

Resident Survey Research

ASU and the CST conducted a series of new surveys to gauge local attitudes about tourism and potential sustainable practices. These included resident, business, and visitor surveys, as well as focus groups with public land entities and area nonprofits. Full survey results are presented as appendices to the report.

Resident data were collected during June and July of 2018. A random sample of 1,000 homeowners in the City of Sedona received an eight-page mail survey from ASU researchers. **376 were returned; a response rate of 38%**. 73% of owner addresses were in Sedona; 8% elsewhere in Arizona. The balance went to residents whose primary mailing addresses are in other locations in the U.S.

Demographics

- The average age of the respondents was **67**. The largest age segment was baby boomers, ages **54-72 (65%)**.
- Women (**52%**) respondents were slightly more common than men (**48%**).
- Most respondents were highly educated (**76%** with a college degree) and financially well-off (**41%** with incomes of \$100,000 or more).
- Most respondents noted they were full-time residents of Sedona (**74%**) and lived here for an average of **15** years.
- Most visited either as a tourist (**85%**) and/or for business (**24%**) before moving to the community.
- Their experience as a visitor was highly influential on the decision to move to Sedona, with **58%** indicating that it influenced their decision either quite a bit or a lot.

Residents' Role with Tourism

Engagement with tourism is associated with how residents feel about tourism in their communities. Therefore, Sedona residents were asked about their involvement in tourism.

- Few residents indicate they give input on tourism decision making, with **38%** reporting very little involvement and **33%** reporting no involvement. Just **4%** report a lot of involvement.
- While most residents provide limited input on tourism-related matters, most have contact with tourists, with only **12%** noting they have no contact and **45%** indicating they have moderate to a lot of contact.
- A small group report that they are directly (**9%**) or indirectly (**9%**) employed in tourism.
- Many residents (**61%**) had out-of-town guests stay with them in 2017, with an average of 6.5 guests.
- **8%** indicate they have paying customers stay, with an average of 4.8 guests.

Tourism's Economic Impact

Residents were asked about tourism's role in Sedona's economy and appeared fairly knowledgeable about the economic implications of tourism. When asked to estimate the percentage of jobs in Sedona attributed to tourism:

- **48%** of respondents believe that **61-80%** of Sedona's jobs are tourism related.
- **26%** believe **41-60%** of jobs are tourism related.
- Residents recognize tourism as an important contributor to the city's operating budget, with **42%** stating a belief that **61-80%** of the budget comes from visitor spending, and **29%** believing **41-60%** comes from visitors.

Tourism's Quality of Life Role and Future Role

Residents are aware of the influence of tourism on community amenities. Large percentages indicate tourism has a great impact on five amenities:

- Variety of restaurants **91%**
- Variety of festivals and events **80%**
- Variety of retail/shopping **71%**
- Variety of outdoor recreation opportunities **71%**
- Variety of museums/arts/cultural venues and activities **61%**

Residents were asked about the role tourism should play in Sedona's economy going forward.

- **43%** say it should retain its current role
- **50%** feel tourism should have a lesser role
- Few believe it should have either a greater role (**6%**) or no role (**1%**)

Residents were asked to rank the acceptability of expanding several types of tourism development on a five-point scale, with four and five being higher levels of acceptability, and one being 'not acceptable.'

The most acceptable type of tourism products lean toward outdoor experiences and include:

- State/national parks and heritage sites **4.3**
- Non-motorized trails **4.2**
- Archaeological sites **4.0**
- Outdoor recreation **4.0**
- Public transportation **4.0**

The least acceptable types of tourism products lean toward additional accommodations and include:

- Motorized trails **2.2**
- Airbnb **2.4**
- Hotels/motels (**2.8**) and resorts (**2.9**)

TABLE 3-6: 2018 TOURISM'S IMPACTS TO DIVERSITY OF AMENITIES
SOURCE: ASU – CST RESIDENT SURVEY

Community Amenities	n	1 None	2 Little	3 Great	Mean
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

TABLE 3-7: ACCEPTABILITY FOR ADDITIONAL INTEREST AND DEMAND
SOURCE: ASU – CST RESIDENT SURVEY

Expanded Interest and Demand For:	n	1 Not	2 & 3 Moderate	4 & 5 Very	Mean
State/National Parks, Heritage Sites	345	3%	15%	82%	4.3
Trails – Non-motorized	346	5%	16%	79%	4.2
Archaeological 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 Breweries	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

TABLE 3-8: ACCEPTABILITY OF ECONOMIC DEVELOPMENT OPTIONS
SOURCE: ASU – CST RESIDENT SURVEY

Economic Activities	n	1 Not	2 & 3 Moderate	4 & 5 Very	Mean
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

Residents were asked to rank the acceptability of several kinds of economic development options on a five-point scale.

The most acceptable options include:

- Medical and health **4.4**
- Higher education **4.2**
- Craft beverages **4.0**
- Professional services **4.0**

The least acceptable options include:

- Light manufacturing (**2.6**) and Construction (**2.9**)

Tourism and outdoor recreation rank at the high end of moderately acceptable (**3.7**)

Residents were asked about the current situation in Sedona and desired future conditions.

On average, all of the Sedona’s current features are in the range of **2.0-4.6**, where 3 means “about right,” 1 means “too little/few,” and 5 means “too much/many.”

The items that fall into the “too much/many” categories:

- Amount of traffic
- Number of tourists

Residents are fairly strong in wanting less of both of these elements in the future. They feel the same about noise and lighting at night, though somewhat less strongly.

Items of which residents say Sedona has “too little”:

- Public transportation
- Community walkability

Items that rank as being “about right”:

- Variety of attractions
- Restaurants
- Directional signage

TABLE 3-9: ACCEPTABILITY OF ECONOMIC DEVELOPMENT OPTIONS

SOURCE: ASU – CST RESIDENT SURVEY

How do you rate the current situation?		Community Characteristics	How much would you like to see in the future?		Difference Future – Current (Mean)
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