

## Sedona 2018 Visitor Survey Report

Report date: October 9, 2018

### Overview

In an effort to develop a sustainable tourism plan for the community of Sedona including residents and businesses in partnership with the Sedona Chamber of Commerce & 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 visitors for the time period January 2018 to July 2018. A two-page on-site survey (included at the end of this report) was conducted by ASU researchers at six locations that represent a range of visitor types in town and at popular attractions and trailheads. One thousand and one completed surveys were achieved over 14 randomly selected weekdays and weekends in 215 hours of field surveying during the seven-month period.

### Key Findings

The data results from the study are organized into the following themes – methods, demographics of respondents, travel party description and trip characteristics, sustainability, and segmentation of select variables.

#### *Methods*

- 1,001 surveys were completed with 1,657 attempts for a 60% response rate (40% refusal rate). A similar quota per hour was established at each survey location. Chapel of Holy Cross produced the most completed surveys (n=214) and West Fork Trail (n=122) the lowest based on visitor levels. *Tables 1 and 2.*

#### *Demographics*

- Average age of the respondent was 47 years old. The largest age segments were 50-64 years old (30%) and 18-34 years old (28%). Women (53%) were slightly more common than men (47%) as respondents. *Figures 1 and 2.*
- Nine out of ten visitors (91%) were from the U.S. and 9% were international with Canada comprising 69% of the international visitor segment. Arizona residents (35%) comprise one-third of the U.S. market. California residents (14%) were the second largest U.S. segment. *Figures 3 and 4; Tables 3 and 4.*

#### *Travel Party Description and Trip Characteristics*

- Average travel party size is 3.6 persons from groups that were one person to as large as 50 people. The most common party group size is two persons. Groups were more likely

to include women (50%), then men (38%) and children (12%). Groups were comprised mostly of family members only (57%), friends only (22%), a mix of family and friends (14%). Organized group tours (1%) were less common in our sample even though they were approached for participation. *Tables 5-7.*

- Average number of past trips was four trips from a range of one to 104 visits over a lifetime. Over half (55%) were visiting the Sedona area for the first time. *Figure 5.*
- Most visitors (63%) in this study stayed overnight in the Sedona area with the remaining as day visitors (37%). For those who stayed overnight, the average length was 3.5 nights though the most common length was two nights. Arizona residents were more likely to be on a day trip (58%) in comparison to an out-of-state travel party (27% day trip). Accommodation choices were most likely to be a full-service hotel (22%), followed by a resort (20%), rented vacation home -Airbnb, HomeAway, VRBO (15%), limited service hotel (11%), timeshare (10%), campground (9%), B and B (8%) and staying with friends or relatives (7%). *Figure 6 and Table 8.*
- The primary purpose of the visit in Sedona was for pleasure or a vacation (87%). Visiting friends and relatives (9%), business (2%) and a variety of specific activities (2%) describe the remaining trip types. *Table 9.*
- Hiking (72%) was the most popular activity with this sample (which included three outdoor recreation sampling sites). Shopping (68%), sightseeing (68%), and dining (66%) comprised the remaining activities where over 50% of the respondents participated in the activity. *Table 10.*
- Over half (55%) of the visitor respondents rated Sedona as “excellent.” Forty-two percent rated the destination as “above average.” Very few (3%) rated as average and no one gave the destination a below average rating. *Figure 7.*

### *Sustainability*

- Visitors were asked about the importance of various sustainability practices in destinations they vacation in (general context). The most important practice is “leave no trace principles in parks and on public lands” (4.3 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 visitors (4.0 mean). Two of the lesser in importance practices are sustainability certification by businesses (3.5 mean) and communities recognized by the International Dark Sky Association (with which Sedona is recognized) (3.4 mean). *Table 11.*
- To understand limits of acceptability of changes in tourism demand or behaviors, visitors 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 range of 2.6 to 3.5 where “3” meant about right. On average, some of the features for future conditions (suggesting areas to change/improve), several items were skewed toward “want less” including amount of traffic and number of tourists. Several items were skewed toward “want more” including parking lots, public transportation and restrooms. *Table 12.*

- Sustainability is closely tied to visitor behavior. In the survey, visitors were asked what places they were aware of, where they visited, and if they visited a place at a less crowded time. The most visited place was Uptown (79% visited) (a place we surveyed) and Oak Creek Canyon (74%). Visitors were least aware of the visitor information center operated by SCC&TB (73% unaware or not interested to visit), Palatki and Hononki sites (80%), and a few trails (Soldier Pass and Devil's Bridge trails). From one to three percent of visitors attempted to visit a place in Sedona and couldn't find parking including developed areas like Uptown or Tlaquepaque. A few more (2%-6%) visitors avoided a place because of crowds. And a 3% to 6% of visitors indicated intentionally visiting a place during a slow time period. *Tables 13a and 13b.*

### *Segmentation*

- Where visitors came from (in-state, out-of-state or foreign) did not influence satisfaction ratings, nor did age categories. Instead, overnight visitors gave significantly higher satisfaction scores with 59% of overnight visitors selecting "excellent" in comparison to 48% of day trip visitors. *Tables 14 to 16.*
- In-state visitors were twice as likely to be visiting Sedona as a repeat visitor compared to out-of-state or foreign visitors. Out-of-state and foreign visitors were equally likely to be a first-time visitor with six of ten visitors indicating a first trip to Sedona. *Table 17.*
- Out-of-state (73%) and foreign (70%) visitors were almost twice as likely than in-state residents (42%), to stay overnight in Sedona. *Table 18.*
- Activities in Sedona did not vary widely between in-state, out-of-state or foreign visitors. In-state residents were slightly more likely to hike than the other groups. *Table 19*
- Group size for a single traveler or a two-person party were similar across in-state, out-of-state or foreign visitors. In-state groups were more likely to be three-person groups. Foreign visitors were more likely to be four-person groups. *Table 20.*
- A final segmentation analyzed key crowding measures over the seven-month period. The sampling locations were the same over this time, but the visitors were not. A rise in perceptions of the number of tourists and traffic occurs in April and visitors express desiring fewer tourists and less traffic, however, satisfaction is not impacted. *Table 21.*

