

Sedona 2018 Resident Survey Report

Report date: October 10, 2018

Overview

In an effort to develop a sustainable tourism plan for the community of Sedona including residents and businesses in partnership with the Chamber and Tourism Bureau, new insights from visitors, residents and businesses were needed to construct a plan for today's situation and a desired future state. This report provides primary data on Sedona's residents collected during June and July of 2018. An eight-page mail survey was sent to a sample of 1,000 residents by ASU researchers, one person was reported to be deceased, four reported to be unable or unwilling to complete the survey, 376 returned for a response rate of approximately 38%. Sixty-eight (68%) percent of address were in Sedona, 10 percent in other places in Arizona, and the remaining out-of-state or international.

Key Findings

The data results from the study are organized into the following themes – methods, demographics and residency of respondents, involvement in tourism, knowledge and opinions about tourism, residents' opinions about quality of life, and segmentation analyses.

Methods

- 1,000 questionnaires were sent by mail to a randomly selected sample of residents with two follow-ups sent to non-respondents. 376 surveys were completed for a 38% response rate.

Demographics

- Average age of the respondents was 67 years old. The largest age segment was the Baby-Boomers, 54-72 years old (65%). Women (52%) were slightly more common than men (48%) as respondents. Most respondents were highly educated (76% with a college degree) and financially well-off (41% with incomes of \$100,000 or more). *Figure 1; Tables 1-3.*

Residency

- Most respondents noted they were full-time residents of Sedona (74%) and had lived there for an average of 15 years. Very few current residents grew up in Sedona (2%). Most visited either as a tourist (85%) and/or for business (24%) before moving to the community. That experience as a visitor was highly influential on their decision to move to Sedona with 58% indicating that it influenced their decision either quite a bit or a lot. *Figure 2; Tables 4-6.*

- On open-ended questions respondents were able to indicate why they first moved to Sedona and why they continued to live there. For both, scenic beauty was the most common answer, followed by climate, outdoor activities and quietness. The answers then diverged somewhat in that the small-town nature of Sedona appealed to those moving to the community as did its cleanliness and family connections. Friends and the community, however, emerged as primary reasons to stay. *Figures 3 and 4.*

Involvement in Tourism

- Because involvement in tourism is often associated with the way people feel about tourism in their communities, residents were asked about their involvement in tourism in Sedona. Few residents indicated they give input on tourism decision making with 38% reporting very little involvement, 33% reporting no involvement, 25% reporting some involvement. Only 4% reported a lot of involvement. *Table 7.*
- Most residents have contact with tourists with only 12% noting they have no contact with tourists at all and 45% indicating they have a moderate to a lot of contact with tourists. A small number of respondents, however, reported that they are directly (9%) or indirectly (9%) employed in tourism. *Tables 8 and 9; Figure 5.*
- Many residents (61%) had out-of-town guests stay with them in 2017; over 60% with an average of 6.5 guests. As well, 8% indicated they had paying customers stay with an average of 4.8 guests. *Tables 10 and 11.*

Residents' Knowledge about Tourism

- Residents were asked several questions to gauge their knowledge about the role of tourism in Sedona. A fairly large percentage of respondents (43%) felt that tourism should have less of a role than it currently does, with another 50% expressing the opinion it should have the same role as now. Few were of the opinion that it should have either a greater role (6%) or no role (1%). *Figures 6 and 7.*
- Residents appeared to be fairly knowledgeable about the economic implications of tourism. When asked to estimate the percentage of jobs in Sedona attributed to tourism, 48% of respondents believed that 61-80% of Sedona's jobs are tourism related, while 26% believed 41-60% of jobs are tourism related. They also believed similarly about the percent of the city's operating budget funded by visitors with 42% of the opinion that 61-80% of the budget came from visitor spending, and 29% thinking that 41-60% came from visitors. *Tables 12 and 13.*
- Residents were also aware of the influence tourism can have on community amenities. They were asked to provide their opinion on the extent to which tourism impacts the mix of quality community amenities. A large percentage of residents indicated tourism had a great impact on five amenities: variety of restaurants (91%), variety of festivals and events (80%), variety of retail/shopping (71%), variety of nearby outdoor recreation opportunities (71%), and variety of museums/arts/cultural venues and activities (61%). *Table 14.*

