

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.

On average, **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 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. 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/mobile home 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/mobile home 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/mobile home 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 by only non-full-year-residents 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.

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