*Submitted by ASU. Dr. Christine Vogt and Kim Pham*

## Visitor Survey Methods Summary

Total completed surveys: 1,001

Number of refusals: 656, Total attempts: 1,657, Refusal rate: 40%

### Survey location

Table 1. No of hours and completed survey per location

| Location                          | Hours of survey  | Number of surveys | %           |
|-----------------------------------|------------------|-------------------|-------------|
| Chapel of Holy Cross              | 36               | 214               | 21          |
| Tlaquepaque Arts & Crafts Village | 35.5             | 195               | 19          |
| Uptown                            | 36.5             | 174               | 17          |
| Slide Rock State Park             | 36               | 163               | 16          |
| Crescent Moon Picnic Site         | 36               | 133               | 13          |
| West Fork Trail                   | 35               | 122               | 12          |
| <b>Total</b>                      | <b>215 hours</b> | <b>1,001</b>      | <b>100%</b> |

### Survey period

Table 2. Number of days and completed surveys per month

| Month        | Days surveyed  | Number of surveys | %           |
|--------------|----------------|-------------------|-------------|
| January      | 1              | 64                | 6           |
| February     | 3              | 235               | 23          |
| March        | 2              | 149               | 15          |
| April        | 2              | 160               | 16          |
| May          | 2              | 107               | 11          |
| June         | 2              | 133               | 13          |
| July         | 2              | 159               | 16          |
| <b>Total</b> | <b>14 days</b> | <b>1,001</b>      | <b>100%</b> |

## Demographics of Respondents

Unit of analysis: One tourist in each group who completed the survey

### Age group

Range: 18 to 86      Mean: 47.2

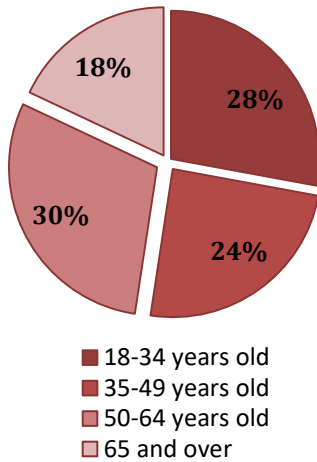


Figure 1. Age group

### Gender

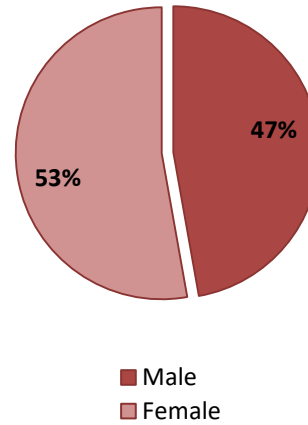


Figure 2. Gender

### Countries of origin

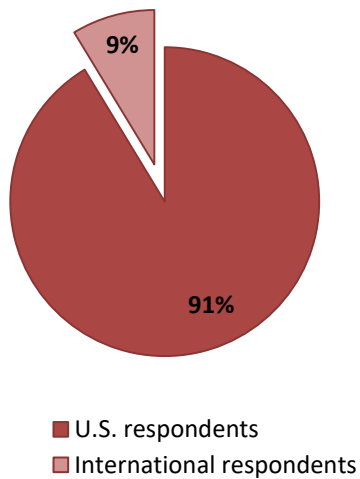


Figure 3.  
U.S. vs. International respondents

Table 3. Number of respondents per country

| Rank         | Country     | Number of respondents | %           |
|--------------|-------------|-----------------------|-------------|
| 1            | Canada      | 56                    | 69          |
| 2            | UK          | 5                     | 6           |
| 3            | Australia   | 3                     | 4           |
| 4            | Italy       | 3                     | 4           |
| 5            | Mexico      | 2                     | 2           |
| 6            | Netherlands | 2                     | 2           |
| 7            | Brazil      | 1                     | 1           |
| 8            | England     | 1                     | 1           |
| 9            | France      | 1                     | 1           |
| 10           | Germany     | 1                     | 1           |
| 11           | India       | 1                     | 1           |
| 12           | Israel      | 1                     | 1           |
| 13           | Japan       | 1                     | 1           |
| 14           | Philippines | 1                     | 1           |
| 15           | Russia      | 1                     | 1           |
| 16           | Switzerland | 1                     | 1           |
| <b>Total</b> |             | <b>81</b>             | <b>100%</b> |