Residents' Opinions about Tourism

- Residents were asked about the acceptability of further expansion of several types of tourism development. These items were asked on a five-point scale so the closer the average response is to five, the higher the acceptability of the kind of tourism experience or service. The most acceptable type of tourism products leaned toward outdoor experiences and included: state/national parks and heritage sites (4.3), non-motorized trails (4.2), archeological sites (4.0), outdoor recreation (4.0), and public transportation (4.0). The least acceptable types of tourism products leaned toward additional accommodations and included: motorized trails (2.2), Airbnb (2.4), hotels/motels (2.8) and resorts (2.9). *Table 15.*
- Residents were also asked about the acceptability of several kinds of overarching economic development options similarly measured on a five-point scale. The most acceptable options included: medical and health (4.4), higher education (4.2), craft beverages (4.0) and professional services (4.0). The least acceptable options included light manufacturing (2.6) and construction (2.9). Tourism and outdoor recreation was toward the high end of moderately acceptable (3.7). *Table 16.*
- To understand limits of acceptability of changes in tourism demand or behaviors, residents were asked a series of questions about the current situation in Sedona and desired future conditions. On average, all of the features of Sedona for a current assessment were in the range of 2.0 to 4.6 where “3” meant about right, “1” meant too little/few and “5” meant too much/many. The items that fell into the too much/many categories were amount of traffic and number of tourists and residents were fairly strong in wanting less in the future. They tended to feel the same about noise and lighting at night though less strongly. On the other hand, items residents pointed out as having too little and wanting more included public transportation and overall community walkability. Items that appeared to be about where residents think they should be include variety of attractions, restaurants, and directional signage. *Table 17.*
- To determine the tradeoffs residents may be willing to accept, they were asked about several simple scenarios relating to changing amounts of tourism activity. People tended to agree that they would support current levels of tourism if traffic flows were improved (60% agreed or strongly agreed). They leaned toward supporting the current levels of tourism if a sustainable approach to tourism management is taken (46% agreed or strongly agreed). Residents were not supportive of either less city services or assessment of a city property tax if it meant less tourism (25% and 21% agreed or strongly agreed, respectively), nor were they supportive of more tourism if it resulted in a broader range of community amenities (20% agreed or strongly agreed). *Table 18.*
- Residents were asked about the importance of various sustainability practices in Sedona (general context). The most important practices was “Leave No Trace principles in parks and on public lands” (4.6 mean on a 5 point scale where 5 is “very important.”). Locally owned and operated tours and attractions that are gentle to the environment was next in importance to Sedona residents (4.3 mean). One of the lesser in importance was sustainability certification by businesses (3.7 mean). *Table 19.*

- In order to gain insight into the kinds of visitors Sedona residents prefer, they were asked to rate a variety of tourist types according to the benefits and costs they think specific kinds of tourists have on the community and their preference for these types of tourists. Respondents had the most positive perceptions of travelers visiting friends and relatives (84% positive), cultural/heritage travelers (77% positive), leisure visitors during off-peak season (77% positive), arts aficionados (74% positive), and non-motorized outdoor recreationists (66% positive). They had the least favorable opinion about motorized recreationists (51% negative). *Tables 20 and 21.*

Importance and Satisfaction with Quality of Life

- Tourism has positive and negative impacts on quality of life. Residents were asked to rate the importance and their satisfaction with several quality of life indicators that are related to tourism. The largest gap between importance and satisfaction was with crowding of roads noted as very important (4.6 on a 5-pt scale where 5 is very important), with low satisfaction (1.7 on a 5-pt scale with 5 as very satisfied). Other kinds of crowding have the next largest difference between importance and satisfaction including crowding of other areas in Sedona (4.2 and 2.3, respectively), crowding in Uptown (3.8 and 2.1, respectively), and crowding on trails (4.3 and 2.5 respectively). *Table 22.*

Other Comments

- Residents were able to include additional comments on the survey form. Themes that were often mentioned included traffic and congestion, transportation, overtourism, short-term rentals, and public and green spaces. *Figure 8.*

Segmentation

- To gain additional insight into residents' opinions about tourism, some segmentation analysis was conducted. Part-time residents as well as those who have lived in Sedona for a shorter amount of time tended to be more positive about the role of tourism in the community's economy. A higher percentage of part-time residents (64%) indicated that the role of tourism in Sedona's economy should be the same as it is now with 22% indicating it should be less, while 45% of full-time residents were of the opinion tourism should have the same role as now and 51% indicated it should have less of a role. There is a negative relationship between opinions about tourism's role in the economy and length of residence with a higher percent of those who have lived in Sedona for less time feeling that the role of tourism should be the same as it is now and those with longer residency being more inclined to think it should have less of a role. *Tables 23 and 24.*
- To investigate resident characteristics that might also be related to opinions about tourism's role in the community some further analysis was done.
 - Respondents in households more dependent on tourism for income more often reported tourism should have the same role as now (direct employment=67%; indirect employment=50%; no employment=47%). Those indirectly employed in tourism were the most likely to feel tourism should have a greater role (16%). *Table 25.*

- Residents more involved in giving input about tourism decisions had an inverse relationship to opinions about tourism's role in the economy with the more involved the less likely to think tourism should have the same or a greater role (not at all involved=68%; very little involvement=56%; some involvement=45%; a lot of involvement=23%). *Table 25.*
- Residents who have either a little bit or a large amount of contact with tourists tended to be more positive than those with no contact or a moderate amount of contact. *Table 25.*

Submitted by ASU 10/10/18 by Dr. Kathleen Andereck and Kim Pham

Residents' profile

Demographics

Gender

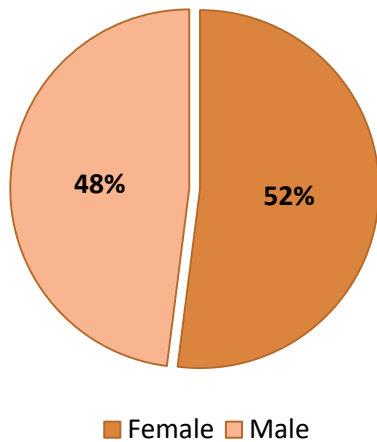


Figure 1. Gender

Age

Table 1. Residents' age based on generation

Generations	n	%
Baby-Boomers (54 – 72 years old)	238	65
The Silent Generation (73 years old or older)	96	26
Generation X (39 - 53 years old)	28	8
Millennial Generation (18 - 38 years old)	3	1
Total	365	100%

