AGENDA 2:00 P.M.

CITY COUNCIL MEETING WEDNESDAY, MARCH 27, 2024

NOTES:

- Meeting room is wheelchair accessible. American Disabilities Act (ADA) accommodations are available upon request. Please phone 928-282-3113 at least two (2) business days in advance.
- City Council Meeting Agenda Packets are available on the City's website at:

www.SedonaAZ.gov

THE MEETING CAN BE VIEWED LIVE ON THE CITY'S WEBSITE AT WWW.SEDONAAZ.GOV OR ON CABLE CHANNEL 4.

GUIDELINES FOR PUBLIC COMMENT

PURPOSE:

- To allow the public to provide input to the City Council on a particular subject scheduled on the agenda.
- This is not a question/answer session.
- The decision to receive Public Comment during Work Sessions/Special City Council meetings is at the discretion of the Mayor.

PROCEDURES:

- Fill out a "Comment Card" and deliver it to the City Clerk.
- When recognized, use the podium/microphone.
- State your:
  1. Name and
  2. City of Residence
- Limit comments to **3 MINUTES.**
- Submit written comments to the City Clerk.

1. CALL TO ORDER/PLEDGE OF ALLEGIANCE/MOMENT OF SILENCE

2. ROLL CALL

3. SPECIAL BUSINESS

LINK TO DOCUMENT =

a. AB 3037 **Presentation/discussion/possible direction** on the Tourism Program's research results, draft brand description, results of the winter destination marketing campaign, concepts for the summer destination marketing campaign and media plan.

b. **Discussion/possible action** regarding ideas for future meetings/agenda items.

4. EXECUTIVE SESSION

Upon a public majority vote of the members constituting a quorum, the Council may hold an Executive Session that is not open to the public for the following purposes:

a. To consult with legal counsel for advice regarding matters listed on this agenda per A.R.S. § 38-431.03(A)(3).

b. Return to open session. **Discussion/possible action** regarding executive session items.

5. ADJOURNMENT

Posted: 03/21/2024

By: DJ

JoAnne Cook, CMC, City Clerk

Note: Pursuant to A.R.S. § 38-431.02(B) notice is hereby given to the members of the City Council and to the general public that the Council will hold the above open meeting. Members of the City Council will attend either in person or by telephone, video, or internet communications. The Council may vote to go into executive session on any agenda item, pursuant to A.R.S. § 38-431.03(A)(3) and (4) for discussion and consultation for legal advice with the City Attorney. Because various other commissions, committees and/or boards may speak at Council meetings, notice is also given that four or more members of these other City commissions, boards, or committees may be in attendance.

A copy of the packet with material relating to the agenda items is typically available for review by the public in the Clerk's office after 1:00 p.m. the Thursday prior to the Council meeting and on the City's website at www.SedonaAZ.gov. The Council Chambers is accessible to people with disabilities, in compliance with the Federal 504 and ADA laws. Those with needs for special typeface print, may request these at the Clerk's Office. All requests should be made **forty-eight hours** prior to the meeting.

NOTICE TO PARENTS AND LEGAL GUARDIANS: Parents and legal guardians have the right to consent before the City of Sedona makes a video or voice recording of a minor child, pursuant to A.R.S. § 1-602(A)(9). The Sedona City Council meetings are recorded and may be viewed on the City of Sedona website. If you permit your child to attend/participate in a televised City Council meeting, a recording will be made. You may exercise your right not to consent by not allowing your child to attend/participate in the meeting.

CITY COUNCIL CHAMBERS
102 ROADRUNNER DRIVE, SEDONA, AZ

The mission of the City of Sedona government is to provide exemplary municipal services that are consistent with our values, history, culture and unique beauty.

CITY COUNCIL AGENDA BILL

AB 3037
March 27, 2024
Special Business

Agenda Item: 3a
Proposed Action & Subject: Presentation/discussion/possible direction on the Tourism Program's research results, draft brand description, results of the winter destination marketing campaign, concepts for the summer destination marketing campaign and media plan.

Department	Communications / Tourism
Time to Present	3 hours
Total Time for Item	4 hours
Other Council Meetings	N/A
Exhibits	A. Brand & Marketing Research Report B. Resident Sentiment Report C. Awareness and Perception Report D. Visitor Intercept Report E. Tourism Program data update F. Winter Marketing Campaign Results G. Brand Platform H. Summer Stewardship Campaign concepts I. Summer Stewardship Media Plan

Finance Approval	Reviewed 3/18/24 CRW
City Attorney Approval	Reviewed 3/18/24 KWC
City Manager's Recommendation	For information, discussion and direction only.

Expenditure Required	
$	150,000 (estimate for summer marketing campaign)
Amount Budgeted	
$	150,000 (FY25 proposed budget)
Account No. (Description)	10-5227-72-6511 (Advertising)

BACKGROUND

The City created an in-house Tourism Program in the summer of 2023, and as part of that effort, hired the marketing firm DVA to assist with establishing the new program's brand, creating a marketing plan and developing destination marketing campaigns. The completed brand, expected in late summer, will define Sedona as a tourism destination and lead to strategic, thoughtful and targeted marketing. The complete brand will be accompanied by a marketing plan that includes destination marketing, travel trade and media relations.

Research results summary and data update

A key component of the City taking on the role of Destination Marketing & Management Organization (DMMO) for Sedona is ensuring that the brand, planning, and creative are data-driven and reflect the wants, needs, and desires of the various stakeholders within and surrounding the City. With that in mind, the City embarked on an aggressive research effort to build a current, robust set of qualitative and quantitative data around tourism in Sedona.

On March 27, 2024, staff will present a summary of findings from the Brand & Marketing Research Report (Exhibit A), which includes input from residents, key stakeholders, the City Councilors, the Lodging Council, the Tourism Advisory Board, and the President of the Sedona Chamber of Commerce. The report also considers the results of three surveys conducted: the Resident Sentiment Report (Exhibit B), the nationwide Awareness and Perception Report (Exhibit C), and the December 2023 Visitor Intercept Report (Exhibit D).

Staff will also present a Tourism Program data update (Exhibit E) for the month of January 2024, the most recent month for which complete data is available.

Winter Marketing Campaign results

Staff and DVA will also present results from the City's winter marketing campaign (Exhibit F). The campaign was all-digital and entirely attribution-based, allowing staff to measure return on investment (ROI) and demonstrate the efficacy of marketing during seasonal need periods. Essentially, the campaign results tell the story of how many people were served the ads and then visited Sedona, either as day-trippers or overnight guests.

The campaign ran from Nov. 15, 2023 to Feb. 1, 2024 for fly markets and to Feb. 15, 2024 for drive markets, with the intention of tracking visitation and overnight stays from December to the end of February. The campaign was titled Sunshine to Spare, the concept being that while we can't guarantee winter will be warm in Sedona, we can assure visitors there will be plenty of sunshine, thus making it a great winter destination.

Campaign results include data received through Feb. 10, 2024, and show greater than 8:1 ROI on a $50,000 ad spend. Due to the time lag in reporting, it is assumed the ROI will continue to increase. Through Feb. 10, the campaign resulted in 1,043 total trips and 1,744 total visitor days in the destination with the top origin markets being San Diego, Chicago and Minneapolis. For overnight stays, the campaign resulted in 326 total trips to hotels with 701 room nights observed and an average length stay of 2.2 days. The top origin markets for overnight stays are San Diego, Chicago and San Francisco.

Draft Brand Description

DVA will also present the *draft* Brand Description (Exhibit G). The Brand Description is part of the foundational platform upon which all future stewardship and marketing efforts will be created and measured, including the development of more familiar aspects of a brand such as a logo and tagline. Development of the Brand Description is rooted in the extensive public feedback that was collected during the research phase of the branding effort. As such, the goal of the

Brand Description is to represent the voices of all stakeholders and specifically identify with residents and visitors alike.

Summer Stewardship Campaign creative concepts

Council will have the opportunity to review and provide direction on the Summer Stewardship Campaign creative concepts (Exhibit H). Staff and DVA consider this a “bridge campaign”, meaning it will deliver a targeted message using current brand resources while the full brand is still under development. The campaign does not represent the full Sedona brand but will bridge the gap until the full brand is complete—and thereby not lose the opportunity to support the tourism economy this summer. The intention behind this campaign is to deliver a stewardship message, being more direct with visitors about welcoming them to Sedona during need periods and conveying what type of behavior is expected while they’re here.

Summer Stewardship Media Plan

Council will also review the Summer Stewardship Media Plan (Exhibit I), which outlines how the Summer Campaign will be executed. DVA’s assessment compared top summer markets over the last four years with top spend markets during the summer months, and produced the following list of markets recommended for targeted marketing:

Primary markets	Emerging markets	In-market
Phoenix Los Angeles Tucson New York Chicago Dallas San Diego	Seattle San Francisco Las Vegas Denver	Sedona plus 25-mile radius

The majority of the campaign will be digital and trackable, similar to the winter campaign, with a total allocated budget of $150,000 for the summer media plan, $100,000 of which will go to media costs (80% out-of-market, 20% in-market) and $50,000 to production and management. Depending on deadlines, there may also be print iterations of the campaign as part of the Arizona Office of Tourism Co-op program that the City joined last year.

Additional factors for consideration regarding the summer media plan

Through the Greater Sedona Business Improvement District (BID), the Chamber of Commerce is planning a summer marketing campaign promoting participating hotels. Chamber of Commerce representatives initially indicated that the BID campaign would use mostly digital advertising in the Phoenix and Southern California markets with an approximate budget of $250,000 for advertising and creative. A stewardship message was not included, as the goal of the BID campaign is to market the businesses and not the destination. However, it is generally understood that a beautiful image of the Sedona landscape will attract more attention and “clicks” than an image of a hotel, so staff anticipates, and Chamber of Commerce representatives have indicated, that destination marketing will be included in the BID campaign.

Since that initial correspondence, after multiple requests to coordinate summer campaigns and an invitation from staff to the Chamber President and CEO to attend the City Council meeting on March 27, 2024, staff were notified that the plans and execution of the BID campaign will not be discussed with anyone outside of the BID, including City staff. The BID Committee also stated that the City should proceed with its own campaign independently of the BID, and the BID will proceed independently from the City. Staff notes that this position undermines the previous understanding that the City and Chamber of Commerce would coordinate and collaborate on marketing efforts. In the interest of serving all stakeholders in Sedona's tourism economy, staff remains open to and will continue advocating for a collaborative and cooperative relationship with the Chamber of Commerce.

Staff seeks direction from Council regarding the potential for overlap between the two campaigns running concurrently in Phoenix and Southern California. Staff and DVA will present additional options for the City's summer media plan, including staying out of Phoenix and Southern California and/or delivering the stewardship message in-market only.

It may be worth noting that the City and Chamber of Commerce are not the only two organizations promoting the destination. Some Sedona businesses conduct their own marketing campaigns, independent of and in addition to the Chamber of Commerce or the City's tourism program. This further underscores the importance of the City delivering a stewardship message, especially to the primary markets that will likely be targeted by other organizations with a come-one-come-all message. The City's decision to market the destination and to whom is only part of a diverse marketing landscape.

<u>Climate Action Plan/Sustainability Consistent:</u> ☐Yes - ☐No - ☒Not Applicable

<u>Board/Commission Recommendation:</u> ☒Applicable - ☐Not Applicable

Staff and DVA presented these materials to the Tourism Advisory Board on March 6, 2024. Based on nearly unanimous votes, the TAB made the following recommendations to City Council:

<u>Draft Brand Description</u>

The following recommendations are already incorporated into the revised Brand Description presented to City Council:

- Include Native American heritage
- Include dark skies/astro-tourism
- Add businesses to the "vibrant tapestry"
- Add "to live, work and visit" to the "…special place to love…"
- Change "no place as precious" to "no place more precious"
- Add shopping to the lodging, dining, arts, and culture scene
- Remove National Park reference

<u>Summer Stewardship Campaign creative concepts and Summer Stewardship Media Plan</u>

The TAB unanimously recommends funding the Concept 2 "soft messaging" option and executing the summer campaign as described in the Media Plan, including the Phoenix and

Los Angeles markets. Despite staff expressing concerns about duplicative marketing with the Chamber of Commerce and the known negative resident sentiment regarding any marketing of Sedona, the TAB stood by their unanimous recommendation to soften the messaging and market to Phoenix and Southern California. The TAB felt it is better to control the narrative specifically with a stewardship message, albeit a softer one, in markets that are known to visit in summer than to not market at all, since the Chamber's BID campaign is not expected to have a stewardship message.

Regarding the in-market portion of the campaign, the TAB voted in favor of the stronger educational message.

Staff Recommendations

Staff supports the TAB recommendation to fund the full summer campaign as presented by DVA, including Phoenix and Southern California.

Staff supports the TAB recommendation to fund Concept 2 ("In the Moment") as presented by DVA.

Staff does not support the TAB recommendation to soften the stewardship message and recommends keeping the message as originally conceived by DVA.

Staff and DVA agree that the summer campaign and media plan strike an appropriate balance between welcoming visitors to the destination and delivering a stewardship message that sets expectations for visitor behavior. Staff/DVA recommendations consider and incorporate feedback from residents and businesses with the intention to include diverse and occasionally opposing interests to the greatest degree possible.

Alternative(s): Direction from Council.

I move to: For discussion and direction only.

City of Sedona

Branding & Marketing Planning Research Report

February 2024

DVA ADVERTISING & PUBLIC RELATIONS

Introduction

A key component of the City of Sedona taking on the Destination Marketing/Management Organization role for Sedona was ensuring that the brand, planning, and creative are all data-driven and reflective of the wants, needs, and desires of the various stakeholders within and surrounding the City. With that in mind, the City embarked on an aggressive research effort to build a current, robust set of qualitative and quantitative data around tourism in Sedona. This report summarizes those efforts, outlines consistent themes, and provides recommendations on how those findings could influence the City's tourism brand, marketing efforts, and creative campaigns going forward.

Summary of Research Efforts

Resident Sentiment Survey

- December 2023 postcard mailing to every household in Sedona city limits, with QR code and URL link to an online survey
- Additional open link survey made available via social media and in utility bills
- A total of 631 responses were received from the postcard mailing, and another 212 from the open link – a strong response rate

Community Listening Session

- January 22, 2024 session in which community members were invited to participate in a work session to share their views on tourism
- There were approximately 40 participants in the session

Councilmember Interviews

- November and December 2023 one-on-one video interviews with each Council member and the Mayor

Lodging Council Listening Session

- December 12, 2023 session with the Sedona Lodging Council

Tourism Advisory Board Listening Session

- December 6, 2023 listening session with the Sedona Tourism Advisory Board

continued…

Visitor Intercept Survey

- December 2023 and January 2024 in-person intercept survey with visitors in Sedona, which happened to coincide with significant traffic due to the holiday timeframe and road construction in Uptown
- 582 visitors completed the survey, providing strong and statistically valid data

Chamber Interview

- January 2024 video interview with Chamber Director Michelle Conway-Kostecki

Visitor and Spend Analysis

- Utilizing visitation and spend data from Symphony and Datafy, we were able to look at top visitor origination markets by season over the last four years and also top spending by origination market over the last year

Awareness and Perception Survey

- December 2023 and January 2024 survey of 2,000 travelers in the 10 visitor origination markets with highest visitation to Sedona over the last four years
- Markets included: *Chicago, Dallas, Las Vegas, Los Angeles, Minneapolis, New York, Phoenix, San Diego, San Francisco, Seattle*
- Awareness (unaided and aided) and perception (impressions of Sedona) were measured across markets
- Sedona's awareness and attributes were also measured against six defined competitive markets: *Jackson, WY; Moab, UT; Park City, UT; Santa Fe, NM; St. George, UT; Telluride, CO*

Key Takeaways From Each Research Effort

Resident Sentiment Survey

- Tourism is not viewed favorably among Sedona residents. **56%** of respondents oppose promoting visitation to the area, while **73%** feel the town is overcrowded due to visitors.
- **Focusing on shoulder seasons does not increase support**. Most people said it would not impact their view on visitor promotion.
- However, people under the age of 65, as well as those who are employed, are **significantly more likely** to be supportive of tourism promotion and have a greater appreciation for the benefits of tourism.
- And, not surprising that those who work in tourism are **far more supportive** of promoting Sedona as a destination. They are also **more in favor** of shifting the focus to shoulder seasons.
- The biggest issues are closely related – crowding/congestion and getting around town. **95%** of residents rely on their personal vehicle for transportation, and two thirds say they **"frequently"** or **"always"** have trouble getting around Sedona.
- Vacation rentals have little support among residents. Nearly **80%** say they negatively impact neighborhoods with noise and parking issues, and **three-quarters** say they are hurting the housing supply for local residents. **Nearly two-thirds** state that short-term rentals have a "mostly negative" impact on the community.
- Most respondents are not dependent on or involved with tourism. However, **about half** are very familiar with tourism businesses in Sedona.
- **73%** agree that visitors are beneficial to the local economy and **57%** say that taxes paid by visitors are beneficial for the City and ultimately provide important amenities. **Half** believe shopping and dining options in Sedona are better thanks to visitors.
- **Two thirds** of respondents say the quality of life in Sedona is declining, while just **12%** think it is getting better.
- **Nearly 80%** of respondents said they were visitors before they moved to Sedona.

continued...

Community Listening Session

- **Recommendations drawn from residents**
  - Environmentally responsible tourism marketing
  - Traffic management
  - Balancing seasonal visitation cycle
  - Addressing housing for workforce
  - Resident involvement and education
  - Trailhead management
  - Collaboration across jurisdictions
  - Strong and consistent messaging
- **Opportunities:**
  - A strong, consistent, and responsible marketing message
  - Better communication across jurisdictions
  - STR management
  - Consideration of trailhead reservation systems
  - Shuttles/ride-shares
  - Resident involvement

continued...

Councilmember Interviews

- We understand we live in a special place that people want to visit
- We need to find a balance between resident quality of life and business prosperity
- We need more communication with residents
- Data is a key component in driving future decisions and strategies
- Traffic is clearly the biggest challenge and will take a lot of work from a lot of different angles to see improvement
- We need more education for all visitors, and targeting to those visitors who will respect our residents and the natural surroundings
- Arts, culture, and family-focused amenities are less emphasized than they could be
- We need better coordination between the City's tourism efforts and the Chamber, Lodging Council, and other Verde Valley entities

continued...

Tourism Advisory Board Listening Session

- Attract visitors we want (who respect the land and spend money) and discourage those we don't
- Promote summer and winter
- Reintroduce the things that have been lost or gotten buried: wellness, arts, culture
- Find the balance between the resident and business needs/desires - reduce the resident unhappiness and complaining
- Need better data and decisions based on that data
- Four elements needed in a balanced visitor economy: quality of life for residents, protect the environment, positive visitor experience, and business prosperity
- We need a unifying brand for the destination that resonates with residents, stakeholders, and visitors
- Sedona is a quirky, special, and unique place

continued...

Lodging Council Listening Session

- Sustainability message and management is important
- Make sure people know we welcome them
- Utilize traditional lodging properties to assist more in conveying the sustainability messaging to visitors
- Strategically market to our markets, including within the state
- We're a regional economy, not just Sedona, but the whole Verde Valley
- They'd like to see the City, Chamber, and Lodging Council collaborating
- Daytrippers contribute to a balanced economy and become a source for future overnight visitors
- They'd like to see a fresh approach to marketing Sedona

Chamber Interview

- The Chamber would like to see a balanced tourism economy that is understood and defined
- They'd like the community to rally and speak with one voice
- Preservation of our land is important to Chamber members
- Preservation of community character is key to the Chamber
- Livelihood of residents, workers, businesses, economic outlook are all goals of the Chamber
- With the City managing the larger tourism work, they appreciate the ability for the chamber to focus on the business community and needs
- They suggest that we all need to listen and actually hear the business community when it speaks
- The City should be leading the sustainable tourism effort

continued...

Visitor Intercept Survey

- Visitors have strong positive feelings toward Sedona. They awarded the city a **Net Promoter Score (NPS) of 90**, which is extremely high for a leisure travel destination. The positive NPS was reinforced by a **satisfaction rating of 4.8** on a scale of 1-to-5.
- All aspects of Sedona are highly rated. Trails, small town charm, friendliness, and customer service topped the list. **Getting around town was the lowest ranked attribute but still garnered a favorable 4.5 rating** on a scale of 1-to-5.
- **Nearly 80% of visitors during the holiday period were from out of state**. California was the largest contributor, with large numbers from Los Angeles, San Diego, and San Francisco in town. Predictably, most Arizona visitors (69%) were from the Phoenix area. International visitors accounted for **10% of respondents**. Half of those were Canadian.
- While most visitors interviewed were on their first trip to Sedona, those who have been before come back often. On average, repeat visitors were on their **seventh trip** to the area. Overnight visitors **averaged just over 4 nights** staying in Sedona.
- Enjoying the **scenery** was the top activity, followed closely by **hiking, dining, and shopping**. Nearly three-quarters of visitors said they went hiking while in town.
- **Tourism spending is significant in Sedona**. On average, visitors spend over $100 per day on dining and nearly $50 on shopping. Tours and excursions are also popular. Visitors spend nearly $40 per person per day on guided activities in and around Sedona. **The average nightly lodging rate was reported at $275 with nearly half of overnight guests spending more than $300 nightly.**

continued…

Awareness & Perception Survey

- Sedona has **extremely high unaided awareness** across potential target markets, particularly high (67%) in Phoenix. Additionally **60% of Phoenicians** surveyed intend to visit Sedona in the next 12 months. Las Vegas (26.5%) and Los Angeles (22%) are the next two highest intent markets for visitation in the next 12 months. Every market surveyed has high intent to visit Sedona at some point. Not surprisingly, the most desirable month for intended visitation is **April** (at 29.5%). **December** was the lowest month at 7.7%.
- Sedona was the **third highest rated Arizona destination** in terms of desire to visit (with 28% of respondents listing it) behind the Grand Canyon (42.5%) and Phoenix (40%). It was ahead of Tucson (19%), Flagstaff (14%), and Scottsdale (12.5%).
- Sedona was the **most familiar and most visited** of the defined competitive markets (*Jackson, WY; Moab, UT; Park City, UT; Santa Fe, NM; St. George, UT; Telluride, CO)*, with Santa Fe capturing second place. Sedona also garnered the **highest level of interest** from respondents in terms of interest in visiting in the future, again with Santa Fe coming in second.
- Traveler profiles that fit personas of **“sustainability prioritizers”, “leave no trace adherents”, and “high value travelers”** – all profiles that fit the desires of the community and stakeholders – ranked above the total sample responses in terms of past visitation, familiarity, interest, and likelihood to visit again.

continued…

Awareness & Perception cont.

- The top reasons people listed for visiting Sedona were:
  - **To be surrounded by natural scenic beauty (58%)**
  - **For rest and relaxation (54.5%)**
  - **To be outdoors and experience nature (52%)**
  - **To seek adventure (44%)**
- The average planning time frame for a trip to Sedona is nearly **five months**, however of those most likely to visit in the next year, 27% said they would plan their trip **2-4 weeks** out.
- The average number of nights people said they would stay was **3.4**. Most would come with a significant other or friend(s), but 45% of those who are highly likely to visit in the next 12 months said they would bring children.
- **12% of respondents said they would ONLY stay in a vacation rental.**
- **83%** of respondents said they would go to restaurants, well ahead of seeing the red rocks at **63%**.
- Interestingly, **traffic and crowds were at the bottom of the list of reasons why respondents would NOT visit** Sedona. Top reasons were not enough time, lack of awareness, and cost.

continued…

Visitation & Spend

Top 10 overall (year-round) visitation markets, in order, compiled from last four years of data:

1.	Phoenix	28.1%
2.	Los Angeles	8.36%
3.	New York	3.9%
4.	Chicago	3.23%
5.	Tucson	3.11%
6.	San Diego	2.21%
7.	Dallas	2.19% (top summer market)
8.	Minneapolis	2.01% (top winter market)
9.	Las Vegas	1.12%
10.	Houston	1.08%

Top 10 spend markets for Full Year 2023, as a percentage of spending data from TransUnion/Commerce signals. Spending categories include Food & Beverage, Retail, Lodging (in-market spend only), Transportation and 'Other':

1.	Phoenix	16.1%
2.	Los Angeles	8.4%
3.	Seattle	3.1%
4.	Chicago	2.8%
5.	San Francisco	2.7%
6.	New York	2.4%
7.	Dallas	2.3%
8.	Tucson	2.2%
9.	San Diego	2.1%
10.	Denver	2.1%

continued…

Visitation & Spend

Top 10 winter markets, in order, compiled from last four years of data:

1.	Phoenix	28%
2.	Los Angeles	8.98%
3.	New York	3.75%
4.	Tucson	3.36%
5.	Chicago	3.04%
6.	Minneapolis	2.88%
7.	San Diego	2.58%
8.	San Francisco	1.88%
9.	Las Vegas	1.09%
10.	Seattle	1.03%

Top 10 summer markets, in order, compiled from last four years of data:

1.	Phoenix	33.7%
2.	Los Angeles	8.78%
3.	New York	4.1%
4.	Tucson	3.53%
5.	Chicago	2.32%
6.	Dallas	2.21%
7.	Las Vegas	1.61%
8.	San Diego	1.41%
9.	San Francisco	1.28%
10.	Philadelphia	.92%

Overarching Themes

- Residents, councilmembers, stakeholders, and current and potential visitors all agree that Sedona is an incredibly special place. Scenic beauty, outdoor recreation, dining, shopping options, arts, culture, and wellness are all alluring elements of this unique destination. It’s what drew people to live here and what continues to draw people from all over the world to visit.
- Residents, councilmembers, and stakeholders all agree that while tourism provides a great economic benefit, over-tourism is a real threat, particularly during key times of the year.
- All parties would like to see additional education, better communication, and concerted efforts to target and time visitation as a means to provide more consistent year-round economic benefit, with fewer negative impacts.
- Current and potential visitors have high awareness and an extremely positive perception of Sedona. When they visit, they often stay more than a day and spend highly on lodging, restaurants, and shopping. Sedona is clearly on the list of places a lot of people want to visit. There is no indication that negative resident sentiment, crowded trails, or traffic are impacting their positive view of Sedona or their intent to visit.
- It will clearly take more than just a new marketing approach to make visible changes, but there is an energy behind doing the work necessary to keep resident quality of life as a top priority, while also supporting local business, and welcoming visitors to this exceptional corner of the world.

Recommended Actions

The Brand

- Emphasize the idea of Sedona being “yours to protect” – a concept that applies to residents, stakeholders, and visitors
- Sustainability underscores everything we do – from protecting the fragile environment to ensuring economic benefit is spread as evenly as possible for the long term, year-round and across the commercial sector
- Resident quality of life is a key element in everything we do
- Focus on how unique and special this place truly is – the surroundings, the art, the culture, the energy, the dining, and the shops – worthy of our love, protection, and sharing with visitors and future generations

Marketing Plan

- Focus solely on stewardship-themed brand and marketing efforts across all markets and audiences, including both in-market and externally
- Ongoing communication with the community is key – updates on City marketing initiatives, and ongoing community feedback opportunities

continued…

Marketing Plan – cont.

- Key summer and winter visitation flight markets will be targeted with sustainability-focused messaging, and only during summer and winter booking windows
- All drive markets and within the Verde Valley will be targeted with sustainability-focused messaging year-round
- When reaching out to external markets, profiles that fit “sustainability prioritizers,” “leave no trace adherents,” and “high value travelers” will be prioritized and targeted
- In addition to traditional and digital advertising, incorporate in-market visible education to visitors (and residents) – road and trail signage, in-town posters, information from trail stewards, etc.
- Trail management (which also helps with traffic management)
  - Aggressively market shuttles, ride sharing, cycling, and walking
  - Strategically, where appropriate, consider closing roadside parking around trailheads
  - Work with the Forest Service to review the option to phase in a trailhead reservation system on the most heavily used systems

THANK YOU

SEDONA RESIDENT SENTIMENT SURVEY – FALL 2023

TABLE OF CONTENTS

INTRODUCTION

The purpose of this research is to gather community feedback from residents on tourism and its impacts in Sedona. City staff is interested in how visitors affect:

- Traffic and congestion
- Infrastructure in Sedona
- The local economy
- Housing affordability and supply
- Use of trails and other amenities by locals
- Overall quality of life in Sedona

RESEARCH METHODOLOGY

THE STASTICIALLY VALID SURVEY

- Postcards were mailed to every resident household in the City's database which included **6,068 addresses**.
- Residents were provided a QR code and a URL link to complete the survey online. A specific passcode was given to each recipient to ensure only one survey was completed per household.

631

Invitation surveys completed

+/- 4.5% Margin of Error

RESEARCH METHODOLOGY

THE OPEN LINK SURVEY

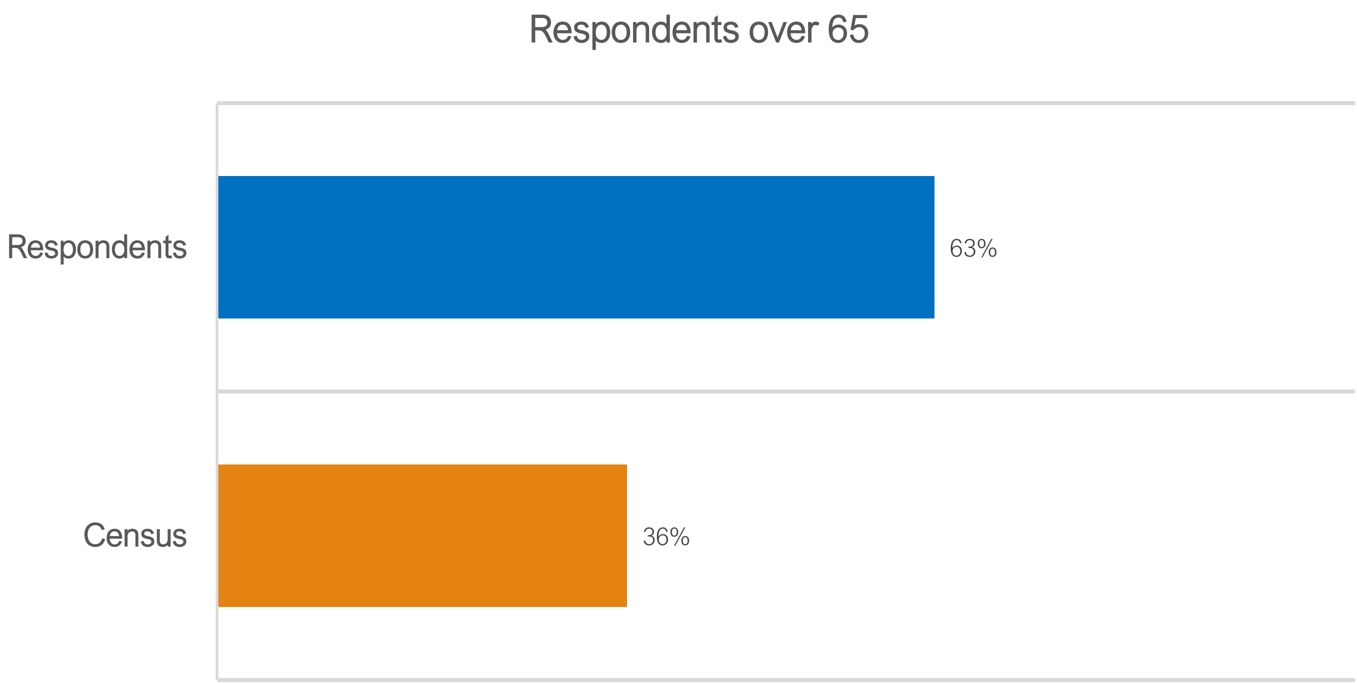
- After the initial invite survey mailing, the online survey was made available to all Sedona area residents. This included those who live outside the city limits as the survey was not passcode protected, allowing any interested party to participate.

212
Open Link Surveys Completed

843	The total number of complete Invite and Open Link surveys collected

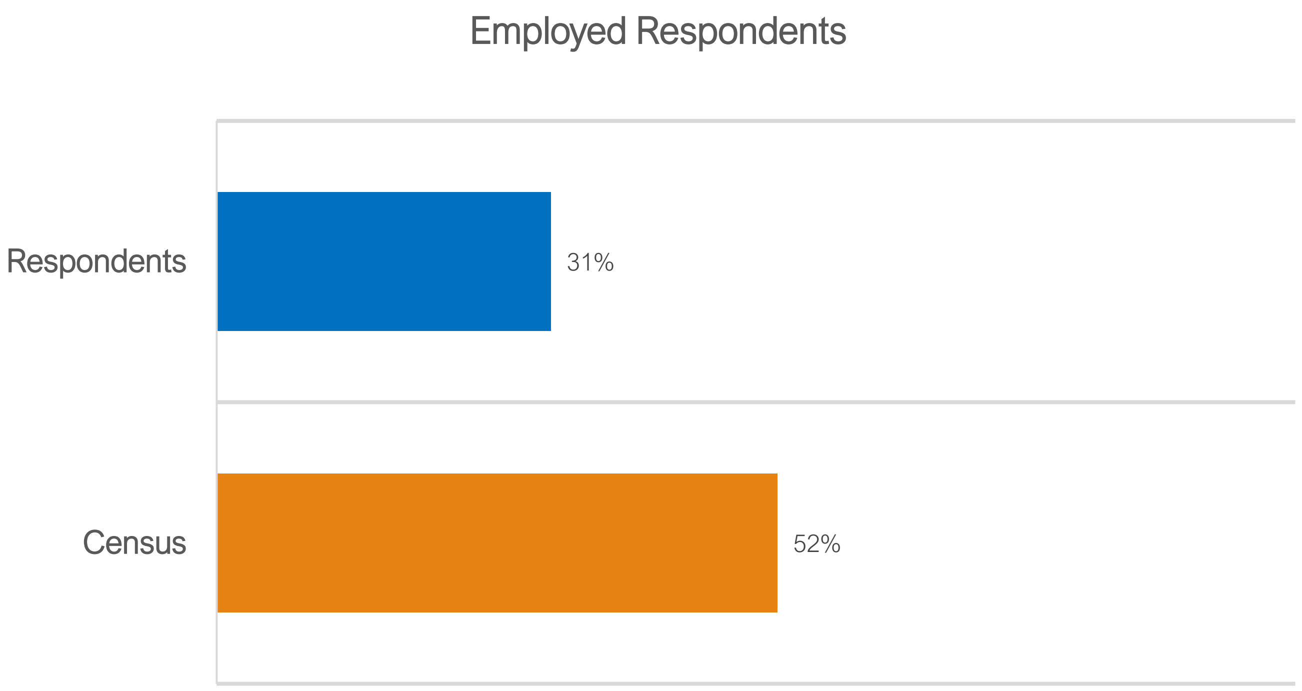
RESPONDENT AGE VS. CENSUS

Invitation Survey respondents tracked somewhat older than the Census demographic data for Sedona.



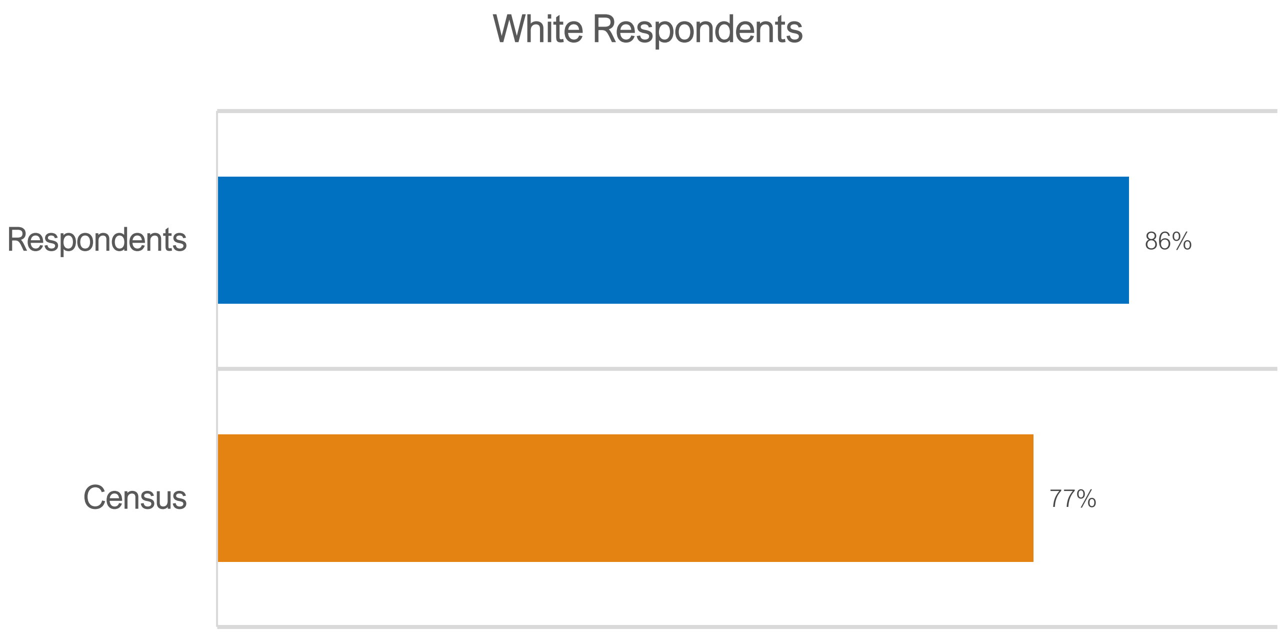
EMPLOYMENT VS. CENSUS DATA

Consistent with their higher age, more respondents are retired vs. the general population.



ETHNICITY VS. CENSUS DATA

Survey respondents were slightly less diverse overall than the general population of Sedona according to Census data.



KEY FINDINGS

KEY FINDINGS

Tourism is not popular with Sedona residents. 56% of respondents oppose promoting visitation to the area while 73% feel the town is overcrowded due to visitors. 70% say that new development related to tourism is damaging the character of the community.

Shifting the focus to shoulder seasons would not increase support. Most people said it would not impact their view on visitor promotion and 27% would be less supportive. Many residents clearly see the shoulder seasons as their respite from the congestion of peak periods.

The biggest issues are closely related – crowding/congestion and getting around town. 95% of residents rely on their personal vehicle for transportation and two thirds say they "frequently" or "always" have trouble getting around Sedona. The winter shoulder season is the least stressful for driving. Clearly visitors receive the blame for traffic.

KEY FINDINGS

Vacation rentals have little support among residents. Nearly 80% say they negatively impact neighborhoods with noise and parking issues and three-quarters say they are hurting the housing supply for local residents. Nearly two-thirds state that short-term rentals have a “mostly negative” impact on the community. Note that over 90% have not used their home as a vacation rental.

Concerns about housing are mixed. Housing supply and prices were cited by just 27% of invite respondents as an issue of concern in Sedona. When asked directly, 50% say they are very or extremely concerned about availability but just 43% cite housing prices as a big issue. Note that over 90% own their homes so likely do not feel the pain of rising prices and tight supply.

Most respondents are not dependent on or involved with tourism. However, about half are very familiar with tourism businesses in Sedona. They are aware that promotion is now handled by the City but just 13% say the move increases their confidence in the marketing efforts. And less than 30% support tourism promotion at all. Interestingly, nearly 80% came to Sedona as a visitor before moving to town.

KEY FINDINGS

Demographically, respondents are affluent, older, retired and highly educated. 57% are retired, nearly 90% are over 55 and 60% have net incomes over $100,000. 82% have a college degree or higher compared to the national average of 38%. As noted above, 91% own their homes in Sedona.

On a positive note, 73% agree that visitors are beneficial to the local economy and 57% say that taxes paid by visitors are beneficial for the City and ultimately provide important amenities. Half believe shopping and dining options in Sedona are better thanks to visitors. But 53% say the negative impacts of visitors outweigh the positives.

-2

Two thirds of invite respondents say the quality of life in Sedona is declining while just 12% think it is getting better. The Net Promoter Score (NPS) among invite respondents is -2% which is comparatively very low. Clearly there are high levels of frustration with a variety of visitor impacts from congestion to noise and a loss of community character. And, while residents believe visitors are positive economically, they do not see that as enough to offset the negatives.

KEY FINDINGS

Retirees were predictably more negative on the quality life in Sedona than those who are working. The same was true of older (65+) residents vs. younger people in town. However, frustration with crowding, traffic and the overall impacts of visitors was strong across all demographic cohorts.

Those respondents who are employed are generally less concerned than retirees with the impacts of vacation rentals in town but also think that housing affordability and cost are bigger problems than those who are retired. Workers are also more likely to support more festivals and events in Sedona.

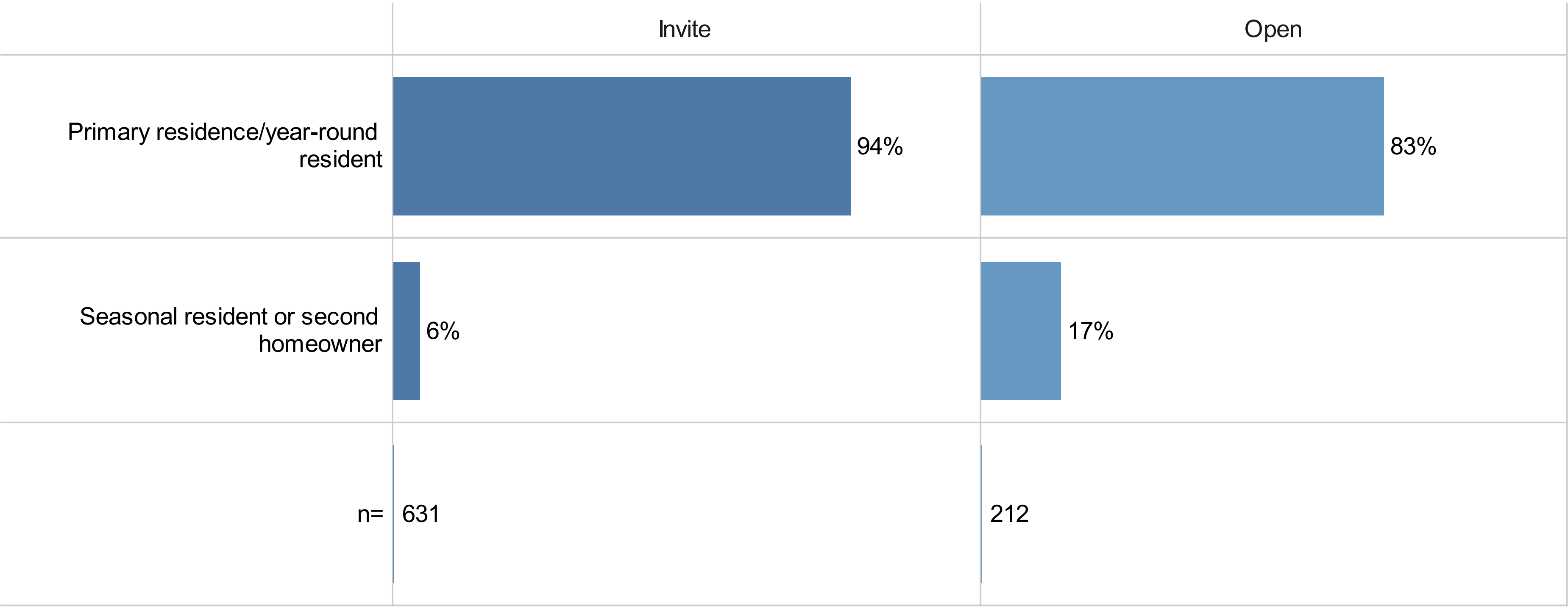
When asked about tourism promotion, about half of working residents support funding visitor marketing vs. just 23% of retirees. Interestingly, there was very little difference in the lack of support for shifting promotion to shoulder seasons. It seems everyone in Sedona likely views the slower periods as a break from the busy peak seasons.

LIVING IN SEDONA

SEDONA RESIDENCY

The mailing list targeted all mailing addresses within the city limits which resulted in 94% of respondents to the invite survey being primary residents. The open-link respondents included a higher percentage of seasonal residents.

What best describes your residence in the City of Sedona?

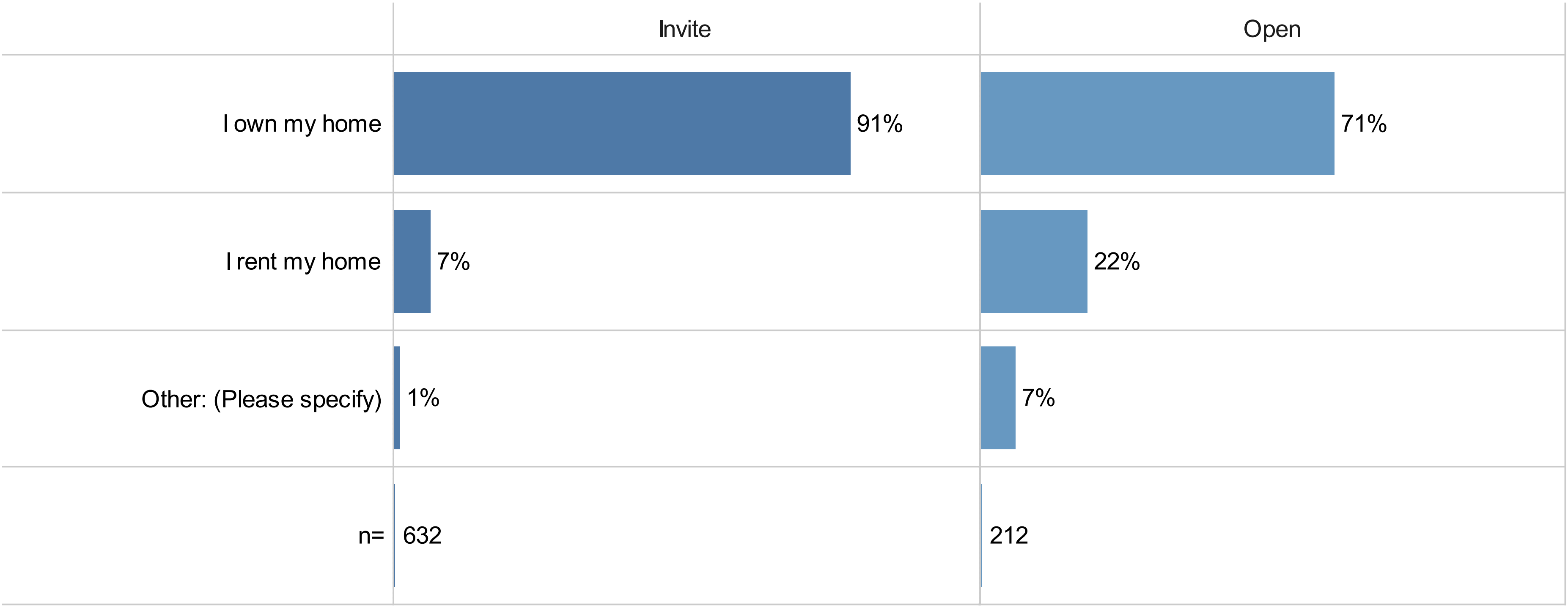


Source: RRC

HOME OWNERSHIP

An overwhelming majority of respondents own their homes. Open-link respondents were more likely to be renters than the invite sample but 71% of open-link respondents own their homes.

Do you own or rent your home in the City of Sedona?

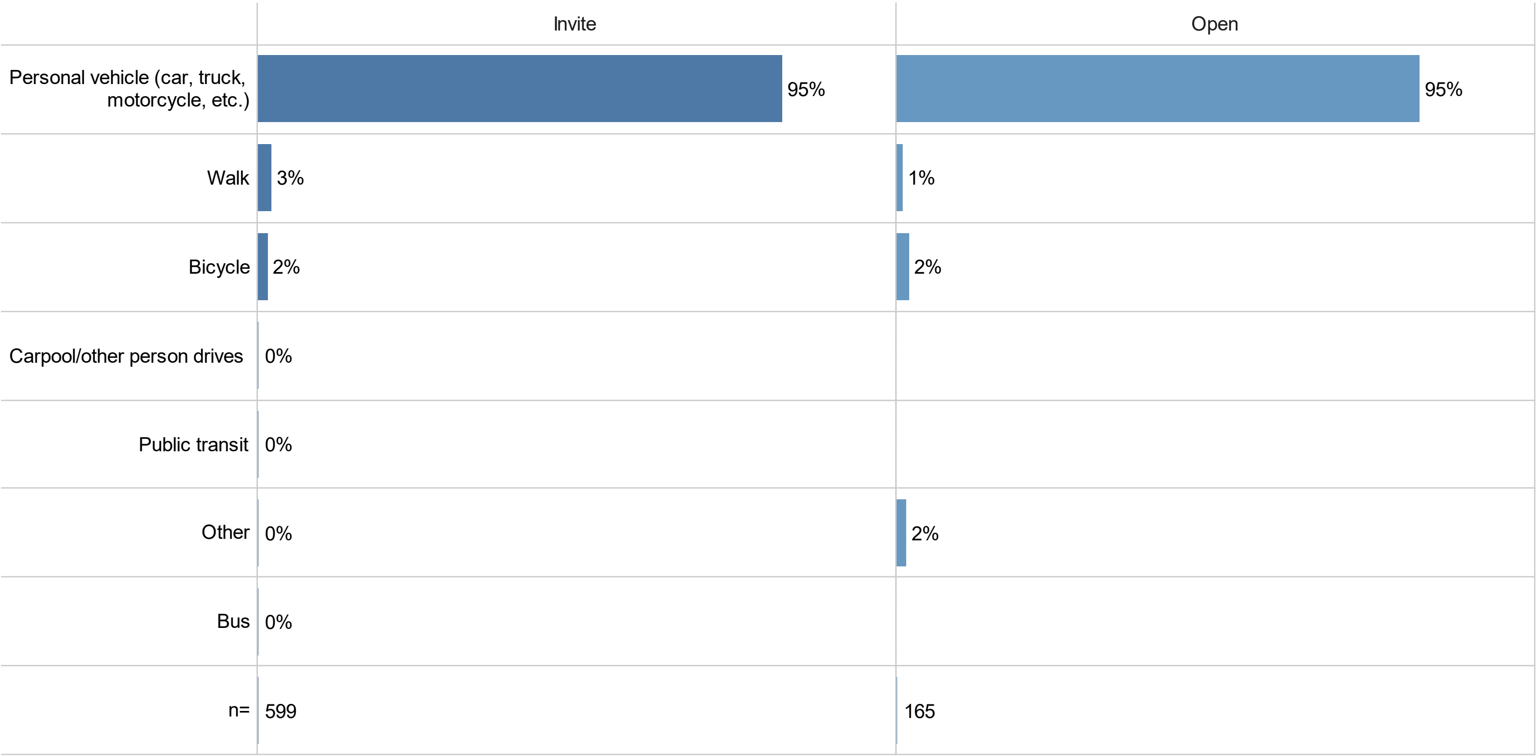


Source: RRC

TRANSPORTATION

Personal vehicles are the dominant means of getting around Sedona.

How do you typically get around the area?

