthusiast
- boating enthusiast
- team sports enthusiast
- skier
- pilot, skydiver, hang glider
- photographer
- computer enthusiast/tracker
- collector of: _____
- gardener, flower lover
- other, please describe: _____
- video game fan
- shopper
- outdoors person: hiker, camper, climber
- golfer
- art aficionado
- music lover
- movie aficionado
- religious
- crafts person or artist
- like to gamble
- star gazer, amateur astronomer
- horseman or woman
- vegetarian
- book lover

35. Check the category that best describes your family's before tax income. (check one only)

- less than \$15,000
- \$15,001-30,000
- \$30,001-40,000
- \$40,001-60,000
- \$60,001-80,000
- \$80,001-100,000
- over \$100,000

36. Would you describe members of your party as: (check all that apply)

- White
- African American
- Asian or Pacific Islander
- Hispanic
- American Indian
- Other

37. What countries are the members of your party citizens of?

38. Was the person or people who completed this survey male female

Thank you very much for participating in this survey!

Survey No. _____

Survey No. _____

Appendix B. Study Methodology

The four page survey instrument used for this study precedes this section. It was developed to take approximately 10 minutes to complete. The survey was designed at The University of Arizona, but the local tourism committee critically reviewed it and provided suggestions for improvements and additions.

The survey was distributed on randomly selected days at randomly selected times at local hotels and the Williams-Kaibab National Forest Visitor Center for the first six months of the study period. During the second six months, only the days

were randomly selected for the hotels. The Visitor Center distributed two surveys per day, one in the morning and one in the afternoon. A variety of small and large hotels and campgrounds and RV parks were selected to participate. Of the surveys returned, 267 parties stayed at RV parks or campgrounds, 109 parties stayed at small hotels, 261 parties stayed at large hotels (i.e., hotels with 30 rooms or more) and 45 parties were only in Williams for the day. The survey respondents account for 0.5 percent of all room nights (and visitor days in the case of day trip visitors) spent by visitors in

Williams. The accuracy of the results varies by question, however, the overall sampling error for the full sample is generally between four and six percent based on a 95 percent confidence interval.

A total of 682 surveys were returned out of approximately 1,530 surveys distributed. The response rate was 45 percent. A unique aspect of this survey project was our reliance on hotel managers and the visitor center staff in the distribution of the survey. This approach gave these individuals a greater stake in the survey research process.

Appendix C. Estimated Occupancy Rates for Fiscal 1995-96.

	Large	Small	All Hotels	RV Parks/Campgrounds¹
	----- (percent) -----			
June, 1995	73	59	68	60
July	87	62	79	63
August	83	60	75	63
September	74	61	71	59
November	59	45	55	51
December	42	36	40	37
January, 1996	27	20	25	32
February	38	22	33	36
March	53	37	48	36
April	65	46	59	41
May	63	51	60	67
June	82	49	74	61

¹ Several campgrounds and RV parks are closed during the winter and were not included in winter room counts and occupancy estimates.

Appendix D. Interests of Visitors.

	Winter	Summer	Total
	<i>(percent of visitor parties)</i>		
Outdoor Recreation	44	42	43
Shopping	40	41	41
Photography	39	41	40
History	43	34	37
Books	39	32	34
Music	29	32	31
Gardening	29	23	25
Art and Crafts	21	18	19
Conservation/Ecotourism	25	16	19
Golf	20	17	18
Antiques	19	17	18
Fishing/Hunting	14	17	16
Gambling	17	15	16
Computers	16	15	15
Religion	14	12	13
Skiing	12	10	11
Rocks and Minerals	9	11	10
Movies	8	11	10
Other	9	10	10
Video Games	8	10	9
Astronomy	10	9	9
Water Sports	4	11	9
Team Sports	6	10	9
Art	8	9	9
Boating	4	10	8
Collecting	8	8	8
Horses, riding	6	5	5
Vegetarian diet	5	4	4
Flying	5	3	4