Mean: 67, mode: 24, range: 24 to 95

Household Income

Table 2. Annual household income

Annual household income	n	%
Less than \$25,000	9	2
\$25,000 - \$49,999	30	8
\$50,000 - \$99,999	102	28
\$100,000 - \$149,999	54	15
\$150,000 or more	98	26
Not willing to provide	77	21
Total	370	100%

Education

Table 3. Highest level of education

Highest education level	n	%
Less than high school	3	1
High school graduate	15	4
Some college	57	15
Technical school degree	12	3
College degree	117	31
Advanced degree	170	45
Less than high school	3	1
Total	376	100%

Residency

Residency status

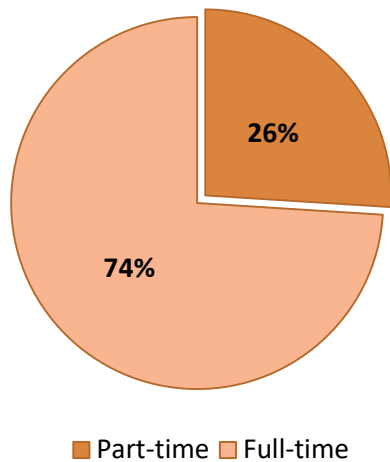


Figure 2. Full time, part time residency

Length of residency

Table 4. Length of residency in Sedona

No of years	n	%
0 year *	3	1
1 - 5 years	89	24
6 - 10 years	74	20
11 - 15 years	48	13
16 - 20 years	53	14
21 - 60 years	105	28
Total	372	100%

Mean: 15.4, mode: 8, range: 0 to 60

**: Those who filled in 0 years explained that they only purchase the property to rent out or use it as second home/vacation home*

Relation to Sedona

Table 5. Residents' historic relation to Sedona

Relation to Sedona	No	Yes
Did you live in Sedona as a child?	364 (98%)	6 (2%)
Before moving to Sedona, did you visit as a tourist?	50 (15%)	288 (85%)
Before moving to Sedona, did you visit as on business?	160 (76%)	51 (24%)

Table 6. Influence of tourist or business experience on decision to move to Sedona

Scale of influence	n	%
1 - Not at all	59	18
2 - Very little	23	7
3 - Some	57	17
4 - Quite a bit	82	24
5 - A lot	116	34
Total	337	100%

Scale of 5, Mean: 3.5

house-cost
quietness
business-work
outdoor-activities
friends
location
low-traffic
retirement
community
dark-sky-city
family
art-culture
climate
cleanliness
small-town

A word cloud visualization of the top 100 words from the survey. The words are arranged in a circular pattern, with the most frequent words being the largest. The words are: scenic-beauty, climate, outdoor-activities, friends, community, quietness, business-work, family, art-culture, quality-of-life, home-property-ownership, cleanliness, spiritual-wellness, small-town, and nature-in-landscape.

Involvement in tourism

Table 7. How often do you give input on tourism decisions in Sedona?

Mean: 2.0

Table 8. Level of contact with tourists

Mean: 2.5

Household income from tourism

Table 9. Family/household income from tourism

Extent of income	N	%
At least one person is directly employed in tourism	30	9
At least one person is indirectly employed in tourism	32	9
No one is employed in tourism	285	82
Total	347	100%

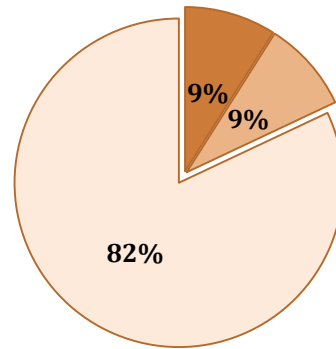


Figure 5.

Family/household income from tourism

Number of Guests in 2017

Table 10. Out of town personal guests stayed in residents' home in Sedona in 2017

Personal guests	0 group/guest	1 group/guest and over	Range	Sum	Mean
Number of groups	137 hh (39%)	219 hh (61%)	0 - 25	782	2.2
Number of guests	137 hh (39%)	219 hh (61%)	0 - 50	2320	6.5

hh: household

Table 11. Paying customers stayed in residents' home or a property in Sedona in 2017

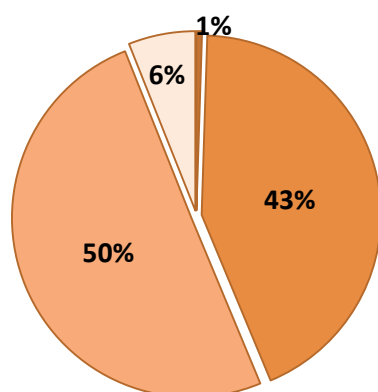
Paying customers	0 group/guest	1 group/guest and over	Range	Sum	Mean
Number of groups	327 hh (92%)	27 hh (8%)	0 - 100	642	1.8
Number of guests	327 hh (92%)	27 hh (8%)	0 - 300	1714	4.8

hh: household

Residents' knowledge and opinions about tourism

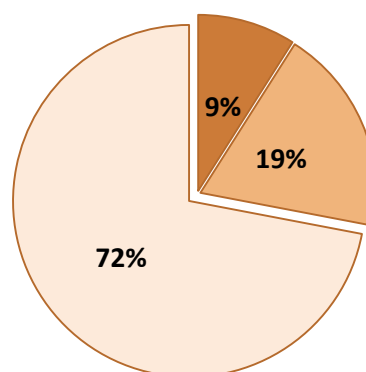
Residents' guessing the contribution or effect of tourism