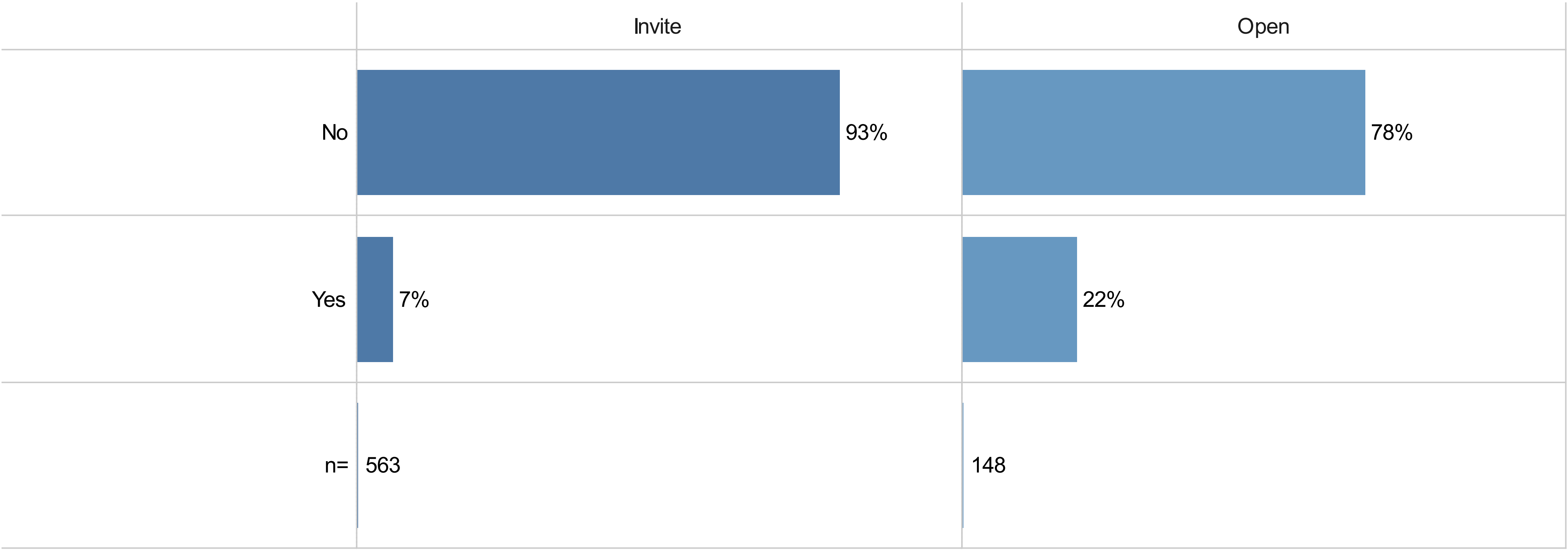


Source: RRC

RENTING HOMES BY OWNERS

The large majority in both surveys had not used their homes as short-term rentals currently or in the past.

Have you ever used this home as a short-term rental/VRBO/Airbnb?

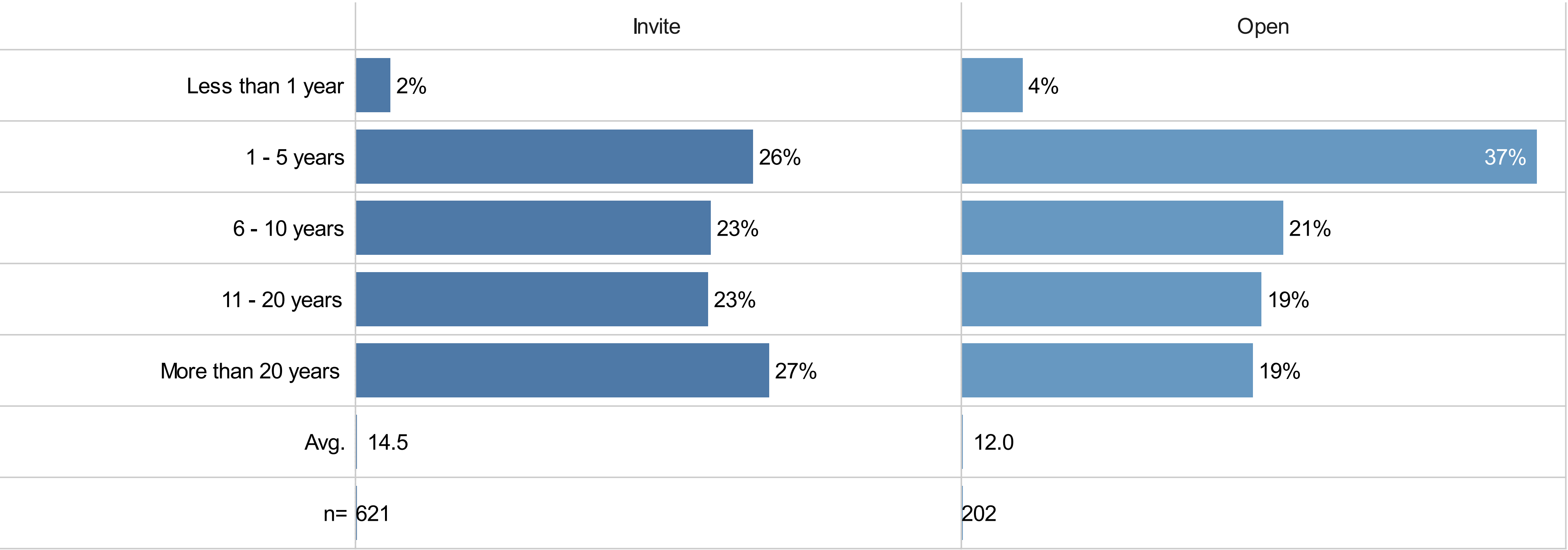


Source: RRC

LENGTH OF TIME IN SEDONA

Respondents tend to be long-term residents. Half of invite and 38% of open-link respondents have lived in the city for more than 10 years.

How long have you lived in the City of Sedona? Enter 0 if less than a year.

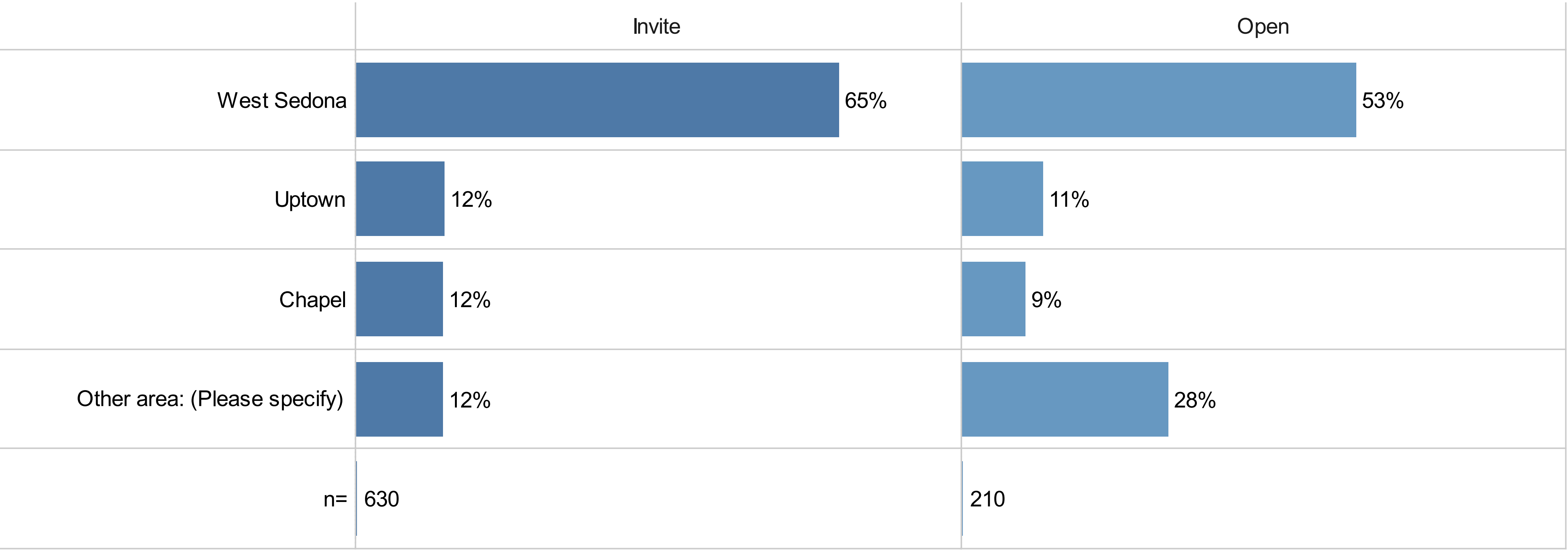


Source: RRC

AREA OF TOWN

The majority of respondents to both surveys live in West Sedona.

In which part of the City of Sedona do you live?

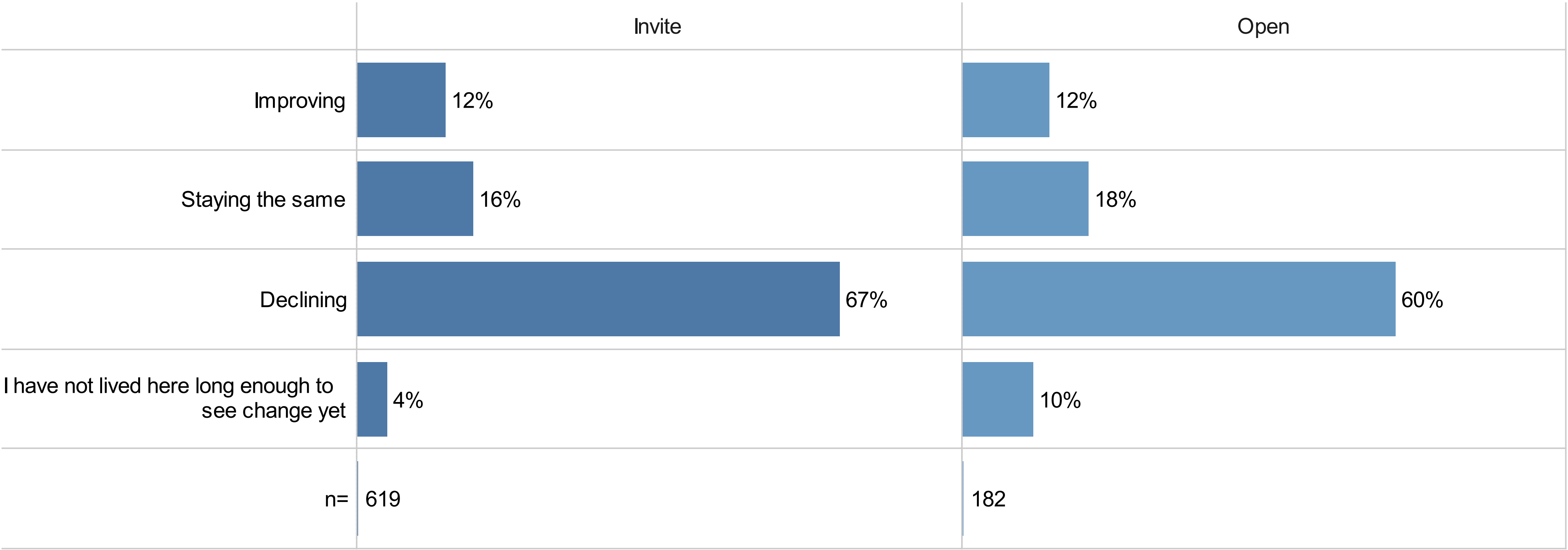


Source: RRC

QUALITY OF LIFE TRENDS

Two-thirds of invite respondents say the quality of life in the community is declining.

Would you say the overall quality of life for residents in Sedona has been:



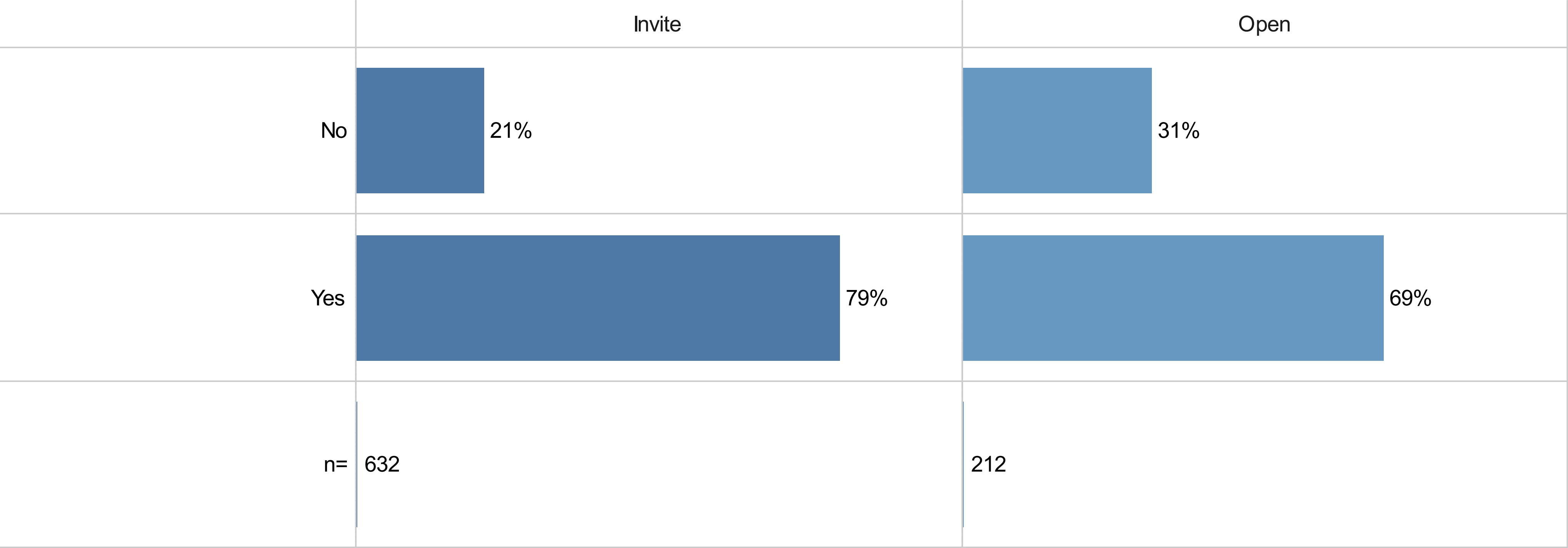
Source: RRC

TOURISM

VISITING SEDONA BEFORE MOVING

A strong majority of both surveys visited Sedona as tourists before moving to the community.

Did you come to Sedona as a visitor before deciding to move here?

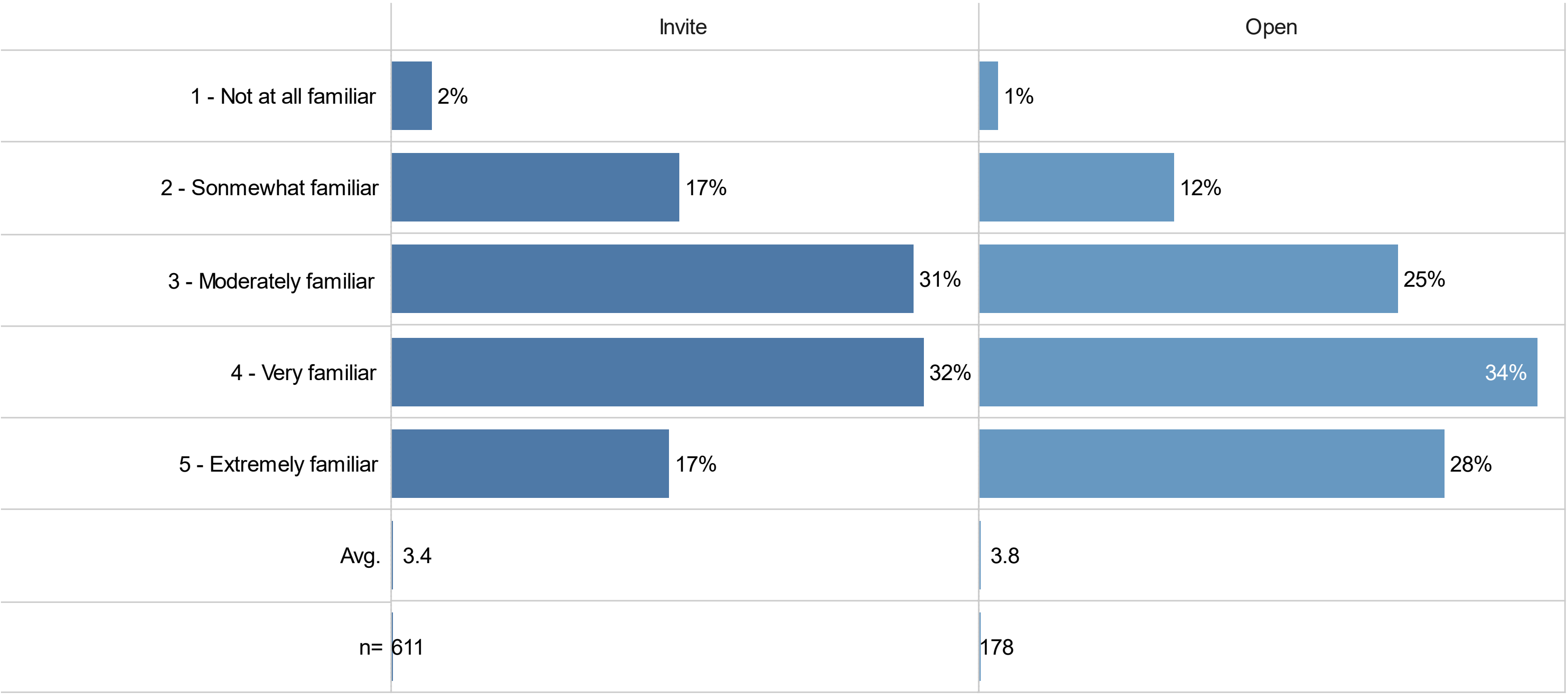


Source: RRC

KNOWLEDGE OF TOURISM BUSINESSES

Familiarity with tourism businesses in Sedona is mixed. About half of invite respondents are very or extremely familiar while a third of open-link respondents say they know the businesses well.

How familiar are you with the tourism businesses in Sedona?

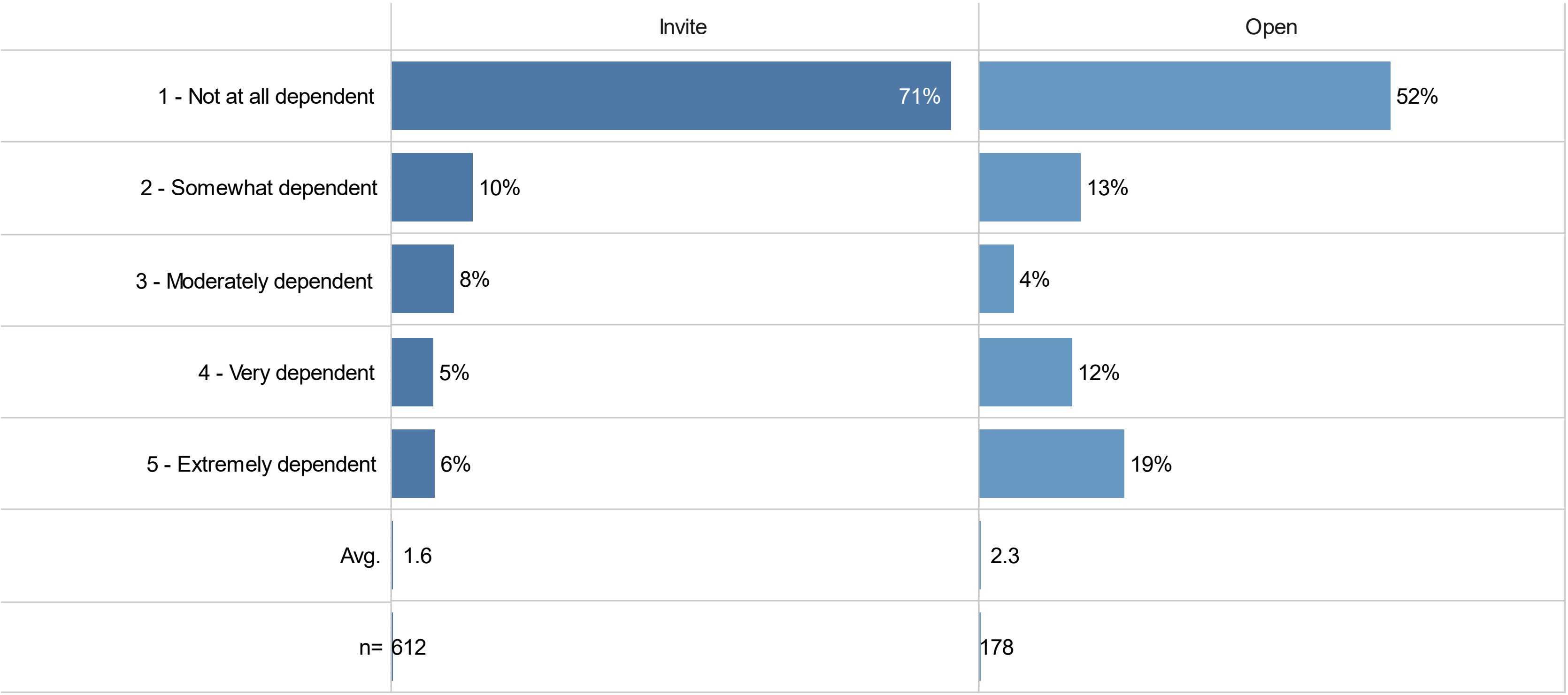


Source: RRC

RELIANCE ON TOURISM

The large majority of residents in the invite survey (71%) are not reliant on tourism for their income. Just 11% of invite respondents say they are very or extremely dependent. However, nearly a third of open link respondents rely on tourism.

To what extent do you rely on tourism in Sedona to support your livelihood?

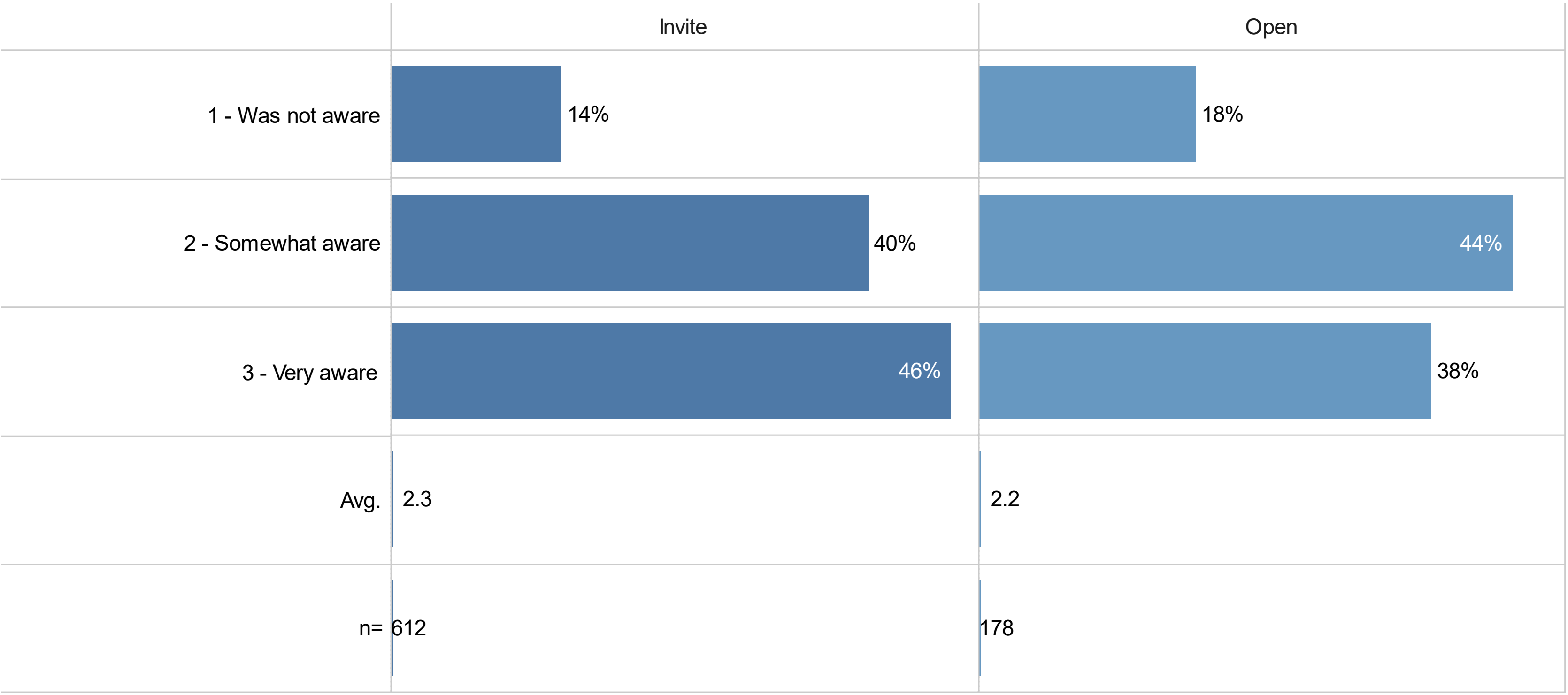


Source: RRC

CITY'S ROLE IN TOURISM

The large majority of residents are at least somewhat aware that tourism promotion efforts have shifted to the City.

How familiar are you with the transfer of tourism promotion efforts from the Chamber to the City of Sedona?

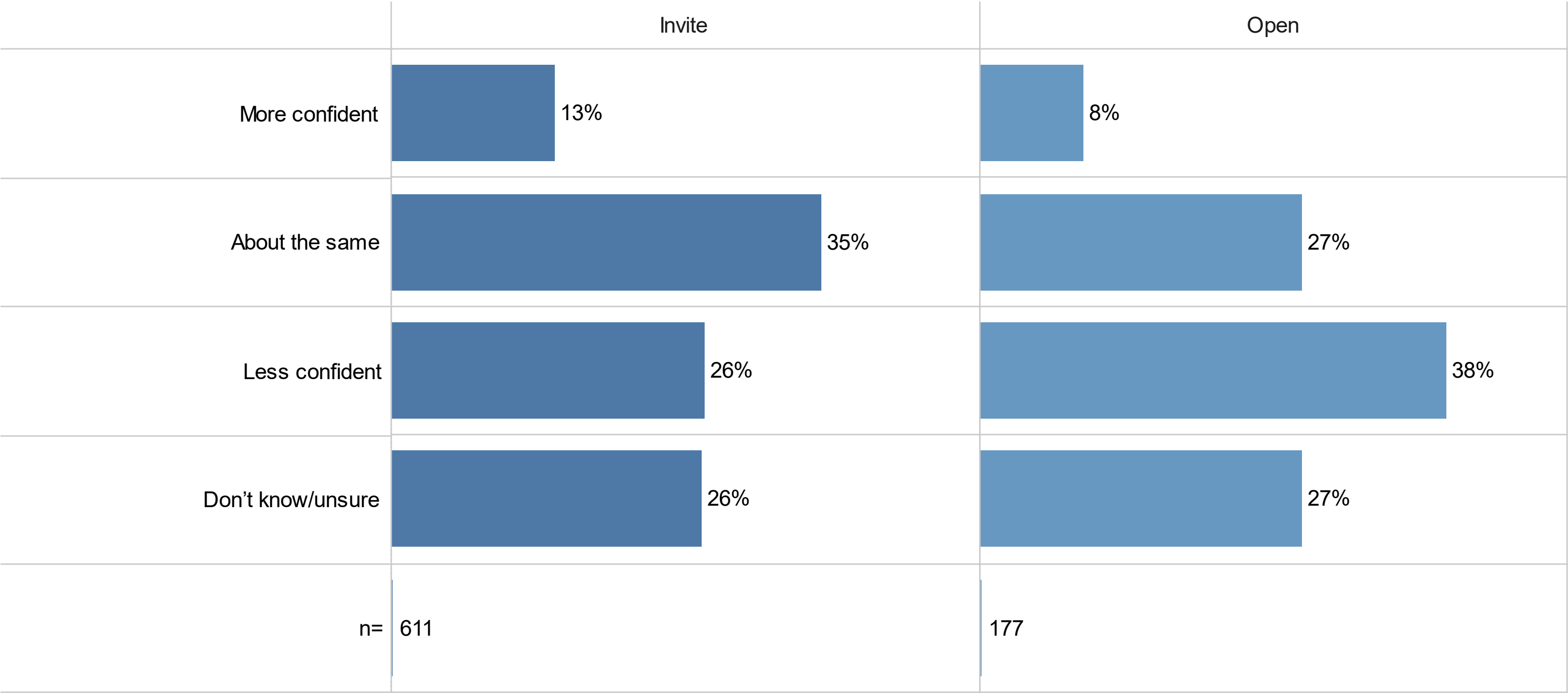


Source: RRC

CITY'S ROLE IN TOURISM

There is no clear consensus on how the City's takeover of visitor promotion impacts confidence in the marketing efforts.

What is your level of confidence in the direction of visitor promotion now that the City is responsible for marketing and managing tourism in Sedona?

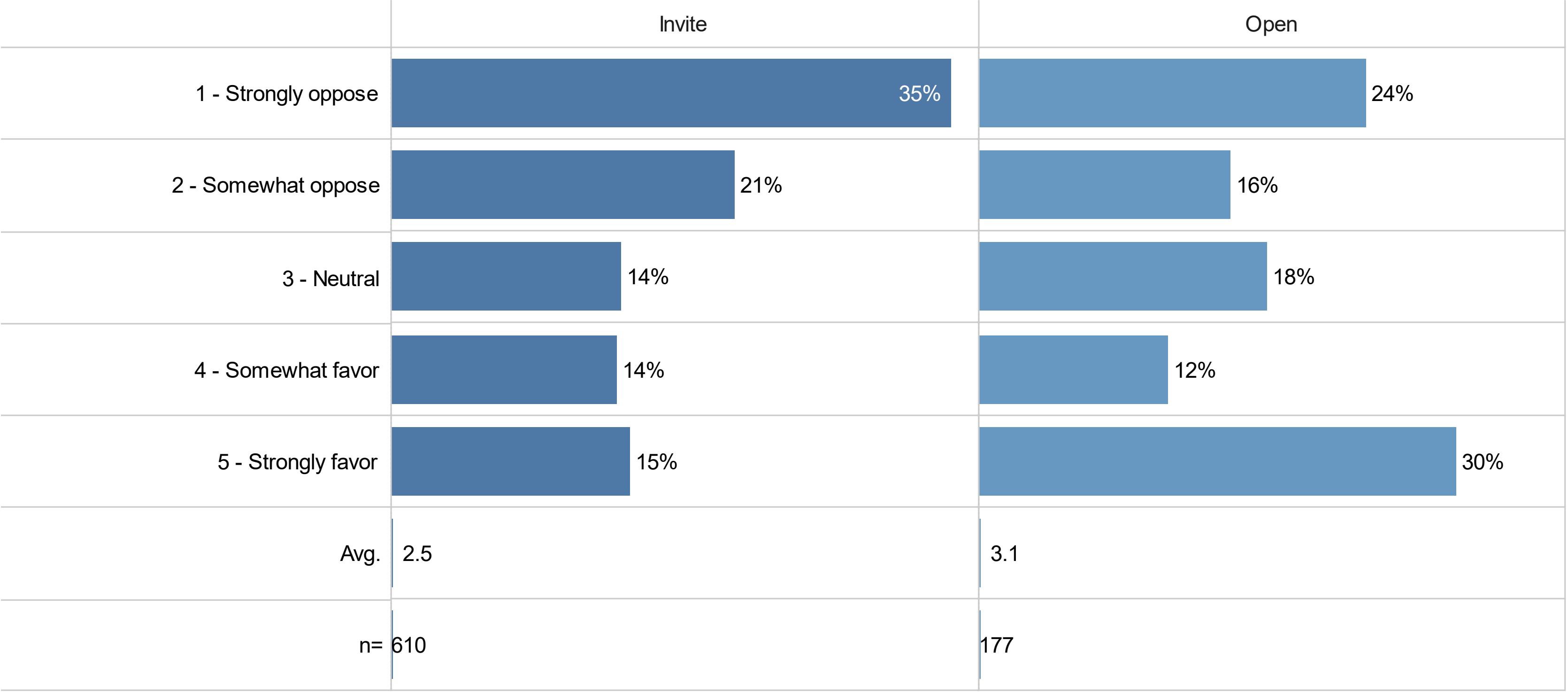


Source: RRC

SUPPORT FOR TOURISM PROMOTION

56% of residents in the invite survey oppose promoting tourism in Sedona vs. 29% who support it. Open-link respondents are split evenly on whether to promote visitation to the city.

How supportive are you of promoting Sedona to attract visitors from outside the area?

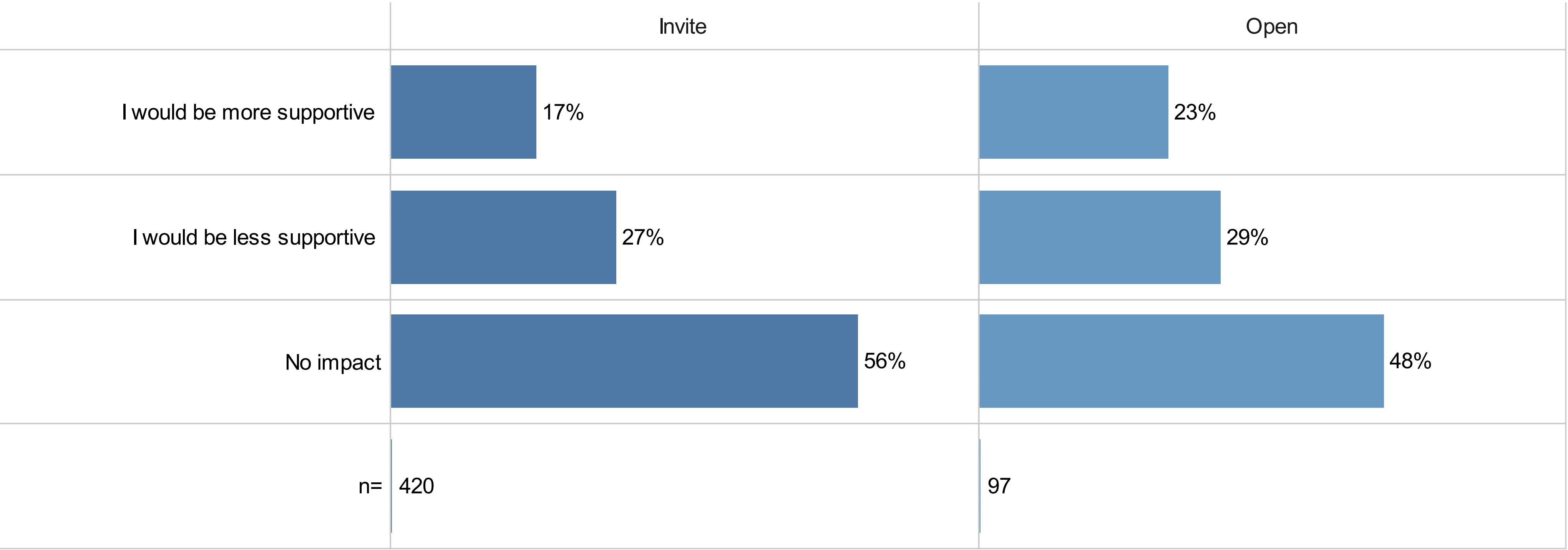


Source: RRC

SHOULDER SEASON PROMOTION

There is little support in Sedona for shifting promotional efforts to the shoulder seasons.

Would focusing promotion on the shoulder seasons (June-August & December-February) impact your opinion?

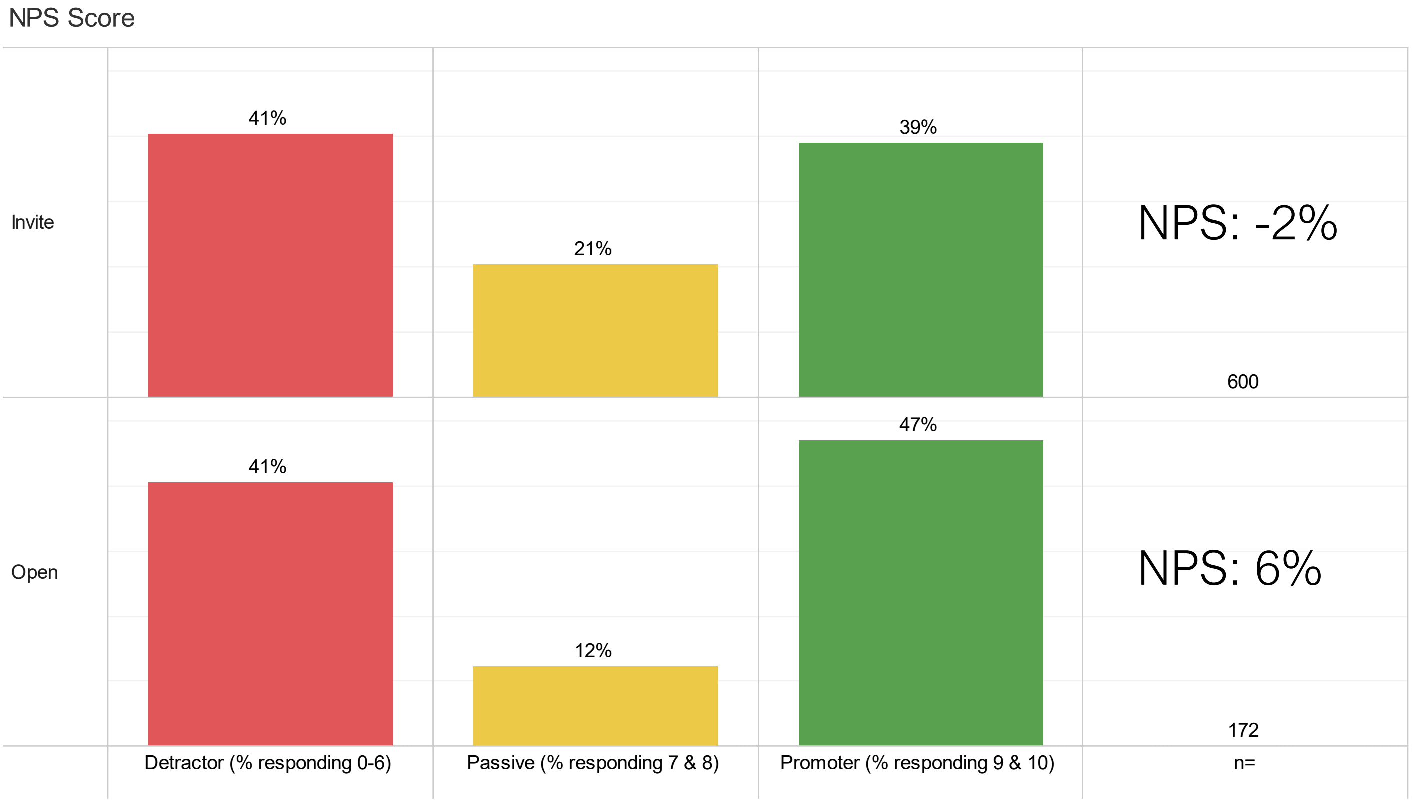


Source: RRC

RATINGS

NET PROMOTER SCORE

Resident frustration with tourism comes through strongly in measuring NPS among residents. Invite survey respondents give the destination a negative rating and open-link respondents barely eke out a positive NPS.



Source: RRC

QUALITY OF LIFE STATEMENTS

Residents believe trails are overused, Sedona is overcrowded and development is hurting community character. However, they also agree that tourists are good for local businesses and that tourism tax revenues are important to the City. They disagree that tourism benefits outweigh negative impacts and that infrastructure can handle the burden created by visitors.

How much do you agree or disagree that…?

Statement	n	Avg.	1 - Srongly disagree	2 - Disagree	3 - Neutral	4 - Agree	5 - Strongly agree
Local trails are being strained by overuse due to too many visitors.	n=758	Avg. 4.1	5%	8%	10%	24%	53%
Sedona is overcrowded because of too many visitors.	n=779	Avg. 3.9	6%	12%	9%	27%	46%
New development related to tourism is hurting Sedona's character.	n=755	Avg. 3.9	6%	11%	12%	28%	42%
Visitors benefit our small businesses and our local economy.	n=769	Avg. 3.9		6%	18%	40%	33%
Noise from OHVs and helicopters disrupts my enjoyment of Sedona.	n=768	Avg. 3.8	7%	11%	17%	21%	44%
Sedona offers a welcoming experience for people of diverse ethnic/religious backgrounds.	n=716	Avg. 3.5		9%	33%	37%	17%
Sales and lodging taxes paid by visitors are important to the City and improve services and amenities that are important to residents.	n=759	Avg. 3.5	9%	15%	20%	31%	26%
There are better shopping, dining, and cultural opportunities in Sedona because of tourism.	n=784	Avg. 3.2	15%	21%	14%	25%	24%
Visitor spending helps sustain local residents' quality of life	n=768	Avg. 3.2	15%	20%	18%	24%	23%
Most visitors behave respectfully in our community.	n=768	Avg. 3.0	13%	20%	28%	28%	11%
The overall benefits of tourism in Sedona outweigh the negative impacts	n=768	Avg. 2.7	26%	27%	15%	16%	16%
City infrastructure and visitor services can support the volume of tourism in Sedona.	n=759	Avg. 2.2	37%	31%	13%	11%	8%

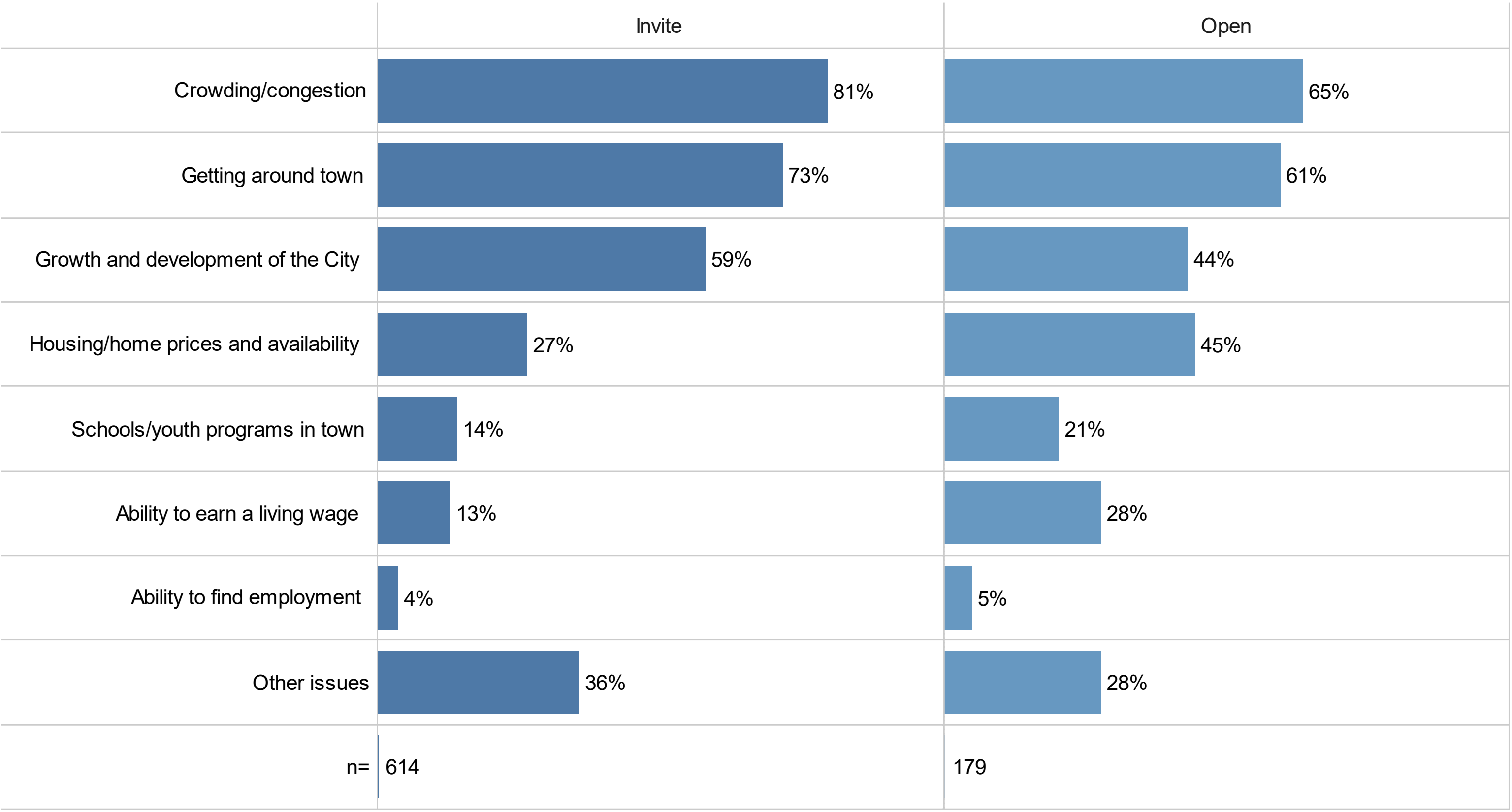
Source: RRC

KEY ISSUES

CHALLENGES IN SEDONA

The closely related challenges of crowding, getting around town and growth are the biggest impacts on residents.

What are the biggest impacts or challenges affecting you personally or professionally in Sedona (Check all that apply)

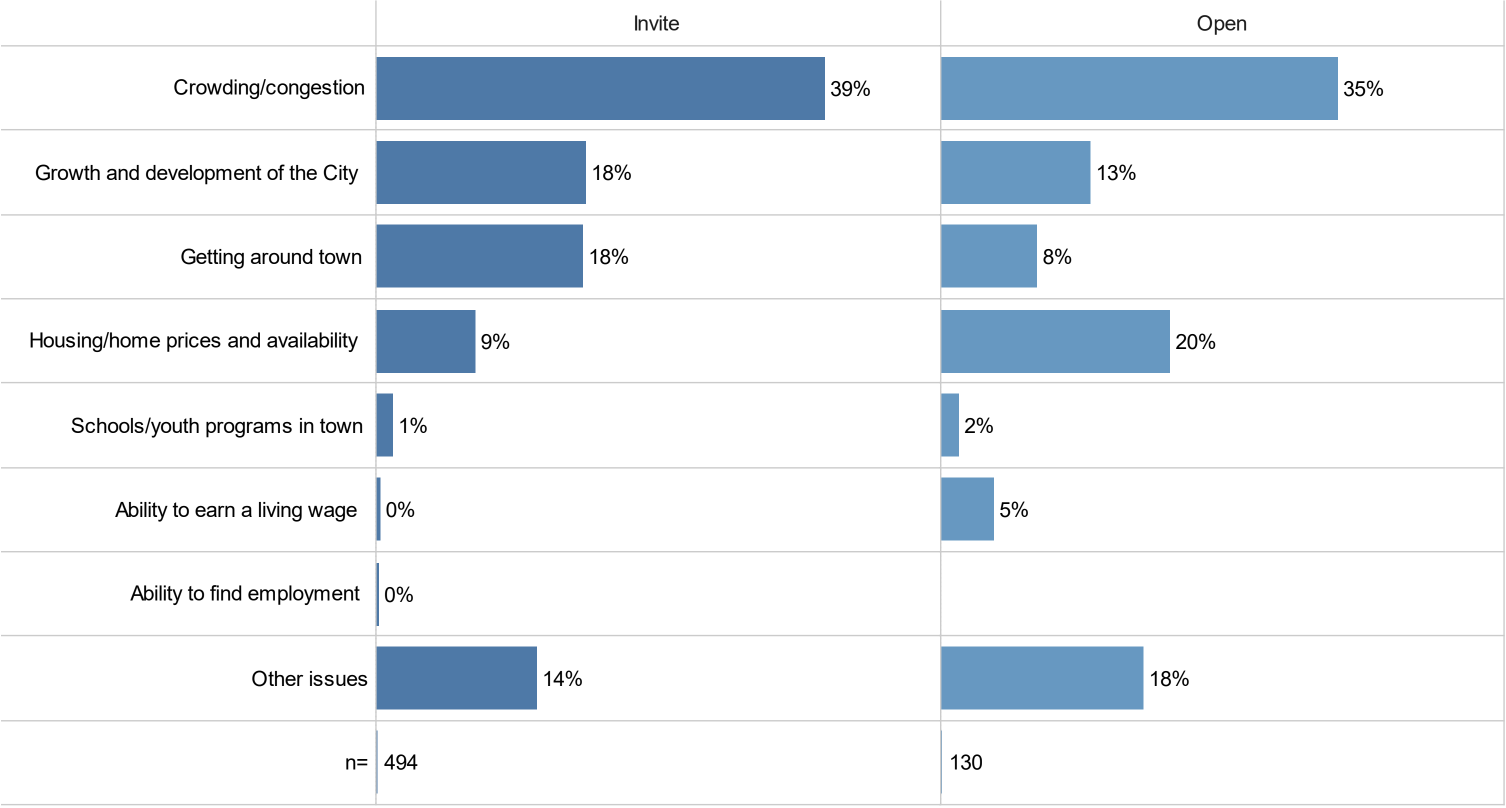


Source: RRC

BIGGEST CHALLENGE

Crowding and congestion are the biggest complaints for both invite and open-link respondents. Growth and getting around town are also near the top of the list for invite respondents. Open-link respondents rated housing concerns higher than growth or traffic.

Which issue or challenge from the previous question is the most important to address by local officials or decision-makers?

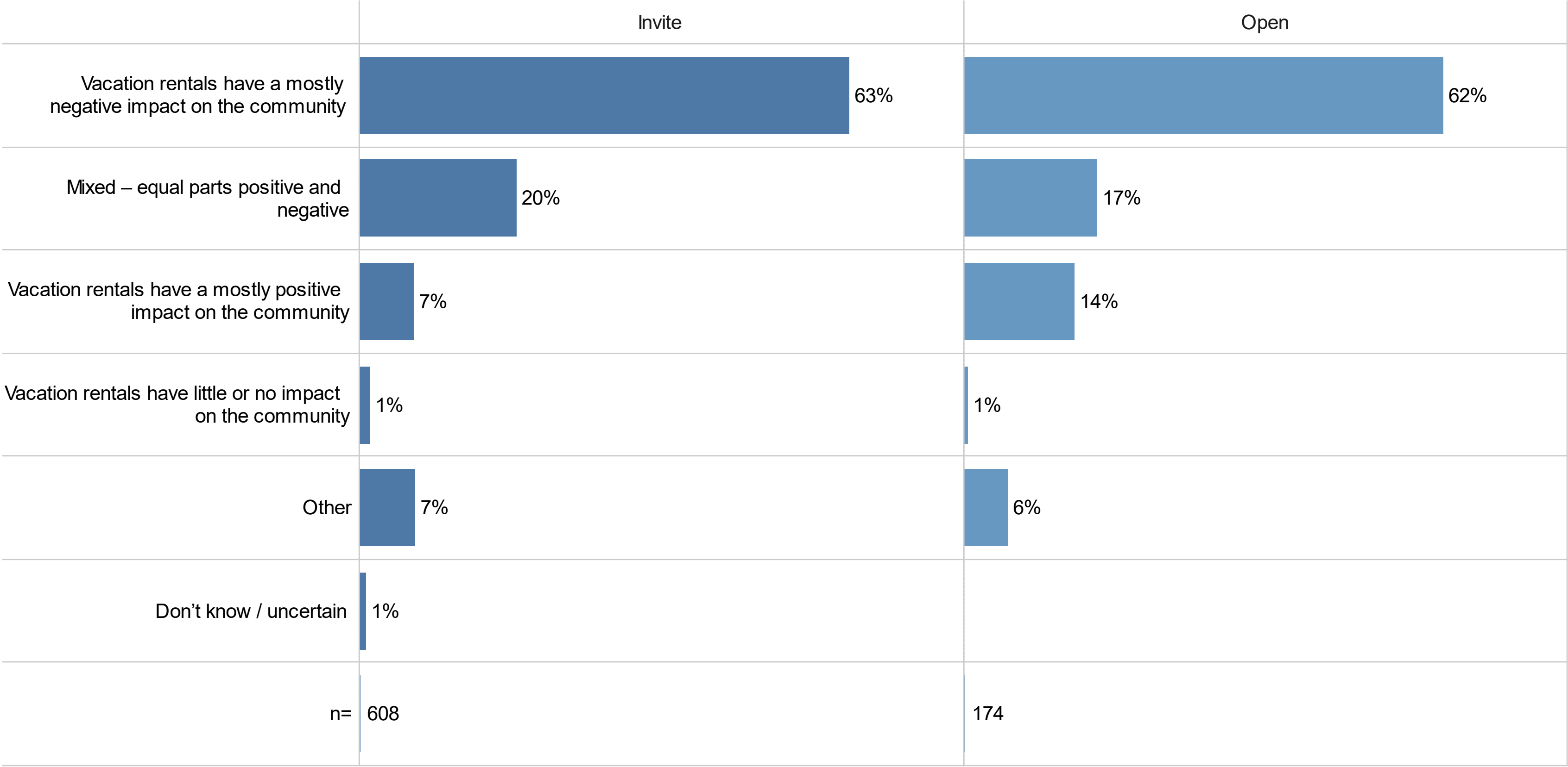


Source: RRC

VACATION RENTAL IMPACTS

Residents clearly feel that vacation rentals negatively impact Sedona.

Generally speaking, what is your view of vacation rentals (Airbnb, VRBO, etc.) in Sedona?

