

# ***FLAGSTAFF SNOWPLAY STUDY***



Photo: Flagstaff Convention & Visitors Bureau

Prepared for

The Flagstaff Convention & Visitors Bureau

By

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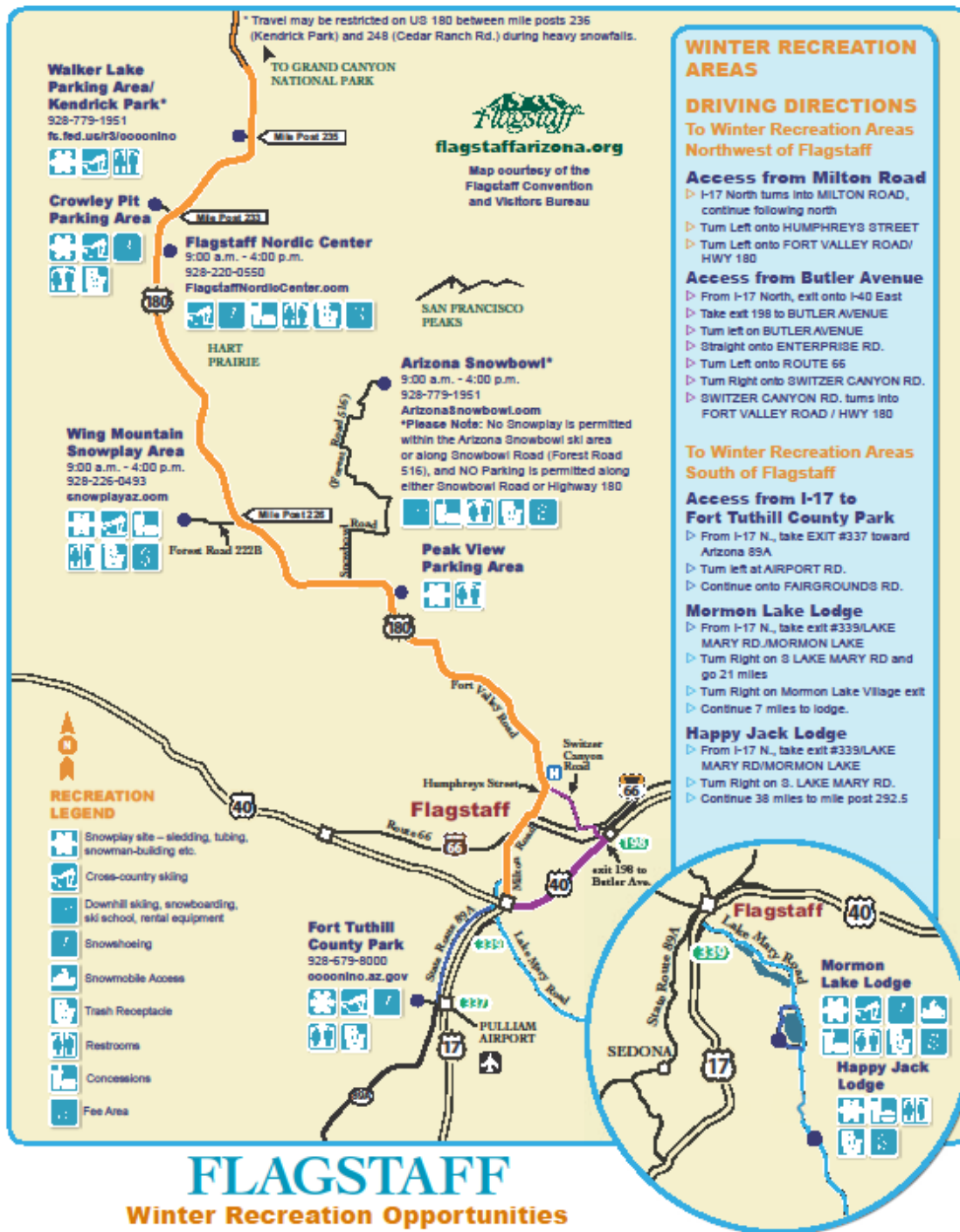
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**MAP WITH SURVEY SITE LOCATIONS**  
(available at [www.flagstaffarizona.org](http://www.flagstaffarizona.org))



**FLAGSTAFF**

**Winter Recreation Opportunities**

[flagstaffarizona.org](http://flagstaffarizona.org)

For more information please contact the  
Flagstaff Visitor Center (877) 878-9377 • [visitorcenter@flagstaffaz.gov](mailto:visitorcenter@flagstaffaz.gov)

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Finally, special recognition is due Melinda Bradford, Research Technician for the AHRRC, who went above and beyond on this project – from creating the survey instrument in Teleform® software, to scanning the data, and pitching in to collect surveys at Wing Mountain and the other dispersed sites so that we could reach our target numbers.

Most of all, however, we owe a debt of gratitude to the many snowplay visitors who graciously took time out of their precious family play days to help us understand the impact of snowplay on Flagstaff.

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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 21<sup>st</sup>, 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.

## Background

Flagstaff has long been Arizona's destination for winter fun. In addition to skiing, thousands of desert dwelling families make the trek every winter to sled and play in the snow. As the population of the state has grown, the numbers of snowplayers has grown, too, putting greater pressure on northern Arizona roadways and on the U.S. Forest Service to provide designated snowplay areas, areas that are plowed and provide parking. One Forest Service official was quoted as estimating that as many as 15,000 snowplayers flocked to the Flagstaff area on "long holiday weekends."<sup>1</sup>

Over the years, the US Forest Service directed visitors to a number of areas along Highway 180 for snowplay, including:

- Mile marker 5.2 on Snowbowl Road
- Wing Mountain, 2.8 miles north of Snowbowl Road on Highway 180
- Peak View, 6.5 miles north of Flagstaff on the right side of the road
- The Flagstaff Nordic Center
- Crowley Pit on the left side of the highway
- Kendrick park further north opposite the Chapel of the Holy Dove.
- In town, Buffalo Park and the slopes behind Kinsey Elementary School were also recommended.

(See Map on page 7 for reference)

For many years, snowplayers also made the drive up to Arizona Snowbowl. However, for safety and insurance reasons along with increasing parking and traffic congestion issues, Snowbowl decided that snowplayers could no longer be allowed on their property.<sup>2</sup> Instead in 2001, Snowbowl proposed to build a separate snowplay/tubing area at the base of their property at the intersection of Snowbowl Road and Highway 180 on Fort Valley Road. The idea of a four-story snow tubing hill proved, however, unacceptable to Fort Valley residents and the proposal never made it through the Coconino County planning and zoning process.

Thus, efforts by the city, the Forest Service, ADOT, DPS and others to find safe and managed areas for out-of-town snowplayers continued. In 2004, Flagstaff residents voted down a \$4.1 million city proposal to build a sledding site behind Coconino High School on the east side of McMillan Mesa. Yet, the urgency to get snowplayers off the roadside and into safe parking areas continued. Everyone wanted to avoid the tragedy of some kid sliding out into traffic on the highway. As one DPS officer put it, "It's only a matter of time before a little kid jumps out into traffic."<sup>3</sup> Finally in 2006, based on recommendations from a local task force, a pay-to-play site was opened at Wing Mountain, which charges \$10 per car for up to five people and \$2 for each additional person. Recreation Resource Management, Inc. of Phoenix manages the property and invested \$50,000 at Wing Mountain, including the purchase of heavy equipment

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<sup>1</sup> Cyndy Cole, "More pay-to-sled sites proposed", *Arizona Daily Sun*, January 17, 2007.

<sup>2</sup> Tayloe McConnell, "No way on snowplay", *Arizona Daily Sun*, February 21, 2003

<sup>3</sup> Ibid.

for moving and grooming snow.<sup>4</sup> The initial 500 parking spaces have now expanded to accommodate 800 cars in the improved parking lot. This site also provides port-a-potties, warming fires, sleds for sale, trash bins, and a concession stand for refreshments. Wing Mountain has resolved many problems, but its success has created some new ones, as thousands of snowplayers on holidays and weekends can cause traffic problems and severe congestion up and down Highway 180.<sup>5</sup>

Since Flagstaff appears to have both an obligation and an opportunity to provide safe and satisfying snowplay areas for visitors from the Valley, the City of Flagstaff's Convention & Visitors Bureau (CVB) wanted more research to guide policy decisions. They wanted to understand how snowplay visitors compare to Snowbowl skiers, and they wanted information on the origins of snowplay visitors, how long they stay in Flagstaff, what percentage spends the night, their party size, and the overall economic impact of their visits. To this end, the Flagstaff CVB commissioned the Arizona Hospitality Research & Resource Center in 2009 to conduct a survey of visitors to the existing snowplay areas. The goals of the study were to:

- Distribute and collect completed surveys at Wing Mountain and non-pay dispersed snowplay areas during the winter season from December of 2009 through March of 2010, with special emphasis on three distinct time periods (snow permitting):
  - Holiday visits (e.g., Christmas/New Year)
  - Weekend visits
  - Weekday visits
- Develop and distribute a survey instrument to visitors at Wing Mountain and the dispersed areas in order to understand visitor activity patterns and the spending of out-of-towners visiting these winter attractions.
- Collect data on visitor origins, demographics, party characteristics, trip planning, activities/attractions visited in conjunction with the trip, satisfaction with the experience, and snow-related spending patterns; calculate the economic impact of snowplay in Flagstaff.
- Provide a comment box for people to offer suggestions of ways to improve their experience.
- Compare visitors at the fee area of Wing Mountain with the non-fee areas (Crowley Pit, Peak View, and Fort Tuthill County Park).

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<sup>4</sup> Cyndy Cole, "From free to fee", *Arizona Daily Sun*, December 19, 2006.

<sup>5</sup> Larry Hendricks, "Winter gridlock a worry", *Arizona Daily Sun*, November 13, 2009; Cyndy Cole, "How to unclog snowplay traffic?", *Arizona Daily Sun*, January 12, 2009; Sun Staff, "Holiday gridlock?", *Arizona Daily Sun*, January 15, 2010.

## METHODS

To accomplish these objectives, the AHRRRC used the following methods:

- Determined a target sample size of between 300 and 450 completed surveys depending on the season's snowfall; the ample snowfall allowed the larger target of 450 to be reached, which is ample to provide confidence at the 95% level and +/- 5% margin of error.
- Created the survey instrument in Teleform™ scanning software for rapid and accurate data capture; survey categories were created, in part, to parallel those in the Snowbowl survey
- Printed all survey forms
- Stationed survey workers at the collection sites (Wing Mountain, Crowley Pit, Peak View and Fort Tuthill) to intercept visitors and get completed surveys
- Cleaned, scanned and entered all data from completed survey forms
- Analyzed data using the SPSS statistical package
- Created all data tables
- Crafted a final narrative report of all findings, including an Executive Summary.

## SURVEY FINDINGS: Chapter One

When faced with the collection of outdoor surveys during winter months, the weather is always a factor. Some days it is impossible to survey because of bad weather; other days out-of-town visitors are unable to travel to winter recreation areas due to heavy snowfall or road closures. It is also possible that weather conditions may influence visitors' satisfaction with their snowplay experiences. For all these reasons, the survey collected data on weather conditions the day of the survey. These findings are presented in Table One, which shows that most surveys (61.6%) were collected on days that were clear and sunny. About one-fourth of total surveys (25.6%) were collected on overcast days, while the remaining 12.9% were collected on days when it was actually snowing or precipitating. See Table One.

**Table 1. Weather Conditions**

	Count	Column N %
Sunny-Clear	277	61.6%
Overcast	115	25.6%
Snowing-Precipitation	58	12.9%
Total	450	100.0%

The first day of survey collection was December 12, 2009, which was the weekend after the first significant snowfall of the season which came on December 8<sup>th</sup> depositing three feet of snow; surveys continued to be collected through the remainder of December. In January, however, two factors dramatically influenced survey collection. First, the snowfall from the December storm had diminished dramatically to the extent that by January 13<sup>th</sup> Wing Mountain reported it was closed due to lack of snow. Then, on January 21<sup>st</sup> a major snow event hit Flagstaff, producing the second highest snowfall totals in the city's history, a snowfall that eventually shut down the town. Interstates 40 and 17 were both closed and ice-packed for the better part of a week. It took the town of Flagstaff many days to dig out of the storm and to plow all city and peripheral roadways. Under these conditions, it was too difficult for visitors to consider making the drive north for snowplay; thus, relatively few surveys were collected in January.

By early February conditions had improved and surveys began to be collected again in earnest; survey collection continued throughout the remainder of February and through the first two weeks of March. Wing Mountain officially closed for the season on March 17<sup>th</sup>. However, since this was during the middle of Spring Break, many out-of-town visitors continued to travel north for snowplay, and these visitors were intercepted by our survey workers at the non-pay sites through the 19<sup>th</sup> of March, which constituted the final day of surveying for the study.

A total of 450 surveys were collected, and the monthly survey collection totals are shown below. The breakdown of surveys by date is shown in Table Two that follows:

- December 161
- January 49
- February 158
- March 82



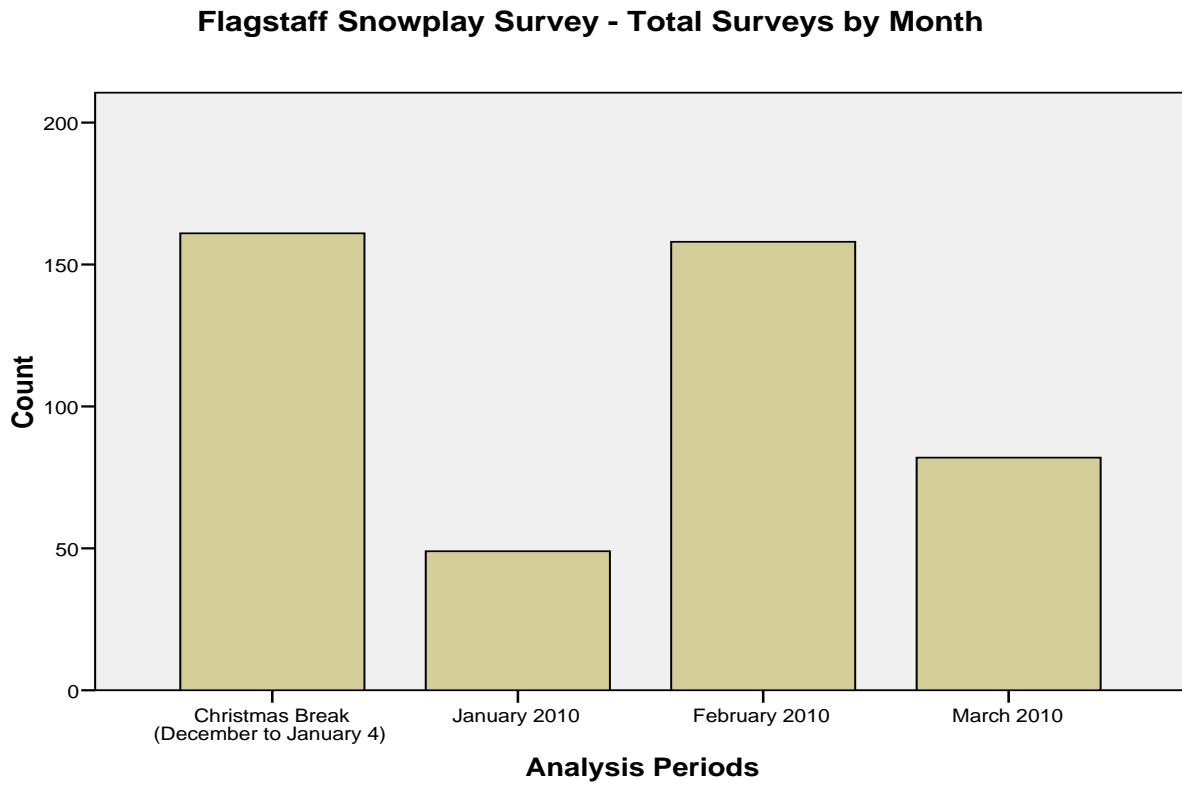
**Table 2. Actual Date of Survey**

**Flagstaff Snowplay Survey - Actual Date of Survey**

	Count	Column N %
12/12/2009	27	6.0%
12/13/2009	12	2.7%
12/18/2009	25	5.6%
12/19/2009	20	4.4%
12/20/2009	27	6.0%
12/27/2009	27	6.0%
12/28/2009	23	5.1%
01/30/2010	31	6.9%
01/31/2010	18	4.0%
02/07/2010	15	3.3%
02/11/2010	7	1.6%
02/14/2010	30	6.7%
02/15/2010	18	4.0%
02/20/2010	3	.7%
02/21/2010	42	9.3%
02/26/2010	7	1.6%
02/27/2010	26	5.8%
02/28/2010	10	2.2%
03/06/2010	45	10.0%
03/14/2010	18	4.0%
03/19/2010	19	4.2%
Total	450	100.0%

The numbers of surveys collected per month are graphically displayed in Figure 1.

Figure 1. Total Surveys by Month



Snowplay surveys were collected at both the fee-pay site at Wing Mountain and at the dispersed non-fee sites at Crowley Pit, Peak View and Fort Tuthill, in order to provide comparison data between the fee and non-fee sites. As shown in Table Three, approximately three-fourths of surveys (71.2% ) were collected at the paid Wing Mountain site and one fourth at the non-paid sites. Of the dispersed sites, 15.6% were collected at Crowley Pit, 8.3% were collected at Peak View, and 4.7% were collected at Fort Tuthill. One survey was collected at Walker Lake, off Highway 180. (Note: The Flagstaff Nordic Center was included on the survey form, although a subsequent decision was made that we would not survey at that location.) See Table Three below.

**Table 3. Survey Sites**

**Flagstaff Snowplay Survey - Survey Sites**

	Count	Column N %
Wing Mountain	319	71.2%
Flagstaff Nordic Center	0	.0%
Crowley Pit (Hwy 180)	70	15.6%
Walker lake (Hwy 180)	1	.2%
Fort Tuthill	21	4.7%
Peak View	37	8.3%
Total	448	100.0%

(Note: The 448 total under "Count" means that this information was missing for 2 respondents.)

The remainder of Chapter One summarizes the overall survey findings. Chapter Two presents a comparison, for all survey variables, between the paid and non-paid sites, while Chapter Three presents a comparison, for all survey variables, between holiday, weekend and weekday snowplay visitors.

For the overall sample, survey respondents were evenly split between males and females, as shown in Table Four.

**Table 4. Gender of Survey Participants**

**Flagstaff Snowplay Survey - Gender of survey participants**

	Count	Column N %
Male	215	49.9%
Female	216	50.1%
Total	431	100.0%

Of significance, almost everyone who was randomly encountered at all snowplay sites, was from out-of-town. Fully 96.4% were out-of-town visitors, while only 3.6% were locals defined as anyone living within 50 miles of Flagstaff.

**Table 5. Are you from Flagstaff?**

**Flagstaff Snowplay Survey - Are you from the Flagstaff area (within 50 miles of Flagstaff, including Parks, Williams or Winslow) or do you own a second home in Flagstaff?**

	Count	Column N %
Yes	16	3.6%
No	425	96.4%
Total	441	100.0%

The numbers of adults and children in these visitor parties averaged 2.9 adults and 3.1 children – the mean value. The median, however – which represents the mid-point of the range where one half of a group is above the median and one half below – was two adults and two children.

**Table 6. How many adults and children in your party?**

**Flagstaff Snowplay Survey - Including yourself how many adults (over 18 years) and children are in your party?**

	Mean	Median
Including yourself how many adults 18 years and older are in your party today?	2.9	2.0
How many children under 18 years and younger are in your party today?	3.1	2.0

Travel party type was dominated by those visiting with “Family only,” which constituted almost two-thirds of parties (65.3%). Roughly another third (30.7%) were composed of “Family and friends,” while about one group in twenty (4.7%) was visiting with “Friends only.” Only very small percentages made the snowplay visit with an organized group (1.1%) or with coworkers (.2%). See Table Seven.

**Table 7. Party Type**

**Flagstaff Snowplay Survey - What type of party are you snowplaying with?**

	Count	Column N %
Family only	294	65.3%
Family and Friends	138	30.7%
Friends only	21	4.7%
Organized group (club church tour group etc)	5	1.1%
Other	2	.4%
People I work with	1	.2%
Total	450	100.0%

In Table Seven above, the “other” party types, one was a School group. See Table Eight.

**Table 8. “Other” Party Type**

**Flagstaff Snowplay Survey - Other party type you are snowplaying with?**

	Count	Column N %
NO OTHER PARTY TYPE	449	99.8%
SCHOOL GROUP	1	.2%
Total	450	100.0%

The average age of survey respondents was 38 years. Contrast this with the average age of visitors to Flagstaff generally – which we know from data collected for the *Flagstaff Tourism Survey* conducted in 2009 – which was 49 years.<sup>6</sup> It is clear, therefore, that snowplay visitors represent a different and much younger demographic market.

The snowplay market is also different in that 99% of parties contained children under age 18. This is in sharp contrast to Flagstaff visitor parties which normally consist of adults only and contain few children; only 22% of typical tourist parties have any children.<sup>7</sup> Thus, snowplay recreation is quite clearly an experience enjoyed by younger families with children, and it attracts very different visitors to Flagstaff during an otherwise slow season.

**Table 9. Age of Survey participant**

**Flagstaff Snowplay Survey - Age of participant**

	Count	Column N %
18-29 years	90	20.1%
30-39 years	170	37.9%
40-49 years	133	29.7%
50-59 years	34	7.6%
60-69 years	16	3.6%
70-79 years	1	.2%
80 plus years	0	.0%
Refused	4	.9%
Total	448	100.0%

**AVERAGE AGE = 38.0 YEARS**

Given the different age demographic of snowplay visitors, what about their average income? The average annual household income of Flagstaff’s snowplay visitors was \$79,023. This is, in fact, almost identical to the average annual income of Flagstaff tourists generally, which was \$79,056 in the 2009 tourism study. These income figures are substantially higher than the average Household Income of Flagstaff residents at \$51,396<sup>8</sup>. See Table Ten for the household income results.

<sup>6</sup> AHRRC, *Flagstaff Tourism Survey*, April 2009.

<sup>7</sup> Ibid.

<sup>8</sup> Environmental Systems Research Institute 2008/2013 ESRI Community Data Catalog

**Table 10. Annual household income**

**Flagstaff Snowplay Survey - Annual household income before taxes?**

	Count	Column N %
Under \$25,000	30	6.7%
\$25,000 - \$49,999	67	15.1%
\$50,000 - \$74,999	100	22.5%
\$75,000 - \$99,999	68	15.3%
\$100,000 - \$124,999	61	13.7%
\$125,000 - \$149,999	26	5.8%
Over \$150,000	27	6.1%
Refused	66	14.8%
Total	445	100.0%

**AVERAGE INCOME = \$ 79,023**

It is important for Flagstaff tourism officials to understand the ways out-of-town visitors heard about or gathered information about snowplay in Flagstaff. The most common response to this question turned out to be something “Other” than the choice fields listed on the form. When asked to elaborate, snowplay visitors told us that the most important of these “other” sources were their previous visits, since most snowplay visitors were repeat visitors; also, many commented that they heard about the snowplay area from a local business. For the total list of “Other” responses to this question, see Appendix A at the end of this document.

Second in importance were Website/Online sources, used by 37% of snowplay visitors. This was followed by referrals from Friends and family (27%). Very few got information from a visitor center (2.4%) or media source. The results are shown in Table 11.

**Table 11. Information Source of Flagstaff snowplay areas**

**Flagstaff Snowplay Survey - Where did you hear about or get information on Flagstaffs snowplay areas?**

	Count	Column N %
Other source	176	42.8%
Website-Online?	152	37.0%
Family & Friends?	111	27.0%
Visitor Center or Government Office?	10	2.4%
Radio-TV?	1	.2%
Newspaper-Magazine?	1	.2%
Total	411	100.0%

The next question for snowplay visitors concerned their satisfaction with a number of attributes of the experience. On a scale from one to 10, where 10 is high, they were asked to rate their level of satisfaction with locating the snowplay area, road conditions (including weather-induced), traffic conditions, parking availability, the current snowplay experience, and the overall experience on this trip to Flagstaff.

As shown in Table 12, the overall experience visiting Flagstaff garnered the highest rating at 9.5, a very high rating. The lowest satisfaction ratings, although still very high on the scale, were for locating the snowplay area and Flagstaff area road conditions (8.6 each). The current snow sledding experience achieved the highest single ranking, with 68% of all survey respondents giving it a “10!” The highest negative scores (e.g., below 5 on the scale) were for road conditions, but even these negative ratings were from a small minority of overall visitors. In general, the snowplay experience was very highly rated by visitors, who did not seem to be bothered by the traffic congestion, parking, weather conditions or any other factors related to their snowplay experience. See Table 12.



**Table 12. Satisfaction with the snowplay experience**

**Flagstaff Snowplay Survey - Tell us your level of satisfaction with the following:**

	Low level of satisfaction	2	3	4	Neither low nor high level of satisfaction	6	7	8	9	High level of satisfaction	Mean
Locating snow play areas & signage to areas	.2%	1.6%	1.4%	.9%	4.7%	4.9%	8.4%	15.3%	14.7%	47.9%	8.6
Flagstaff area road conditions (taking into account the weather)	.5%	.5%	1.4%	1.6%	5.1%	4.0%	8.6%	16.0%	15.1%	47.2%	8.6
Traffic conditions in traveling to snow play areas	.0%	.2%	1.2%	2.6%	4.0%	3.0%	6.5%	16.8%	17.5%	48.3%	8.7
Parking availability & conditions at snow play area	.5%	.5%	.5%	1.4%	2.1%	2.1%	5.8%	12.1%	15.3%	59.8%	9.0
Your current snow play-sledding experience	.0%	.2%	.0%	.2%	2.2%	.5%	5.8%	8.5%	14.7%	67.9%	9.3
Your overall experience visiting Flagstaff on this trip	.0%	.0%	.0%	.2%	.7%	.0%	2.8%	8.6%	21.4%	66.2%	9.5

Where do Flagstaff’s snowplay visitors come from? The permanent residence of almost all snowplay visitors – fully 97.4% – was within Arizona. Only a mere 3.6% were residents of some other state. See Table 13.

**Table 13. In-state vs. Out-of-state visitors**

**Flagstaff Snowplay Survey - What is the state of your permanent residence?**

	Count	Column N %
Florida	2	.5%
South Dakota	1	.2%
Montana	1	.2%
Texas	3	.7%
Arizona	416	97.4%
California	4	.9%
Total	427	100.0%

The most common communities of origin for Arizona snowplayers are shown below. The top ten communities are shown with their percent share of total snowplay visitors. Together, these 10 account for fully 79.3 percent of Arizona origins.

- Phoenix 31.2%
- Mesa 8.2%
- Glendale 7.7%
- Scottsdale 7.2%
- Chandler 6.6%
- Peoria 6.4%
- Gilbert 5.4%
- Anthem 2.6%
- Surprise 2.0%
- Sun City 2.0%

All communities of origin are listed in Table 14 following.

**Table 14. Place of Residence-Arizona**

**Flagstaff Snowplay Survey - What is the Arizona community of your permanent residence?**

	Count	Column N %
ANTHEM - DESERT HILLS	10	2.6%
AVONDALE	5	1.3%
GOODYEAR	6	1.5%
BUCKEYE	6	1.5%
BULLHEAD CITY	1	.3%
CAVE CREEK	2	.5%
CHANDLER	26	6.6%
COOLIDGE	1	.3%
CORONA DE TUCSON - VAIL	1	.3%
CORONADO	1	.3%
COTTONWOOD	2	.5%
DEWEY	1	.3%
EL MIRAGE	4	1.0%
FLAGSTAFF	1	.3%
FORT LOWELL	1	.3%
GILBERT	21	5.4%
GLENDALE	30	7.7%
GOODYEAR	2	.5%
GUADALUPE	6	1.5%
HEREFORD	1	.3%
HIGLEY	2	.5%
LAVEEN	2	.5%
LITCHFIELD PARK	4	1.0%
MESA	32	8.2%
NEW RIVER	2	.5%
ORO VALLEY	4	1.0%
PEORIA	25	6.4%
PHOENIX	122	31.2%
POMERENE	1	.3%
POSTON	1	.3%
PRESCOTT VALLEY	2	.5%
SADDLEBROOKE	1	.3%
SAHUARITA	1	.3%
SCOTTSDALE	28	7.2%
SIERRA VISTA	1	.3%
SUN CITY	8	2.0%
SUN LAKES	4	1.0%
SURPRISE	8	2.0%
TEMPE	4	1.0%
TOLLESON	5	1.3%
TUCSON	5	1.3%
WADDELL	1	.3%
Total	391	100.0%

Was snowplay the primary reason for these winter visits to Flagstaff. The answer is an overwhelming “Yes.” Fully 86% of respondents indicated that the primary reason for their visit to Flagstaff was for snowplay. The remaining 14% said that snowplay was not the primary reason. See Table 15.