Role of tourism



- No role
- Less of a role than now
- Same role as now
- Greater role than now

Figure 6. Role that tourism should have in the Sedona's economy



- No role
- A minor role
- A significant role

Figure 7. Tourism's role in having no city property tax

Job attribution

Table 12. Jobs attributed to tourism in the region

Percentage of jobs attributed to tourism	n	%
0-20%	5	2
21-40%	33	10
41-60%	90	26
61-80%	164	48
81-100%	48	14
Total	340	100%

City budget

Table 13. City's Annual Operating budget funded by visitors

Percentage of the City's Annual Operating budget	n	%
0-20%	13	4
21-40%	50	15
41-60%	99	29
61-80%	143	42
81-100%	34	10
Total	339	100%

Impacts of tourism on community amenities

Table 14. Impact of tourism on the mix of high quality community amenities

Communities amenities	n	1	2	3	Mean
		No impact	Little impact	Great impact	
Variety of restaurants and other food and beverage	342	2%	7%	91%	2.9
Variety of festivals and events	344	3%	17%	80%	2.8
Variety of retail/shopping	344	4%	25%	71%	2.7
Variety of nearby outdoor recreation opportunities	342	6%	23%	71%	2.7
Variety of museums/arts/cultural venues and activities	340	6%	33%	61%	2.6

Residents' opinions about tourism development

Acceptance of experiences or services expansion

Table 15. Acceptance of expanded interest and demand for tourism experiences or services

Expanded interest & demand for:	n	1	2 & 3	4 & 5	Mean
		Not Acceptable	Moderately Acceptable	Very Acceptable	
State/National Parks & Heritage Sites	345	3%	15%	82%	4.3
Trails-nonmotorized	346	5%	16%	79%	4.2
Archeological sites	344	7%	21%	72%	4.0
Outdoor recreation opportunities	346	6%	23%	71%	4.0
Public transportation	347	4%	28%	68%	4.0
Museums/Galleries	344	4%	27%	69%	3.9
Festivals/events	341	6%	31%	63%	3.8
Wineries/craft brewers	344	4%	38%	58%	3.7
Entertainment (theaters, music, etc.)	345	3%	36%	61%	3.7
Scenic drives	337	12%	28%	60%	3.6
Retail stores/Shopping	340	6%	45%	49%	3.5
Tour services	343	15%	40%	45%	3.2
Bed and Breakfasts/ Inns	344	17%	33%	40%	3.1
Spiritual/metaphysical activities	345	14%	42%	34%	3.1
Resorts	340	26%	40%	34%	2.9
Hotels/Motels	344	28%	42%	40%	2.8
Airbnb	334	39%	37%	24%	2.4
Trails-motorized	343	44%	36%	19%	2.2

Acceptance of economic development options

Table 16. Acceptance of economic development options

Economic activities	n	1	2 & 3	4 & 5	Mean
		Not Acceptable	Moderately Acceptable	Very Acceptable	
Medical and health	368	1%	16%	83%	4.4
Higher education	365	5%	20%	75%	4.2
Craft beverages (beer, wine, etc.)	366	2%	32%	66%	4.0
Professional services	369	1%	24%	75%	4.0
Retail and other services	365	2%	35%	63%	3.9
Technology	366	4%	34%	62%	3.8
Tourism/Outdoor recreation	371	5%	37%	58%	3.7
Agriculture	363	12%	42%	46%	3.4
Federal/State/Local government	368	10%	54%	36%	3.2
Construction	366	13%	62%	25%	2.9
Light manufacturing	368	22%	45%	23%	2.6

Impacts of tourism on community and desired change in the future

Table 17. Current situation of community characteristics and desired change in the future

How do you rate current situation		Community characteristics	How much would you like to see in the future?		Difference (Mean future - Mean current)
n	Mean		n	Mean	
365	4.6	Amount of traffic	363	1.4	- 3.2
367	4.1	Number of tourists	365	2.2	- 2.0
363	3.6	Noise	364	2.2	- 1.4
362	3.4	Lighting at night	364	2.6	- 0.8
359	3.0	Variety of attractions	360	3.1	0.1
361	3.0	Restaurants	361	3.2	0.2
361	2.9	Directional signs	358	3.2	0.2
361	3.0	Trails	360	3.3	0.3
341	2.8	Disabilities access	342	3.3	0.4
360	2.8	Built environments	359	3.4	0.7
358	2.5	Parking lots	357	3.5	1.1
356	2.5	Roads	358	3.6	1.1
348	2.4	Public restrooms	350	3.6	1.2
365	2.4	Overall community walkability	365	3.9	1.5
363	2.0	Public transportation	359	4.1	2.1