## U.S. respondents

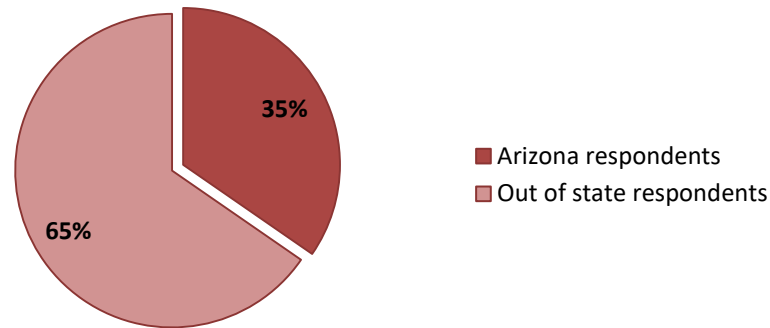


Figure 4. U.S. respondents

Table 4. Number of respondents per state/territory

| Rank         | State         | Number of respondents | %             | Rank | State          | Number of respondents | %   |
|--------------|---------------|-----------------------|---------------|------|----------------|-----------------------|-----|
| 1            | Arizona       | 295                   | 34.6          | 27   | Virginia       | 7                     | 0.8 |
| 2            | California    | 115                   | 13.5          | 28   | South Carolina | 6                     | 0.7 |
| 3            | Texas         | 32                    | 3.8           | 29   | Kansas         | 5                     | 0.6 |
| 4            | Michigan      | 25                    | 2.9           | 30   | Kentucky       | 5                     | 0.6 |
| 5            | Illinois      | 23                    | 2.7           | 31   | Louisiana      | 5                     | 0.6 |
| 6            | Ohio          | 22                    | 2.6           | 32   | North Carolina | 5                     | 0.6 |
| 7            | Washington    | 22                    | 2.6           | 33   | Alaska         | 4                     | 0.5 |
| 8            | Oregon        | 21                    | 2.5           | 34   | Nebraska       | 4                     | 0.5 |
| 9            | Wisconsin     | 20                    | 2.3           | 35   | New Hampshire  | 4                     | 0.5 |
| 10           | Florida       | 19                    | 2.2           | 36   | Rhode Island   | 4                     | 0.5 |
| 11           | New York      | 19                    | 2.2           | 37   | Alabama        | 3                     | 0.4 |
| 12           | New Jersey    | 15                    | 1.8           | 38   | Georgia        | 3                     | 0.4 |
| 13           | Colorado      | 14                    | 1.6           | 39   | Idaho          | 3                     | 0.4 |
| 14           | Minnesota     | 14                    | 1.6           | 40   | Iowa           | 3                     | 0.4 |
| 15           | Pennsylvania  | 14                    | 1.6           | 41   | North Dakota   | 3                     | 0.4 |
| 16           | Missouri      | 13                    | 1.5           | 42   | Wyoming        | 3                     | 0.4 |
| 17           | Nevada        | 11                    | 1.3           | 43   | Montana        | 2                     | 0.2 |
| 18           | Utah          | 11                    | 1.3           | 44   | Vermont        | 2                     | 0.2 |
| 19           | Massachusetts | 10                    | 1.2           | 45   | West Virginia  | 2                     | 0.2 |
| 20           | New Mexico    | 10                    | 1.2           | 46   | Hawaii         | 1                     | 0.1 |
| 21           | Connecticut   | 9                     | 1.1           | 47   | Maine          | 1                     | 0.1 |
| 22           | Indiana       | 9                     | 1.1           | 48   | Delaware       | 0                     | 0.0 |
| 23           | Maryland      | 9                     | 1.1           | 49   | Mississippi    | 0                     | 0.0 |
| 24           | Oklahoma      | 8                     | 0.9           | 50   | South Dakota   | 0                     | 0.0 |
| 25           | Arkansas      | 7                     | 0.8           | 51   | DC             | 1                     | 0.1 |
| 26           | Tennessee     | 7                     | 0.8           | 52   | Puerto Rico    | 1                     | 0.1 |
| <b>Total</b> |               | <b>851</b>            | <b>100.0%</b> |      |                |                       |     |

## Travel Party Description & Trip Characteristics

### Group size

Average: 3.57 persons per group Range: 1 to 50 persons

Table 5. Group size

| Group size      | Number of groups | %           |
|-----------------|------------------|-------------|
| 1 person        | 58               | 6           |
| 2 persons       | 421              | 42          |
| 3 persons       | 142              | 14          |
| 4 persons       | 197              | 20          |
| 5 persons       | 55               | 6           |
| > 5 persons     | 118              | 12          |
| 5 – 20 persons  | 109              | 11          |
| 21 – 50 persons | 9                | 1           |
| <b>Total</b>    | <b>991</b>       | <b>100%</b> |

Table 6. Total numbers of tourists

| Group member       | Number of members | %           |
|--------------------|-------------------|-------------|
| Number of women    | 1,768             | 50          |
| Number of men      | 1,356             | 38          |
| Number of children | 412               | 12          |
| <b>Total</b>       | <b>3,537</b>      | <b>100%</b> |

### First time/repeated trip

Number of visits to Sedona: Mean = 4.1

Range: 1 to 104 times

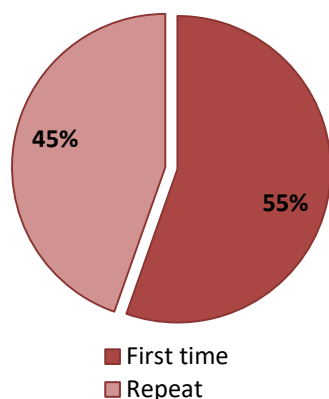


Figure 5. First time and repeated trip

### Group membership

Table 7. Group membership

| Group membership     | Number of groups | %           |
|----------------------|------------------|-------------|
| Family only          | 565              | 57          |
| Friends only         | 219              | 22          |
| Family and Friends   | 141              | 14          |
| Traveling alone      | 39               | 4           |
| Business associates  | 11               | 1           |
| Organized group tour | 10               | 1           |
| <b>Total</b>         | <b>985</b>       | <b>100%</b> |

## Accommodations

Table 8. Accommodations used in Sedona during current trip

| Accommodations                                | Number of groups | %           |
|---|------------------|-------------|
| Full-service hotel                            | 130              | 22          |
| Resort  | 118              | 20          |
| Rented vacation home (Airbnb, HomeAway, VRBO) | 90               | 15          |
| Limited-service hotel, motel                  | 64               | 11          |
| Timeshare                                     | 58               | 10          |
| Campground or RV park                         | 52               | 9           |
| Bed & Breakfast                               | 48               | 8           |
| Staying with friends or relatives             | 44               | 7           |
| <b>Total</b>                                  | <b>604</b>       | <b>100%</b> |

## Trip length

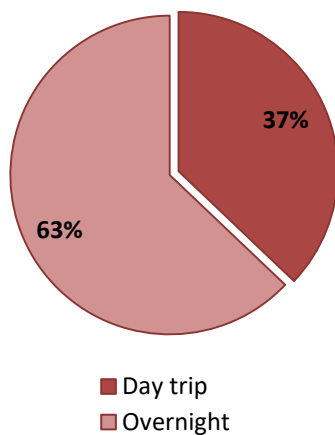


Figure 6. Trip length

*Number of nights away from home*

Mean: 8.6, Mode: 2, Range: 1 to 200

*Number of nights in Sedona*

Mean: 3.5, Mode: 2, Range: 1 to 60

Arizonian groups 58% on day trip, 42% overnight

Out of state groups: 27% on day trip, 73% overnight

## Primary purposes

Table 9. Primary purposes of the trips

| Primary purposes              | Number of groups | %           |
|-------------------------------|------------------|-------------|
| Pleasure/vacation             | 861              | 87          |
| Visit with friends /relatives | 88               | 9           |
| Business trip                 | 21               | 2           |
| Others *                      | 23               | 2           |
| <b>Total</b>                  | <b>993</b>       | <b>100%</b> |

\* Others

Bringing guests, getting married (wedding or attending wedding), Tour guide, Retreat, School trip, Spring Training, Always do a travel story for an auto website from here, Check out NAU, Off-roading, Photography. Spiritual bliss, visiting our new house in Village of Oakcreek, Vortex, Hiking, Visiting the Chapel.