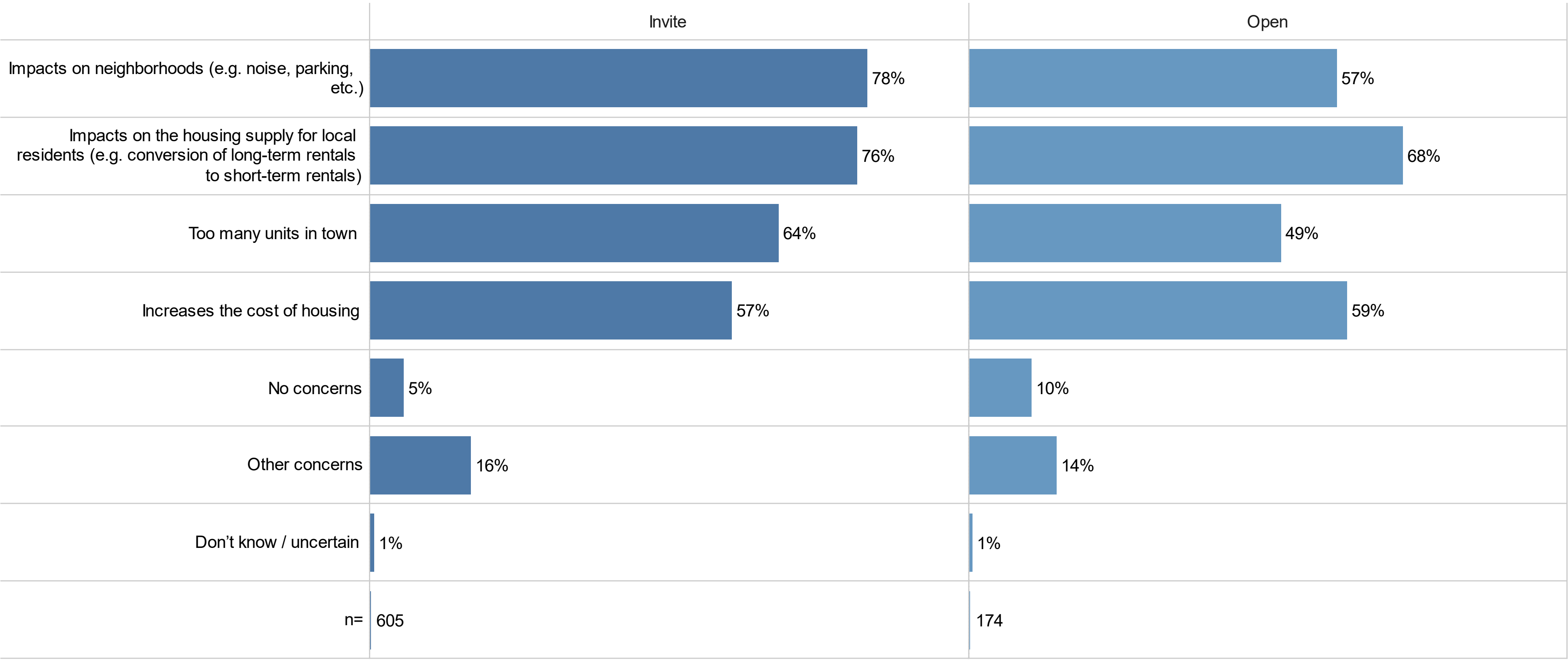


Source: RRC

VACATION RENTAL IMPACTS

Impacts on neighborhoods, housing supply and the number of units are top concerns for residents

What concerns, if any, do you have about vacation rentals in Sedona? (Check all that apply)

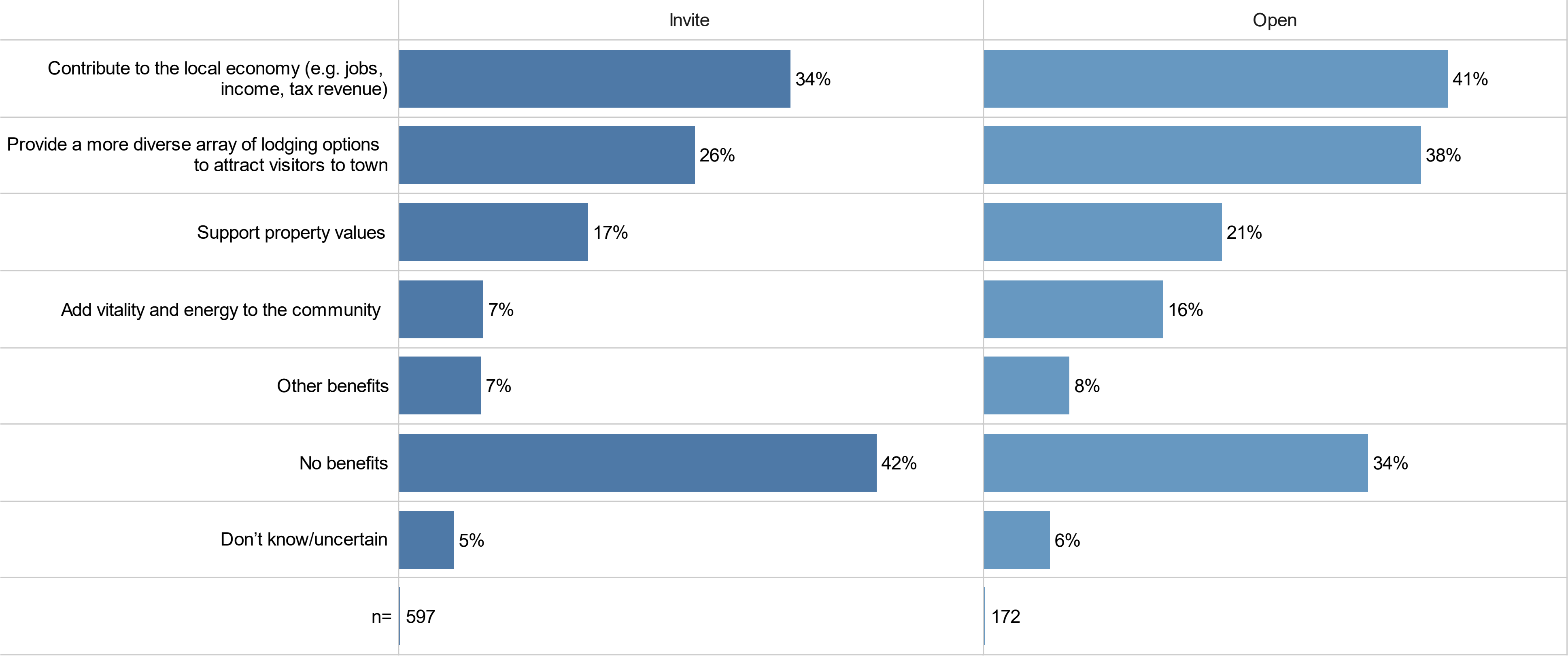


Source: RRC

BENEFITS OF VACATION RENTALS

There is some agreement that vacation rentals support the local economy but many still feel there are no benefits.

What benefits, if any, do you feel that vacation rentals bring to the community? (Check all that apply)

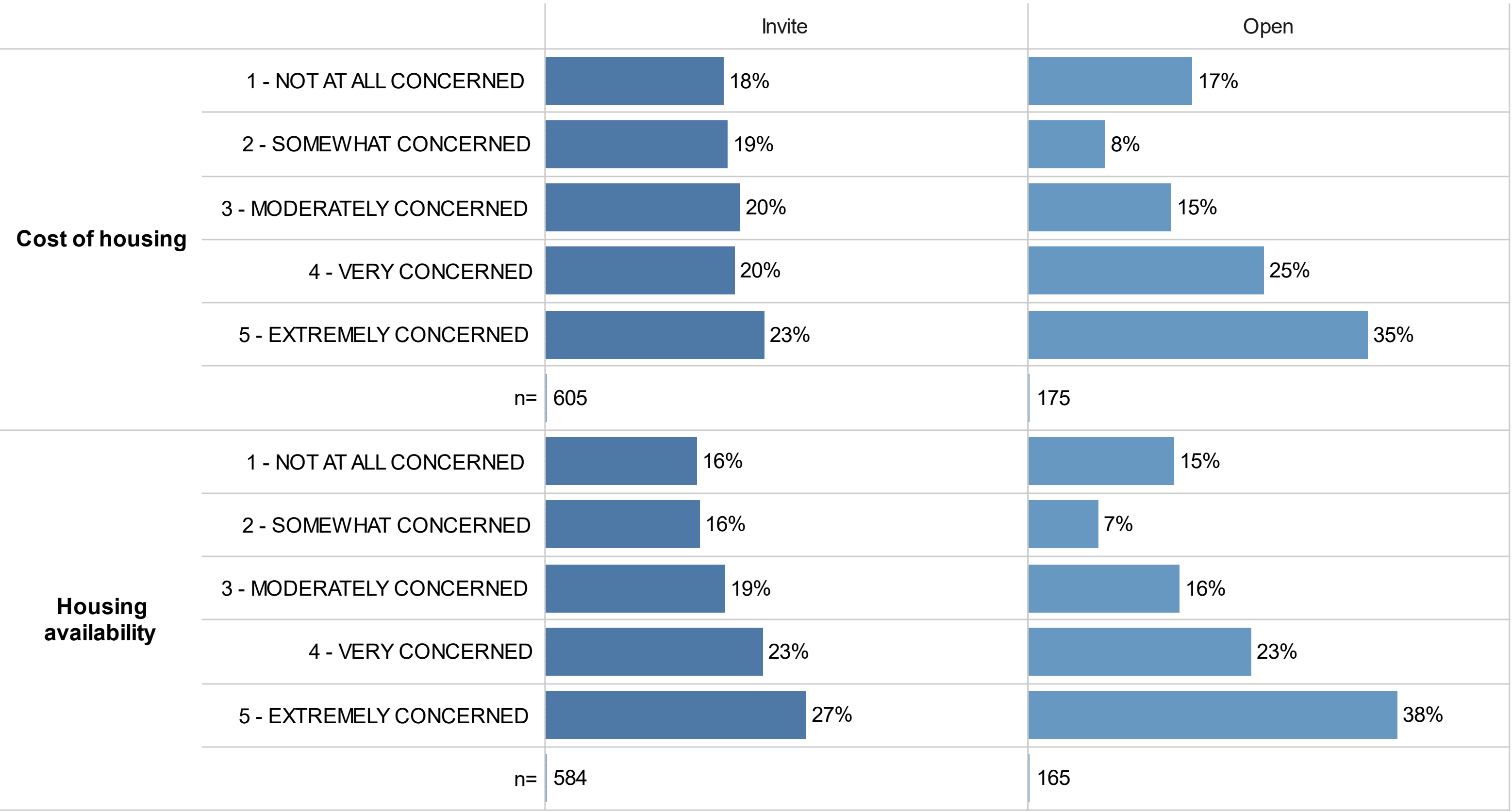


Source: RRC

CONCERNS WITH HOUSING

Half of invite respondents say they are very or extremely concerned about housing availability. Both availability and cost are bigger concerns for the open-link respondents.

How concerned are you about the following aspects of housing in Sedona

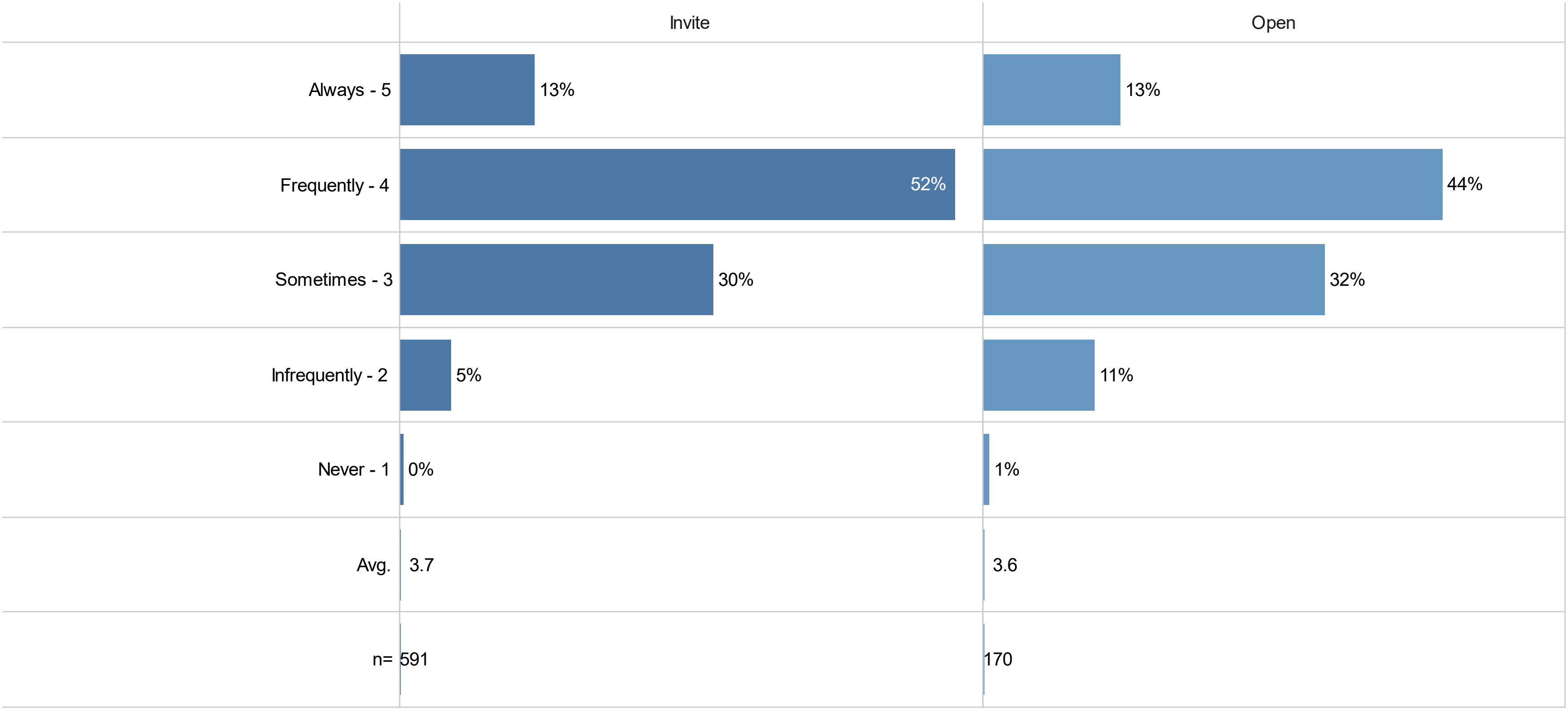


Source: RRC

EXPERIENCE WITH TRAFFIC

Traffic is a huge issue in Sedona. Two-thirds of invite respondents report “always” or “frequently” facing challenges getting around town.

Thinking about your overall experience with traffic in Sedona, how frequently do you experience challenges getting around town?



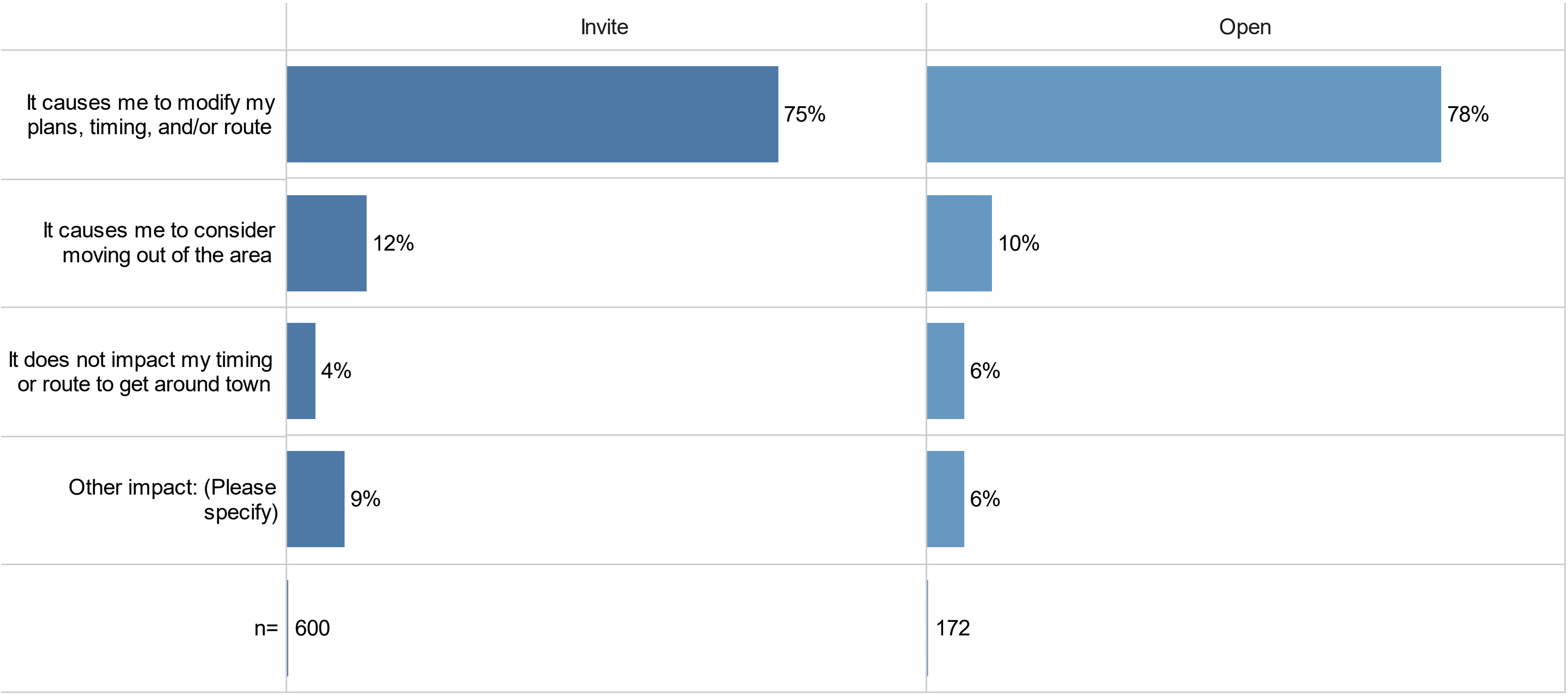
Source: RRC

TRAFFIC CONDITIONS

RRC

The large majority of both types of survey respondents modify their behavior in response to traffic challenges.

Do traffic conditions in Sedona at busy times cause you to modify your behavior?

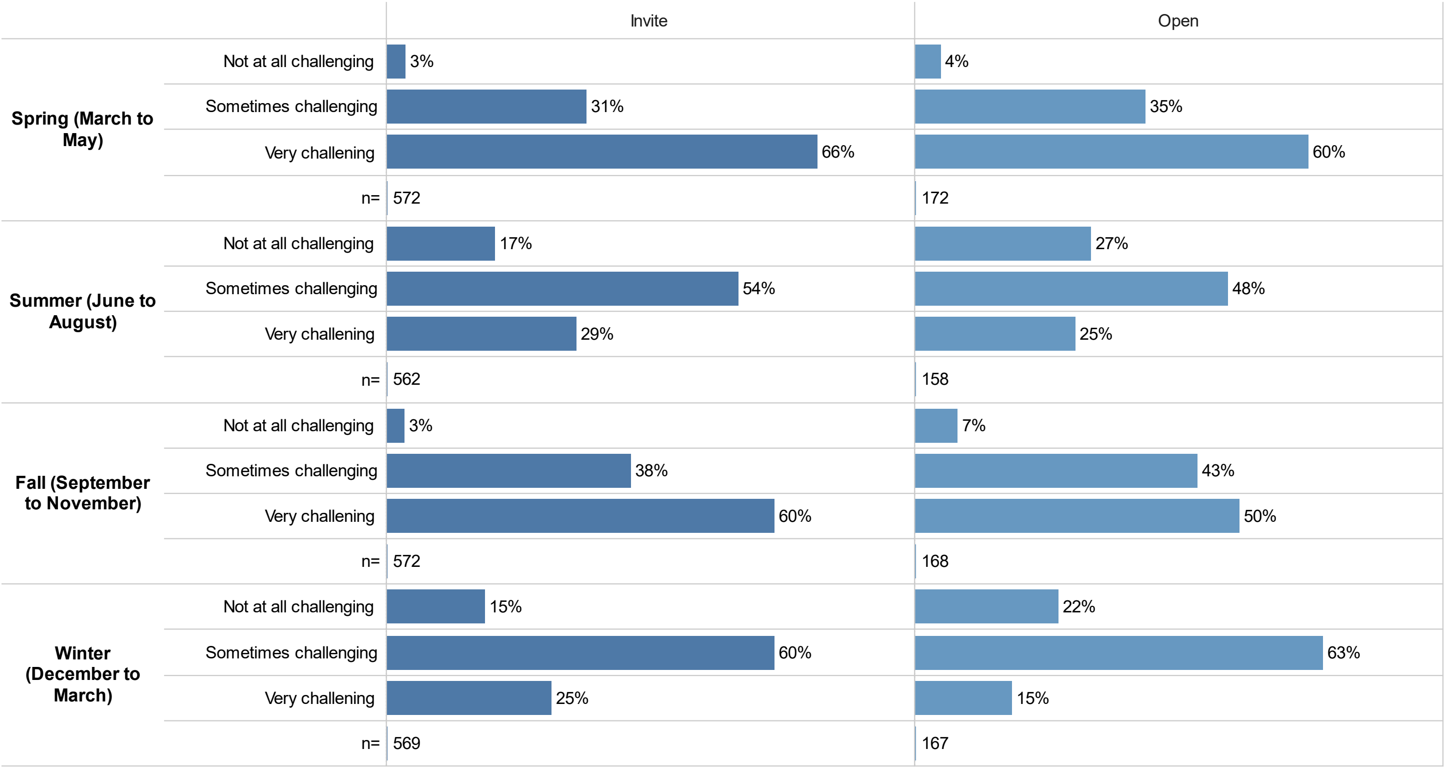


Source: RRC

TRAFFIC CHALLENGES BY SEASON

Shoulder seasons are clearly the easiest periods to navigate traffic while spring and fall are the most challenging.

To what extent do you experience any challenges, if at all, driving in Sedona during the following time periods?

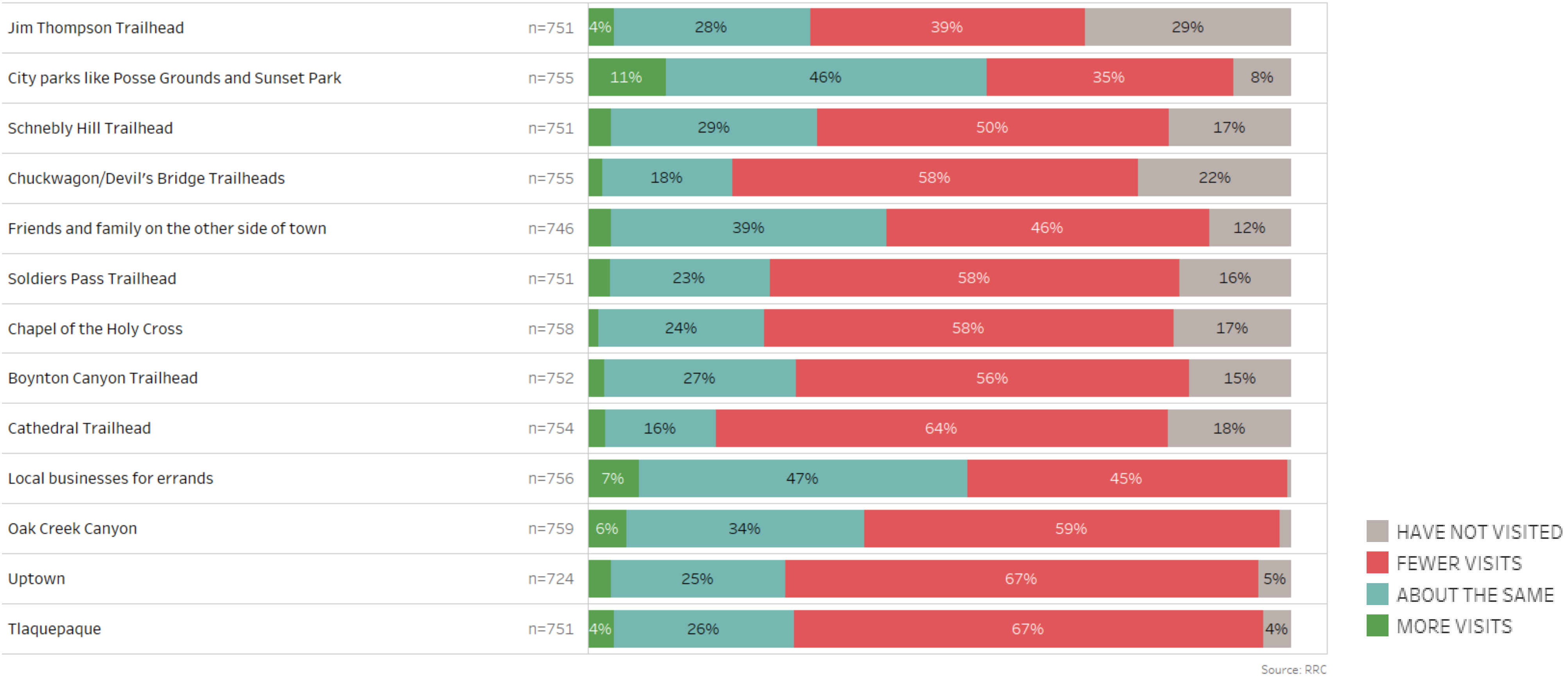


Source: RRC

USE OF LOCAL AMENITIES

Most people are visiting Sedona points of interest less often than in the past. Note this trend is not unusual for long-term residents in resort communities.

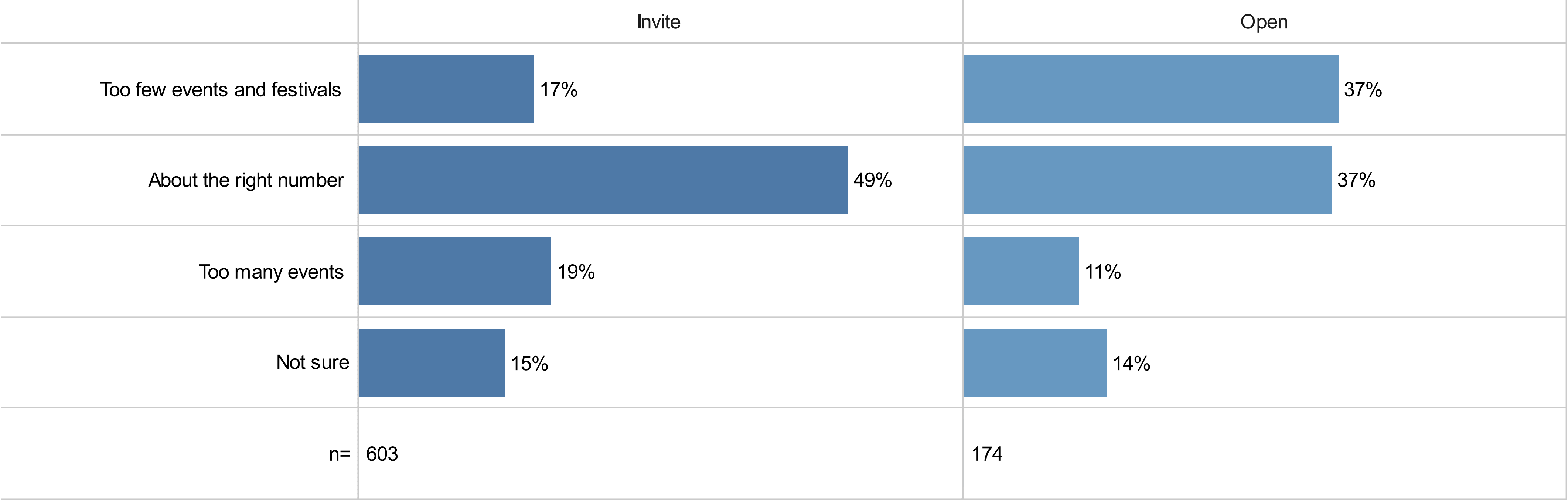
To what extent has your visitation/use of various locations in and around Sedona changed over time?



EVENTS IN SEDONA

Half of invite respondents feel that Sedona has the right number of events and festivals. Open-link respondents are more likely to support having more events in town.

With respect to the number of larger events and festivals in Sedona, do you think there are



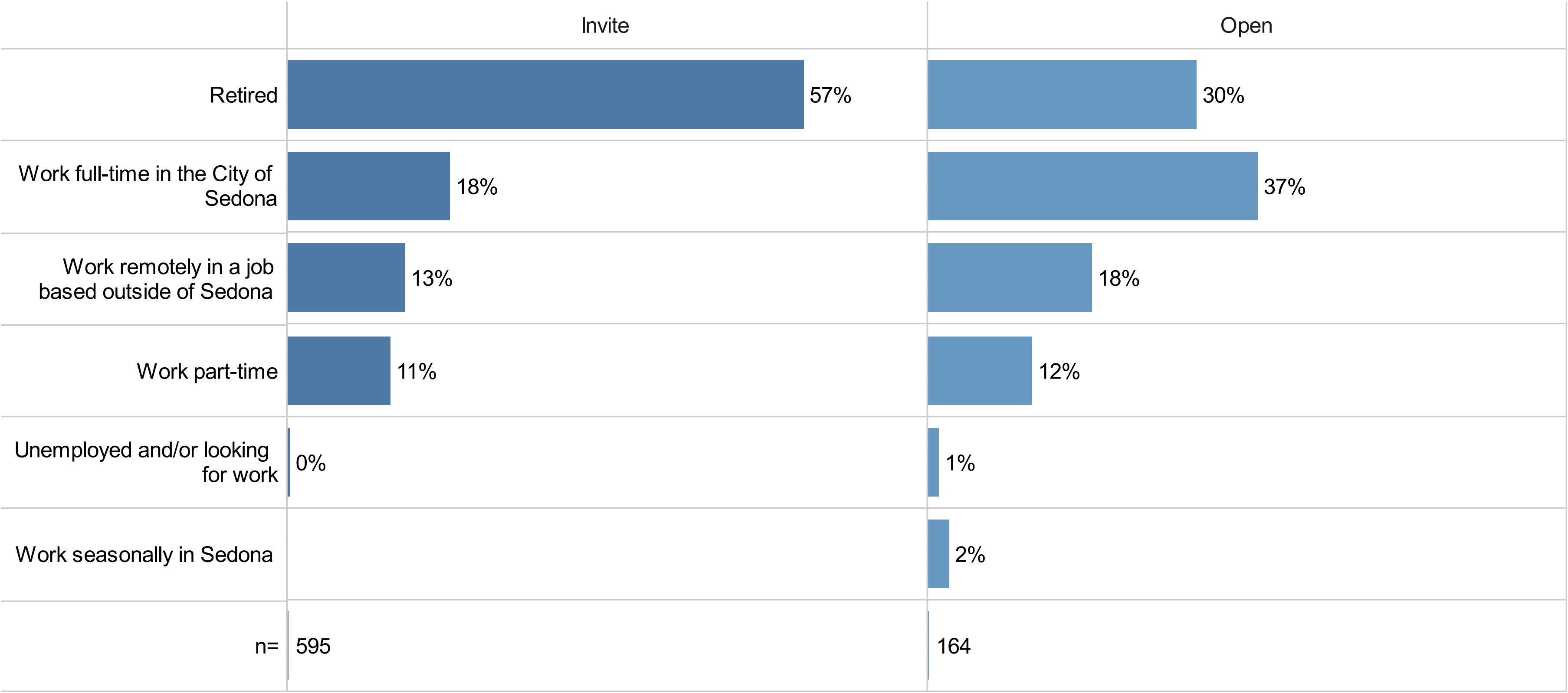
Source: RRC

DEMOGRAPHICS

EMPLOYMENT STATUS

Not surprisingly, the majority of invite respondents are retired. Over two-thirds either do not work or are employed part-time. Open-link respondents are more likely to work full time in Sedona.

What is your employment status?

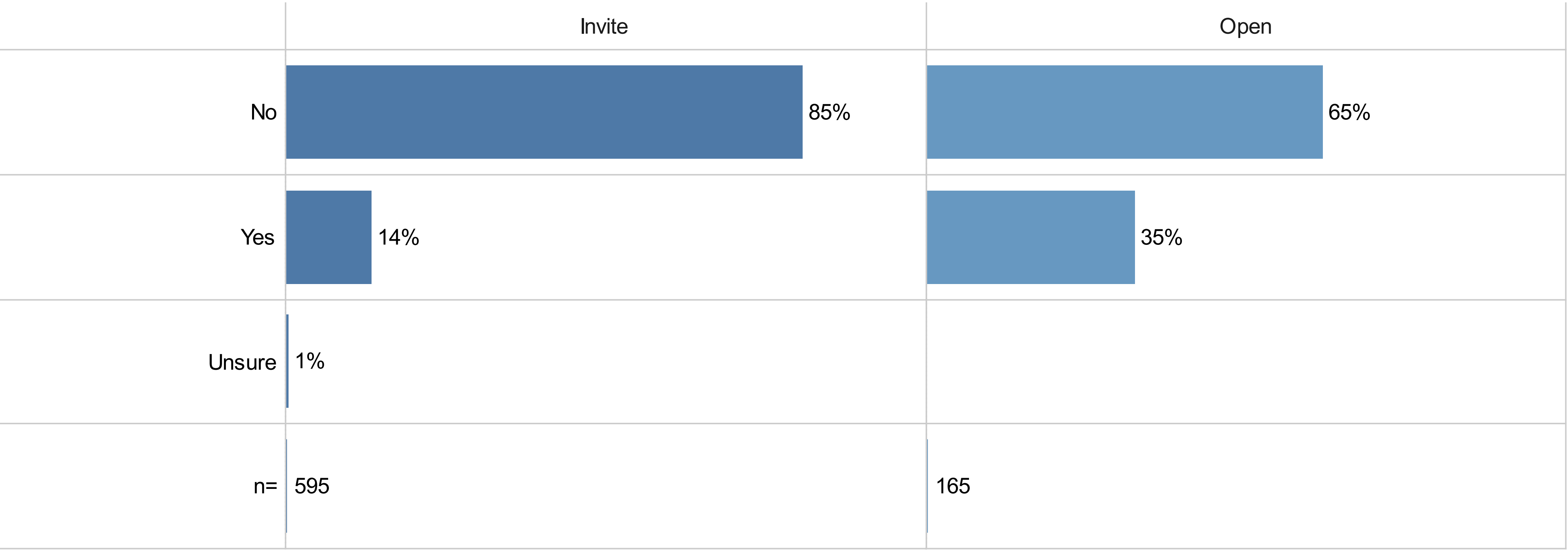


Source: RRC

TOURISM EMPLOYMENT

Just 14% of invite respondents work in the tourism sector and over one-third of the open-link sample rely on tourism for their occupation.

Do you work in the tourism industry in Sedona?

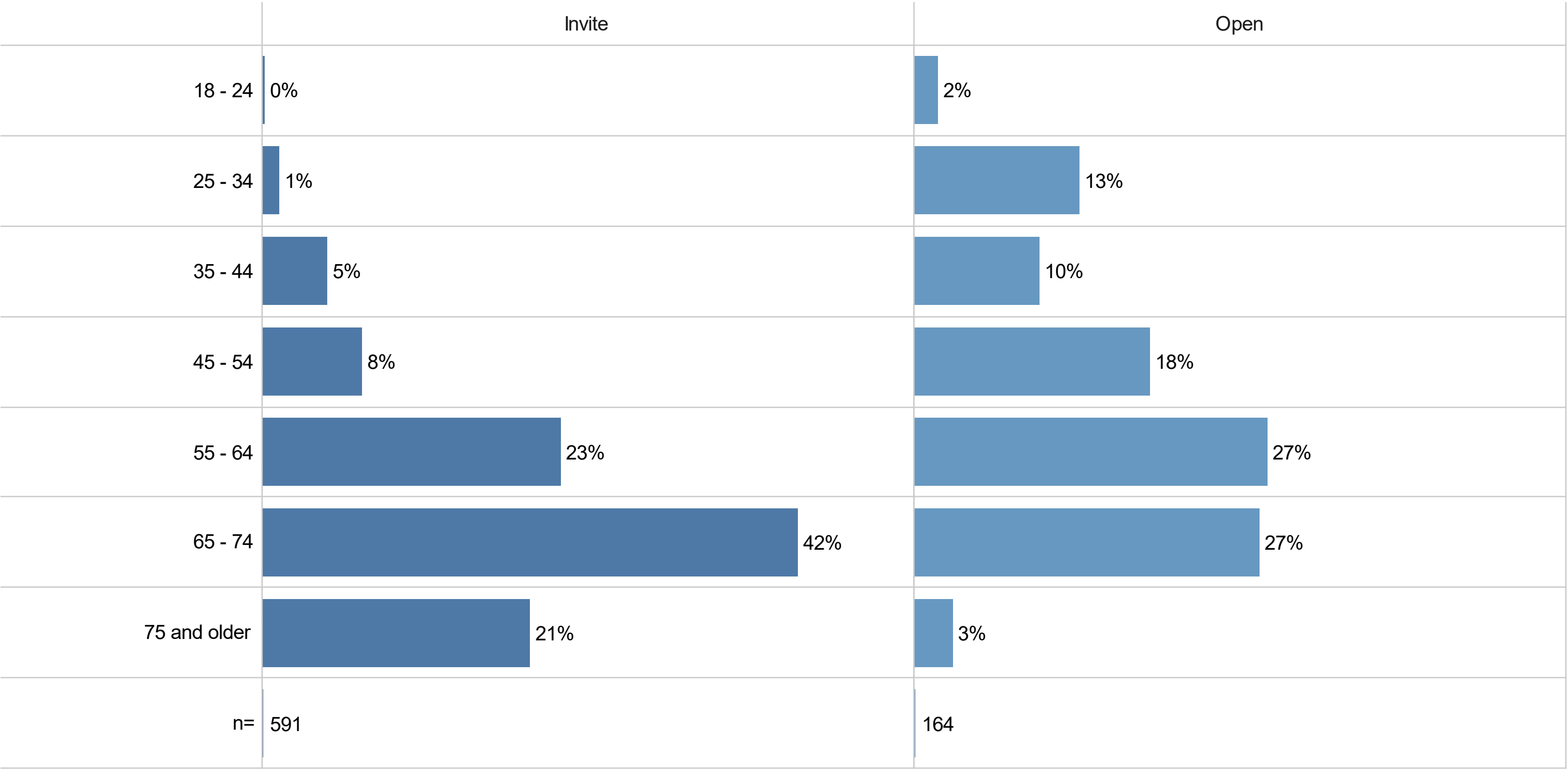


Source: RRC

AGE

Nearly 90% of invite respondents are over 55. Open-link respondents skew younger with 57% being 55+.

What is your age?

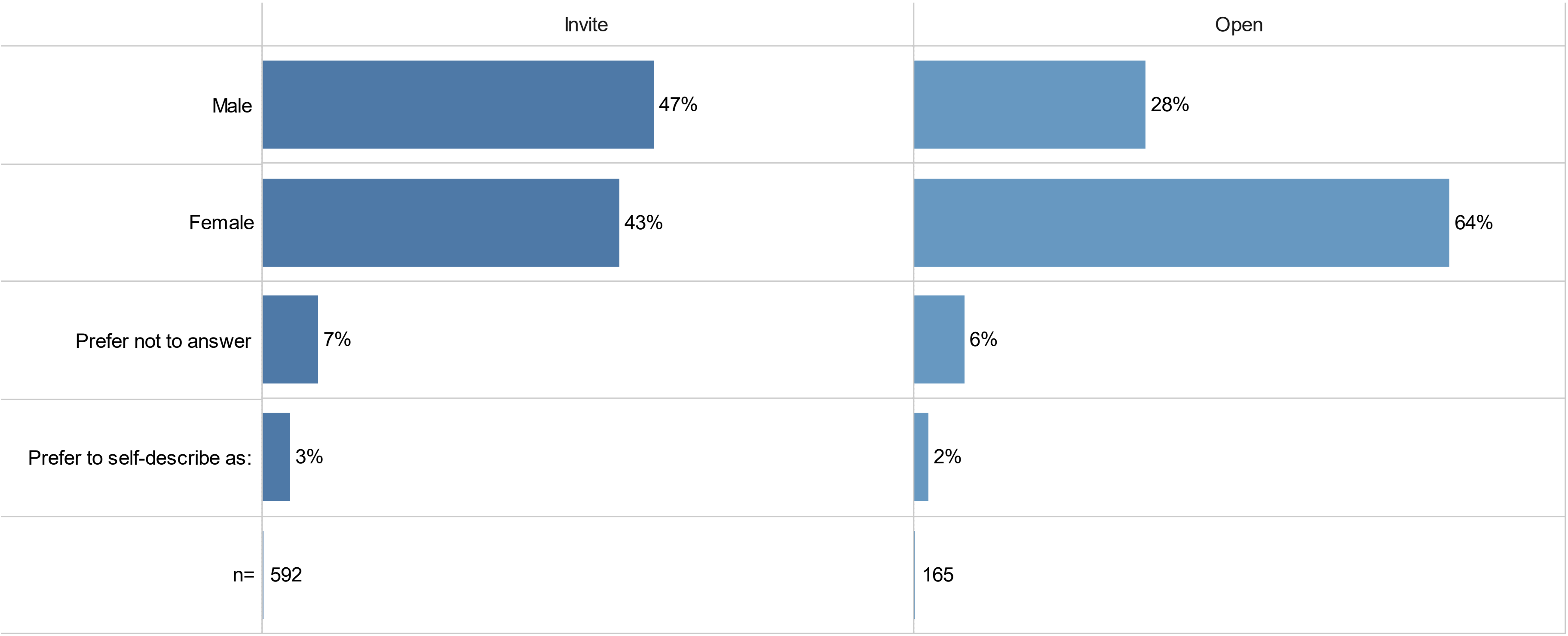


Source: RRC

GENDER

Invite respondents are split fairly evenly on gender but open-link respondents are mostly female.

Please indicate the gender with which you identify



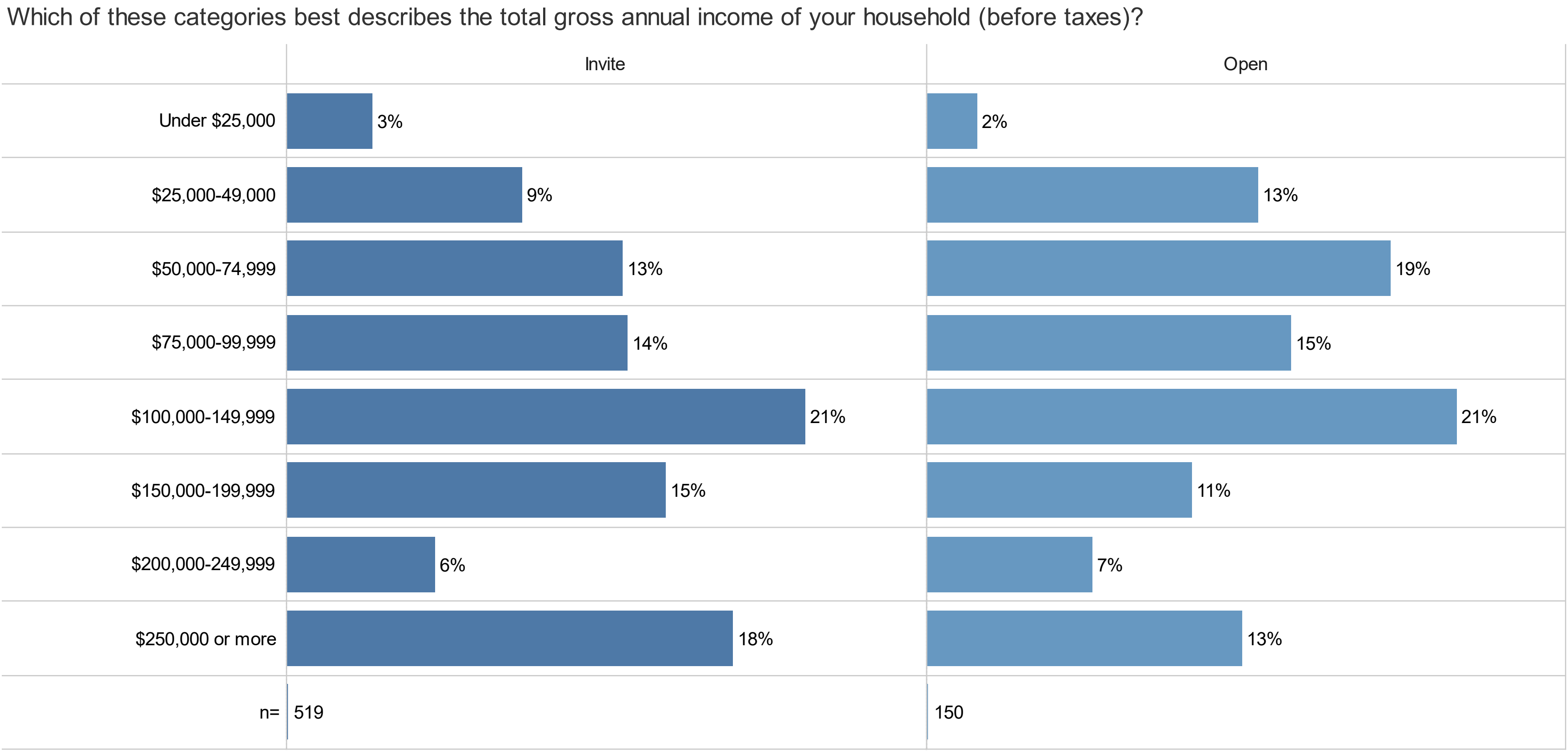
Source: RRC

n= 592 165

Source: RRC

HOUSEHOLD INCOME

Sedona is affluent. Despite the high percentage of retirees, 60% of invite respondents report HH incomes greater than $100,000 per year.

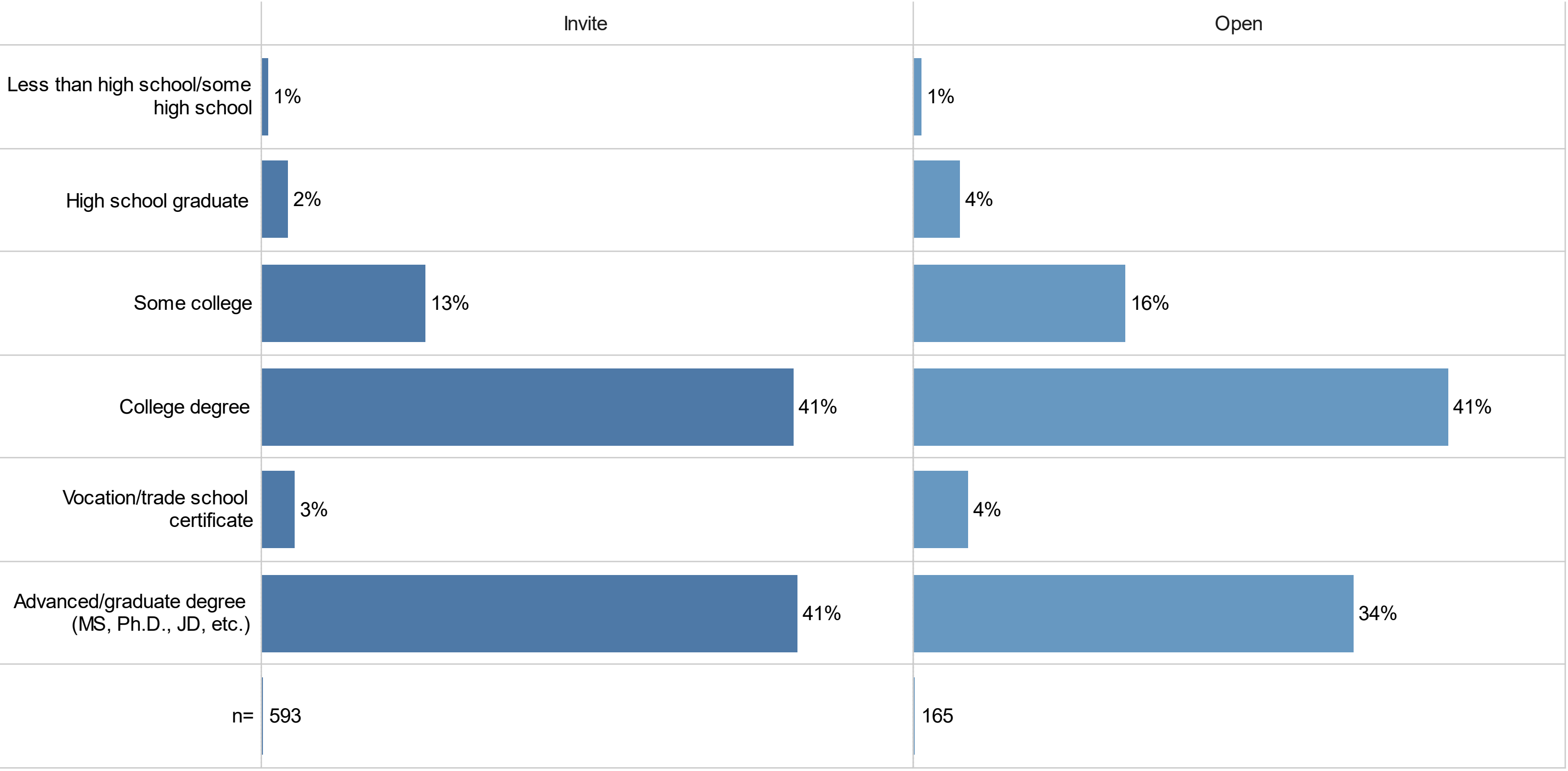


Source: RRC

EDUCATION

Sedona is highly educated. 82% of invite and 75% of open-link respondents have at least a college degree.

What is your highest level of education?

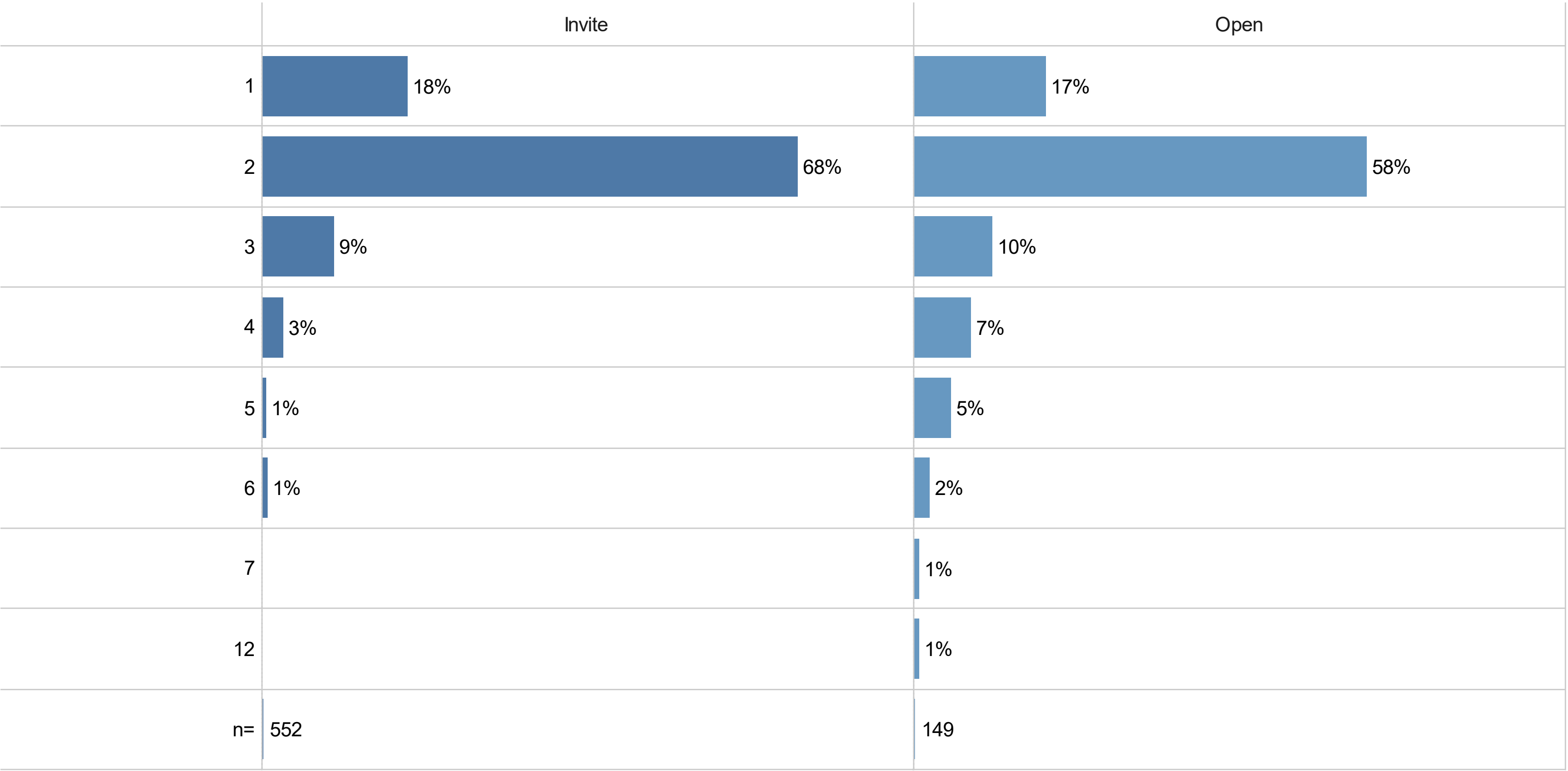


Source: RRC

HOUSEHOLD MAKEUP

Most Sedona residents live with a spouse or significant other.