Current situation scale: (1) Too little – (3) About right – (5) Too much

Future change scale: (1) Prefer less – (3) Keep as is – (5) Prefer more

Support to destination marketing

Table 18. Support to destination marketing

I would support...	n	1 & 2 Strongly Disagree	3 Neither Agree or Disagree	4 & 5 Strongly Agree	Mean
Current levels of tourism if traffic flows in city are improved	368	30%	10%	60%	3.5
Current levels of tourism if the city takes a sustainable approach to tourism management	371	27%	17%	46%	3.4
Increased levels of tourism if a broader range of arts, restaurants, and retail options are available	370	59%	21%	20%	2.3
Less city services if it means lower levels of tourism	362	52%	23%	25%	2.5
The assessment of a city property tax if it means lower levels of tourism	370	62%	17%	21%	2.3

Sustainable tourism initiatives

Table 19. Preference of sustainable tourism initiatives

I prefer to see the Chamber of Commerce & Tourism Bureau encourage...	n	1 Not important	2 & 3 Moderately important	4 & 5 Very important	Mean
Parks that promote the "Leave No Trace" principles	369	1%	8%	91%	4.6
Locally owned and operated tours or attractions that do not put stress on the surrounding environment	371	4%	13%	83%	4.3
Recognitions such as that by the International Dark Sky Association	371	4%	18%	80%	4.3
Businesses that implement environmental practices	372	2%	22%	76%	4.2
Low impact transportation options such as public transportation, bike share or pedestrian walkways	372	3%	22%	65%	4.1
Businesses where spending is retained locally	367	3%	24%	73%	4.1
Businesses that have a sustainability certification	365	7%	32%	62%	3.7

Visitor group preferences

Table 20. Rating of visitor groups according to the overall benefits or costs they have on Sedona (economic and quality of life)

Visitor groups	n	1 & 2 Very Negative	3 Both negative and positive	4 & 5 Very Positive	Mean
Travelers visiting friends & relatives	348	16%	30%	84%	4.4
Cultural/heritage travelers	346	2%	21%	77%	4.2
Leisure visitors coming in periods of low demand	345	4%	19%	77%	4.1
Arts aficionados	345	3%	23%	74%	4.1
Non-motorized outdoor recreationists (ex: hike, bike)	347	6%	27%	67%	4.0
Business travelers	341	7%	31%	62%	3.8
Meeting attendees	339	6%	33%	61%	3.8
Resort visitors	342	8%	34%	58%	3.7
Day visitor shoppers	348	25%	38%	37%	3.2
Day visitor sightseers	348	28%	38%	34%	3.0
Group tours	344	37%	41%	22%	2.8
Leisure visitors coming in periods of high demand	344	37%	46%	17%	2.7
Motorized recreationists (OHV)	347	73%	20%	7%	1.9

Table 21. Residents' preference of top four types of visitor groups

Visitors groups	n	%
Travelers visiting friends & relatives	224	62
Leisure visitors coming in periods of low demand	218	61
Non-motorized outdoor recreationists (ex: hike, bike)	162	45
Cultural/heritage travelers	152	42

Residents' Opinions about Quality of Life

Importance and satisfaction about Quality of life

Table 22. Importance and satisfaction about Quality of life

Importance to you		Quality of Life Factors in your Community	Your satisfaction level		Difference (Mean satisfaction – Mean Importance)
n	Mean		Mean	n	
354	4.6	Crowding of roads	1.7	352	-2.9
351	4.2	Crowding in other areas of Sedona	2.3	345	-1.9
351	3.8	Crowding in Uptown	2.1	346	-1.7
349	4.2	Crowding of trails	2.5	348	-1.7
355	4.7	Peace and quiet	3.2	353	-1.5
355	4.8	Conservation of natural areas	3.4	348	-1.4
356	4.8	Clean air and water	3.5	350	-1.3
352	4.2	Fair prices of goods & services	3.0	347	-1.2
352	4.8	Limited litter & vandalism	3.7	344	-1.1
354	4.8	Attractiveness/cleanliness	3.7	348	-1.1
357	4.6	Preservation of cultural/historic sites	3.6	348	-1.0
352	3.7	Diversity and quality of employment	2.8	340	-0.9
355	4.8	Safety/lack of crime	4.0	349	-0.8
349	3.6	Diverse economy	2.8	343	-0.8
350	3.9	Cultural activities for residents	3.2	346	-0.7
354	4.7	Public safety (police, fire, etc.)	4.1	349	-0.6
354	4.2	Quality recreation opportunities	3.6	348	-0.6
348	4.2	High standard of living	3.5	342	-0.7
348	3.9	Adequate tax revenues to support City services	3.3	341	-0.6
351	3.5	Reasonable real estate costs	3.1	348	-0.4
339	3.6	Authentic culture	3.3	335	-0.3
344	3.7	Community identity	3.4	336	-0.3
351	3.1	Tourist spending	3.2	347	0.1

Importance scale: (1) Not at all important - - - (5) Extremely important

Satisfaction scale: (1) Not at all satisfied - - - (5) Extremely satisfied

Residents' additional comments



Figure 8. Residents' additional comments

Segmentation analysis

Role of tourism in Sedona's economy

Table 23. Residents' perceptions of the role of tourism based on residency status