## Activities

Table 10. Leisure activities participated in Sedona

| Activities                                 | Number of groups | %<br>(Out of 1,001 groups) |
|--|------------------|----------------------------|
| Hiking                                     | 724              | 72                         |
| Shopping                                   | 684              | 68                         |
| Sightseeing                                | 683              | 68                         |
| Dining                                     | 657              | 66                         |
| Visiting galleries, museums                | 254              | 25                         |
| Land touring (jeep, hummer, ATV, horse)    | 200              | 20                         |
| Picnicking                                 | 199              | 20                         |
| Vortex visit or tour                       | 169              | 17                         |
| Spiritual, metaphysical activities         | 83               | 8                          |
| Camping                                    | 74               | 7                          |
| Spa treatment                              | 74               | 7                          |
| Biking                                     | 47               | 5                          |
| Golfing                                    | 42               | 4                          |
| Special occasion (e.g. wedding, reunion)   | 35               | 3                          |
| Air touring (e.g. air balloon, helicopter) | 32               | 3                          |
| Special event (e.g. festival, concert)     | 25               | 2                          |
| <i>Others activities *</i>                 | 38               | 4                          |

\* *Other activities:* including Airport/ Flight Sightseeing, Baby moon, Balloon ride, Catholic services, Chapel of Holy Cross, Fishing, getting water, Grand Canyon, Kayaking, Rock climbing, Marathon, Photography, National/State Park, Native American Ruins, Parks, Photography, Planning parade, Raft trip, Spring training, Star gazing, Swimming, Tour of mountains, Verde Canyon Rail Road, Visit wedding venues, Whole Foods, Wind tower, Wine tasting, Yoga

## Rating of destination

Scale of 5 from Poor to Excellent, mean=4.5, no respondents gave rating as Poor.

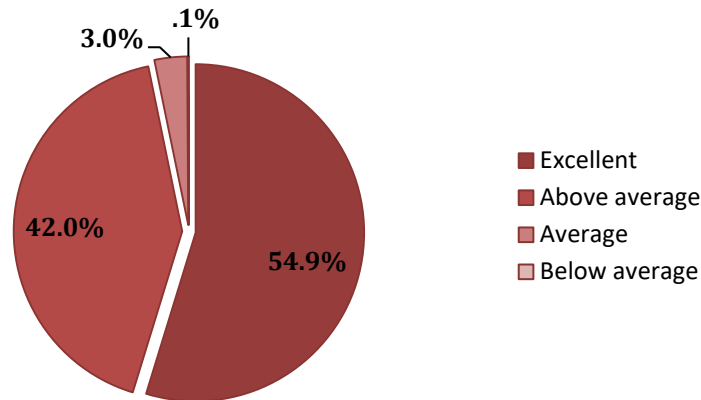


Figure 7. Rating of Sedona as a travel destination

## Sustainability

### Sustainable initiatives

Table 11. Importance of sustainable initiatives

| On a vacation, I look for...  | n   | 1<br>Not<br>important | 2 & 3<br>Moderately<br>important | 4 & 5<br>Very<br>Important | Mean |
|---|-----|-----------------------|----------------------------------|----------------------------|------|
| Parks that promote the "Leave no Trace" principles  | 986 | 3%                    | 16%                              | 81%                        | 4.3  |
| Locally owned and operated tours or attractions that do not put stress on the surrounding environment | 985 | 3%                    | 22%                              | 75%                        | 4.0  |
| Businesses that implement environmental practices   | 979 | 4%                    | 30%                              | 66%                        | 3.8  |
| Low impact transportation options such as public transportation, bike share or pedestrian walkways    | 981 | 6%                    | 33%                              | 61%                        | 3.7  |
| Businesses where spending is retained locally   | 976 | 9%                    | 32%                              | 59%                        | 3.6  |
| Businesses that have a sustainability certification   | 966 | 8%                    | 37%                              | 55%                        | 3.5  |
| Communities recognized by the International Dark Sky Association                                      | 928 | 16%                   | 33%                              | 51%                        | 3.4  |

## Current situation and change in the future

Table 12. Current situation and change in the future

| How do you rate the current situation?               |      | Features of Sedona         | How would you like in the future?                   |      | Difference in Mean (Mean future - Mean current) |
|--|------|----------------------------|---|------|---|
| Scale 1 to 5:<br>Too little/About right/<br>Too much |      |                            | Scale 1 to 5:<br>Want less/Keep as is/<br>Want more |      |   |
| n  | Mean |                            | n   | Mean |   |
| 947  | 3.5  | Amount of traffic          | 918   | 2.5  | -1.0  |
| 944  | 3.4  | Number of tourists         | 908   | 2.8  | -0.6  |
| 896  | 3.3  | Shopping                   | 869   | 3.1  | -0.2  |
| 874  | 3.2  | Built environment          | 852   | 3.0  | -0.2  |
| 894  | 3.1  | Noise                      | 870   | 2.9  | -0.2  |
| 827  | 3.0  | Lighting at night          | 803   | 3.0  | 0.0   |
| 857  | 3.1  | Hotels                     | 836   | 3.1  | 0.0   |
| 867  | 3.1  | Roads                      | 855   | 3.2  | 0.1   |
| 904  | 3.1  | Directional signs          | 881   | 3.2  | 0.1   |
| 902  | 3.1  | Variety of attractions     | 875   | 3.2  | 0.1   |
| 889  | 3.1  | Walking space in town      | 863   | 3.3  | 0.2   |
| 799  | 3.0  | Disabilities access        | 776   | 3.2  | 0.2   |
| 898  | 3.1  | Restaurants                | 877   | 3.3  | 0.2   |
| 877  | 3.1  | Trails                     | 856   | 3.4  | 0.3   |
| 838  | 2.9  | Interaction with residents | 818   | 3.2  | 0.3   |
| 889  | 2.9  | Restrooms                  | 862   | 3.4  | 0.5   |
| 806  | 2.7  | Public transportation      | 787   | 3.4  | 0.7   |
| 871  | 2.6  | Parking lots               | 857   | 3.6  | 1.0   |