**Table 15. Primary Reason for visit**

**Flagstaff Snowplay Survey - Is snowplay in Flagstaff the primary reason for this visit?**

	Count	Column N %
Yes	369	86.0%
No	60	14.0%
Total	429	100.0%

Those who responded “No” to this question were asked to indicate what the primary reason was for their visit. As shown in Table 16, the most common other reason for the visit was to attend the Polar Express. The Polar Express is a winter experience offered by the Grand Canyon Railway that has grown into a major annual event attracting thousands of visitors. Based on the very popular book by Chris Van Allsburg, a Caldecott Medal award-winning children's author and illustrator, this event is staged annually during the Christmas season. Polar Express visits were listed most often as the “other” reason for the visit to northern Arizona, although a number of parties (five) also indicated that their visit was linked to an activity at NAU.

This finding may offer an opportunity for the Flagstaff CVB to partner with the Grand Canyon Railway and offer package deals that encourage additional Polar Express visitors to consider staying an extra day for snowplay. See results of “other” reason for the visit in Table 16.

**Table 16. Other primary reason for the visit**

**Flagstaff Snowplay Survey - If No what is the primary reason for this visit?**

	Count	Column N %
NO OTHER PRIMARY REASON	401	89.1%
ASSOCIATION MEETING	1	.2%
AUDITION FOR NAU-MUSIC PROGRAM	1	.2%
BUSINESS	1	.2%
DAY TRIP TO FLAGSTAFF FROM PHOENIX FOR LEISURE	1	.2%
ESCAPE FROM STRESS	1	.2%
FAMILY	1	.2%
GRADUATION	2	.4%
GRAND CANYON	2	.4%
GRAND CANYON NP	1	.2%
HOLIDAYS	1	.2%
JUST TO GET OUT OF PHOENIX	1	.2%
JUST VISITING	1	.2%
LEISURE TRAVEL GENERALLY	1	.2%
NAU JAZZ FESTIVAL (FAMILY MEMBER WAS PARTICIPATING)	1	.2%
POLAR EXPRESS	16	3.6%
PRE-PENSION HOLIDAY	1	.2%
SKIING	1	.2%
SKIING AT SNOWBOWL	1	.2%
SKIING/SIGHTSEEING	1	.2%
SNOWBOARDING	3	.7%
SNOWBOARDING/SKIING	1	.2%
SPRING BREAK	1	.2%
TO VISIT GRAND CANYON	1	.2%
TRAIN RIDE	1	.2%
VACATION-SPRING BREAK	1	.2%
VACATION	1	.2%
VISIT UNIVERSITY	1	.2%
VISITING STUDENT AT NAU	1	.2%
WEEKEND VISIT		
GENERALLY-FROM PHOENIX AREA	1	.2%
WINSLOW AZ	1	.2%
Total	450	100.0%

Another important question for visitors was to establish whether this was their first visit to Flagstaff for snowplay or if they were repeat visitors. Of considerable significance is the fact that two-thirds of survey respondents – 66.8% – were repeat snowplay visitors, while one third indicated that this was their first trip to the area for snowplay. See Table 17.

**Table 17. Is this your first visit to Flagstaff for snowplay?**

**Flagstaff Snowplay Survey - Is this your first visit to Flagstaff that includes snowplay?**

	Count	Column N %
Yes	140	33.2%
No	282	66.8%
Total	422	100.0%

As a follow-up question repeat visitors were asked how often they typically come to Flagstaff for snowplay during the winter. The average number of snowplay visits was two visits annually (mean and median). See Table 18.

**Table 18. Number of annual visits for snowplay**

**Flagstaff Snowplay Survey - If no how often do you typically come to Flagstaff in the winter for snowplay?**

	Mean	Median
If No how often do you typically come to Flagstaff in the winter season for snow play?	1.9	2.0

Finally, respondents were asked to specify the number of times they have visited Flagstaff in the past 12 months for any reason. The average (mean) was 2.5 visits, while the median number of visits was two. This suggests these visitors come largely for snowplay, and no other reason. See Table 19.

**Table 19. Number of visits to Flagstaff in the past 12 months**

**Flagstaff Snowplay Survey - How many times have you visited Flagstaff in the past 12 months?**

	Mean	Median
How many times have you visited Flagstaff in the past 12 months?	2.5	2.0

How many snowplay travel parties stay overnight in Flagstaff? According to the survey, more than half – 55.1% – stayed overnight in Flagstaff, while the remainder (44.9%) were day visitors only. See findings in Table 20.

**Table 20. Stay overnight in Flagstaff**

**Flagstaff Snowplay Survey - How much time in total will you spend in Flagstaff on this trip?**

	Count	Column N %
Day trip only	189	44.9%
Overnight trip	232	55.1%
Total	421	100.0%

For those visitors who were day trip visitors only, the average number of hours spent in Flagstaff was 6.8 hours (median of 6.0 hours). See Table 21.

**Table 21. Average number of hours**

**Flagstaff Snowplay Survey - If a day trip only how many hours are you spending in Flagstaff?**

	Mean	Median
If day trip how many hours did you spend in Flagstaff?	6.8	6.0

For those visitors who spent the night, the average number of nights stayed in Flagstaff was 1.8 nights (median was one night). See Table 22.

**Table 22. Number of nights spent in Flagstaff**

**Flagstaff Snowplay Survey - If you are staying overnight  
how many nights are you spending in Flagstaff?**

	Mean	Median
If staying overnight how many nights did you spend in Flagstaff?	1.8	1.0

Those visitors who spent the night were asked to specify the type of lodging used. The vast majority – 88.8% – stayed in Hotels/Motels. Very few stayed in other types of overnight lodging: 5.0% in vacation rentals, 4.2% in the homes of family or friends; and very small percentages in B & Bs, RV parks or some other lodging type. See Table 23.

**Table 23. Type of overnight lodging**

**Flagstaff Snowplay Survey - What type of overnight lodging  
are you staying in on this trip?**

	Count	Column N %
Hotel-Motel	213	88.8%
Vacation Rental (condo or timeshare)	12	5.0%
Home of friends or family	10	4.2%
Bed & Breakfast	2	.8%
Campground or RV park	2	.8%
Other	2	.8%
Total	240	100.0%

In the above responses, the two parties who stayed in some “other” lodging elaborated: one stayed in a dorm at NAU; another stayed somewhere in the national forest. See Table 24.



**Table 24. Other overnight lodging**

**Flagstaff Snowplay Survey - Other place you stayed?**

	Count	Column N %
NO OTHER PLACE STAYED	448	99.6%
DORM AT NAU	1	.2%
NAT'L FOREST	1	.2%
Total	450	100.0%

Respondents who spent the night were asked to indicate the average nightly room rate of the lodging where they stayed in Flagstaff. On average, snowplay visitors spent \$87/night for lodging. (Note: The \$87 is a weighted average given that choice fields were offered as ranges.) See Table 25.

**Table 25. Average nightly room rate**

**Flagstaff Snowplay Survey - What is the average nightly room rate of the lodging where you are staying in Flagstaff?**

	Count	Column N %
Under \$50-night	29	12.6%
\$50-\$75-night	68	29.4%
\$76-\$100-night	56	24.2%
\$101 - \$125 - night	33	14.3%
\$126 - \$150 - night	15	6.5%
Over \$150 - night	16	6.9%
Don't know or not sure yet	14	6.1%
Total	231	100.0%

**Average room rate = \$87**

In order to be able to determine the economic impact of snowplay visits on Flagstaff, survey respondents were also asked to specify the amount of money the travel party spent per day in Flagstaff in a number of areas: Lodging, Restaurants/bars, Groceries, Transportation, Shopping, Recreation/entrance fees, and any “Other” expenses.

As shown in Table 26, these expenditures are presented as both mean and median values. The final column, titled “Valid N,” represents the number of respondents, out of the total of 450, who reported expenditures in that category. For example, 381 of 450 respondents reported expenditures in the restaurant/bar category, 357 in the transportation/gas category, and so on. Very few (26) reported any “other” expenditures. Also, the first line of the table shows the average number of people that these expenditures covered, which was 5.5 people/party (median of 4 people/party).

Average (mean) expenditures reported were: Lodging (\$125), Restaurant/Bar (\$89), Groceries (\$38), Transportation (\$55), Shopping (\$61), and Recreation/Entrance fees (\$14), and Other (\$152). See Table 26.

**Table 26. Travel party expenses**

	Mean	Median	Valid N
Tell us the number of people these expenses cover?	5.5	4.0	403
Lodging-Camping	\$124.6	\$100.0	205
Restaurant & Bar	\$89.2	\$70.0	381
Groceries	\$38.4	\$30.0	140
Transportation (including gas)	\$54.7	\$45.0	357
Shopping-Gear-Clothing	\$61.1	\$40.0	225
Recreation-Entrance-Permit Fees	\$13.9	\$10.0	318
Other expenditures	\$152.3	\$115.0	26

Those in Table 26 who noted “other” expenditures, were asked to specify those expenses, and their responses are shown in Table 27. Again, expenses related to the Polar Express were the most notable, along with expenditures for skiing or movies. See Table 27.

**Table 27. Other Expenditures Defined**

**Flagstaff Snowplay Survey - Define other expenditures?**

	Count	Column N %
NO OTHER EXPENDITURES	432	96.0%
CANDLES (ARMADILLA WAXWORKS)	1	.2%
COLD MEDICATION	1	.2%
FOOD @ SNACK BAR	1	.2%
MEDICAL FACILITY	1	.2%
MISCELLANEOUS	1	.2%
MOVIES	2	.4%
POLAR EXPRESS	6	1.3%
POLAR EXPRESS PACKAGE	1	.2%
SKIING	1	.2%
SKIING RENTAL	1	.2%
SLED/SNOWBOARD	1	.2%
SLEDS	1	.2%
Total	450	100.0%

Respondents were next asked to specify any other attractions or events they planned to see or engage in while on their visit to Flagstaff. As shown in Table 28 below, the most common of these were: Shopping (33.2%), Historic Downtown Flagstaff (32.3%), and Arizona Snowbowl (29.3%). In the case of Snowbowl, it is not clear whether they were skiing or just seeing the sights. Another quarter of respondents (24.6%) noted some “other” event or attraction not on our list, and these will be discussed below. The only other attractions mentioned by more than 10% of respondents were visits to Grand Canyon National Park (11.6%) and Lowell Observatory (10.8%). See the complete list in Table 28.

**Table 28. Other Attractions and Events**

**Flagstaff Snowplay Survey - While staying in Flagstaff what other attractions or events do you plan to see?**

	Count	Column N %
Shopping	77	33.2%
Downtown Flagstaff (Heritage Square)	75	32.3%
Arizona Snowbowl	68	29.3%
Other attraction	57	24.6%
Grand Canyon National Park	27	11.6%
Lowell Observatory	25	10.8%
Museum of Northern Arizona	21	9.1%
Don't know	20	8.6%
Events at Northern Arizona University	7	3.0%
Flagstaff Nordic Center	5	2.2%
Riordan Mansion State Historic Park	4	1.7%
Flagstaff Winterfest	3	1.3%
Pine Cone Drop (New Years)	2	.9%
Sunset Crater Volcano National Monument	2	.9%
Coconino Center for the Arts	1	.4%
Walnut Canyon National Monument	0	.0%
Wupatki National Monument	0	.0%
Total	232	100.0%

The quarter (24.6%) of respondents above who said they visited some “other” attraction were asked to specify those attractions. The most notable of these were: the Polar Express, movies, NAU-related events, and visits to Sedona. Some of the non-fee visitors at dispersed snowplay areas also noted they visited the pay-to-play site at Wing Mountain. See Table 29.

**Table 29. Other attractions visited**

**Flagstaff Snowplay Survey - Other Attractions**

	Count	Column N %
NO OTHER ATTRACTIONS DEFINED	397	88.2%
BUSTERS	1	.2%
DEER FARM	1	.2%
GAP	1	.2%
GRANNYS CLOSET	1	.2%
LITE PARADE	2	.4%
METEOR CRATER & MONTEZUMA CASTLE NM	1	.2%
MONTEZUMA'S CASTLE	2	.4%
MORMON LAKE	1	.2%
MOVIES	3	.7%
NAU	4	.9%
NAU/POLAR EXPRESS	1	.2%
PIONEER MUSEUM	1	.2%
POLAR EXPRESS	11	2.4%
POLAR EXPRESS, DOWNTOWN WILLIAMS	1	.2%
POW WOW AT HIGH SCHOOL	1	.2%
PX, B OF A	1	.2%
RANDOM	1	.2%
SEDONA	5	1.1%
TRAIN WILLIAMS	1	.2%
VISITOR CENTER	2	.4%
WALKER LAKE	1	.2%
WILLIAMS	1	.2%
WING MOUNTAIN	8	1.8%
WINSLOW	1	.2%
Total	450	100.0%

## SURVEY FINDINGS: Chapter Two

### Comparison of Fee and Non-Fee Snowplay Areas

Chapter Two of this report compares the fee area of Wing Mountain with the non-fee snowplay areas at which surveys were also collected – Crowley Pit, Peak View, and Fort Tuthill. These non-fee areas do offer plowed parking lots, but unlike Wing Mountain, none offers concessions (e.g., serving refreshments, selling sleds and supplies) or other amenities. Table 30 below compares weather conditions at fee and non-fee areas at the time the surveys were collected.

**Table 30. Weather Conditions**

**Flagstaff Snowplay Survey - Site Comparisons - Weather Conditions**

	Wing Mountain vs Other Dispersed Forest Sites			
	Wing Mountain Snowplay Area		Dispersed Snowplay on US Forest Service Lands	
	Count	Column N %	Count	Column N %
Sunny-Clear	203	63.4%	74	56.9%
Overcast	85	26.6%	30	23.1%
Snowing-Precipitation	32	10.0%	26	20.0%
Total	320	100.0%	130	100.0%

The next table shows the dates and locations at which surveys were collected, and in most cases surveys were collected at these two types of sites on different days. December and January surveys were collected almost entirely at Wing Mountain, whereas collection at the dispersed snowplay sites was accomplished largely in February and March. See Table 31.

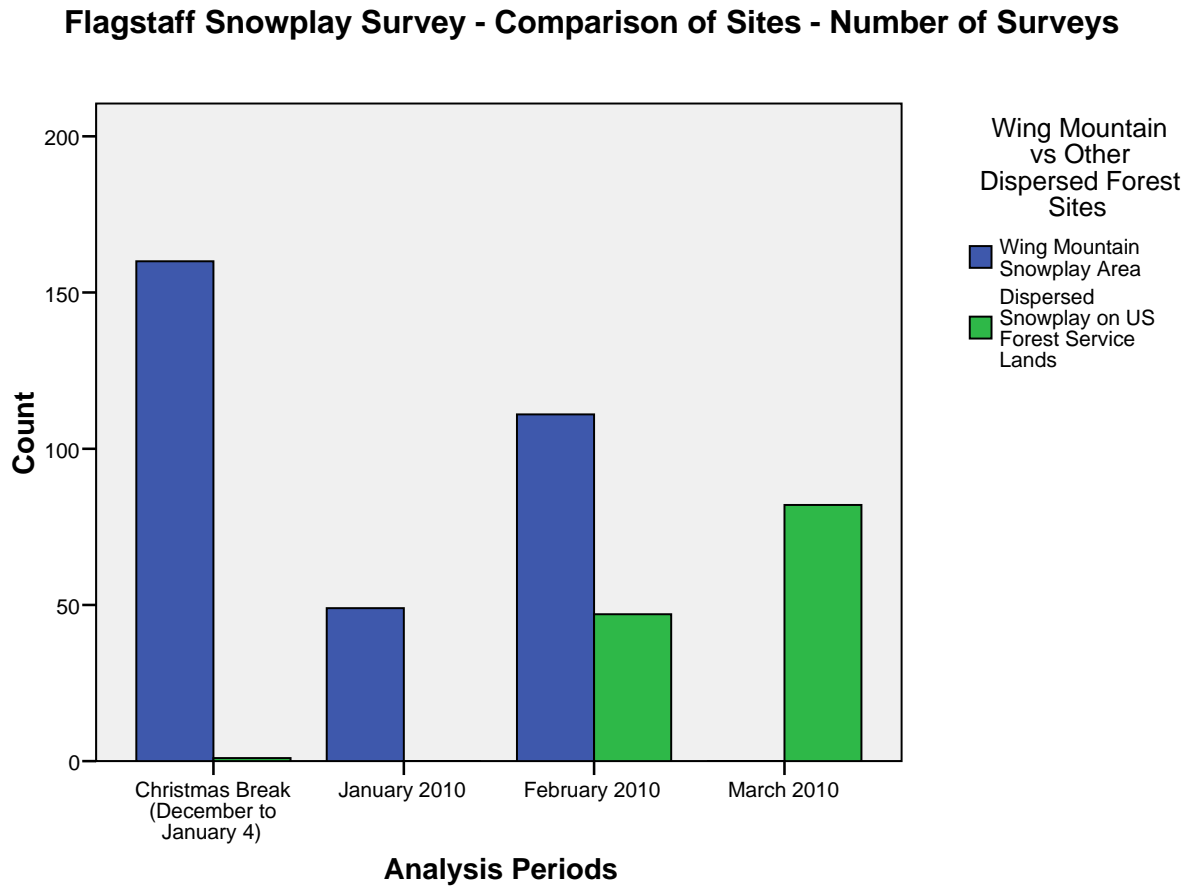
**Table 31. Comparison: Dates of Survey**

**Flagstaff Snowplay Survey - Site Comparisons - Actual Date of Survey**

	Wing Mountain vs Other Dispersed Forest Sites			
	Wing Mountain Managed snowplay recreation area		Dispersed recreation sites on US Forest lands	
	Count	Column N %	Count	Column N %
12/12/2009	27	8.5%	0	.0%
12/13/2009	11	3.4%	1	.8%
12/18/2009	20	6.3%	5	3.9%
12/19/2009	20	6.3%	0	.0%
12/20/2009	25	7.8%	2	1.6%
12/27/2009	27	8.5%	0	.0%
12/28/2009	18	5.6%	5	3.9%
01/30/2010	31	9.7%	0	.0%
01/31/2010	17	5.3%	0	.0%
02/07/2010	10	3.1%	5	3.9%
02/11/2010	7	2.2%	0	.0%
02/14/2010	30	9.4%	0	.0%
02/15/2010	15	4.7%	2	1.6%
02/20/2010	0	.0%	3	2.3%
02/21/2010	21	6.6%	21	16.3%
02/26/2010	4	1.3%	3	2.3%
02/27/2010	0	.0%	26	20.2%
02/28/2010	0	.0%	10	7.8%
03/06/2010	36	11.3%	9	7.0%
03/14/2010	0	.0%	18	14.0%
03/19/2010	0	.0%	19	14.7%
Total	319	100.0%	129	100.0%

This different pattern of survey collection at the two types of sites is displayed graphically in Figure 2.

Figure 2. Comparison: Number of Surveys



In summary, 100% of fee-pay surveys were collected at Wing Mountain, while the percentage breakdown at the non-fee sites was: Crowley Pit (54.3%), Peak View (28.7%), and Fort Tuthill (16.3%). See Table 32.



**Table 32. Comparison: Location of surveys**

**Flagstaff Snowplay Survey - Site Comparisons - Location of the surveys**

	Wing Mountain vs Other Dispersed Forest Sites			
	Wing Mountain Snowplay Area		Dispersed Snowplay on US Forest Service Lands	
	Count	Column N %	Count	Column N %
Wing Mountain	319	100.0%	0	.0%
Flagstaff Nordic Center	0	.0%	0	.0%
Crowley Pit (Hwy 180)	0	.0%	70	54.3%
Walker lake (Hwy 180)	0	.0%	1	.8%
Fort Tuthill	0	.0%	21	16.3%
Peak View	0	.0%	37	28.7%
Total	319	100.0%	129	100.0%

Did any differences appear in the gender of visitors at the fee and non-fee sites? As shown in Table 33 below, the gender of participants at both types of sites varied little. Slightly more women than men were found at the non-fee sites than at fee sites, but these differences were not significant.

**Table 33. Comparison: Gender of participants**

**Flagstaff Snowplay Survey - Site Comparisons - Gender of participants**

	Wing Mountain vs Other Dispersed Forest Sites			
	Wing Mountain Snowplay Area		Dispersed Snowplay on US Forest Service Lands	
	Count	Column N %	Count	Column N %
Male	156	50.8%	59	47.6%
Female	151	49.2%	65	52.4%
Total	307	100.0%	124	100.0%

Visitor origins at the two types of sites varied only slightly. At both fee and non-fee sites, the overwhelming majority of visitors were from out-of-town – 96.5% for Wing Mountain and 96.1% for the non-fee sites. Very few respondents were local – less than four percent for both fee and non-fee sites. See Table 34.

**Table 34. Comparison: Out-of-town vs. Local**

**Flagstaff Snowplay Survey - Site Comparisons - Are you from the Flagstaff area (within 50 miles of Flagstaff, including Parks, Williams or Winslow) or do you own a second home in Flagstaff?**

		Wing Mountain vs Other Dispersed Forest Sites			
		Wing Mountain Snowplay Area		Dispersed Snowplay on US Forest Service Lands	
		Count	Column N %	Count	Column N %
Are you from the Flagstaff area (within 50 miles of Flagstaff, including Parks, Williams or Winslow) or do you own a second home in Flagstaff?	Yes	11	3.5%	5	3.9%
	No	303	96.5%	122	96.1%
	Total	314	100.0%	127	100.0%

Again, as with the previous comparisons, the numbers of adults and children in visitor parties exhibited few differences between the fee and non-fee sites; the medians for both types were two adults and two children and the means showed little difference as well. See Table 35.

**Table 35. Comparison: Adults & Children in party**

**Flagstaff Snowplay Survey - Site Comparisons - Including yourself how many adults (over 18 years) and children are in your party?**

	Wing Mountain vs Other Dispersed Forest Sites			
	Wing Mountain Snowplay Area		Dispersed Snowplay on US Forest Service Lands	
	Mean	Median	Mean	Median
Including yourself how many adults 18 years and older are in your party today?	2.9	2.0	2.9	2.0
How many children under 18 years and younger are in your party today?	3.1	2.0	3.0	2.0

Were any notable differences found in travel party composition between fee and non-fee sites? Once again, differences between the two were minimal. About two-thirds of those at both site types traveled in parties of “Family only,” with about three-in-ten of additional parties made up of “Families and friends.” Other minor differences reported were not significant. See Tables 36 and 37.

**Table 36. Comparison: Party Type**

**Flagstaff Snowplay Survey - Site Comparisons - What type of party are you snowplaying with?**

	Wing Mountain vs Other Dispersed Forest Sites			
	Wing Mountain Snowplay Area		Dispersed Snowplay on US Forest Service Lands	
	Count	Column N %	Count	Column N %
Family only	206	64.4%	88	67.7%
Family and Friends	102	31.9%	36	27.7%
Friends only	16	5.0%	5	3.8%
Organized group (club church tour group etc)	4	1.3%	1	.8%
Other	1	.3%	1	.8%
People I work with	0	.0%	1	.8%
Total	320	100.0%	130	100.0%

**Table 37. Comparison: “Other” party type**

**Flagstaff Snowplay Survey - Site Comparisons - Other party type you are snowplaying with?**

	Wing Mountain vs Other Dispersed Forest Sites			
	Wing Mountain Snowplay Area		Dispersed Snowplay on US Forest Service Lands	
	Count	Column N %	Count	Column N %
OTHER PARTY TYPE	320	100.0%	129	99.2%
SCHOOL GROUP	0	.0%	1	.8%
Total	320	100.0%	130	100.0%

In terms of respondent age, the comparison of fee and non-fee sites showed that the average ages of both groups were almost identical – 38.2 years for Wing Mountain and 37.3 years for dispersed non-fee areas. See Table 38.

**Table 38. Comparison: Average age**

**Flagstaff Snowplay Survey - Site Comparisons - Age of participant**

	Wing Mountain vs Other Dispersed Forest Sites			
	Wing Mountain Snowplay Area		Dispersed Snowplay on US Forest Service Lands	
	Count	Column N %	Count	Column N %
18-29 years	60	18.8%	30	23.3%
30-39 years	122	38.2%	48	37.2%
40-49 years	98	30.7%	35	27.1%
50-59 years	23	7.2%	11	8.5%
60-69 years	12	3.8%	4	3.1%
70-79 years	1	.3%	0	.0%
80 plus years	0	.0%	0	.0%
Refused	3	.9%	1	.8%
Total	319	100.0%	129	100.0%

Average Ages:

	Wing Mountain Snowplay Area	Dispersed Snowplay on US Forest Service Lands
Age (years)	38.2	37.3

The comparison of average annual income produced the first significant difference between visitors at fee and non-fee snowplay sites. As shown in Table 39, visitors at the Wing Mountain fee site had an average annual income of \$84,112, compared to an average annual income of \$67,628 for those respondents at the non-fee sites. This appears to suggest that those with lower incomes were seeking to save money by engaging in snowplay at non-fee sites. See Table 39.

**Table 39. Comparison: Annual household income**

**Flagstaff Snowplay Survey - Site Comparisons - Annual household income before taxes?**

	Wing Mountain vs Other Dispersed Forest Sites			
	Wing Mountain Managed snowplay recreation area		Dispersed recreation sites on US Forest lands	
	Count	Column N %	Count	Column N %
Under \$25,000	13	4.1%	17	13.5%
\$25,000 - \$49,999	42	13.2%	25	19.8%
\$50,000 - \$74,999	67	21.1%	32	25.4%
\$75,000 - \$99,999	48	15.1%	20	15.9%
\$100,000 - \$124,999	46	14.5%	14	11.1%
\$125,000 - \$149,999	23	7.3%	3	2.4%
Over \$150,000	22	6.9%	5	4.0%
Refused	56	17.7%	10	7.9%

	Wing Mountain Snowplay Area	Dispersed Snowplay
Annual Income	\$84,112	\$67,628

In the area of information sources used, another significant difference appeared in the ways visitors heard about the fee and non-fee sites. Those at the non-fee dispersed sites were twice as likely as those at Wing Mountain to have heard about these areas from some “other” source, which mostly included previous visits or information from local businesses that directed them to the free sites. These sources were followed by information from websites/online and from friends and family. On the other hand, visitors to Wing Mountain were most likely to have heard about this fee site from a website or online, followed by some “other” source, such as word-of-mouth or friends and family. Table 40 lists overall information sources and Table 41 lists the responses to “Other” sources.

