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# Visiting Page/Lake Powell: An Economic Analysis of the Page-Area Tourism Cluster

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# I Introduction

The Governor's Strategic Partnership for Economic Development has identified 12 industry clusters in Arizona that collectively drive the economy. The term "cluster" refers to a geographic concentration of interdependent companies, suppliers, products, labor pool, and institutions that together constitute an important competitive advantage for a region. Tourism is recognized as one of Arizona's 12 industry clusters. In northern Arizona it ranks as the dominant cluster.

Much of the analysis in this report is based on the concept that industry clusters act as primary growth influences on local economies. Strong clusters produce goods or services that can be sold to consumers outside the region, creating a flow of revenue into the region. This influx of revenue stimulates economic activity in other areas of the local economy such as the retail, real estate, or construction sectors.

This report profiles the tourism cluster in Coconino County with special focus on the Page area. It examines the cluster's composition, relative size, and importance to the regional economy, and it addresses the cluster's dynamics and requirements for growth. In its conclusion, it presents a menu of options for strengthening the cluster in the Page area. It was inspired by an earlier analysis of the Flagstaff, Arizona tourism cluster, and is based on the latest available economic data as well as primary and secondary research.

# II The Tourism Cluster in Page and Coconino County

## A—Overview

Page is a city of over 8,500 residents in north-central Coconino County. Situated near the Utah border and adjacent to both Lake Powell and the Navajo Indian Reservation, the city enjoys access to a region of enormous natural, cultural, and archaeological resources that fuel an active tourism economy.

The biggest attraction in the region is Grand Canyon National Park, a world-renowned natural wonder that attracts up to 5 million visitors per year and has headquarters approximately 70 miles by air southwest of Page. The main attraction for the immediate Page area, however, is Lake Powell, a national recreation area that spans two states and draws an estimated three million visitors annually, most of whom come for water tour, houseboat, fishing, and water recreation activities.

Among Page's many distinctions is the fact that it occupies the exact center of the "Grand Circle," a popular red rock tour route that includes several national parks, monuments, Indian reservations, and other attractions in Arizona, New Mexico, Colorado, and Utah. In addition, other parts of Coconino County are known for their high peaks, cool pine forests, winter snow recreation, and vast open spaces.

Travel-related businesses in Page benefit from a steady flow of customers due to the city's remoteness from other population centers and location along U.S. Highway 89, a main artery for passage through north central Arizona into Utah's canyon country. Tourists on their way from one major Southwestern attraction to another find Page a convenient stopping place for services such as fuel, food, and lodging. Those visiting Lake Powell often spend a night or two in Page, since the lake's busiest marina is located just a few miles away.

While the Page city limits do contain a few tourist attractions—including a historical museum and seasonal special events—the city's most desirable assets from a business viewpoint are the nearby public lands and their scenic marvels. Consequently, most private sector tourism businesses have been built on providing visitors with supplies and services, not the attractions themselves. The challenge for the Page tourism industry is not so much to increase prime-time visitation to the city—it is already near capacity during peak seasons—but to generate more revenue from those who are already in town. In addition, increased visitation during "shoulder" and off seasons would soften the steep revenue decline during winter.

## B—Tourism Cluster Size and Growth in Coconino County

The extent and nature of tourism cluster activity in Coconino County and the City of Page were appraised by means of an economic base study that was conducted using the latest available sectorally detailed data (1997 by county and 1996 by ZIP code) as defined by the federal government's Standard Industrial Classification (SIC). Based on cluster definitions used in Arizona and the results of the economic study, 14 SIC sectors plus the federal government have been included in the tourism cluster for Coconino County and Page. (See Appendix A for more details on methodology.)

**Components of Coconino County's Tourism Cluster**

14 SIC sectors plus the federal government comprise the tourism cluster in Coconino County.

- Large Sectors
  - Eating and drinking places
  - Lodging places (hotels, motels, camps, recreational vehicle parks, and other types of lodging)
  - Federal government (National Park Service, U.S. Forest Service, and other federal operations)
- Medium Sectors
  - Gasoline service stations
  - Miscellaneous amusement and recreation services (boat rentals, golf, downhill skiing and other amusements)
  - Gift and souvenir shops
  - Marinas
  - Passenger transit: taxicabs and bus charter services
- Small Sectors
  - Arrangement of passenger transportation (travel agencies and tour operators)
  - Vehicle rental
  - Museums, galleries, gardens
  - Linen supply
  - Scheduled air transportation
  - Water transportation of passengers
- Very Small Sectors
  - Motion picture production

In several sectors, tourism was responsible for only a portion of the total economic activity, but the sector was included in the cluster because its unusual size was a direct result of tourism. For example, most federal government activities are unrelated to tourism, but the large number of National Park Service and Forest Service sites in Coconino County largely account for the area's attractiveness to tourists. Another example is that all cities have gasoline service stations and restaurants, but the high number of these establishments in the county can be attributed to the extra demand caused by tourism.

Among the findings of the economic base study:

- **Tourism is the leading economic activity in Coconino County**. Clusters are considered the most important growth engines of the economy, and among all clusters in Coconino County tourism is dominant, accounting for 83 percent of total cluster employment. While about half of the county's 1997 employment occurred in sectors not included in any recognized cluster, few of these sectors had a concentration greater than the national average.

  *Note: Industry concentration is determined from the "location quotient," which compares the local employment-to-population ratio to the national ratio. A location quotient greater than the national average of 1.0 suggests that an unusually high percentage of a cluster's goods and services may be purchased by residents not living in the local area.*

- **Tourism is the most highly concentrated cluster in the county except for bioindustry.** While bioindustry is actively present in the Flagstaff area, it consists primarily of one large company and is technically not a complete cluster.

Table 1
**Cluster Employment in Coconino County, 1997**

| Cluster | Employment | Location Quotient* |
|---|---|---|
| Tourism | 14,373 | 2.2 |
| Bioindustry | 1,125 | 5.4 |
| Agriculture and Food Processing | 849 | 0.3 |
| Transportation and Distribution | 695 | 0.6 |
| Business Services (Call Centers only) | 115 | 0.2 |
| Plastics and Advanced Composite Materials | 78 | 0.2 |
| High Technology (Aerospace & Information) | 60 | 0.1 |
| Software | 23 | 0.0 |
| Minerals and Mining | 5 | 0.0 |
| Optics | ** | ** |
| Senior Living | ** | ** |
| Environmental Technology | ** | ** |
| Total, All Clusters | 17,383 | — |
| Total in All Industries | 35,139 | 0.8 |

* Location Quotient: Shows the concentration of cluster employment relative to the national average (1.0) for that cluster.
**These clusters cannot be analyzed by SIC because data are not available.

Source: Calculated from U.S. Bureau of the Census, *County Business Patterns*, Arizona and United States, 1997; and U.S. Bureau of Economic Analysis data.