| How do you rate the current situation? |      |                     | How would you like in the future?                   |                          |                          |      |
|--|------|---------------------|---|--------------------------|--------------------------|------|
| Scale 1 to 5:<br>Poor to Excellent     |      |                     | Scale 1 to 5:<br>No change to Change for the better |                          |                          |      |
| Total<br>n                             | Mean | Features of Sedona  | Total<br>n  | n – Scale 5              |                          | Mean |
|  |      |                     |   | n – Scale 1<br>No Change | Change for<br>the better |      |
| 905                                    | 3.9  | Authentic culture   | 876   | 204                      | 58                       | 2.6  |
| 914                                    | 4.0  | Safety              | 883   | 208                      | 38                       | 2.6  |
| 924                                    | 4.1  | Air quality         | 891   | 244                      | 66                       | 2.6  |
| 928                                    | 4.2  | Cleanliness         | 895   | 239                      | 64                       | 2.6  |
| 929                                    | 4.3  | Natural environment | 891   | 276                      | 86                       | 2.5  |

## Places in Sedona

Table 13a. Visitation Behaviors at Various Key Tourism Places in Sedona

| Places                             | n   | Visited   | Intentionally<br>visited only<br>during slow<br>time | Avoided<br>because<br>of crowds | Attempted<br>to visit but<br>no parking | Unaware/<br>Not<br>interested |
|------------------------------------|-----|-----------|--|---------------------------------|---|-------------------------------|
| SCC&TB*                            | 745 | 159 (21%) | 20 (3%)  | 14 (2%)                         | 10 (1%)                                 | 542 (73%)                     |
| Red Rock Scenic Byway              | 822 | 492 (60%) | 53 (6%)  | 16 (2%)                         | 9 (1%)                                  | 252 (31%)                     |
| Uptown Sedona                      | 886 | 698 (79%) | 34 (4%)  | 29 (3%)                         | 18 (2%)                                 | 107 (12%)                     |
| Oak Creek Canyon                   | 870 | 646 (74%) | 46 (5%)  | 13 (2%)                         | 6 (1%)                                  | 159 (18%)                     |
| Chapel of the Holy Cross           | 858 | 520 (60%) | 40 (5%)  | 28 (3%)                         | 23 (3%)                                 | 247 (29%)                     |
| Tlaquepaque/Hillside               | 779 | 433 (54%) | 25 (3%)  | 23 (3%)                         | 8 (1%)                                  | 310 (39%)                     |
| Airport Scenic Overlook            | 776 | 269 (35%) | 26 (3%)  | 14 (2%)                         | 13 (2%)                                 | 454 (58%)                     |
| Slide Rock State Park              | 790 | 390 (49%) | 38 (5%)  | 46 (6%)                         | 18 (2%)                                 | 298 (38%)                     |
| Red Rock State Park                | 786 | 449 (57%) | 42 (5%)  | 21 (3%)                         | 14 (2%)                                 | 260 (33%)                     |
| Vortex Sites                       | 741 | 256 (35%) | 29 (4%)  | 16 (2%)                         | 7 (1%)                                  | 432 (58%)                     |
| Red Rock Crossing                  | 763 | 346 (46%) | 24 (3%)  | 22 (3%)                         | 10 (1%)                                 | 361 (47%)                     |
| Palatki & Hononki Heritage<br>Site | 704 | 88 (13%)  | 28 (4%)  | 16 (2%)                         | 8 (1%)                                  | 564 (80%)                     |
| Cathedral Rock Trail               | 757 | 272 (36%) | 30 (4%)  | 15 (2%)                         | 17 (2%)                                 | 423 (56%)                     |
| Soldier Pass Trail                 | 711 | 134 (19%) | 33 (5%)  | 18 (3%)                         | 9 (1%)                                  | 517 (72%)                     |
| Devil's Bridge Trail               | 735 | 202 (28%) | 38 (5%)  | 22 (3%)                         | 23 (3%)                                 | 450 (61%)                     |

\* For the first time of surveying, the survey form doesn't have the Chamber in the list. We added after the first survey day.

## Places in Sedona (Continued)

Table 13b. Places in Sedona, visited and not visited

| Places                          | n   | Visited  | Not visited   |
|---------------------------------|-----|--|---|
|                                 |     | (Visited, intentionally<br>visited only during slow<br>time) | (Avoided because of<br>crowds, attempted to visit<br>but no parking,<br>Unaware/Not Interested) |
| Uptown Sedona                   | 886 | 732 (83%)  | 154 (17%)   |
| Oak Creek Canyon                | 870 | 692 (80%)  | 178 (20%)   |
| Chapel of the Holy Cross        | 858 | 560 (65%)  | 298 (35%)   |
| Red Rock Scenic Byway           | 822 | 545 (66%)  | 277 (34%)   |
| Red Rock State Park             | 786 | 491 (62%)  | 295 (38%)   |
| Tlaquepaque/Hillside            | 779 | 458 (59%)  | 321 (41%)   |
| Slide Rock State Park           | 790 | 428 (54%)  | 362 (46%)   |
| Red Rock Crossing               | 763 | 370 (48%)  | 393 (52%)   |
| Cathedral Rock Trail            | 757 | 302 (40%)  | 455 (60%)   |
| Airport Scenic Overlook         | 776 | 295 (38%)  | 481 (62%)   |
| Vortex Sites                    | 741 | 285 (38%)  | 456 (62%)   |
| Devil's Bridge Trail            | 735 | 240 (33%)  | 495 (67%)   |
| SCC&TB                          | 745 | 179 (24%)  | 566 (76%)   |
| Soldier Pass Trail              | 711 | 167 (23%)  | 544 (77%)   |
| Palatki & Hononki Heritage Site | 704 | 116 (17%)  | 588 (83%)   |