Including yourself, how many people live in your household? (Enter 1 if you live alone)



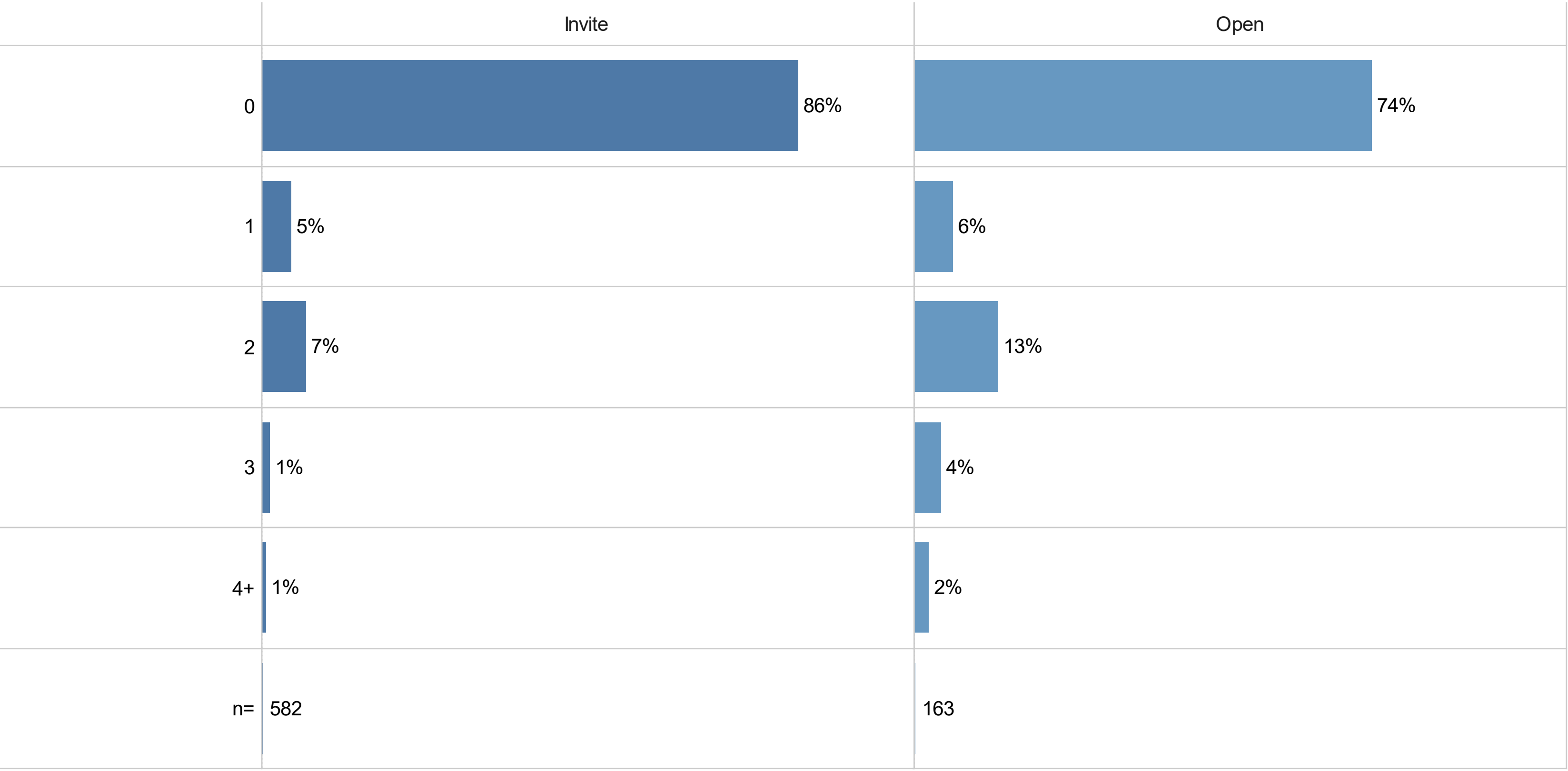
Source: RRC

HOUSEHOLD MAKEUP

RRC

Very few households in Sedona have children at home.14% of invite respondents report a household member under 18. This compares to the national average of 40%.

How many people in your household are under 18 years old?

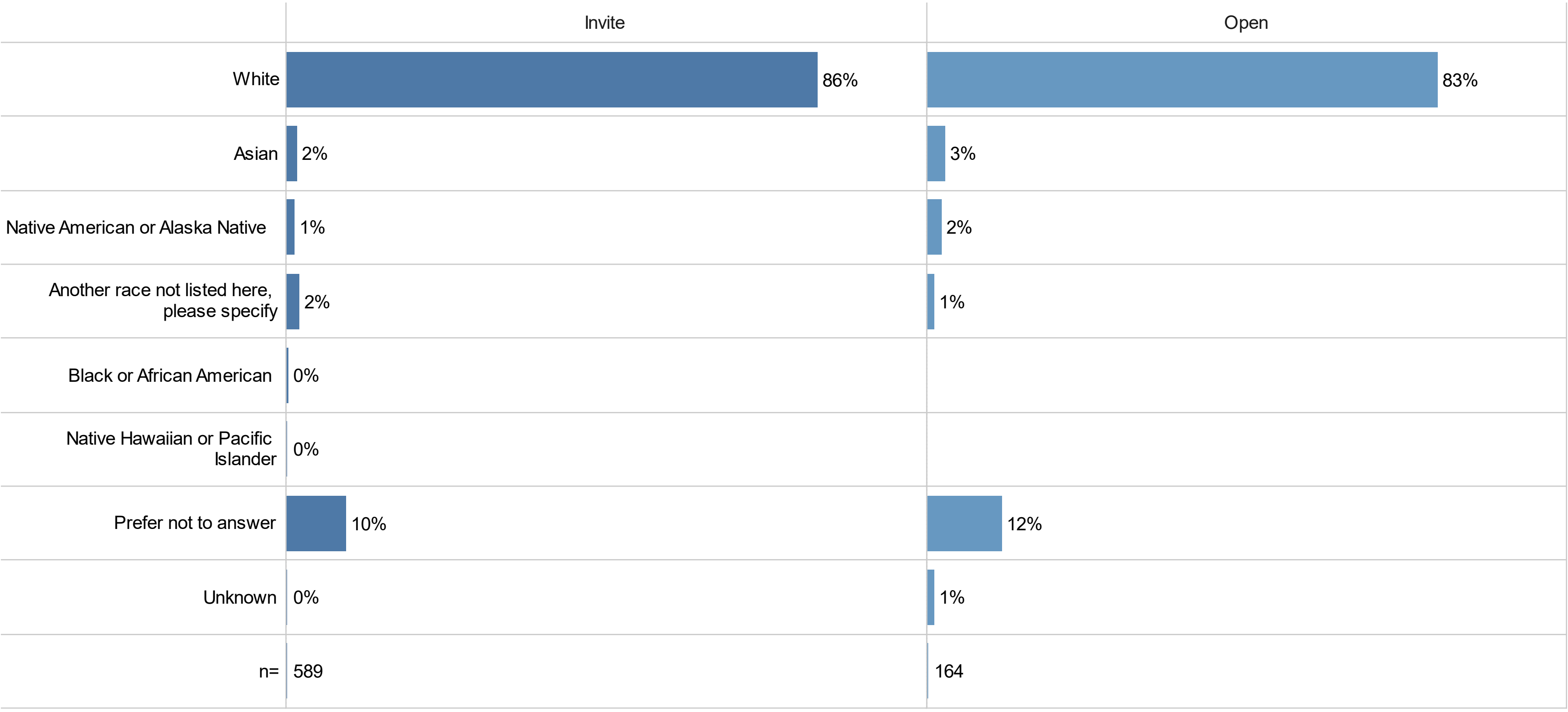


Source: RRC

ETHNICITY/RACE

Sedona residents are predominantly white.

Which race or ethnicity do you most identify with? (Check all that apply)

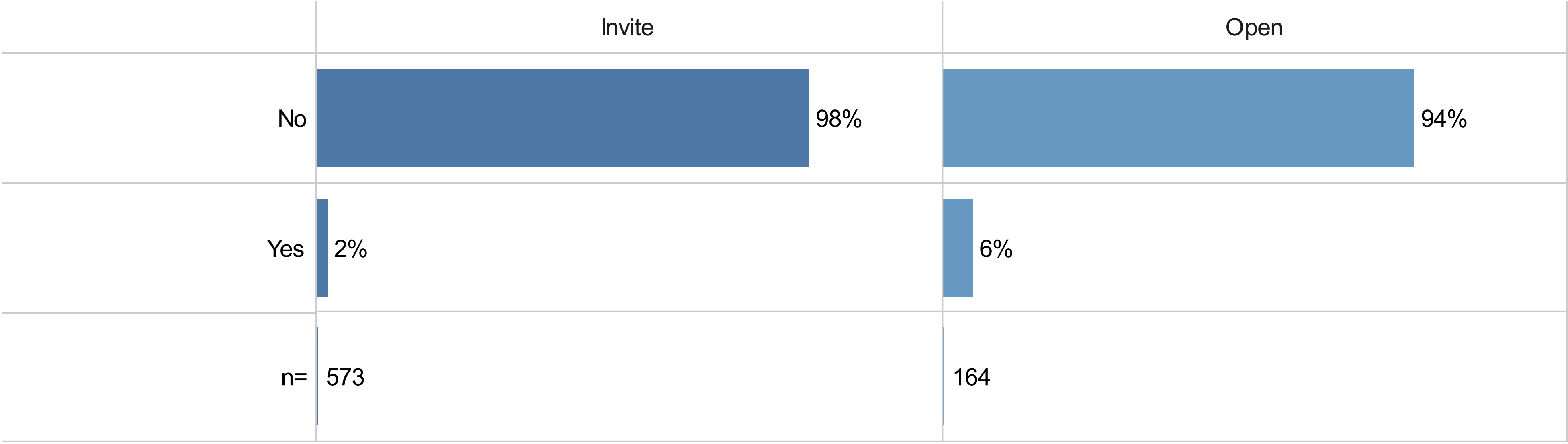


Source: RRC

ETHNICITY/RACE

Just 2% of Sedona respondents identify as Hispanic, compared to about 1/3 of Arizona residents.

Are you of Spanish, Hispanic, or Latino origin?



Source: RRC

THANK YOU!

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Future Partners

City of Sedona
Awareness & Perception Study 2024

Research Overview

About this Report

This is a comprehensive report of findings from the **City of Sedona Awareness & Perception Study** of 2024 conducted by Future Partners.

The goal of this research is to:

- Understand the primary motivations for travelers taking leisure trips to Sedona, Arizona.
- Identify the process and factors that inspire travelers' destination choices.
- Assess the level of awareness travelers have about Sedona.
- Gauge travelers' brand associations and overall perceptions of Sedona.
- Measure future travel intentions to Sedona
- Understand desired travel experiences in Sedona.
- Conduct a competitive analysis.

This report explores segmentations in terms of various relevant audience characteristics in order to tease out more targeted insights. These segmented data are often presented as clustered bars or columns alongside the total sample or within a separate chart, as opposed to a total sample chart. As such, please refer to the labeling within legends and in chart titles to ensure data is being interpreted appropriately.

About this Report (continued)

Throughout the report, terms to describe different levels of interest in or likelihood of visitation are used for shorthand.

These terms are defined below:

Likely / Highly likely near-term visitor – A traveler who is "very" or "extremely" likely to visit Sedona within the next 12 months.

Generally likely visitor **–** A traveler who is "somewhat" to "extremely" likely to visit Sedona, ever.

Highly likely visitor **–** A traveler who is "very" or "extremely" likely to visit Sedona, ever.

Never likely visitor – A traveler who is "not at all" likely to visit Sedona, ever.

Highly interested non-visitor / Convertible visitor – A traveler who has not visited Sedona as an adult and is "very" or "extremely" interested in visiting in the next 3 years.

Methodology

Respondent Sample Overview

The data presented in this report were gathered through an online survey of 1,998 adult travelers from the top 10 visitor origination markets gleaned from data sources. 200 travelers per market were surveyed, with the exception of San Diego, where there are 198 respondents in the sample.

The target markets are:

- Chicago
- Dallas - Ft. Worth
- Las Vegas
- Los Angeles
- Minneapolis - St. Paul
- New York City
- Phoenix
- San Diego
- San Francisco - Oakland - San Jose
- Seattle - Tacoma

Key demographic characteristics of the sample as analyzed in the report are provided at the end.

Data Weighting

Note that data presented in this report is weighted based on the population size of the target markets and age distributions of American travelers.

Executive Summary

Executive Summary

1. General Engagement with Sedona
2. Traveler Characteristics
3. Reaching and Attracting Visitors
4. What People Want in a Sedona Trip
5. Perceptions of Sedona
6. Competitive Position of Sedona
7. Values-Aligned Travelers
8. Overarching Insights

General Engagement with Sedona

Understanding and bolstering the City of Sedona's presence in the mind of the American traveler begins by examining the breadth and depth of traveler interaction with Sedona, from historical visitation patterns to future visit intentions. This section highlights the diverse levels of market-specific familiarity and the dynamic interest in Sedona, offering a succinct yet comprehensive snapshot of its standing as a destination of choice. This overview sets the stage for strategic engagement, enabling Sedona to harness its most sought-after characteristics and strengthen its connection with both potential and returning visitors.

1. Robust Past Engagement

Sedona has seen significant past visitation, with nearly 4 in 10 respondents from target markets having visited. City-level analysis reveals a strong engagement from regional markets, from Phoenix overwhelmingly (85.5% of respondents are past visitors) but also from Las Vegas (50.0%), indicating Sedona's appeal to nearby populations and the influence of geographical proximity on visitation patterns.

2. Strong Destination Recall

Sedona stands out as a top-tier Arizona destination, with over 20% of respondents across markets, and 26% overall, freely naming it as one of their top three destinations in the state that they'd like to visit in the next five years. Minneapolis respondents notably placed Sedona high on their list despite lower overall familiarity, indicating an underlying interest that can be leveraged in targeted marketing campaigns.

3. Awareness and Appeal

Slightly over a quarter of the target market is highly familiar with Sedona, reflecting some branding presence. Still, disparities between past visitation (38%) and high familiarity (26%) indicate that a portion of past visitors do not feel very familiar with Sedona, which could signal an opportunity to connect more deeply with visitors.

4. Diverse Market Interest

Interest in visiting Sedona is robust across markets, with nearly half of all surveyed travelers reporting being "very" or "extremely" interested in visiting in the next 3 years. Phoenicians are overwhelmingly inclined to visit (64%), signifying a loyal regional audience, but far-away New Yorkers (52%) & Chicagoans (49%) are also enthusiastic.

5. Excitement

Among a set of competitor destinations*, travelers are most excited to visit Sedona, particularly within the Phoenix, LA, New York, and Las Vegas markets. This is a clear indication that Sedona's natural beauty and recreational opportunities have successfully resonated with a broad audience.

*Competitor set includes Jackson Hole, WV; Moab, UT; Park City, UT; Santa Fe, NM; St. George, UT; and Telluride, CO

6. Intent to Visit

There is a strong intent to visit Sedona in the near term, with 60% of likely visitors considering a trip within the next two years, and 1 in 5 respondents reporting that they are "very" or "extremely" likely to visit within the next 12 months. These results show the appeal of Sedona's offerings.

Traveler Characteristics

Sedona's allure attracts a diverse range of travelers, yet distinct patterns emerge when focusing on characteristics of likely visitors. Insights drawn from travel budget analysis and psychographics offer a nuanced understanding of the market – both overall and among the Sedona-inclined.

1. Budget Analysis

- Travelers drawn to Sedona show a readiness to invest in their travel experiences. Past visitors and those likely to visit soon typically have higher budget allocations, with 40-44% setting aside over $5,000 (vs. non-visitors at 36%, and especially the relatively uninterested at 32%) signaling Sedona's appeal to affluent travelers.
- The attraction of higher-budget travelers, particularly from affluent markets such as San Francisco and Seattle, points to a potential demand for premium experiences and services tailored to luxury preferences.

2. Psychographic Patterns

- Travelers are generally defined by a strong inclination towards novelty-seeking, with high engagement in discovering local secrets and experiencing new cultures.
- Likely near-term visitors to Sedona are more likely to value travel for being outside & connecting with nature and spiritual enhancement, aligning well with Sedona's unique blend of outdoor beauty and spiritual offerings.

3. Travel Motivations

- The primary motivations for travel—exploration, relaxation, and personal indulgence—mirror the diverse tapestry of experiences available in Sedona.
- Different age groups show varied motivators, from Millennials seeking adventure to Boomers valuing historical insights, indicating a need for varied marketing messaging. Customized itineraries could satisfy the intrinsic desires of each age cohort, tapping into different aspects of Sedona's multifaceted offering.

4. Emotional Aspirations

- While travelers primarily want to feel relaxed when they are on vacation, they also yearn for excitement and aliveness.
- Among those highly likely to visit, there is a distinct desire for transformative experiences that leave them feeling inspired, connected, and vibrant when compared to never likely visitors. This emotional landscape aligns with Sedona's positioning as a destination that offers personal enrichment.
- Promotional strategies can capitalize on all these desires by spotlighting Sedona's capacity for personal rejuvenation.

Reaching and Attracting Visitors

The quest to effectively reach and attract potential visitors to Sedona demands a multifaceted approach informed by evolving media consumption trends and the significance of specific travel decision factors.

1. Travel Inspiration Sources

Internet searches reign supreme as sources of travel inspiration. Online review sites also attract attention, signaling the persuasive power of peer recommendations. Importantly, official destination websites emerge as a key resource among higher-value visitor groups, offering DMOs opportunities for conversion through tailored content and enhanced user engagement. Investing in the user experience of official sites may help them better attract and engage with potential high-value visitors.

2. Resources for Destination Activities

The preference for online resources is clear, but Visitor's Centers maintain some relevance among distinct visitor segments such as Baby Boomers and those committed to sustainable travel practices. This strategic use of Visitor's Centers may call for a tailored approach to information provision.

3. Media Consumption Behaviors

A deep generational divide in media consumption habits reveals the growing shift towards digital content, illuminating the need for a diversified media strategy. Traditional channels retain their hold among travelers age 44+, while younger cohorts are deeply embedded in digital and social media.

4. Destination Attributes Considered in Selection

The appeal of scenic vistas and perceived value underscores the universal search for beauty and affordability. However, distinctive attributes such as community inclusivity, cultural immersion, and eco-adventures particularly resonate with convertible non-visitors, suggesting areas for targeted promotion to foster deeper emotional attachments and increase the likelihood of visitation.

Perceptions of Sedona

Understanding Sedona's multifaceted image in the eye of the American Traveler requires an examination of the viewpoints of those who have encountered Sedona's unique blend of natural beauty and cultural richness, those who have immediate intention to experience these elements they've yearned for, and those who are reluctant to visit Sedona in both the near and long terms. An analysis of qualitative data offers additional insight into unaided perceptions of Sedona.

1. Satisfaction of Past Visitors

- Overall, 76.8% of past visitors report being highly satisfied with their experience, and only 0.3% report no satisfaction.
- One-third of past visitors report being "extremely satisfied," with those from cities like Las Vegas and New York City showing even greater contentment. This suggests that Sedona's tranquil environment may offer a compelling contrast to urban life.

2. Motivators for Visiting Sedona

- Being surrounded by scenic beauty, relaxation, and being outdoors experiencing nature emerge as the top reasons for visiting, highlighting Sedona's strength as a destination for rejuvenation amidst nature's splendor.
- In fact, while scenic beauty and experiencing nature fall outside of the top 3 for *general* travel motivators – trailing the top "to explore and do new things," "for rest and relaxation," and "to treat myself" by over 10 percentage points, they are #1 and #3 among Sedona-specific travel motivators.

3. Ratings of Sedona's Performance on Destination Attributes

- While scenic landscapes and outdoor activities score exceptionally high, there is room to improve accessibility and awareness, indicating opportunities to enhance Sedona's appeal and convenience as a travel destination.
- A 2x2 quadrant analysis of importance vs. perception of Sedona's performance on attributes reinforces the need to focus on strengthening or better positioning ease of access.
- The quadrant analysis also highlights Sedona's underperformance (relative to other qualities) on the important attributes of "variety of special events and festivals" and "variety of museums and art galleries."

4. Barriers to Visiting

- Time constraints and perceived costs are primary concerns deterring potential visits among those reporting they are not at all, somewhat, or moderately likely to visit Sedona in the next 12 months. Strategic marketing that accentuates value and accessibility may help to mitigate these barriers and encourage broader interest in Sedona.
- Among those who are not at all likely to visit in both the near- and long-term ("ever"), a lack of general awareness of Sedona's strength as a vacation destination factors in heavily compared to the full group. Additionally, never-likely visitors perceive better-value opportunities elsewhere and a lack of activities that interest them in Sedona.

What People Want in a Sedona Trip

The exploration of Sedona as a travel destination reveals critical insights into the preferences and planning behaviors of potential visitors, underlining the city's rich potential to offer diverse travel experiences throughout the year.

1. Traveler Logistical Preferences

Sedona's potential visitors show a clear preference for spring visits, mid-range lodging options and vacation rentals, and stays of around three days. Likely near-term visitors do express some differences, for example favoring luxury hotels at a higher rate (36% vs. 26% of the whole sample of generally likely visitors), hinting at a market for upscale experiences.

2. Activity Preferences

Preferences for activities in Sedona are diverse. Though natural attractions are generally most popular, culinary experiences, entertainment such as live music, and cultural attractions also garner interest. Interest in the spiritual options provided (e.g., crystals, meditation at vortex sites) was relatively low, averaging at 22% of likely visitors.

3. Strategic Opportunities

The data indicates room for growth in marketing Sedona as a luxury destination, with tailored content for families and couples, and for promoting off-peak travel to balance the seasonal influx. Additionally, with 27% of likely near-term visitors leaning towards short-term planning of 2-4 weeks (a significantly higher rate than the 10% of likely visitors overall), flexible & last-minute booking options can capitalize on and cater to this trend.

4. Experience Development

There is an opportunity to develop compact itineraries that showcase Sedona's top attractions and unique wellness offerings, ensuring travelers can fully experience the city even during shorter stays.

Competitive Position of Sedona

Unpacking how Sedona stacks up among Arizona's most sought-after destinations as well as the depth of its market penetration amidst a cohort of pre-defined rivals illuminates the competitive terrain, helping to carve a niche that resonates with the evolving expectations of today's discerning traveler.

1. Sedona's Ranking Amongst Arizona Destinations

In an open-ended survey of respondents, Sedona emerges as a top-tier destination within Arizona, frequently named as a #1 choice and overshadowed only by the Grand Canyon and Phoenix.

2. Awareness and Familiarity

Amidst competition, Sedona holds a significant place in public awareness in target markets, rivaled closely by Santa Fe. This points to a competitive edge in destination familiarity and potential for visitor conversion.

3. Visitation and Interest Levels

Past visitation trends and expressed interest suggest Sedona's appeal is enduring, widespread, and stronger than its competitors'.

4. Excitement and Market Preference

Sedona leads in generating excitement, especially among travelers from key markets like Phoenix and Los Angeles, underscoring its appeal to nearby demographics.

5. Differentiators

An open-ended request for destination differentiators revealed that Sedona stands out in the competitive landscape with its unique blend of distinctive natural beauty, cultural richness, and spiritual offerings. While other destinations were also freely associated with scenery, only Sedona received mention of iconic natural features, specifically its red rock formations, and spiritual and wellness elements. By contrast, competitor destinations were often most associated with skiing or touring national parks. Santa Fe is the only city that rivals Sedona in its diversity of differentiators. Leveraging its unique attributes, Sedona can enhance its allure, emphasizing its position as a holistic destination that offers a connection with nature, wellness, and the arts.

Values-Aligned Travelers

The quest to understand the nuanced segments within Sedona's visitorship leads to a deep dive into the demographics, psychographics, and value systems of three distinct traveler types who are most aligned with Sedona's values and tourism goals. They are described and summarized below:

1. Leave-No-Trace Adherents

These individuals hold a strong environmental ethic and make efforts to uphold the principles of minimal impact on nature when traveling. They are typically well-educated, engage with online media and review sites for travel inspiration, and show a preference for outdoor and cultural experiences. Satisfaction levels for past visits to Sedona are notably high among this group, indicating successful resonance with Sedona's environmental stewardship. While San Francisco and Seattle markets show the highest alignment with this persona, overall, the group has the most representation from NYC and LA, due to the size of those markets.

2. Sustainability Prioritizers

Travelers who emphasize sustainability initiatives are more likely to be male and younger compared to the total target market. New York City is a strong market for these travelers, who tend to look for destinations that mirror their commitment to eco-friendly practices. This group additionally seeks out eco-adventures, special events, live music, and spiritual activities within their travel experiences and engages with online videos for travel inspiration.

3. High-Value Travelers

This affluent group, characterized by having a substantial travel budget exceeding $5,000 for the next year, desires luxury and premium experiences. They are more likely than the average target-market traveler to seek 5-star hotel stays in Sedona and to prioritize fine dining and museums & art galleries in their destination selection. Their older demographic and higher income brackets align with these preferences. High-Value Travelers also rely more heavily on travel review sites and official destination websites for travel inspiration.

Comprehensive profiles of these travelers are included in the detailed findings, providing insights to help Sedona develop experiences and marketing strategies that resonate with each segment's unique values & preferences. By aligning its positioning with the self-identifiers and motivators of these groups, Sedona can enhance its appeal and attract visitors who will appreciate its offerings and care for its natural assets.

Overarching Insights (1 of 2)

1. Sedona's Magnetism

Sedona stands out as a top-tier destination due to its spectacular landscape, outdoor adventures, spirituality, art, and wellness offerings. This unique blend of natural beauty, cultural richness, and a sense of the mystical creates a powerful draw that resonates strongly with a wide range of travelers nationwide. There is robust interest in visiting Sedona, with nearly half of respondents expressing strong interest. Additionally, there is an evident desire to return among past visitors.

2. Potential to Improve Visitor Experiences

Though past visitors intend to travel to Sedona in the near-term at higher rates than the target market overall, a significant proportion of past visitors did not report high familiarity with Sedona, suggesting there is room for visits to be more memorable. A closer look at the data showed that about half of past visitors to Sedona reported being "very" or "extremely" familiar with the destination, while 1 in 5 reported low familiarity. This indicates an opportunity to improve the visitor experience, potentially leading to increased familiarity and repeat visitation.

3. Immersive Sanctuary

Travelers seek more than just leisure in Sedona; they look for enrichment and adventure. The destination draws on motivations to be surrounded by natural beauty and holds a particular appeal for those who seek to connect with others and the environment, explore new cultures and experiences, and have outdoor adventures. Sedona's ability to offer meaningful connections, along with its emphasis on sustainability and eco-friendly practices, provides a strong competitive edge.

4. Luxury Market Potential

Growth potential exists in the luxury travel segment. Affluent travelers with larger budgets show a strong interest in Sedona and a preference for luxury experiences offered there.

Overarching Insights (2 of 2)

5. Competitive Landscape

Sedona enjoys a competitive edge over all tested destinations in key metrics of familiarity, interest, and appeal. However, Santa Fe presents a strong rival: Those who report lower likelihood of visiting Sedona express more interest in and excitement for the New Mexico capital[1], and the city's differentiators were also diverse with a focus on cultural offerings. Understanding competitor strengths can inform a more precise marketing strategy.

6. Strategic Positioning for Growth

Leveraging insights on travel motivations and media consumption behaviors, Sedona can capitalize on its competitive position by focusing on experiential marketing and digital engagement to effectively target both new and returning visitors across generations.

7. Diverse Visitor Segments

Visitors come to Sedona with diverse needs and preferences, seeking diverse experiences: romantic vacations, family adventures, short getaways, cultural immersion, wellness retreats, nature tours, etc. They also have different psychographic and behavioral profiles. Understanding how these differences cluster can inform a nuanced marketing approach tailored to various segments.

Some segments, like affluent travelers, show a preference for luxury experiences, such as 5-star hotels, fine dining, and art galleries. Others prioritize minimal environmental impact, cultural immersion, and outdoor experiences, while others, still emphasizing eco-friendly practices and seeking outdoor adventures, also crave special events / festivals and live music. These desires reflect Sedona's versatility and broad appeal.

A common thread among these segments and those interested in Sedona more broadly – one that stands out compared to the average traveler – is the pursuit of mind-expanding experiences, including gaining cultural & historical knowledge and personal insight. Sedona uniquely facilitates these experiences through its stunning landscapes and vibrant local culture. A comprehensive understanding of these travelers can inform marketing strategies & visitor experience improvements, helping cement Sedona's position as a destination that not only provides a beautiful vista–which is exceptional in and of itself–but also offers a truly transformative experience.

[1] Data not presented in report, but can be provided upon request

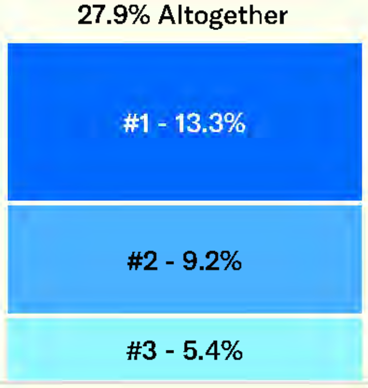
Detailed Findings

General Engagement with Sedona

General Engagement At-A-Glance

Past Visitation* & Unaided Appeal of Future Visitation

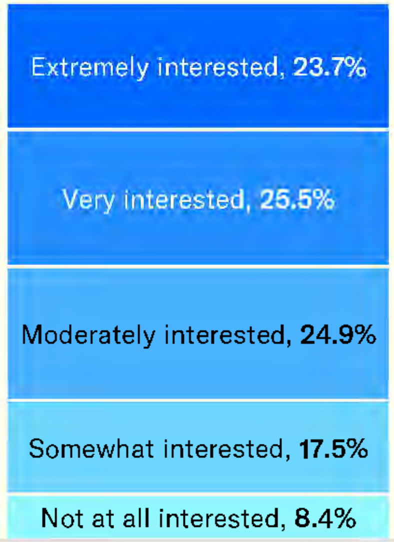
*%ages do not add to 100% because respondents could have done both a day trip and an overnight visit.



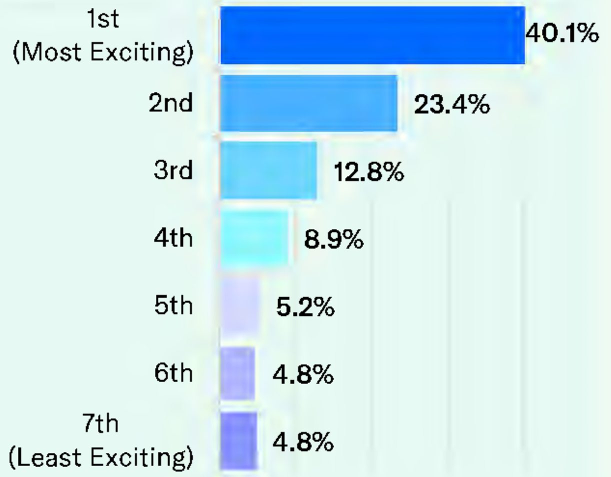
Free Response: Sedona as a #__ Most Desired Arizona Destination to Visit in the Next 5 Years

Awareness / Familiarity

Interest in Visiting

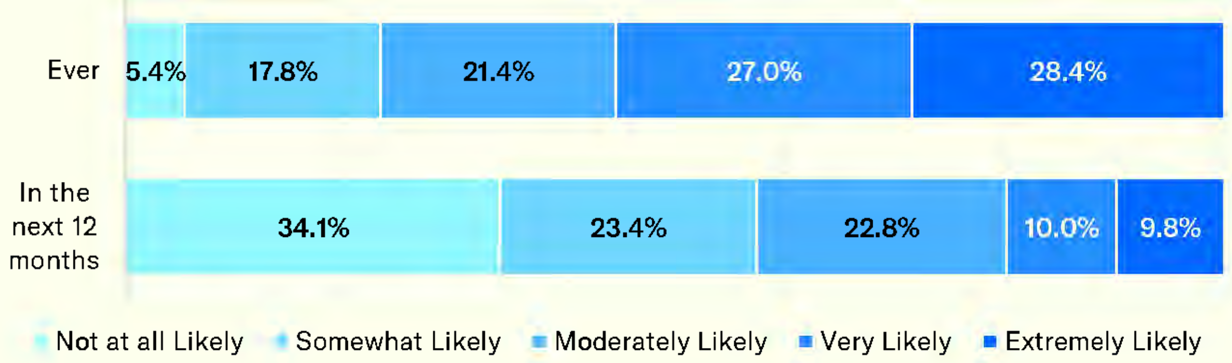


Excitement



% of Respondents Ranking Sedona in __th Position among 6 Competitor Destinations

Likelihood to Visit (in specified time span)

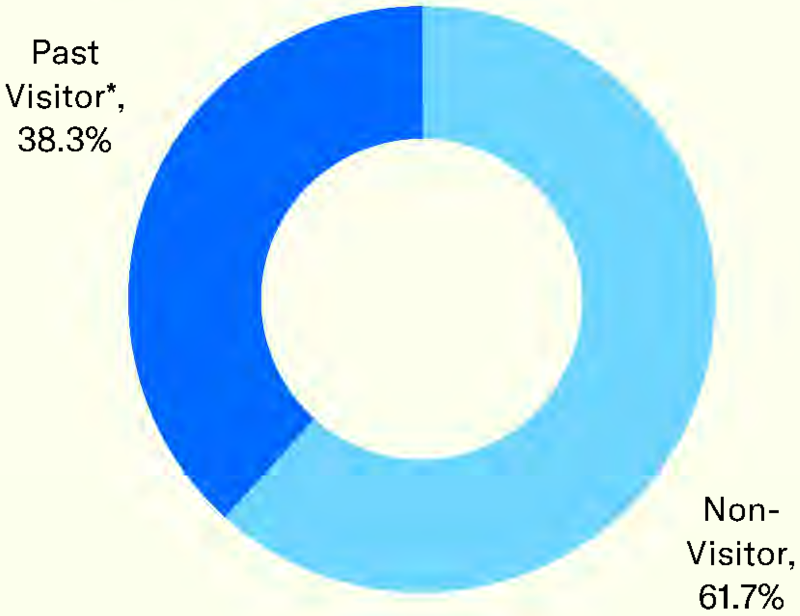


Base: Total respondents. 1,998 completed surveys.

A substantial portion (38.3%) of respondents have visited Sedona in the past, with an even split between day trips and overnight stays

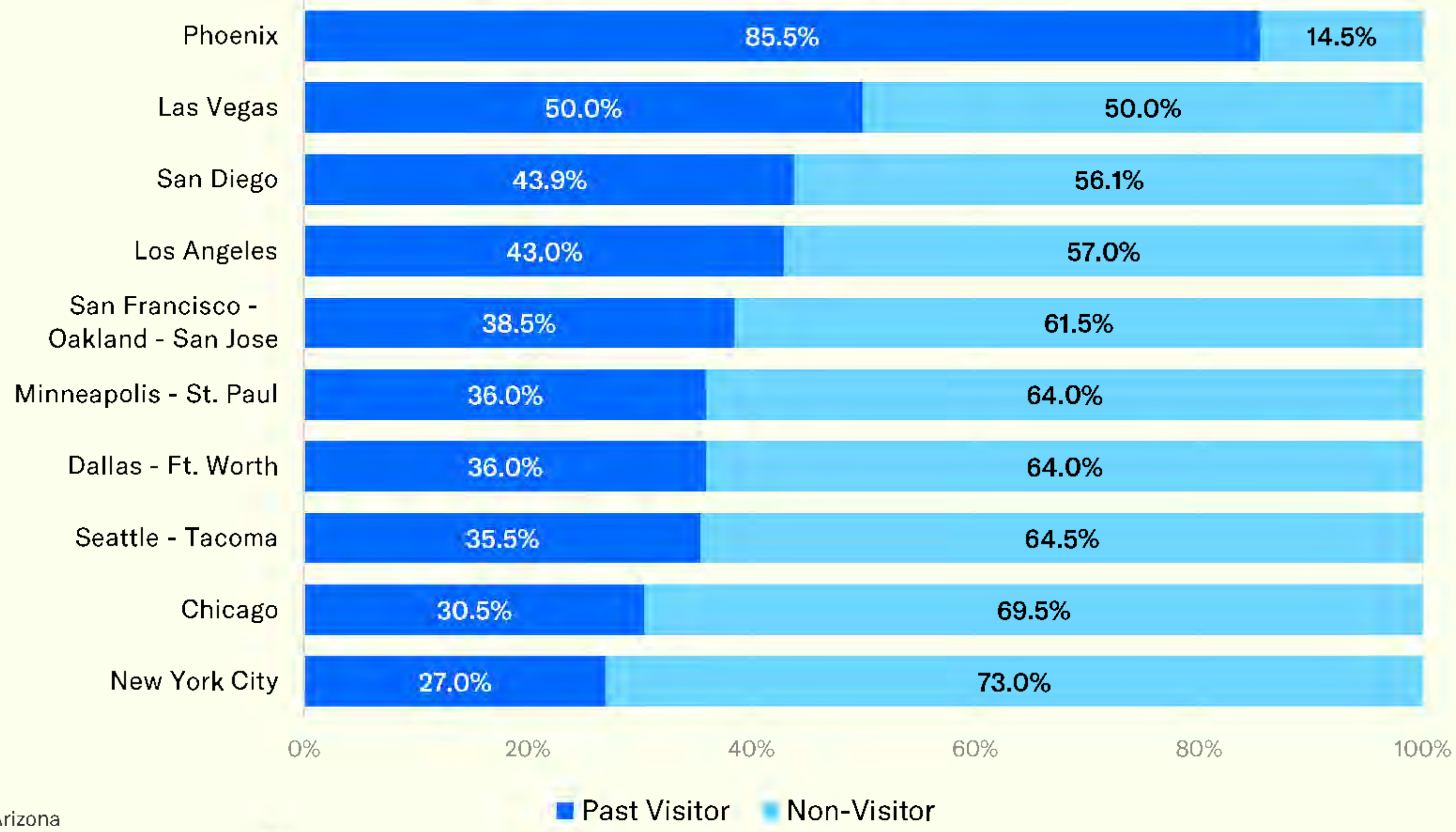
Across markets, Phoenix unsurprisingly boasts the highest proportion of Sedona visitors at 85.5%, followed by Las Vegas (50%) and the California markets. Potentially due to being the farthest away, about 3 in 4 New Yorkers have not visited Sedona as adults, presenting a large untapped market. Chicagoans are also significantly less likely than the overall sample to have visited Sedona, at a rate of 30.5%.

Past Visitation, Overall Sample



* Day Tripper – 21.4%
Overnight Visitor – 21.7%

Past Visitation, by Market



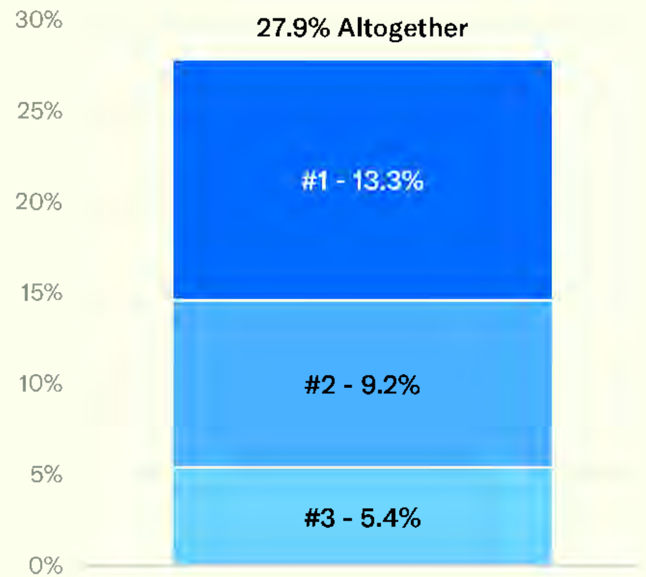
Question: Have you ever visited the following cities as an adult (that is, after age 18)? – Sedona, Arizona
Base: Total respondents. 1,998 completed surveys. Per market: 200 respondents for every market except San Diego, where n = 198.

About one quarter (26%) of the target market population is highly familiar with Sedona; Las Vegas is the top out-of-state market

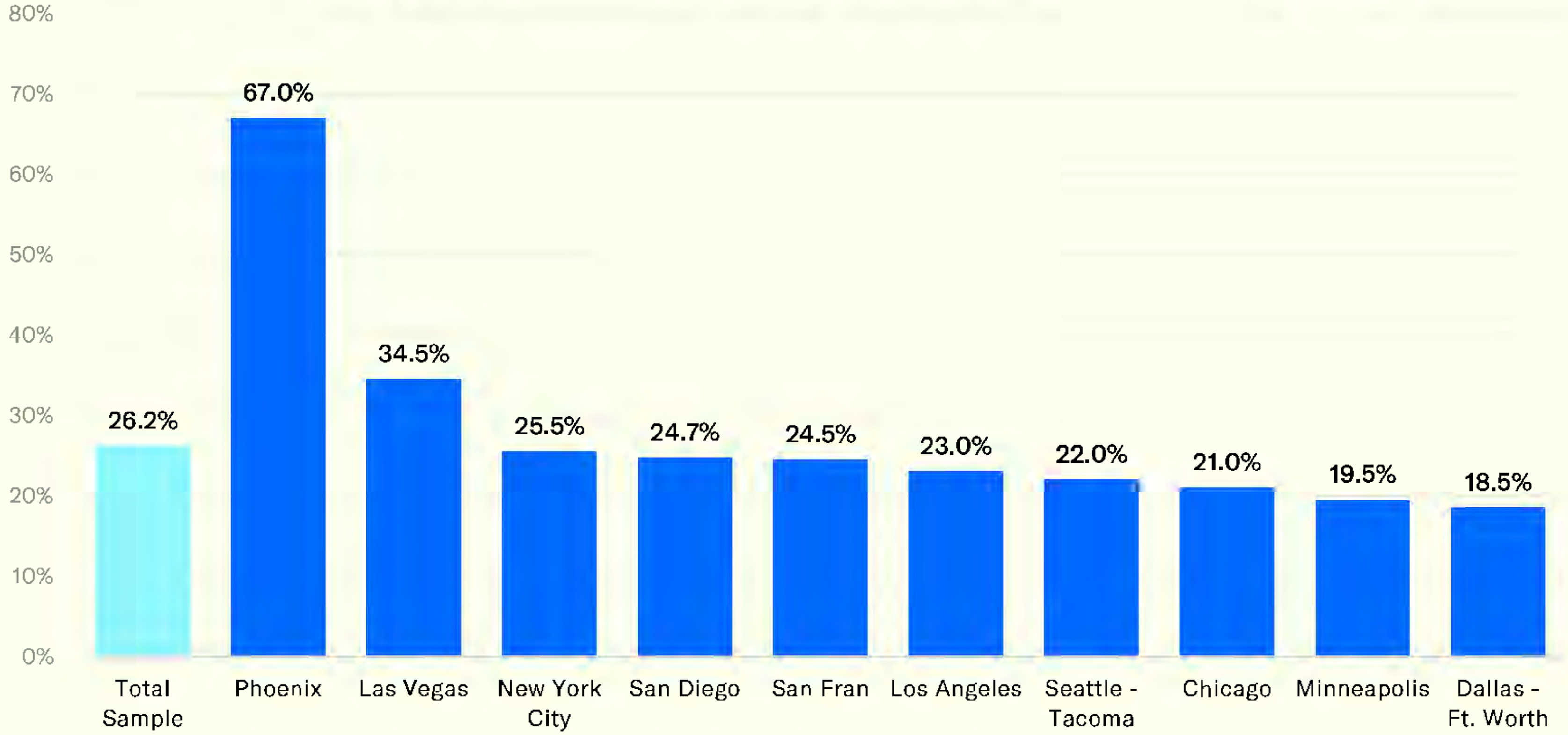
Unaided awareness within the sample was indirectly measured by whether Sedona was a top-of-mind, desirable destination. The level of awareness is comparable to metrics for high familiarity, with 27.9% of respondents naming Sedona as a top-three Arizona destination they want to visit. Further, it was most commonly ranked as their #1 top choice (~48% of respondents who named it, representing 13.3% of overall sample).

Unaided Awareness / Appeal[1]

Q: What are the top three destinations within Arizona you most want to visit in the next five years?[2]



Familiarity with Sedona, by Market: % Very or Extremely Familiar

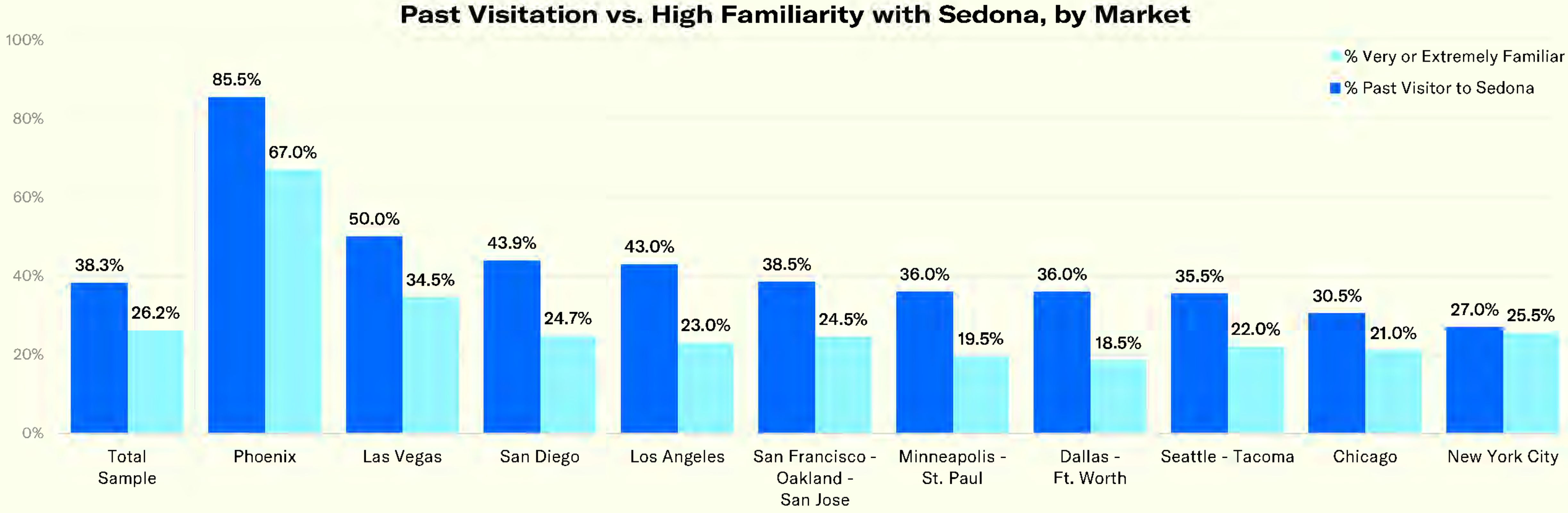


[1]Note: Bar segments represent raw, unweighted percentages of sample respondents. [2]Open-ended question.
Base: Total respondents. 1,998 completed surveys.

Question: How familiar are you with each of the following cities? Familiarity can include knowing about the city, even if you have not visited. – Sedona, Arizona. *Columns represent % selecting "very" or "extremely familiar"*
Base: Total respondents. 1,998 completed surveys. Per market: 200 respondents for every market except San Diego, where n = 198.

While nearly 4 in 10 (38.3%) of target market travelers have visited Sedona, only 26.2% consider themselves highly familiar with it

The notable differences between past visitation rates and familiarity levels, with a gap of 13 - 20 percentage points in all but two markets, could indicate that the experiences of many past visitors may not have generated strong, distinctive memories, or that familiarity with Sedona is influenced by factors beyond personal visitation, such as media portrayals or cultural references and associations. The finding suggests further research is needed to understand past visitor experiences. What might cause someone to visit Sedona but not remember as much about it? Understanding the reasons behind this gap could be valuable for informing future marketing efforts, deepening the visitor's relationship with Sedona, and increasing repeat visits.

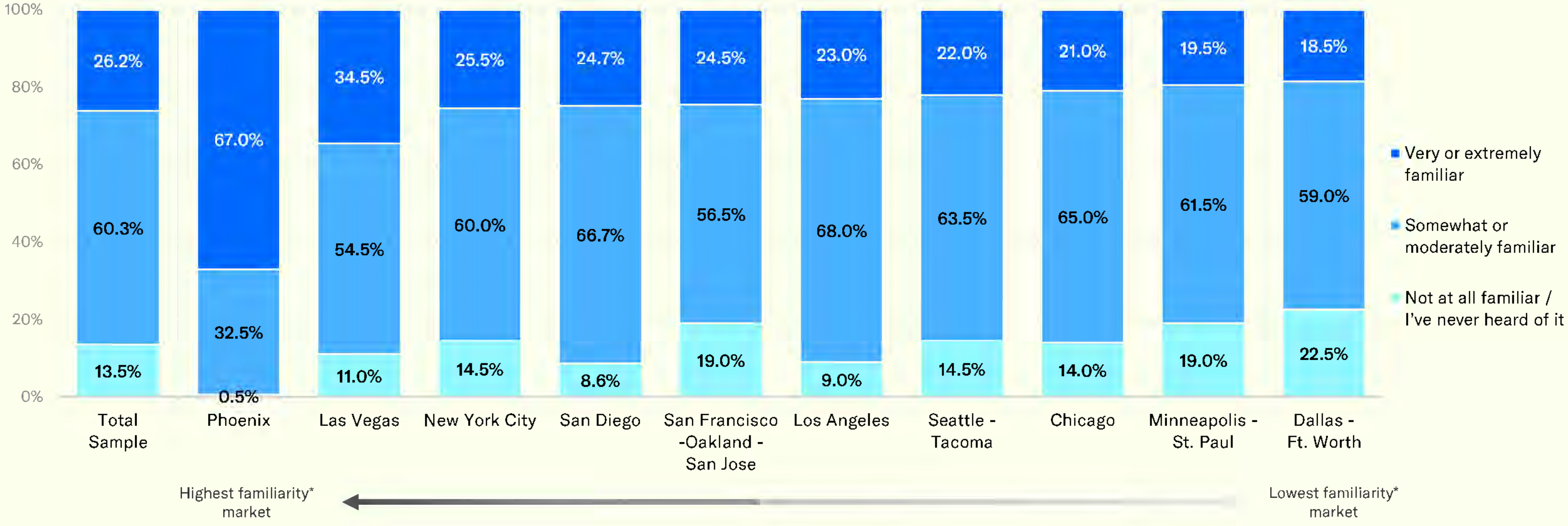


Questions: Have you ever visited the following cities as an adult (that is, after age 18)? – Sedona, Arizona / How familiar are you with each of the following cities? Familiarity can include knowing about the city, even if you have not visited. – Sedona, Arizona. *Dark blue columns represent % selecting "Yes, on a day trip" or "yes overnight." Light blue columns represent those indicating they are "very" or "extremely familiar" with Sedona.*
Base: Total respondents. 1,998 completed surveys. Per market: 200 respondents for every market except San Diego, where n = 198.

