

## Executive Summary

This survey of visitors to Flagstaff, Arizona was undertaken in an effort to gather more reliable visitor profile data than is available from statewide or national panel surveys, which often contain too few cases to represent visitation outside the metro Phoenix and Tucson areas with any confidence. This survey process collected a total of 1,068 surveys from various locations within Flagstaff over a 12-month period – from April 2008 through March 2009 – a more than sufficient sample size to provide reliable results. The information gathered here will assist the Flagstaff Convention & Visitors Bureau with targeted marketing, product development, and advocacy for an industry that is critical to the health of the local and regional economy.

Generally, Flagstaff operates as both a pass-through and a primary destination for well-to-do couples on leisure vacations, who stay overnight, dine out, visit national parks and cultural and historic sites in the area. A summary of the specific findings of the visitor survey follows:

- ❖ Data for this tourism survey were collected at five locations: the Flagstaff Visitor Center (35%), Lowell Observatory (25%), the Fairfield Inn (16%), Little America Hotel (8%), and through intercepts in the historic downtown district (4%).
- ❖ Equal numbers of male (50.5%) and female (49.5%) visitors appeared in the sample.
- ❖ The average age of visitors was 49 years (median age 51 years), with males (47 years) slightly younger than female visitors (51 years).
- ❖ The average party size was 3.2 persons (1.5 men, 1.7 women). Over a fifth of all parties (22 percent) traveled with children under the age of 18; the average number of children in these parties was 2.2.

- ❖ The great majority of visitors (60%) traveled in family only groups, while 14% traveled in groups of family and friends. Friends only parties (15%), those traveling alone (8.5%), with business associates (2.1%), and in tour groups (1.2%) constituted the remaining travel party types.
- ❖ Travelers to Flagstaff had relatively high average annual household income, at \$79,056, with median income at \$80,000.
- ❖ Flagstaff serves as both a hub for visitors to northern Arizona and as a primary destination. Of total visitors, 42% said Flagstaff was their primary destination, while 58% said it was not. For 48% of visitors, however, northern Arizona *was* the primary destination – especially Grand Canyon NP and Sedona; one-third (33%) were bound for other US states and 20% were passing through to other Arizona locations.
- ❖ Most visitors to Flagstaff were traveling for vacation-leisure purposes (52.3%), followed by those just passing through (22.5%), day trips (17.9%), visiting friends and relatives (11.4%), and weekend visits (8.3%). Other purposes such as second home stays, business and conferences, and climate relief completed the trip purposes.
- ❖ A majority of visitors to Flagstaff traveled in a private vehicle (53.3%), and a further third (31.3%) traveled in a rental car. Only small percentages traveled in RV/campers, by train, air, or other means.
- ❖ Day visitors spent an average of 5.7 hours in Flagstaff while overnight visitors stayed an average of 2.6 nights.
- ❖ Overnight accommodations for Flagstaff visitors were dominated by hotels/motels, which were used by more than three-fourths of all visitors (77%) – a very positive finding for the lodging industry and a producer of community bed tax revenue. Much

- smaller percentages stayed in private homes (7.4%), RV parks and campgrounds (6.1%), timeshares (4.5%), or Bed and Breakfast properties (2.2%).
- ❖ Almost half (44.4%) of all overnight visitors stayed in Flagstaff prior to taking the survey, while fewer (39%) stayed in Flagstaff after taking the survey – a finding that provides further evidence of Flagstaff as a pass-thru or regional tourism hub.
  - ❖ One-third of Flagstaff visitors are Arizona residents (33%), followed by those from neighboring California (13.8%). Other states in the top 10 contributors of visitors were: Texas, Wisconsin, Florida, New York, Washington, Illinois, New Mexico and Pennsylvania – all common origin states for Arizona generally.
  - ❖ More than half of all Arizona resident visitors to Flagstaff came from the greater Phoenix area (54.1%), and 11% were from Tucson. Together, these two metro areas accounted for about two-thirds of all resident visitors; however, 53 separate Arizona cities and towns were represented in the database.
  - ❖ With world-class attractions such as the Grand Canyon, international visitors have long been a staple of northern Arizona tourism. In this survey, international visitors represented 17% of the Flagstaff sample. Topping the list was the United Kingdom (24%), followed by Canada (21%), Germany (9.1%), and Australia (8.0%). France, Belgium, the Netherlands, Italy, Switzerland, New Zealand and Denmark, contributing fewer than 5% each, rounded out the top foreign countries.
  - ❖ Visitors had moderate expenditures in Flagstaff. Average per-party per-day expenditures by category were: lodging (\$175), restaurant and grocery (\$107), transportation including gas (\$93), shopping or arts and crafts purchases (\$90), recreation-tour-entrance fees or permits (\$65), and “other” (\$116).

- ❖ Visiting state and national parks, visiting cultural and historic sites, and dining out were the most popular activities for visitors to Flagstaff. Visiting museums, hiking, and visiting Forest Service lands were also popular.
- ❖ Visitor activities that registered the least interest on the part of visitors were: playing golf, mountain biking, camping/RV stays, fishing, skiing/snow play and boating. This is not to say that visitors do not engage in these activities; they do so at lower levels or only seasonally (e.g., skiing) as opposed to year-round.
- ❖ Historic Downtown Flagstaff was the most-visited attraction, by more than 70% of visitors. Also in the top group were: Grand Canyon NP, Route 66, Lowell Observatory, and Sunset Crater National Monument.
- ❖ Visitors to Flagstaff evidenced high levels of satisfaction with their trips. Overall, satisfaction levels achieved an 8.5 mean score out of a possible 10 and a median score of 9.0.
- ❖ Visitors to Flagstaff had an estimated \$386.9 million in direct expenditures, which resulted in an indirect economic impact of \$50 million, and induced impact of \$64.3 million for a total economic impact of \$501.3 million. Indirect business taxes based on direct expenditures produced an additional \$30.4 million tax impact and the total economic impact supported 4,234 direct jobs or 5,483 direct and indirect jobs.