

FLAGSTAFF SNOWPLAY STUDY



Photo: Flagstaff Convention & Visitors Bureau

Prepared for

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By

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EXECUTIVE SUMMARY

The Arizona Hospitality Research & Resource Center (AHRRC) at Northern Arizona University was commissioned by the Flagstaff Convention & Visitors Bureau (CVB) to conduct market research on snowplay visitors to the Flagstaff area for the 2009-10 season. As Arizona's premier winter playground, Flagstaff area organizations have recognized both an obligation and an opportunity to provide safe and satisfying snowplay experiences. The Northern Arizona Winter Recreation Task Force (composed of ADOT, Arizona Snowbowl, City of Flagstaff, Flagstaff Nordic Center, DPS, US Forest Service, Coconino County, and Recreation Resource Management) has worked cooperatively to ensure that accurate and timely information is communicated to the public and to provide safe snowplay experiences.

This research is focused on the opportunities of snowplay and on the size and characteristics of the snowplay market. A total of 450 visitor parties were intercepted at both fee and non-fee snowplay sites and asked to respond to a series of questions. These findings demonstrate that the market is large and that it has considerable economic impact during the otherwise slow Winter season (when Flagstaff hotel occupancy rates typically plunge from the 70-80% range of Summer to the 40-50% range of Winter months); snowplay recreation also helps to provide year-round hospitality employment.

The study found that snowplay visitors are almost entirely from out-of-town, have relatively high household incomes, consist of younger families in large party sizes, that the majority stay overnight in Flagstaff, that they visit other local and area attractions during their trips, and that, perhaps most importantly, most are repeat visitors who are highly satisfied with their snowplay experiences.

Chapter One of the study presents the overall findings, which include the following:

- The majority of surveys (61.6%) were completed on clear and sunny days, while 25.6% were completed on overcast days and 12.9% were collected while it was actually snowing or precipitating.
- The monthly breakdown of surveys collected was 161 in December 2009, 49 in January 2010, 158 in February 2010, and 82 in March 2010. The major snowstorm that buried Flagstaff on January 21st, made roads impassable and necessitated a week to dig out, is largely responsible for the small January total.
- In all, 71.2% of surveys were collected at the Wing Mountain fee-pay site, with the remainder collected at the non-fee sites of Crowley Pit (15.6%), Peak View (8.3%), and Fort Tuthill County Park (4.7%).
- The gender of survey respondents was evenly split between males (49.9%) and females (50.1%)
- Fully 96.4% of snowplay visitors were from out-of-town; only 3.6% were local residents.
- The average (mean) number of adults per party was 2.9 and the average number of children per party was 3.1

- Two-thirds (65.3%) of parties came to snowplay with “Family only,” while another 30.7% were with “Friends and family,” and 4.7% were with “Friends only.”
- The average age of snowplay survey respondents was 38 years – considerably lower than the average age of Flagstaff tourists overall of 49 years – thus, snowplay attracts a different and younger demographic market.
- The average annual household income of snowplay visitor parties was \$79,023 – almost exactly the same income recorded for Flagstaff tourists generally at \$79,056.
- Snowplay visitors knew about snowplay areas in Flagstaff mostly because of their own previous visits, while another 37% heard about them online, and 27% had word-of-mouth referrals from friends and family.
- Snowplay visitors were highly satisfied with their experience, giving a ranking of 9.5 on a scale from one to 10, where 10 is high, for the overall experience; no variable (road conditions, signage, traffic, parking, etc.) rated lower than 8.6.
- Snowplay visitors were almost universally Arizona residents – only 3.6% were from out-of-state.
- The most common single Arizona city of origin was Phoenix (31.2%); Mesa, Glendale, Scottsdale, Chandler, Peoria, Gilbert, Anthem, Surprise and Sun City rounded out the top ten communities.
- Snowplay was overwhelmingly the primary reason (86%) for the winter visit to Flagstaff; only 14% noted some other reason (a train ride on the Grand Canyon Railway’s Polar Express was most popular among these).
- Two-thirds (66.8%) of respondents were repeat snowplay visitors, while 33.2% were first-time snowplay visitors.
- Most snowplayers typically make two trips to Flagstaff annually for snowplay; over the past year they had visited Flagstaff an average of 2.5 times.
- More than half of snowplay parties (55.1%) spent the night in Flagstaff on their trip, while 44.9% were on day-trips only.
- The average number of hours for daytrippers was 6.8 hours; the average number of nights spent was 1.8 nights.
- Roughly nine out of 10 overnight snowplay parties (88.8%) stayed in a hotel/motel, 5% in a vacation condo or timeshare, and 4.2% in the home of friends and family; smaller percentages stayed in B&Bs, RV parks or some other lodging.
- The average nightly room rate paid by snowplayers was \$87/night.
- Average expenditures per-party-per-day were: Lodging (\$125), Restaurant/bar (\$89), Groceries (\$38), Transportation (\$55), Shopping (\$61), Recreation/entrance fees (\$14), and “Other” (\$152). The average number of people that these expenditures covered was 5.5 people/party (median of 4 people/party).
- Snowplayers also engaged in other activities during their visit to Flagstaff, the most of which common were: shopping, visiting Historic Downtown Flagstaff, and visiting Arizona Snowbowl.
- The economic impact of snowplay visitors at Wing Mountain and dispersed sites during the 2009-2010 season was calculated as \$11.2 million in direct spending, which produced an additional \$2.4 million in indirect and \$2.6 million in induced impacts for a

total economic impact of \$16.2 million. This amount of spending produced an additional \$1.36 million of regional tax revenue and 221 FTE jobs.

Chapter Two of this report provides a comparison between visitors at the Wing Mountain *fee* area and those at the *free* sites (Crowley Pit, Peak View and Fort Tuthill), but found few differences between the two groups. Only minor differences appeared in their age, gender, origins, party size or party composition, satisfaction, trip purpose or frequency of visits. The most notable differences between the fee and non-fee snowplay groups were in these areas:

- The average annual income of Wing Mountain visitor parties \$84,112, compared to an average annual income of \$67,628 for those at the non-fee sites, suggesting that income was a factor in their choice of sites.
- Those at non-fee sites were twice as likely as those at Wing Mountain to have gotten information from previous visits or local businesses that directed them to the free sites, while Wing Mountain visitors were most likely to have heard about this fee-pay site from a website or online.
- Finally, Wing Mountain visitors spent more on lodging, groceries and in restaurant/bars, while those at non-fee areas spent more on shopping (gear/clothing).

Chapter Three of the report provides an additional comparison between visitors during three time periods – holidays, weekdays and weekend days. As in the previous comparison few differences were found in most areas. Several notable differences, however, included:

- Weekday and Holiday visitors made greater use of websites and online information sources, while weekend visitors relied more on previous visits or referrals from local businesses.
- Weekend visitors had somewhat higher incidence of repeat visits than weekday or holiday visitors.
- Holiday visitors were more likely to spend the night and had longer overall stays (hours and days) than weekday or weekend visitors.
- Finally, holiday visitors were more likely to also visit Grand Canyon National Park or Historic Downtown Flagstaff during their visit, while weekend visitors were most likely to visit Arizona Snowbowl, Downtown Flagstaff and the Museum of Northern Arizona along with shopping; weekday visitors were also inclined to shop, visit Arizona Snowbowl and Lowell Observatory.