In terms of overall awareness, while 19-26% of travelers in the vast majority of markets are highly familiar, about 1 in 7 (13.5%) report being not at all familiar or never having heard of Sedona

Well over half of target travelers in out-of-state (i.e., non-Phoenix) markets are somewhat or moderately familiar with Sedona. The least familiar markets are Dallas-Ft. Worth, with nearly a quarter (22.5%) reporting no familiarity, and Minneapolis-St. Paul, with roughly 1 in 5 (19.0%) reporting the same.

Familiarity with Sedona, by Market

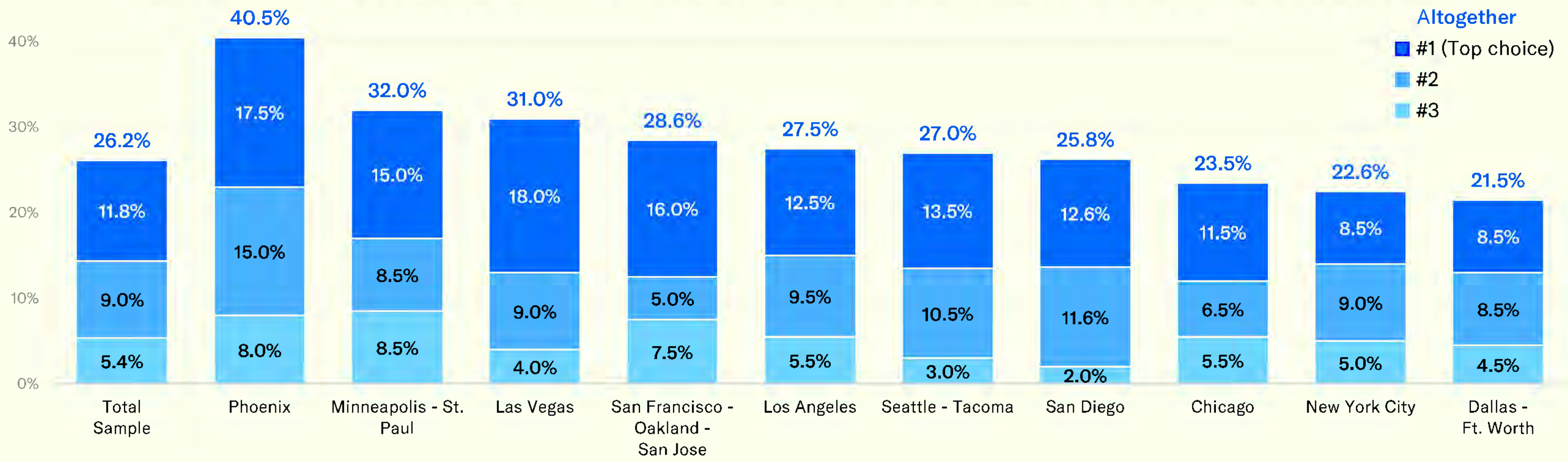


Question: How familiar are you with each of the following cities? Familiarity can include knowing about the city, even if you have not visited. – Sedona, Arizona. *Column segments represent % selecting option indicated in chart legend.*
Base: Total respondents. 1,998 completed surveys. Per market: 200 respondents for every market except San Diego, where n = 198.
*Level of familiarity defined by % of the market rating themselves as "very" or "extremely" familiar with Sedona

A deeper dive into free response data shows Minneapolis rising to the 2nd spot, after Phoenix, in terms of desire to visit Sedona

Overall, the open-ended naming of Sedona as a highly desired Arizona destination is promising, considering that the sample consists exclusively of travelers who have been to (and thus may likely revisit) or are interested in visiting the state. Travelers from Las Vegas were the most likely to list Sedona as their #1 choice for an Arizona destination. Still, Minneapolitans named Sedona at the highest out-of-state rate, notable given that Minneapolis is the least familiar market with Sedona and reports the lowest interest & intent to visit among those surveyed. This suggests further research could be helpful to fully understand the appeal of Sedona for Minneapolitans. Regardless of lower awareness, Sedona's high ranking as a desirable destination highlights a potential opportunity for targeted marketing efforts to increase familiarity and consideration among this audience.

Free Response: Sedona as a Top-3 Most Desired Arizona Destination to Visit in the Next 5 Years



Q: What are the top three destinations within Arizona you most want to visit in the next five years? (Open-ended question) *Column segments represent % of respondents in the sample / market naming Sedona as their #1, #2, or #3 top Arizona destination. Market samples are weighted for age/generation distribution, while the total sample is weighted by market size.*
Base: Total respondents. 1,998 completed surveys.

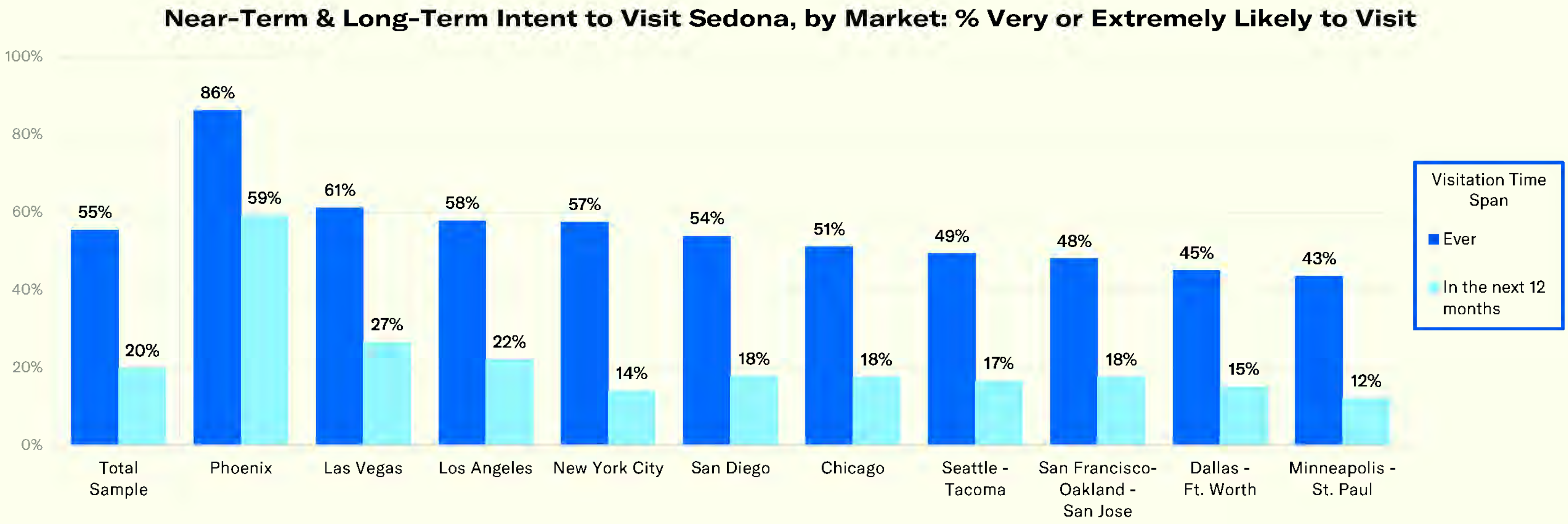
Nearly half of traveler respondents are highly interested in visiting Sedona; this proportion rises to over 50% for those from Phoenix, NYC, Las Vegas, and LA

The least interested markets are San Diego, Minneapolis, and Seattle markets. However, Seattleites show a higher rate of “extreme” interest (22.5%) than five other markets, especially San Diego (15.7%) and Minneapolis (17%). Overall, across all markets, at least 4 in 10 travelers express strong interest in visiting Sedona, a positive sign for potential conversion.

Question: How interested are you in visiting each of the following cities in the next 3 years? – Sedona, Arizona. *Column segments represent % selecting response option indicated in chart legend.*
Base: Total respondents. 1,998 completed surveys. Per market: 200 respondents for every market except San Diego, where n = 198.
*Level of interest defined by % of the market rating themselves as “very” or “extremely” interested in Sedona

Most travelers from Chicago, San Diego, New York City, Las Vegas, Los Angeles, and Phoenix intend to visit Sedona at some point – but only Phoenicians are highly likely to visit in the next 12 months

New Yorkers demonstrate the largest gap between reported likelihood to ever visit Sedona and likelihood to visit in the next year – while they are the 4th market (out of 10) most reportedly likely to visit Sedona in the general future, they are the 9th market when examining likelihood to visit in the next 12 months.

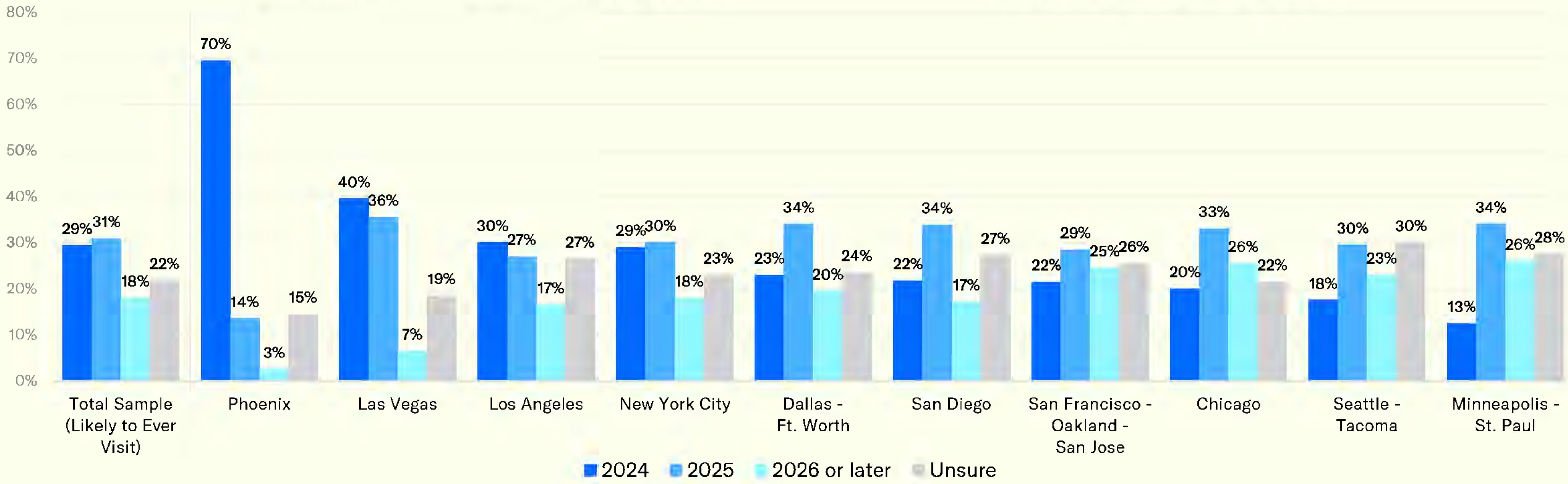


Question: How likely are you to visit Sedona, Arizona… *Columns represent % of sample / market selecting.*
Base: Total respondents. 1,998 completed surveys. Per market: 200 respondents for every market except San Diego, where n = 198.

Most (60%) who are likely to visit Sedona plan to do so within the next two years; near-term intentions are high in regional markets

Travelers report a range of visit intentions to Sedona, with notable immediate interest for 2024 (29% of the sample), particularly and overwhelmingly from the Phoenix market (70%). Las Vegas mirrors this higher near-term intent, while large cities like New York and Chicago indicate a broader potential visit timeline with notable indecision. This uncertainty can be strategically engaged to solidify visitation plans. Interest extending into 2025 and beyond highlights Sedona's lasting appeal, suggesting a need to both foster immediate visits and nurture future aspirations.

Potential Timing of a Sedona Visit Among Likely Visitors, Overall and by Market



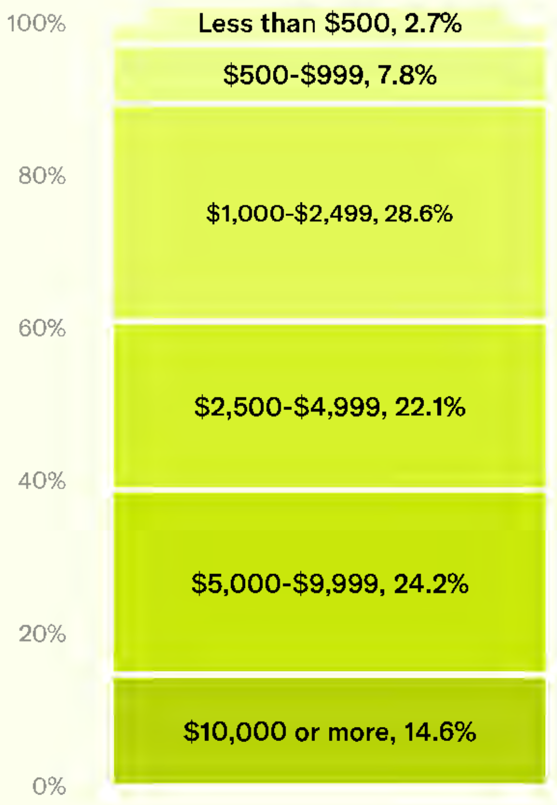
Question: When would you be MOST LIKELY to visit Sedona, Arizona for leisure? (Select one.) *Columns represent % of market selecting date range indicated in chart legend.*
Base: Respondents indicating likelihood to ever visit Sedona. 1,879 completed surveys. Per market: Total Respondents; 200 respondents for every market except San Diego, where n = 198.

Traveler Characteristics

Roughly 4 in 10 of respondents have travel budgets of over $5,000 planned for the next year; only 10.5% plan to spend less than $1,000

Past Sedona visitors and likely future visitors to Sedona are more likely to have higher travel budgets and report higher average travel budgets than the total sample and non-visitors, though non-visitors who are highly interested in visiting Sedona have higher travel budgets than non-visitors in general. Findings suggests that Sedona attracts travelers who are more willing and/or more able to commit more resources toward their travels.

Next 12 Month Travel Budget



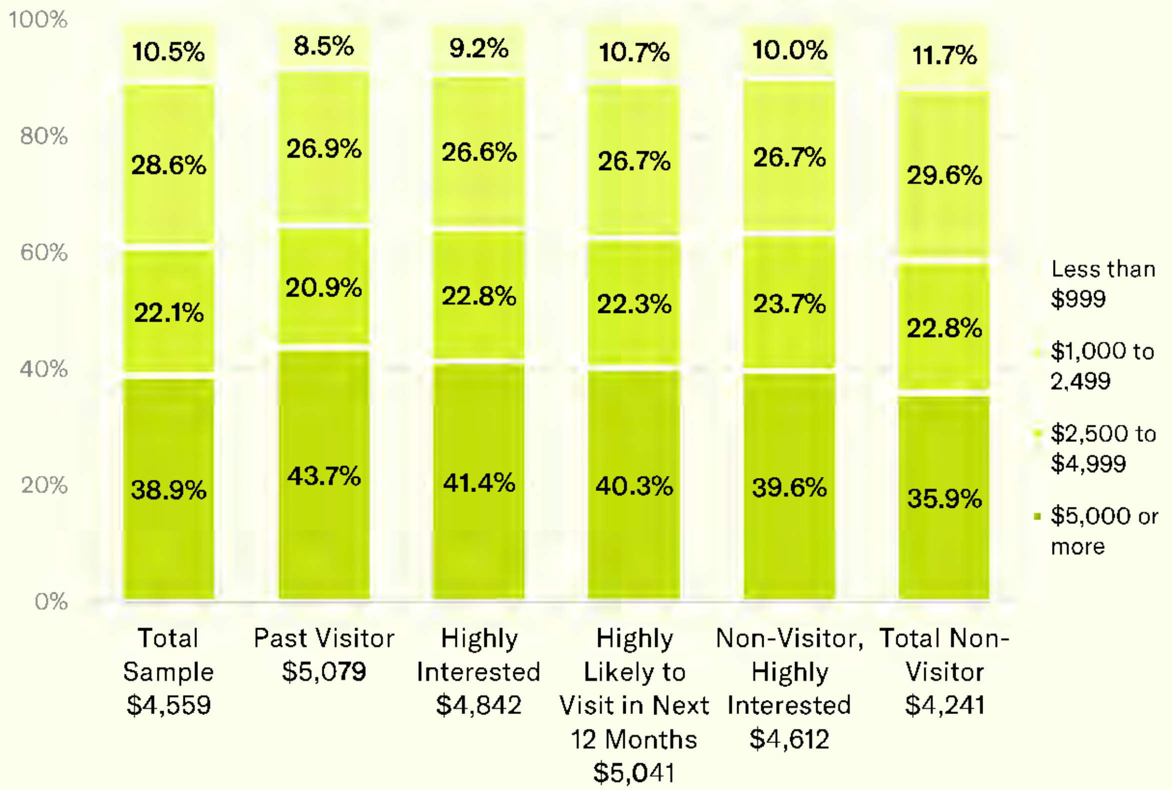
$4,559

Average Travel Budget

Highest-Budget Markets

Market	% $5K+	Average
San Francisco - Oakland - San Jose	43.6%	$ 5,083
Seattle - Tacoma	43.5%	$ 5,037
New York City	40.7%	$ 4,755
San Diego	40.9%	$ 4,658

By Likely Visitor Groups



Question: How much in total is the maximum you will spend on leisure travel (including airfare, accommodations, and all other trip-related spending) during the next 12 months?
Column segments represent % of sample / group responding within the range.
Base: Total respondents. 1,998 completed surveys. Per market: 200 respondents for every market except San Diego, where n = 198.

Travelers' top travel-related self-perceptions reveal a strong penchant for novelty-seeking

Travelers almost universally agree that "I enjoy trying new things, such as foods, experiences, and activities when traveling" at a rate of 87.6%, and the next most endorsed psychographic statements asked about are about "discover[ing] local favorites and secret locations" (81.8%) and "travel[ing] to open my mind to new cultures and experiences" (79.1%). All three statements reflect novelty and discovery, followed in frequency by self-identifiers that involve being outside – "connecting with nature" (72.1%) or seeking adventures (64.4%).

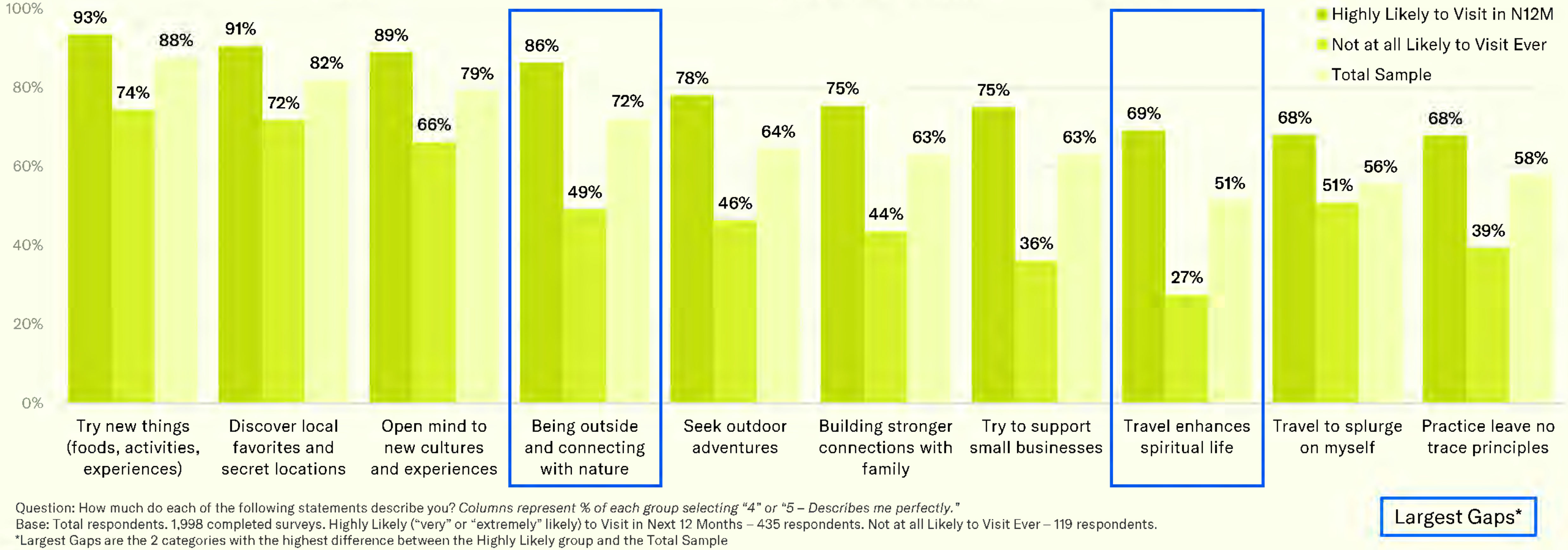
Psychographic Measures – Agreement with Travel-Related Sentiments

Question: How much do each of the following statements describe you? *Bars represent % selecting "4" or "5 – Describes me perfectly."*
Base: Total respondents. 1,998 completed surveys.

Likely near-term visitors value connection with nature & spirituality more, standing out particularly from those unlikely to ever visit

To identify distinguishing characteristics of what attracts visitors to Sedona, an analysis compared top self-descriptors among respondents highly likely to visit in the next year against the overall sample + those not at all likely to visit *ever*. The largest gaps were found in "Being outside and connecting with nature motivates me to travel" (86% of likely visitors self-identifying vs. 72% overall and 49% of never-likely) & "Travel enhances my spiritual life" (69% of likely visitors vs. 51% and 27%, respectively). This aligns with Sedona's distinctive offering of natural beauty blended with spiritual enrichment, which resonates with those seeking meaningful connections with nature on their travels.

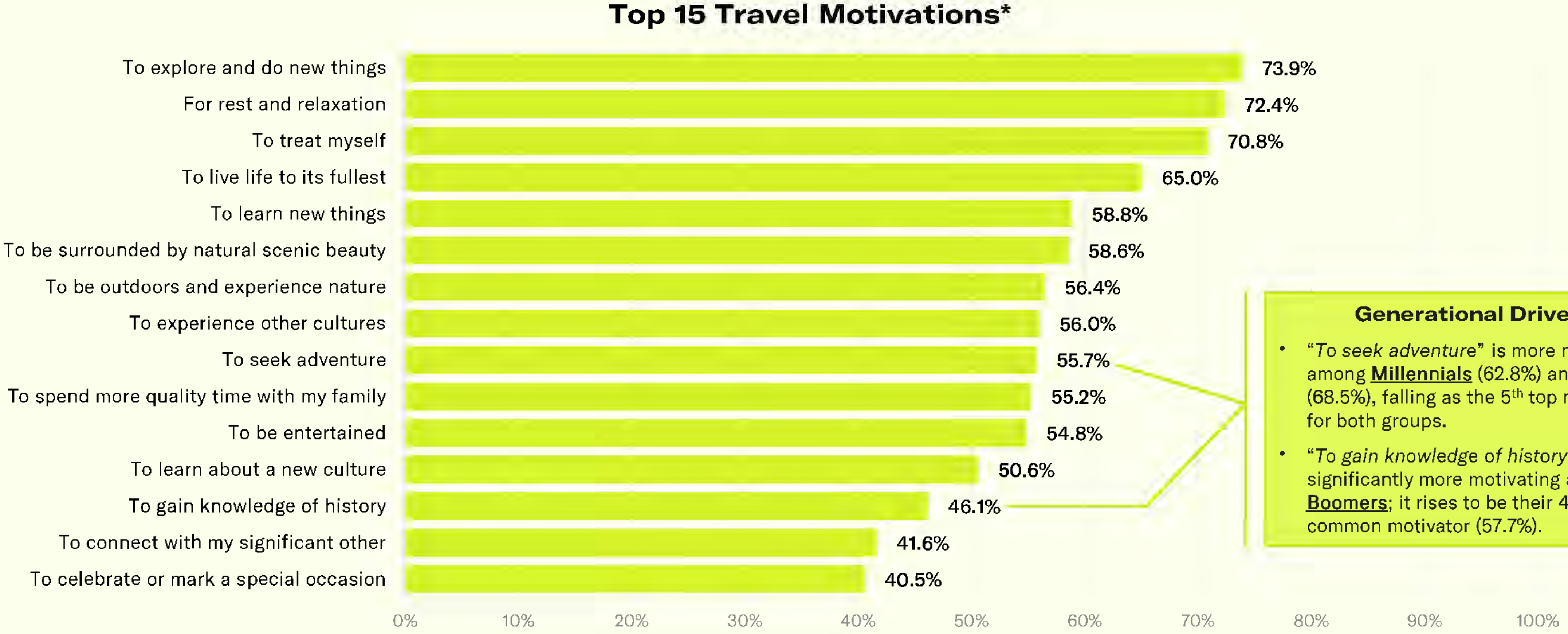
Top 10 Psychographics Among Likely Next-12-Month Visitors, Gap Analysis



Question: How much do each of the following statements describe you? *Columns represent % of each group selecting "4" or "5 – Describes me perfectly."*
Base: Total respondents. 1,998 completed surveys. Highly Likely ("very" or "extremely" likely) to Visit in Next 12 Months – 435 respondents. Not at all Likely to Visit Ever – 119 respondents.
*Largest Gaps are the 2 categories with the highest difference between the Highly Likely group and the Total Sample

Travel motivations are rooted in exploration, leisure, and self-care

Among common reasons why people travel, the quest to "explore and do new things" leads, with nearly 3 in 4 respondents identifying it as a driver, while "rest and relaxation" follows closely (72.4%). Self-reward is also a prominent theme: Over 70% of respondents travel "to treat myself." Generational trends reveal that Boomers have a markedly higher interest in "gaining knowledge of history," while Millennials and Gen Z prioritize "adventure." Targeted marketing strategies can cater to the diverse desires of different age cohorts, offering itineraries that showcase two contradictory, coexisting facets of Sedona's authentic identity: its deep-rooted history and its dynamism.



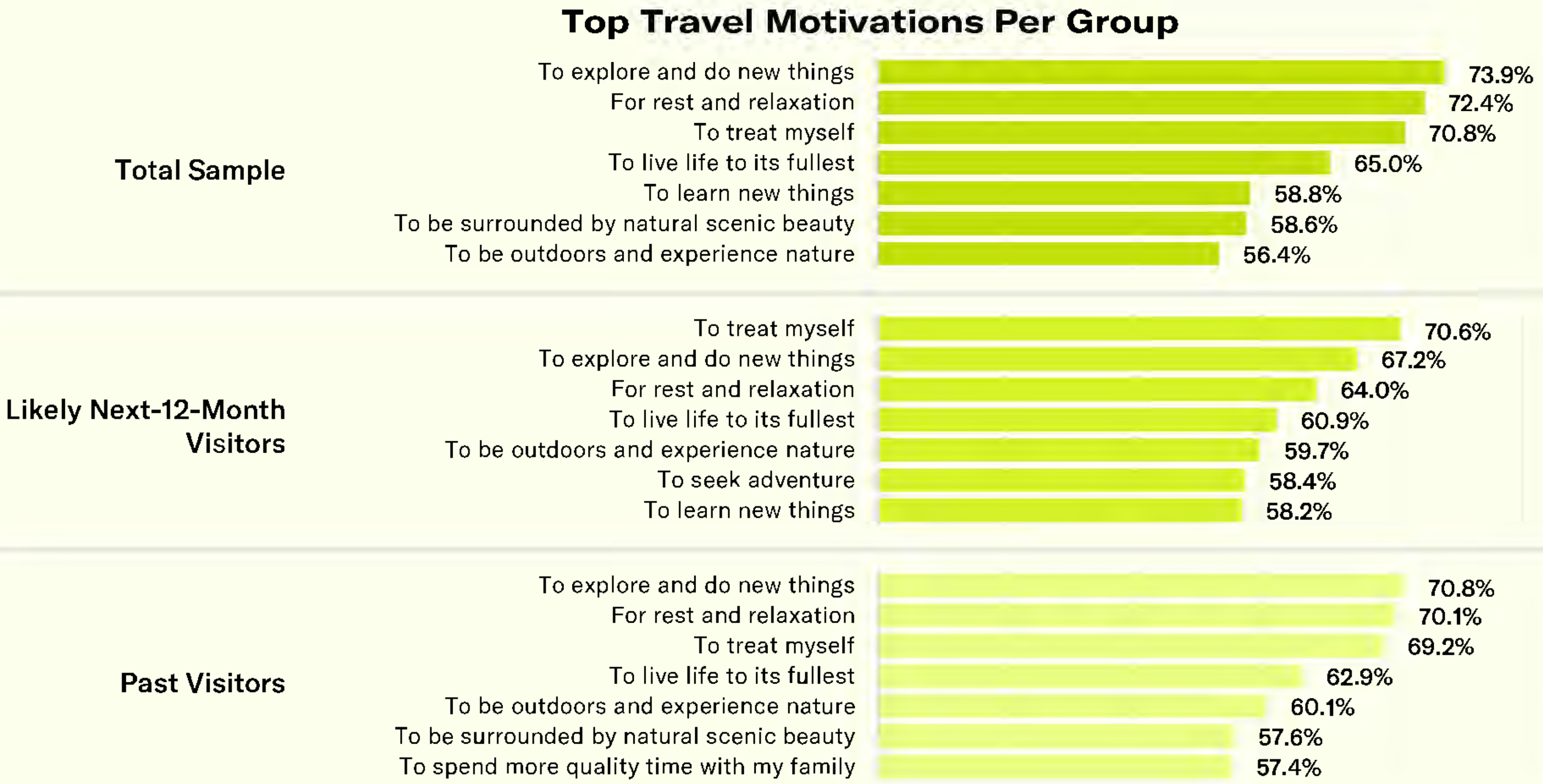
Generational Drivers

- "*To seek adventure*" is more motivating among **Millennials** (62.8%) and **Gen Z** (68.5%), falling as the 5th top motivator for both groups.
- "*To gain knowledge of history*" is significantly more motivating among **Boomers**; it rises to be their 4th most common motivator (57.7%).

Question: Which of the following reasons motivates you to travel? (Select all that apply.) *Bars represent % selecting the reason.*
Base: Total respondents. 1,998 completed surveys.
*Top 15 out of 23 asked about.

Top travel motivators are generally similar between the overall sample, past visitors, and likely near-term visitors

The top 4 motivators ("explore & do new things"; "rest & relaxation"; "treat myself"; and "live life to its fullest") are consistent across the board, endorsed by 60-74% of each of these groups of interest. However, "to seek adventure" rises as a top motivator for those highly likely to visit in the next 12 months (58.4%) but is not in the top 7 among the other two groups. Similarly, "to spend more quality time with family" is seen among top motivators for past visitors (57.4%) but not among the other groups.



Motivational Insight

The primary motivations of likely near-term visitors can be found in the chart to the left – but additionally, compared to others, these visitors are more motivated in travel to:

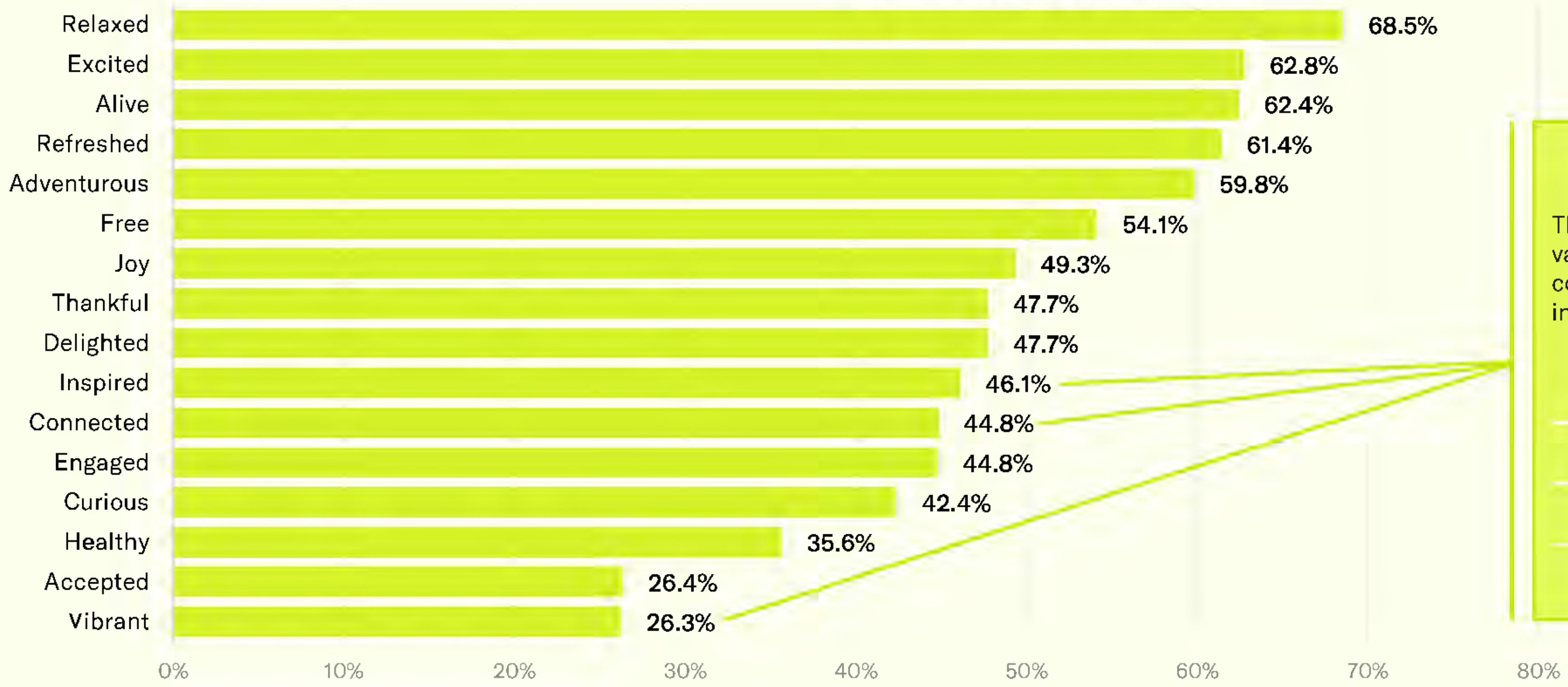
- provide **life experiences** for their **children** (33%, vs. 24% of total sample)
- have a **spiritual** experience (32%, vs. 19% of total sample)
- be the **first among their friends** to do something (18%, vs. 10% of total sample)

Question: Which of the following reasons motivates you to travel? (Select all that apply.) *Bars represent % of group selecting the reason.*
Base: Total respondents. 1,998 completed surveys. Highly Likely to Visit in Next 12 Months – 435 respondents. Past Visitors – 851 respondents.

Vacationers crave emotions of relaxation, excitement, and connection on their travels

The top emotional states that travelers desire on vacation are “relaxed” (endorsed by 69% of respondents), “excited” (63%), and “alive” (62%). Notably, those highly likely to visit Sedona are inclined towards feeling “inspired,” “connected,” and “vibrant,” significantly more than those with no intention to visit. This reveals Sedona's potential to fulfill deeper emotional aspirations for its visitors, suggesting that marketing efforts can emphasize the enriching and soul-stirring experiences unique to the destination. The data underscores the opportunity for Sedona to position itself as a place not just of scenic beauty, but also of personal transformation and rejuvenation.

Top 16 Desired Vacation Feelings*



Significant Differences by Sedona Visitation Likelihood

Those highly likely to visit Sedona share the same top vacation feelings as the overall sample. When comparing potential visitors vs. unlikely visitors, interesting disparities emerge:

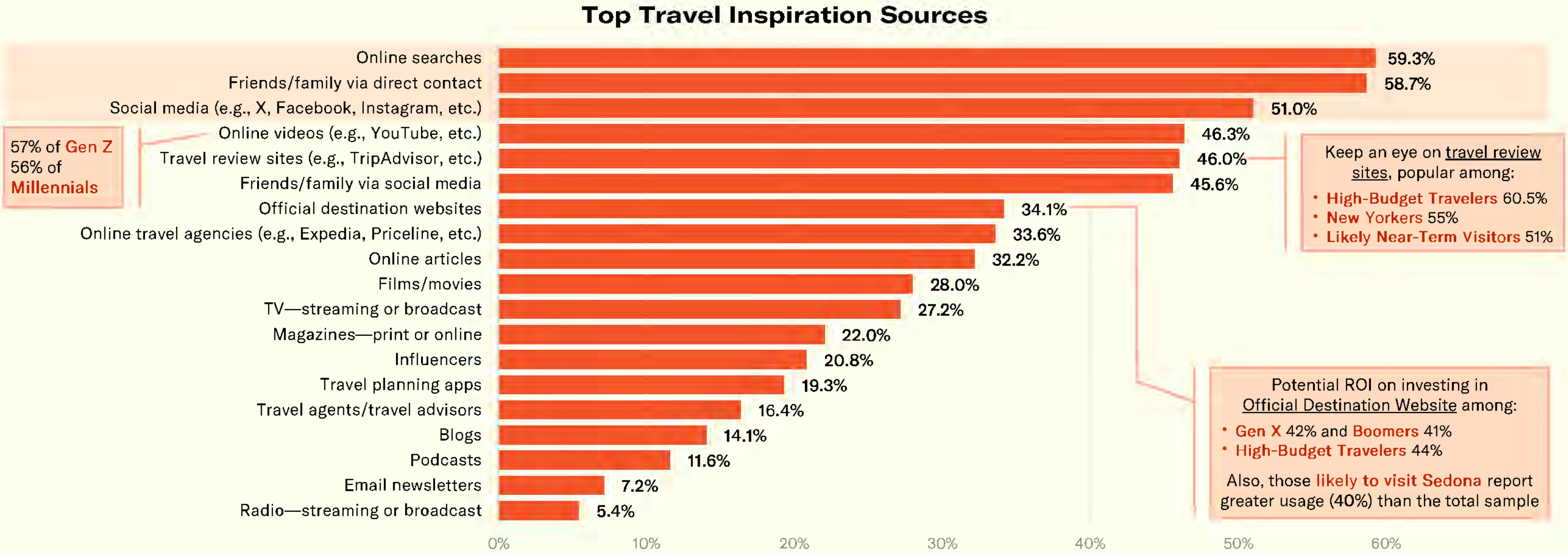
	Highly Likely Ever	Not at all Likely Ever
Inspired	49.0% ↑	34.9% ↓
Connected	49.9% ↑	24.1% ↓
Vibrant	28.8% ↑	12.4% ↓

Question: How do you want to feel when you are on vacation? (Select all that apply.) *Bars represent % selecting the emotion.*
Base: Total respondents. 1,998 completed surveys. Highly Likely (“Very” or “Extremely Likely”) to Ever Visit Sedona – 1,101 respondents. Not at all Likely to Ever Visit Sedona – 119 respondents.
*Top 16 out of 24 asked about.

Reaching and Attracting Visitors

Digital Dominance: Online searches reign supreme as the top source of travel inspiration, leveraged by about 6 in 10 respondents

Friends/family via direct contact (as opposed to via social media) follows closely, used by 58.7%. Gen Z and Millennials exhibit a markedly stronger preference than others for online videos. Furthermore, high-budget travelers gravitate towards travel review sites (60.5%), alongside New Yorkers (55%) and likely near-term visitors (51%). Overall, these trends point to the extensive influence of digital platforms in shaping travel decisions across demographics. It is also important to acknowledge the enduring power of word-of-mouth, evidenced by the frequent use of friend and family recommendations as well as travel reviews among high-value groups.

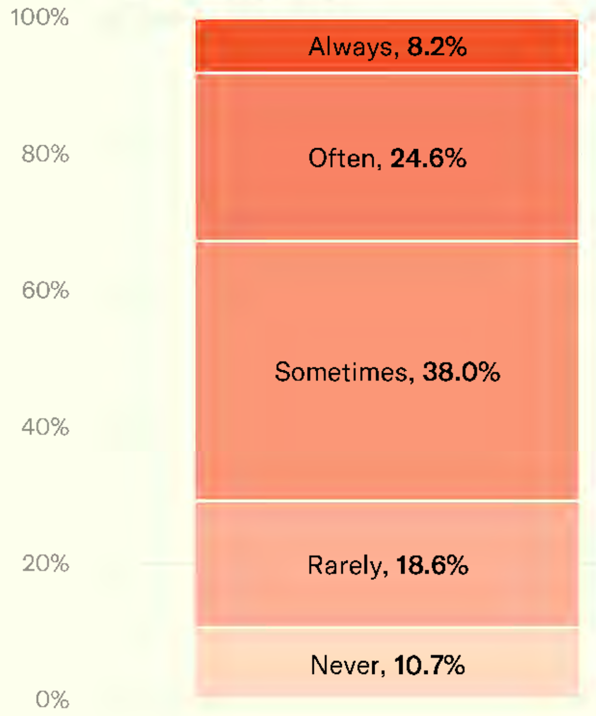


Question: Where do you look for travel inspiration? (Select all that apply.) *Bars represent % selecting the inspiration source.*
Base: Total respondents. 1,998 completed surveys.

Once at the destination, online research continues to dominate as the preferred resource for travel information, while Visitor's Centers are less utilized

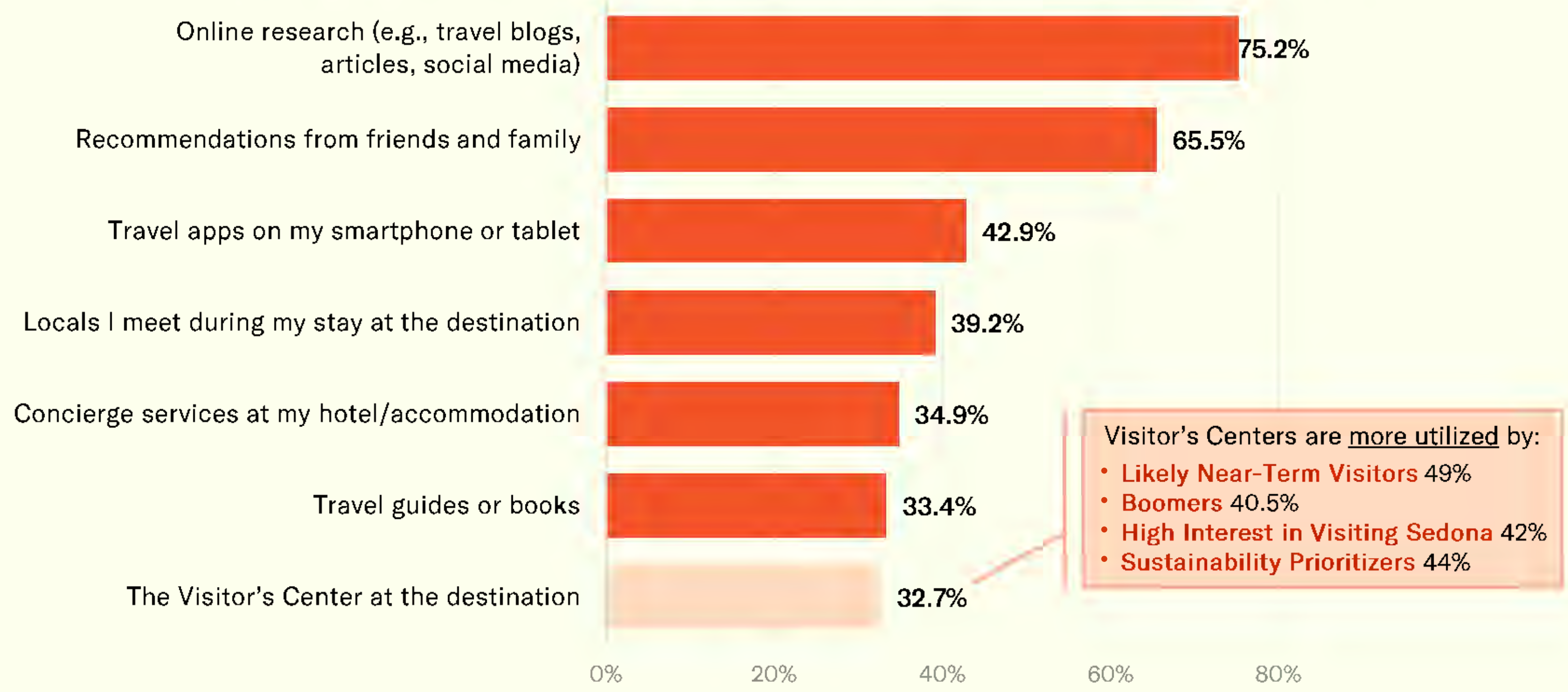
A deep dive into travelers' on-trip information-seeking preferences reveals an overwhelming influence of online research, capturing 75.2% of respondents when curating their itineraries at their destination. Notably, traditional resources like Visitor's Centers, while less universally utilized, may carve a niche appeal, especially among likely near-term visitors (49% of whom use it "always" or "often"), Baby Boomers (40.5%), those highly interested in visiting Sedona (42%), and sustainability prioritizers (44%).

Visitor's Center Utilization Frequency



Frequent Use of Resources for Activity and Attraction Information

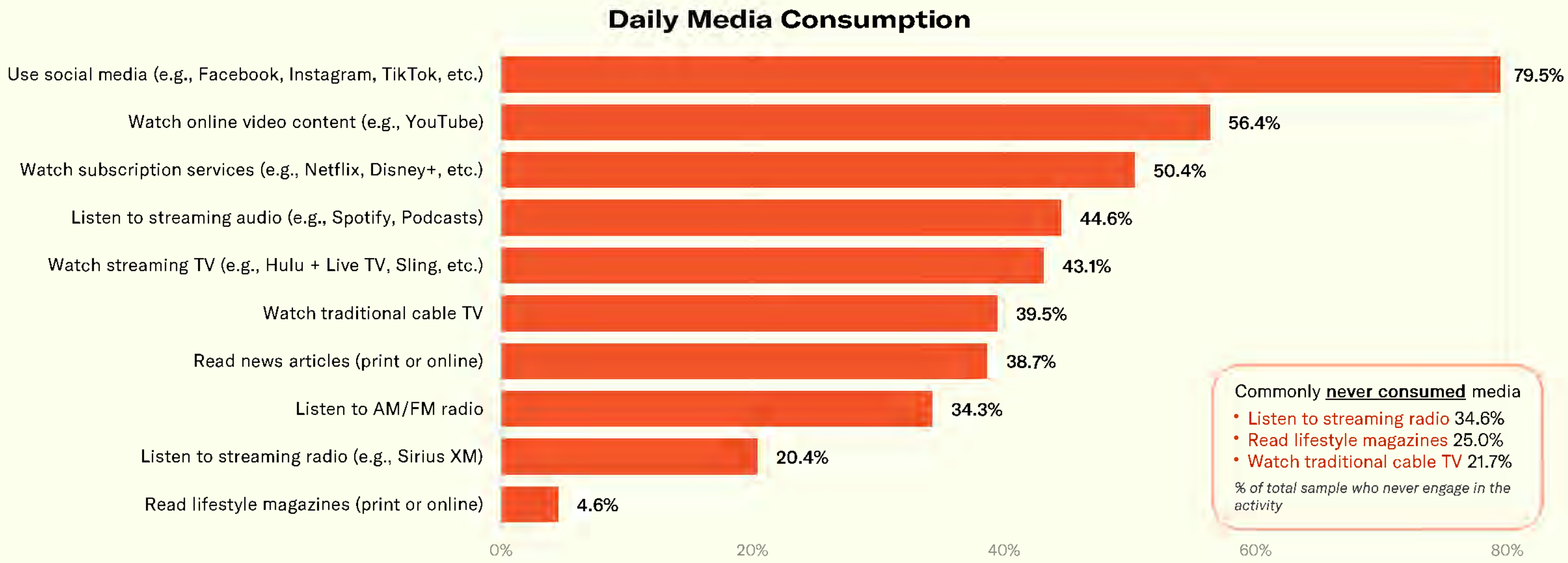
% using resource "often" or "always"



Question: When you travel and are looking for information about activities and attractions at your destination, how often do you use the following resources? *Left side: Column segments represent % selecting each frequency. Right side: Bars represent % selecting "often" or "always" for the resource.*
Base: Total respondents. 1,998 completed surveys.

Media consumption trends unveiled: Social media dominates daily routine, while use of traditional cable TV plateaus

Research underscores the overwhelming influence of social media, with 79.5% of respondents engaging platforms like Facebook, Instagram, & TikTok daily. Meanwhile, traditional cable TV is used daily by less than half of respondents (39.5%). This is counterbalanced by a higher daily use of streaming services, with 56.4% opting for online video content and 50.4% embracing subscription services like Netflix & Disney+. This data reflects the radical transformation in media consumption patterns, showcasing the flourishing, widespread daily use of digital platforms alongside a lack of engagement with traditional channels.



Commonly **never consumed** media

- Listen to streaming radio 34.6%
- Read lifestyle magazines 25.0%
- Watch traditional cable TV 21.7%

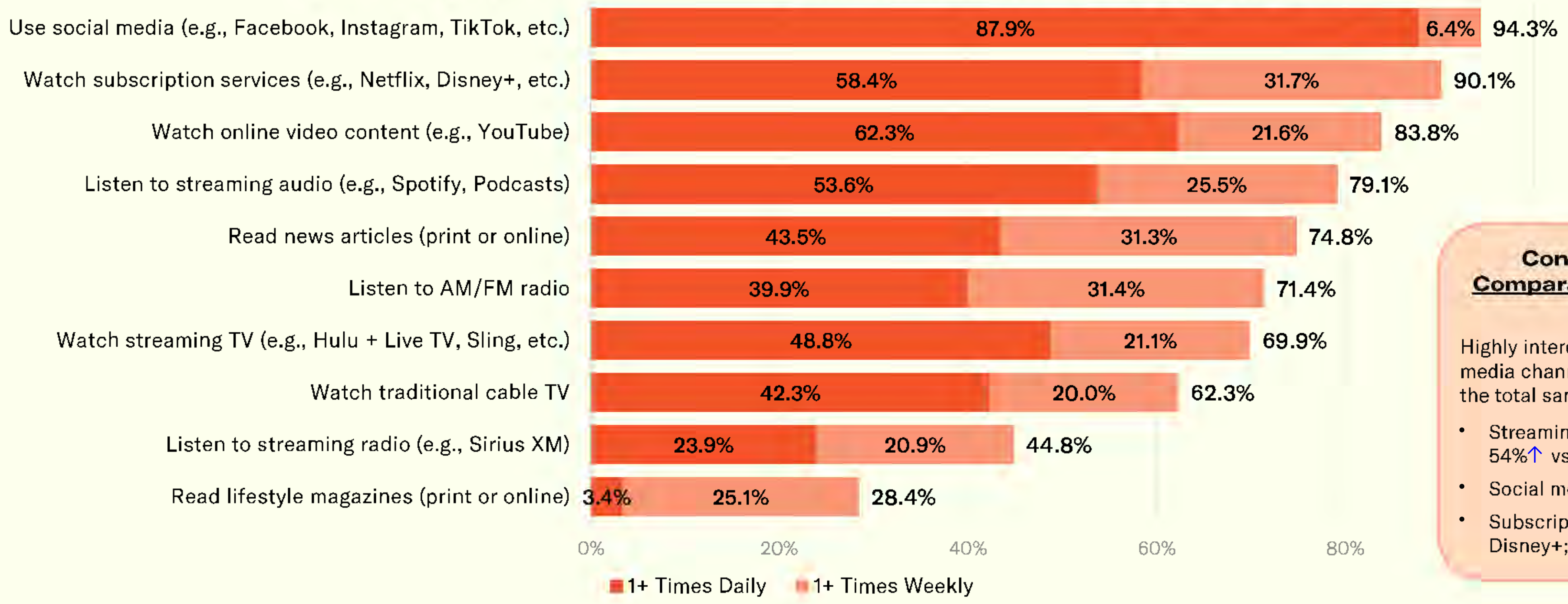
% of total sample who never engage in the activity

Question: How often do you do the following activities? *Bars represent % selecting "At least once a day."*
Base: Total respondents. 1,998 completed surveys.