**Table 40. Comparison: Information Source**

**Flagstaff Snowplay Survey - Site Comparisons - Where did you hear about or get information on Flagstaff's snowplay areas?**

	Wing Mountain vs Other Dispersed Forest Sites			
	Wing Mountain Managed snowplay recreation area		Dispersed recreation sites on US Forest lands	
	Count	Column N %	Count	Column N %
Family & Friends?	83	28.7%	28	23.3%
Radio-TV?	1	.3%	0	.0%
Newspaper-Magazine?	1	.3%	0	.0%
Website-Online?	118	40.8%	33	27.5%
Visitor Center or Government Office?	6	2.1%	3	2.5%
Other source	98	33.9%	78	65.0%
Total	289	100.0%	120	100.0%

**Table 41. Comparison: Other Information sources**

	Wing Mountain	Wing Mountain	Dispersed Snowplay	Dispersed Snowplay
Flagstaff Snowplay Survey - Site Comparisons - Other information source about snowplay areas?	Count	Column N %	Count	Column N %
NO OTHER SOURCE OF SNOWPLAY INFORMATION	208	65.0	49	37.7
ALBERTSONS DELI COUNTER	1	0.3	0	0.0
AT WING MOUNTAIN & BEEN BEFORE	0	0.0	1	0.8
ATTENDED NAU	1	0.3	0	0.0
BEEN BEFORE-DRIVING BY	0	0.0	1	0.8
BEEN BEFORE	21	6.6	21	16.2
BEEN BEFORE AND LOCAL BUSINESS-GEAR/OUTFITTER STORE	0	0.0	1	0.8
BEEN BEFORE AND USED FACEBOOK SITE FOR FLAGSTAFF NORDIC CENTER	0	0.0	1	0.8
BEEN HERE BEFORE	5	1.6	0	0.0
BEEN HERE YEARS	0	0.0	1	0.8
BEEN OFTEN BEFORE	1	0.3	0	0.0
BOY SCOUTS	1	0.3	0	0.0
BROTHER	1	0.3	0	0.0
CAME HERE	1	0.3	0	0.0
CO	1	0.3	0	0.0
COME BEFORE	1	0.3	0	0.0
COME OFTEN	1	0.3	0	0.0
COMING FOR YEARS	1	0.3	0	0.0
CONCIERGE/FAIRFIELD	1	0.3	0	0.0
DIRTBIKES IN AREA	1	0.3	0	0.0
DISCOUNT TIRE	1	0.3	0	0.0
DRIVIN BY AND FOUND IT	0	0.0	1	0.8
DRIVING AROUND	1	0.3	0	0.0
DRIVING BY-FOLLOW OUR NOSES	0	0.0	1	0.8
DRIVING BY	1	0.3	9	6.9
DRIVING BY 10 YEARS AGO	1	0.3	0	0.0
DRIVING BY/FOUND BY ACCIDENT	1	0.3	0	0.0
DRIVING BY/SIGNS	1	0.3	0	0.0
DRIVING PAST & STOPPED	0	0.0	1	0.8
DROVE BY	2	0.6	0	0.0
DROVE BY YEARS AGO	1	0.3	0	0.0
FOUND FT TUTHILL WHILE DRIVING	0	0.0	1	0.8
FOUND IT	0	0.0	1	0.8
FOUND IT DRIVING BY	0	0.0	1	0.8
FOUND IT WHEN ARRIVED IN FLAGSTAFF	0	0.0	1	0.8

FOUND IT WHILE DRIVING	1	0.3	1	0.8
FOUND IT WHILE DRIVING 180	0	0.0	1	0.8
FOUND SITE TRAVELLING HWY 180	0	0.0	1	0.8
GALAXY DINER WAITRESS	1	0.3	0	0.0
GAS STATION	1	0.3	1	0.8
HEARD ABOUT IT/WORD-OF-MOUTH	1	0.3	0	0.0
HOTEL-LOCAL BUSINESS	0	0.0	1	0.8
HOTEL	6	1.9	1	0.8
HOTEL CONCIERGE	2	0.6	0	0.0
HOTEL FLYER	1	0.3	0	0.0
HOTEL MAP	0	0.0	1	0.8
HOUSE RENTAL	1	0.3	0	0.0
INFO IN RENTAL	1	0.3	0	0.0
JUST COME EVERY YEAR	1	0.3	0	0.0
JUST DROVE	0	0.0	1	0.8
KNEW ABOUT AREA	1	0.3	0	0.0
KNEW ABOUT IT-BEEN BEFORE	1	0.3	0	0.0
KNEW ABOUT IT	0	0.0	1	0.8
KNOW ABOUT AREA	0	0.0	1	0.8
LIVED HERE IN AREA A LONG TIME	1	0.3	0	0.0
LOCAL-KNEW ABOUT IT	0	0.0	1	0.8
LOCAL BUSINESS-GAS STATION	1	0.3	3	2.3
LOCAL BUSINESS-HOTEL	2	0.6	0	0.0
LOCAL BUSINESS-HOTEL AND FOLLOWING NORDIC CENTER ON FACEBOOK	0	0.0	1	0.8
LOCAL BUSINESS-SHELL STATION AT 180	1	0.3	0	0.0
LOCAL BUSINESS-STOPPED AND BEEN BEFORE	1	0.3	0	0.0
LOCAL BUSINESS	0	0.0	10	7.7
LOCAL INFO/CONVERSATION AT WING MOUNTAIN	0	0.0	1	0.8
MIKE & RHONDA'S	1	0.3	0	0.0
MOM	1	0.3	0	0.0
MOTEL	2	0.6	0	0.0
NATIVE AZ-KNEW ABOUT IT	0	0.0	1	0.8
NAU ALUMNI	0	0.0	1	0.8
PAMPHLET	0	0.0	1	0.8
PARK RANGER YEARS AGO	1	0.3	0	0.0
PART OF GROUP	1	0.3	0	0.0
PAST VISITS	1	0.3	0	0.0
PEACE SURPLUS	1	0.3	0	0.0
PHONE CALLING AROUND	1	0.3	0	0.0
PREVIOUS TRIP W/CUB SCOUTS	1	0.3	0	0.0
RACI THREADS	1	0.3	0	0.0



REFERRED	3	0.9	0	0.0
ROAD	0	0.0	1	0.8
ROAD SIGN	2	0.6	0	0.0
SAW AS DRIVING BY	1	0.3	0	0.0
SAW IT DRIVING BY	1	0.3	0	0.0
SAW ON THE DRIVE	0	0.0	1	0.8
SAW SIGNS/LOCAL BUSINESS	1	0.3	0	0.0
SAW WHEN DRIVING	0	0.0	1	0.8
SAW WHILE DRIVING	1	0.3	0	0.0
SIDE OF ROAD	0	0.0	1	0.8
SIGN BY ROAD	1	0.3	0	0.0
SIGN BY SNOWBOWL	1	0.3	0	0.0
SNOWBOARD	1	0.3	0	0.0
SNOWBOWL	2	0.6	1	0.8
SNOWBOWL GUEST SERVICES	0	0.0	1	0.8
SNOWBOWL MAP	1	0.3	0	0.0
SNOWBOWL RANGERS	1	0.3	0	0.0
SNOWBOWL SIGNS	1	0.3	0	0.0
SNOWBOWL/LITTLE KID	1	0.3	0	0.0
SNOWBOWL/NORDIC WEBSITE	1	0.3	0	0.0
SPORTING GOODS STORE	1	0.3	0	0.0
SUPER 8 MOTEL	1	0.3	0	0.0
THREADS	1	0.3	0	0.0
TRAVELLING THROUGH	0	0.0	1	0.8
TV NEWS	1	0.3	0	0.0
VISIT EVERY YEAR	1	0.3	0	0.0
VISITED	1	0.3	0	0.0
VISITED LAST YEAR	1	0.3	0	0.0
WIFE	1	0.3	0	0.0
WING MOUNTAIN	0	0.0	1	0.8
WM KIOSK	0	0.0	1	0.8
WOODY MOUNTAIN CAMPGROUND	0	0.0	1	0.8
WORD OF MOUTH	2	0.6	0	0.0
WORKED W/FOREST SVC	1	0.3	0	0.0
Total	320	100.0	130	100.0

Communities with significant tourism industries, such as Flagstaff, must be concerned with visitor satisfaction. The large percentage of repeat visitors to Wing Mountain – approximately two-thirds of total visitors – confirm that high satisfaction levels for snowplayers are being achieved.

Did any significant differences appear in visitor satisfaction levels between the fee and non-fee snowplay areas? Data show that satisfaction levels did not differ markedly. Visitors to Wing Mountain were slightly more satisfied than visitors to non-fee sites, especially in terms of ease of locating the site, signage and parking availability. In all, however, visitors at both types of sites were very satisfied with virtually all aspects of their visits. The overall level of satisfaction for Wing Mountain was 9.5 and for the non-fee dispersed snowplay sites was 9.4 (on a scale from one to 10 where 10 is high). See Tables 42 and 43.

**Table 42. Comparison: Levels of Satisfaction-Wing Mountain**

**Flagstaff Snowplay Survey - Site Comparisons - Tell us your level of satisfaction with the following:**

	Wing Mountain Snowplay Area										
	Low level of satisfaction	2	3	4	Neither low nor high level of satisfaction	6	7	8	9	High level of satisfaction	Mean
	Locating snow play areas & signage to areas	.3%	.7%	1.0%	.7%	2.6%	5.2%	7.9%	13.8%	15.4%	52.5%
Flagstaff area road conditions (taking into account the weather)	.7%	.7%	1.0%	1.3%	4.6%	4.3%	8.9%	14.8%	14.8%	49.0%	8.6
Traffic conditions in traveling to snow play areas	.0%	.3%	1.3%	3.0%	4.0%	3.0%	6.9%	16.2%	17.2%	48.2%	8.7
Parking availability & conditions at snow play area	.3%	.7%	.3%	1.0%	1.0%	1.0%	3.9%	12.2%	15.5%	64.1%	9.2
Your current snow play-sledding experience	.0%	.0%	.0%	.0%	2.7%	.7%	6.4%	6.4%	13.8%	70.0%	9.4
Your overall experience visiting Flagstaff on this trip	.0%	.0%	.0%	.0%	.7%	.0%	3.3%	7.3%	19.5%	69.3%	9.5

**Table 43. Comparison: Levels of Satisfaction-Dispersed Sites**

**Flagstaff Snowplay Survey - Site Comparisons - Tell us your level of satisfaction with the following:**

	Dispersed Snowplay on US Forest Service Lands										
	Low level of satisfaction	2	3	4	Neither low nor high level of satisfaction	6	7	8	9	High level of satisfaction	Mean
	Locating snow play areas & signage to areas	.0%	4.0%	2.4%	1.6%	9.6%	4.0%	9.6%	19.2%	12.8%	36.8%
Flagstaff area road conditions (taking into account the weather)	.0%	.0%	2.4%	2.4%	6.3%	3.2%	7.9%	19.0%	15.9%	42.9%	8.5
Traffic conditions in traveling to snow play areas	.0%	.0%	.8%	1.6%	4.0%	3.2%	5.6%	18.3%	18.3%	48.4%	8.8
Parking availability & conditions at snow play area	.8%	.0%	.8%	2.4%	4.8%	4.8%	10.3%	11.9%	15.1%	49.2%	8.6
Your current snow play-sledding experience	.0%	.9%	.0%	.9%	.9%	.0%	4.3%	13.7%	17.1%	62.4%	9.3
Your overall experience visiting Flagstaff on this trip	.0%	.0%	.0%	.8%	.8%	.0%	1.6%	11.9%	26.2%	58.7%	9.4

Comparisons of visitor origins produced few differences between the two types of sites; visitors at both were almost entirely from Arizona – 97% in both cases – with very few out-of-state visitors. See the results in Table 44.

**Table 44. Comparison: State of Origin**

**Flagstaff Snowplay Survey - Site Comparisons - What is the state of your permanent residence?**

	Wing Mountain vs Other Dispersed Forest Sites			
	Wing Mountain Snowplay Area		Dispersed Snowplay on US Forest Service Lands	
	Count	Column N %	Count	Column N %
Florida	1	.3%	1	.8%
South Dakota	1	.3%	0	.0%
Montana	1	.3%	0	.0%
Texas	2	.7%	1	.8%
Arizona	295	97.4%	121	97.6%
California	3	1.0%	1	.8%
Total	303	100.0%	124	100.0%

In both cases, if snowplay visitors were from Arizona, they were most likely to be from Phoenix, although a significantly larger percentage of snowplay parties at non-fee sites were from Phoenix proper as opposed to the suburbs – 27.4% at Wing Mountain were from Phoenix vs. 39.5% from Phoenix at the non-fee sites. Nevertheless, the top two contributing communities for both types of sites were Phoenix and Mesa. See Table 45.

**Table 45. Comparison: Arizona City of residence**

**Flagstaff Snowplay Survey - Site Comparisons - What is the Arizona city of your permanent residence?**

	Wing Mountain vs Other Dispersed Forest Sites	
	Wing Mountain Snowplay Area	Dispersed Snowplay on US Forest Service Lands
	Column N %	Column N %
ANTHEM - DESERT HILLS	2.1%	3.5%
AVONDALE	.7%	2.6%
BUCKEYE	1.8%	.9%
BULLHEAD CITY	.0%	.9%
CATALINA	.4%	.0%
CAVE CREEK	.4%	.9%
CHANDLER	7.5%	4.4%
COOLIDGE	.4%	.0%
CORONA DE TUCSON - VAIL	.4%	.0%
CORONADO	.0%	.9%
COTTONWOOD	.4%	.9%
DEWEY	.4%	.0%
EL MIRAGE	.4%	2.6%
FLAGSTAFF	.4%	.0%
FORT LOWELL	.4%	.0%
GILBERT	6.4%	2.6%
GLENDALE	8.5%	5.3%
GOODYEAR	1.4%	1.8%
GOODYEAR	.7%	.0%
GUADALUPE	1.8%	.9%
HEREFORD	.0%	.9%
HIGLEY	.7%	.0%
LAVEEN	.4%	.9%
LITCHFIELD PARK	1.1%	.9%
MESA	8.5%	7.0%
NEW RIVER	.7%	.0%
ORO VALLEY	1.1%	.9%
PEORIA	6.4%	6.1%
PHOENIX	27.4%	39.5%
POMERENE	.0%	.9%
POSTON	.0%	.9%
PRESCOTT VALLEY	.4%	.9%
SADDLEBROOKE	.4%	.0%
SAHUARITA	.4%	.0%
SCOTTSDALE	8.2%	4.4%
SIERRA VISTA	.0%	.9%
SUN CITY	1.8%	2.6%
SUN LAKES	1.4%	.0%
SURPRISE	2.5%	.9%
TEMPE	.7%	1.8%
TOLLESON	1.4%	.9%
TUCSON	1.1%	1.8%
WADDELL	.4%	.0%
WITTMANN	.4%	.0%
YOUNGTOWN	.4%	.0%
YUMA	.4%	.0%
Total	100.0%	100.0%

For both types of sites, the primary reason for the visit was overwhelmingly for snowplay – 87% in the case of Wing Mountain and 84% for the non-fee dispersed areas. See Table 46.

**Table 46. Comparison: Primary Reason for visit**

**Flagstaff Snowplay Survey - Site Comparisons - Is snowplay in Flagstaff the primary reason for this visit?**

	Wing Mountain vs Other Dispersed Forest Sites			
	Wing Mountain Snowplay Area		Dispersed Snowplay on US Forest Service Lands	
	Count	Column N %	Count	Column N %
Yes	264	86.8%	105	84.0%
No	40	13.2%	20	16.0%
Total	304	100.0%	125	100.0%

The minority of respondents who said that snowplay was *not* the primary reason for the visit, were then asked to specify the reason for the visit. As shown in Table 47, an excursion on the Polar Express was the most likely other reason for the visit by those at Wing Mountain. For those at the non-fee areas, no single other purpose stood out, although NAU-related reasons were common as were skiing-related reasons. See Table 47.

**Table 47. Primary Reason for Visit Defined**

**Flagstaff Snowplay Survey - Site Comparisons - If No what is the primary reason for this visit?**

	Wing Mountain vs Other Dispersed Forest Sites			
	Wing Mountain Snowplay Area		Dispersed Snowplay on US Forest Service Lands	
	Count	Column N %	Count	Column N %
NO OTHER PRIMARY REASON GIVEN	290	90.6%	111	85.4%
ASSOCIATION MEETING	1	.3%	0	.0%
AUDITION FOR NAU-MUSIC PROGRAM	0	.0%	1	.8%
BUSINESS	1	.3%	0	.0%
DAY TRIP TO FLAGSTAFF FROM PHOENIX FOR LEISURE	0	.0%	1	.8%
ESCAPE FROM STRESS	1	.3%	0	.0%
FAMILY	1	.3%	0	.0%
GRADUATION	2	.6%	0	.0%
GRAND CANYON	1	.3%	1	.8%
GRAND CANYON NP	0	.0%	1	.8%
HOLIDAYS	1	.3%	0	.0%
JUST TO GET OUT OF PHOENIX	0	.0%	1	.8%
JUST VISITING	1	.3%	0	.0%
LEISURE TRAVEL GENERALLY	0	.0%	1	.8%
NAU JAZZ FESTIVAL (FAMILY MEMBER WAS PARTICIPATING)	1	.3%	0	.0%
POLAR EXPRESS	16	5.0%	0	.0%
PRE-PENSION HOLIDAY	1	.3%	0	.0%
SKIING	0	.0%	1	.8%
SKIING AT SNOWBOWL	0	.0%	1	.8%
SKIING/SIGHTSEEING	0	.0%	1	.8%
SNOWBOARDING	0	.0%	3	2.3%
SNOWBOARDING/SKIING	0	.0%	1	.8%
SPRING BREAK	0	.0%	1	.8%
TO VISIT GRAND CANYON	0	.0%	1	.8%
TRAIN RIDE	1	.3%	0	.0%
VACATION-SPRING BREAK	0	.0%	1	.8%
VACATION	1	.3%	0	.0%
VISIT UNIVERSITY	1	.3%	0	.0%
VISITING STUDENT AT NAU	0	.0%	1	.8%
WEEKEND VISIT GENERALLY-FROM PHOENIX AREA	0	.0%	1	.8%
WINSLOW AZ	0	.0%	1	.8%
Total	320	100.0%	130	100.0%



Few differences appeared when respondents at both fee and non-fee areas were asked if this was their first visit to Flagstaff for snowplay; in both cases two-thirds of visitors indicated that they had been to Flagstaff previously for snowplay. See Table 48.

**Table 48. Comparison: First Visit to Flagstaff for snowplay**

**Flagstaff Snowplay Survey - Site Comparisons - Is this your first visit to Flagstaff that includes snowplay?**

	Wing Mountain vs Other Dispersed Forest Sites			
	Wing Mountain Snowplay Area		Dispersed Snowplay on US Forest Service Lands	
	Count	Column N %	Count	Column N %
Yes	101	34.0%	39	31.2%
No	196	66.0%	86	68.8%
Total	297	100.0%	125	100.0%

When asked how often they come to Flagstaff in the winter for snowplay, respondents at both fee and non-fee areas averaged two trips per year. See Table 49.

**Table 49. Comparison: Number of visits in typical winter**

**Flagstaff Snowplay Survey - Site Comparisons - If no how often do you typically come to Flagstaff in the winter for snowplay?**

	Wing Mountain vs Other Dispersed Forest Sites			
	Wing Mountain Snowplay Area		Dispersed Snowplay on US Forest Service Lands	
	Mean	Median	Mean	Median
If No how often do you typically come to Flagstaff in the winter season for snow play?	1.9	2.0	1.8	2.0

Both sets of visitors also responded that they had visited Flagstaff twice in the past year – and these appear to correspond to the two visits per year that they come for snowplay. A challenge for the Flagstaff CVB would be to get these same visitors to return at other times of the year to engage in additional sorts of family activities. See Table 50.

**Table 50. Comparison: Number of visits in last 12 months**

**Flagstaff Snowplay Survey - Site Comparisons - How many times have you visited Flagstaff in the past 12 months?**

	Wing Mountain vs Other Dispersed Forest Sites			
	Wing Mountain Snowplay Area		Dispersed Snowplay on US Forest Service Lands	
	Mean	Median	Mean	Median
How many times have you visited Flagstaff in the past 12 months?	2.6	2.0	2.4	2.0

The percentages of visitors who were on day vs. overnight trips were also almost identical between the two groups, as shown in Table 50, suggesting that visitors to non-fee snowplay areas were equally willing to spend the night in Flagstaff. See Table 51.

**Table 51. Comparison: Total time spent in Flagstaff**

**Flagstaff Snowplay Survey - Site Comparisons - How much time in total will you spend in Flagstaff on this trip?**

	Wing Mountain vs Other Dispersed Forest Sites			
	Wing Mountain Snowplay Area		Dispersed Snowplay on US Forest Service Lands	
	Count	Column N %	Count	Column N %
Day trip only	134	44.7%	55	45.5%
Overnight trip	166	55.3%	66	54.5%
Total	300	100.0%	121	100.0%

The same was true for the average number of hours spent by the two types of visitors – six hours on average for those at both fee and non-fee snowplay areas. See Table 52.

**Table 52. Comparison: Number of hours spent in Flagstaff**

**Flagstaff Snowplay Survey - Site Comparisons - If a day trip only how many hours are you spending in Flagstaff?**

	Wing Mountain vs Other Dispersed Forest Sites			
	Wing Mountain Snowplay Area		Dispersed Snowplay on US Forest Service Lands	
	Mean	Median	Mean	Median
If day trip how many hours did you spend in Flagstaff?	6.9	6.0	6.5	6.0

An interesting finding appeared in the comparison of the number of nights spent in Flagstaff. Visitors at Wing Mountain spent an average of 1.9 nights and a median of one night, while visitors at non-fee areas spent an average of 1.6 nights but a median of two nights. (This may seem curious, but a recheck of the data confirmed that the median stay of two nights for non-fee visitors and one night for Wing Mountain visitors was correct.) See Table 53.

**Table 53. Comparison: Number of overnights spent in Flagstaff**

**Flagstaff Snowplay Survey - Site Comparisons - If you are staying overnight how many nights are you spending in Flagstaff?**

	Wing Mountain vs Other Dispersed Forest Sites			
	Wing Mountain Snowplay Area		Dispersed Snowplay on US Forest Service Lands	
	Mean	Median	Mean	Median
If staying overnight how many nights did you spend in Flagstaff?	1.9	1.0	1.6	2.0

Dispersed snowplay visitors at non-fee areas were also slightly more likely to stay in paid lodging than were fee-paying visitors, while those who paid for the Wing Mountain experience were slightly more likely to stay in a vacation condo/timeshare (6.4%) or stay in the homes of friends and family (5.8%). See Table 54.

**Table 54. Comparison: Type of overnight lodging**

**Flagstaff Snowplay Survey - Site Comparisons - What type of overnight lodging are you staying in on this trip?**

	Wing Mountain vs Other Dispersed Forest Sites			
	Wing Mountain Snowplay Area		Dispersed Snowplay on US Forest Service Lands	
	Count	Column N %	Count	Column N %
Hotel-Motel	148	86.5%	65	94.2%
Vacation Rental (condo or timeshare)	11	6.4%	1	1.4%
Home of friends or family	10	5.8%	0	.0%
Bed & Breakfast	0	.0%	2	2.9%
Campground or RV park	1	.6%	1	1.4%
Other	1	.6%	1	1.4%
Total	171	100.0%	69	100.0%

Few visitors of either type stayed in “other” types of overnight lodging – one stayed in an NAU dorm and one overnighted in the national forest. See Table 55.

**Table 55. Comparison: Other lodging used**

**Flagstaff Snowplay Survey - Site Comparisons - Other place you stayed?**

	Wing Mountain vs Other Dispersed Forest Sites			
	Wing Mountain Snowplay Area		Dispersed Snowplay on US Forest Service Lands	
	Count	Column N %	Count	Column N %
NO OTHER PLACE STAYED	319	99.7%	129	99.2%
DORM AT NAU	0	.0%	1	.8%
NAT'L FOREST	1	.3%	0	.0%
Total	320	100.0%	130	100.0%

Some slight differences appeared between the two groups on average per-party per-day spending, such as nightly room rates. As might be expected, nightly room rates for those at non-fee dispersed sites averaged less than those for visitors to the pay site - \$90/night for those at the pay site vs. \$81 for those at the non-pay sites. See Table 56.

**Table 56: Comparison: Average nightly room rate**

**Flagstaff Snowplay Survey - Site Comparisons - What is the average nightly room rate of the lodging where you are staying in Flagstaff?**

	Wing Mountain vs Other Dispersed Forest Sites			
	Wing Mountain Managed snowplay recreation area		Dispersed recreation sites on US Forest lands	
	Count	Column N %	Count	Column N %
Under \$50-night	19	11.4%	10	15.6%
\$50-\$75-night	41	24.7%	26	40.6%
\$76-\$100-night	43	25.9%	13	20.3%
\$101 - \$125 - night	27	16.3%	6	9.4%
\$126 - \$150 - night	11	6.6%	4	6.3%
Over \$150 - night	12	7.2%	4	6.3%
Don't know or not sure yet	13	7.8%	1	1.6%
Total	166	100.0%	64	100.0%

	Wing Mountain Snowplay Area	Dispersed Snowplay
Room Rate	\$89.60	\$80.80

In terms of other expenditures, Wing Mountain visitors spent more on lodging, groceries and in restaurant/bars. However, those at dispersed areas spent more on shopping/gear/clothing. See Table 57.

**Table 57. Comparison: Travel party spending per day**

**Flagstaff Snowplay Survey - Site Comparisons - Please estimate as closely as possible the amount your travel party is spending per day in Flagstaff for the following:**

	Wing Mountain vs Other Dispersed Forest Sites			
	Wing Mountain Managed snowplay recreation area		Dispersed recreation sites on US Forest lands	
	Mean	Median	Mean	Median
Tell us the number of people these expenses cover?	6	5	5	4
Lodging-Camping	\$130	\$100	\$111	\$95
Restaurant & Bar	\$95	\$75	\$74	\$60
Groceries	\$43	\$30	\$29	\$23
Transportation (including gas)	\$56	\$50	\$49	\$40
Shopping-Gear-Clothing	\$57	\$50	\$66	\$40
Recreation-Entrance-Permit Fees	\$14	\$10	\$28	\$10
Other expenditures	\$82	\$28	\$45	\$27

Few parties of either type provided any “other” expenditures – the most notable of these was the Wing Mountain visitors who went to the Polar Express. See Table 58.

**Table 58. Comparison: Other expenditures**

**Flagstaff Snowplay Survey - Site Comparisons - Define other expenditures?**

	Wing Mountain vs Other Dispersed Forest Sites			
	Wing Mountain Snowplay Area		Dispersed Snowplay on US Forest Service Lands	
	Count	Column N %	Count	Column N %
NO OTHER EXPENDITURES DEFINED	305	95.3%	127	97.7%
CANDLES (ARMADILLA WAXWORKS)	1	.3%	0	.0%
COLD MEDICATION	0	.0%	1	.8%
FOOD @ SNACK BAR	1	.3%	0	.0%
MEDICAL FACILITY	0	.0%	1	.8%
MISCELLANEOUS	1	.3%	0	.0%
MOVIES	2	.6%	0	.0%
POLAR EXPRESS	6	1.9%	0	.0%
POLAR EXPRESS PACKAGE	1	.3%	0	.0%
SKIING	1	.3%	0	.0%
SKIING RENTAL	1	.3%	0	.0%
SLED/SNOWBOARD	0	.0%	1	.8%
SLEDS	1	.3%	0	.0%
Total	320	100.0%	130	100.0%

Interestingly, those who were at non-fee snowplay areas were considerably more likely to engage in shopping in Flagstaff – 53.8% for non-fee areas vs. 19.9% for Wing Mountain. They were also more likely to visit downtown Flagstaff and Arizona Snowbowl. On the other hand, those who went to Wing Mountain were slightly more likely to visit Lowell Observatory, the Museum of Northern Arizona and the Grand Canyon. See Table 59.

**Table 59. Comparison: Other attractions or events you plan to see**

**Flagstaff Snowplay Survey - Site Comparisons - While staying in Flagstaff what other attractions or events do you plan to see?**

	Wing Mountain vs Other Dispersed Forest Sites			
	Wing Mountain Snowplay Area		Dispersed Snowplay on US Forest Service Lands	
	Count	Column N %	Count	Column N %
Shopping	28	19.9%	49	53.8%
Downtown Flagstaff (Heritage Square)	41	29.1%	34	37.4%
Arizona Snowbowl	32	22.7%	36	39.6%
Other attraction	37	26.2%	20	22.0%
Grand Canyon National Park	19	13.5%	8	8.8%
Lowell Observatory	21	14.9%	4	4.4%
Museum of Northern Arizona	15	10.6%	6	6.6%
Don't know	19	13.5%	1	1.1%
Events at Northern Arizona University	3	2.1%	4	4.4%
Flagstaff Nordic Center	1	.7%	4	4.4%
Riordan Mansion State Historic Park	3	2.1%	1	1.1%
Flagstaff Winterfest	1	.7%	2	2.2%
Pine Cone Drop (New Years)	1	.7%	1	1.1%
Sunset Crater Volcano National Monument	1	.7%	1	1.1%
Coconino Center for the Arts	0	.0%	1	1.1%
Total	141	100.0%	91	100.0%

The only “other” attraction of significance was the mention of visits to the Grand Canyon Railway’s Polar Express by those who also went to Wing Mountain. See Table 60.