- **Among all counties in Arizona, Coconino County ranks second only to La Paz County on measures of tourism cluster importance.** La Paz County's tourism cluster is slightly more concentrated than Coconino County's, but its tourism employment is only one-eighth that of Coconino County. La Paz also ranks as less of a tourist destination than Coconino County because it largely serves pass-through traffic on the interstate highway.

- **Coconino and La Paz counties both have per capita tourism employment far above that of any other Arizona county.** Location quotients for tourism in Coconino and La Paz counties are nearly one point higher than for any other county in the state. In Coconino County, tourism employment accounted for one-third of total private-sector employment, while in most other counties tourism employment was one-fifth of total employment.

Table 2
**Tourism Cluster Concentration by County, 1997**

| County | Location Quotient* | Tourism Cluster Employment** | County | Location Quotient* | Tourism Cluster Employment** |
|---|---|---|---|---|---|
| La Paz | 2.3 | 1,600 | Yuma | 0.9 | 5,300 |
| Coconino | 2.2 | 11,600 | Cochise | 0.8 | 4,100 |
| Maricopa | 1.3 | 164,400 | Navajo | 0.7 | 3,200 |
| Pima | 1.1 | 39,500 | Pinal | 0.6 | 4,000 |
| Yavapai | 1.1 | 7,400 | Apache | 0.6 | 2,000 |
| Gila | 1.1 | 2,500 | Graham | 0.5 | 800 |
| Mohave | 1.0 | 6,100 | Greenlee | 0.5 | 200 |
| Santa Cruz | 1.0 | 1,800 | | | |

* Location Quotient: Shows the concentration of cluster employment relative to the national average (1.0) for that cluster.
** All figures exclude federal government.

Source: Calculated from U.S. Bureau of the Census, *County Business Patterns*, Arizona and United States, 1997.

- **Total tourism employment in Coconino County is significant and growing steadily.** Including federal government, more than 14,000 people were employed in the tourism cluster in Coconino County in 1997. Between 1991 and 1997, tourism cluster employment rose 33 percent, keeping pace with the county's overall employment growth of 32 percent during the same period.

- **Cluster employment is concentrated in three sectors—eating and drinking places, lodging places, and the federal government.** Together, these three sectors accounted for 81 percent of total cluster employment in 1997. By sector, eating and drinking places accounted for 37 percent of the cluster's 1997 total, lodging places accounted for 25 percent, and the federal government accounted for 19 percent. Among these three, only federal government showed a decline in employment.

- **Tourism cluster employment is highly concentrated compared to the rest of the nation.** Employment in Coconino County's tourism cluster in 1997 was more than two times greater per capita than the national average, accounting for approximately 7,900 more tourism workers than would be expected in a county of this size were it not for the high concentration of tourist attractions.

Table 3
**Tourism Cluster Employment by Sector in Coconino County**

| SIC | Description | Sector Employment 1997 | % Change 1991-1997 | Location Quotient* |
|---|---|---|---|---|
| 58 | Eating & Drinking Places | 5,332 | 24% | 1.7 |
| 70 | Lodging Places | 3,632 | 65% | 5.0 |
| NA | Federal Government | 2,750 | -11% | 2.3 |
| 799 (part) | Miscellaneous Amusement & Recreation Services | 850 | 421% | 3.5 |
| 554 | Gasoline Service Stations | 547 | -3% | 1.8 |
| 5947 | Gift & Souvenir Shops | 397 | 151% | 4.5 |
| 4493 | Marinas | 240 | ** | 25.3 |
| 41 (part) | Passenger Transit: Taxicabs and Bus Charter Service | 238 | ** | 9.5 |
| 751 | Vehicle Rental | 98 | 5% | 1.4 |
| 84 | Museums, Galleries, Gardens | 72 | -28% | 1.9 |
| 472 | Arrangement of Passenger Transportation | 68 | 5% | 0.7 |
| 7213 | Linen Supply | 67 | 81% | 3.0 |
| 451 | Scheduled Air Transportation | 41 | -24% | 0.2 |
| 448 | Water Transportation of Passengers | 34 | 278% | 3.1 |
| 781 | Motion Picture Production | 7 | ** | 0.1 |
| | Cluster Total | 14,373 | 33% | 2.2 |

*Location Quotient: Shows the concentration of cluster employment relative to the national average (1.0) for that cluster.
** Greater than 1,000 percent.

Source: Calculated from U.S. Bureau of the Census, *County Business Patterns*, Arizona and United States, 1991 and 1997; and U.S. Bureau of Economic Analysis data.

- **Tourism wages are relatively low but rising faster than the rest of the county.** Of the seven cluster sectors for which 1997 data are available, six paid less than the county's overall average wage of $17,600. (National average: $27,800.) These six include the cluster's two largest sectors: eating and drinking places, and lodging places. In five of the seven sectors, however, tourism wages in Coconino County increased faster than the national average between 1991 and 1997, and also faster than the rest of the county. For example, lodging wages increased 41 percent while county-wide and national wages increased only about 8 percent on an inflation-adjusted basis.

  *Note: These figures and those cited in the remainder of this report exclude the federal government sector due to a lack of reported data.*

Table 4

**Tourism Cluster Payroll per Employee in Coconino County, 1997**

| SIC | Description | Payroll Per Employee Coconino County 1997 | % of National Average | 1991-97 Real % Change in Payroll per Employee |
|---|---|---|---|---|
| 84 | Museums, Galleries, Gardens | $19,500 | 105% | 21% |
| 751 | Vehicle Rental | $16,800 | 72% | 72% |
| 70 | Lodging Places | $13,000 | 84% | 41% |
| 554 | Gasoline Service Stations | $12,600 | 103% | 26% |
| 5947 | Gift and Souvenir Shops | $ 9,700 | 105% | -5% |
| 7999 | Miscellaneous Amusement & Recreation Services | $ 8,900 | 62% | -18% |
| 58 | Eating and Drinking Places | $ 7,500 | 84% | 22% |
| — | Coconino County (excludes federal government) | $17,600 | 63% | 8% |

Note: Data for other cluster sectors not available.

Source: Calculated from U.S. Bureau of the Census, *County Business Patterns*, Arizona, 1991 and 1997.

- **Productivity varies among the cluster's sectors.** Sales per employee were slightly above the national average in 1997 in the accommodation (lodging places) sector and well above average in the amusement, gambling, and recreation sector. In the other three tourism sectors for which data were available, sales per employee were below average.

Table 5

**Tourism Cluster Productivity in Coconino County, 1997**

| NAICS* | Description | Sales Per Employee | % of National Average |
|---|---|---|---|
| 447 | Gasoline Stations | $179,000 | 83% |
| 5321 | Automotive Equipment Rental and Leasing | $ 92,600 | 51% |
| 713 | Amusement, Gambling, and Recreation | $ 75,300 | 140% |
| 721 | Accommodation (Lodging Places) | $ 60,400 | 104% |
| 722 (part) | Food Services and Drinking Places (Eating and Drinking Places) | $ 28,700 | 90% |

*North American Industry Classification System, which gradually is replacing the Standard Industrial Classification (SIC).
Note: Data for other cluster sectors not available.