Role that tourism should have in Sedona's economy	Residency status		n
	Part-time	Full-time	
No role at all	0%	1%	2
Less of a role than now	22%	51%	159
Same role as now	64%	45%	182
A greater role than now	14%	3%	22
Total	100%	100%	365

Table 24. Residents' perceptions of the role of tourism based on length of their residency

Role that tourism should have in Sedona's economy	Length of Residency				n
	0 year *	1 - 10 years	11 - 20 years	> 20 years	
No role at all	0%	1%	0%	1%	2
Less of a role than now	0%	35%	50%	53%	160
Same role as now	50%	58%	47%	39%	180
A greater role than now	50%	7%	4%	7%	23
Total	100%	100%	100%	100%	365

* 0 year: residents who explained they have vacation home or property for rent

Table 25. Residents' perceptions of the role of tourism based on level of involvement in tourism

Types of involvement in tourism	Role that tourism should have in Sedona's economy				Total
	No role at all	Less of a role than now	Same role as now	A greater role than now	
Extent of family or household income from tourism in Sedona					
At least one person is directly employed in tourism	0%	27%	67%	7%	100%
At least one person is indirectly employed in tourism	0%	34%	50%	16%	100%
No one is employed in tourism	1%	47%	47%	5%	100%
Level of giving input on tourism decision in Sedona					
Not at all	1%	31%	59%	9%	100%
Very little	0%	44%	50%	6%	100%
Some	1%	55%	40%	5%	100%
A lot	0%	77%	23%	0%	100%
Level of contact with tourists visiting Sedona					
No contact at all	3%	48%	40%	10%	100%
A little bit of contact	0%	40%	51%	9%	100%
A moderate amount of contact	1%	48%	49%	3%	100%
A large amount of contact	0%	43%	51%	6%	100%

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Survey

Resident Opinions About Tourism

Thank you very much for participating in this survey! Your answers will help us understand the needs and concerns of Sedona residents as we develop a Sustainable Tourism Plan. Please read each question carefully before responding and provide responses that consider averages over the course of a full year, rather than conditions that may occur during just peak or slow periods. Answer to the best of your ability and save any additional comments for the last page.



We would like to begin by asking you about the role of tourism and other industries in and near Sedona.

1. Compared to other industries, how important a role do you think tourism should have in Sedona's economy? *(Please check one)*
☐ No role at all ☐ Same role as now
☐ Less of a role than now ☐ A greater role than now
2. The following are types of economic development options. Please indicate how acceptable to you each of the following types of economic activities is for the Sedona area. *(Circle one response for each type of development)*

Economic activities:	Not Acceptable		Moderately Acceptable		Very Acceptable
Agriculture	1	2	3	4	5
Craft beverages (beer, wine, etc.)	1	2	3	4	5
Technology	1	2	3	4	5
Higher education	1	2	3	4	5
Light manufacturing	1	2	3	4	5
Medical and health	1	2	3	4	5
Retail and other services	1	2	3	4	5
Tourism/Outdoor recreation	1	2	3	4	5
Construction	1	2	3	4	5
Professional services	1	2	3	4	5
Federal/State/Local government	1	2	3	4	5

3. We would like to know more about your perceptions of tourism's contribution to the economy and quality of life in Sedona. If you had to guess the contribution or effect of tourism on Sedona's public finances or community offerings, what option for the following items would you select? *(Please check one answer for each question)*
- a. What percentage of the City's Annual Operating budget is funded by visitors?
☐ 0-20% ☐ 21-40% ☐ 41-60% ☐ 61-80% ☐ 81-100%
 - b. What percentage of jobs is attributed to tourism in the region?
☐ 0-20% ☐ 21-40% ☐ 41-60% ☐ 61-80% ☐ 81-100%
 - c. The City of Sedona currently levies no property tax on residents' homes. What is tourism's role in having no city property tax?
☐ No role ☐ A minor role ☐ A significant role
 - d. What impact does tourism have on the mix of high quality community amenities?
 Variety of restaurants and other food and beverage
☐ No impact ☐ Little impact ☐ Great impact
 Variety of retail/shopping
☐ No impact ☐ Little impact ☐ Great impact
 Variety of festivals and events
☐ No impact ☐ Little impact ☐ Great impact
 Variety of museums/arts/cultural venues and activities
☐ No impact ☐ Little impact ☐ Great impact
 Variety of nearby outdoor recreation opportunities
☐ No impact ☐ Little impact ☐ Great impact

The next section asks you some general questions about your involvement in and knowledge about tourism in Sedona.

- 4. How often do you give input on tourism decisions in Sedona, such as attending public meetings or writing letters to city or tourism leaders? *(Please check one)*
☐ Not at all ☐ Very little ☐ Some ☐ A lot
- 5. To what extent do you or others in your family or household receive your income from tourism in Sedona? *(Please check one)*
☐ At least one person is directly employed in tourism
☐ At least one person is indirectly employed in tourism (work organization provides at least part of its products/services to tourism businesses)
☐ No one is employed in tourism at all
- 6. How much contact do you have with tourists visiting Sedona? *(Please check one)*
☐ No contact at all ☐ A moderate amount of contact
☐ A little bit of contact ☐ A large amount of contact

Next are questions regarding your opinions about expanded interest and demand for specific types of tourism experiences and services.