**Table 60. Comparison: Other attractions visited**

**Flagstaff Snowplay Survey - Site Comparisons - Other Attractions**

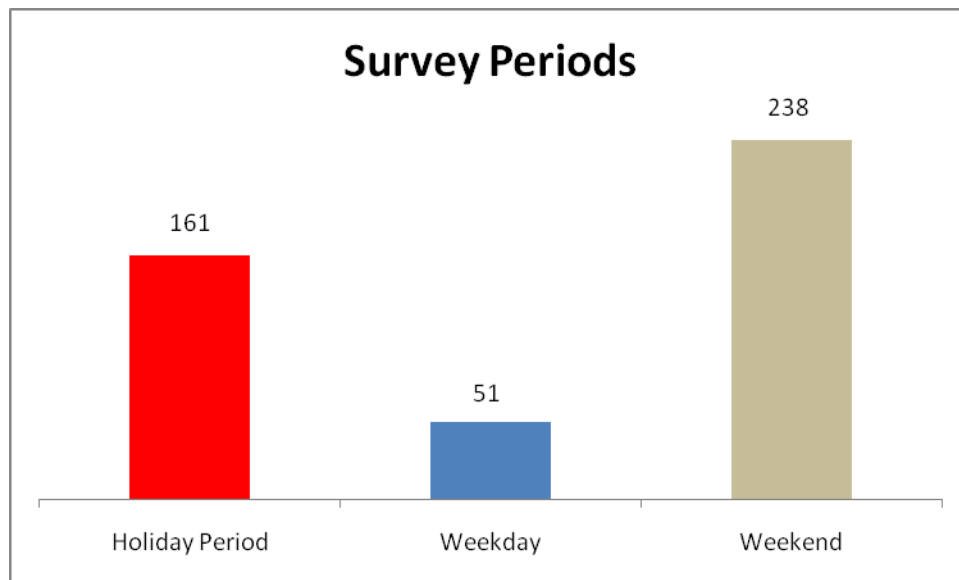
	Wing Mountain vs Other Dispersed Forest Sites			
	Wing Mountain Managed snowplay recreation area		Dispersed recreation sites on US Forest lands	
	Count	Column N %	Count	Column N %
NO OTHER ATTRACTIONS DEFINED	285	89.3%	110	85.3%
BUSTERS	1	.3%	0	.0%
DEER FARM	1	.3%	0	.0%
GAP	1	.3%	0	.0%
GRANNYS CLOSET	1	.3%	0	.0%
LITE PARADE	2	.6%	0	.0%
METEOR CRATER & MONTEZUMA CASTLE NM	0	.0%	1	.8%
MONTEZUMA'S CASTLE	1	.3%	1	.8%
MORMON LAKE	0	.0%	1	.8%
MOVIES	3	.9%	0	.0%
NAU	4	1.3%	0	.0%
NAU/POLAR EXPRESS	1	.3%	0	.0%
PIONEER MUSEUM	1	.3%	0	.0%
POLAR EXPRESS	11	3.4%	0	.0%
POLAR EXPRESS, DOWNTOWN WILLIAMS	1	.3%	0	.0%
POW WOW AT HIGH SCHOOL	0	.0%	1	.8%
PX, B OF A	1	.3%	0	.0%
RANDOM	1	.3%	0	.0%
SEDONA	2	.6%	3	2.3%
TRAIN WILLIAMS	1	.3%	0	.0%
VISITOR CENTER	0	.0%	2	1.6%
WALKER LAKE	0	.0%	1	.8%
WILLIAMS	1	.3%	0	.0%
WING MOUNTAIN	0	.0%	8	6.2%
WINSLOW	0	.0%	1	.8%
Total	319	100.0%	129	100.0%

## SURVEY FINDINGS: Chapter Three

### Comparison Holiday, Weekday and Weekend Visitors

This chapter provides a comparison of visitors during three distinct time periods: the holiday period (from opening day to January 4, 2010), weekdays and weekends. In total, 450 snowplay visitors were surveyed in the study; of these, 161 surveys (35.7%) were obtained during the holiday period, a further 51 surveys (11.3%) were obtained on weekdays, and the remaining 238 surveys (52.8%) were obtained on weekends. See Figure 3 below.

Figure 3. Holiday, Weekday and Weekend Snowplay Visitors.



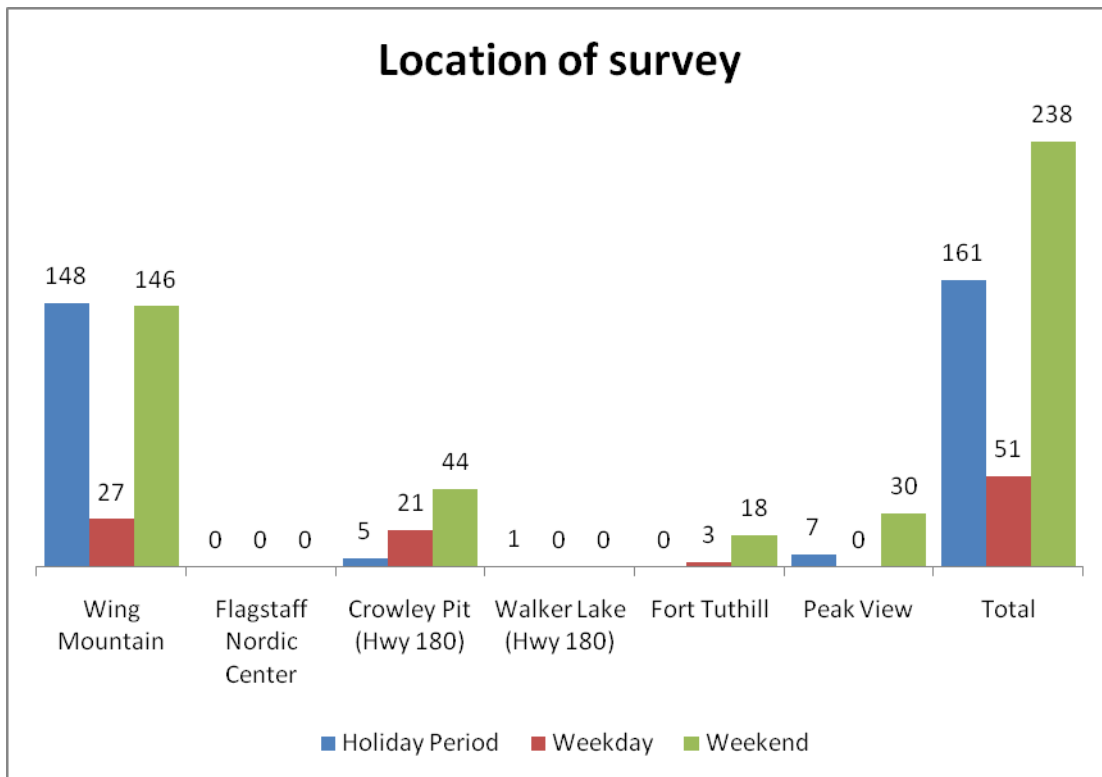
Nearly all surveys for the Holiday period (92%), and two-thirds of weekend surveys (61%) were obtained from Wing Mountain fee area, while the balance of the surveys were obtained from Crowley Pit, Peak View and Fort Tuthill, as shown in Table 61 and Figure 4.

**Table 61. Survey Site Locations by Holiday, Weekday and Weekend Surveys**

**Flagstaff Snowplay Survey - Holiday, Weekday, Weekend - Location of the surveys**

	Holiday, Weekday, Weekend					
	Holiday		Weekday		Weekend	
	Count	Column N %	Count	Column N %	Count	Column N %
Wing Mountain	148	91.9%	27	52.9%	146	61.3%
Flagstaff Nordic Center	0	.0%	0	.0%	0	.0%
Crowley Pit (Hwy 180)	5	3.1%	21	41.2%	44	18.5%
Walker lake (Hwy 180)	1	.6%	0	.0%	0	.0%
Fort Tuthill	0	.0%	3	5.9%	18	7.6%
Peak View	7	4.3%	0	.0%	30	12.6%
Total	161	100.0%	51	100.0%	238	100.0%

**Figure 4. Holiday, Weekday and Weekend Snowplay Visitors By Location**



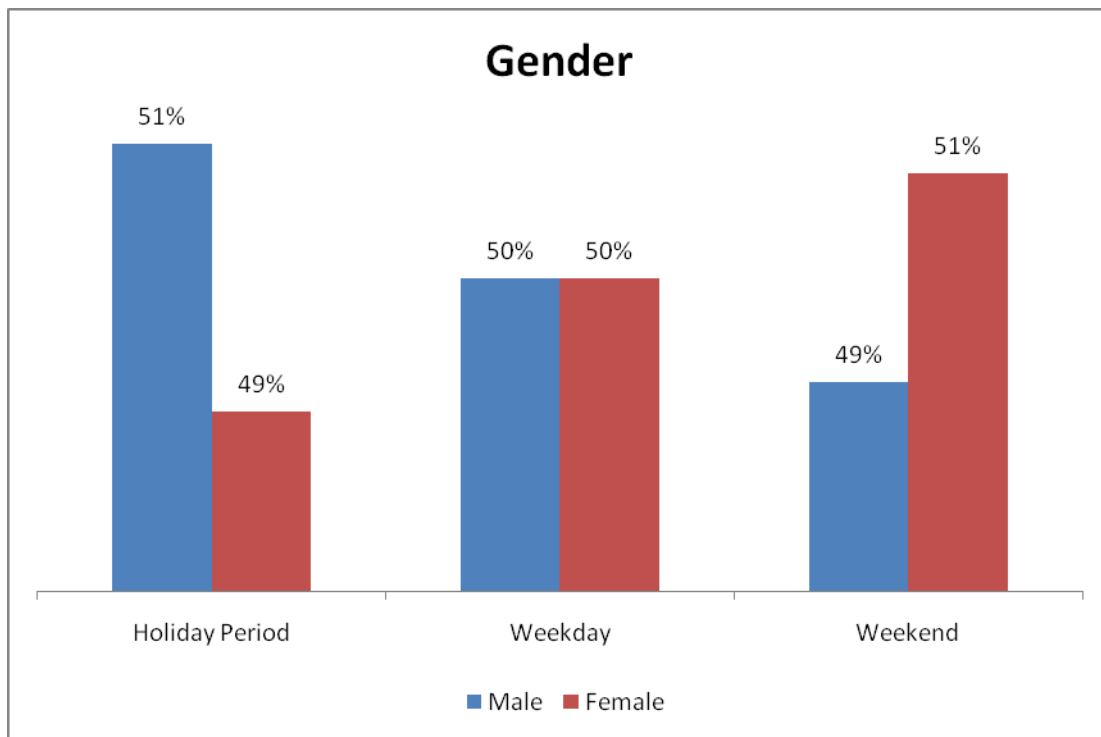
In all time periods, male and female survey respondents were equally split for the most part reflecting an extremely balanced sample. See Table 62, and Figure 5.

**Table 62. Holiday, Weekday and Weekend Snowplay Visitors by Gender**

**Flagstaff Snowplay Survey - Holiday, Weekday, Weekend - Gender of participants**

	Holiday, Weekday, Weekend					
	Holiday		Weekday		Weekend	
	Count	Column N %	Count	Column N %	Count	Column N %
Male	78	50.6%	25	50.0%	112	49.3%
Female	76	49.4%	25	50.0%	115	50.7%
Total	154	100.0%	50	100.0%	227	100.0%

**Figure 5. Holiday, Weekday and Weekend Snowplay Visitors By Location**



A comparison of visitor origins during these time periods, finds that all were dominated by out-of-town visitors, with very few locals included in the sample. See Table 63.

**Table 63. Holiday, Weekday and Weekend Snowplay Visitors by Do you live in the Flagstaff Area**

**Flagstaff Snowplay Survey - Holiday, Weekday, Weekend - Are you from the Flagstaff area (within 50 miles of Flagstaff, including Parks, Williams or Winslow) or do you own a second home in Flagstaff?**

	Holiday, Weekday, Weekend					
	Holiday		Weekday		Weekend	
	Count	Column N %	Count	Column N %	Count	Column N %
Yes	3	1.9%	2	4.2%	11	4.7%
No	155	98.1%	46	95.8%	224	95.3%
Total	158	100.0%	48	100.0%	235	100.0%

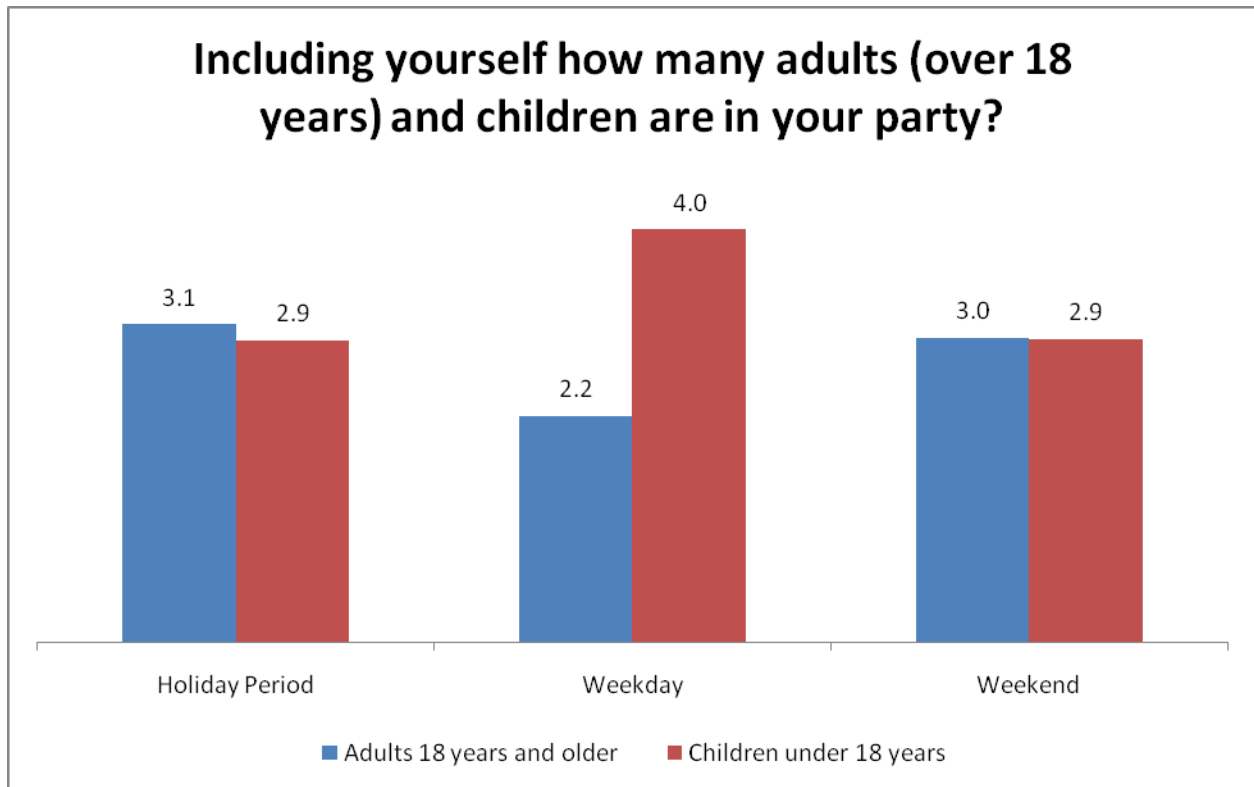
Parties containing larger numbers of adults appeared in the holiday period (3.1) and on weekends (3.0), a finding that coincides with larger family gatherings, while weekdays produced smaller numbers of adults (2.2) but more children (4.0). Children as part of parties during the holiday period and on weekends averaged 2.9. See Table 64, and Figure 6.

**Table 64. Holiday, Weekday and Weekend Snowplay Visitors by Adults and Children in Your Party**

**Flagstaff Snowplay Survey - Holiday, Weekday, Weekend - Including yourself how many adults (over 18 years) and children are in your party?**

	Holiday, Weekday, Weekend					
	Holiday		Weekday		Weekend	
	Mean	Median	Mean	Median	Mean	Median
Including yourself how many adults 18 years and older are in your party today?	3.1	2.0	2.2	2.0	3.0	2.0
How many children under 18 years and younger are in your party today?	2.9	2.0	4.0	2.0	2.9	2.0

Figure 6. Holiday, Weekday and Weekend Snowplay Visitors By Adults & Children



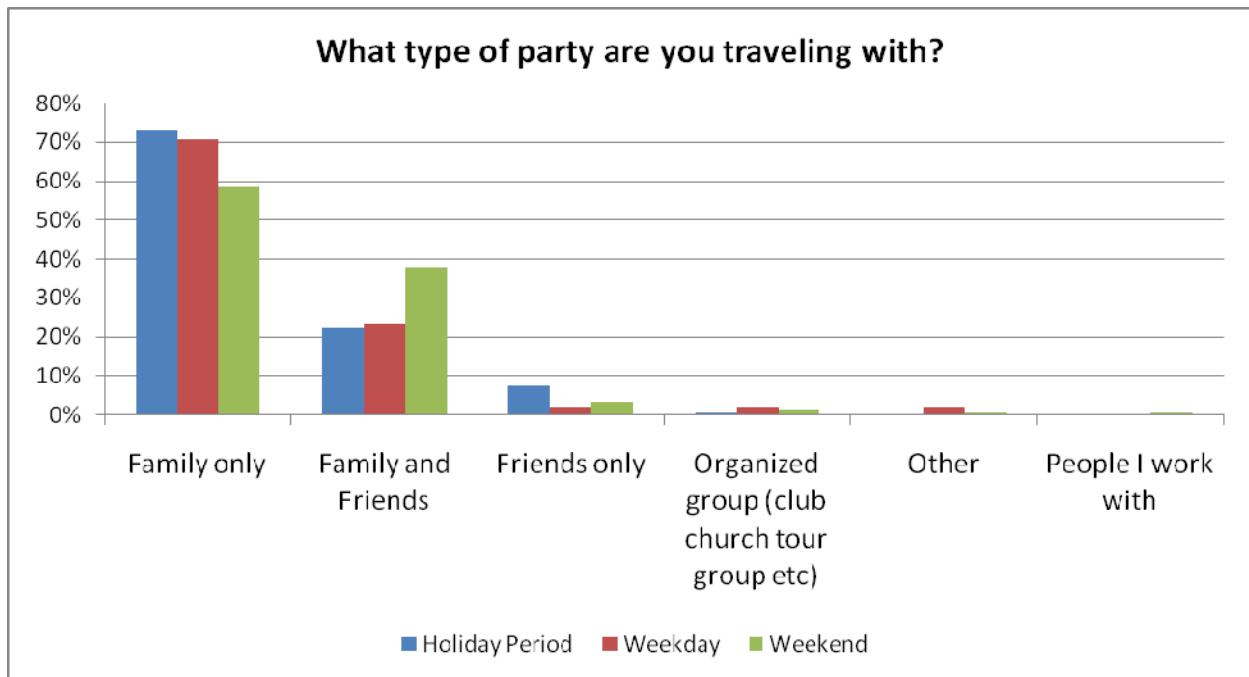
Visitors composed of “Family only” parties dominated during all three periods. Family only groups accounted for almost three-quarters (73.3%) of holiday visitors, and 70.6% of weekday visitors. While family only groups were not as dominant (58.8%) on weekends, they still comprised a majority of weekend visitors. More “family and friends” visitor parties appeared on weekends (37.8%). See Table 65 and Figure 7.

**Table 65. Holiday, Weekday and Weekend Snowplay Visitors by Party Type**

**Flagstaff Snowplay Survey - Holiday, Weekday, Weekend - What type of party are you snowplaying with?**

	Holiday, Weekday, Weekend					
	Holiday		Weekday		Weekend	
	Count	Column N %	Count	Column N %	Count	Column N %
Family only	118	73.3%	36	70.6%	140	58.8%
Family and Friends	36	22.4%	12	23.5%	90	37.8%
Friends only	12	7.5%	1	2.0%	8	3.4%
Organized group (club church tour group etc)	1	.6%	1	2.0%	3	1.3%
Other	0	.0%	1	2.0%	1	.4%
People I work with	0	.0%	0	.0%	1	.4%
Total	161	100.0%	51	100.0%	238	100.0%

**Figure 7. Holiday, Weekday and Weekend Snowplay Visitors By Adults & Children**



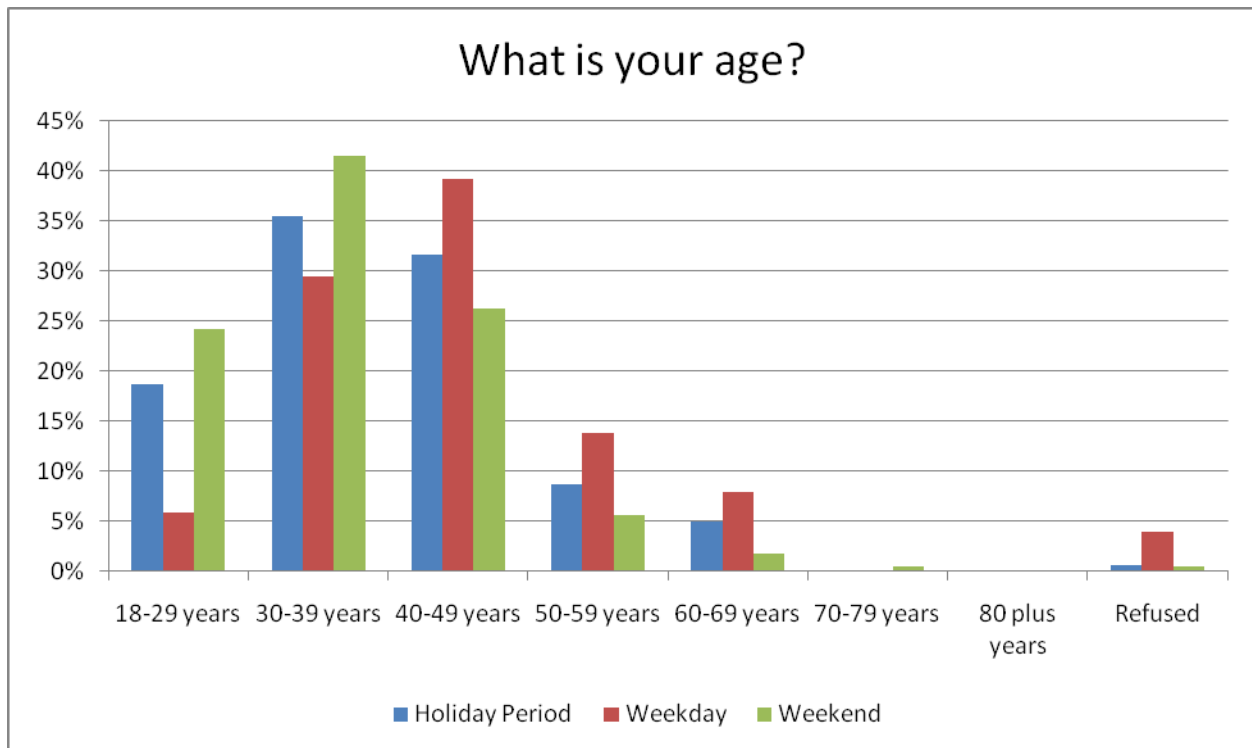
Weekday visitors had older average ages of the three groups – 25.4% of weekday visitors were age 50 or older, compared to 14.3% of holiday and 8% of weekend visitors. Weekend visitors were by far the youngest group, with 65.7 percent of all visitors under the age of 39 years. See Table 66 and Figure 8.

**Table 66. Holiday, Weekday and Weekend Snowplay Visitors by Participant Age**

**Flagstaff Snowplay Survey - Holiday, Weekday, Weekend - Age of participant**

	Holiday, Weekday, Weekend					
	Holiday		Weekday		Weekend	
	Count	Column N %	Count	Column N %	Count	Column N %
18-29 years	30	18.6%	3	5.9%	57	24.2%
30-39 years	57	35.4%	15	29.4%	98	41.5%
40-49 years	51	31.7%	20	39.2%	62	26.3%
50-59 years	14	8.7%	7	13.7%	13	5.5%
60-69 years	8	5.0%	4	7.8%	4	1.7%
70-79 years	0	.0%	0	.0%	1	.4%
80 plus years	0	.0%	0	.0%	0	.0%
Refused	1	.6%	2	3.9%	1	.4%
Total	161	100.0%	51	100.0%	236	100.0%

**Figure 8. Holiday, Weekday and Weekend Snowplay Visitors By Age of Participant**





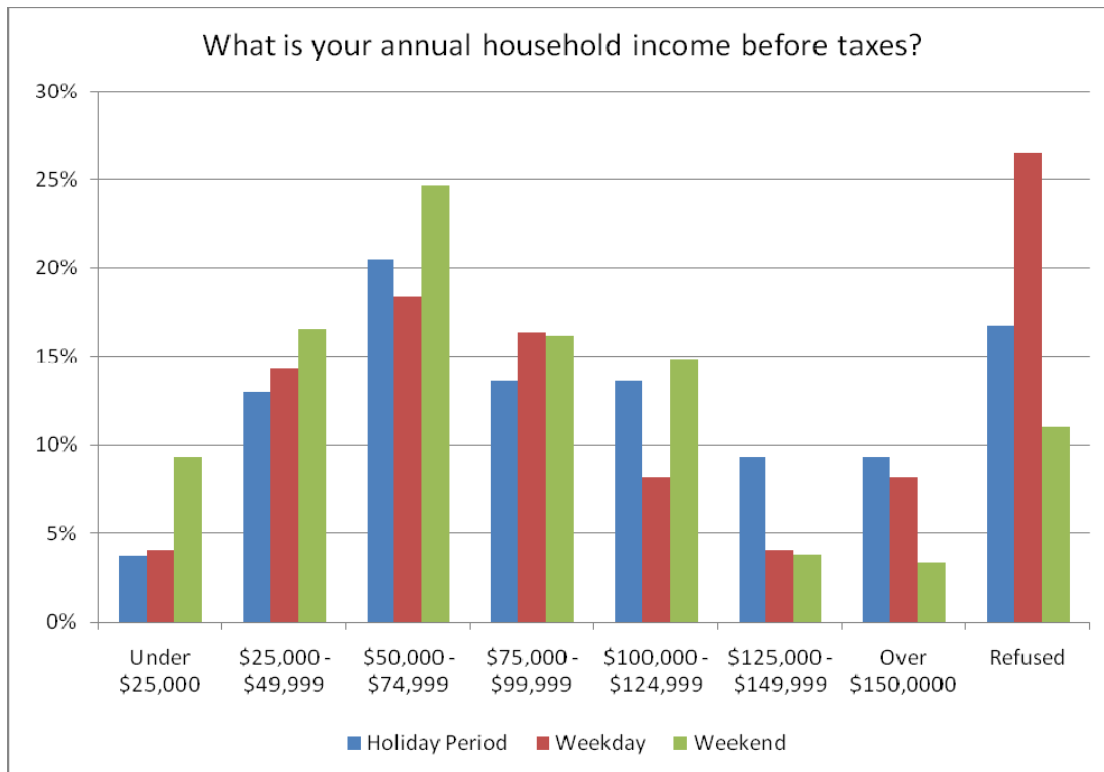
Holiday visitors had the highest annual incomes, with 32.3% in excess of \$100,000, followed by weekend visitors (22.1%). The lowest annual incomes belonged to weekend visitors, with one-quarter (26%) reporting incomes of \$49,999 or less. Overall, holiday visitors appeared to be a high value market, with fully one-third of all visitor parties having annual incomes in excess of \$100,000. See Table 67, Figure 9.