Source: Calculated from U.S. Bureau of the Census, Economic Censuses, Arizona, 1997.

- **Establishment size in the tourism cluster is relatively high.** Compared to Coconino County overall, the tourism cluster had relatively many establishments employing between 20 and 99 people, and relatively few employing less than 10. The average number of employees in the tourism cluster in 1997 was more than 16.4 compared to the overall Coconino County figure of less than 10.5.

Table 6

**Distribution of Coconino County Establishments by Size, 1997**

| Number of Employees | Tourism Cluster | Total County |
|---|---|---|
| 1 to 4 | 40% | 54% |
| 5 to 9 | 19% | 21% |
| 10 to 19 | 19% | 13% |
| 20 to 99 | 21% | 10% |
| 100 or more | 1% | 1% |

Note: Excludes federal government.

Source: Calculated from U.S. Bureau of the Census, *County Business Patterns*, Arizona, 1997.

- **The number of establishments in the tourism cluster has risen faster than the county average.** Tourism establishments increased by 55 percent between 1991 and 1997, a larger amount than the overall county increase of 41 percent. The average number of tourism employees per establishment dropped 3 percent in the same time period, slightly less than the decline county-wide.

Table 7
**Tourism Cluster Establishment Number and Size, 1997**

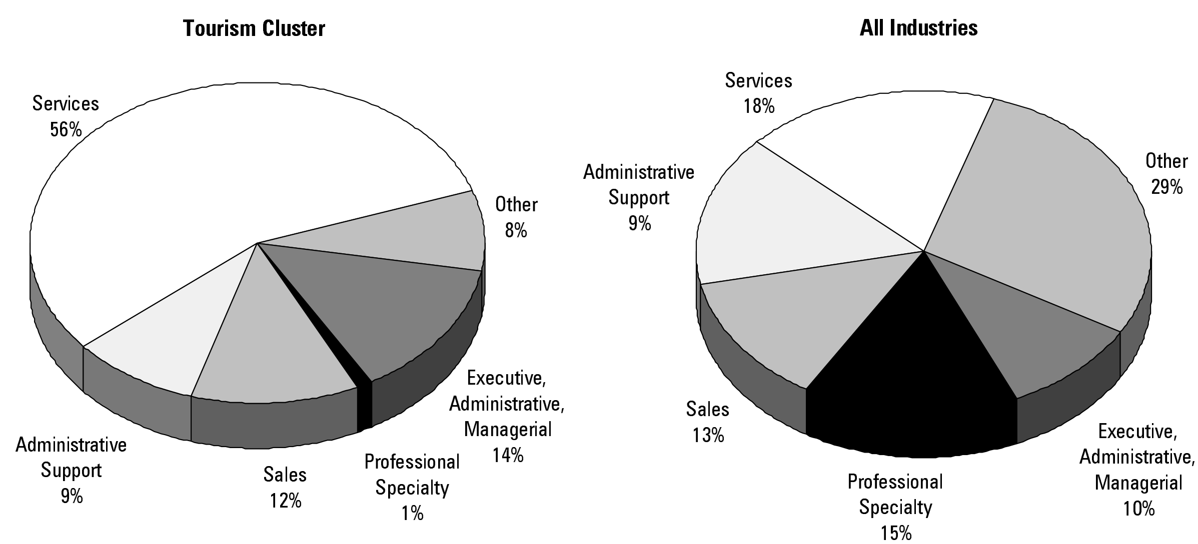
| Number of Establishments | % Change Number of Establishments 1991-97 | Average Employees per Establishment | % Change Employees per Establishment 1991-97 |
|---|---|---|---|
| 709 | 55% | 16.4 | -3% |

Note: Excludes federal government.

Source: Calculated from U.S. Bureau of the Census, *County Business Patterns*, Arizona, 1991 and 1997.

- **The occupational mix in the tourism cluster is heavily weighted toward services.** In Coconino and Yavapai counties (the only source of data combines the two counties), services accounted for 56 percent of total cluster employment in 1989. This is four times as much as any other occupational sector in the cluster, and three times the services weighting for all industries in the two counties.

Figure 1
**Occupational Composition of Tourism Cluster—Coconino and Yavapai Counties, 1989**




Note: Excludes federal government.

Source: Calculated from U.S. Bureau of the Census, 1990 decennial census.

## C—Tourism in Page

Economic data are not readily available by city, but some are available by ZIP code. For this study, the Page area was approximated by ZIP code 86040.

- **Tourism leads all economic activity in Page.** Clusters are considered the most important growth engines of the economy, and among all clusters tourism accounted for 98 percent of employment in the Page area, compared to 76 percent in the Flagstaff area and 82 percent countywide. Among all industries, tourism accounted for nearly one-half of all employment in Page, compared to one-quarter in Flagstaff and not quite one-third in Coconino County.

Table 8
**Cluster Employment in the Page Area, 1996***

| | Page Area | Flagstaff Area | Coconino County |
|---|---|---|---|
| Tourism (excluding federal government) | 1,416 | 6,314 | 10,590 |
| Total of All Clusters (except the farm portion of agriculture and food processing | 1,448 | 8,350 | 12,899 |
| Total Employment of All Industries | 2,980 | 24,210 | 34,645 |

*Estimated

Source: Calculated from U.S. Bureau of the Census, *County Business Patterns*, Arizona, 1996, and *Zip Code Business Patterns*, Arizona, 1996.

- **The tourism cluster is highly concentrated in Page.** Tourism concentration in Page is almost four times greater than the national average. Concentrations are particularly high in sectors related to Lake Powell, such as marinas (153.9 times the national average) and water transport (42.0 times the national average).

- **Two tourism sectors are especially important in Page.** Together, eating and drinking places and lodging places accounted for nearly one-half of all tourism-related establishments in Page and two-thirds of the city's tourism-related employment. The two sectors also accounted for almost one-third of all workers in Page across all industries.

Table 9

**Tourism Cluster by Sector, Page Area, 1996**

| SIC | Description | Establishments | Employment* | Location Quotient |
|---|---|---|---|---|
| 58 | Eating and Drinking Places | 33 | 508 | 2.2 |
| 70 | Lodging Places | 18 | 427 | 8.6 |
| 799 (part) | Miscellaneous Amusement and Recreation Services | 7 | 168 | 16.9 |
| 4493 | Marinas | 15 | 101 | 153.9 |
| 554 | Gasoline Service Stations | 13 | 77 | 3.5 |
| 451 | Scheduled Air Transportation | 1 | 67 | 3.5 |
| 448 | Water Transportation of Passengers | 1 | 31 | 42.0 |
| 5947 | Gift and Souvenir Shops | 7 | 23 | 3.8 |
| 472 | Arrangement of Passenger Transportation | 3 | 10 | 1.5 |
| 751 | Vehicle Rental | 1 | 2 | 0.4 |
| 84 | Museums, Galleries, Gardens | 1 | 2 | 0.8 |
| 41 (part) | Passenger Transit | 0 | 0 | 0.0 |
| 7213 | Linen Supply | 0 | 0 | 0.0 |
| 781 | Motion Picture Production | 0 | 0 | 0.0 |
| - | Total for Cluster | 100 | 1,416 | 3.9 |

Note: Excludes federal government.
*Estimated

Source: Calculated from U.S. Bureau of the Census, *Zip Code Business Patterns*, Arizona, 1996.