7. The following are types of experiences or services in or near Sedona. To what extent do you feel these tourism experiences or services are not acceptable or acceptable for expanded interest and demand? (*Circle one response for each item*)

Expanded interest & demand for:	Not acceptable		Moderately acceptable		Very acceptable
Hotels/Motels	1	2	3	4	5
Bed and Breakfasts/ Inns	1	2	3	4	5
Resorts	1	2	3	4	5
Airbnb	1	2	3	4	5
Spiritual/metaphysical activities and facilities	1	2	3	4	5
Public transportation	1	2	3	4	5
Retail stores/Shopping	1	2	3	4	5
Festivals/Events	1	2	3	4	5
Wineries/Craft brewers	1	2	3	4	5
State/National Parks & Heritage Sites	1	2	3	4	5
Outdoor recreation opportunities	1	2	3	4	5
Museums/Galleries	1	2	3	4	5
Tour services	1	2	3	4	5
Entertainment (movie theaters, music, etc.)	1	2	3	4	5
Trails-nonmotorized	1	2	3	4	5
Trails-motorized	1	2	3	4	5
Scenic drives	1	2	3	4	5
Archeological sites (such as Native American ruins)	1	2	3	4	5

This next section focuses on tourism, quality of life, and sustainability in Sedona.

8. Tourism can have impacts that influence a community in a variety of ways. Below, you'll see a listing of community characteristics that can be influenced by tourism. In the left column, indicate your opinion about the current situation regarding that specific community characteristic in Sedona. In the right column indicate how, *if at all*, you would like each situation to change in the future. (*Circle one number in each column*)

How do you rate the current situation?					Community Characteristics	How much would you like to see in the future?				
<i>Too little</i>		<i>About right</i>		<i>Too much</i>		<i>Prefer less</i>		<i>Keep as is</i>		<i>Prefer more</i>
1	2	3	4	5	Number of tourists	1	2	3	4	5
1	2	3	4	5	Amount of traffic	1	2	3	4	5
1	2	3	4	5	Public transportation	1	2	3	4	5
1	2	3	4	5	Parking lots	1	2	3	4	5
1	2	3	4	5	Overall community walkability	1	2	3	4	5
1	2	3	4	5	Roads	1	2	3	4	5
1	2	3	4	5	Built environments (buildings, parks, transportation systems)	1	2	3	4	5
1	2	3	4	5	Directional signs	1	2	3	4	5
1	2	3	4	5	Disabilities access	1	2	3	4	5
1	2	3	4	5	Variety of attractions	1	2	3	4	5
1	2	3	4	5	Trails	1	2	3	4	5
1	2	3	4	5	Restaurants	1	2	3	4	5
1	2	3	4	5	Public restrooms	1	2	3	4	5
1	2	3	4	5	Lighting at night	1	2	3	4	5
1	2	3	4	5	Noise	1	2	3	4	5

9. Please indicate your level of agreement with each of the following statements about Sedona's visitor industry. (*Circle one response for each statement*)

I would support...	Strongly disagree		Neither agree or disagree		Strongly agree
current levels of tourism if traffic flows in town are improved	1	2	3	4	5
the assessment of a city property tax if it means lower levels of tourism	1	2	3	4	5
less city services if it means lower levels of tourism	1	2	3	4	5
increased levels of tourism if a broader range of arts, restaurants, and retail options are available	1	2	3	4	5
current levels of tourism if the city takes a sustainable approach to tourism management	1	2	3	4	5

10. Please indicate how important each of the following is to you. (*Circle one response for each statement*)

I prefer to see the Chamber of Commerce and Tourism Bureau encourage...	Not important		Moderately important		Very important
businesses where spending is retained locally	1	2	3	4	5
businesses that implement environmental practices	1	2	3	4	5
businesses that have a sustainability certification	1	2	3	4	5
low impact transportation options such as public transportation, bike share or pedestrian walkways	1	2	3	4	5
locally owned and operated tours or attractions that do not put stress on the surrounding environment	1	2	3	4	5
parks that promote the "Leave no Trace" principles	1	2	3	4	5
recognitions such as that by the International Dark Sky Association	1	2	3	4	5

11. Below is a list of factors that may contribute to the quality of life in your community. First, in the left column, rate how important each factor is to you personally, then rate how satisfied you are with each factor in the right column. (*Circle one number in each column*)