**Table 67. Holiday, Weekday and Weekend Snowplay Visitors by Annual Income**

**Flagstaff Snowplay Survey - Holiday, Weekday, Weekend - Annual household income before taxes?**

	Holiday, Weekday, Weekend					
	Holiday		Weekday		Weekend	
	Count	Column N %	Count	Column N %	Count	Column N %
Under \$25,000	6	3.7%	2	4.1%	22	9.4%
\$25,000 - \$49,999	21	13.0%	7	14.3%	39	16.6%
\$50,000 - \$74,999	33	20.5%	9	18.4%	58	24.7%
\$75,000 - \$99,999	22	13.7%	8	16.3%	38	16.2%
\$100,000 - \$124,999	22	13.7%	4	8.2%	35	14.9%
\$125,000 - \$149,999	15	9.3%	2	4.1%	9	3.8%
Over \$150,000	15	9.3%	4	8.2%	8	3.4%
Refused	27	16.8%	13	26.5%	26	11.1%
Total	161	100.0%	49	100.0%	235	100.0%

**Figure 9. Holiday, Weekday and Weekend Snowplay Visitors By Annual Income**



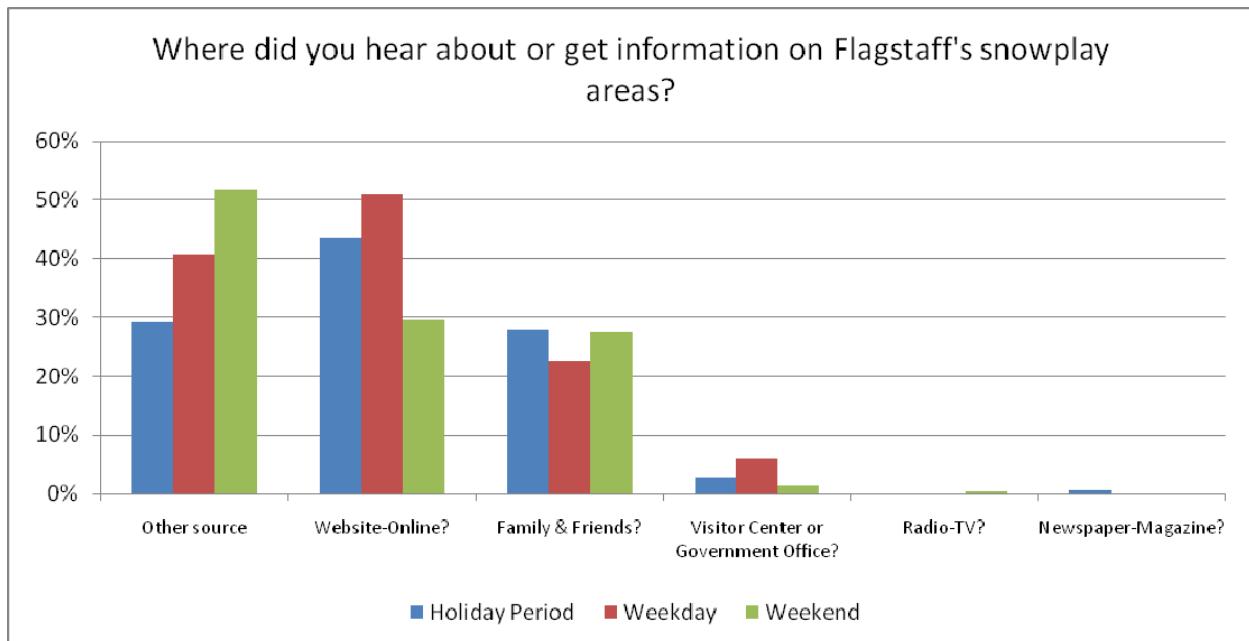
Weekday visitors (51%) made the greatest use of websites and online information sources in planning their snowplay trips, followed by holiday visitors (43.6%). Weekend (51.8%) and weekday (40.8%) visitors made the greatest use of “other” sources of information (generally previous visits or referrals from businesses). Family and friends were the next most frequently mentioned source of information over all categories. See Table 68, Figure 10.

**Table 68. Holiday, Weekday and Weekend Snowplay Visitors by Snowplay Information Sources**

**Flagstaff Snowplay Survey - Holiday, Weekday, Weekend - Where did you hear about or get information on Flagstaff's snowplay areas?**

	Holiday, Weekday, Weekend					
	Holiday		Weekday		Weekend	
	Count	Column N %	Count	Column N %	Count	Column N %
Other source	41	29.3%	20	40.8%	115	51.8%
Website-Online?	61	43.6%	25	51.0%	66	29.7%
Family & Friends?	39	27.9%	11	22.4%	61	27.5%
Visitor Center or Government Office?	4	2.9%	3	6.1%	3	1.4%
Radio-TV?	0	.0%	0	.0%	1	.5%
Newspaper-Magazine?	1	.7%	0	.0%	0	.0%
Total	140	100.0%	49	100.0%	222	100.0%

**Figure 10. Holiday, Weekday and Weekend Snowplay Visitors By Snowplay Information Sources**



How did visitors during these three time periods compare on the question of satisfaction with the experience? The following tables and figures provide much information about satisfaction on a range of experience attributes. In all, visitors during all three time periods reported very high levels of satisfaction; all scores were in the eight and nine-point range on a scale from one to 10, where 10 is high. In terms of overall satisfaction with the snowplay experience, few differences appeared as holiday visitors reported an average score of 9.3, weekday visitors 9.6, and weekend visitors 9.3. The lowest satisfaction scores, though they were still in the 8-point or very good range, were for road conditions, which weekday (8.4) and weekend (8.3) visitors scored lower than did holiday visitors (9.1). See all results in Tables 69A through 69C and Figure 11.

**Table 69a. Holiday Snowplay Visitors by Satisfaction with the Snowplay Experience**

**Flagstaff Snowplay Survey - Holiday, Weekday, Weekend - Tell us your level of satisfaction with the following:**

	Holiday, Weekday, Weekend										
	Holiday										
	Low level of satisfaction	2	3	4	Neither low nor high level of satisfaction	6	7	8	9	High level of satisfaction	Mean
Locating snow play areas & signage to areas	.6%	2.6%	.6%	.0%	3.9%	3.9%	7.1%	14.8%	14.2%	52.3%	8.7
Flagstaff area road conditions (taking into account the weather)	.0%	.0%	1.3%	1.3%	2.6%	2.6%	3.9%	12.3%	11.7%	64.3%	9.1
Traffic conditions in traveling to snow play areas	.0%	.0%	.6%	3.2%	3.9%	3.2%	3.9%	12.3%	11.7%	61.0%	9.0
Parking availability & conditions at snow play area	.0%	.0%	.0%	1.3%	.6%	.0%	3.9%	6.5%	15.6%	72.1%	9.5
Your current snow play-sledding experience	.0%	.0%	.0%	.0%	3.3%	1.3%	5.3%	6.6%	14.5%	69.1%	9.3
Your overall experience visiting Flagstaff on this trip	.0%	.0%	.0%	.0%	.6%	.0%	1.3%	9.7%	20.0%	68.4%	9.5

**Table 69b. Weekday Snowplay Visitors by Satisfaction with the Snowplay Experience**

**Flagstaff Snowplay Survey - Holiday, Weekday, Weekend - Tell us your level of satisfaction with the following:**

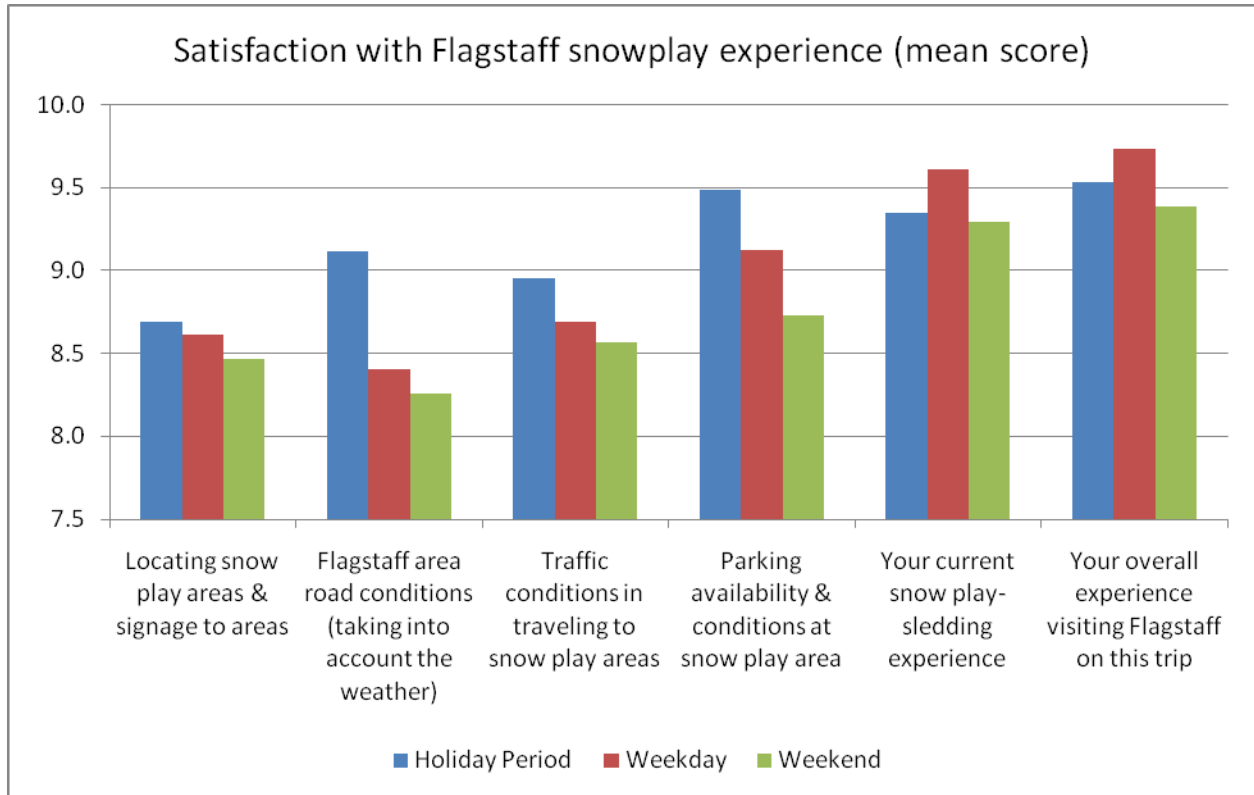
	Holiday, Weekday, Weekend										
	Weekday										
	Low level of satisfaction	2	3	4	Neither low nor high level of satisfaction	6	7	8	9	High level of satisfaction	Mean
Locating snow play areas & signage to areas	.0%	.0%	2.0%	4.1%	4.1%	2.0%	6.1%	18.4%	16.3%	46.9%	8.6
Flagstaff area road conditions (taking into account the weather)	.0%	.0%	.0%	.0%	10.2%	2.0%	16.3%	20.4%	10.2%	40.8%	8.4
Traffic conditions in traveling to snow play areas	.0%	.0%	2.1%	4.2%	2.1%	2.1%	4.2%	20.8%	18.8%	45.8%	8.7
Parking availability & conditions at snow play area	.0%	.0%	.0%	2.0%	2.0%	.0%	2.0%	20.4%	18.4%	55.1%	9.1
Your current snow play-sledding experience	.0%	.0%	.0%	.0%	.0%	.0%	2.2%	13.0%	6.5%	78.3%	9.6
Your overall experience visiting Flagstaff on this trip	.0%	.0%	.0%	.0%	.0%	.0%	.0%	4.1%	18.4%	77.6%	9.7

**Table 69c. Weekend Snowplay Visitors by Satisfaction with the Snowplay Experience**

**Flagstaff Snowplay Survey - Holiday, Weekday, Weekend - Tell us your level of satisfaction with the following:**

	Holiday, Weekday, Weekend										
	Weekend										
	Low level of satisfaction	2	3	4	Neither low nor high level of satisfaction	6	7	8	9	High level of satisfaction	Mean
Locating snow play areas & signage to areas	.0%	1.3%	1.8%	.9%	5.3%	6.2%	9.7%	15.0%	14.6%	45.1%	8.5
Flagstaff area road conditions (taking into account the weather)	.9%	.9%	1.8%	2.2%	5.7%	5.3%	10.1%	17.6%	18.5%	37.0%	8.3
Traffic conditions in traveling to snow play areas	.0%	.4%	1.3%	1.8%	4.4%	3.1%	8.8%	18.9%	21.1%	40.1%	8.6
Parking availability & conditions at snow play area	.9%	.9%	.9%	1.3%	3.1%	4.0%	7.9%	14.1%	14.5%	52.4%	8.7
Your current snow play-sledding experience	.0%	.5%	.0%	.5%	1.9%	.0%	6.9%	8.8%	16.7%	64.8%	9.3
Your overall experience visiting Flagstaff on this trip	.0%	.0%	.0%	.4%	.9%	.0%	4.4%	8.9%	23.1%	62.2%	9.4

**Figure 11. Holiday, Weekday and Weekend Snowplay Visitors By Satisfaction With Snowplay Experience**



A majority of all snowplay visitors were from Arizona, including all Weekday visitors (100%), and 99.1% of weekend visitors. The largest percentage of non-Arizona visitors (5.7%) was found, logically, during the holiday period when out-of-state relatives might have been visiting, but it still reflected a very low percentage. See Table 70.

**Table 70. Holiday, Weekday, Weekend Snowplay Visitors by Visitor Origins**

**Flagstaff Snowplay Survey - Holiday, Weekday, Weekend - What is the state of your permanent residence?**

	Holiday, Weekday, Weekend					
	Holiday		Weekday		Weekend	
	Count	Column N %	Count	Column N %	Count	Column N %
Florida	1	.6%	0	.0%	1	.4%
South Dakota	1	.6%	0	.0%	0	.0%
Montana	1	.6%	0	.0%	0	.0%
Texas	2	1.3%	0	.0%	1	.4%
Arizona	146	94.2%	48	100.0%	222	99.1%
California	4	2.6%	0	.0%	0	.0%
Total	155	100.0%	48	100.0%	224	100.0%



**Table 71. Holiday, Weekday, Weekend Snowplay Visitors by Arizona Origins**

**Flagstaff Snowplay Survey - Holiday, Weekday, Weekend - What is the Arizona city of your permanent residence?**

	Holiday, Weekday, Weekend		
	Holiday	Weekday	Weekend
	Column N %	Column N %	Column N %
ANTHEM - DESERT HILLS	2.9%	4.2%	1.9%
AVONDALE	1.4%	.0%	1.4%
BUCKEYE	2.1%	.0%	1.4%
BULLHEAD CITY	.0%	.0%	.5%
CATALINA	.0%	2.1%	.0%
CAVE CREEK	.7%	2.1%	.0%
CHANDLER	7.9%	4.2%	6.3%
COOLIDGE	.7%	.0%	.0%
CORONA DE TUCSON - VAIL	.7%	.0%	.0%
CORONADO	.0%	.0%	.5%
COTTONWOOD	.7%	.0%	.5%
DEWEY	.0%	2.1%	.0%
EL MIRAGE	.0%	6.3%	.5%
FLAGSTAFF	.0%	2.1%	.0%
FORT LOWELL	.7%	.0%	.0%
GILBERT	7.9%	6.3%	3.4%
GLENDALE	8.6%	10.4%	6.3%
GOODYEAR	.0%	2.1%	2.4%
GOODYEAR	.0%	.0%	1.0%
GUADALUPE	.7%	4.2%	1.4%
HEREFORD	.0%	.0%	.5%
HIGLEY	.0%	.0%	1.0%
LAVEEN	.0%	.0%	1.0%
LITCHFIELD PARK	.7%	.0%	1.4%
MESA	7.9%	6.3%	8.7%
NEW RIVER	.7%	.0%	.5%
ORO VALLEY	.7%	4.2%	.5%
PEORIA	7.1%	6.3%	5.8%
PHOENIX	21.4%	31.3%	37.2%
POMERENE	.0%	.0%	.5%
POSTON	.0%	.0%	.5%
PRESCOTT VALLEY	.7%	2.1%	.0%
SADDLEBROOKE	.0%	2.1%	.0%
SAHUARITA	.7%	.0%	.0%
SCOTTSDALE	10.7%	2.1%	5.8%
SIERRA VISTA	.7%	.0%	.0%
SUN CITY	2.1%	.0%	2.4%
SUN LAKES	2.1%	.0%	.5%
SURPRISE	3.6%	.0%	1.4%
TEMPE	1.4%	.0%	1.0%
TOLLESON	1.4%	.0%	1.4%
TUCSON	2.1%	.0%	1.0%
WADDELL	.7%	.0%	.0%
WITTMANN	.0%	.0%	.5%
YOUNGTOWN	.0%	.0%	.5%
YUMA	.0%	.0%	.5%
Total	100.0%	100.0%	100.0%

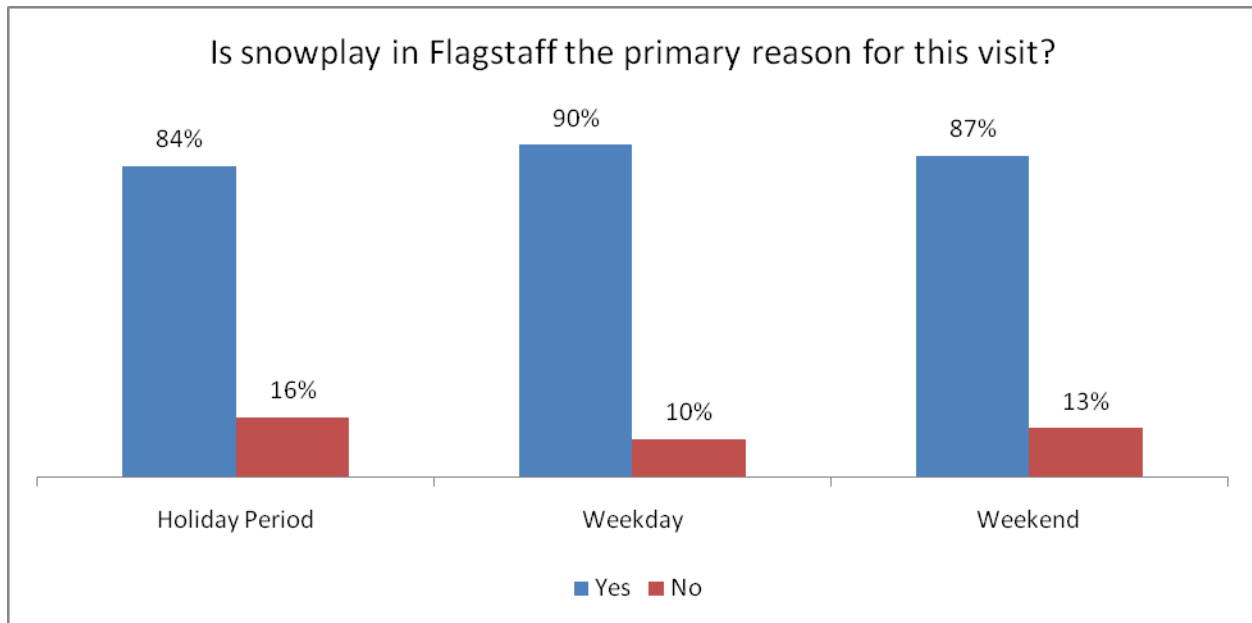
The vast majority of all visitors came to Flagstaff specifically for snowplay, with weekend (86.7%) and weekday visitors (89.6%) slightly more likely to be in Flagstaff for snowplay opportunities than holiday visitors (83.9%). See Table 72 and Figure 12.

**Table 72. Holiday, Weekday, Weekend Snowplay Visitors by Primary Reason Snowplay in Flagstaff**

**Flagstaff Snowplay Survey - Holiday, Weekday, Weekend - Is snowplay in Flagstaff the primary reason for this visit?**

	Holiday, Weekday, Weekend					
	Holiday		Weekday		Weekend	
	Count	Column N %	Count	Column N %	Count	Column N %
Yes	130	83.9%	43	89.6%	196	86.7%
No	25	16.1%	5	10.4%	30	13.3%
Total	155	100.0%	48	100.0%	226	100.0%

**Figure 12. Holiday, Weekday and Weekend Snowplay Visitors By Primary Reason for Visit**



**Table 73. Holiday, Weekday, Weekend Snowplay Visitors by Other Reason for Flagstaff Visit**

**Flagstaff Snowplay Survey - Holiday, Weekday, Weekend - If No what is the primary reason for this visit?**

	Holiday, Week Day, Weekend					
	Holiday Period		Weekday		Weekend	
	Count	Column N %	Count	Column N %	Count	Column N %
	136	84.5%	41	80.4%	224	94.1%
ASSOCIATION MEETING	0	.0%	0	.0%	1	.4%
AUDITION FOR NAU-MUSIC PROGRAM	0	.0%	0	.0%	1	.4%
BUSINESS	1	.6%	0	.0%	0	.0%
DAY TRIP TO FLAGSTAFF FROM PHOENIX FOR LEISURE	0	.0%	1	2.0%	0	.0%
ESCAPE FROM STRESS	0	.0%	0	.0%	1	.4%
FAMILY	1	.6%	0	.0%	0	.0%
GRADUATION	2	1.2%	0	.0%	0	.0%
GRAND CANYON	1	.6%	0	.0%	1	.4%
GRAND CANYON NP	0	.0%	0	.0%	1	.4%
HOLIDAYS	1	.6%	0	.0%	0	.0%
JUST TO GET OUT OF PHOENIX	0	.0%	1	2.0%	0	.0%
JUST VISITING	0	.0%	0	.0%	1	.4%
LEISURE TRAVEL GENERALLY	0	.0%	1	2.0%	0	.0%
NAU JAZZ FESTIVAL (FAMILY MEMBER WAS PARTICIPATING)	0	.0%	0	.0%	1	.4%
POLAR EXPRESS	16	9.9%	0	.0%	0	.0%
PRE-PENSION HOLIDAY	1	.6%	0	.0%	0	.0%
SKIING	0	.0%	1	2.0%	0	.0%
SKIING AT SNOWBOWL	0	.0%	1	2.0%	0	.0%
SKIING/SIGHTSEEING	0	.0%	0	.0%	1	.4%
SNOWBOARDING	0	.0%	1	2.0%	2	.8%
SNOWBOARDING/SKIING	0	.0%	0	.0%	1	.4%
SPRING BREAK	0	.0%	1	2.0%	0	.0%
TO VISIT GRAND CANYON	0	.0%	1	2.0%	0	.0%
TRAIN RIDE	1	.6%	0	.0%	0	.0%
VACATION-SPRING BREAK	0	.0%	1	2.0%	0	.0%
VACATION	1	.6%	0	.0%	0	.0%
VISIT UNIVERSITY	0	.0%	0	.0%	1	.4%
VISITING STUDENT AT NAU	0	.0%	0	.0%	1	.4%
WEEKEND VISIT GENERALLY-FROM PHOENIX AREA	0	.0%	0	.0%	1	.4%
WINSLOW AZ	0	.0%	1	2.0%	0	.0%
Total	161	100.0%	51	100.0%	238	100.0%

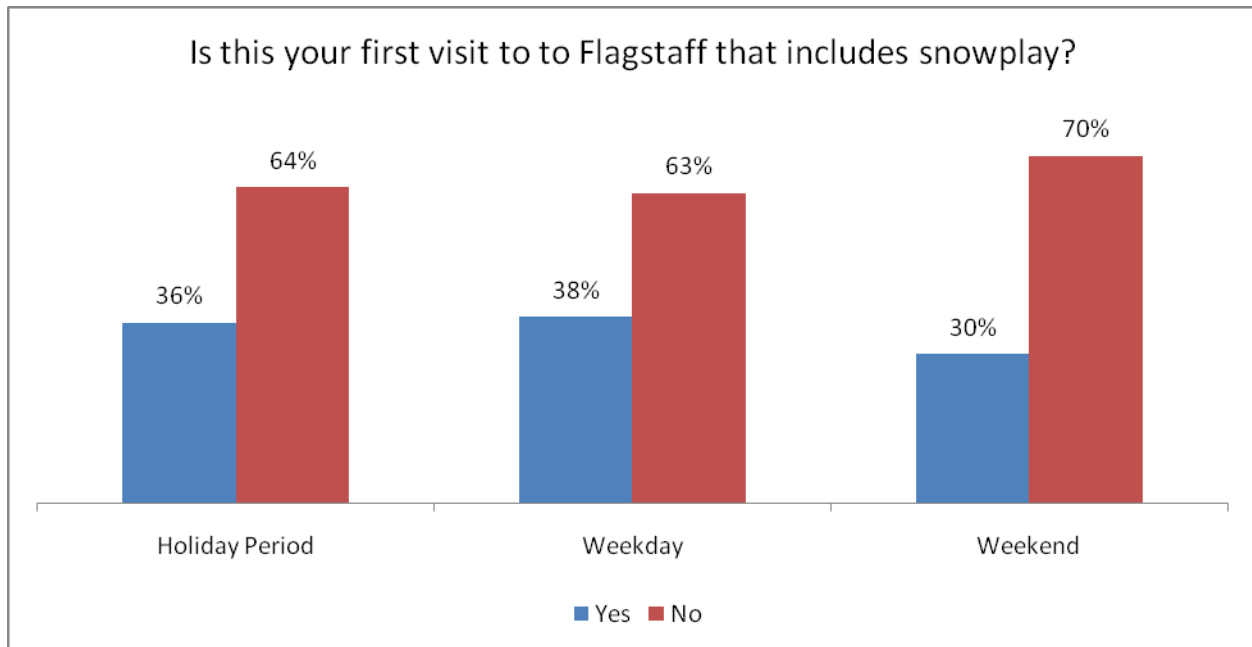
A majority of visitors in all three time groups had previously visited Flagstaff for snowplay activities. Weekend visitors, however, recorded the highest level of prior visits (70%), followed by holiday visitors (63.6%), and weekday visitors (62.5%). See Table 74 and Figure 13.

**Table 74. Holiday, Weekday, Weekend Snowplay Visitors by First Flagstaff Snowplay Visit**

**Flagstaff Snowplay Survey - Holiday, Weekday, Weekend - Is this your first visit to Flagstaff that includes snowplay?**

	Holiday, Weekday, Weekend					
	Holiday		Weekday		Weekend	
	Count	Column N %	Count	Column N %	Count	Column N %
Yes	56	36.4%	18	37.5%	66	30.0%
No	98	63.6%	30	62.5%	154	70.0%
Total	154	100.0%	48	100.0%	220	100.0%

**Figure 13. Holiday, Weekday and Weekend Snowplay Visitors By First Flagstaff Snowplay Visit**



Few differences were found between visitors during the three time periods with respect to their frequency of visits. Holiday and weekend visitors visited Flagstaff for snowplay an average of 1.9 times per winter, slightly higher than weekday visitors (1.7). Holiday and weekend visitors recorded the largest number of visits to Flagstaff in the last 12 months (2.7).