- **Tourism contributes a substantial share of city sales tax revenues, and that share is rising.** Tourism's two largest sectors, lodging and eating and drinking places (as defined by Arizona Department of Revenue), contributed 30 percent of total sales tax revenues collected by the City of Page in fiscal year 1999. From 1995 to 1999, the total amount of sales tax generated by these two sectors increased 17 percent, more than four times the increase in total sales tax collections for Page. Sales taxes include all bed, board, and beverage taxes. Data for other sectors were not available.

Table 10
**Page Sales Tax Revenue Comparisons, FY 1995-99**

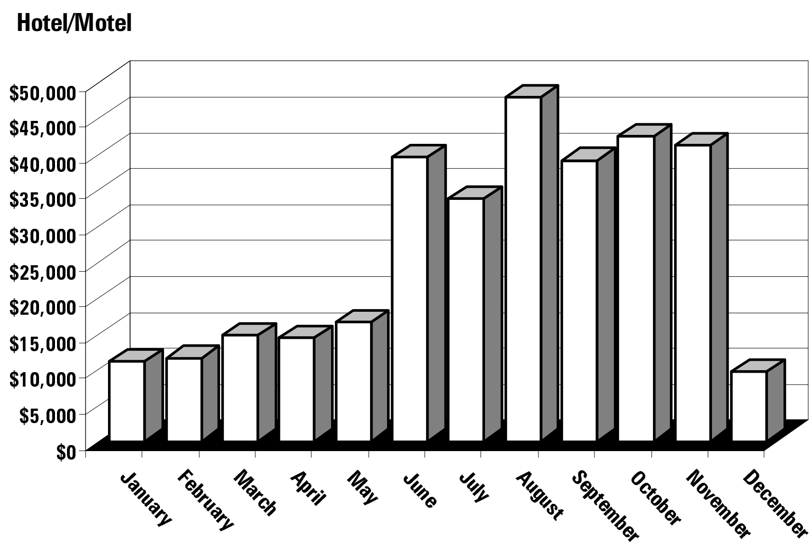
| Fiscal Year | Hotel/ Motel | Restaurant/ Bar | Combined Hotel-Restaurant | Page Total Sales Taxes | Percent Sales Taxes from Hotels-Restaurants |
|---|---|---|---|---|---|
| 1995 | $309,078 | $517,575 | $826,653 | $3,146,702 | 26% |
| 1996 | $336,914 | $523,739 | $860,653 | $3,150,708 | 27% |
| 1997 | $345,670 | $590,131 | $935,801 | $3,419,598 | 27% |
| 1998 | $354,962 | $595,666 | $950,628 | $3,248,052 | 29% |
| 1999 | $334,565 | $633,142 | $967,707 | $3,271,362 | 30% |

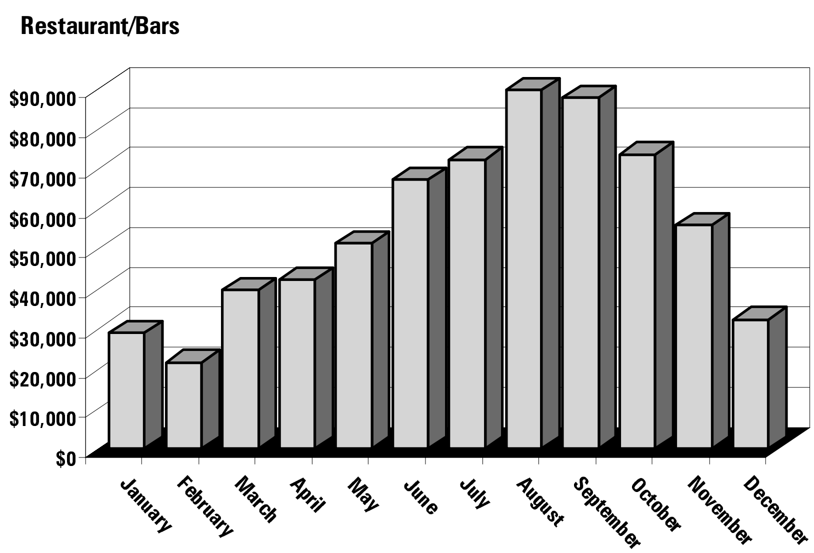
Note: Data for other cluster sectors not available.

Source: Calculated from data supplied by Arizona Department of Revenue.

- **Tourism is highly seasonal in Page.** Sales tax revenues generated by tourism's two largest sectors generally peak between June and November, then bottom between December and May. In their strongest months of 1999 (August), lodging places generated almost five times as much sales tax revenue as in their weakest month (December), while eating and drinking places generated more than four times as much as their weakest month (February).

Figure 2
**Monthly Sales Tax Collection, 1999**



- **Retail sales follow tourism's seasonal trends.** During the six-month period of 1999, June through November, tax revenues from retail sales were more than 50 percent higher than during the six month period, December through May. This pattern closely follows the seasonal tax revenue pattern for tourism.

Table 11
**Seasonal Impact on Retail Sales Taxes**

| | Seasonal Retail Sales Tax Collections 1999 | | | |
|---|---|---|---|---|
| | **Off Season** (December-May) | **High Season** (June-November) | **Difference** | **Percent Change** |
| 6-Month Total | $860,492 | $1,297,391 | $436,899 | 51% |
| Monthly Average | $143,415 | $ 216,232 | $ 72,817 | 51% |

Source: Calculated from data supplied by Arizona Department of Revenue

## D—Relationships Among Cluster Components

Industry clusters usually develop complex interconnecting relationships that include various levels: material suppliers, service providers, manufacturers, and retailers, among others. Tourism, however, tends to display a flatter relationship profile due to its tendency toward direct contact between a tourism company and the end-consumer. Trade organizations usually offer the greatest opportunity for joint ventures and networking.

The Page tourism cluster appears to have a relatively large percentage of establishments involved in some form of inter-business relationship, due in part to the small town environment in which people connect informally in the course of day-to-day living. While at present these relationships do not constitute major sources of revenue for most individual operations, they hold the potential for more profitable ventures in the future. Among the most common types of relationships:

- **Large and small businesses engage in a number of small-scale cooperative efforts and joint ventures.** Many businesses work together to make client referrals, most often among the marina, hotels, airline, and scenic tour operators. Several businesses are considering joint marketing or promotional partnerships with other businesses in the area. Even among competing businesses, a degree of cooperation is the norm—for example most hotels, when full, routinely refer customers to other lodging establishments.