Reaching convertible non-visitors: Social media and online video content outshine other media consumption habits

A staggering 94% of convertible non-visitors (individuals who have not visited Sedona as an adult but are "very" or "extremely interested" in visiting in the next 3 years) engage in social media at least once a week, while 90% regularly subscription services (e.g., Netflix). Online video content is used daily by 62% of these potential visitors (vs. 56% of total sample). The distinct media consumption patterns–demonstrating increased usage of streaming audio and subscription services–emphasize the importance of tailoring content to delivery channels to match specific audience preferences in order to engage effectively.

Frequent Media Consumption Among Potential Conversions (Highly Interested Non-Visitors)



Convertible Non-Visitors' Comparative Media Consumption Patterns

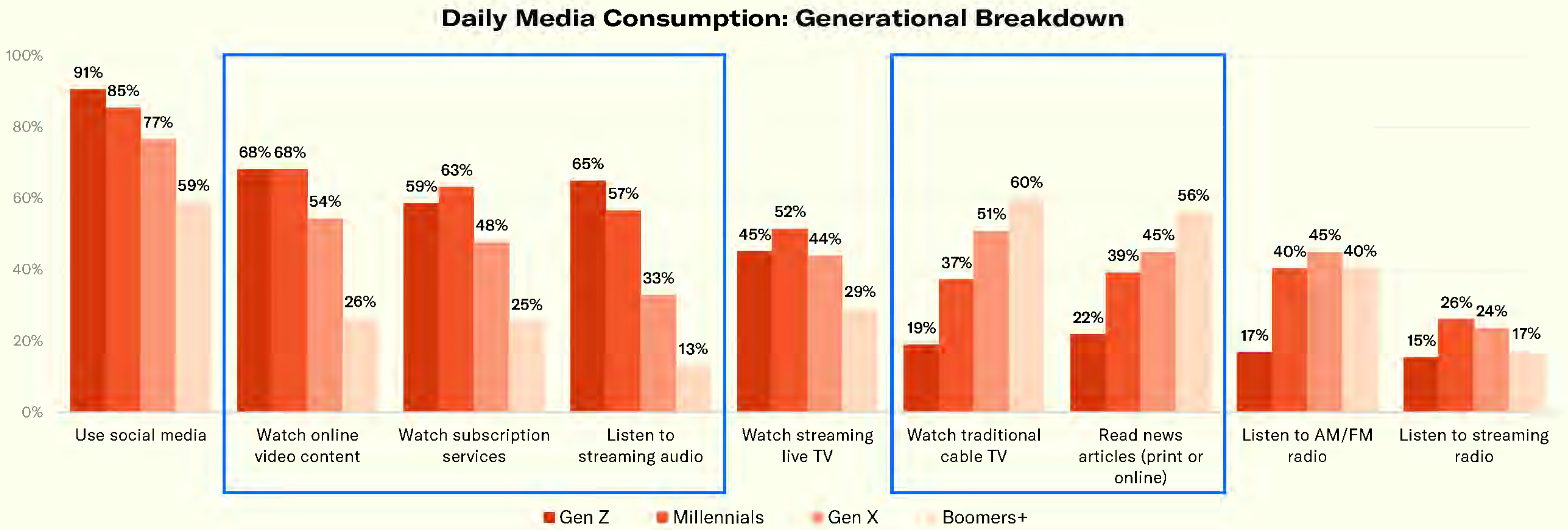
Highly interested non-visitors use 7 out of 10 media channels daily significantly more than the total sample; especially notable gaps are:

- Streaming audio (e.g., Spotify, podcasts; 54%↑ vs. 45%↓ total sample)
- Social media (88%↑ vs. 79%↓)
- Subscription services (e.g., Netflix, Disney+; 58%↑ vs. 50%↓)

Question: How often do you do the following activities? *Bar segments represent % selecting response option (frequency) indicated in chart legend.*
Base: Non-Visitors who are "very" or "extremely interested" in visiting Sedona in the next 3 years (High conversion-potential). 444 respondents.

Daily media consumption reveals distinct generational trends

Gen Z exhibits a strong preference for digital and social platforms, with a remarkable 91% using social media and 85% watching online video content daily, indicative of their digital-native status. Millennials, while also leaning heavily towards digital content, show a balanced media consumption that spans online videos (77%) and subscription services (63%). Gen X, bridging the gap between digital and traditional media, maintains a substantial presence across streaming services but still holds on to traditional cable TV (44%) slightly more than Millennials. Boomers+ demonstrate a clear preference for traditional media channels, as evidenced by their higher engagement with cable TV (52%) and print or online articles (51%), although their adoption of social media (59%) suggests a significant crossover into digital spaces.

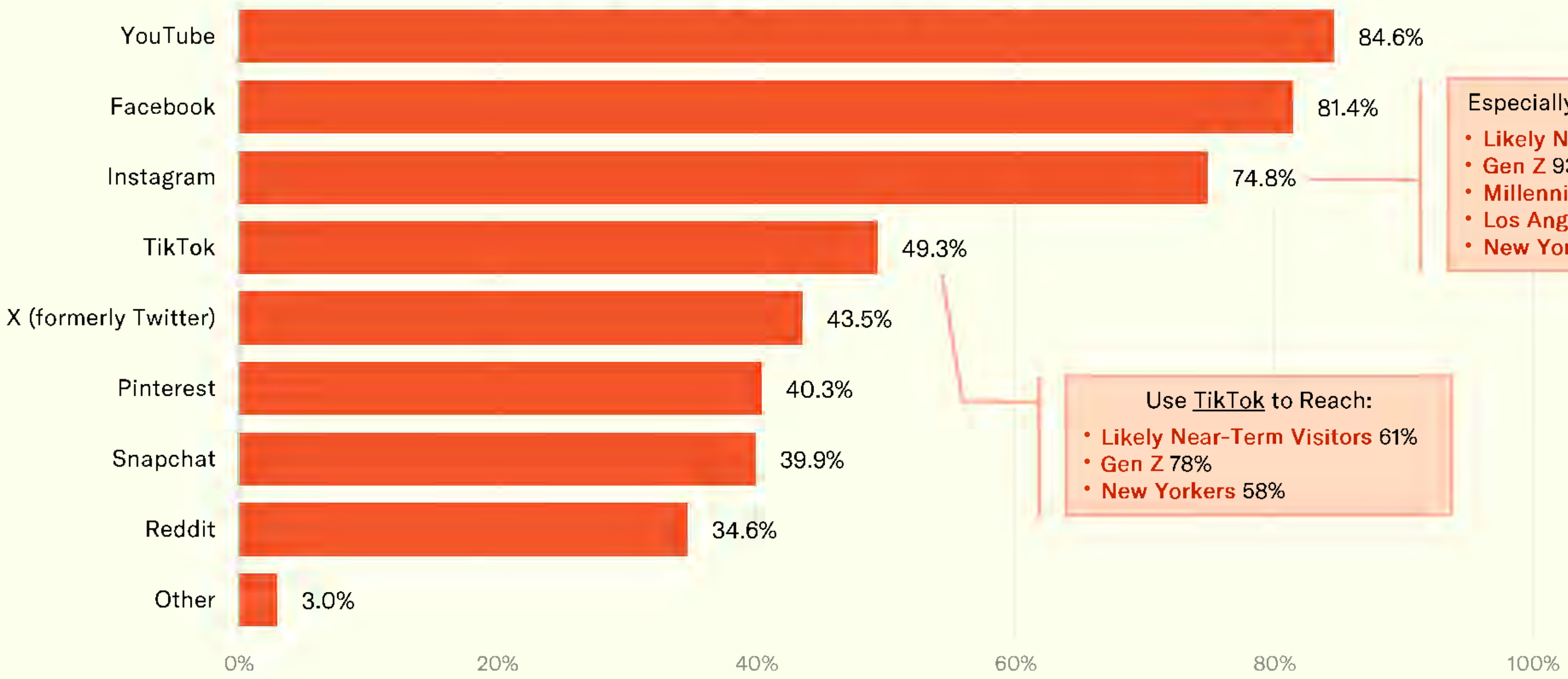


Question: How often do you do the following activities? *Columns represent % of group selecting "At least once a day" for each media-consuming activity.*
Base: Total respondents. 1,998 completed surveys.

YouTube and Facebook maintain their popularity amongst all, as TikTok and Instagram gain traction among Gen Z and Millennials

YouTube is the leading social media platform, with 84.6% of respondents using it daily, followed closely by Facebook (81.4%). Instagram also boasts popularity, with 3 in 4 respondents actively using the platform. Notably, TikTok captures the particular attention of Gen Z (78%), Black / African American travelers (64%), and likely near-term visitors (61%). Overall, the data highlights YouTube and Facebook's dominance, with TikTok and Instagram making notable strides among younger users and media-oriented cities (New York and LA), reflecting a dynamic social media landscape.

Social Media Platform Usage



Especially Present on Instagram:

- **Likely Near-Term Visitors** 81%
- **Gen Z** 93%
- **Millennials** 83%
- **Los Angeles residents** 81%
- **New Yorkers** 87%

Use TikTok to Reach:

- **Likely Near-Term Visitors** 61%
- **Gen Z** 78%
- **New Yorkers** 58%

Black / African American respondents were more likely than the total sample to use social media daily (87% vs. 79%) and also reported higher utilization of:

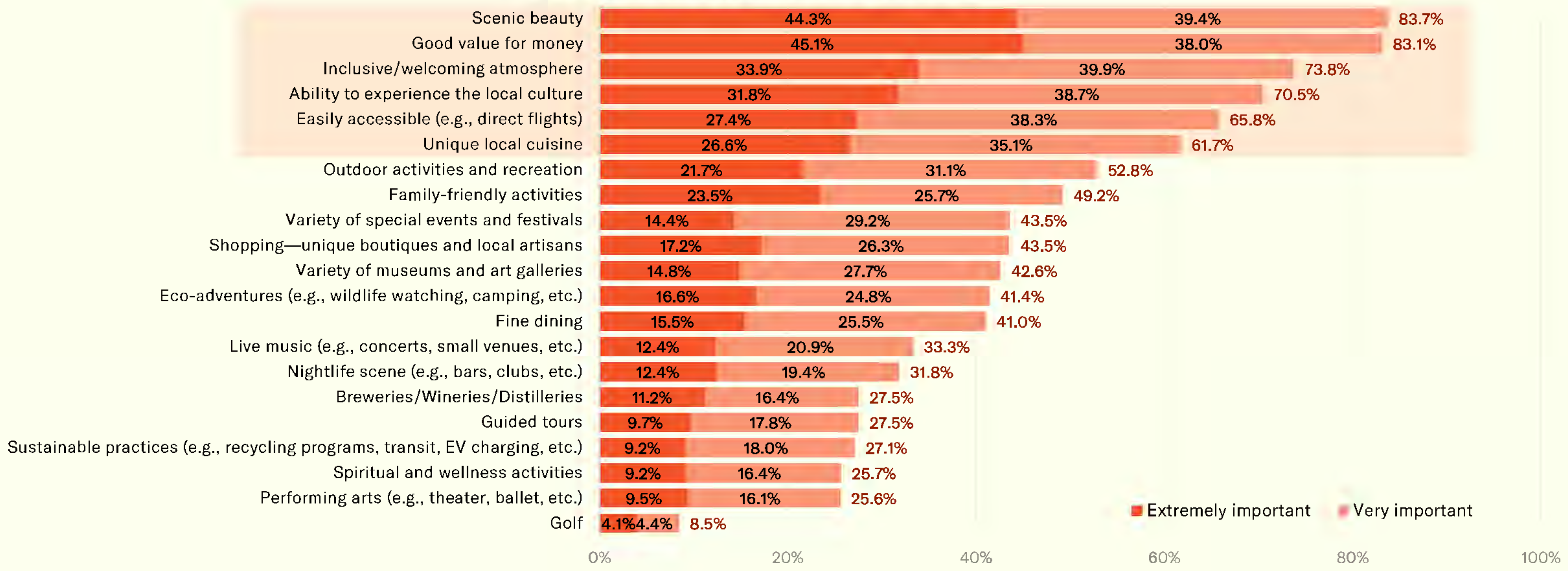
- **Youtube** 94%
- **Instagram** 87%
- **TikTok** 64%
- **X** 50%
- **Snapchat** 46%

Question: Which social media platforms do you use? (Select all that apply.) *Bars represent % selecting the platform.*
Base: Respondents who use social media. 1,910 completed surveys.

Scenic beauty and good value for money are the most influential factors for selecting vacation destinations

Scenic beauty emerged as the top high priority for 83.7% of participants, closely followed by good value for money at 83.1%; the latter was more frequently reported to be "extremely important." These findings highlight the significance of natural landscapes and affordability in travelers' decision-making process. Meanwhile, factors such as an inclusive/welcoming atmosphere, the ability to experience the local culture, and ease of accessing the destination also scored high in importance.

Destination Attribute Priorities

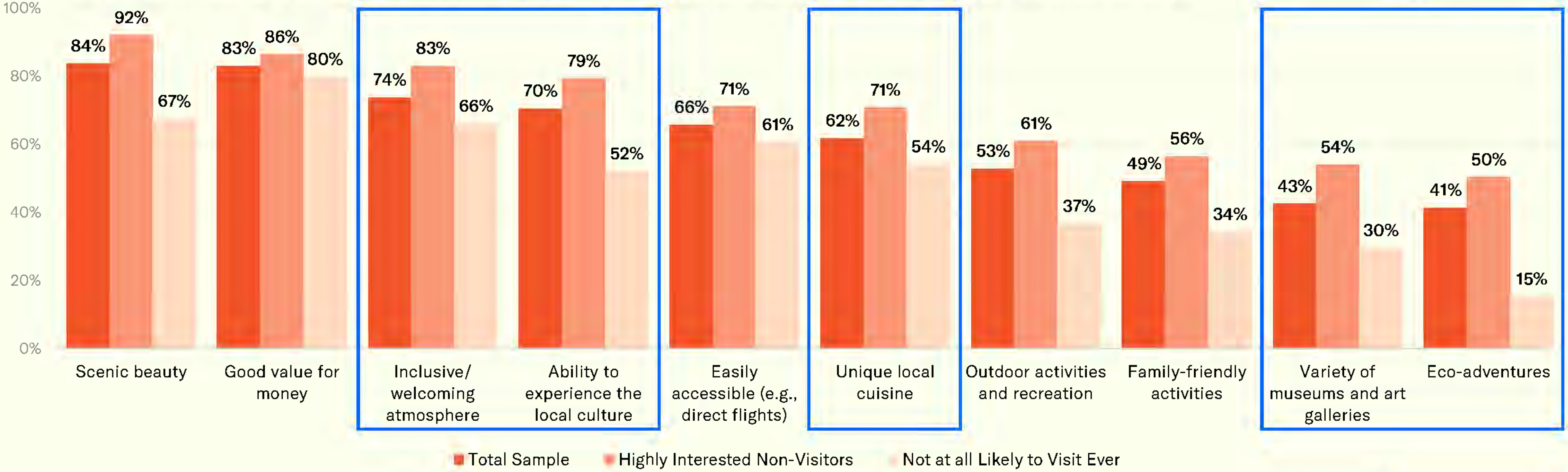


Question: How important are the following to you when selecting a vacation destination? *Bar segments represent % rating the attribute as the importance level indicated in chart legend; Dark red percentage numbers represent % rating attribute as "very" or "extremely important."* Base: Total respondents. 1,998 completed surveys.

Attracting convertible non-visitors: Place a greater emphasis on an inclusive and accessible community

While the leading destination attributes for convertible non-visitors align closely with those of the overall sample, gaps in proportion of population prioritizing those attributes can be capitalized upon. Significantly, this group places a greater value on an inclusive atmosphere (83%, vs. 74% of total sample) and the ability to experience the local culture (79%, vs. 70% of total sample). The emphasis on unique local cuisine, alongside the 50% of the group prioritizing eco-adventures, further suggests that authentic, immersive experiences are key to attracting this segment. Investment in highlighting Sedona's inclusive community and accessible experiences, paired with its rich tapestry of local flavors and cultural offerings, could yield a higher return on engagement and conversion with these potential visitors.

Top 10 Prioritized Destination Attributes for Potential Conversions (Highly Interested Non-Visitors), Gap Analysis



Question: How important are the following to you when selecting a vacation destination? *Bars represent % of group selecting "very" or "extremely important" for the destination attribute.*
Base: Total respondents. 1,998 completed surveys. Non-Visitors who are "very" or "extremely interested" in visiting Sedona in the next 3 years (High conversion-potential). 444 respondents.
Not at all Likely to Visit Ever – 119 respondents. *Largest Gaps are the categories with the highest difference between the Highly Interested Non-Visitor group and the Total Sample.

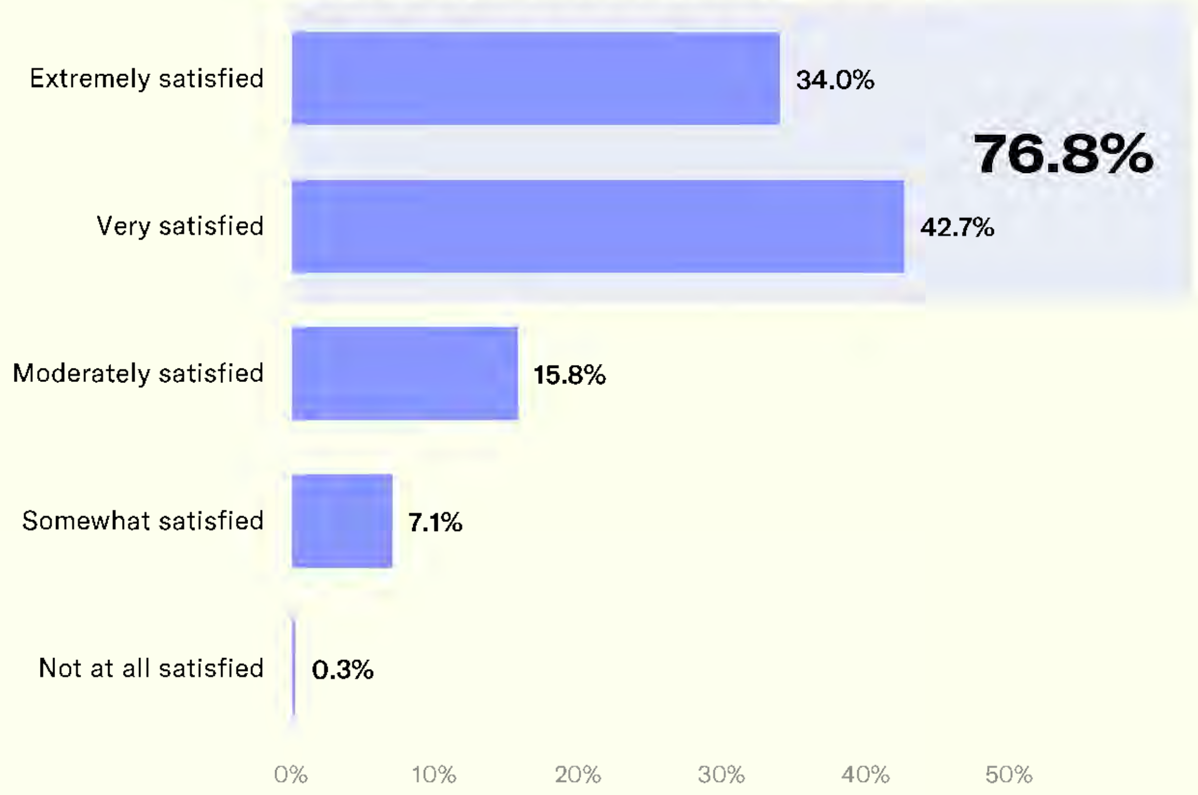
Largest Gaps*

Perceptions of Sedona

Over three-quarters of past visitors to Sedona were highly satisfied with their experience

An impressive one-third of visitors report being extremely satisfied with their trip. Visitors from Las Vegas and New York City are the most satisfied, exceeding the overall extreme satisfaction rate by 9 percentage points (43% for each city, vs. 34% of total sample). This could reflect the distinct appeal that Sedona's natural and active outdoor offerings have for individuals from more commercialized and urban cities; the contrast of Sedona's serene environment to bustling city life could be another factor.

Satisfaction with Visit to Sedona



By Market (In Order of % Extremely Satisfied)

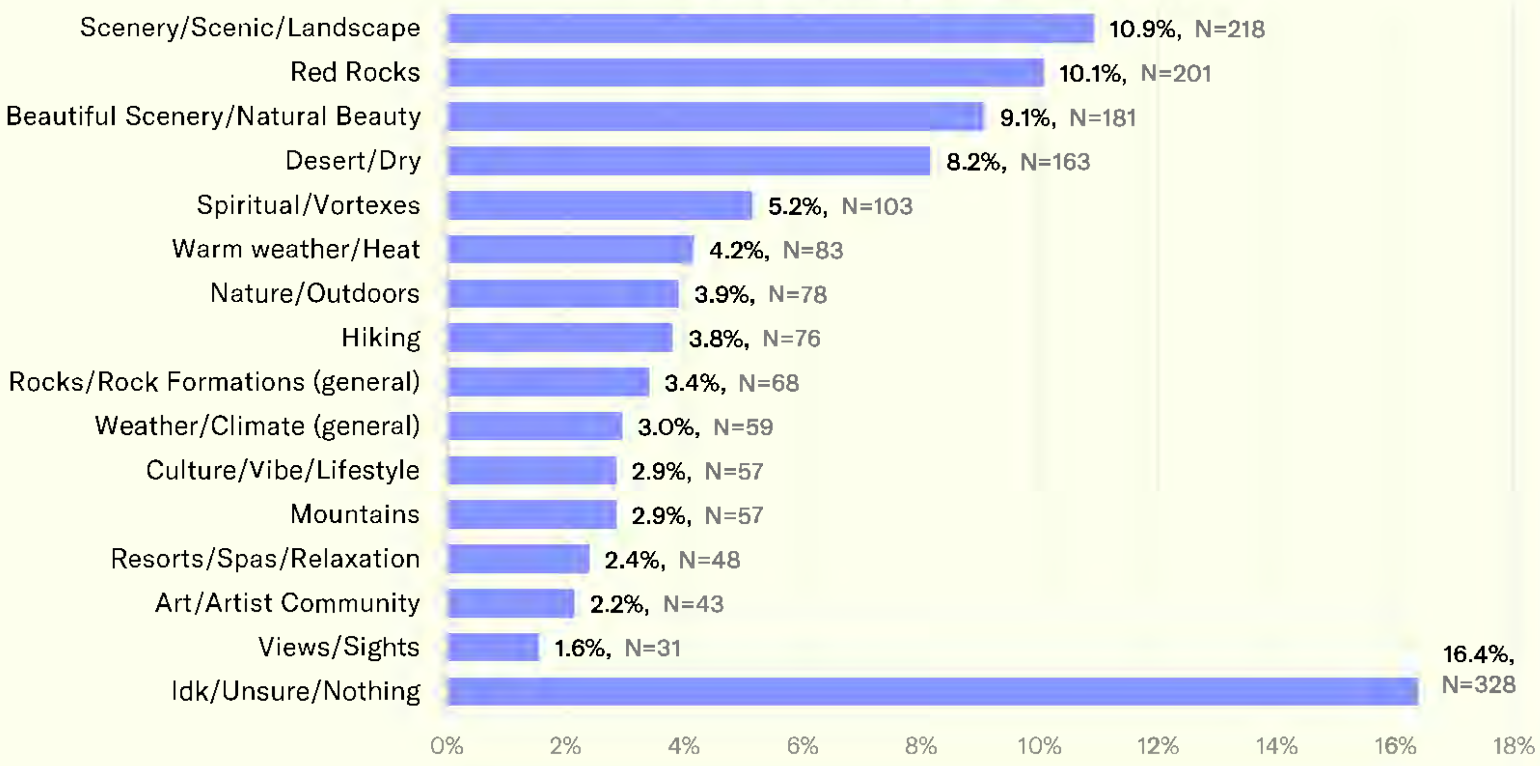
Market	Very satisfied	Extremely satisfied	Very + Extremely
Las Vegas	39%	43%	82%
New York City	37%	43%	80%
Phoenix	39%	39%	78%
San Francisco - Oakland - San Jose	42%	36%	78%
Chicago	43%	34%	77%
Seattle - Tacoma	38%	32%	70%
Los Angeles	49%	31%	80%
Minneapolis - St. Paul	44%	26%	71%
Dallas - Ft. Worth	46%	21%	67%
San Diego	52%	21%	72%

Question: You said you've visited Sedona as an adult. How satisfied were you with your experience visiting Sedona? *Bars represent % selecting the rating.*
Base: Past Sedona visitors. 851 completed surveys.

Scenic landscapes and red rocks define Sedona's unique appeal in the minds of travelers, as demonstrated by qualitative responses

Responses to an open-ended prompt clearly show that Sedona's scenic landscapes and iconic red rocks stand out in the minds of potential visitors, reflecting a strong association with natural beauty. The warm and dry climate, the presence of spiritual elements, and outdoor activities like hiking also feature relatively prominently, suggesting that Sedona's natural and recreational attributes are key to its brand identity. In qualitative details, specific references to Cathedral Rock and other renowned landmarks within Sedona reveal that they are trademark differentiators and significant draws for tourists.

Top Open-Ended Associations with Sedona



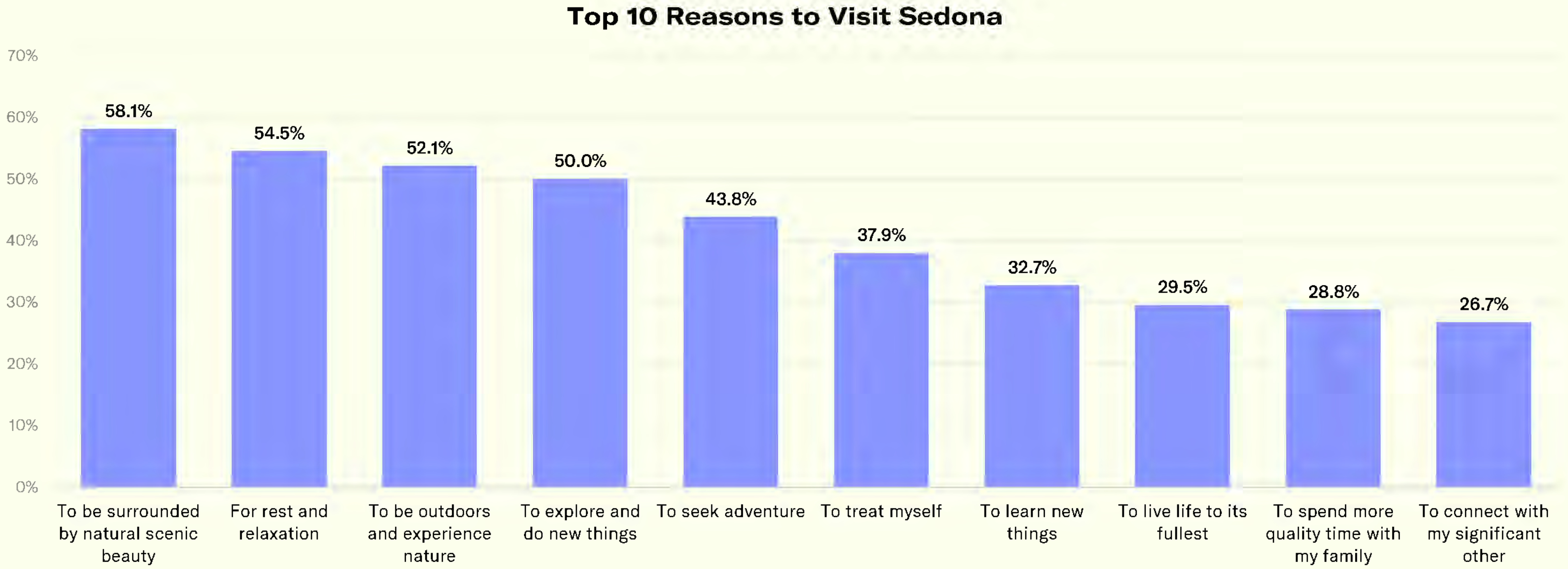
Question: Think about these destinations as places to visit for leisure. What makes each place unique/different? – Sedona, AZ.
Bars represent % of respondents mentioning each theme in their open-ended response (Gray # indicates the total volume of mentions per theme).
Base: Total respondents. 1,998 completed surveys.

Select Raw Qualitative Responses

- "artsy, and red rocks, and there's a spiritual force there...I forget what it's called"
- "Beautiful and quiet with lovely red rocks."
- "Beautiful nature and local artisans"
- "Hippy peaceful vibe"
- "Hot weather, desert vibes"
- "I have heard of this on social media"
- "I've heard this is a spiritual spot in Arizona."
- "Incredible sandstone features"
- "It is known for its mild climate and also art collection"
- "More of a place to relax or interact with nature"
- "Outdoor enthusiasts learn about cultures from the past"
- "Picturesque landscape and outdoor activities"
- "red rock formation, artsy atmosphere"
- "Red Rocks, Natural Scenery, and Relaxation"
- "Red sand stones, stunning scenery"
- "Sedona Arizona is just gorgeous looking."
- "The eclectic diversity and arts and culture"
- "The proximity to natural landmarks such as the giant red-rock structures and a laid-back atmosphere"
- "The red rock and the artist community"
- "They have a fair amount of wellness centers and spas."
- "unique community in the dessert with art and attractions"

Natural beauty and relaxation top visitors' reasons for choosing Sedona

Survey results reveal the desire for scenic beauty and relaxation as primary reasons for visiting Sedona, endorsed by 58% and 54.5%, respectively, indicating that its natural allure and potential for serenity and rejuvenation are major draws. The interest in outdoor experiences and exploration among half of travelers highlights an opportunity for Sedona to capitalize on adventure tourism.



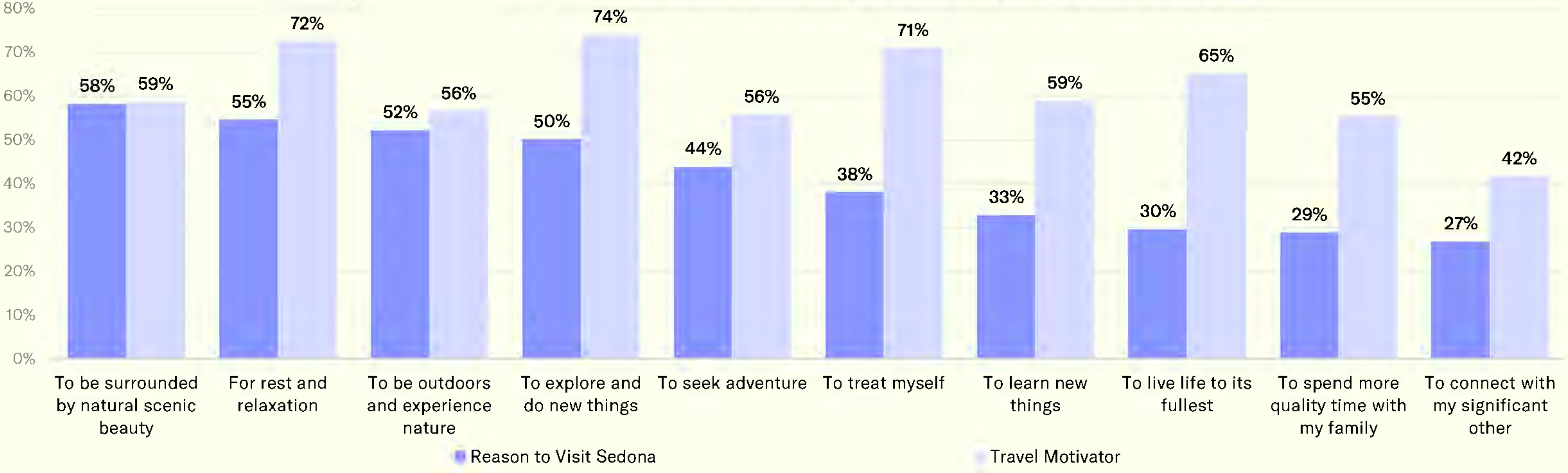
Question: Which of the following are reasons why you would visit Sedona? (Select all that apply.) *Columns represent % selecting the reason.*
Base: Total respondents. 1,998 completed surveys.

When envisioning visiting Sedona vs. traveling in general, travelers are less motivated by treating themselves or living life to its fullest and relatively more motivated by experiencing nature

"To treat myself" and "to live life to its fullest" are in the top 4 of general motivators (#3 and #4, respectively) but fall at 6th and 8th place for Sedona visitation reasons, with 33-35 percentage point gaps between global motivators vs. Sedona-specific. This indicates that while self-indulgence and a zest for life are key drivers for travel broadly, Sedona attracts visitors for more distinct travel motivations—particularly to be immersed in natural beauty and be outdoors and experience nature.

Top 10 Reasons to Visit Sedona

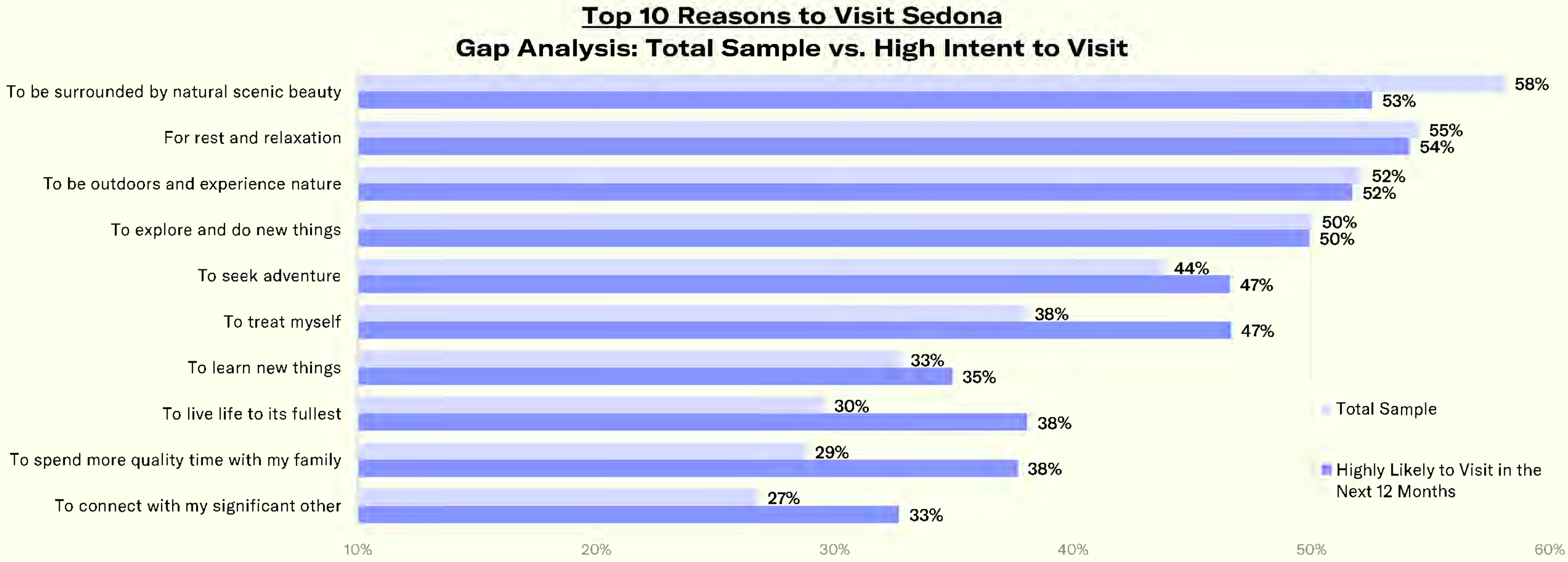
Gap Analysis: General Travel Motivators vs. Reasons to Visit Sedona



Question: Which of the following are reasons why you would visit Sedona? (Select all that apply.) / Which of the following reasons motivates you to travel? (Select all that apply.) *Columns represent % selecting the reason.*
Base: Total respondents. 1,998 completed surveys.

Travelers intending to visit Sedona in the near-term report slightly different levels of the top motivators for Sedona visitation

While top reasons for visiting Sedona among highly likely near-term visitors are identical to the overall market (being in nature and relaxation), likely near-term visitors are significantly more motivated to visit Sedona to treat themselves, live life to the fullest, spend more quality time with their family, and connect with their significant other.

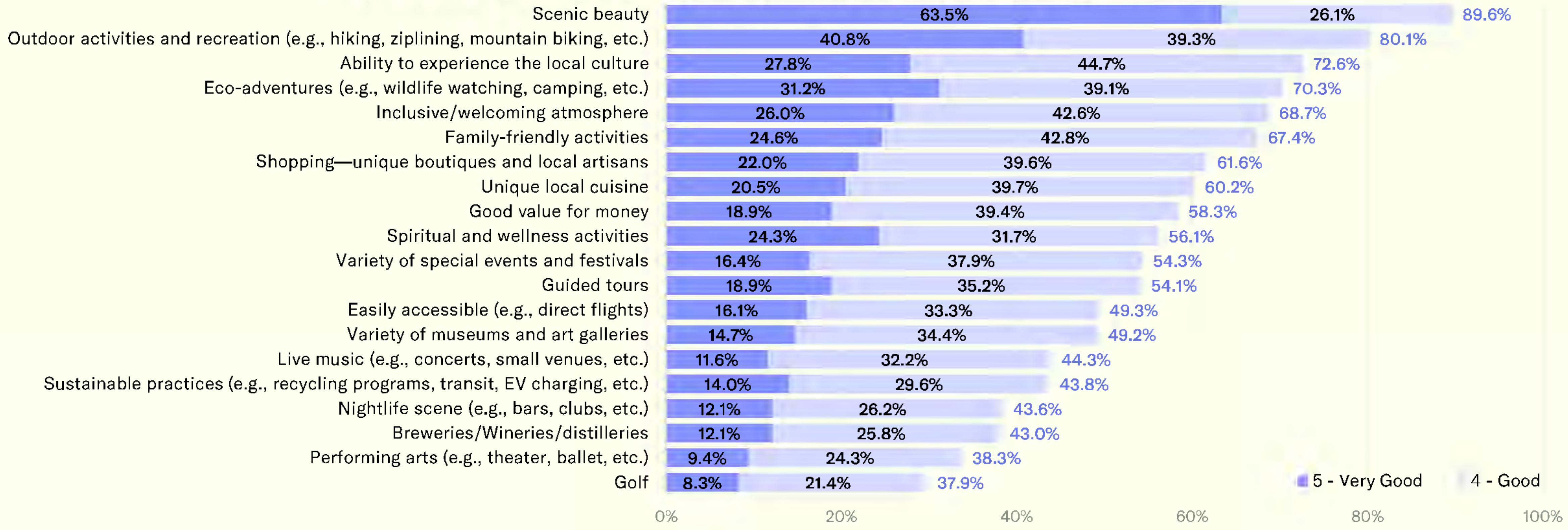


Question: Which of the following are reasons why you would visit Sedona? (Select all that apply.) *Columns represent % of group selecting the reason.*
Base: Total respondents. 1,998 completed surveys. Highly Likely to Visit Sedona in the Next 12 Months – 435 respondents.

Sedona excels in outdoor and scenic experiences, with room to grow in accessibility

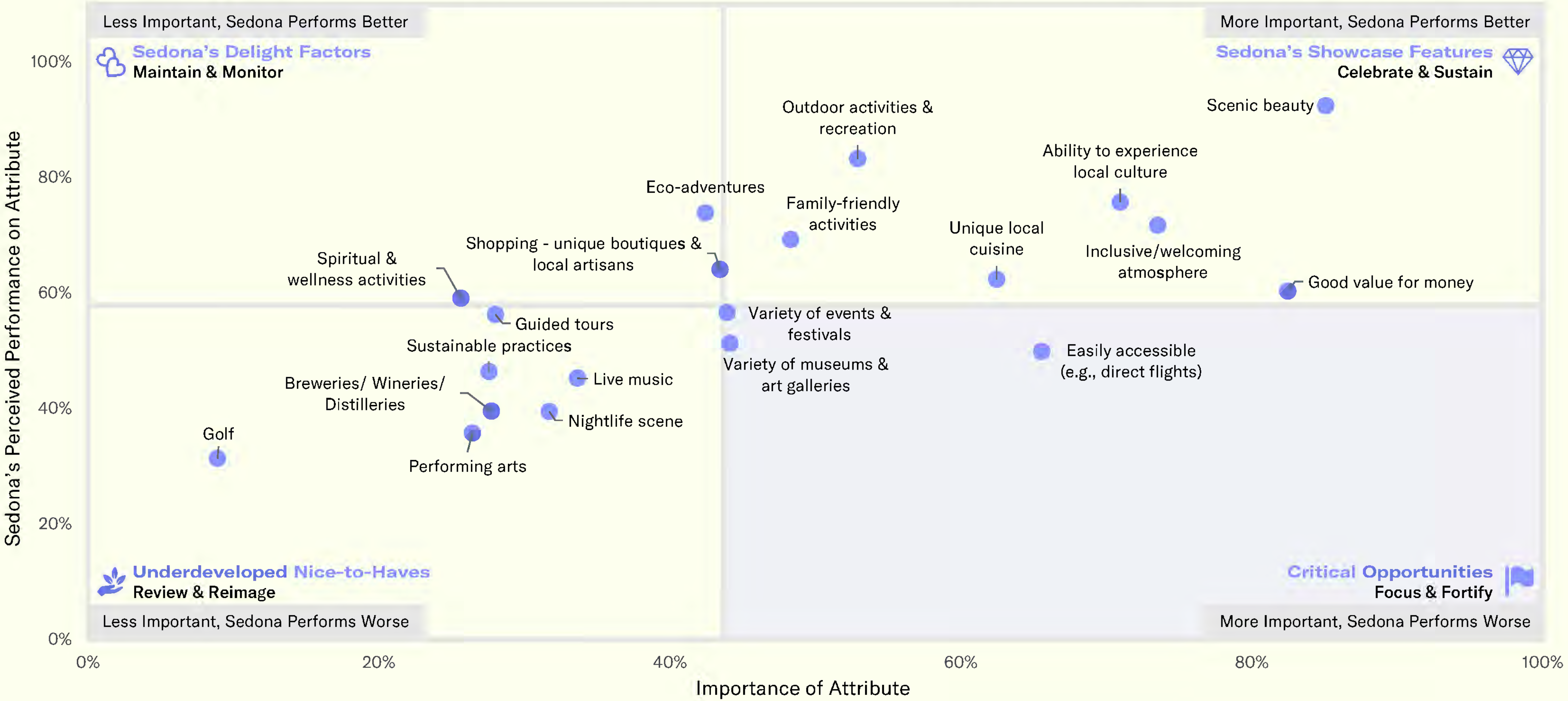
Sedona's natural attributes shine through as the survey results demonstrate top satisfaction in “Scenic beauty” (90% positive ratings) and “Outdoor activities and recreation” (80%), signaling the destination's strength in offering a compelling natural environment. High marks in “Ability to experience the local culture,” “Eco-adventures,” and inclusion highlight Sedona's appeal to those seeking cultural and environmental immersion. However, the data also suggests potential growth areas: “Easily accessible” (49%), in particular, scores lower relative to its general importance as an attribute, suggesting that enhancing Sedona’s accessibility could broaden its appeal.

Sedona’s Positive Performance on Destination Attributes



Question: Please rate Sedona on how well it delivers on each of the following attributes. Answer based on your current perceptions. *Bar segments represent % selecting rating indicated in chart legend. Purple percentage numbers represent % rating Sedona as doing a positive (“good” or “very good”) job delivering on the attribute.*
Base: Total respondents. 1,998 completed surveys.

Sedona's many strengths include its scenic beauty and access to local culture; opportunities include travel access, events, and museums

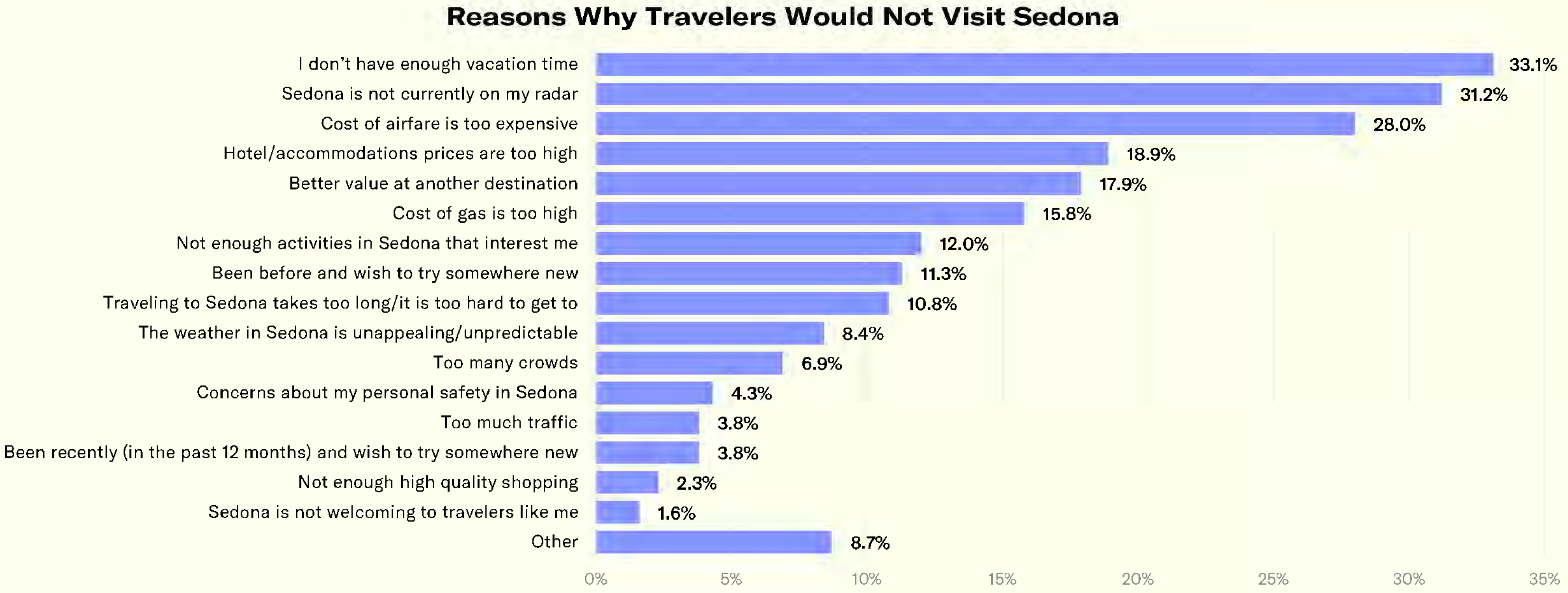


Base: Respondents who are at least somewhat familiar with / have heard of Sedona. 1,733 completed surveys.

Importance: *% rating attribute as "very" or "extremely" important when selecting a vacation destination*
Sedona's Perceived Performance on Attribute: *% rating Sedona as "good" or "very good" at delivering on the attribute*
Axes are set at median values.

Time constraints and costs are key barriers to visiting Sedona

The primary reasons deterring travelers from visiting Sedona relate to vacation time constraints (endorsed by 33.1% of those who are "not at all," "somewhat," or "moderately likely" to visit Sedona in the next 12 months) and the perceived high cost of visiting the destination (cost of airfare at 28%, lodging at 19%, and gas at 16%). Addressing these barriers through targeted marketing that highlights value and accessibility could mitigate concerns and encourage more visits.



Question: Which of the following are reasons why you might not visit Sedona in the next 12 months? (Select all that apply.) *Bars represent % selecting the reason.*
Base: Respondents who are "not at all," "somewhat," or "moderately likely" to visit Sedona in the next 12 months. 1,603 completed surveys.

Nearly half of those who are not likely to visit Sedona in the next 12 months or ever are reluctant because Sedona is not on their radar

This represents a 15+-point gap over the total sample (which includes those who are only somewhat or moderately likely), signaling that efforts to increase awareness could yield returns. Additionally, those who intend to never visit Sedona are less likely to cite practical limitations such as cost or lack of time and more likely to avoid visiting because they believe they can get better value elsewhere, there are not enough activities that interest them, or the weather is unappealing or unpredictable.

Question: Which of the following are reasons why you might not visit Sedona in the next 12 months? (Select all that apply.) *Columns represent % of group selecting the reason.*
Base: Total Sample = Respondents who indicated they are not at all, somewhat, or moderately likely to visit Sedona in the next 12 months. 1,563 completed surveys. Likely to Visit Ever, but Not at All Likely to Visit in the Next 12 Months – 554 respondents. Not At All Likely to Ever Visit Sedona – 119 respondents.

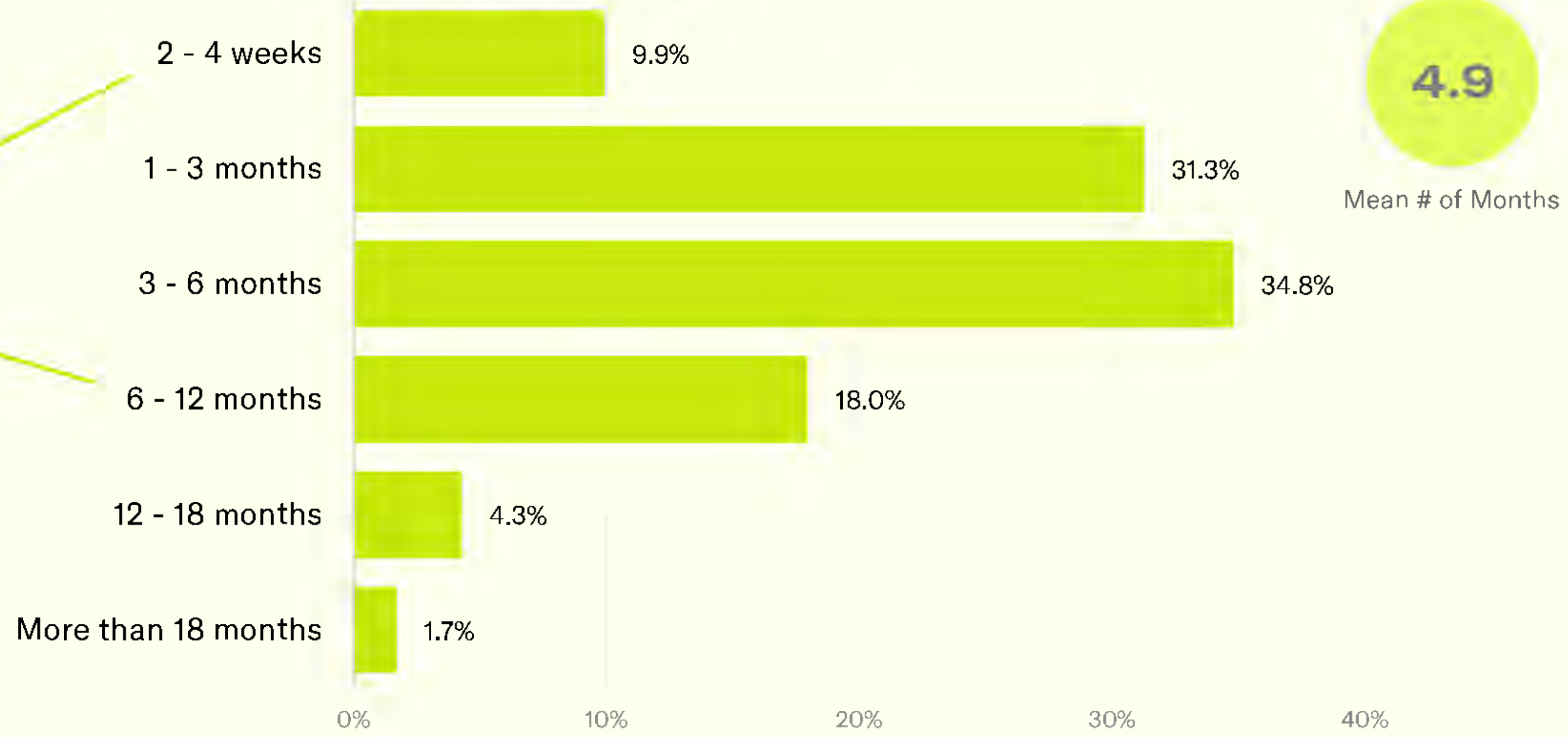
Sedona Travel Plans

The average planning window for likely Sedona visitors is 4.9 months, with a plurality of respondents reporting a 3- to 6-month range

The planning window for Sedona trips indicates a tendency towards medium-term planning, with most visitors starting their arrangements 1 to 6 months in advance. This suggests a need for timely and targeted marketing campaigns that can influence decision-making within this crucial period. Additionally, a significant portion of travelers likely to visit within the next year lean towards short-term planning of 2-4 weeks, suggesting the need for flexible and last-minute booking options to cater to this trend.

