

# Visitor Survey Research

ASU researchers conducted a two-page on-site survey with visitors at six locations in town and at popular attractions and trailheads from January to July 2018. Surveys were administered over 14 randomly-selected weekdays and weekends during 215 hours of field work. **1,657 visitors were approached and 1,001 surveys were completed, a 60% response rate.**

## Demographics

- The average age of the respondent was **47**, with the largest age groups being **50-64 (30%)** and **18-34 (28%)**.
- Women (**53%**) respondents were slightly more common than men (**47%**).
- **9 out of 10** visitors (**91%**) were from the U.S. and **9%** were international. Canada comprised **69%** of the international visitor segment.
- Of the U.S. respondents, **35%** were from Arizona. California residents (**14%**) comprised the second largest U.S. segment.
- Average party size was **3.6** persons and ranged from one person to as many as 50. The most common group size was two persons.
- Most visitors (**63%**) stayed overnight in the Sedona area. **37%** were day visitors.
- Those who stayed overnight averaged **3.5** nights in Sedona. The most common length was **2** nights.
- Arizona residents were more likely to be on a day trip (**58%**) than an out-of-state travel party.
- Hiking is the most popular activity in the visitor survey (**72%**), followed by shopping (**68%**), sightseeing (**68%**) and dining (**66%**).

## Visitor Satisfaction

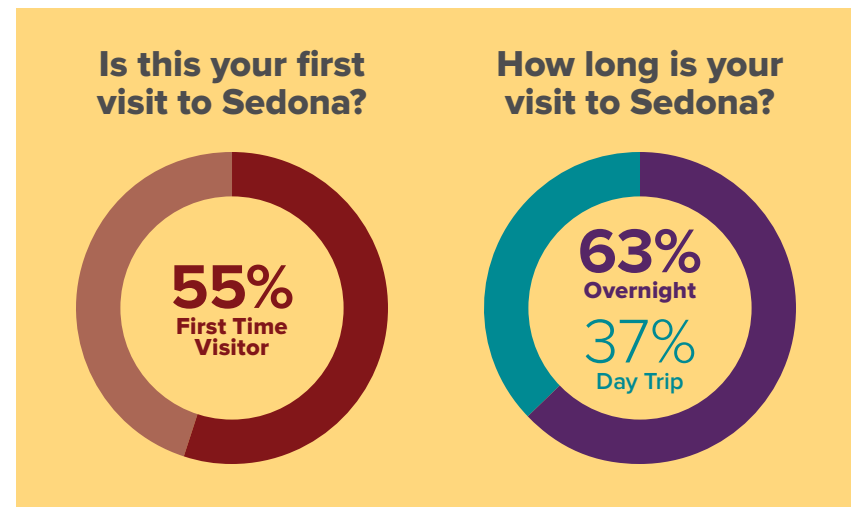
- **55%** of visitor respondents rate Sedona as “excellent.”
- **42%** rate the destination as “above average.”
- **3%** Sedona rate as “average.”
- No one gave the destination a “below average” rating.
- Overnight visitors have significantly higher satisfaction (**59%** “excellent”) than day trip visitors (**48%** “excellent”).

In-state visitors were twice as likely to be repeat visitors compared to out-of-state or foreign visitors. Out-of-state and foreign visitors were somewhat more likely to be first-time visitors, with **6 of 10** indicating a first trip to Sedona.

Out-of-state (**73%**) and foreign (**70%**) visitors were much more likely than in-state residents (**42%**) to stay overnight in Sedona.

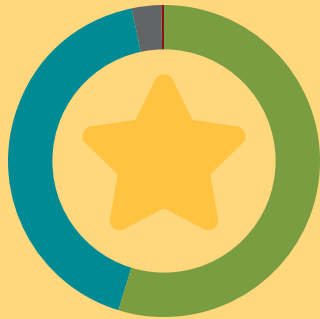
**FIGURE 3-7: VISITOR TRIP ORIENTATION**

SOURCE: ASU – CST VISITOR SURVEY



**FIGURE 3-8: VISITOR SATISFACTION**

SOURCE: ASU – CST VISITOR SURVEY



**54.9%**  
Excellent

**3%**  
Average

**42%**  
Above Average

**0.1%**  
Below Average

**TABLE 3-14: IMPORTANCE OF SUSTAINABLE INITIATIVES**

SOURCE: ASU – CST VISITOR SURVEY

On a vacation, I look for...	n	1 Not	2 & 3 Moderate	4 & 5 Very	Mean
Parks that promote the <i>Leave No Trace</i> 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 sustainability certification	966	8%	37%	55%	3.5
Communities recognized by the International Dark Sky Association	928	16%	33%	51%	3.4

SCALE: (1) Not Important - - - (3) Moderately Important - - - (5) Very Important

## Sustainability Interests

Visitors were asked about the importance of sustainability practices at their vacation destinations.

- “*Leave No Trace* principles in parks and on public lands” rates highest (**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 is next (**4.0** mean).
- Two lower-rated practices are sustainability certification by businesses (**3.5** mean) and communities recognized by the **International Dark-Sky Association** (**3.4** mean).

Visitors were asked about the current situation in Sedona and desirable future conditions.

On average, current Sedona features range from **2.6-3.5**, where 3 means “about right.”

Regarding future desirability, items skewing toward “want less” include amount of traffic and number of tourists. Items skewing toward “want more” include parking lots, public transportation, and restrooms.

The most-visited places are **Uptown** (**79%** visited) and **Oak Creek Canyon** (**74%**).

From **1-3%** of visitors attempt to visit a place in Sedona and can’t find parking, including in **Uptown** and **Tlaquepaque**. **2-6%** avoid a place because of crowds. Only **3-6%** indicate intentionally visiting a place during a slow period. These findings suggest there is strong potential to influence how and when visitors experience destination attractions.

**TABLE 3-15: FEATURES OF SEDONA – CURRENT CONDITIONS/FUTURE DESIRES**

SOURCE: ASU – CST VISITOR SURVEY

How do you rate the current situation?		Features of Sedona	How much would you like to see in the future?		
n	Mean		n	Mean	(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

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

**TABLE 3-16: VISITOR BEHAVIORS IN VISIT ACTIVITY**  
**SOURCE: ASU – CST VISITOR SURVEY**

Places	n	Visited	Intentionally visited only during slow time	Avoided because of crowds	Attempted to visit but no parking	Unaware or not 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 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%)

\*The Chamber was added after the first survey day, as it was not included in the form on the first day of surveying.