- **Most businesses have working relationships with area institutions.** For example, some business-oriented organizations and activities, such as the Chamber of Commerce and certain special events, receive primary funding from city-allocated tax revenues. Business leaders and the city have been working with Arizona Department of Transportation and others to upgrade traffic flow through shopping and commercial areas for both cars and pedestrians. Business organizations work with local media to promote tourism events and tourism awareness. Some businesses and their employees make use of the continuing education opportunities available through the community college. Hotels and restaurants hire students involved in the hotel-restaurant management courses of study offered by the community college and NAU. The Chamber and Powell Museum book tours and make referrals to area businesses. Several businesses act as concessionaires on National Park Service land. Instructors from businesses and institutions teach classes related to tourism at the community college.

- **Some promising connections have been made with the Navajo Nation.** Partnership efforts are underway to fund training for Navajo workers in a variety of skill areas, including hotel and restaurant management and aviation. Some tour operators act as concessionaires on Navajo land.

- **Business organizations play a key role in focusing promotional efforts—and they provide a forum for networking among businesses and institutions.** Involvement in Chamber of Commerce activities puts business leaders in touch with each other, which facilitates business alliances. The Tourism Board, Tourism Awareness Committee, Main Street Committee, and other local groups have promoted projects that benefit the tourism industry. Regional marketing cooperatives and state tourism offices/economic development agencies in Arizona, Utah, and Nevada have assisted many businesses in improving services and/or attracting clients.

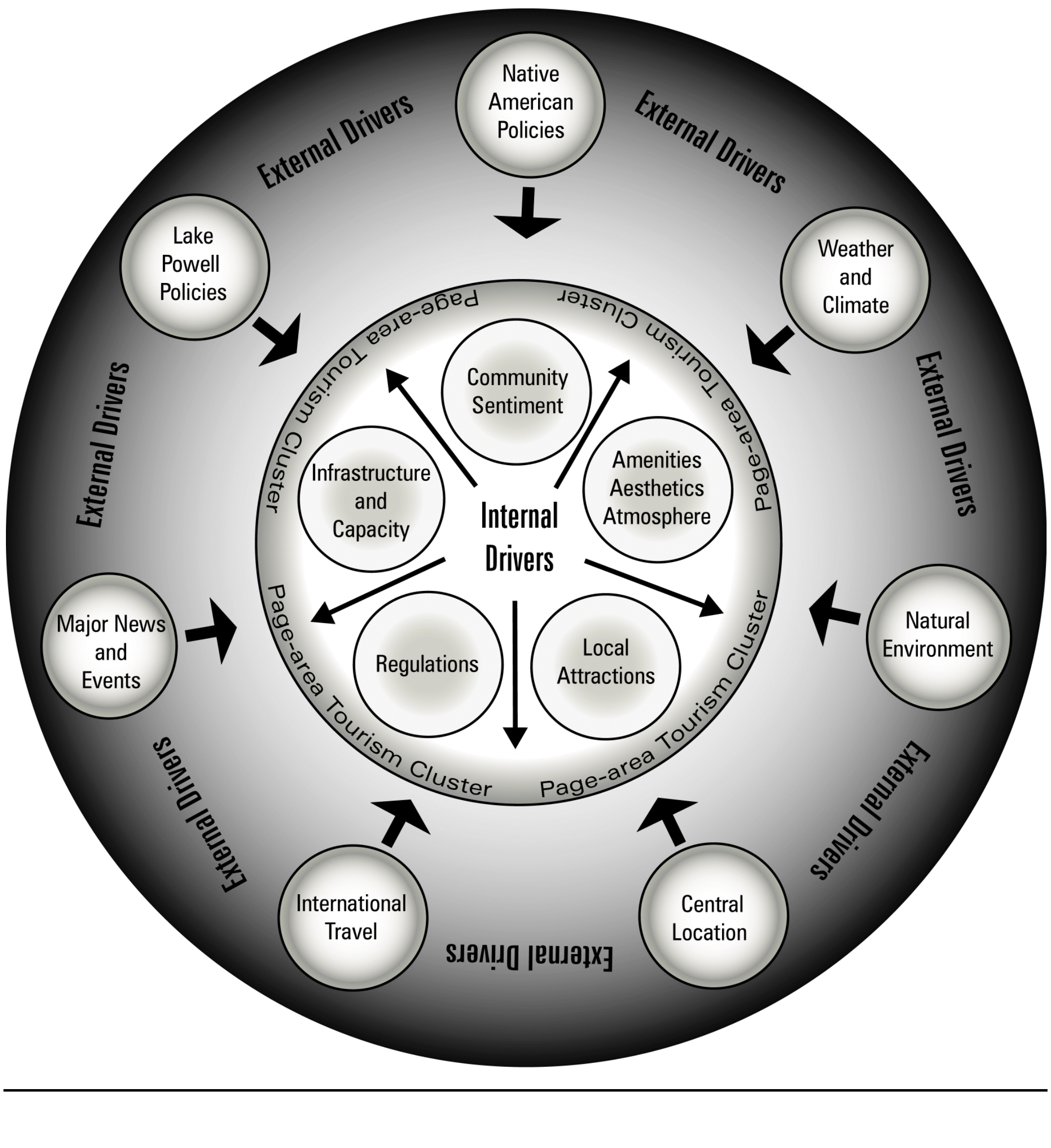
- **Many businesses use local suppliers when possible.** Page has limited retail and service options and larger corporate entities tend to use their buying power to obtain core supplies at bulk discounts. Nevertheless, many businesses try to purchase at least some of their consumables and services locally. These include goods such as office supplies and food, and certain services such as mechanical repairs, printing, remodeling, cleaning, and laundry.

- **Many informal connections occur among business members and civic leaders.** A small town environment encourages residents to get involved in civic activities where they wear a number of different hats. This provides additional opportunities for business leaders to meet each other in informal, non-competitive settings.

# III Dynamics of the Page-Area Tourism Cluster

The Page tourism industry relies on a fortuitous location to sell its services. It benefits from a mild climate, pristine environment, access to Native American culture, and the distinctive ambiance of Colorado Plateau canyon country. These and many other factors act as economic "drivers"—external and internal forces that have the potential to affect how, where, and how much the tourism industry can grow. External drivers include resources, trends, and events that lie mostly beyond the control of the local community, while internal drivers include assets, actions, and resources that are primarily within the community's sphere of influence. In addition to the push and pull of economic drivers, Page also faces perpetual competition from other destinations that might lure visitors away.

**Figure 3**
**Forces Affecting the Page-Area Tourism Cluster**



## A—External Drivers

Page tourism businesses rely on many outside attractions to lure potential clients. Therefore, the industry is vulnerable to many unpredictable factors that remain outside their control. Among them are:

- **Lake Powell Policies.** Changes in policies regulating the access, use, or quality of Lake Powell could have a substantial impact on the way local tourism establishments do business. These changes could be positive overall, negative overall, or a mixed bag—altering patterns of service in a manner that favors some sectors and harms others. While Park Service policy decisions lie largely outside the realm of the local tourism industry, they can be influenced through participation in the planning process.