Importance to you					Quality of Life Factors in your Community	Your satisfaction level				
<i>Not at all important</i>				<i>Extremely important</i>		<i>Not at all satisfied</i>				<i>Extremely satisfied</i>
1	2	3	4	5	Tourist spending	1	2	3	4	5
1	2	3	4	5	High standard of living	1	2	3	4	5
1	2	3	4	5	Fair prices of goods & services	1	2	3	4	5
1	2	3	4	5	Adequate tax revenues to support City services	1	2	3	4	5
1	2	3	4	5	Reasonable real estate costs	1	2	3	4	5
1	2	3	4	5	Diverse economy	1	2	3	4	5
1	2	3	4	5	Cultural activities for residents	1	2	3	4	5
1	2	3	4	5	Crowding of trails	1	2	3	4	5
1	2	3	4	5	Crowding of roads	1	2	3	4	5
1	2	3	4	5	Crowding in Uptown	1	2	3	4	5
1	2	3	4	5	Crowding in other areas of Sedona	1	2	3	4	5
1	2	3	4	5	Clean air and water	1	2	3	4	5
1	2	3	4	5	Conservation of natural areas	1	2	3	4	5
1	2	3	4	5	Attractiveness/cleanliness	1	2	3	4	5
1	2	3	4	5	Safety/lack of crime	1	2	3	4	5
1	2	3	4	5	Limited litter & vandalism	1	2	3	4	5
1	2	3	4	5	Public safety (police, fire, etc.)	1	2	3	4	5
1	2	3	4	5	Community identity	1	2	3	4	5
1	2	3	4	5	Authentic culture	1	2	3	4	5
1	2	3	4	5	Diversity and quality of employment	1	2	3	4	5
1	2	3	4	5	Quality recreation opportunities	1	2	3	4	5
1	2	3	4	5	Preservation of cultural/historic sites	1	2	3	4	5
1	2	3	4	5	Peace and quiet	1	2	3	4	5

12. How would you rate the following visitor groups according to the overall benefits or costs they have on Sedona (economic and quality of life). Also, check the box of the top four types of visitors you prefer as visitors to Sedona (*Circle one response for each statement and check the box of your four preferred types of visitors*)

Visitor groups	Very negative		Both negative and positive		Very positive	Four preferred visitor types
Leisure visitors coming in periods of high demand	1	2	3	4	5	<input type="checkbox"/>
Leisure visitors coming in periods of low demand	1	2	3	4	5	<input type="checkbox"/>
Group tours	1	2	3	4	5	<input type="checkbox"/>
Business travelers	1	2	3	4	5	<input type="checkbox"/>
Meeting attendees	1	2	3	4	5	<input type="checkbox"/>
Travelers visiting friends & relatives	1	2	3	4	5	<input type="checkbox"/>
Resort visitors	1	2	3	4	5	<input type="checkbox"/>
Non-motorized outdoor recreationists (ex: hike, bike)	1	2	3	4	5	<input type="checkbox"/>
Motorized recreationists (OHV)	1	2	3	4	5	<input type="checkbox"/>
Cultural/heritage travelers	1	2	3	4	5	<input type="checkbox"/>
Arts aficionados	1	2	3	4	5	<input type="checkbox"/>
Day visitor shoppers	1	2	3	4	5	<input type="checkbox"/>
Day visitor sightseers	1	2	3	4	5	<input type="checkbox"/>

Finally, we would like to know a little bit about you. This information will help us ensure that we have a representative sample of Sedona residents. This information will be kept in the strictest confidence and will be used for statistical purposes only.

13. How many out of town personal guests stayed in your home in Sedona in 2017? (*Please fill in a number for each*)

Number of personal guest groups: _____ Number of personal guests in total: _____

14. If any paying customers (such as Airbnb) stayed in your home or a property you own in Sedona in 2017, how many? (*Please fill in a number for each*)

Number of paying guest groups: _____ Number of paying guests in total: _____

15. How many years have you lived in Sedona? _____ years

16. Are you a part-time or full-time resident? ☐ Part-time ☐ Full-time

17. Did you live in Sedona as a child?

<input type="checkbox"/> No-please continue with questions 17a-c	<input type="checkbox"/> Yes-please skip to question 18
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17a. Before moving to Sedona, did you visit as . . .

A tourist? ☐ Yes ☐ No

On business? ☐ Yes ☐ No

17b. How much did your tourist or business experience in Sedona influence your decision to move to Sedona? *(Please check one)*

☐ Not at all ☐ Very little ☐ Some ☐ Quite a bit ☐ A lot

17c. What was your main reason for MOVING to Sedona? *(Describe in your own words)* _____

18. What is your main reason for CONTINUING TO LIVE in Sedona? *(Describe in your own words)* _____

19. What is your age? _____ years old 20. Are you?: ☐ Female ☐ Male

21. Please indicate the highest level of education you have obtained. *(Please check one)*

<input type="checkbox"/> Less than high school	<input type="checkbox"/> Some college	<input type="checkbox"/> College degree
<input type="checkbox"/> High school graduate	<input type="checkbox"/> Technical school degree	<input type="checkbox"/> Advanced degree

22. Which statement best describes your total 2017 annual household income from all sources and before taxes? *(Please check one)*

<input type="checkbox"/> Less than \$25,000	<input type="checkbox"/> \$50,000 - \$99,999	<input type="checkbox"/> \$150,000 or more
<input type="checkbox"/> \$25,000 - \$49,999	<input type="checkbox"/> \$100,000 - \$149,999	<input type="checkbox"/> Not willing to provide

Thanks for completing this questionnaire. Please return this questionnaire to us in the pre-paid addressed envelope provided in your survey packet. If you have misplaced the envelope, please mail this to: School of Community Resources and Development, Arizona State University, 411 N. Central Avenue Ste. 550, Phoenix AZ 85004. **If you have any comments, please share them here or include a separate sheet of paper.**