## Segmentation analysis

**Rating of Sedona as travel destinations on a five-point scale (note: no one selected “poor”)**

Table 14. Rating of Sedona as travel destination based on geographic origins of respondents

| <b>Rating</b> | <b>In state respondents</b> | <b>Out of state respondents</b> | <b>Foreign country respondents</b> | <b>n</b>   |
|---------------|-----------------------------|---------------------------------|------------------------------------|------------|
| Below average | 0%                          | 0%                              | 0%                                 | 1          |
| Average       | 3%                          | 3%                              | 2%                                 | 30         |
| Above average | 42%                         | 42%                             | 42%                                | 387        |
| Excellent     | 55%                         | 55%                             | 56%                                | 508        |
| <b>Total</b>  | <b>100%</b>                 | <b>100%</b>                     | <b>100%</b>                        | <b>926</b> |

Table 15. Rating of Sedona as travel destination based on trip characteristics

| <b>Rating</b> | <b>Day trip respondents</b> | <b>Overnight trip respondents</b> | <b>n</b>   |
|---------------|-----------------------------|-----------------------------------|------------|
| Below average | 0%                          | 0%                                | 1          |
| Average       | 4%                          | 2%                                | 30         |
| Above average | 48%                         | 39%                               | 414        |
| Excellent     | 48%                         | 59%                               | 536        |
| <b>Total</b>  | <b>100%</b>                 | <b>100%</b>                       | <b>981</b> |

Table 16. Rating of Sedona as travel destination based on age ranges of respondents

| <b>Rating</b> | <b>Age ranges of respondents</b> |                        |                        |                    | <b>n</b>   |
|---------------|----------------------------------|------------------------|------------------------|--------------------|------------|
|               | <b>18-34 years old</b>           | <b>35-49 years old</b> | <b>50-64 years old</b> | <b>65 and over</b> |            |
| Below average | 0%                               | 0%                     | 0%                     | 1%                 | 1          |
| Average       | 3%                               | 4%                     | 3%                     | 2%                 | 29         |
| Above average | 41%                              | 41%                    | 42%                    | 43%                | 396        |
| Excellent     | 56%                              | 55%                    | 54%                    | 55%                | 521        |
| <b>Total</b>  | <b>100%</b>                      | <b>100%</b>            | <b>100%</b>            | <b>100%</b>        | <b>947</b> |

## Trip characteristics

Table 17. First time/repeated trip to Sedona based on geographic origins of respondents

|                    | In state<br>Respondents | Out of state<br>respondents | Foreign country<br>respondents | n          |
|--------------------|-------------------------|-----------------------------|--------------------------------|------------|
| First-time visitor | 13%                     | 60%                         | 62%                            | 419        |
| Repeat visitor     | 87%                     | 40%                         | 38%                            | 512        |
| <b>Total</b>       | <b>100%</b>             | <b>100%</b>                 | <b>100%</b>                    | <b>931</b> |

Table 18. Day trip and overnight trip based on geographic origins of respondents

| Day trip/Overnight trip | In state<br>Respondents | Out of state<br>respondents | Foreign country<br>respondents | n          |
|-------------------------|-------------------------|-----------------------------|--------------------------------|------------|
| Day trip                | 58%                     | 27%                         | 30%                            | 337        |
| Overnight trip          | 42%                     | 73%                         | 70%                            | 584        |
| <b>Total</b>            | <b>100%</b>             | <b>100%</b>                 | <b>100%</b>                    | <b>921</b> |

Table 19. Activities in Sedona, based on geographic origins of respondents

| Activities                                    | In state<br>respondents | Out of state<br>respondents | Foreign country<br>respondents | n   |
|---|-------------------------|-----------------------------|--------------------------------|-----|
| Hiking  | 21%                     | 17%                         | 16%                            | 670 |
| Sightseeing                                   | 16%                     | 18%                         | 18%                            | 654 |
| Shopping                                      | 18%                     | 17%                         | 17%                            | 641 |
| Dining  | 17%                     | 16%                         | 16%                            | 617 |
| Galleries and museums                         | 5%                      | 6%                          | 9%                             | 233 |
| Land touring (e.g. jeep, hummer, ATV)         | 3%                      | 6%                          | 4%                             | 189 |
| Picnicking                                    | 7%                      | 4%                          | 6%                             | 181 |
| Vortex visit or tour                          | 2%                      | 5%                          | 4%                             | 158 |
| Spiritual metaphysical activities             | 2%                      | 2%                          | 1%                             | 74  |
| Camping                                       | 3%                      | 1%                          | 1%                             | 68  |
| Spa treatment                                 | 1%                      | 2%                          | 2%                             | 68  |
| Biking  | 1%                      | 1%                          | 1%                             | 45  |
| Golfing                                       | 1%                      | 1%                          | 2%                             | 37  |
| Others  | 1%                      | 1%                          | 2%                             | 36  |
| Air touring (e.g. air balloon,<br>helicopter) | 1%                      | 1%                          | 3%                             | 31  |
| Special occasions (e.g. wedding,<br>reunion)  | 1%                      | 1%                          | 0%                             | 30  |
| Special events (e.g. festival, concert)       | 1%                      | 1%                          | 1%                             | 22  |
| <b>Total</b>                                  | <b>100%</b>             | <b>100%</b>                 | <b>100%</b>                    |     |

## Group size

Table 20. Group size based on geographic origins of groups

| Group size   | In state groups | Out of state groups | Foreign country groups | n          |
|--------------|-----------------|---------------------|------------------------|------------|
| 1 person     | 6%              | 6%                  | 4%                     | 53         |
| 2 persons    | 41%             | 42%                 | 44%                    | 388        |
| 3 persons    | 20%             | 12%                 | 10%                    | 133        |
| 4 persons    | 15%             | 21%                 | 31%                    | 186        |
| 5 persons    | 6%              | 6%                  | 5%                     | 54         |
| > 5 persons  | 12%             | 13%                 | 6%                     | 112        |
| <b>Total</b> | <b>100%</b>     | <b>100%</b>         | <b>100%</b>            | <b>926</b> |