- **Weather/Climate.** The Page-Lake Powell area benefits from reasonably dry and mild conditions during most of the tourist season, but outdoor attractions are always subject to the vagaries of weather conditions. Prolonged, severe storms or long-term climate changes could affect tourist activity and revenue.

- **Natural Environment.** One of the selling points of the Page area is its wide-open spaces and pristine environment. Threats within this driver could occur due to inappropriate development, degradation of popular attractions, or overcrowding.

- **Central Location.** Even without promotional efforts, people would stop in Page because of its convenient location at the junction of a major highway artery and Lake Powell. Improvements to the roadway, such as widening and resurfacing, would improve safety and convenience for motorists and could increase visitation from domestic travelers. Deterioration of the highway could have the opposite effect, particularly if an increase in highway accidents caused highway closures that disrupted or discouraged the flow of visitors.

- **Native American Policies and Infrastructure**. Native American culture exerts a considerable attraction for visitors. Major changes to the regulation, access, or development of Navajo or Hopi cultural sites could either open new opportunities for tourism growth or close off existing markets.

- **International Travel.** Lake Powell and the American Southwest are powerful draws for foreign travelers, most notably from Europe and Asia. Variations in currency valuations, international economies, world tourism trends, perceptions of safety or treatment of foreign tourists in the region, and the scheduling of major sporting events can alter patterns of visitation.

- **Major News and Events.** The American Southwest may have become famous for gunslingers and Indian warriors, but it is now noted as a place that is safe and friendly to travelers. Consequently, visitors head out into the wide-open spaces fully expecting people and conditions to treat them kindly. Bad news such as civil unrest, violence, infectious disease, or environmental catastrophe could have a chilling effect on visitation. On the other hand, news of hidden treasure, spiritual sites, rare animals, or therapeutic substances in the area could lead to increased demand for visitor services.

### B—Internal Drivers

- **Community Sentiment.** Tourism dominates the Page economy, employing half of all workers and providing enormous tax revenues for the city. With such a large presence for tourism, it is difficult to imagine a Page family that does not benefit from its economic contributions, whether through direct or indirect income, government services, health care, retail and dining opportunities, arts and cultural exposure, public amenities, or other services. When such benefits are widely recognized, they can improve local sentiment toward visitors and create a welcoming feeling in town. If the benefits seem to be outweighed by drawbacks associated with tourism—overcrowding, traffic problems, inappropriate development, rapid growth, infrastructure shortcomings, or low wages—community sentiment can turn against the industry and create a hostile atmosphere for visitors.

- **Amenities/Aesthetics/Atmosphere.** While visitors come to Page primarily for Lake Powell and other regional experiences, they may stay longer or return sooner if the experience in town provides what they need to make a vacation pleasantly memorable—for example, interesting walks, regionally-oriented shopping, pleasant views, friendly encounters, fresh air, nice parks, child-oriented activities, evening entertainment, safe streets, and good food. Threats to the tourist economy can occur when local offerings or aesthetics don't live up to visitor expectations.

- **Local Attractions.** A diverse offering of local attractions and activities can lure visitors back to town once they are "done" with Lake Powell, while a lack of engaging activities may allow visitors to move on and forget where they spent the night. Page currently possesses a limited inventory of visitor "musts," but local businesses may be able to draw on their unique surroundings to develop new ideas and markets.

- **Regulations.** The best municipal business regulations are usually simple, clear, and streamlined so decisions can be made quickly and fairly. Poorly thought out regulations can stifle economic growth, or imperil the quality of life for local residents. Either can be a threat to the overall health of the tourism industry.

- **Infrastructure and Capacity.** In order for a city to manage an influx of visitors, the local infrastructure—lodging, food service, utilities, transportation—must have the capacity to sustain high peak loads. It must also be able to accommodate future growth because new trends in tourism can stretch capacities in unforseen ways. For example many travelers now want to plan and book their travel via the internet. Others want to stay "connected" as much as possible while on vacation. This requires increased bandwidth and improved telecommunication service in remote areas. Lack of capacity in any one area of the infrastructure can affect all aspects of the industry.

### C—Competitors

Page's remote and isolated location works to its advantage by keeping competitors far away. Nevertheless, travelers have many choices when they make their vacation/leisure plans. Among the destinations that can draw visitor dollars away from Page are the following:

- **Other gateways in the region.** Moab, Kanab, Williams, Flagstaff, Kayenta, and other cities provide visitor services and access to big-name regional attractions. Each has advantages and disadvantages compared to the others in terms of pricing, amenities, transportation, and proximity to tourist draws, but none of these occupies as vital of a geographic position as Page.

- **Other big sports lakes in the region.** Lake Mead, Lake Havasu, and other huge reservoirs provide attractions similar to Lake Powell, and some are closer to large population centers. Few, however, can compare to Lake Powell in terms of scenic value, remoteness, and adventure experience.

- **Grand Canyon/Tusayan.** The region's biggest attraction can easily overshadow Lake Powell and surrounding areas, but it can also draw visitors into the region. If, after traveling from far away, these Grand Canyon visitors decide to make time to see more of the region, they will likely find their way to Page.

- **Las Vegas.** Gambling casinos and aggressive marketing bring in visitors at an enormous rate. Once in town, they have Las Vegas tour operators available to provide them with access to some of the same attractions claimed by Page. This could work to local advantage if Page positioned itself as a destination instead of a detour for these Las Vegas-originated tours.

### D—Requirements for Tourism Cluster Vitality

Most tourism leaders say they want business to be more productive during the high season. They also want it to be more robust during the shoulder and off seasons. To accomplish this, they have identified a number of requirements for maintaining and improving the health of the tourism industry in the Page area. Among their needs are the following:

- ***Upgraded worker skills.*** Some types of skills are hard to find, particularly in technical fields and computer-related services.

- ***Improved customer service.*** Not all workers understand how to treat the public.

- ***Stronger community support***. Tourism is a benefit to the city and its residents, but it is underappreciated. Neither is it fully appreciated by Navajos who could take advantage of tourism growth in the Page area.

- ***Easier access to financing.*** Traditional business lending is extremely limited in the area, particularly for Navajo entrepreneurs.

- ***Widening of U.S. Highway 89.*** Four lanes are needed to improve safety and traffic flow.

- ***More robust air service.*** The airport is outstanding, but air service is expensive and difficult to maintain.

- ***Better telecommunication service.*** More bandwidth and faster installation is imperative.

- ***More activities for visitors, particularly in the evening.*** Tourists walk around town after dinner with nothing to do and nowhere to go.

- ***Extended/evening business hours and more dining opportunities.*** Prime time for shopping is 7 p.m. to 10 p.m., but many tourists with money in their pockets have trouble finding stores open.

- ***Better signs and information, particularly for foreign speakers.*** Newcomers have trouble finding their way around in Page. When they don't understand English, the problem is even greater.