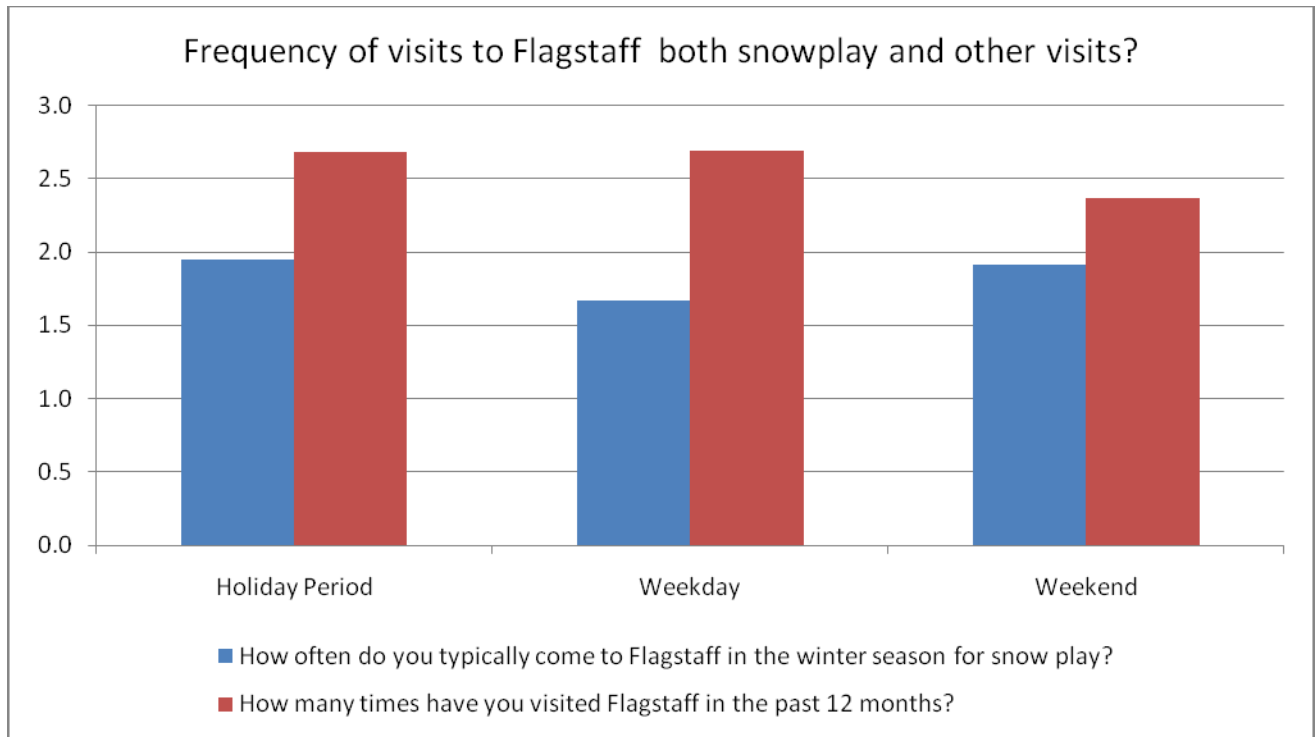
For day trip visitors, those on holidays had the longest visits (8.4 hours), while weekend (6.2 hours) and weekday visitors (6.3 hours) had shorter stays. Holiday visitors also had longer overnight stays (1.9 nights), than did weekend (1.8 nights) or weekday (1.4 nights) visitors. See Table 75 and Figure 14.

**Table 75. Holiday, Weekday, Weekend Snowplay Visitors by Trip Frequencies**

**Flagstaff Snowplay Survey - Holiday, Weekday, Weekend Visitors - by Visit Frequency**

	Holiday, Weekday, Weekend		
	Holiday	Weekday	Weekend
	Mean	Mean	Mean
If No how often do you typically come to Flagstaff in the winter season for snow play?	1.9	1.7	1.9
How many times have you visited Flagstaff in the past 12 months?	2.7	2.7	2.4
If day trip how many hours did you spend in Flagstaff?	8.4	6.3	6.2
If staying overnight how many nights did you spend in Flagstaff?	1.9	1.4	1.8

Figure 14. Holiday, Weekday and Weekend Snowplay Visitors By Frequency



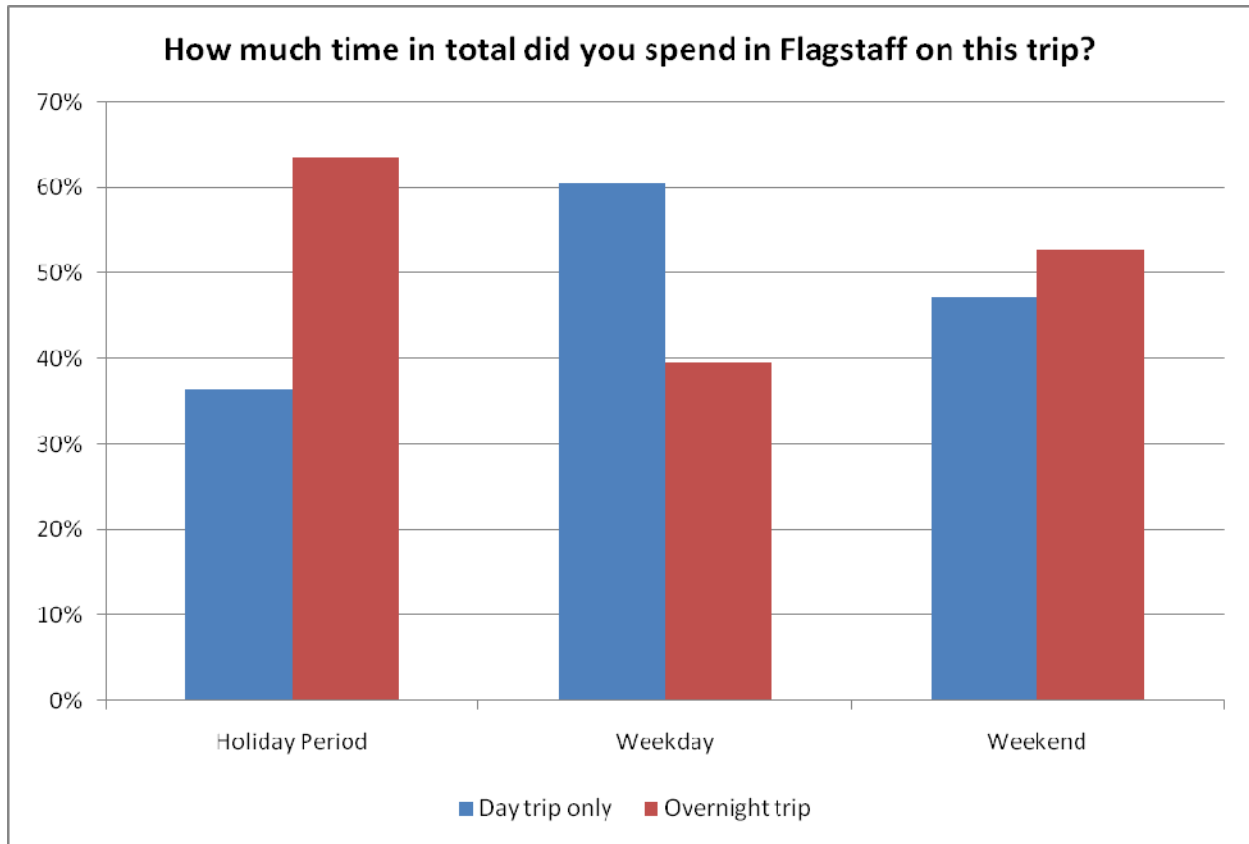
Almost two-thirds of holiday visitors (63.6%) visited Flagstaff as a part of an overnight trip, considerably larger than the percentage of weekend visitors (52.7%) who spent the night. Conversely, a majority of weekday visitors (60.4%) were on day trips to the Flagstaff area. See Table 76 and Figure 15.

**Table 76. Holiday, Weekday, Weekend Snowplay Visitors by Day Trip or Overnight Trip**

**Flagstaff Snowplay Survey - Holiday, Weekday, Weekend - How much time in total will you spend in Flagstaff on this trip?**

	Holiday, Weekday, Weekend					
	Holiday		Weekday		Weekend	
	Count	Column N %	Count	Column N %	Count	Column N %
Day trip only	55	36.4%	29	60.4%	105	47.3%
Overnight trip	96	63.6%	19	39.6%	117	52.7%
Total	151	100.0%	48	100.0%	222	100.0%

**Figure 15. Holiday, Weekday and Weekend Snowplay Visitors By Day Trip or Overnight Trip**



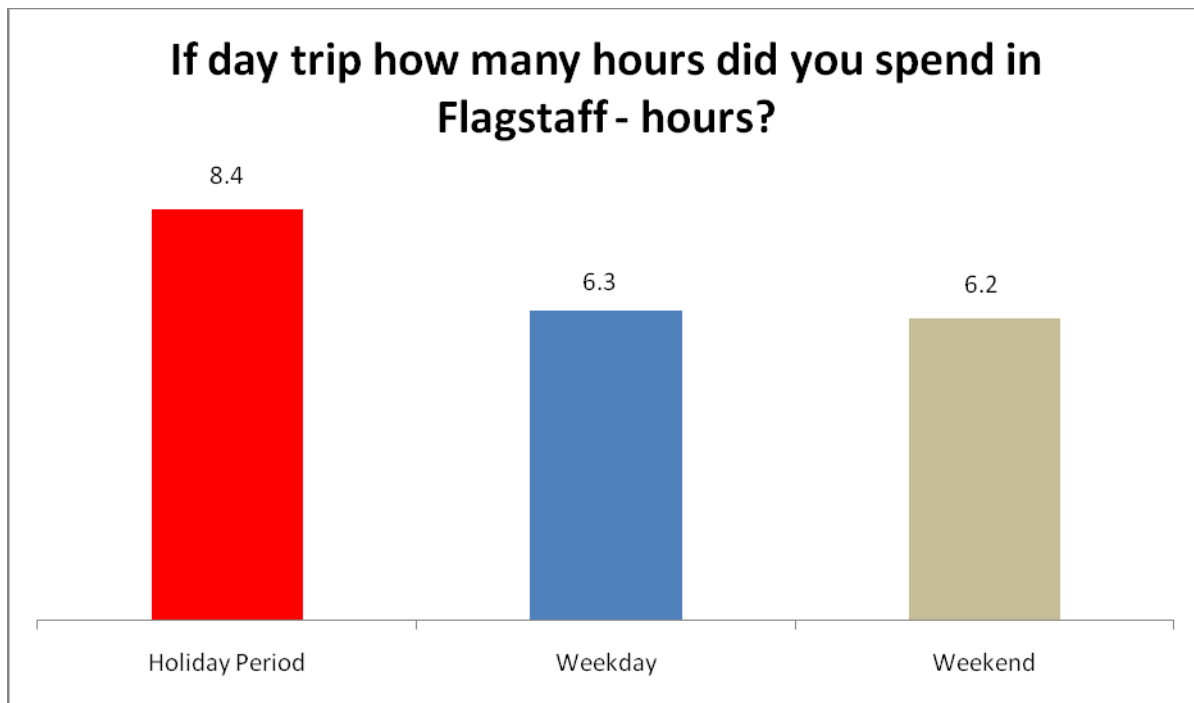
Holiday visitors on day trips spent an average of 8.4 hours in Flagstaff, the highest average number of hours of the three groups. Weekday visitors spent an average of 6.3 hours on day trips and weekend visitors averaged 6.2 hours. See Table 77 and Figure 16.

**Table 77. Holiday, Weekday, Weekend Snowplay Visitors by Day Trip - How Many Hours in Flagstaff**

**Flagstaff Snowplay Survey - Holiday, Weekday, Weekend - If a day trip only how many hours are you spending in Flagstaff?**

	Holiday, Weekday, Weekend					
	Holiday		Weekday		Weekend	
	Mean	Median	Mean	Median	Mean	Median
If day trip how many hours did you spend in Flagstaff?	8.4	10.0	6.3	6.0	6.2	6.0

**Figure 16. Holiday, Weekday and Weekend Snowplay Visitors By Day Trip - How many Hours in Flagstaff**





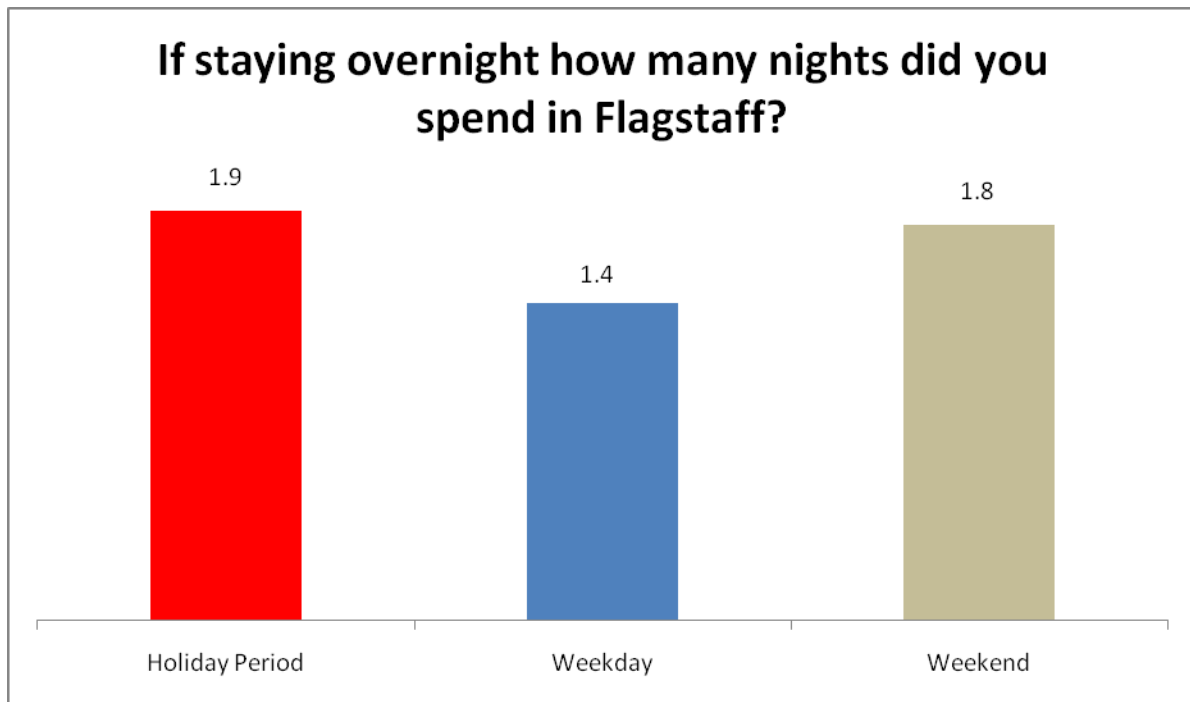
Holiday visitors stayed overnight an average of 1.9 nights, the longest overnights of the three groups. Weekend visitors stayed overnight an average of 1.8 nights and weekday visitors averaged 1.4 nights. See Table 78 and Figure 17.

**Table 78. Holiday, Weekday, Weekend Snowplay Visitors by Day Trip - How Many Nights in Flagstaff**

**Flagstaff Snowplay Survey - Holiday, Weekday, Weekend - If you are staying overnight how many nights are you spending in Flagstaff?**

	Holiday, Weekday, Weekend					
	Holiday		Weekday		Weekend	
	Mean	Median	Mean	Median	Mean	Median
If staying overnight how many nights did you spend in Flagstaff?	1.9	1.5	1.4	1.0	1.8	1.0

**Figure 17. Holiday, Weekday and Weekend Snowplay Visitors By Day Trip - How Many Nights in Flagstaff**



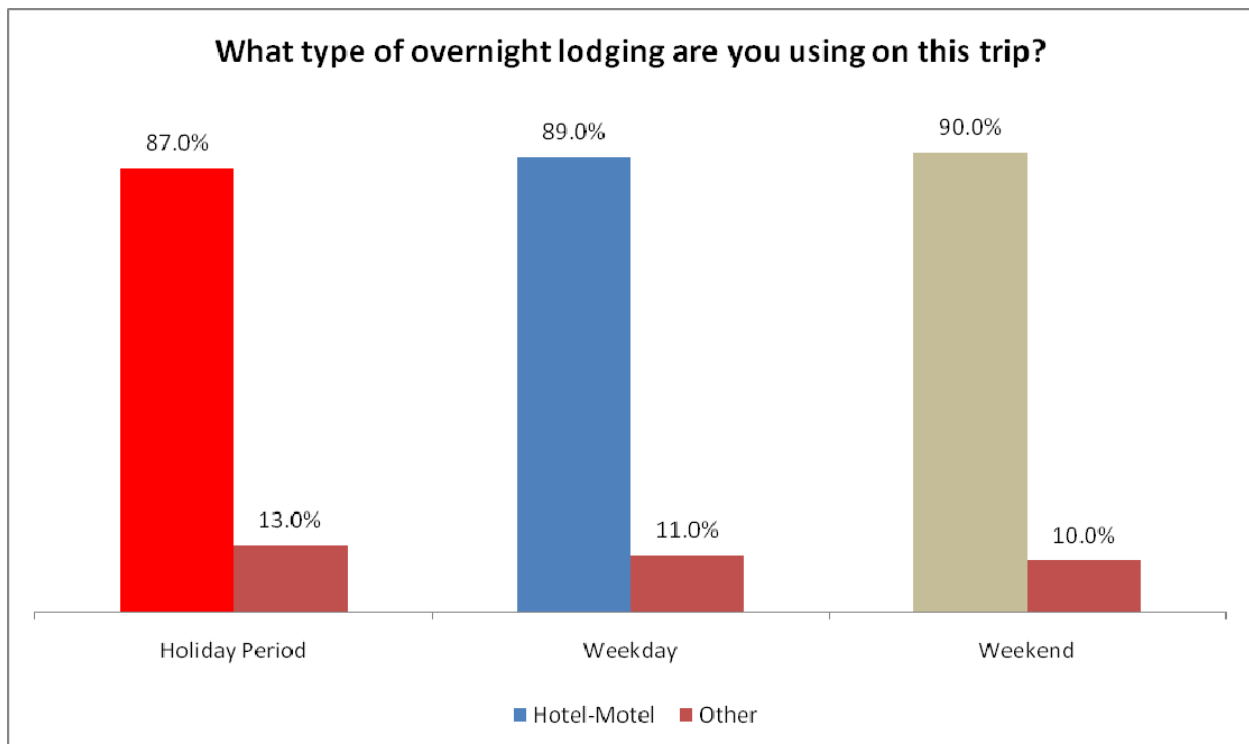
In choice of lodging, the majority of all visitors stayed in a hotel or motel, followed by low percentages using other sources of accommodation. One in ten holiday visitors did use a vacation rental. See Table 79 and Figure 18.

**Table 79. Holiday, Weekday, Weekend Snowplay Visitors by Type of Accommodation**

**Flagstaff Snowplay Survey - Holiday, Weekday, Weekend - What type of overnight lodging are you staying in on this trip?**

	Holiday, Weekday, Weekend					
	Holiday		Weekday		Weekend	
	Count	Column N %	Count	Column N %	Count	Column N %
Hotel-Motel	87	87.0%	17	89.5%	109	90.1%
Vacation Rental (condo or timeshare)	10	10.0%	0	.0%	2	1.7%
Home of friends or family	2	2.0%	1	5.3%	7	5.8%
Bed & Breakfast	0	.0%	0	.0%	2	1.7%
Campground or RV park	1	1.0%	0	.0%	1	.8%
Other	1	1.0%	1	5.3%	0	.0%
Total	100	100.0%	19	100.0%	121	100.0%

**Figure 18. Holiday, Weekday and Weekend Snowplay Visitors By Type of Accommodation**



**Table 80. Holiday, Weekday, Weekend Snowplay Visitors by Other Type of Accommodation**

**Flagstaff Snowplay Survey - Holiday, Weekday, Weekend - Other place you stayed?**

	Holiday, Weekday, Weekend					
	Holiday		Weekday		Weekend	
	Count	Column N %	Count	Column N %	Count	Column N %
NO OTHER PLACE	160	99.4%	50	98.0%	238	100.0%
DORM AT NAU	0	.0%	1	2.0%	0	.0%
NAT'L FOREST	1	.6%	0	.0%	0	.0%
Total	161	100.0%	51	100.0%	238	100.0%

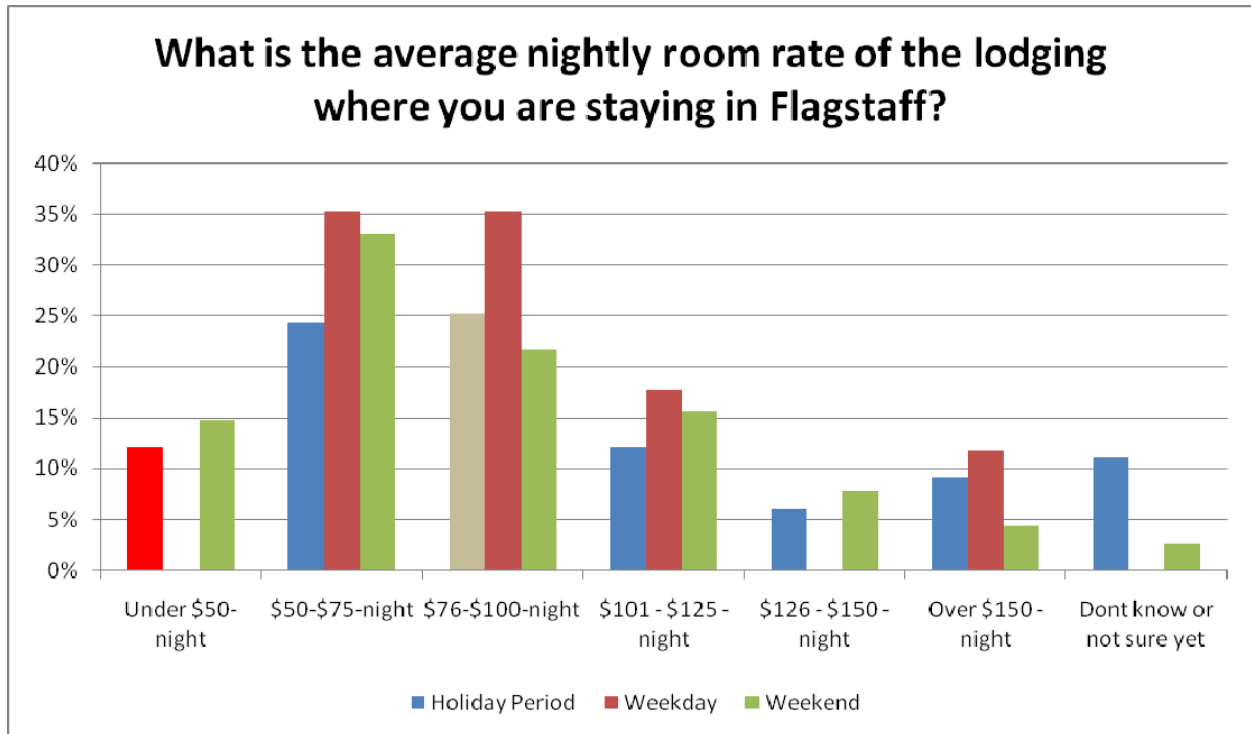
Nearly two thirds of weekday visitors (64.7%) paid room rates of \$76 and above, whereas half of holiday visitors (52.6%) and weekend visitors (49.5%) paid room rates as high as \$76 or more. Weekend visitors (47.8%) paid the lowest room rates, less than \$76 a night. See Table 81 and Figure 19.

**Table 81. Holiday, Weekday, Weekend Snowplay Visitors by Average Room Rate**

**Flagstaff Snowplay Survey - Holiday, Weekday, Weekend - What is the average nightly room rate of the lodging where you are staying in Flagstaff?**

	Holiday, Weekday, Weekend					
	Holiday		Weekday		Weekend	
	Count	Column N %	Count	Column N %	Count	Column N %
Under \$50-night	12	12.1%	0	.0%	17	14.8%
\$50-\$75-night	24	24.2%	6	35.3%	38	33.0%
\$76-\$100-night	25	25.3%	6	35.3%	25	21.7%
\$101 - \$125 - night	12	12.1%	3	17.6%	18	15.7%
\$126 - \$150 - night	6	6.1%	0	.0%	9	7.8%
Over \$150 - night	9	9.1%	2	11.8%	5	4.3%
Don't know or not sure yet	11	11.1%	0	.0%	3	2.6%
Total	99	100.0%	17	100.0%	115	100.0%

Figure 19. Holiday, Weekday and Weekend Snowplay Visitors By Average Room Rates



In terms of the party sizes these expenditures covered, weekday visitors (5.8 persons) had slightly larger average party sizes than holiday visitors and weekend visitors (5.5 persons each).

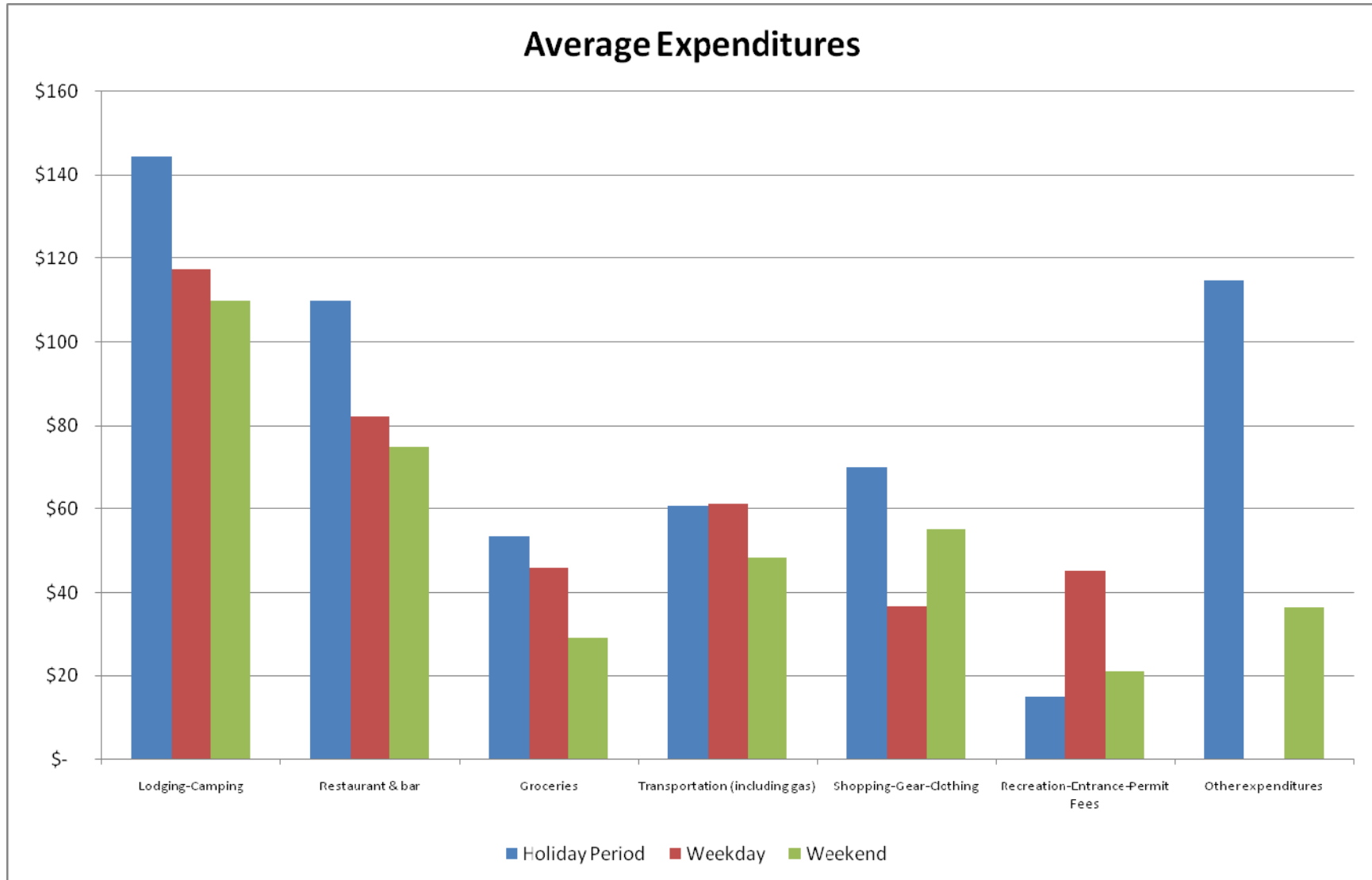
The largest expenditures per-party per-day were as follows. Holiday visitors had the largest per-party, per-day expenditures in five of seven categories including Lodging/Camping (\$144), Restaurant & Bar (\$110), Groceries (\$54), Shopping/Gear/Clothing (\$70), and Other expenditures (\$115). Weekday visitors had the highest Recreation & Permit Fees (\$45), and along with holiday visitors the highest Transportation costs (\$61). See all spending results in Table 82 and Figure 20.