## Crowding

Table 21. Residents' perceptions of crowding in Sedona per month of survey

| Crowding indicators                           |                           | Month of survey (Mean) |     |     |     |     |     |     |
|---|---------------------------|------------------------|-----|-----|-----|-----|-----|-----|
|   |                           | Jan                    | Feb | Mar | Apr | May | Jun | Jul |
| Number of tourists                            | Current situation         | 3.4                    | 3.4 | 3.3 | 3.5 | 3.3 | 3.2 | 3.2 |
|   | Expected change in future | 2.9                    | 2.8 | 2.8 | 2.7 | 2.9 | 2.8 | 2.9 |
| Amount of traffic                             | Current situation         | 3.4                    | 3.6 | 3.6 | 3.8 | 3.5 | 3.3 | 3.3 |
|   | Expected change in future | 2.6                    | 2.5 | 2.6 | 2.3 | 2.6 | 2.6 | 2.8 |
| Noise   | Current situation         | 3.1                    | 3.1 | 3.1 | 3.1 | 3.1 | 3.1 | 3.0 |
|   | Expected change in future | 2.8                    | 2.9 | 2.9 | 3.0 | 2.8 | 2.8 | 2.9 |
| <b>Rating of Sedona as travel destination</b> |                           | 4.5                    | 4.5 | 4.4 | 4.5 | 4.7 | 4.5 | 4.6 |

*Current situation scale: (1) Too little/-/ (3) About right/-/ (5) Too much*

*Change in future scale: (1) Want less/-/ (3) Keep as is/-/ (5) Want more*

*Rating of destination: (1) Poor - (2) Below average - (3) Average - (4) Above average - (5) Excellent*

### Center for Sustainable Tourism

411 N. Central Ave, suite 550

Phoenix, AZ 85004

[scrd.asu.edu/sustainabletourism](http://scrd.asu.edu/sustainabletourism)

### Nichols Tourism Group

16 Tee Place

Bellingham, WA 98229

[nicholstourismgrp.com](http://nicholstourismgrp.com)



# Visitor Survey



## Sedona Sustainable Tourism Survey

The study is conducted by Arizona State University for the Sedona Chamber of Commerce & Tourism Bureau. To be eligible for the study, you must be 18 or older. Your participation is voluntary. Return of this questionnaire will be considered your consent to participate. You are assured of complete anonymity and confidentiality.

If you have any questions, please contact Dr. Christine Vogt at Christine.vogt@asu.edu or the ASU Office of Research Integrity and Assurance, at (480) 965-6788.

### Part I: Trip characteristics

- Have you ever visited Sedona before today? (Please circle one)
  - ☐ No
  - ☐ Yes
 - (please fill in a number)  
 Number of visits: \_\_\_\_ visits, including this trip
- What is the primary purpose of your trip? (Please circle one)
  - ☐ Pleasure/Vacation
  - ☐ Business trip
  - ☐ Visit with friends or relatives
  - ☐ Other, please specify: \_\_\_\_\_
- Is the entire length of this trip away from home a day or a multi-day trip? (Please circle one)
  - ☐ A day trip only
  - ☐ A multi-day/overnight trip
 - (please fill in a number for each)  
 Number of nights away from home: \_\_\_\_ nights  
  
 Number of nights in Sedona: \_\_\_\_ nights  
 - (Please circle one)  
 In Sedona, which type of accommodations did you choose?
  - ☐ Day trip only
  - ☐ Timeshare
  - ☐ Resort
  - ☐ Full-service hotel
  - ☐ Limited-service hotel, motel
  - ☐ Bed & Breakfast
  - ☐ Campground or RV park
  - ☐ Rented vacation home (e.g. Airbnb, HomeAway, VRBO)
  - ☐ Staying with friends or relatives
- Including yourself, how many people are in your travel party? (Please fill in a number for each)
  - \_\_\_\_ # of Women
  - \_\_\_\_ # of Men
  - \_\_\_\_ # of Children
- Who is traveling with you on this trip? (Please circle one)
  - ☐ Friends only
  - ☐ Family and Friends
  - ☐ Business associates
  - ☐ Family only
  - ☐ Organized group tour
  - ☐ Traveling alone

- Which of the following leisure activities have you participated in or will you likely participate in during your visit or stay in Sedona? (Please check all that apply)
  - ☐ Shopping
  - ☐ Hiking
  - ☐ Biking
  - ☐ Golfing
  - ☐ Camping
  - ☐ Picnicking
  - ☐ Dining
  - ☐ Sightseeing
  - ☐ Spa treatment
  - ☐ Vortex visit or tour
  - ☐ Special event (e.g. festival, concert)
  - ☐ Land touring (e.g. jeep, hummer, ATV, horseback)
  - ☐ Air touring (e.g. air balloon, helicopter)
  - ☐ Spiritual, metaphysical activities
  - ☐ Special occasion (e.g. wedding, reunion)
  - ☐ Visiting galleries, museums
  - ☐ Other, please specify: \_\_\_\_\_

### Part II: Opinions about sustainability

- Overall, how would you rate Sedona as a travel destination? (Please circle one)
  - ☐ Poor
  - ☐ Below average
  - ☐ Average
  - ☐ Above average
  - ☐ Excellent
- Please indicate how important each of the following statements is to you. (Circle one response for each statement)

| On a vacation, I look for...  | 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              |
| Communities recognized by the International Dark Sky Association                                      | 1             | 2 | 3                    | 4 | 5              |