- ***More cooperation and partnerships within the business community.*** There's enough business for everyone. Working together can generate more.

- ***Better visitor access to Navajo and Hopi culture***. International and eastern U.S. travelers want to experience authentic Native American culture, but opportunities are limited.

# IV Opportunities for Action

Page area leaders should consider the following strategies to strengthen the tourism cluster and position it for the future. Not every strategy is likely to be feasible at any given time, nor is every suggestion necessary to keep the industry healthy. It is recommended that initiatives be prioritized based on active local support. Then top priorities should be matched to willing "champions" who can provide leadership and oversight in accomplishing each goal.

## A—Collaborative Strategies

- **Invest in the community.** A truly great town for living is usually a great place to visit. By concentrating long-term efforts and city revenues on making Page the best it can be for residents, everybody will benefit: visitors will want to stay longer and return sooner; locals will want to improve and protect basic town values; new businesses will want to locate in the area, diversifying the economy; and public revenues will increase. Among the strategies suggested for improving the Page community: create bigger, better parks; build an outdoor amphitheater for public performances and to serve as a town center; hire an events coordinator and/or parks and recreation director to professionally plan events and activities; improve pedestrian/bicycle access to and from commercial areas; develop a variety of lake and scenic overlooks around town; improve and expand the telecommunications infrastructure and associated services; work closely with planners to support Highway 89 improvements; expand services and activities for children.

- **Make Page fun.** Most towns in the immediate region—southern Utah, northwestern New Mexico, and northern Arizona—aren't what most tourists would consider a lot of "fun." They are quiet and safe, but virtually locked up in the evening. By creating an exciting roster of things to do in or near town—easy day trips, entertainment, shopping, night life, kids' activities—Page could distinguish itself from the competition and jump far ahead as a prime overnight destination. This would position the city not only as a "must" stop for every tour, but also as a good layover spot for travelers with more flexible time lines. Among the suggested items that might liven up Page are: more annual events and festivals, live music and street entertainment, expanded evening shopping opportunities, self-guided walking tours, wider sidewalks and a pedestrian-friendly atmosphere, an international cultural center to provide visitors with a comprehensive source of maps, information, educational/ interpretive materials, and referral/reservation services.

- **Promote tourism's benefits to the community**. When it comes to the question, "What has tourism done for me lately," many people have short attention spans and even shorter memories. Tourism leaders need to continually remind residents of tourism's many contributions, both historically and on into the future. This must be a long-term marketing and educational campaign that targets all the residents of the entire town, not the least of which are business people and their workers. The effort must be fact-based. It will require the cooperation of both public and private entities. It should involve all avenues of communication including news articles and commentaries, public award ceremonies, commemorations and plaques honoring past accomplishments, and constant dialogue with residents and civic leaders through informal discussions. For greater impact, it should be expanded to include nearby Navajo communities and destinations through partnership with interests such as the Navajo Nation Division of Economic Development and the Salt River Project.

- **Make tourism a model for clean industry everywhere.** Every town talks about wanting to attract "clean" industry. Few industries have the potential to be cleaner than tourism. To fulfill that potential, re-examine tourism practices with an eye to upgrading those that are not as culturally or environmentally sensitive as they might be. Areas where tourism might regularly monitor its performance include: efficient use of limited resources such as water, power, and sewage treatment; cooperation with city government to plan better traffic patterns; sensitivity to basic community values regarding aesthetics, scenic views, night sky visibility, and a sense of peacefulness in town; education of visitors about proper behaviors regarding antiquities, fragile environments, noise-making, and encountering different cultures.

- **Focus on customer service**. Page has a head start in making customer service both a priority and a selling point for the community. The Page campus of Coconino Community College, in partnership with Northern Arizona University's prestigious School of Hotel and Restaurant Management, already offers courses of study focused on customer service and other business subjects related to the tourism industry. This resource, however, is underutilized. The task now is to implement customer service as basic training for all employees in contact with the public, including those workers involved in government services and public agencies.

- **Expand cultural offerings**. Many overnight visitors to Page want to experience quality contacts with Native American culture and history. Their desire, however, can be difficult to fulfill. To improve opportunities in this area, consider developing a cultural center that features Navajo and Hopi life; encourage Native American exhibitions of art and culture; and work with the Salt River Project and the Navajo Nation to foster more Native American entrepreneurs in the tourism industry.

- **Upgrade internet presence and make it interactive for trip planners**. Every tourism-destination will need to keep up with advances in the use of technology to satisfy customers. Currently, many small countries and remote islands are far ahead of more established destinations in providing internet-based trip planning tools. Page can build a reputation as an internet-friendly destination by expanding its web site to feature interactive travel planning and reservation services. By partnering with Navajo and Hopi destinations, these services could also include attractive Native American links. Page should also consider developing a local business center or cybercafe providing internet access for travelers.

- **Upgrade worker skills.** Survey businesses to assess their employment needs. Then work with Coconino Community College, Northern Arizona University, and the Navajo Nation to provide courses of study that will improve skills in essential areas. Course work should be designed both for existing workers and for current students.

- **Cooperate on new business strategies.** Page benefits from relatively high demand for its visitor services during the high season, which eliminates the need for cutthroat competition. Take advantage of this friendly situation to work together on long term planning that features joint ventures, cross marketing, and positive public relations for the entire industry. An organization such as the Chamber of Commerce or an economic development group may be needed to foster and incubate these collaborations.

- **Collaborate with government and public land managers on creating new products and promoting markets.** By working with entities such as the National Park Service and the Navajo Nation, new tours and attractions could be made available and of interest to niche market travelers such as ecotourists or those pursuing history, archaeology, or even extreme sports. These new attractions would be Page-area products and face little outside competition. In some cases, grant money to develop markets is available through partnerships with federal agencies and Indian tribes.

- **Participate in the decision-making process.** Whenever policies are under discussion that may affect tourism (taxes, Lake Powell issues, transportation), an appointed industry leader or group should join in the planning process to research alternatives. By educating both policy-makers and industry participants on the issues involved, more points of view can be accommodated in the final decisions.

- **Agree on a long-term plan for growth and development, and stick to it.** Because the City of Page owns most of the available land base for future development, it has a unique opportunity to control its own destiny. City general plans, however, often don't stand up to public pressures. One strategy for maintaining a sensible course of development is to obtain community agreement for specific goals based on an understanding of the long-term effects of growth issues. First, solicit community opinions on the types of development that would best serve the interests of the community—and those that would not. Then arrange for community representatives to make fact-finding visits to other towns that have already faced strong development activity. These visits would examine the host towns' successes and mistakes, finding out what residents and decision-makers are most proud of and what they would like to change. By applying this information to Page's current plans and projections, consensus decisions can be reached—and sustained—regarding how the city should grow and look in coming decades.