**Table 82. Holiday, Weekday, Weekend Snowplay Visitors by Average Per-Party Expenditures and Party Size**

**Flagstaff Snowplay Survey - Holiday, Weekday, Weekend - Please estimate as closely as possible the amount your travel party is spending per day in Flagstaff for the following:**

	Holiday, Weekday, Weekend					
	Holiday		Weekday		Weekend	
	Mean	Median	Mean	Median	Mean	Median
Tell us the number of people these expenses cover?	5.5	5.0	5.8	4.0	5.5	4.0
Lodging-Camping	\$144	\$100	\$117	\$100	\$110	\$97
Restaurant & Bar	\$110	\$80	\$82	\$60	\$75	\$60
Groceries	\$54	\$50	\$46	\$43	\$29	\$20
Transportation (including gas)	\$61	\$50	\$61	\$40	\$48	\$40
Shopping-Gear-Clothing	\$70	\$50	\$37	\$20	\$55	\$40
Recreation-Entrance-Permit Fees	\$15	\$10	\$45	\$10	\$21	\$10
Other expenditures	\$115	\$85	.	.	\$37	\$20

Figure 20. Holiday, Weekday and Weekend Snowplay Visitors By Average Per-Party Expenditures and Party Size



**Table 83. Holiday, Weekday, Weekend Snowplay by Other Expenditures**

**Flagstaff Snowplay Survey - Holiday, Weekday, Weekend - Define other expenditures?**

	Holiday, Weekday, Weekend					
	Holiday		Weekday		Weekend	
	Count	Column N %	Count	Column N %	Count	Column N %
NO OTHER EXPENDITURES	147	91.3%	51	100.0%	234	98.3%
CANDLES (ARMADILLA WAXWORKS)	0	.0%	0	.0%	1	.4%
COLD MEDICATION	0	.0%	0	.0%	1	.4%
FOOD @ SNACK BAR	1	.6%	0	.0%	0	.0%
MEDICAL FACILITY	0	.0%	0	.0%	1	.4%
MISCELLANEOUS	1	.6%	0	.0%	0	.0%
MOVIES	2	1.2%	0	.0%	0	.0%
POLAR EXPRESS	6	3.7%	0	.0%	0	.0%
POLAR EXPRESS PACKAGE	1	.6%	0	.0%	0	.0%
SKIING	1	.6%	0	.0%	0	.0%
SKIING RENTAL	1	.6%	0	.0%	0	.0%
SLED/SNOWBOARD	0	.0%	0	.0%	1	.4%
SLEDS	1	.6%	0	.0%	0	.0%
Total	161	100.0%	51	100.0%	238	100.0%

When considering their visits to the various attractions and activities in the Flagstaff area, each of the groups had slightly different participation patterns. Holiday visitors were most inclined to visit Historic Downtown Flagstaff (40%), to visit Grand Canyon National Park (13.7%), or go to some other attraction (30.5%). Weekend visitors were most likely to go to Arizona Snowbowl (32.7%), Downtown Flagstaff (29.1%) or the Museum of Northern Arizona (11.8%). Weekday visitors shopped the most of any of the groups (51.9%) while also going to Arizona Snowbowl (25.9%), Lowell Observatory (18.5%) and Downtown Flagstaff (18.5%). See Table 84.

**Table 84. Holiday, Weekday, Weekend Snowplay by Attractions and Events You Visited**

**Flagstaff Snowplay Survey - Holiday, Weekday, Weekend - While staying in Flagstaff what other attractions or events do you plan to see?**

	Holiday, Weekday, Weekend					
	Holiday		Weekday		Weekend	
	Count	Column N %	Count	Column N %	Count	Column N %
Arizona Snowbowl	25	26.3%	7	25.9%	36	32.7%
Coconino Center for the Arts	0	.0%	0	.0%	1	.9%
Downtown Flagstaff (Heritage Square)	38	40.0%	5	18.5%	32	29.1%
Flagstaff Nordic Center	1	1.1%	0	.0%	4	3.6%
Flagstaff Winterfest	0	.0%	0	.0%	3	2.7%
Grand Canyon National Park	13	13.7%	3	11.1%	11	10.0%
Lowell Observatory	9	9.5%	5	18.5%	11	10.0%
Museum of Northern Arizona	6	6.3%	2	7.4%	13	11.8%
Events at Northern Arizona University	3	3.2%	3	11.1%	1	.9%
Pine Cone Drop (New Years)	1	1.1%	0	.0%	1	.9%
Riordan Mansion State Historic Park	2	2.1%	0	.0%	2	1.8%
Shopping	13	13.7%	14	51.9%	50	45.5%
Sunset Crater Volcano National Monument	0	.0%	0	.0%	2	1.8%
Walnut Canyon National Monument	0	.0%	0	.0%	0	.0%
Wupatki National Monument	0	.0%	0	.0%	0	.0%
Other attraction	29	30.5%	1	3.7%	27	24.5%
Don't know	12	12.6%	6	22.2%	2	1.8%
Total	95	100.0%	27	100.0%	110	100.0%



## **APPENDIX A**

### **Comments**

Flagstaff Snowplay Survey - Other information source about snowplay areas?	Count	Column N %
NO OTHER SOURCES	257	57.1
ALBERTSONS DELI COUNTER	1	0.2
AT WING MOUNTAIN & BEEN BEFORE	1	0.2
ATTENDED NAU	1	0.2
BEEN BEFORE-DRIVING BY	1	0.2
BEEN BEFORE	42	9.3
BEEN BEFORE AND LOCAL BUSINESS-GEAR/OUTFITTER STORE	1	0.2
BEEN BEFORE AND USED FACEBOOK SITE FOR FLAGSTAFF		
NORDIC CENTER	1	0.2
BEEN HERE BEFORE	5	1.1
BEEN HERE YEARS	1	0.2
BEEN OFTEN BEFORE	1	0.2
BOY SCOUTS	1	0.2
BROTHER	1	0.2
CAME HERE	1	0.2
CO	1	0.2
COME BEFORE	1	0.2
COME OFTEN	1	0.2
COMING FOR YEARS	1	0.2
CONCIERGE/FAIRFIELD	1	0.2
DIRTBIKES IN AREA	1	0.2
DISCOUNT TIRE""	1	0.2
DRIVIN BY AND FOUND IT	1	0.2
DRIVING AROUND	1	0.2
DRIVING BY-FOLLOW OUR NOSES	1	0.2
DRIVING BY	10	2.2
DRIVING BY 10 YEARS AGO	1	0.2
DRIVING BY/FOUND BY ACCIDENT	1	0.2
DRIVING BY/SIGNS	1	0.2
DRIVING PAST & STOPPED	1	0.2
DROVE BY	2	0.4
DROVE BY YEARS AGO	1	0.2
FOUND FT TUTHILL WHILE DRIVING	1	0.2
FOUND IT	1	0.2
FOUND IT DRIVING BY	1	0.2
FOUND IT WHEN ARRIVED IN FLAGSTAFF	1	0.2
FOUND IT WHILE DRIVING	2	0.4
FOUND IT WHILE DRIVING 180	1	0.2

Flagstaff Snowplay Survey - Other information source about snowplay areas?	Count	Column N %
FOUND SITE TRAVELLING HWY 180	1	0.2
GALAXY DINER WAITRESS	1	0.2
GAS STATION	2	0.4
HEARD ABOUT IT/WORD-OF-MOUTH	1	0.2
HOTEL-LOCAL BUSINESS	1	0.2
HOTEL	7	1.6
HOTEL CONCIERGE	2	0.4
HOTEL FLYER	1	0.2
HOTEL MAP	1	0.2
HOUSE RENTAL	1	0.2
INFO IN RENTAL	1	0.2
JUST COME EVERY YEAR	1	0.2
JUST DROVE	1	0.2
KNEW ABOUT AREA	1	0.2
KNEW ABOUT IT-BEEN BEFORE	1	0.2
KNEW ABOUT IT	1	0.2
KNOW ABOUT AREA	1	0.2
LIVED HERE IN AREA A LONG TIME	1	0.2
LOCAL-KNEW ABOUT IT	1	0.2
LOCAL BUSINESS-GAS STATION	4	0.9
LOCAL BUSINESS-HOTEL	2	0.4
LOCAL BUSINESS-HOTEL AND FOLLOWING NORDIC CENTER ON FACEBOOK	1	0.2
LOCAL BUSINESS-SHELL STATION AT 180	1	0.2
LOCAL BUSINESS-STOPPED AND BEEN BEFORE	1	0.2
LOCAL BUSINESS	10	2.2
LOCAL INFO/CONVERSATION AT WING MOUNTAIN	1	0.2
MIKE & RHONDA'S	1	0.2
MOM	1	0.2
MOTEL	2	0.4
NATIVE AZ-KNEW ABOUT IT	1	0.2
NAU ALUMNI	1	0.2
PAMPHLET	1	0.2
PARK RANGER YEARS AGO	1	0.2
PART OF GROUP	1	0.2
PAST VISITS	1	0.2
PEACE SURPLUS	1	0.2
PHONE CALLING AROUND	1	0.2

Flagstaff Snowplay Survey - Other information source about snowplay areas?	Count	Column N %
PREVIOUS TRIP W/CUB SCOUTS	1	0.2
RACI THREADS	1	0.2
REFERRED	3	0.7
ROAD	1	0.2
ROAD SIGN	2	0.4
SAW AS DRIVING BY	1	0.2
SAW IT DRIVING BY	1	0.2
SAW ON THE DRIVE	1	0.2
SAW SIGNS/LOCAL BUSINESS	1	0.2
SAW WHEN DRIVING	1	0.2
SAW WHILE DRIVING	1	0.2
SIDE OF ROAD	1	0.2
SIGN BY ROAD	1	0.2
SIGN BY SNOWBOWL	1	0.2
SNOWBOARD	1	0.2
SNOWBOWL	3	0.7
SNOWBOWL GUEST SERVICES	1	0.2
SNOWBOWL MAP	1	0.2
SNOWBOWL RANGERS	1	0.2
SNOWBOWL SIGNS	1	0.2
SNOWBOWL/LITTLE KID	1	0.2
SNOWBOWL/NORDIC WEBSITE	1	0.2
SPORTING GOODS STORE	1	0.2
SUPER 8 MOTEL	1	0.2
THREADS	1	0.2
TRAVELLING THROUGH	1	0.2
TV NEWS	1	0.2
VISIT EVERY YEAR	1	0.2
VISITED	1	0.2
VISITED LAST YEAR	1	0.2
WIFE	1	0.2
WING MOUNTAIN	1	0.2
WM KIOSK	1	0.2
WOODY MOUNTAIN CAMPGROUND	1	0.2
WORD OF MOUTH	2	0.4
WORKED W/FOREST SVC	1	0.2
Total	450	100.0

GENERAL COMMENTS:

A LOT OF FUN

ACCEPT CARDS, NOT JUST CASH

ADD BENCHES, PLOW PARKING LOT, GRILL

ADD MORE SEATING-PICNIC TABLES & CHAIRS

ADD MORE SLIDING HILLS, GETS ICY ONCE THERE ARE SO MANY PEOPLE.

ADVERTISE FOR MORE VOLUNTEER HELP IN CLEANING UP SNOWPLAY SITES AT END OF SEASON. WOULD LIKE TO VOLUNTEER.

ALWAYS HAVE FUN WHEN VISIT FLAGSTAFF

ARE THERE RESTROOMS AT FT TUTHILL SITE?

ATM/CARD ACCEPTANCE A MUST

AWESOME

AWESOME FOR LITTLE KIDS, FAMILY & FRIENDS. PARKING STAFF IS AMAZING.

AWESOME HILL

BALES OF HAY ALL ALONG THE BOTTOM OF SKI AREA FOR THOSE THAT CAN'T STAND

BE A LITTLE MORE ORGANIZED, STAY ON TOP OF PEOPLE BREAKING RULES. FIND WAY TO MAKE IT UP THE HILL EASIER.

BEAUTIFUL PLACE

BEAUTIFUL! FEELS GOOD HERE.

BEEN A BLAST

BEEN FUN

BEEN FUN

BEEN GREAT

BEER

BETTER BATHROOMS, MAYBE LADIES ONLY BATHROOMS

BETTER IF HAD ROPE TOW, STEEPER HILLS

BETTER PLOWERS FOR CITY

BETTER RESTAURANTS IN TOWN

BETTER SIGNAGE FOR SNOWPLAY AREAS ALONG ROADWAY-DON'T HIDE SIGNS

BETTER SIGNAGE FOR SNOWPLAY AREAS CLOSER TO TOWN-MORE FREQUENT SIGNS.

BETTER WAY TO GET BACK UP HILL

BIGGER HILLS, BETTER/CLEARER SIGNS FOR WALKING/SLEDDING AREAS

BIGGER HILLS, MORE FOOD

BIGGER SNOW AREA WOULD BE NICE AS WELL AS BIGGER HILLS.  
BUILD A LODGE TO WARM UP  
BUMPY, MUDDY ROAD...PARKING. HILLS ARE SAFE, NOT TOO STEEP, GUY WITH MEGAPHONE IS HELPFUL.  
CAN YOU TAKE MY KIDS?  
CHEAPER SLEDS  
CLEAN PORTA POTTIES IS AWESOME. MOVE A FEW TO PARKING LOT.  
CLOSER HANDICAPPED PARKING  
CONVENIENCE FROM PHOENIX AREA. VARIETY.  
CROWLEY PIT NEEDS CONCESSION STAND & FIRE PIT.  
DIDN'T LIKE \$10 FEE AT WING MOUNTAIN  
DO SUCH A GOOD JOB W/PARKING LOT ORGANIZATION, SHOULD MANAGE SLEDDERS BETTER.  
DOGS POOPING & NOT BEING CLEANED UP AFTER. MORE TRASH CANS.  
DOING PRETTY GOOD  
DON'T LIKE THE TEAPARTY PROTESTERS  
EASIER ACCESS TO KIDDIE HILLS (TOP). WELL RUN & MAINTAINED. EASIER UP TRAILS.  
ENJOY SNOWPLAY  
ENTRANCE BOOTH CONGESTION-ADD MORE BOOTHS-15 MINUTES IN THE LINE  
EVERYONE'S FRIENDLY  
EVERYTHING FINE THE WAY IT IS  
EVERYTHING IS GOOD.  
EVERYTHING IS WONDERFUL  
EXPAND, MAKE HIGHER HILLS & MORE SLEDDING. WELL-MANAGED. SAFER THAN CROWLEY PIT.  
FABULOUS, WONDERFUL  
FACILITIES SHOULD BE CLOSER TO VEHICLE  
FINE  
FIRST TIME HERE  
FLAGSTAFF AWESOME; CHEAPER SLEDS  
GENERAL ORGANIZATION OF PLAY AREAS  
GLAD IT'S HERE  
GOOD DAY UP HERE!  
GOOD HILLS OUT HERE. PEAK VIEW NOT AS GOOD. ADD MORE HAY STACKS.  
GOOD JOB WITH PLAY; ROPE TOW

GOOD TO ACCEPT DOGS  
GOOD TO HAVE CONCESSIONS & BATHROOMS  
GOOD TO HAVE PARKING ATTENDANTS, PEOPLE W/BULLHORNS  
GOOD TO HAVE PORT-A-POTTIES  
GREAT HERE  
GREAT LIKE ORGANIZATION & AMENITIES. FRIENDLY PEOPLE.  
GREAT PRICE, WOULD COME @ \$15  
GREAT SPOT  
GREAT TO HAVE IT HERE  
HAVE BEEN UP TO FLAGSTAFF 4-5 TIMES THIS YEAR-GREAT TIME.  
HAVIN FUN  
HAVING FUN  
HIGHER HILL, RAMPS  
HOPE IT STAYS OPEN!  
I AM REALLY HAPPY W/FT TUTHILL SITE  
I LIKE SNOW. I LIKE THE WAY IT TASTES!  
I'LL COME BACK AGAIN.  
IMPRESSED WITH PRICES @ CONCESSION STAND. ANNUAL PASS TO ENCOURAGE RETURN TRIPS/COUPONS  
IMPROVE PARKING LOT-SNOWY FOR LITTLE CARS  
IMPROVE ROADS, EVERYONE'S LAID BACK, ROPE TOW  
IMPROVE SIGNAGE-PRE SNOWBOWL SIGN (SNOW  
IMPROVE SIGNS ON THE WAY OUT HERE, MORE FOOD OPTIONS.  
IMPROVED ROADS WOULD BE NICE  
IN TOWN TRAFFIC IS BAD; SNOWPLAY IS GREAT  
INJURIES COULD BE A PROBLEM. PLEASE CONSIDER A MEDICAL TEAM ONSITE.  
IT'S BEAUTIFUL  
IT'S COOL, NICE TO HAVE AREA TO GET INTO SNOW  
IT'S FUN  
IT'S GREAT  
IT'S GREAT. RECOMMEND BRINGING CHAIRS, MORE SITTING ROOM  
KEEP PEOPLE OUT OF BOTTOM OF HILL, FLAG LINES INSTEAD OF SIGNS FOR WALKING BACK UP HILL  
KEEP THE FIRE PIT GOING

LESS ROCKS  
LIFT  
LIKE BONFIRES & CONCESSION STAND  
LIKE CONCESSION STAND  
LIKE EVERYTHING SO FAR. NICE WEATHER. BUILD A STARBUCKS.  
LIKE FLAGSTAFF!  
LIKE FLAGSTAFF-DRIVING THROUGH ON MOVE TO FLORIDA  
LIKE HAVING CLEAN RESTROOMS, LA FONDA'S IS THE BEST.  
LIKE HOW OPEN IT IS NOW. AREAS FOR ALL AGES ARE GOOD. LIKES CONCESSIONS.  
LIKE IT HERE  
LIKE THE KID HILLS  
LIKES NO FEE AND PORT-A-POTTIES IN PARKING LOT  
LONGER WUSSIE RUNS-ONES THAT AREN'T TOO STEEP  
LOUDER CHRISTMAS MUSIC, EMT ON HAND OR FASTER RESPONSE  
LOVE FLAGSTAFF  
LOVE IT AND WILL BE BACK.  
LOVE IT HERE. GREAT TO HAVE CONCESSIONS.  
LOVE IT, LOVE THE FIRE & CONCESSION STAND  
LOVE THE SNOW  
MAKE HILL BIGGER  
MAKE SIGNS BETTER ON WAY OUT  
MAKE SURE PORT-A- POTTIES ARE SERVICED-CURRENTLY DISGUSTING  
MORE BALES OF HAY, PICNIC TABLES  
MORE CLEARLY MARK HWY 180, MORE PERSONNEL WATCHING BOTTOM OF BIG SLOPE. MORE ORGANIZATION@ TOP & BOTTOM. INSTALL  
LANES AT TOP  
MORE CLEARLY MARKED SLED/WALK AREAS ON SMALLER HILLS (ROPES OR SOMETHING)  
MORE EVENING PROGRAMS & MORE AVAILABLE INFORMATION IN LODGING FACILITIES ABOUT LOCAL EVENTS.  
MORE INFO ABOUT THE SNOWPLAY AREAS ON INTERNET  
MORE PARKING @ THE PLACE  
MORE PARKING, LOVE PLAY AREA, TEN TIMES BETTER THAN SNOWBOWL  
MORE PICNIC TABLES  
MORE PICNIC TABLES, MORE BON FIRES



MORE PROMOTION-ONLY HEARD THROUGH FRIENDS  
MORE SEATING, IMPROVE DRIVEWAY  
MORE SIGNS AT THE ENTRANCE  
MORE SIGNS TO SNOWPLAY AREAS.  
MORE SLEDDING AREAS  
MORE SNOWPLAY AREA SIGNS ON I-17 BEFORE GET TO TOWN. WING MOUNTAIN OPEN TIL 5PM WOULD BE GOOD.  
MORE SNOWPLAY AREAS. TOO CROWDED ALONG 180. BETTER PARKING AREAS.  
MORE SNOWPLAY SIGNS ABOUT SNOWPLAY AREAS.  
MORE TABLES & CHAIRS, WAITERS. CATER TO PEOPLE SPECTATING-MANY PARENTS SITTING & WATCHING.  
NEED A RESTROOM FACILITY AT FT TUTHILL  
NEED MORE/BETTER SIGNAGE, MORE PARKING  
NEED SNACK BAR AT CROWLEY PIT  
NICE AREA. BETTER THAN PARKS.  
NICE CONCESSION STAND, GOOD TO HAVE RESTROOMS. PET FRIENDLY A PLUS.  
NICE PLACE TO PLAY  
NICE SETUP, GOOD SCENERY, GOOD DISTANCE  
NO COMPLAINTS, LOVE IT UP HERE.  
NO IN TOWN SIGNS TO PLAY AREA. AREA IS TERRIFIC, LOVE BONFIRES, MORE BUMPS, SNOW TOO ICY, GOOD TO HAVE TOILETS.  
OVERALL IS GOOD  
PARKING LOT IS ICY-USE SALT. PEOPLE HIT OTHERS ON THE SLEDDING HILLS-USE LANES?  
PART DAY NAT'L PARK FEES  
PAVED ROAD WOULD BE NICE  
PET WASTE CONTROLS, PET PICK-UP BAGS  
PETS NOT BEING CLEANED UP AFTER BEHIND HILL  
PICNIC TABLES W/CHAIRS-SMOOTHER ROAD-BETTER RESTROOMS AT CROWLEY  
PLEASED WITH PLACE. NICE TO HAVE LEGITIMATE AREA.  
PLOW PARKING LOT..A LOT OF SNOW  
POTHoles ON 180  
PRAY FOR SNOW  
PRETTY COOL SLEDDING AREA!  
PRETTY GOOD  
REALLY ENJOY IT. AWESOME. PEOPLE ARE FRIENDLY.

REALLY KID FRIENDLY, EXCEED EXPECTATION  
REGULAR BATHROOMS WOULD BE NICE (OR JUST HAND SANITIZER)  
ROPE OFF SLEDDING AREAS FOR SAFETY. STATION ATTENDANT ON TOP OF HILL WARNING KIDS THAT ARE GOING TO GET HIT.  
ROPE TOW NEEDED  
ROPE TOW NEEDED  
SERVICES ARE AWESOME, BATHROOMS, CONCESSIONS, MORE FOOD (WARM) TO EAT (BURGERS/DOGS) KIDS LOVE THE SNOW CAT. LIKE  
HAVING STAFF HERE TO HELP.  
SHOULD SERVE BEER @ SNOWPLAY. BIGGER HILLS, LODGE.  
SHUTTLE FROM FLAG TO HERE, ALSO FROM LOT TO PLAY AREA, HELP FOR GETTING TO TOP (TOW ROPE), COLOR CODING HILL AREAS TO  
BETTER IDENTIFY SECTIONS.  
SHUTTLE FROM LOT TO PLAY AREA  
SIGN BY HUMPHREYS RD FOR SNOWPLAY AREAS, ROPE TO HOLD ON TO/RAIL FOR WALKWAYS, BUNNY HILL FOR SNOWBOARDING  
SIGN FOR WING MOUNTAIN NOT VISIBLE. POTHoles AT ENTRANCE TO CROWLEY PIT WERE ISSUE.  
SIGN PRIOR TO PEAK VIEW PARKING AREA INDICATING SNOWPLAY AREAS.  
SIGNAGE WAS GOOD, ROADS CLEAR  
SIGNS IN TOWN-MAKE IT EASIER TO FIND  
SKI AREA NEEDS ALPINE SLIDE FOR SUMMER MONTHS  
SLED PRICE HIGH, GOOD HILLS  
SLED PRICES A BIT STEEP, NEED DEBIT/CREDIT CARDS  
SLED RENTAL  
SLEDS ARE EXPENSIVE  
SLIPPERY CONDITIONS GETTING BACK UP HILL, PEOPLE ARE FALLING  
SNOW GEAR IS HARD TO FIND. DON'T LIKE HOW YOU CAN'T LEAVE AND COME BACK.  
SNOWBOARD LEARNING AREA  
STORES ARE OUT OF SNOW BOOTS!  
SUPER DUPER FUN  
SUV SPUN OUT ON WAY IN TO WING MTN-CINDER THE ROAD INTO WING MTN.  
TALLER HILLS  
THE RESTROOM WAS EXTREMELY FILTY  
THIS IS A REALLY FUN TRIP.  
THIS IS A VERY MEMORABLE & FUN EXPERIENCE. WOULD LIKE TO COME UP MORE OFTEN.  
TOW ROPES

TRAFFIC & MANAGEMENT IS VERY GOOD  
TRAFFIC IN TOWN IS BAD-OTHER THAN THAT EVERYTHING IS GREAT  
TRAFFIC WAS BACKED UP SEVERAL MILES ON HWY 89A BETWEEN FLAGSTAFF AND SEDONA DUE TO AN ACCIDENT. IF ACCIDENTS OCCUR IN  
SNOWY CONDITIONS POLICE NEED TO KEEP TRAFFIC FLOWING.  
TRAFFIC WAS RIDICULOUS  
VERY FUN TRIP  
VERY GOOD LOCATION  
VERY GOOD TIME.  
VERY HELPFUL @ CONCESSION STAND, CHEAPER SLEDS  
VERY ORGANIZED. LIKE IT.  
WALKWAYS ARE SLIPPERY. CONGESTED TRAFFIC ON SLEDDING HILLS, BUT HAS IMPROVED A LOT.  
WE LOVE FLAGSTAFF. I WANT TO LIVE HERE.  
WELL MAINTAINED-GREAT FOR SNOWPLAY  
WILL WANT TO COME BACK NEXT YEAR.  
WORK ON TRAFFIC IN TOWN

**APPENDIX B:**

**Regional Economic Impacts of Wing Mountain Fee Area & Dispersed  
Snowplay Visitors on Coconino County**

## **Introduction**

The survey of snowplay visitors to the Wing Mountain fee area asked respondents to detail their regional expenditures in each of the following categories: lodging/camping, restaurant and bar, groceries, transportation (including gas), shopping/gear/clothing purchases, recreation/entrance/permit fees, and miscellaneous other expenditures. These expenditures from Flagstaff area visitors were entered into the Input-Output model IMPact analysis for PLANing (IMPLAN) and economic impacts and multiplier effects were calculated for Coconino County, Arizona. Economic impact analysis (EIA) measures the direct and extended effects of expenditures related to a tourist activity by detailing industry response and multiplier effects on many regional economic indicators such as output, income, and employment. Understanding the regional economic impacts of visitors can illustrate the economic importance of tourism and recreational activities to Northern Arizona and the Flagstaff area, and can be compared to the impacts of other activities.

## **Economic Impact Analysis Methods**

Input-Output (I-O) models are an important tool used in assessing the economic impacts of specific activities. The I-O model incorporates transaction tables to keep track of inter-industry sales and purchases, as well as exogenous sectors of final demand such as households, government, and foreign trade. The name, "I-O Model," is a result of each industrial sector in the model being both a buyer and a seller of inputs and outputs.

The I-O model can be used to conduct economic impact analysis. Economic impact analysis involves applying a final demand change to the economic I-O model, and then analyzing the resulting changes in the economy (IMPLAN Analysis Guide, 1999). Impacts can be one-time impacts, such as the construction of a new factory, or they can be recurring impacts, such as the arrival of a new industry. Often, the impact analysis is concerned with multiplier effects, or the amount of money that is re-circulated through the economy after an initial expenditure.

Visitors were asked to estimate daily trip expenditures in the categories listed above. The visitors are assumed to be concentrated in the Flagstaff area which is located entirely within Coconino County, Arizona. Visitors from outside of the region purchased regional lodging, food, transportation, entertainment, etc., and this importation of expenditures represents an influx of "new" expenditures to the region. This analysis does not include respondents who live in Coconino County as they do not represent "new" output to the region because it is assumed that regional residents would have allocated those expenditures to industrial sectors within the county anyway.

Direct, indirect, and induced effects of visitor expenditures were calculated for the Coconino County region. The direct effects of expenditures capture the amount of purchases made by participants in each industrial category. Commodity purchases

contributing to direct effects need to be margined to effectively allocate economic impacts. For example, many commodities available in Coconino County were not necessarily manufactured within the county (e.g. gasoline, souvenirs, etc.). By margining commodities, producer and purchaser prices are separated. IMPLAN uses regional purchasing coefficients (RPCs) to estimate gross regional trade flows (gross exports and imports), and incorporates the RPCs into the allocation of direct effects attributable to the defined study area. A regional purchasing coefficient represents the proportion of the total demands for a given commodity that is supplied by the region to itself (IMPLAN Analysis Guide, 1999).