Likely Planning Window for a Sedona Trip

Perhaps unsurprisingly, those highly likely to visit in the next **12 months** are significantly more likely to plan their travel 2 – 4 weeks in advance **(26.8%)** and significantly less likely to start 6 – 12 months in advance **(6.0%)**. People from Phoenix are disproportionately likely to visit in the next 12 months (overrepresented in the subsample), which could explain why less planning time seems necessary.

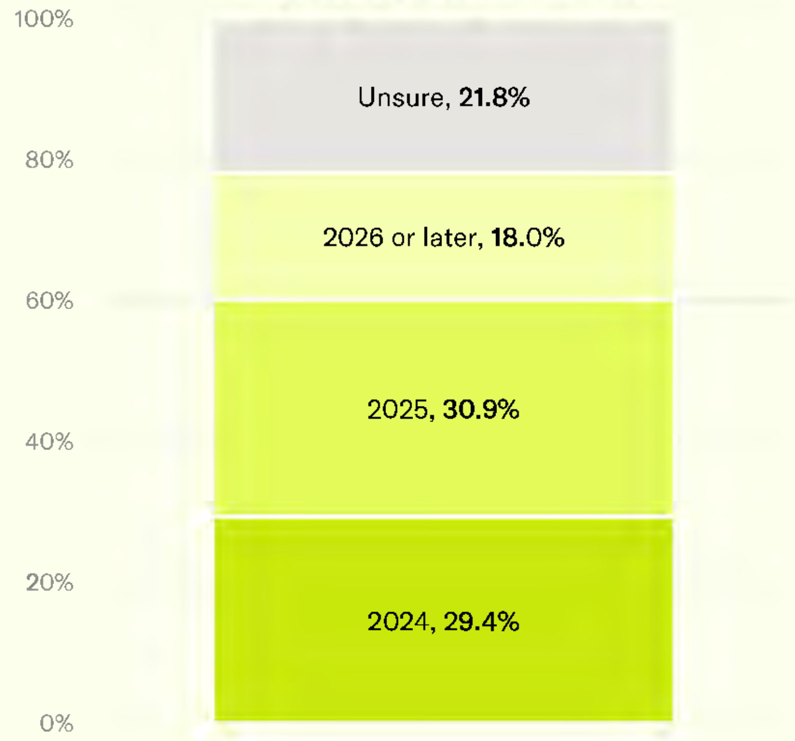


Question: How far in advance would you start planning your travel? (Select one.) *Bars represent % selecting the time frame / planning window.*
Base: Respondents who indicated they are at least somewhat likely to ever visit Sedona. 1,879 completed surveys. Highly Likely to Visit Sedona in the Next 12 Months – 435 respondents.

April and May emerge as Sedona's peak visit months, with sustained visitor interest spanning into 2025 and beyond

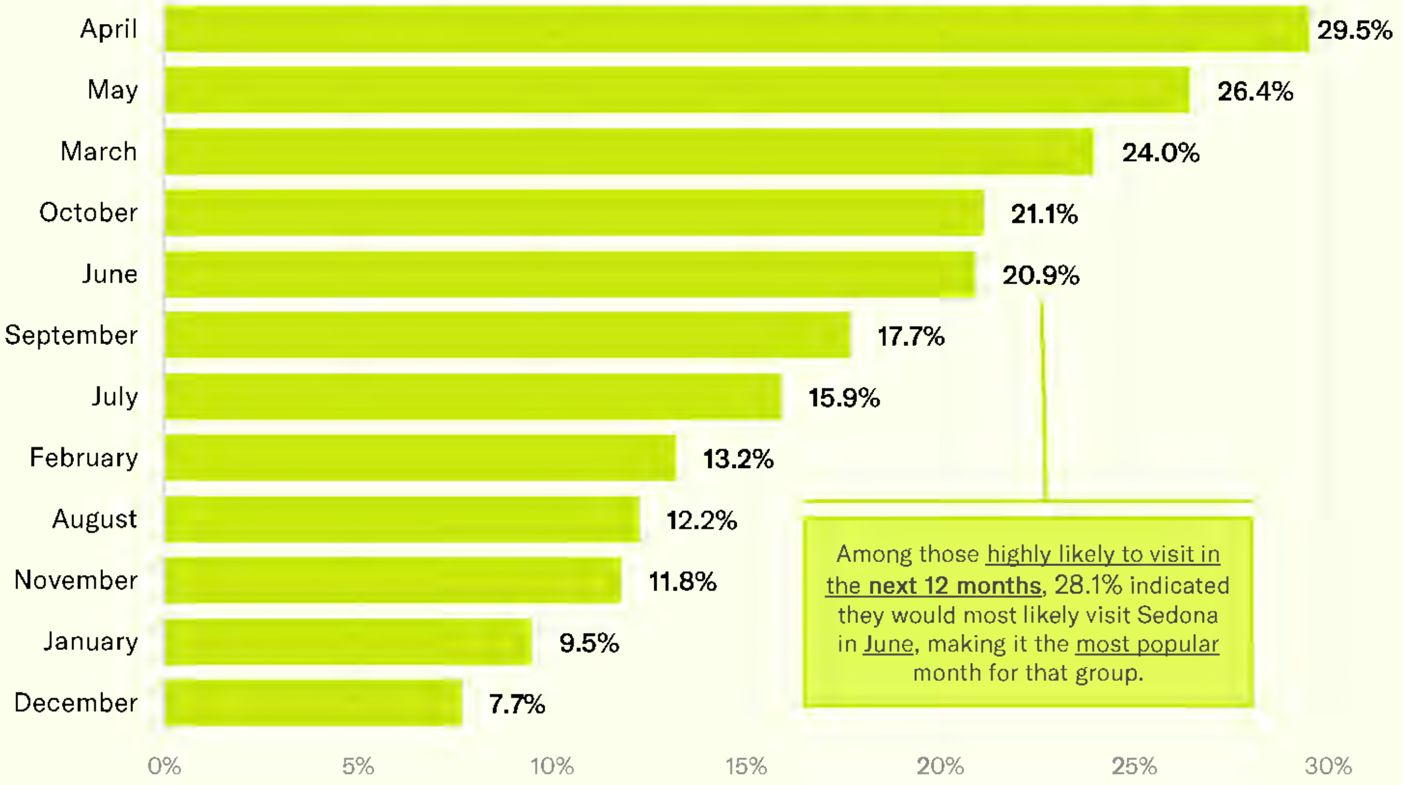
Travelers clearly prefer springtime travel to Sedona, with April and May being the most favored months for potential visits. The long-term, general visitation timeline shows that only 22% of respondents are unsure of their likely time of visit, reflecting a promising concreteness to the travel intentions. Additionally, while 29% of respondents are likely to visit in the coming year, a significant contingent is also considering travel to Sedona in 2025 and later.

Likely General Time Frame for a Leisure Visit to Sedona



Question: When would you be MOST LIKELY to visit Sedona, Arizona for leisure? (Select one.) *Bar segments represent % selecting the labeled year.*
Base: Respondents who indicated they are at least somewhat likely to ever visit Sedona. 1,879 completed surveys.

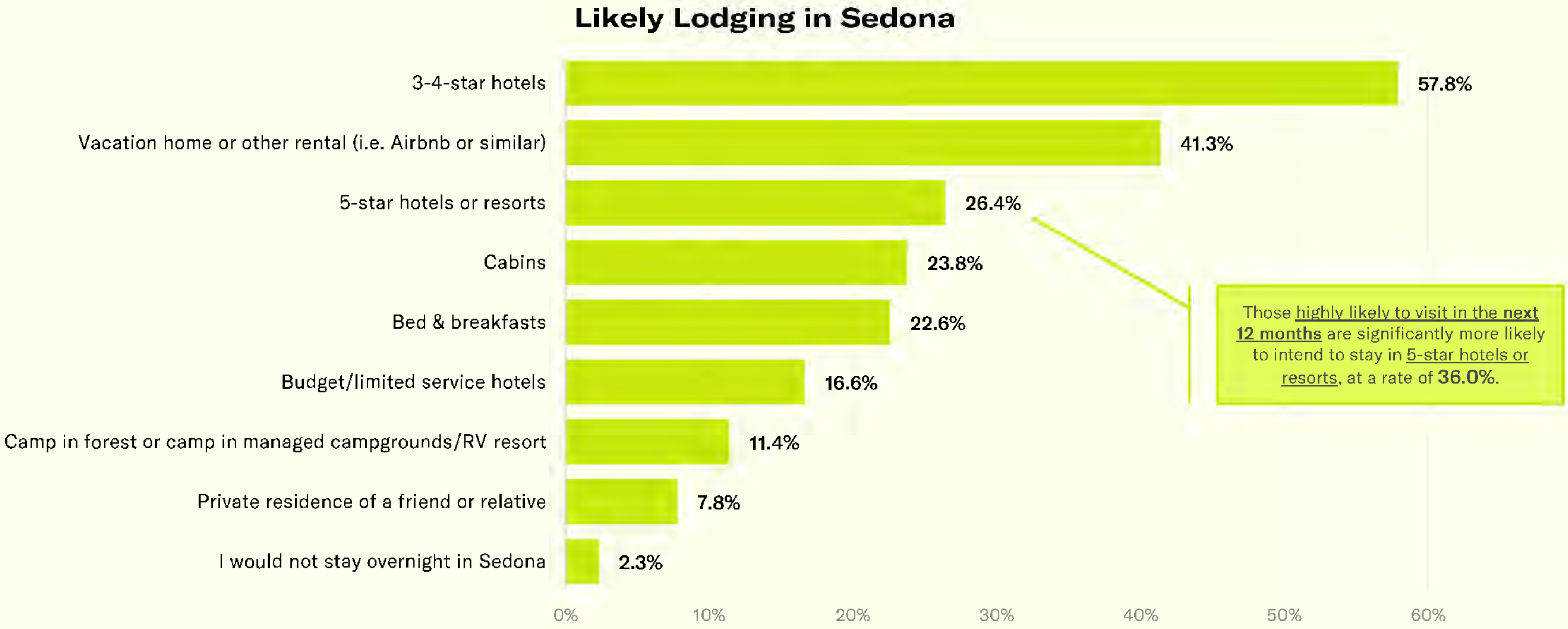
Most Likely Month for a Visit to Sedona



Question: In which month(s) would you most likely visit Sedona, Arizona? (Select all that apply.) *Bars represent % selecting the month.*
Base: Respondents who indicated they are at least somewhat likely to ever visit Sedona. 1,879 completed surveys. Highly Likely to Visit Sedona in the Next 12 Months – 435 respondents.

Mid-range hotels lead with notable interest in five-star experiences

The majority of potential visitors lean towards 3- to 4-star hotels (57.8%) and a sizeable portion would be likely to use a vacation rental (41.3%), signifying a demand for comfortable yet affordable lodging. Still, there is a substantial segment of near-term visitors (36%) showing a distinct preference for luxury accommodations. This suggests a dual market for both mid-range and high-end hospitality services in Sedona.

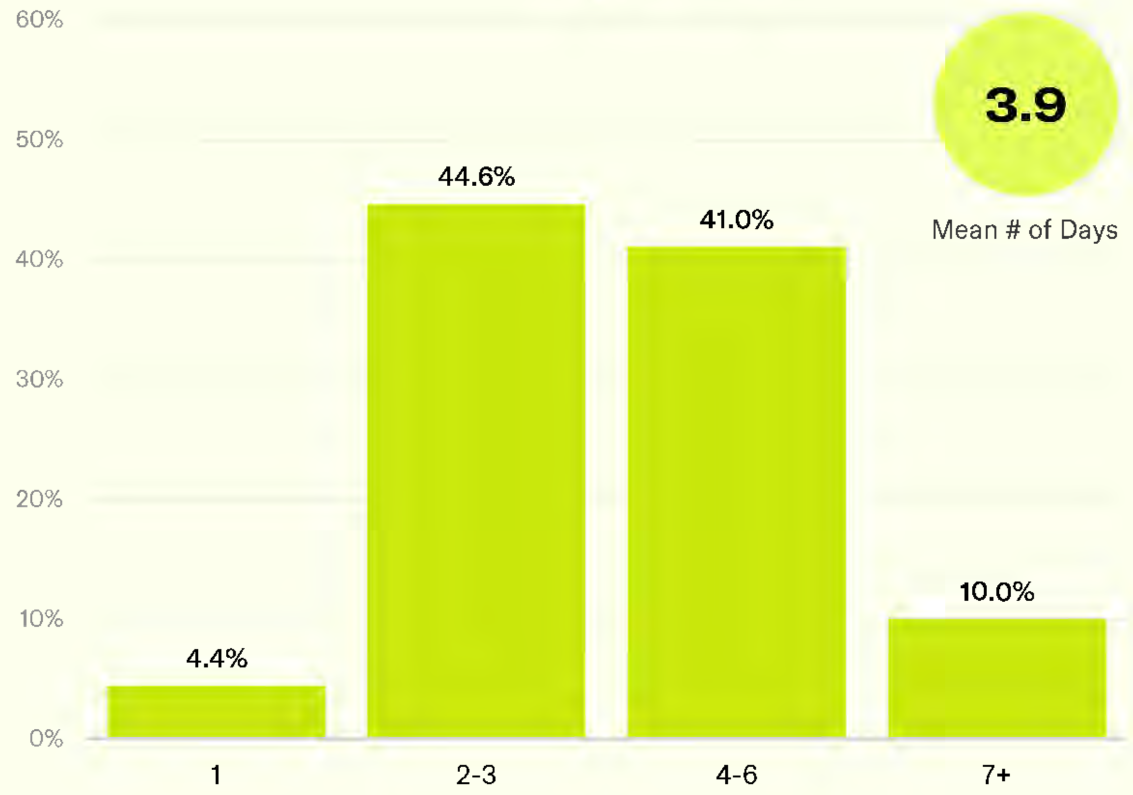


Question: Where would you stay in Sedona, Arizona? (Select all that apply.) *Bars represent % selecting the lodging type.*
Base: Respondents who indicated they are at least somewhat likely to ever visit Sedona. 1,879 completed surveys. Highly Likely to Visit Sedona in the Next 12 Months – 435 respondents.

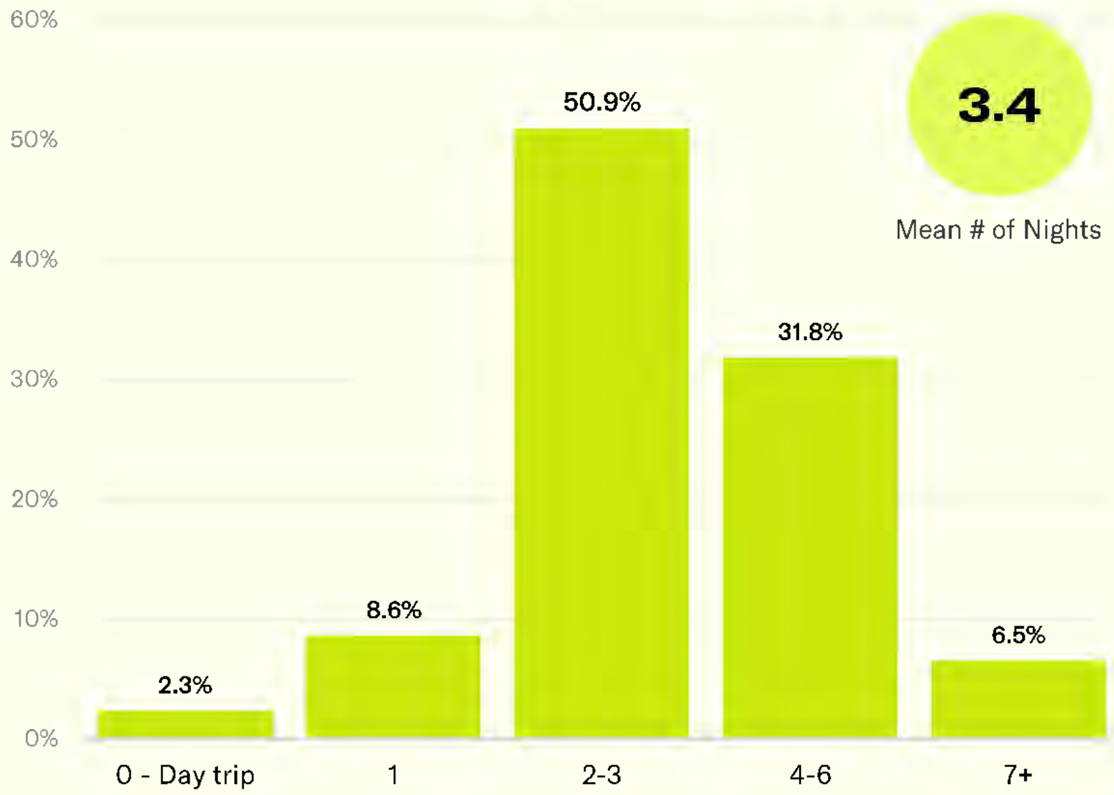
Short stays dominate, with a trend towards extended Sedona vacations

Travelers likely to visit Sedona plan stays of around 3 to 4 days, with a mean of 3.9 days and 3.4 nights. Travelers are most likely to forecast a 2- to 3-day stay (44.6%, vs. 41% selecting between 4 to 6 days).

Likely Length of Stay – Days



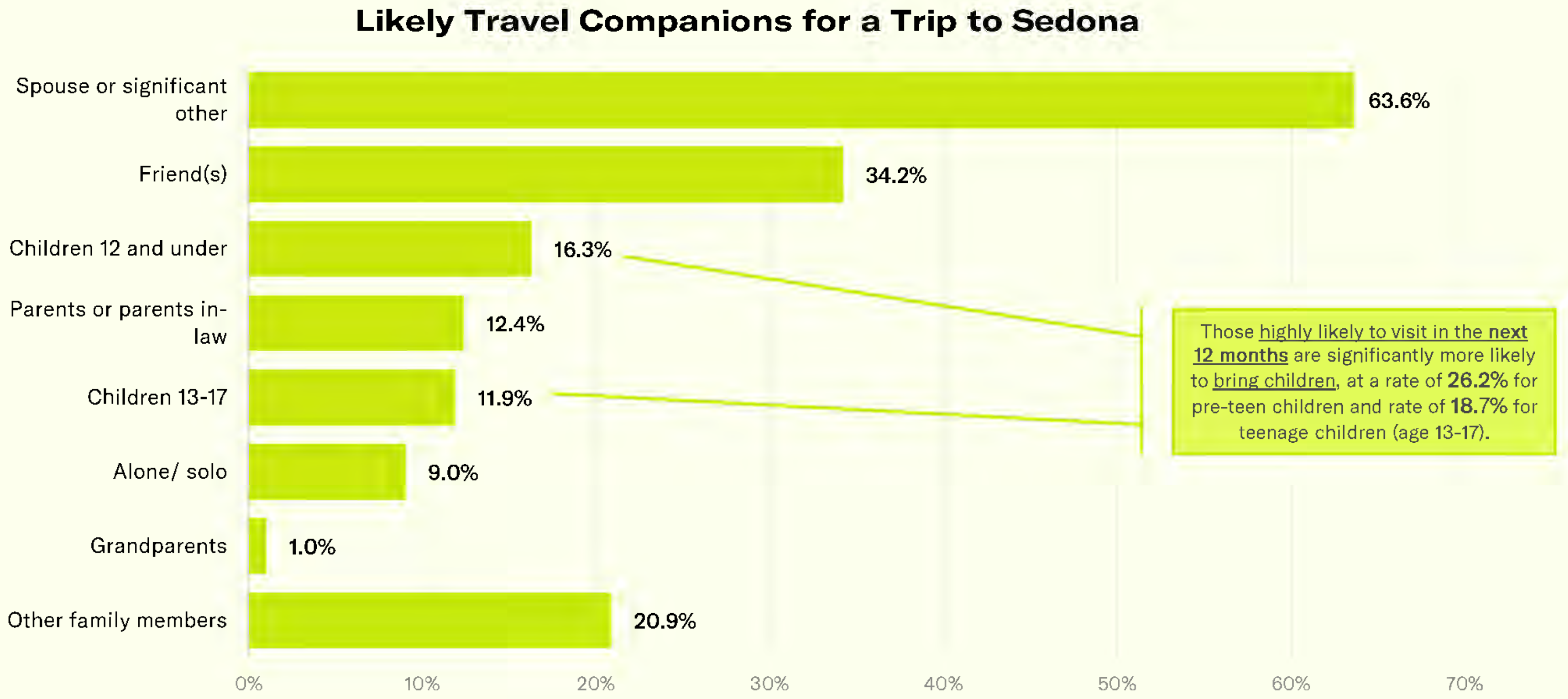
Likely Length of Stay - Nights



Question: How many days and nights would you spend in Sedona? – Days (Left) & – Nights (Right). *Bars represent % reporting in that range using drop-down menus ranging from 0 (nights)/1 (days) - 30 or more.*
Base: Respondents who indicated they are at least somewhat likely to ever visit Sedona. 1,879 completed surveys.

Sedona is seen as both a romantic and family destination with potential visitors expressing diverse trip companion preferences

Sedona trips are predominantly planned with spouses or significant others, with family travel, especially with children under 12 (16.3% of all likely visitors; 26% for highly likely near-term visitors), also being significant. This family-oriented travel trend can inform family-friendly programming and marketing strategies. Overall, the data highlights Sedona's appeal for both romantic getaways and family trips.

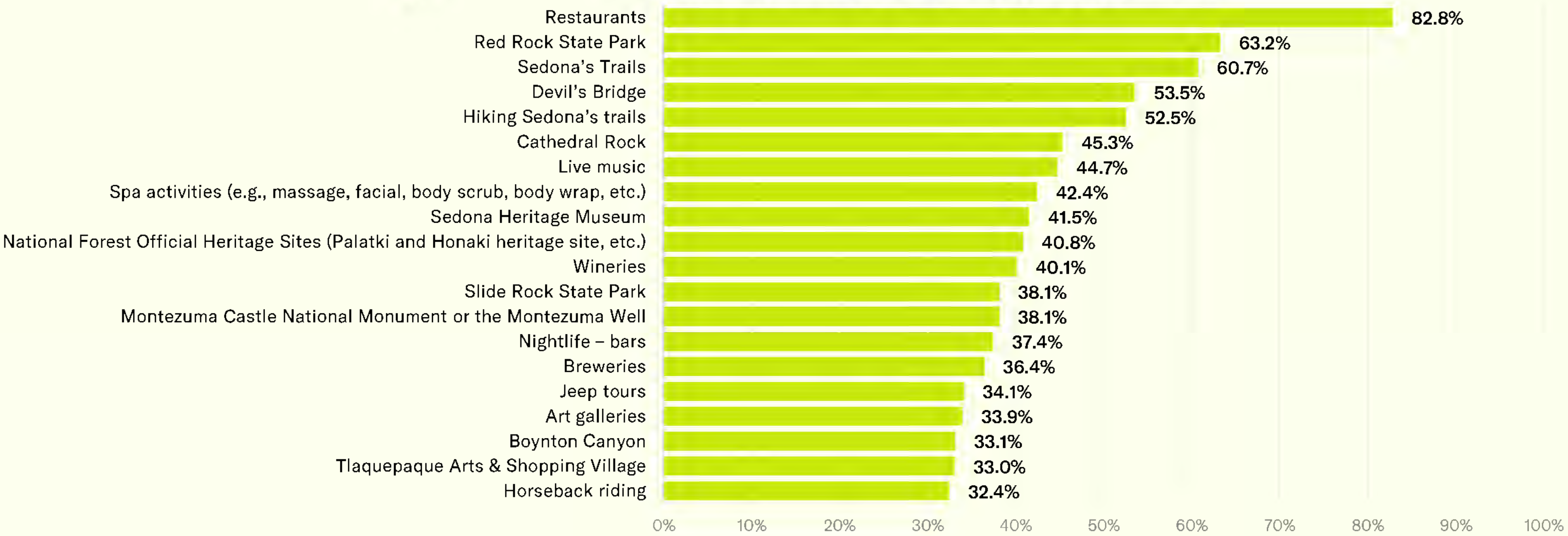


Question: Who would you travel with? (Select all that apply.) *Bars represent % selecting the travel companion type.*
Base: Respondents who indicated they are at least somewhat likely to ever visit Sedona. 1,879 completed surveys. Highly Likely to Visit Sedona in the Next 12 Months – 435 respondents.

Sedona's natural attractions top visitor wish lists, with significant interest in spa activities, food and beverages, heritage attractions, and entertainment (e.g., live music, nightlife)

Dining out tops the list of activities for Sedona visitors, followed closely by the natural splendor of Red Rock State Park and the various trails. The strong interest in outdoor and culinary experiences suggests leveraging Sedona's scenic landscapes and unique local cuisine in promotional efforts. Wellness and spiritual activities fell toward the bottom of the list overall, indicating a niche interest.

Top 20 Things Likely Visitors Would Do or See While in Sedona



Question: Which of the following experiences would you pursue when visiting Sedona? (Select all that apply.) *Bars represent % selecting the activity or experience.*
Base: Respondents who indicated they are at least somewhat likely to ever visit Sedona (excluding those who reported being "not at all likely" to ever visit Sedona). 1,879 completed surveys.

Categorizing preferred activities showcases Sedona's appeal across diverse interests, from its natural attractions and wellness activities to its cultural and historical sites

Marketing can be segmented to highlight these categories, tailoring messages to resonate with specific traveler interests.

Most Desired Sedona Experiences by Category

Natural Attractions	
Red Rock State Park	63.2%
Sedona's Trails	60.7%
Devil's Bridge	53.5%

Cultural and Historical Attractions	
Sedona Heritage Museum	41.5%
National Forest Official Heritage Sites (Palatki and Honaki heritage site, etc.)	40.8%
Montezuma Castle National Monument or the Montezuma Well	38.1%

Outdoor Activities	
Hiking Sedona's Trails	52.5%
Jeep tours	34.1%
Horseback riding	32.4%

Spiritual and Wellness Activities	
Spa activities (e.g., massage, facial, body scrub, body wrap, etc.)	42.4%
Visit or meditate in vortex sites	21.8%
Crystal-related activities (e.g., healing sessions, meditation sessions, grid placements, etc.)	21.8%

Culinary Experiences	
Restaurants	82.8%
Wineries	40.1%
Breweries	36.4%

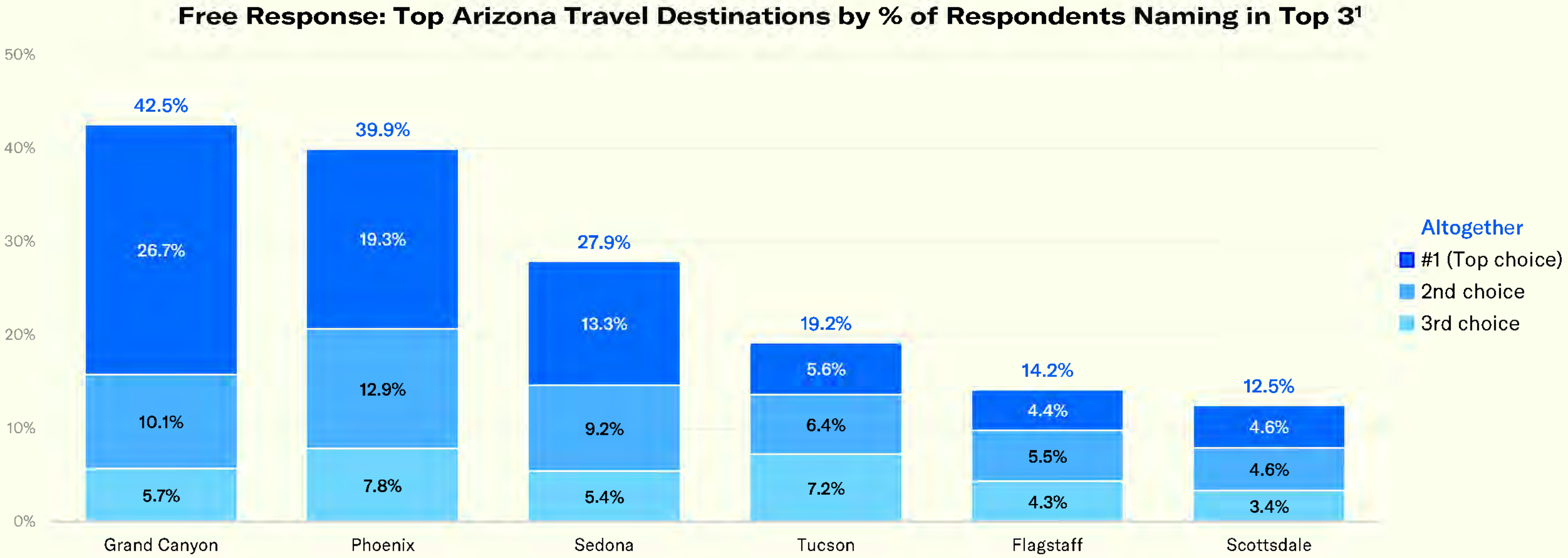
Entertainment and Arts	
Live music	44.7%
Nightlife – bars	37.4%
Art galleries	33.9%

Question: Which of the following experiences would you pursue when visiting Sedona? (Select all that apply.) *%s represent the proportion of the sample selecting the experience.*
Base: Respondents who indicated they are at least somewhat likely to ever visit Sedona (excluding those who reported being "not at all likely" to ever visit Sedona). 1,879 completed surveys.

Competitive Position of Sedona

Sedona shines as a top choice amid Arizona's travel destinations in unaided appeal, overshadowed only by the Grand Canyon and Phoenix

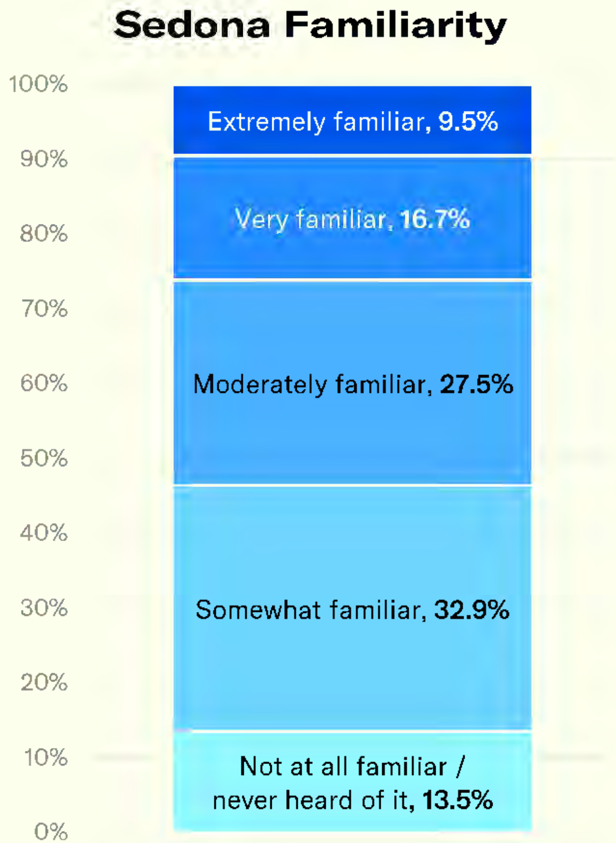
Sedona secures a significant share of potential visitors' interest (28% of the sample overall) as a top three choice for travel in Arizona, trailing closely behind the iconic Grand Canyon and the large sprawling capital of Phoenix. The data underscores Sedona's competitive edge as a sought-after destination that captivates travelers with its unique blend of natural beauty, rich culture & history, and air of tranquility.

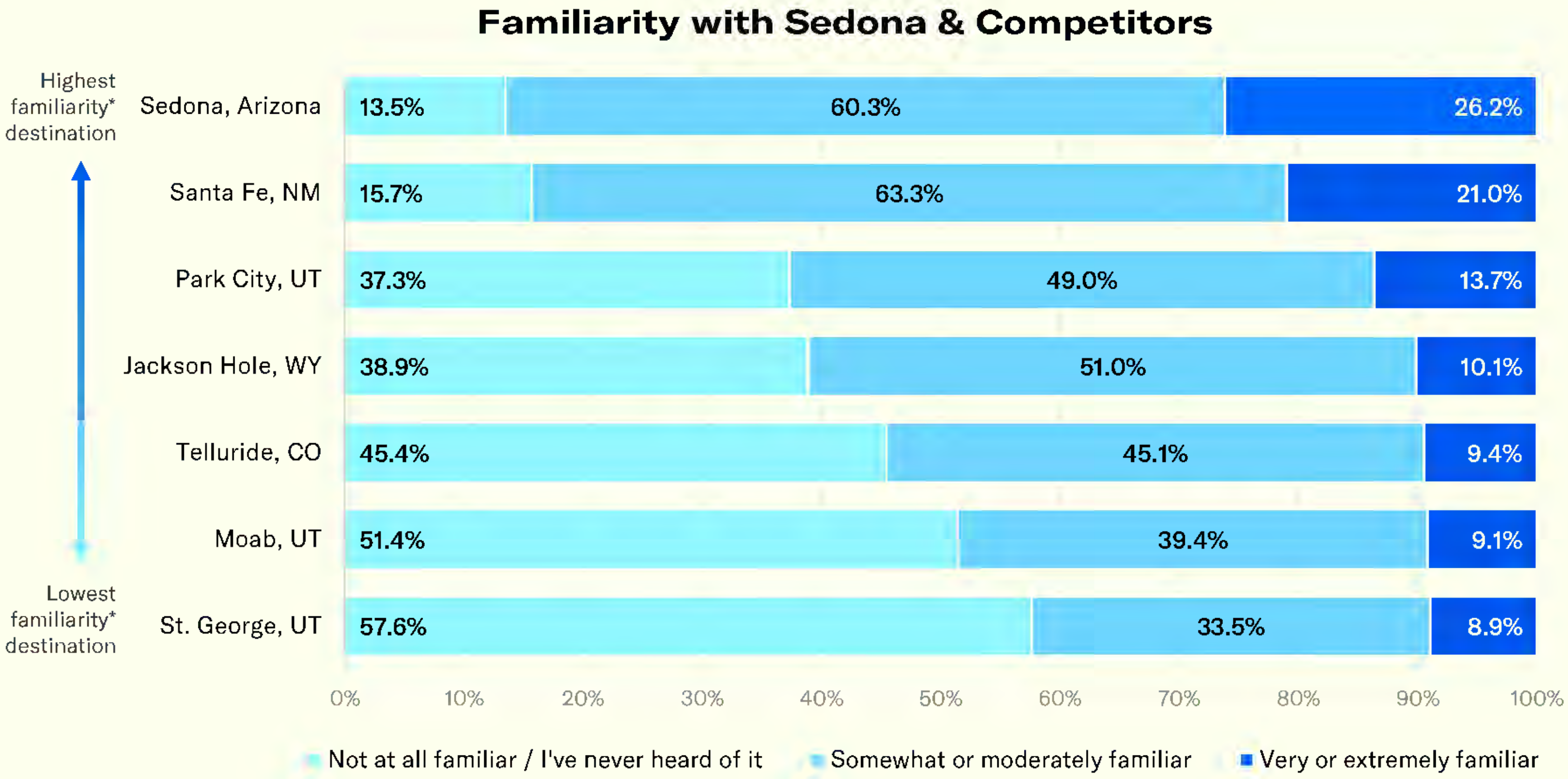


Question: What are the top three destinations within Arizona you most want to visit in the next five years? *(Open-ended). Column segments represent % of sample naming each place as their #1, #2, or #3 top Arizona destination.*
[1]Note: These are raw, unweighted percentages of sample respondents.
Base: Total respondents. 1,998 completed surveys.

Sedona ranks high in familiarity, topping other Southwestern gems

Sedona holds the peak competitive position in terms of familiarity to potential travelers, surpassing even New Mexico's state capital Santa Fe.



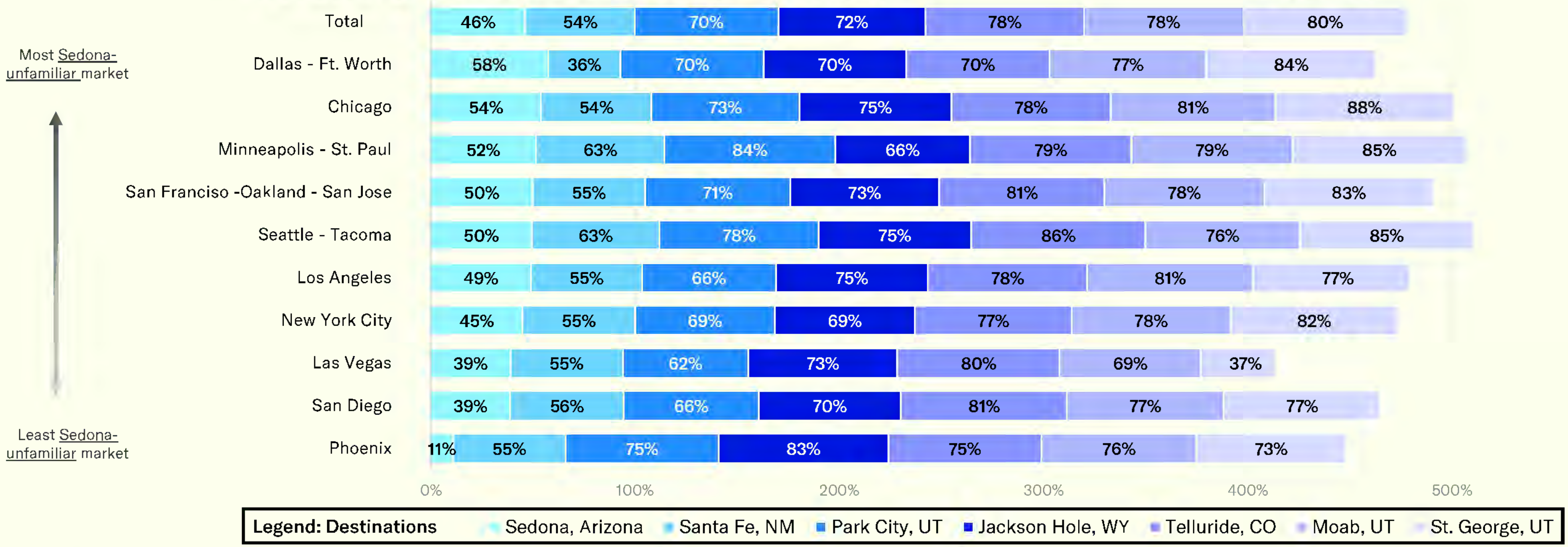


Question: How familiar are you with each of the following cities? Familiarity can include knowing about the city, even if you have not visited. *Left side: Column segments represent % selecting the labeled response for Sedona. Right side: bar segments represent % selecting the response(s) indicated in the chart legend for the destination.* *Level of familiarity defined by % of total sample rating themselves as "very" or "extremely" familiar with the destination.
Base: Total respondents. 1,998 completed surveys.

Large proportions (39%-58%) of target markets are "not at all or only "somewhat" familiar with Sedona; however, they are generally far less familiar with competitor destinations

The Seattle, Minneapolis - St. Paul, and Chicago markets report especially low familiarity with competitor destinations. Those markets indicate being "not at all" or "somewhat familiar" with competitors at rates of 75-77%, over 20 percentage points higher than their absence of / low familiarity with Sedona (50-54%).

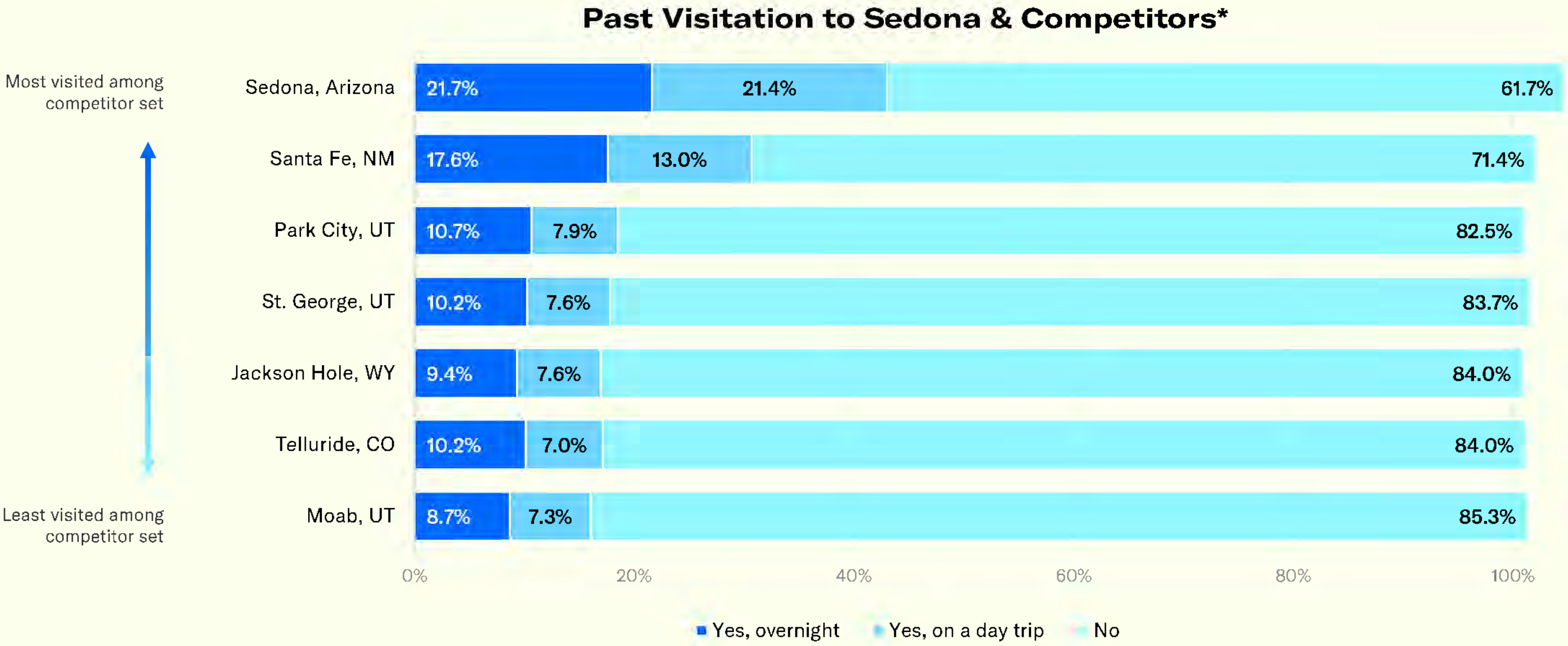
% Not at All or Somewhat Familiar with Sedona & Competitor Destinations, by Market



Question: How familiar are you with each of the following cities? Familiarity can include knowing about the city, even if you have not visited. *Bar segments represent % of group selecting "not at all" or "somewhat familiar" for the destination as indicated in chart legend.* Base: Total respondents. 1,998 completed surveys. Per market: 200 respondents for every market except San Diego, where n = 198.

Sedona outpaces regional competitors in past visitation

Sedona's past visitation rates are robust, outshining competitors and indicating a high level of traveler satisfaction and repeat appeal – in fact, 1 in 3 past visitors intend to visit in the next 12 months, compared to 19.8% of the sample overall and tripling the 11% of non-visitors *(findings not depicted in chart)*. This loyalty is a testament to the destination's enduring charm and how its offerings resonate with visitors. Sedona's superior past visitation rate compared to competitors also holds across markets except for Dallas – Fort Worth, where 50% of residents have visited Santa Fe and 36% have visited Sedona *(per-market data not depicted in chart)*.

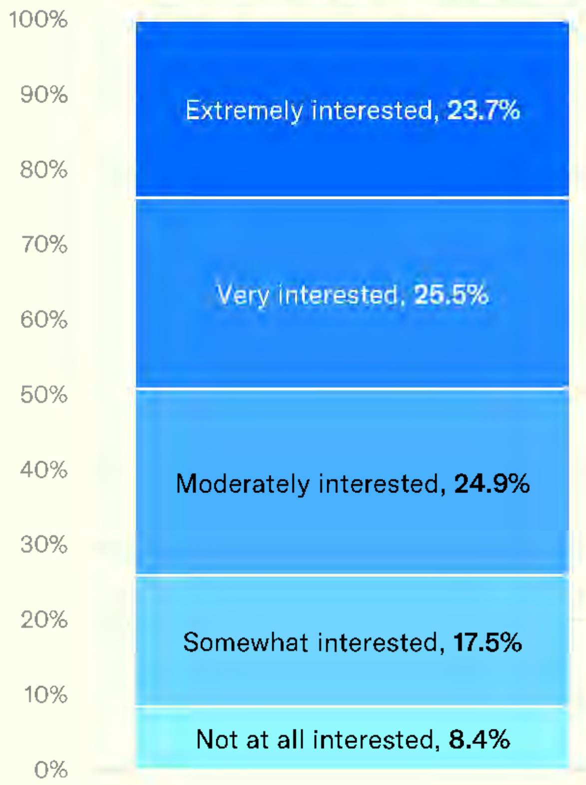


Question: Have you ever visited the following cities as an adult (that is, after age 18)? *Bar segments represent % selecting response indicated in chart legend.*
Base: Total respondents. 1,998 completed surveys.
* %ages add up to more than 100% because respondents could indicate both day visitation as well as overnight visitation.

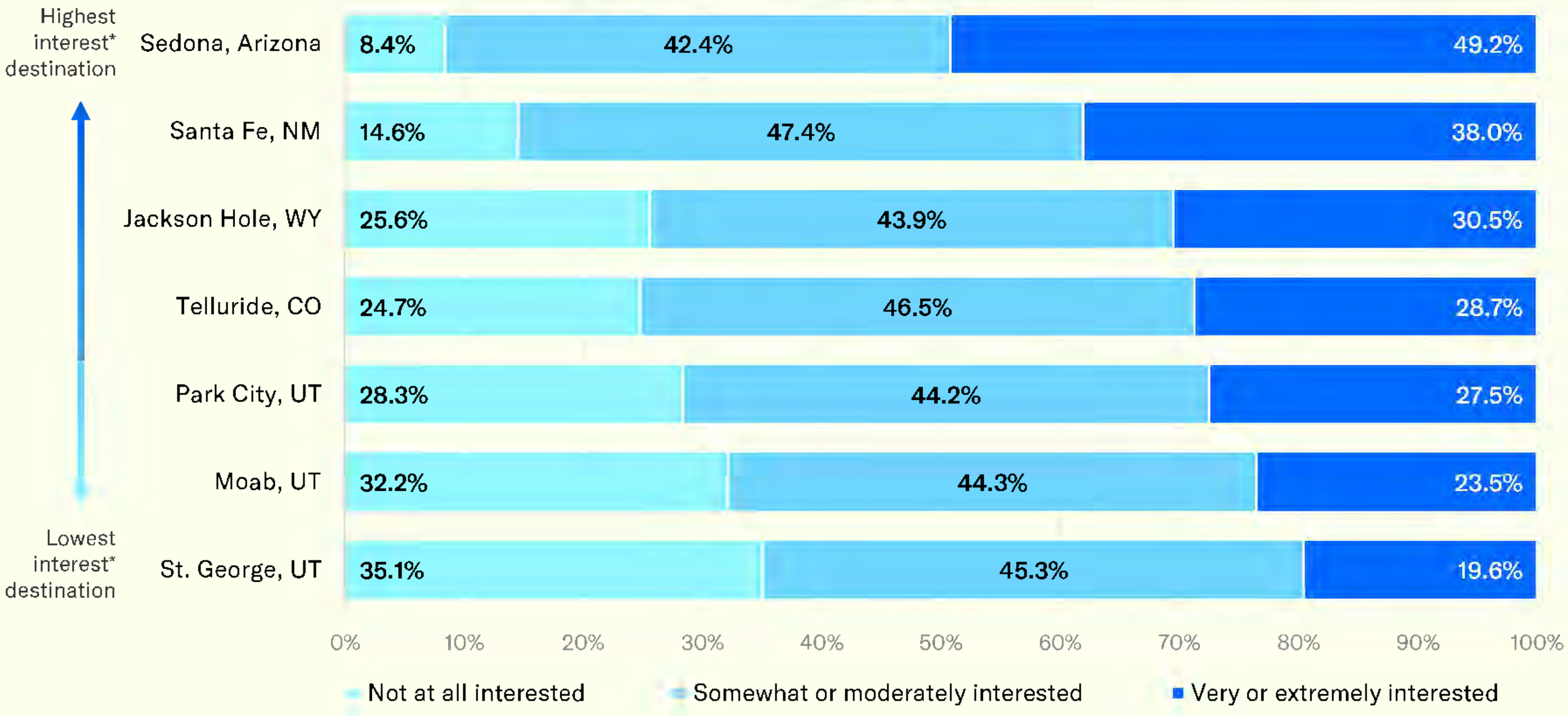
Sedona captures travelers' interest, edging out regional rivals such as Santa Fe by over 10 percentage points, while Utah destinations garner the least interest

Sedona's allure is evident, with a significant proportion of respondents expressing strong interest in visiting, outperforming other notable destinations. This interest is pivotal for strategic marketing to harness and convert into future visitation.

Interest in Sedona



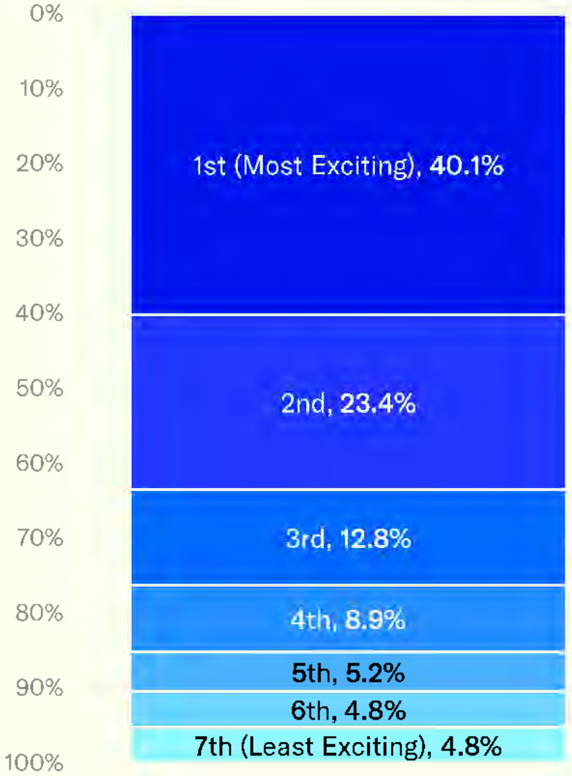
Interest in Visiting Sedona & Competitors

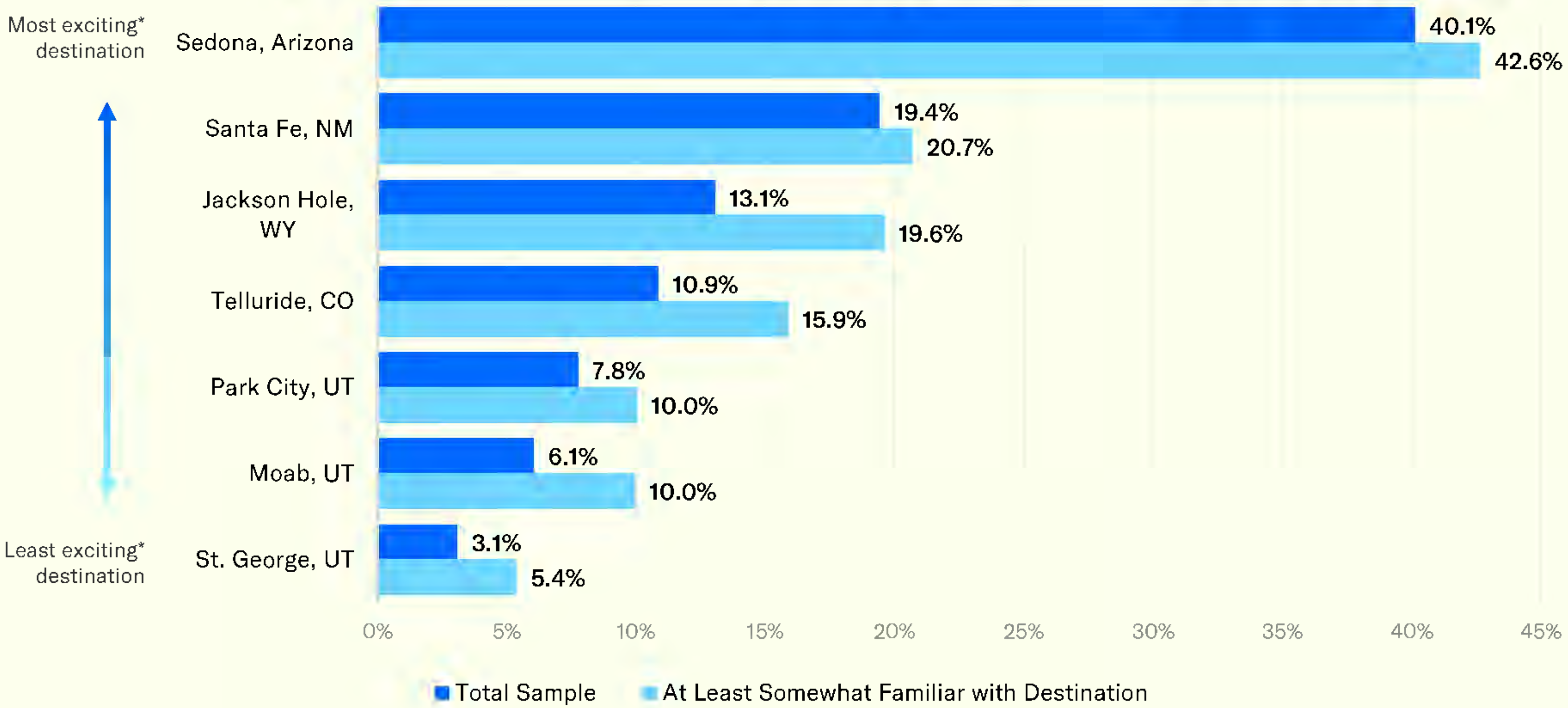


Question: How interested are you in visiting each of the following cities in the next 3 years? *Left side: Column segments represent % selecting the labeled response for Sedona.*
Right side: bar segments represent % selecting the response(s) indicated in the chart legend for the destination. *Level of interest defined by % of sample rating themselves as "very" or "extremely" interested in visiting the destination.
Base: Total respondents. 1,998 completed surveys.