### B—Marketing Strategies

The following strategies are based on existing research and current trends in the tourism industry. More primary research would help refine marketing strategies for the Page area. Visitor studies, in particular, could examine the demographics of visitors, their reasons for visiting Page, and their satisfaction with the experience. Among the suggestions to consider:

- **Position Page through its proximity to the southwest's most spectacular geologic wonders and its image as the area's "playground."** Marketing should illustrate Page's image and special features, but emphasize what makes Page stand out from the others. Places to start are Page's central location with respect to natural wonders, and its image and atmosphere as the "playground" of the Grand Circle. NAU hospitality professor Allen Reich has written a book on positioning which could be a resource for an effective positioning strategy.

- **Highlight Page's mild winter weather to combat seasonality**. Page enjoys milder temperatures and less snowfall than most surrounding areas. By making this fact better known, especially in Las Vegas, Page could help combat off-season doldrums.

- **Promote less-famous attractions and activities**. The Grand Canyon and Lake Powell draw millions of visitors to the region. Places such as Antelope Canyon, Horseshoe Bend, and a mix of other less-well-known attractions could help increase tourists' length of stay in Page. They should be promoted aggressively throughout the area.

- **Develop promotional and informational materials in German and French**. International visitors are strongly attracted to the region. It makes good sense to reach out to meet their language and information needs.

- **Collaborate on joint marketing ventures**. Continue working with the "Arizona Rocks" program, but also look for new joint ventures, such as partnerships with Navajo Nation, the National Park Service, and nearby communities. Also increase cooperative ventures among local-area businesses and organizations.

- **Develop and prioritize new target markets**. Additional research is needed to refine new target markets, but current information points to some opportunities:

  - ***Geographical markets***. Las Vegas may be a viable market given its population growth, proximity, warm-weather climate and strong tourist population. Partnerships with Las Vegas mega-hotels for regularly scheduled fly-van tours to Page might increase visitation, especially during shoulder season.

  - ***National Park visitor market***. The area's national parks are significant attractions, and tourists often visit several during a single vacation. Recent introduction of new National Parks Passes (for entrance into all federal parks) should further encourage multi-park visitation. This market segment holds significant potential for Page and could be more specifically targeted through well-placed advertising.

  - ***Cultural tourism market***. Native American culture is a primary draw to the area, but the Indian reservations lack sufficient infrastructure development to accommodate additional visitors. A marketing partnership between the Navajo Nation and Page could create mutual benefits and attract more cultural tourists.

- **Design marketing communications that match what we know about the consumer decision-making process**. Travelers usually move through four stages when making vacation plans:

  **Stage 1—*Awareness.*** Initial communications for new markets should introduce Page, describe what it has to offer, tell where it is located, and suggest how to get there. Consider a focus on Page as the "hub" of the Grand Circle and its accessible location along U.S. Highway 89.

  **Stage 2—*Interest.*** Marketing communication must stimulate interest in Page as a destination that offers a variety of high-interest features and activities. Travelers who have not yet visited Arizona say they are most interested in natural beauty, good weather, quality of lodging, variety of attractions, and outdoor recreation opportunities (Behavior Research Center, 1996), while those who have visited Arizona ranked their top activities as sightseeing, visiting national and state parks, visiting historic sites, hiking and biking, and camping (DK Shifflet & Associates, 1998). Page is in a superior position to benefit from these interests.

  **Stage 3—*Desire.*** Strong, clear messages should stimulate a desire to visit Page by illustrating the area's awesome scenery, abundance of outdoor recreation opportunities, proximity to National Park Service areas and Native American reservations, quality lodging facilities, and enjoyable year-round weather. Responses to inquiries by potential customers must be flexible and targeted to their expressed interests.

**Stage 4—*Action.*** The communication process must end by helping prospective visitors make plans, arrange reservations, and reach their destination. Technological innovations can help close the deal conveniently by phone, fax, internet, or other electronic means.

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# Appendix A

## METHODOLOGY OF ECONOMIC BASE STUDY FOR COCONINO COUNTY AND PAGE

## Methodology of Economic Base Study for Coconino County and Page

### A. County Data

The primary data source used in the economic base study is *County Business Patterns*, an annual product of the U.S. Bureau of the Census. Among annual reports, *County Business Patterns* provides the most sectorally detailed data at the county level. It contains one major drawback: while it covers most private-sector enterprises, it excludes the public sector.

Economic activity is reported by establishment in *County Business Patterns*. An establishment is defined as a single physical location at which business is conducted; in other words, one company may consist of multiple establishments. By sector, *County Business Patterns* provides the total number of establishments, the number of establishments by employment-size class, the number of employees, and payroll. A strict rule protecting the confidentiality of an individual establishment means that employment and payroll data may be withheld in sectors with few establishments or with one establishment that dominates. For those sectors affected by this disclosure rule, employment was estimated.

The economic base study makes it possible to determine a common indicator of industry concentration called the "location quotient." This is calculated by dividing the local sector's per capita employment by the national sector's per capita employment. A location quotient greater than 1.0 signifies a greater concentration of the sector at the local level. This may indicate export activity—that the product or service is disproportionately sold to companies or individuals residing outside the local area. By this definition of export activity, tourism is considered to be an exporting industry. Anomalies in local purchasing patterns, however, can also affect location quotients, particularly in relatively small sectors.

### B. Zip Code Data

The Census Bureau also produces a companion product, *Zip Code Business Patterns*. Broken down by individual Zip Code, it provides the same data as *County Business Patterns*, but only for all economic activity as a total—not by sector. Sectoral data is limited to the number of establishments per employment-size class. Based on this distribution, however, a rough estimate was calculated for sectoral employment in the Page area.

# Appendix B

## INTERVIEWS CONDUCTED

## Cluster Participant Interviews

A total of 14 members of the Page community were formally interviewed during March and April 2000 regarding their outlook on the Page-Area Tourism Cluster. Interviewees represented a cross-section of interests including business, government, education, and the Navajo Nation.

| Name | Representing |
|---|---|
| **Mike Anderson**, Owner | Anderson Feed & Fence |
| **Bob Bowling**, Mayor | City of Page |
| **Lloyd Hammonds**, Dean | Coconino Community College—Page Campus |
| **Rosie Hensley**, Chairperson | Tourism and Events Board, City of Page |
| **Nancy Holt**, Property Manager | Best Western at Lake Powell |
| **Roberta John**, Deputy Director | Navajo Nation Division of Economic Development |
| **Irit Langness**, Vice President Sales/Marketing | Sunrise Airlines |
| **Chris Korologos**, General Manager | Courtyard by Marriott |
| **Regina Lane**, Community Relations Representative | Navajo Generating Station, Salt River Project |
| **Terry Morgan**, Manager | Hollywood AZ Video Store |
| **Kathy Meunzen**, Director of Catering and Sales (interviewed with Chris Korologos) | Courtyard by Marriott |
| **Tom Schultes**, Editor | Lake Powell Chronicle |
| **Joan Nevilles Staveley**, Director | Page/Lake Powell Chamber of Commerce |
| **Steve Ward**, Director of Public Relations | Lake Powell Resorts and Marinas |