Turn to the second page →

9. Sedona has many features and conditions for tourists to experience. First, in the left column indicate your opinion about the current situation in Sedona. Second, in the right column indicate how would you like each feature to change in the future. *(Circle one number in each column)*

| How do you rate the current situation? |             |   |   |          | Features of Sedona         | How would you like in the future? |            |                              |   |   |
|--|-------------|---|---|----------|----------------------------|-----------------------------------|------------|------------------------------|---|---|
| Too little                             | About right |   |   | Too much |                            | Want less                         | Keep as is | Want more                    |   |   |
| 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        | Walking space in town      | 1                                 | 2          | 3                            | 4 | 5 |
| 1                                      | 2           | 3 | 4 | 5        | Roads                      | 1                                 | 2          | 3                            | 4 | 5 |
| 1                                      | 2           | 3 | 4 | 5        | Built environment          | 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        | Shopping                   | 1                                 | 2          | 3                            | 4 | 5 |
| 1                                      | 2           | 3 | 4 | 5        | Hotels                     | 1                                 | 2          | 3                            | 4 | 5 |
| 1                                      | 2           | 3 | 4 | 5        | Restaurants                | 1                                 | 2          | 3                            | 4 | 5 |
| 1                                      | 2           | 3 | 4 | 5        | Restrooms                  | 1                                 | 2          | 3                            | 4 | 5 |
| 1                                      | 2           | 3 | 4 | 5        | Noise                      | 1                                 | 2          | 3                            | 4 | 5 |
| 1                                      | 2           | 3 | 4 | 5        | Lighting at night          | 1                                 | 2          | 3                            | 4 | 5 |
| 1                                      | 2           | 3 | 4 | 5        | Interaction with residents | 1                                 | 2          | 3                            | 4 | 5 |
| <b>Poor</b> <b>Excellent</b>           |             |   |   |          | <b>Features of Sedona</b>  | <b>No change</b>                  |            | <b>Change for the better</b> |   |   |
| 1                                      | 2           | 3 | 4 | 5        | Authentic culture          | 1                                 | 2          | 3                            | 4 | 5 |
| 1                                      | 2           | 3 | 4 | 5        | Safety                     | 1                                 | 2          | 3                            | 4 | 5 |
| 1                                      | 2           | 3 | 4 | 5        | Air quality                | 1                                 | 2          | 3                            | 4 | 5 |
| 1                                      | 2           | 3 | 4 | 5        | Cleanliness                | 1                                 | 2          | 3                            | 4 | 5 |
| 1                                      | 2           | 3 | 4 | 5        | Natural environment        | 1                                 | 2          | 3                            | 4 | 5 |

10. Below is the list of places in Sedona, please indicate whether you visited, avoided or attempted to visit on this trip to Sedona *(Please ✓ all that apply)*

| Places                               | Visited                  | Intentionally visited only during slow time | Avoided because of crowds | Attempted to visit but no parking | Unaware/ Not interested  |
|--------------------------------------|--------------------------|---|---------------------------|-----------------------------------|--------------------------|
| Chamber of Commerce - Visitor Center | <input type="checkbox"/> | <input type="checkbox"/>                    | <input type="checkbox"/>  | <input type="checkbox"/>          | <input type="checkbox"/> |
| Red Rock Scenic Byway                | <input type="checkbox"/> | <input type="checkbox"/>                    | <input type="checkbox"/>  | <input type="checkbox"/>          | <input type="checkbox"/> |
| Uptown Sedona                        | <input type="checkbox"/> | <input type="checkbox"/>                    | <input type="checkbox"/>  | <input type="checkbox"/>          | <input type="checkbox"/> |
| Oak Creek Canyon                     | <input type="checkbox"/> | <input type="checkbox"/>                    | <input type="checkbox"/>  | <input type="checkbox"/>          | <input type="checkbox"/> |
| Chapel of the Holy Cross             | <input type="checkbox"/> | <input type="checkbox"/>                    | <input type="checkbox"/>  | <input type="checkbox"/>          | <input type="checkbox"/> |
| Tlaquepaque/Hillside                 | <input type="checkbox"/> | <input type="checkbox"/>                    | <input type="checkbox"/>  | <input type="checkbox"/>          | <input type="checkbox"/> |
| Sedona Airport Scenic Overlook       | <input type="checkbox"/> | <input type="checkbox"/>                    | <input type="checkbox"/>  | <input type="checkbox"/>          | <input type="checkbox"/> |
| Slide Rock State Park                | <input type="checkbox"/> | <input type="checkbox"/>                    | <input type="checkbox"/>  | <input type="checkbox"/>          | <input type="checkbox"/> |
| Red Rock State Park                  | <input type="checkbox"/> | <input type="checkbox"/>                    | <input type="checkbox"/>  | <input type="checkbox"/>          | <input type="checkbox"/> |
| Vortex Sites                         | <input type="checkbox"/> | <input type="checkbox"/>                    | <input type="checkbox"/>  | <input type="checkbox"/>          | <input type="checkbox"/> |
| Red Rock Crossing                    | <input type="checkbox"/> | <input type="checkbox"/>                    | <input type="checkbox"/>  | <input type="checkbox"/>          | <input type="checkbox"/> |
| Palatki & Hononki Heritage Sites     | <input type="checkbox"/> | <input type="checkbox"/>                    | <input type="checkbox"/>  | <input type="checkbox"/>          | <input type="checkbox"/> |
| Cathedral Rock Trail                 | <input type="checkbox"/> | <input type="checkbox"/>                    | <input type="checkbox"/>  | <input type="checkbox"/>          | <input type="checkbox"/> |
| Soldier Pass Trail                   | <input type="checkbox"/> | <input type="checkbox"/>                    | <input type="checkbox"/>  | <input type="checkbox"/>          | <input type="checkbox"/> |
| Devil's Bridge Trail                 | <input type="checkbox"/> | <input type="checkbox"/>                    | <input type="checkbox"/>  | <input type="checkbox"/>          | <input type="checkbox"/> |

### Part III: Visitor socio-demographics

11. If your residence is in the US, please write your postal code (zip)? \_\_\_\_\_

12. If you are not from the US, please list your country of origin? \_\_\_\_\_

13. What is your age? \_\_\_\_\_ years old

14. Are you: ☐ Female ☐ Male

**Thank you so much for your participation!**

Visitor Survey / Site: \_\_\_\_\_

Date: \_\_\_\_\_ Time: \_\_\_\_\_ Surveyor initials: \_\_\_\_\_