Indirect effects are a measure of economic activity in other industrial sectors that is spurred by the direct effects. For example, Flagstaff area visitors provided an economic boost to local food/beverage and lodging sectors (a direct effect). These hotels and restaurants require a number of inputs from other industries such as utilities, bulk food and beverage ingredients, and equipment. Indirect effects are the increased economic activity in these other industrial sectors caused by additional hotel and restaurant patrons.

Induced effects are an estimate of increased economic activity resulting from wages and income attributed to the direct effects. Staying with the previous example, a portion of wages earned by workers in the food/beverage and lodging sectors are then locally re-spent in other industrial sectors. IMPLAN uses Personal Consumption Expenditures (PCEs) to model induced effects. PCEs provide estimates of consumer expenditures on goods and services by different income classes (IMPLAN Analysis Guide, 1999).

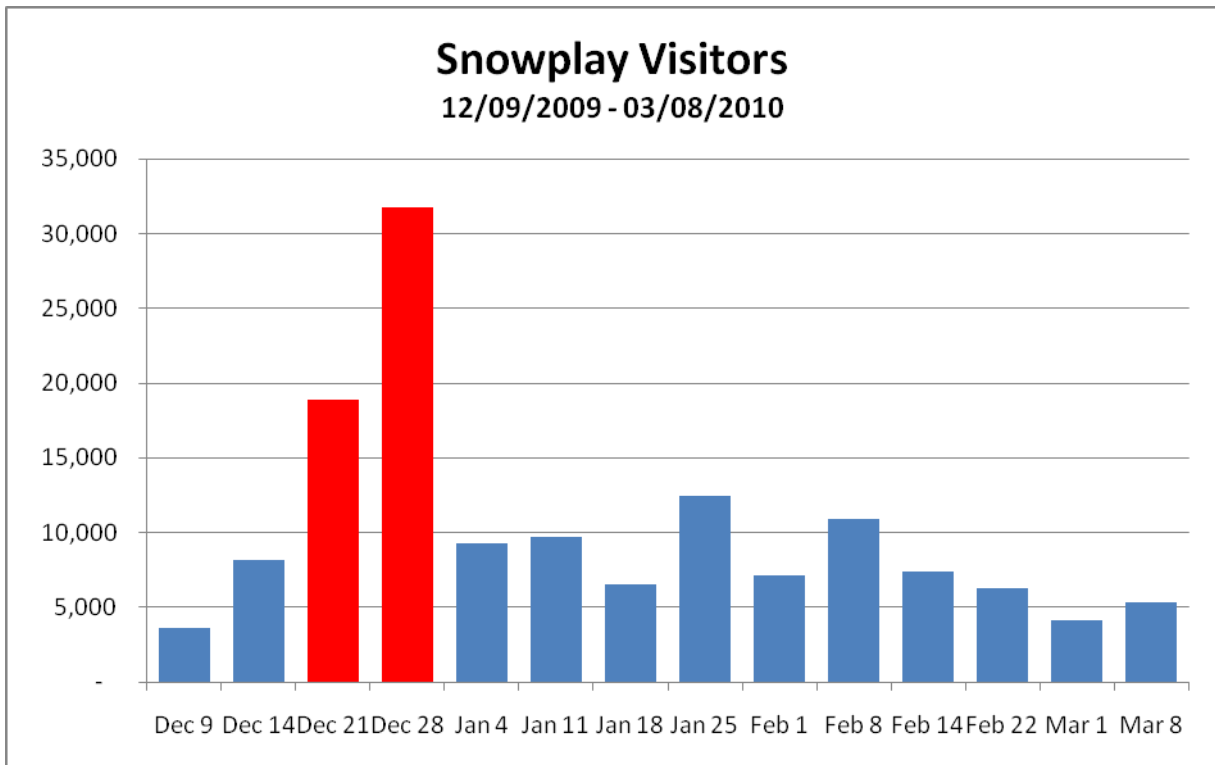
### **Regional Expenditure Results – Wing Mountain Snowplay Area**

For the economic analysis, each survey represents a travel party in the Flagstaff area to participate in snowplay activities. This analysis focuses on the economic impact of snowplay visitors to the Flagstaff area who went to the official Wing Mountain Fee Area. This analysis will concern itself with developing total expenditures for fee area visitors. The first step in developing regional expenditure estimates is to determine the number of visitors over the study period who were in Flagstaff for snowplay activities. It is assumed that all visitors to the Wing Mountain fee area were there for the purposes of snowplay. The management of Wing Mountain Fee Area provided weekly car counts. The counts varied by week depending on the weather, the time of the week (weekday or weekend) or holiday (Christmas break, MLK day). Weekly car counts were multiplied by the average party size for the specific weeks derived from survey data to develop weekly estimates of visitors. See Table B1 and Figure B1.

**Table B1. Estimate of Visitors to Wing Mountain fee area.**

Week of:	# Cars	Average Party Size	Estimate of Snowplay Visitors
Dec 9	624	5.8	3,643
Dec 14	1,487	5.5	8,166
Dec 21	3,526	5.4	18,919
Dec 28	5,710	5.6	31,784
Jan 4	1,663	5.6	9,313
Jan 11	1,734	5.6	9,710
Jan 18	1,167	5.6	6,535
Jan 25	2,150	5.8	12,455
Feb 1	1,248	5.7	7,149
Feb 8	2,096	5.2	10,908
Feb 14	1,481	5.0	7,360
Feb 22	962	6.5	6,261
Mar 1	675	6.1	4,129
Mar 8	970	5.5	5,319
<b>Total</b>	<b>25,493</b>	<b>5.6</b>	<b>141,652</b>

**Figure B1. Snowplay visitor estimates for Wing Mountain Fee Area**



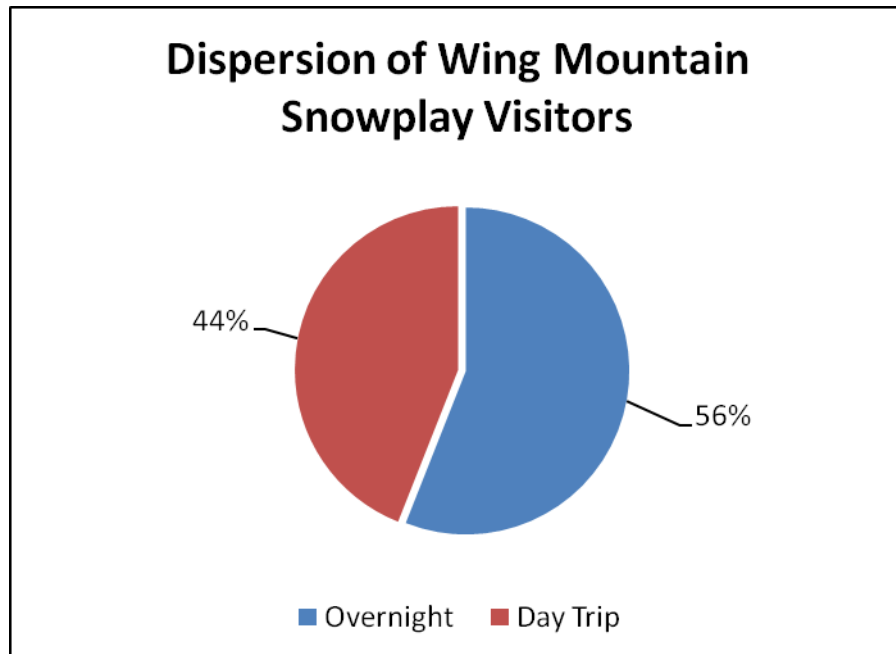
Expenditure questions asked respondents to estimate their expenditures for the travel party, i.e., each survey comprised one group or party. To estimate the number of visitors to the Wing Mountain fee area a population estimate was developed to use in expanding per-party expenditures to all potential visitors. It is estimated that approximately 141,652 people visited Wing Mountain in the 2009-2010 season (during the survey period). Only out-of-county visitors are included in this analysis. Only 3.1 percent of Wing Mountain visitors (5,142) were from the Flagstaff area, defined as a 50-mile radius of the City of Flagstaff. Therefore, 136,510 out-of-region visitors are included in the economic impact analysis. The harmonic mean was used for average expenditures in calculating economic impact. The trimmed mean avoids extremes at either end of a frequency distribution by effectively reducing the top and bottom 5 percent of the distribution and recalculating the mean. This reduces the extreme end of the range lessening the impact of those who had no expenses as well as those who had expenses that were considered unreasonable (i.e., \$500 for lodging for one night).

Answers from non-local survey respondents were totaled for each expenditure category and were averaged to represent the mean expenditures for each out-of-town visitor. The totals from each expenditure category were entered into the operationalized Input-Output model IMPLAN. Visitor expenditures entered into IMPLAN's Impact Analysis require bridging from survey expenditure categories into IMPLAN industry sectors. Most survey expenditure categories link directly to IMPLAN industry sectors (e.g., "Grocery Store Purchases" directly corresponds with IMPLAN sector #405 "Food and Beverage Stores"). Only one survey expenditure category, "Transportation," was allocated to multiple IMPLAN industrial sectors. Because the "Transportation" survey question asked participants to include gas, oil, and auto expenses, the overall expenditures were allocated to sector #326 "Retail Store - Gasoline Stations" (85%) and to sector #414 "Automotive Repair and Maintenance" (15%).

A majority of the snowplay visitors stayed overnight in Flagstaff (56%). Those visitors who stayed overnight, stayed an average of 1.6 nights. The remainder (44%) was classified as day visitors and they stayed an average of 7 hours in the Flagstaff area. Therefore, 76,446 or 56 percent of the total visitors to Wing Mountain are used to estimate the overnight visitor expenditures. The remainder, 60,064 visitors, comprise the day visitors. Day visitor expenditures are calculated separately from overnight visitors as day visitors do not have lodging or camping expenditures. Total expenditures are then developed by summing the expenditures for both overnight and day visitors. These expenditures are then included in the county economic impact.



Figure B2. Day and Overnight Visitors to Wing Mountain Fee Area



Direct expenditures are expanded to the population estimate to arrive at total expenditures by the following method. Using the lodging-camping expenditures as an example, the per-party average expenditures for the lodging and camping sector are expanded in the following manner. Per-party per-day lodging and camping expenditures of \$124.8, are divided by the average party size of overnight visitors (5.4 persons) to arrive at average per-person per-day expenditures (\$38.16), which in turn are multiplied by the average trip length of 1.6 nights to yield average per-person per-trip expenditures. A majority of overnight visitors (83.1%) had lodging and camping expenditures. Therefore, 83.1 percent of the population estimate (76,446 overnight visitors) is then multiplied by average per-person per-trip expenditures on lodging and camping (\$38.16) to yield an estimated \$2,424,717 spent by overnight visitors on lodging. All other categories are calculated in the same way.

In the case of day visitors the average length of trip is assumed to be one day and therefore per-person per-day expenditures are exactly the same as per-person-per-trip expenditures. Table B2, illustrates visitor expenditures by category for overnight visitors while Table B3 illustrates visitor expenditures by category for day visitors. Table B4 concludes with total expenditures for both overnight and day visitors to the Wing Mountain snowplay areas. These total expenditures are used for the subsequent economic impact analysis.

**Table B2. Estimate of regional expenditures by overnight snowplay visitors to Wing Mountain.**

Overnight	Per Party Per-Day	Per Person Per-Day	Per Person Per- Trip	Valid %	Population	Total Expenditure
Lodging-Camping	\$124.8	\$23.27	\$38.16	83.1%	63,543	\$2,424,717
Restaurant & Bar	\$89.2	\$16.63	\$27.27	94.1%	71,930	\$1,961,395
Groceries	\$57.8	\$10.78	\$17.67	40.9%	31,288	\$552,828
Transportation (including gas)	\$41.7	\$7.77	\$12.74	85.7%	65,479	\$834,339
Shopping-Gear-Clothing	\$46.7	\$8.70	\$14.27	54.4%	41,610	\$593,819
Recreation-Entrance- Permit Fees	\$12.2	\$2.28	\$3.74	75.1%	57,415	\$214,599
Other expenditures	\$82.4	\$15.37	\$25.20	10.1%	7,741	\$195,046
<b>Total</b>	<b>\$454.7</b>	<b>\$84.8</b>	<b>\$139.0</b>			<b>\$6,776,742</b>

**Table B3. Estimate of regional expenditures by day trip snowplay visitors to Wing Mountain.**

Day-Trip	Per Party Per-Day	Per Person Per-Day	Valid %	Population	Expenditure
Lodging-Camping	\$0.0	\$0.00	0%	0	\$0
Restaurant & Bar	\$70.2	\$12.3	80%	47,988	\$590,490
Groceries	\$35.7	\$6.3	22%	13,030	\$81,460
Transportation (including gas)	\$53.1	\$9.3	77%	46,399	\$431,578
Shopping-Gear-Clothing	\$48.3	\$8.5	47%	27,966	\$236,753
Recreation-Entrance-Permit Fees	\$12.7	\$2.2	71%	42,585	\$94,879
Other expenditures	\$10.0	\$1.8	1%	318	\$557
<b>Total Day Trip Expenditures</b>	<b>\$230.0</b>	<b>\$40.3</b>			<b>\$1,435,717</b>

**Table B4. Estimate of total regional expenditures for snowplay visitors to Wing Mountain.**

Fee Area Wing Mountain	Total Expenditure
Lodging-Camping	\$2,424,717
Restaurant & Bar	\$2,551,884
Groceries	\$634,288
Transportation (including gas)	\$1,265,917
Shopping-Gear-Clothing	\$830,572
Recreation-Entrance-Permit Fees	\$309,478
Other expenditures	\$195,603
Total	\$8,212,459

## Regional Expenditure Results – Dispersed Recreation Visitors

This analysis focuses on the economic impact of dispersed snowplay visitors to the Flagstaff area, which includes those visitors who did *not* go to the official Wing Mountain Fee Area. This estimate is based on a sample of 129 visitor parties surveyed during the study period at various sites on the Coconino National Forest (at Crowley Pit, Walker Lake and Peak View located on Hwy 180), and at Fort Tuthill, which is a county park. It is important to remember that the data on dispersed recreation visitors was collected to provide a comparison to Wing Mountain and not for the purposes of developing an economic impact. Also, dispersed visitors were only surveyed at sites of convenience and might not be representative of all dispersed visitors throughout the I-17 and Hwy 180 corridors. However, the direct expenditures they reported during their visits compare favorably with those reported by Wing Mountain visitors, supporting higher confidence in these numbers.

The next step in developing regional expenditure estimates is to determine the number of dispersed snowplay visitors on the I-17 and Hwy 180 corridors during the study period who were in the area for snowplay activities. For this estimate, the AHRRC received an estimate of dispersed visitors developed by the US Forest Service Peaks Ranger District. The Forest Service estimated that there were between 49,000 and 63,000 visitors on the I-17 and Hwy 180 corridors during the survey period. In order to develop a spending estimate for dispersed recreation the mid-point of the range (56,000 visitors) was used, which is a conservative estimate of dispersed visitors. Average expenditures for both day and overnight visitors, obtained from the surveys of dispersed visitors, were then expanded to this population estimate. This calculation of the direct spending of dispersed snowplay visitors, both day and overnight, produced a further \$2,978,513 of direct expenditures in the Coconino County economy.

A majority of the dispersed snowplay visitors (54.2%) stayed overnight in Flagstaff. Those visitors who did stay overnight, stayed an average of 1.6 nights. The remainder (45.8%) was classified as day visitors and they stayed an average of 6.5 hours in the Flagstaff area. Therefore, 30,333 overnight visitors (54% of the total dispersed visitors) were used to estimate the overnight visitor expenditures. The remainder, 25,667 visitors, comprised the day visitor portion. Day visitor expenditures are calculated separately from overnight visitors as day visitors do not have lodging or camping expenditures. Total direct expenditures are then developed by summing the expenditures for both overnight and day visitors, which could then be included in the county economic impact. See Figure B2.

Figure B3. Day and Overnight Visitors to Wing Mountain Fee Area



Direct expenditures are expanded to the population estimate to arrive at total expenditures by the following method. Using the lodging-camping expenditures as an example, the per-party average expenditures for the lodging and camping sector are expanded in the following manner. Per-party per-day lodging and camping expenditures of \$113.5, are divided by the average party size of overnight visitors (5.4 persons) to arrive at average per-person per-day expenditures, which in turn are multiplied by the average trip length of 1.6 nights to yield average per-person per-trip expenditures. A majority of overnight visitors (87.7%) had lodging and camping expenditures. Therefore, 87.7 percent of the population estimate (26,600 overnight visitors) is then multiplied by average per-person per-trip expenditures on lodging and camping (\$34.54) to yield an estimated \$918,859 spent by overnight visitors on lodging. All other categories are calculated the same way. In the case of day visitors the average length of trip is assumed to be one (1.0) day and therefore per-person per-day expenditures are exactly the same as per-person-per-trip expenditures.

Table B5, illustrates visitor expenditures by category for overnight visitors while Table B6 illustrates visitor expenditures by category for day visitors. Table B7 concludes with total expenditures for both overnight and day visitors to dispersed recreation snowplay areas. These total expenditures are used for the subsequent economic impact analysis.

**Table B5. Estimate of regional expenditures by Overnight snowplay visitors to dispersed recreation sites.**

Overnight	Per Party Per-Day	Per Person Per-Day	Per Person Per-Trip	Valid %	Population	Expenditure
Lodging-Camping	\$113.5	\$21.07	\$34.54	88%	26,600	\$918,859
Restaurant & Bar	\$86.0	\$15.96	\$26.18	91%	27,533	\$720,713
Groceries	\$31.5	\$5.84	\$9.58	45%	13,533	\$129,683
Transportation (including gas)	\$52.6	\$9.76	\$16.00	80%	24,267	\$388,338
Shopping-Gear-Clothing	\$87.9	\$16.32	\$26.77	52%	15,867	\$424,701
Recreation-Entrance-Permit Fees	\$27.7	\$5.14	\$8.42	15%	4,667	\$39,303
Other expenditures	\$45.0	\$8.35	\$13.70	3%	910	\$40,950
	\$444.2	\$82.4	\$135.19			\$2,662,546

**Table B6. Estimate of regional expenditures by Day-trip snowplay visitors to dispersed recreation sites.**

Day-Trip	Per Party Per-Day	Per Person Per-Day	Per Person Per-Trip	Valid %	Population	Expenditure
Lodging-Camping	\$0.0	\$0.00	\$0.00	0.0%	0	\$0.00
Restaurant & Bar	\$44.0	\$6.77	\$6.77	77.2%	19,813	\$134,118
Groceries	\$16.0	\$2.46	\$2.46	28.1%	7,205	\$17,735
Transportation (including gas)	\$38.0	\$5.85	\$5.85	67.7%	17,111	\$100,034
Shopping-Gear-Clothing	\$30.0	\$4.62	\$4.62	52.6%	13,509	\$62,348
Recreation-Entrance-Permit Fees	\$5.0	\$0.77	\$0.77	8.8%	2,251	\$1,732
Other expenditures	\$0.0	\$0.00	\$0.00	0.0%	0	\$0.00
	\$133.0	\$20.5	\$20.5			\$315,967

**Table B7. Estimate of total regional expenditures for snowplay visitors to dispersed recreation sites.**

Dispersed Recreation Snowplay Visitors	Total Expenditures
Lodging-Camping	\$918,859
Restaurant & Bar	\$854,831
Groceries	\$147,417
Transportation (including gas)	\$488,372
Shopping-Gear-Clothing	\$487,049
Recreation-Entrance-Permit Fees	\$41,034
Other expenditures	\$40,950
	\$2,978,513

## Regional Economic Impact of Snowplay Analysis Results

The total number of out-of-region visitors to the Flagstaff area in the study period was 136,510 visitors at Wing Mountain Fee Area and 56,000 dispersed snowplay visitors . These visitors were responsible for some \$11.2 million of expenditures in Coconino County, AZ, with an average regional expenditure of \$455 per party for overnight visitors to Wing Mountain and \$444 for dispersed overnight visitors. Expenditures recorded for each industrial category were entered into IMPLAN’s impact analysis.

Table B8 shows the direct, indirect, and induced effects of regional expenditures made by non-local visitors. Type SAM multipliers are presented for each of the economic impact categories. Type SAM multipliers are similar to Type III multipliers in that they represent the ratio of total effects to direct effects and include indirect and induced effects. They are also similar in incorporating employment-based Personal Consumption Expenditures (PCEs) to model overall induced effects. IMPLAN’s Type SAM multipliers differ from traditional multipliers because IMPLAN uses all social accounting matrix information to generate a model that captures the inter-institutional transfers (IMPLAN Analysis Guide, 1999).

**Table B8. Effects<sup>1</sup> and Multipliers of \$11,190,972 of Regional Expenditures by snowplay visitors to Wing Mountain and Dispersed Sites.**

<b>Economic Impacts</b>	<b>Direct Effects</b>	<b>Indirect Effects</b>	<b>Induced Effects</b>	<b>Type SAM Multipliers</b>	<b>Total</b>
Total Output	\$11,190,972	\$2,400,268	\$2,627,140	1.45	<b>\$16,218,380</b>
Total Employment (FTE jobs)	175.6	20.4	25.3	1.3	<b>221.3</b>
Total Labor Income <sup>2</sup>	\$4,145,740	\$875,804	\$900,141	1.43	<b>\$5,921,685</b>
Indirect Business Taxes <sup>3</sup>	\$1,092,318	\$100,878	\$166,842		<b>\$1,360,038</b>

<sup>1</sup>Effects are presented in 2007 dollars.

<sup>2</sup>Total labor includes employee compensation and proprietor income.

<sup>3</sup>Indirect business taxes include excise taxes, property taxes, fees, licenses, and sales tax paid by businesses.

If regional expenditures are substantial, increased tax revenues will be generated. These tax revenues can also be substantial, particularly in tourism and service-oriented industries, where additional tax collections occur. As seen in Table B7, visitors to the Flagstaff area spurred an additional \$1.3 million of tax revenue within Coconino County. Much of this money is re-invested into infrastructure and community needs that further



support tourism and recreation industries. The majority of tax revenue coming from Flagstaff area visitors is the result of sales tax paid to restaurants, hotels, and retail stores. Other fee and excise taxes are common in sectors such as lodging and Food and Beverage sectors.

### **Discussion**

In 2009-2010 snowplay visitors to Wing Mountain fee area and dispersed recreation sites on the Coconino National Forest injected significant output to businesses in the regional economy of Flagstaff and Coconino County. Approximately \$11.2 million of direct regional purchases were made by out-of-region visitors, contributing to a total economic output of \$16.2 million for Coconino County. This economic activity supported some 221 full-time equivalent (FTE) jobs. The total economic impact of snowplay visitors to the Wing Mountain fee area and dispersed recreation sites to the Flagstaff area and to Coconino County is therefore substantial, and contributes significantly to the greater regional economy.

## **APPENDIX C**

### **Survey Form**

## Flagstaff Winter Snowplay Areas Visitor Survey 2009-2010

- Weather:**  
 Sunny/clear  
 Overcast  
 Snowing/precipitation

**1. Date:**   -   -      
Month Day Year

- 2. Location:**  Wing Mountain  Walker Lake (Hwy 180)  
 Flagstaff Nordic Center  Fort Tuthill  
 Crowley (Hwy 180)  Other:

**Interviewer:** Verify that respondent is at least 18 years of age if there is any doubt.

Welcome to Flagstaff. You have been randomly selected to participate in a visitor survey. To thank you for participating, we will give you a free beverage coupon/magnet. Do you have a few minutes to respond to these questions? Your answers are totally anonymous and will help us understand your visit to Flagstaff and how we can improve services to you.

- 3. Gender of Participant**  Male  Female
- 4. Are you from the Flagstaff area (within 50 miles of Flagstaff, including Parks, Williams, & Winslow) or, do you own a second home in the Flagstaff area?**  Yes  No
- 5. Including yourself, how many adults, 18 years and older, and children are in your party today?**

# of Adults   # of Children

- 6. Are you with family, friends, people you work with or an organized group?**  
 Family & Friends  Friends Only  Visiting Alone  Organized Group (club, church, tour group etc.)  
 Family Only  People I work with  Other:

- 7. What is your age? Please stop me at the correct category.**  
 18-29 years  40-49 years  60-69 years  80 years or more  
 30-39 years  50-59 years  70-79 years  Refused

- 8. What is your annual household income before taxes? Please stop me at the correct category.**  
 Under \$25,000  \$75,000 - 100,000 (\$99,999)  Over \$150,000  
 \$25,000 - 50,000 (\$49,999)  \$100,000 - 125,000 (\$124,999)  Refused  
 \$50,000 - 75,000 (\$74,999)  \$125,000 - 150,000 (\$149,999)

**If from the Flagstaff Area:** Thank you for taking the time to complete this survey.

**If from outside of the Flagstaff Area:** Continue

- 9. Where did you hear about or get information on Flagstaff's snowplay areas? Mark all that apply.**

Family & Friends  Newspaper/magazine  Visitor Center/Gov't Office  
 Radio/TV  Website/online  Other (list):

- 10. On a scale of 1 to 10 where one is Low and ten is High, please indicate your overall satisfaction with:**

	1	2	3	4	5	6	7	8	9	10
Locating snowplay areas & signage to areas	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Flagstaff area road conditions (taking into acct weather)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Traffic conditions in traveling to snowplay areas	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Parking availability & conditions at snowplay areas	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Your current snowplay/sledding experience	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Your overall experience visiting Flagstaff this trip	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

1135236742

11. What is the ZIP code of your permanent residence?

If not from the U.S., what is your country of origin?

12. Is snowplay in Flagstaff the primary reason for this visit?  Yes  No ..... If no, what is the primary reason?

13. Is this your first visit to Flagstaff that includes snowplay?  Yes  No

14. If No, how often do you typically come to Flagstaff in the winter season for snowplay?

15. How many times have you visited Flagstaff in the past 12 months?

16. How much time, in total, will you spend in Flagstaff on this trip?  Day Trip Only  Overnight Trip

If a **day trip only**, how many hours:

If **staying overnight**, how many nights:

17. What type of overnight lodging are you using on this trip?  Other, define:

Hotel/Motel  Vacation Rental (condo, timeshare)  
 Bed & Breakfast  Home of Friends/Family  
 Hostel  Campground/RV Park

18. What is the average nightly room rate of the lodging where you are staying in Flagstaff?

Under \$50/night  \$76 - \$100 per night  \$126 - \$150/ night  Don't know/Not sure yet  
 \$50 - \$75/ night  \$101 - \$125/ night  Over \$150/night

19. Please estimate as closely as possible the amount of money that your **travel party** is spending per day in Flagstaff for the following categories. ( in U.S. dollars with NO decimal places. Example 92 not 92.00)

Please tell us the number of people these expenses cover.

Lodging/camping \$

Shopping/Gear/Clothing \$

Restaurant & bar \$

Recreation/Entrance/Permit fees \$

Groceries \$

Other ..... \$

Transportation (incl gas) \$

Define Other:

20. While staying in Flagstaff, what other sites, attractions or events do you plan to see? Read list if necessary. Mark all that apply.

- |  |   |  |
|--|---|--|
| <input type="radio"/> Arizona Snowbowl                     | <input type="radio"/> Lowell Observatory                    | <input type="radio"/> Sunset Crater Volcano NM |
| <input type="radio"/> Coconino Center for the Arts         | <input type="radio"/> Museum of Northern Arizona            | <input type="radio"/> Walnut Canyon NM         |
| <input type="radio"/> Downtown Flagstaff (Heritage Square) | <input type="radio"/> Events at Northern Arizona University | <input type="radio"/> Wupatki NM               |
| <input type="radio"/> Flagstaff Nordic Center              | <input type="radio"/> Pine Cone Drop (New Years)            | <input type="radio"/> Don't Know               |
| <input type="radio"/> Flagstaff Winterfest                 | <input type="radio"/> Riordan Mansion State Historic Park   | <input type="radio"/> Other                    |
| <input type="radio"/> Grand Canyon National Park           | <input type="radio"/> Shopping                              | <input type="text"/>                           |

Comments:

Thank you very much for participating in this survey.  
Have a great rest of the day in Flagstaff!

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