Sedona tops excitement rankings, sustaining its competitive edge

When asking respondents to rank their excitement for Sedona and competitor destinations, Sedona emerges as the most exciting destination by far, indicating a flourishing potential for attracting new visitors. In fact, respondents rank Sedona as most exciting at double the rate of its closest competitor, Santa Fe, for which 1 in 5 respondents were most excited (19.4%). The excitement for Sedona likely reflects the successful branding and diverse experiences that resonate deeply with the travel aspirations of today's tourists.

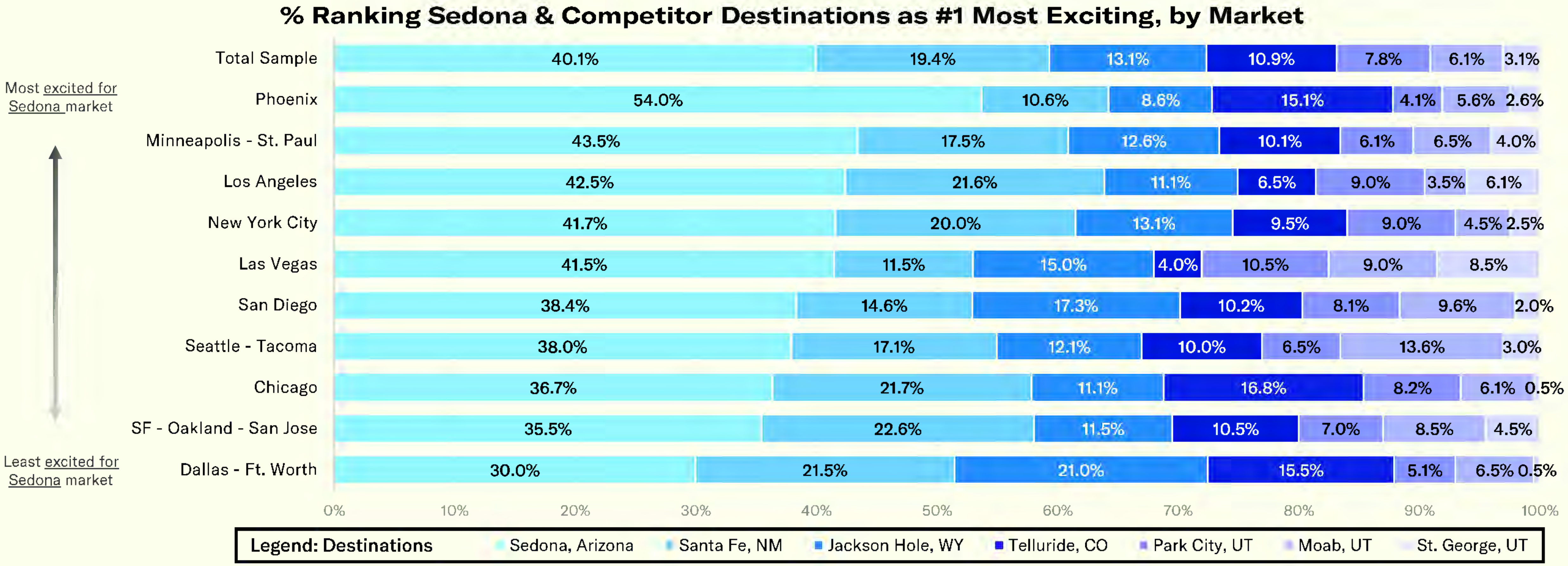




Question: How excited would you be to visit each destination? Rank them in order of most excited (1) to least excited (7). *Left Side: Bar segments represent % of sample selecting each ranking for Sedona; Right Side: Bars represent % of group ranking destination as #1.* *Level of exciting-ness defined by % of sample ranking destination as #1.
Base: Total respondents. 1,998 completed surveys.

Sedona's appeal stirs nationwide excitement as it reigns over its competitor set in all target markets

Sedona is the most exciting destination (i.e., most frequently ranked as #1 in exciting travelers) among its competitor set across all markets, sparking excitement from coast to coast. The varying levels of enthusiasm across cities in different regions highlight strategic opportunities for tailored outreach and positioning.



Question: How excited would you be to visit each destination? Rank them in order of most excited (1) to least excited (7). *Bar segments represent % of market sample rating destination as #1*
Base: Total respondents. 1,998 completed surveys. Per market: 200 respondents for every market except San Diego, where n = 198.

Open-Ended: Top Themes & Excerpts on Competitor Differentiators (1 of 2)

Jackson Hole, WY	Moab, UT	Park City, UT
Skiing	National Parks	Skiing and Snow Sports
Nature	Scenery	Mountains
Scenery	Arches	Scenery
Mountains	Outdoor Activities / Adventure	Ski Resorts
Grand Teton National Park	Mountains	
Yellowstone National Park		
• *"Great place for skiing and fall leave views."* • *"They have a lot of natural bodies of water that are clear and inviting."* • *"Great night life and stargazing"* • *"'Small airport town, lots of gift shops, very cute town"* • *"Its western ambiance and mountain range."* • *"Western vibes, fine dining and shopping, and winter activities"*	• *"It provides horse back riding, rock climbing, dinosaur trail walking and winery's."* • *"It's a gateway to massive red rock formations in Arches National Park."* • *"it's off roading terrain"* • *"Its natural landscape and best for skydiving."* • *'The people there friendly and welcoming* • *"It's an oasis of Mountain biking, hiking, rafting, off-road tours, climbing, canyoneering, jetboat tours, horseback riding,"*	• *"country town and skiing and Sundance festival"* • *"Lakes, Nightlife, food" / "Huge city with a lot of different foods to try"* • *"More festivals road trip type of vibe"* • *'Luxury ski town with beautiful scenery and homes to die for" / "'posh and well-known skiing"* • *"Home to two world class ski resorts where the rich & famous go to get away"* • *"The presence of the adorably nested ski town and walkable downtown street in park city"* • *"all the boutiques and small businesses"* • *"Skiing in the winter and mountain climbing in summer" / "Year-round outdoor activities"*
"I don't know/Unsure" count: 438 / 22% of sample	"I don't know/Unsure" count: 577 / 29% of sample	"I don't know/Unsure" count: 480 / 24% of sample

Question: Think about these destinations as places to visit for leisure. What makes each place unique/different?
Base: Total Respondents. 1,998 completed surveys.

Open-Ended: Top Themes & Excerpts on Competitor Differentiators (2 of 2)

Santa Fe, NM
Culture
Desert Landscape
Culinary Scene
Scenery
Art and Arts Scene
History
• *"It has the oldest known state capital in the US & artistic heritage."* • *"Influence of Native American culture, art, & architecture on the city"* • *"Hand crafted jewelry, art, wellness spas, historic sites, festivals & cultural events" / "Quirky and artsy"* • *"rich history, art scene, and unique blend of Pueblo, Spanish, and Mexican influences"* • *"Mexican cuisine" / "The food & music" / "Delicious texmex foods"* • *"Old West look and feel" / "high desert scenery"* • *"special architecture"/ "Ancient Pueblo Architecture"* • *"The nightlife and food" / "culture and nightlife"*
"I don't know/Unsure" count: 343 / 17% of sample

St. George, UT
Scenery
National Parks / Zion National Park
Outdoor Recreation
• *"Great mountain views." / "Sandstone cliffs and dunes" / "'Volcano and just different landscapes in such a small area" / "Unique geology"* • *"Gorgeous area and 55+ communities, on way to Utah national parks, near Vegas" / "Gateway to gorgeous Utah" / "First scenic city when traveling by car to Utah"* • *"Zion National Park, Lake Powell and Grand Canyon National Park are in close proximity with astounding beauty and recreation in a moderate climate area"* • *"Hiking trails & the Zion National Park."* • *"Environment friendly and welcoming"*
"I don't know/Unsure" count: 684 / 34% of sample

Telluride, CO
Skiing and Snow Sports
Mountains
Scenic Beauty / Beautiful Scenery
Ski Resorts
History / Former Mining Town
• *"It is one of the best ski resorts in Colorado." / "world-class skiing & snowboarding" / "Epic Ski runs"* • *"Best for winter lovers and skiing enthusiasts."* • *"Snow and pristine beauty all around"* • *"Colorado Rocky mountains in a box canyon by popular ski and golf resorts historic landmarks and Opera house and performing arts venue"* • *"Popular former mining town with great resorts" / "Victorian mining town with skiing resorts golf hiking" / "it's a box canyon in the rocky mountains and a former mining town"* • *"snow sports and film festival" / "They have a famous film festival every year."*
"I don't know/Unsure" count: 466 / 23% of sample

Question: Think about these destinations as places to visit for leisure. What makes each place unique/different?
Base: Total Respondents. 1,998 completed surveys.

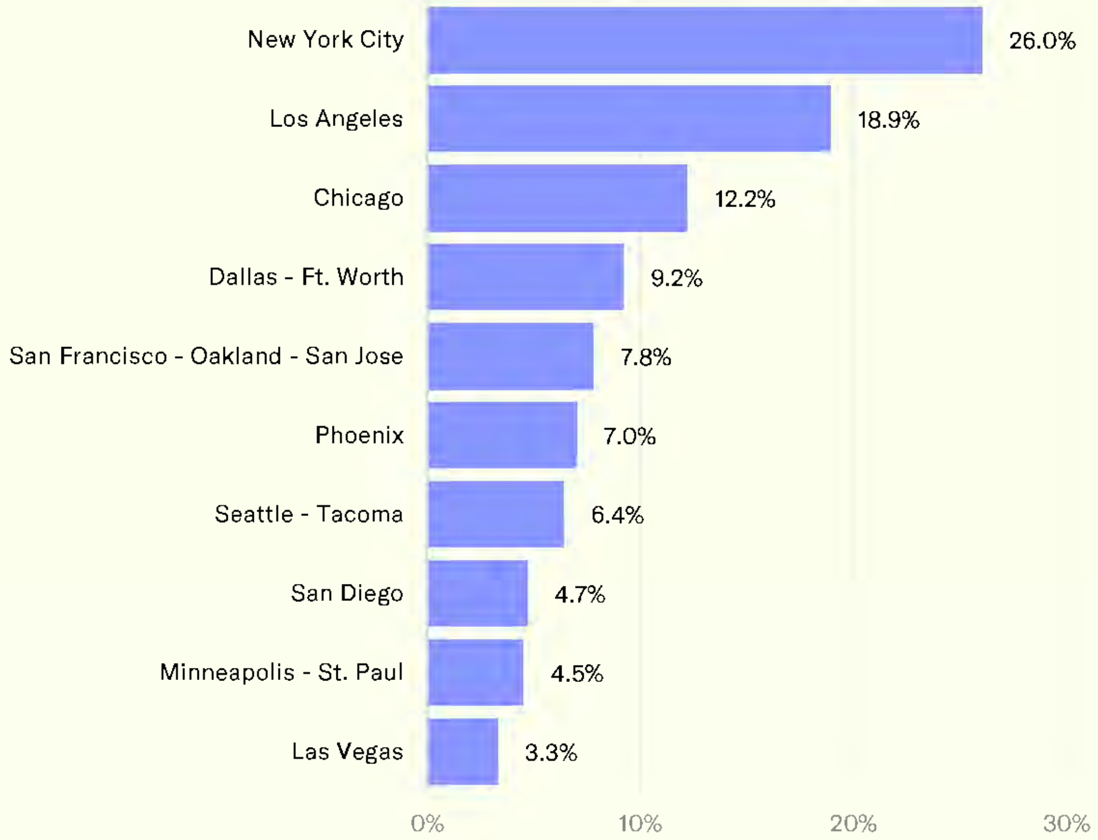
Profiles of Values-Aligned Travelers

- **Demographic & Psychographic Profiles of:**
  - **Leave-No-Trace Adherents**
  - **Sustainability Prioritizers**
  - **High-Value ($$) Travelers**

Demographic Profile of Leave-No-Trace Adherents

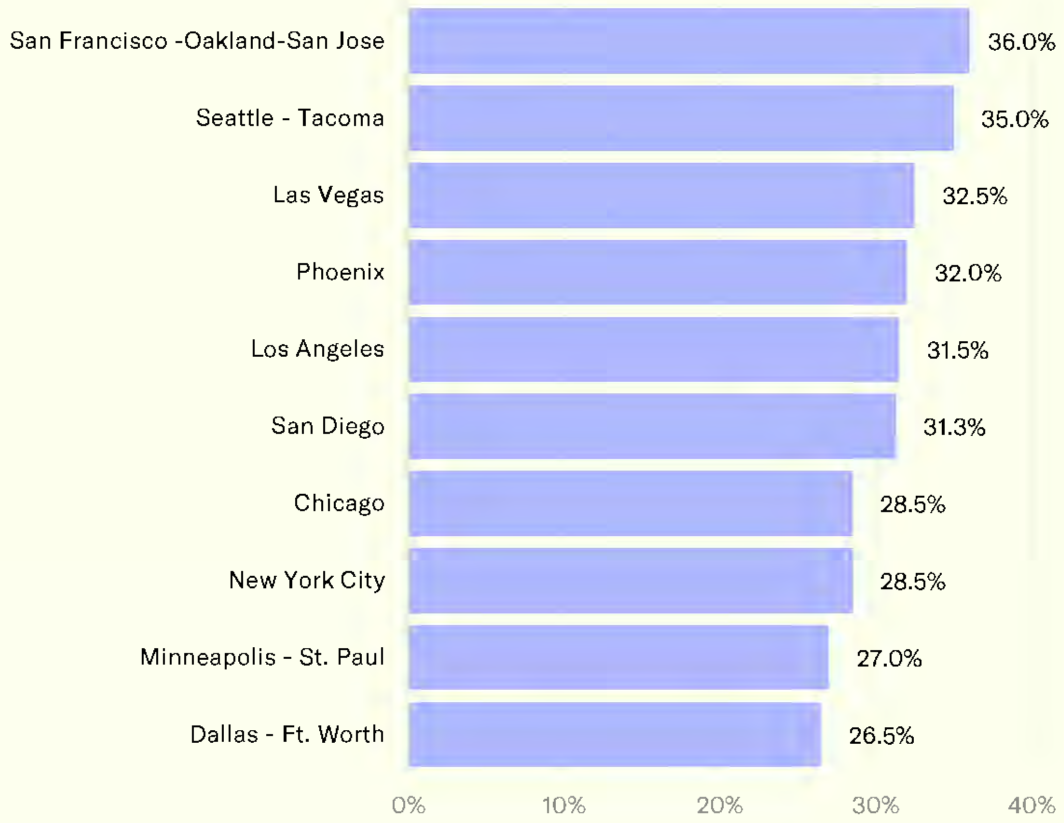
Leave-No-Trace Adherents are most likely to be from New York, with 26% of the persona residing in the NYC metropolitan area. The next most common origin market is Los Angeles, producing 18.9% of Leave-No-Trace Adherents. There are higher concentrations of Leave-No-Trace Adherents in the San Francisco and Seattle markets, with 36% and 35% of those areas' traveler residents, respectively, falling into the persona category.

Makeup of "Persona" Group by Origin Market
(Bars indicate % of persona group originating in market)



Base: Respondents who indicated high alignment ("5 – Describes me perfectly") with the statement: "It is important to practice leave no trace principles in the destinations I travel to." 617 completed surveys.

Rank Order of Origin Markets by % of Market Falling into This "Persona" (i.e., Align with "It is important to practice leave no trace principles in the destinations I travel to")
(Bars indicate % of market falling into persona group)

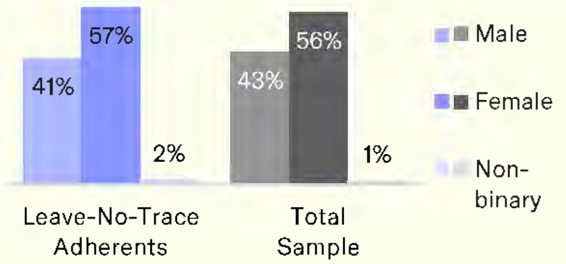


Base: Total respondents. 1,998 completed surveys. Per market: 200 respondents for every market except San Diego, where n = 198. *Bars represent % of market sample selecting "5 – Describes me perfectly" when asked how much the quoted statement describes them.*

Demographic Profile of Leave-No-Trace Adherents

"It is important to practice leave no trace principles in the destinations I travel to."

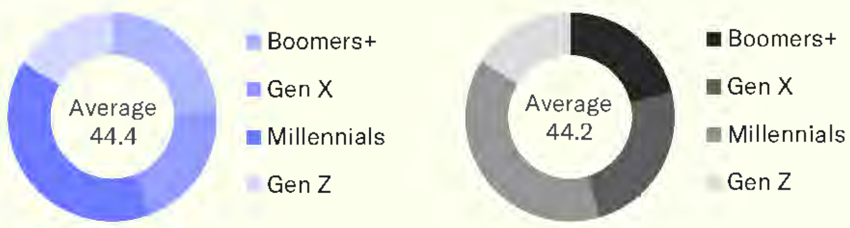
Gender



Leave-No-Trace Adherents have a nearly identical gender breakdown as the overall target market, and most Leave-No-Trace Adherents are women.

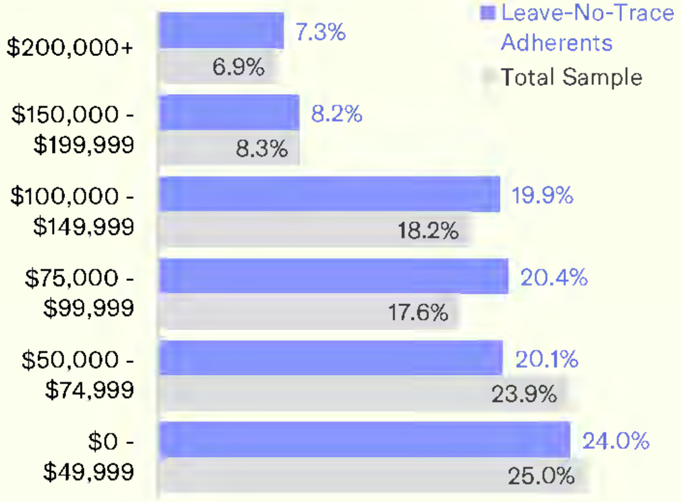
Generation

Leave-No-Trace Adherents **Total Sample**



Leave-No-Trace Adherents have a comparable age breakdown and nearly identical average age as the overall target market, and a plurality are Millennials.

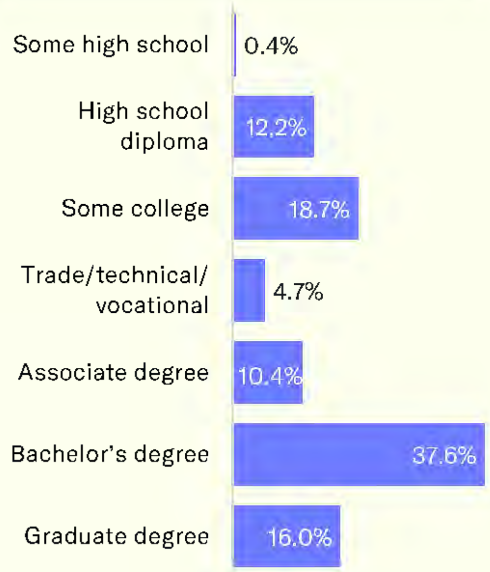
Annual Household Income



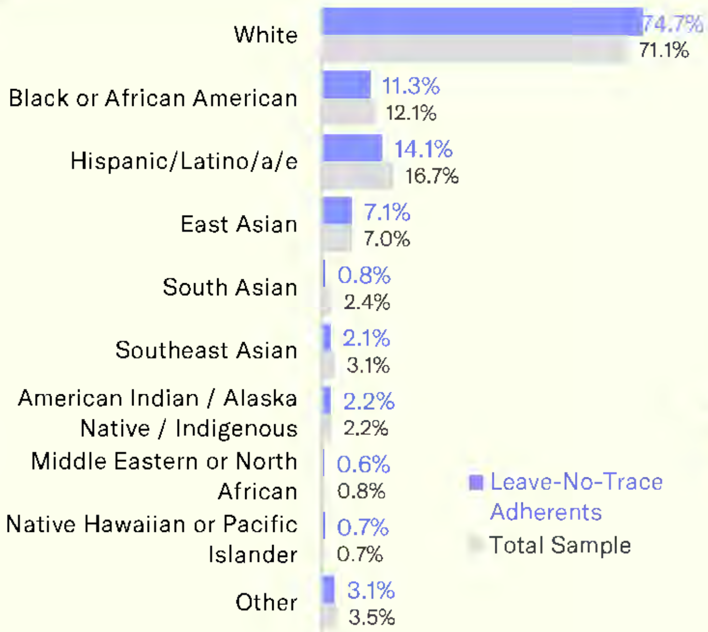
Average Estimated Annual **HHI:** $90,352

Average **Travel Budget** for next 12 Months: $4,943

Educational Status



Racial/Ethnic Identity



Leave-No-Trace Adherents have a comparable racial makeup as the overall target market.

Has Children <18 yo

24.9%

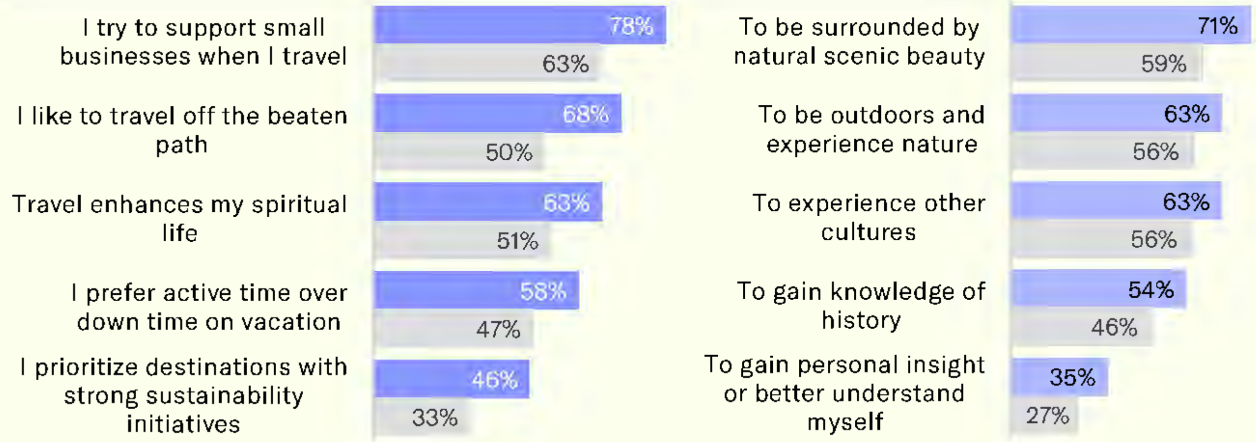
of Leave-No-Trace Adherents have children under the age of 18

Base: Respondents who indicated high alignment ("5 – Describes me perfectly") with the statement: "It is important to practice leave no trace principles in the destinations I travel to." 617 completed surveys.

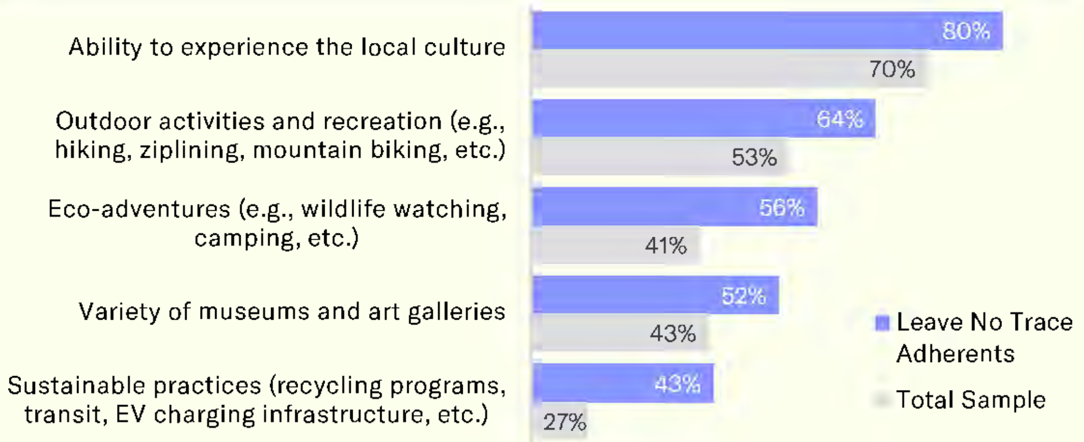
Psychographic Profile of Leave-No-Trace Adherents

"It is important to practice leave no trace principles in the destinations I travel to."

Most Differentiated Psychographics & Motivators



Most Differentiated Destination Priorities

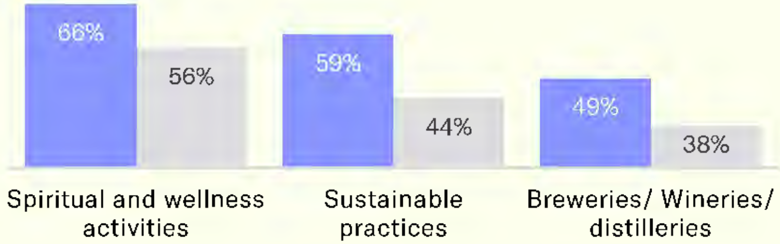


Sedona Satisfaction & Differentiated Destination Attribute Appraisals

86% of past-visitor Leave-No-Trace Adherents **were very or extremely satisfied** with their experience (N=279)

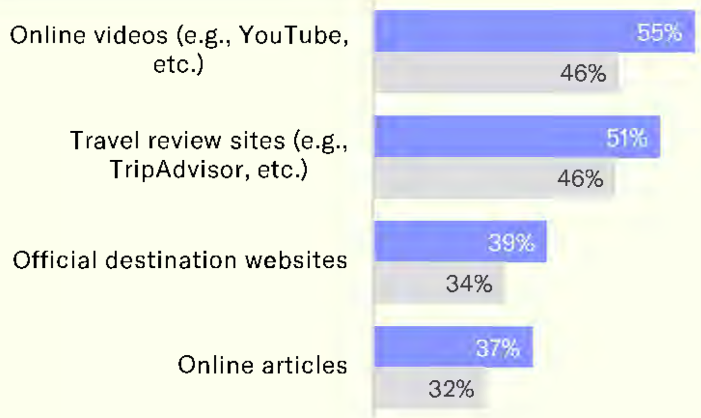
9.0%↑ vs. total sample

(45% extremely satisfied = 11%↑ vs. total sample)

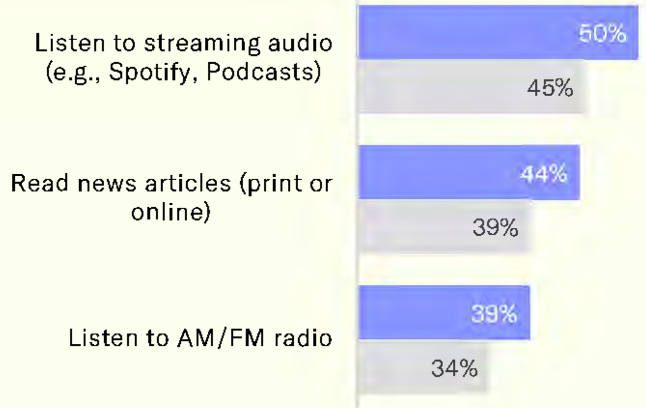


% rating Sedona "Good" or "very Good" at delivering on attribute

Differentiated Travel Inspiration Resources



Differentiated Media Usage Patterns



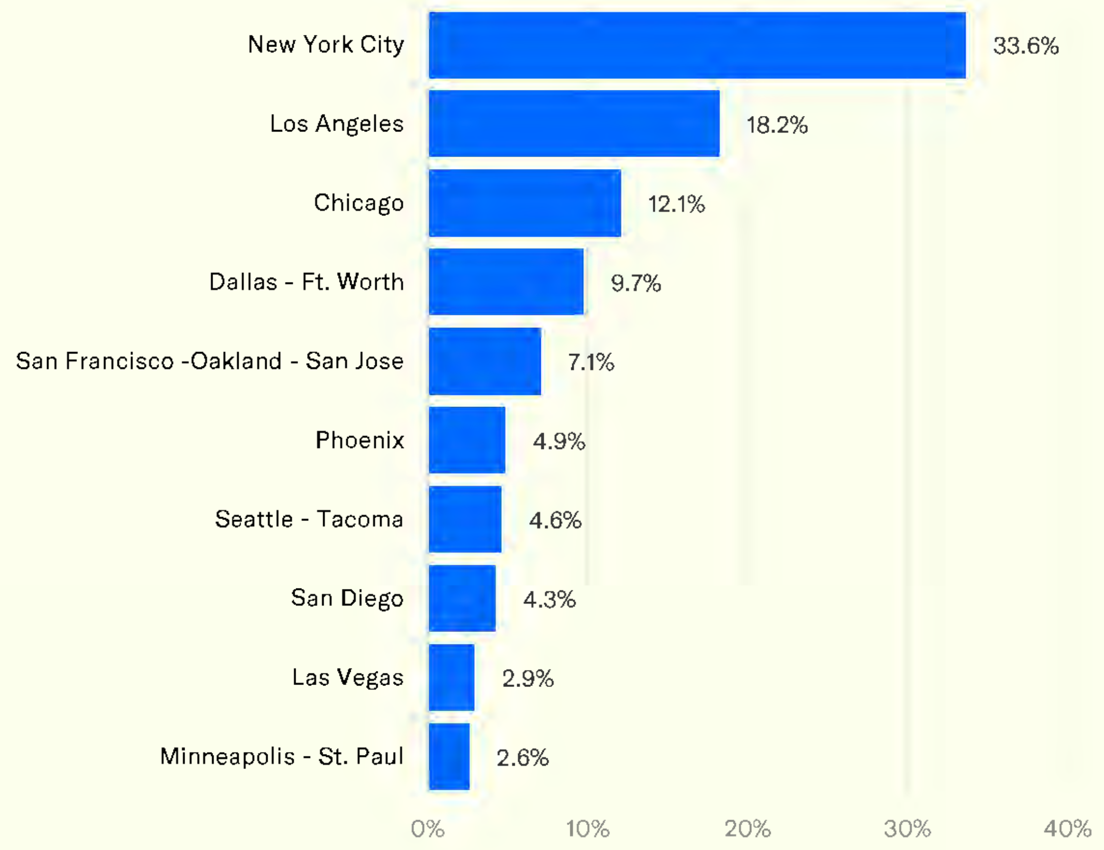
Base: Respondents who indicated high alignment ("5 – Describes me perfectly") with the statement: "It is important to practice leave no trace principles in the destinations I travel to." 617 completed surveys.

Demographic Profile of Sustainability Prioritizers

Like Leave-No-Trace Adherents, Sustainability Prioritizers are most likely to be from New York at a rate of 1 in 3 Sustainability Prioritizers (33.6%), and least likely to be from Las Vegas (2.9%) and Minneapolis (2.6%). New Yorkers also has the greatest concentration of Sustainability Prioritizers: 40% of respondents from New York were categorized as such, followed by San Francisco (35.5%) and Los Angeles (33.0%). The Minneapolis market has the lowest concentration of Sustainability Prioritizers (17.0%).

Makeup of "Persona" Group by Origin Market

(Bars indicate % of persona group originating in market)

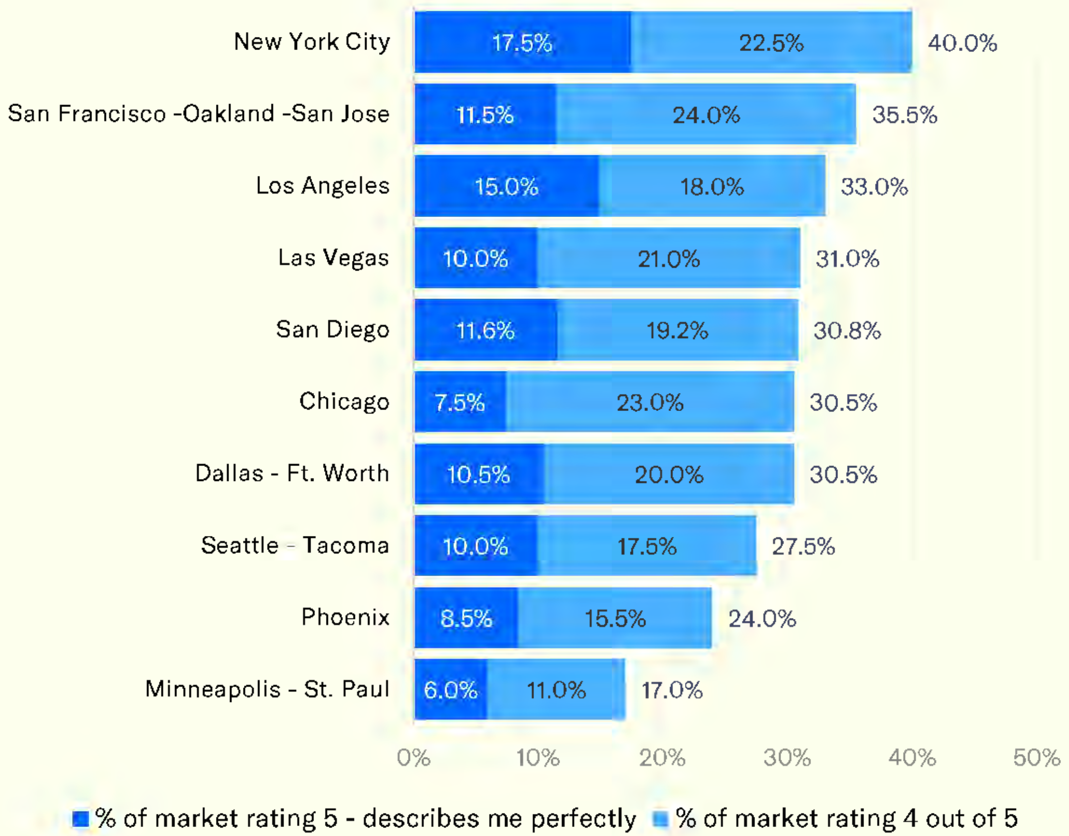


Base: Respondents who indicated high alignment (4 or 5 out of 5) with the statement: "I prioritize visiting places with strong sustainability initiatives." 599 completed surveys.

Rank Order of Origin Markets by % of Market Falling into This "Persona"

(i.e., Self-describe as "I prioritize visiting places with strong sustainability initiatives")

(Bars indicate % of market falling into persona group)

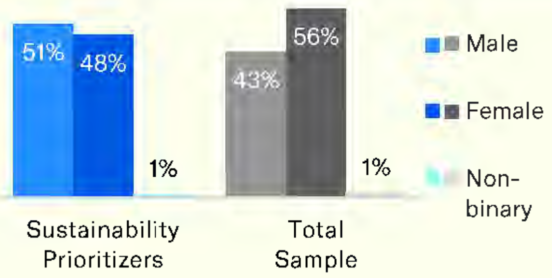


Base: Total respondents. 1,998 completed surveys. Per market: 200 respondents for every market except San Diego, where n = 198. *Bar segments represent % of market sample selecting rating as indicated in chart legend.*

Demographic Profile of Sustainability Prioritizers

"I prioritize visiting places with strong sustainability initiatives."

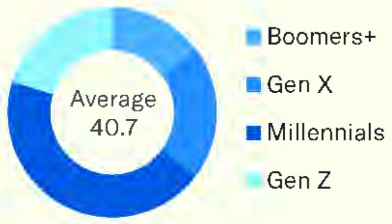
Gender



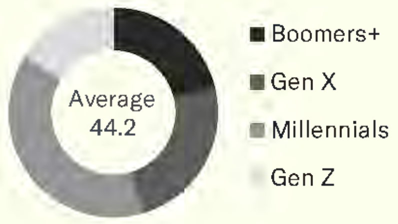
Men make up a greater proportion of Sustainability Prioritizers compared to the overall target market, and most Sustainability Prioritizers are men (just over half), while most of the overall target market are women.

Generation

Sustainability Prioritizers

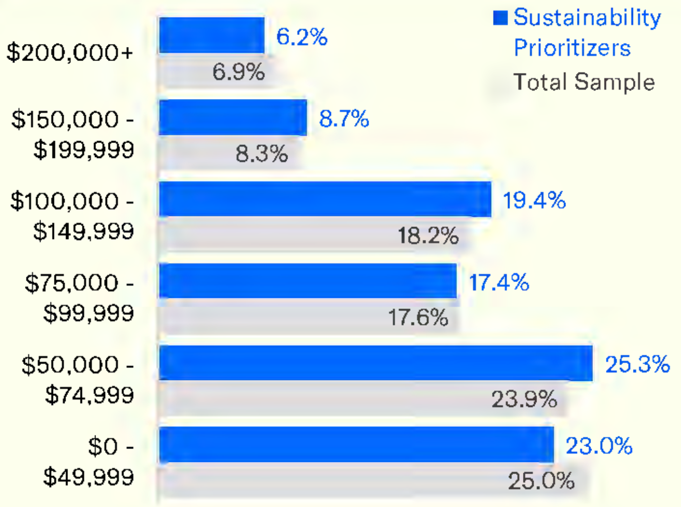


Total Sample



Sustainability Prioritizers are younger compared to the overall target market.

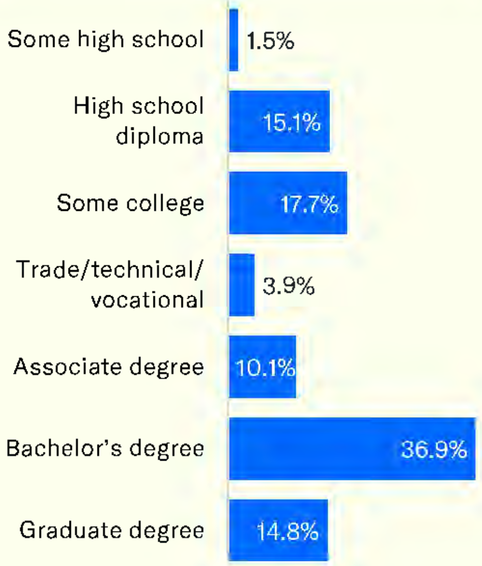
Annual Household Income



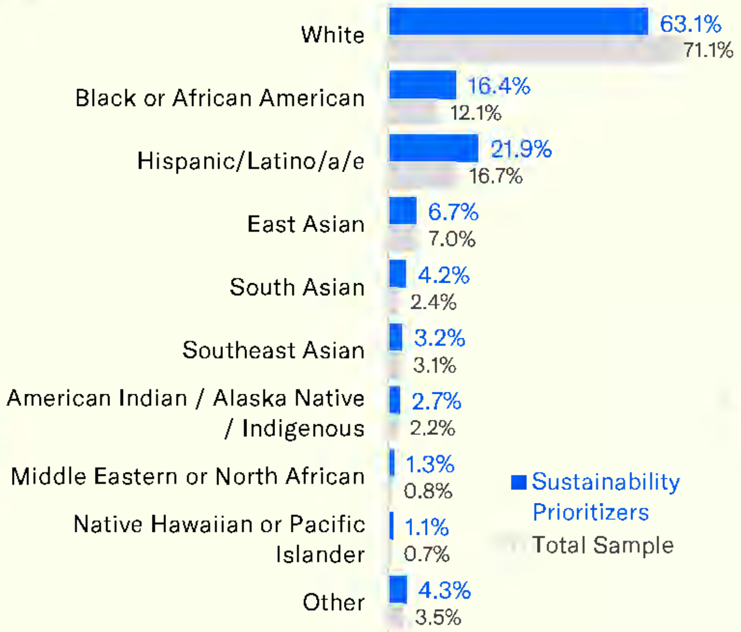
Average Estimated **Annual HHI:** $88,561

Average **Travel Budget** for next 12 Months: $4,654

Educational Status



Racial/Ethnic Identity



Sustainability Prioritizers are significantly less likely to be White and more likely to be Black or Hispanic than the overall target market.

Has Children <18 yo

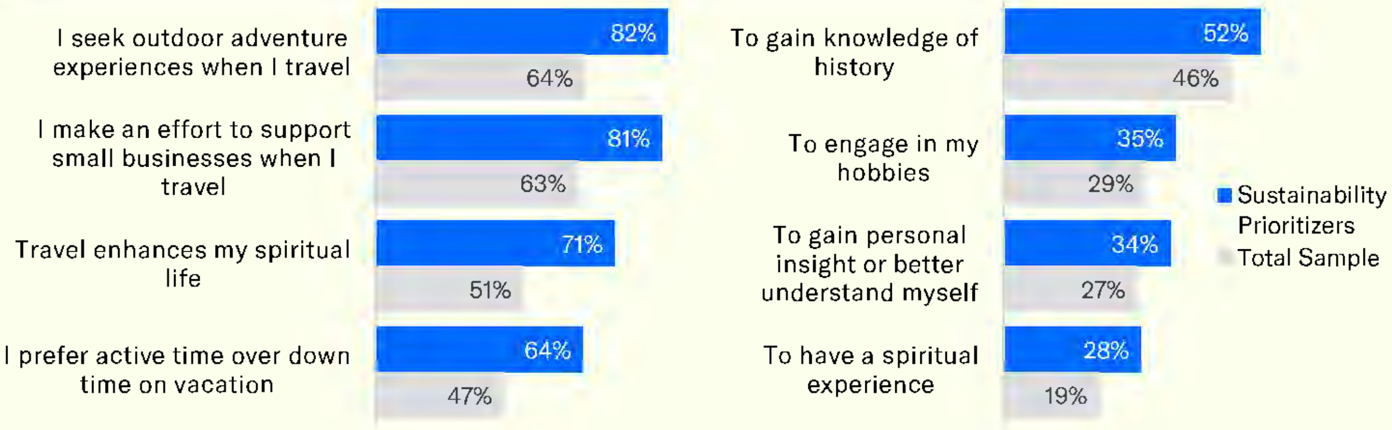
Sustainability Prioritizers are more likely to be parents of minors (31.2%) than the overall target market (25.0%).

Base: Respondents who indicated high alignment (4 or 5 out of 5) with the statement: "I prioritize visiting places with strong sustainability initiatives." 599 completed surveys.

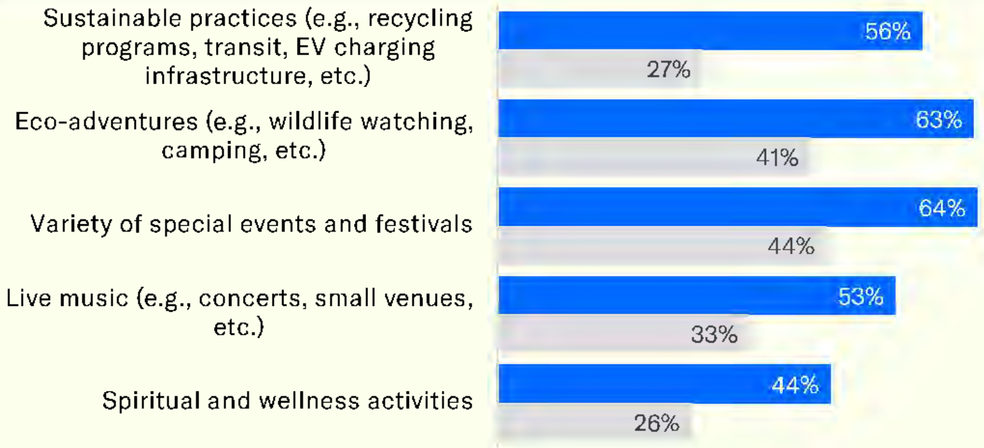
Psychographic Profile of Sustainability Prioritizers

"I prioritize visiting places with strong sustainability initiatives."

Most Differentiated Psychographics & Motivators



Most Differentiated Destination Priorities



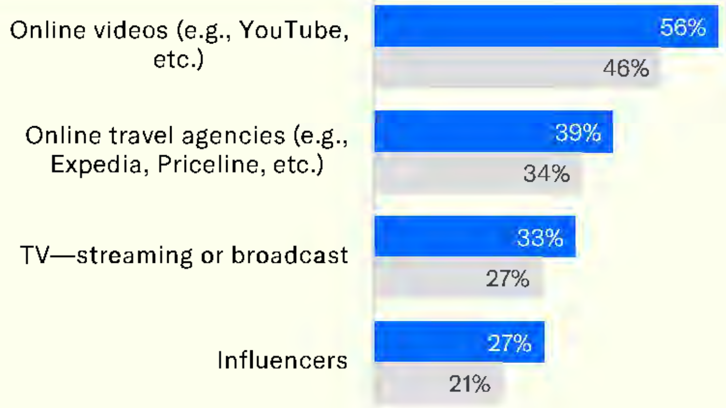
Sedona Satisfaction & Differentiated Destination Attribute Appraisals

of past-visitor Sustainability Prioritizers were **very or extremely satisfied** with their experience (N=286)

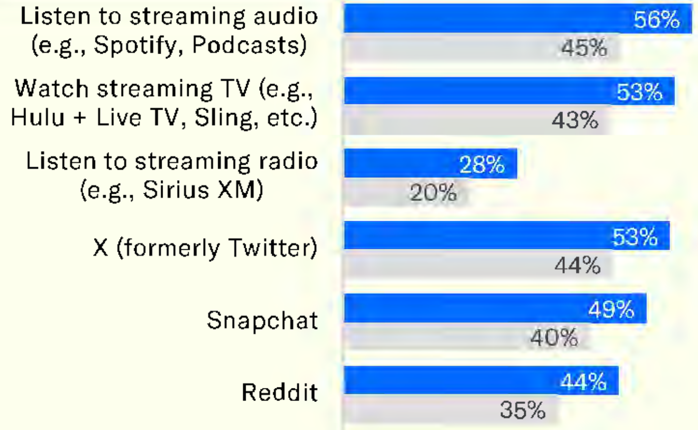
41% extremely satisfied = 7%↑ vs. total sample

% rating Sedona "Good" or "very Good" at delivering on attribute

Differentiated Travel Inspiration Resources



Differentiated Media Usage Patterns



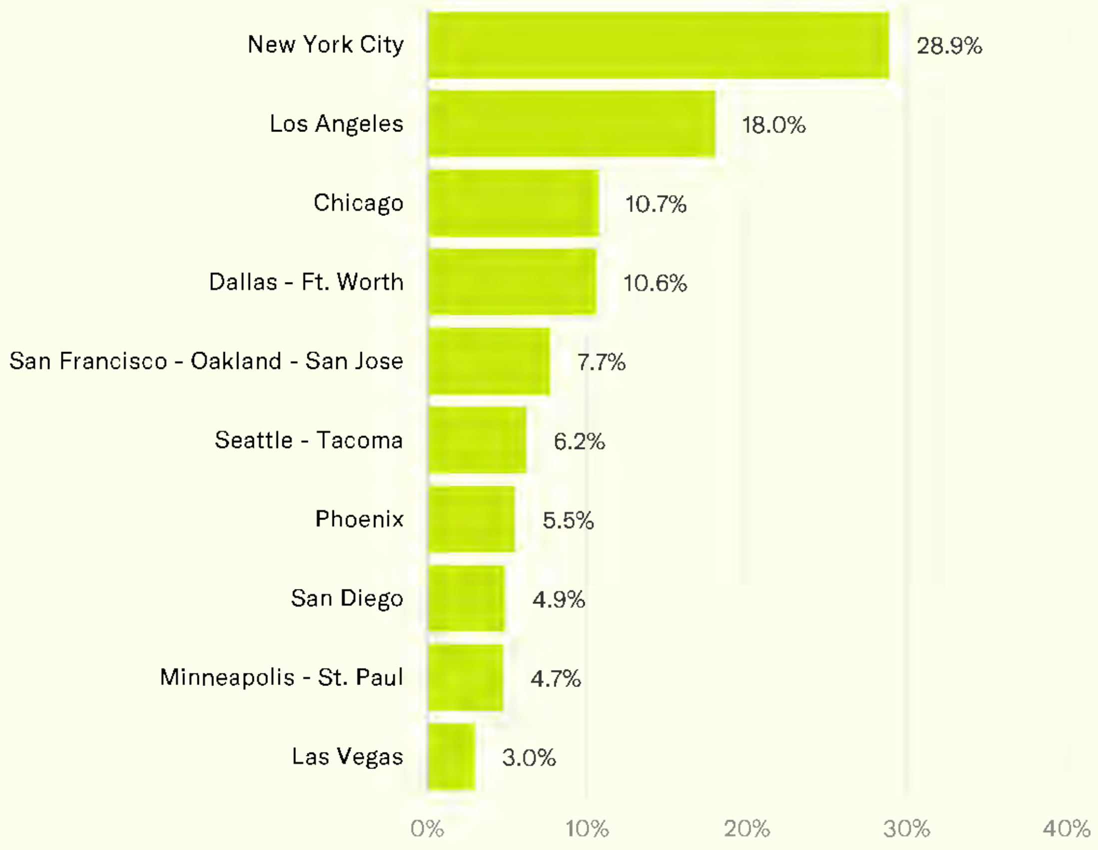
Base: Respondents who indicated high alignment (4 or 5 out of 5) with the statement: "I prioritize visiting places with strong sustainability initiatives." 599 completed surveys.

Demographic Profile of High-Value Travelers

High-Value Travelers are by far most likely to be from New York City, which is the top producer of travelers in general among markets tested due to its sheer size (representing 27.4% of the weighted sample). However, it is topped by San Francisco and Seattle in terms of concentration of High-Value Travelers (43.6% and 43.5%, respectively, vs. 40.7% NYC. Las Vegas residents are least likely to be high-value travelers (i.e., having travel budgets of more than $5,000 for the next 12 months).

Makeup of "Persona" Group by Origin Market

(Bars indicate % of persona group originating in market)

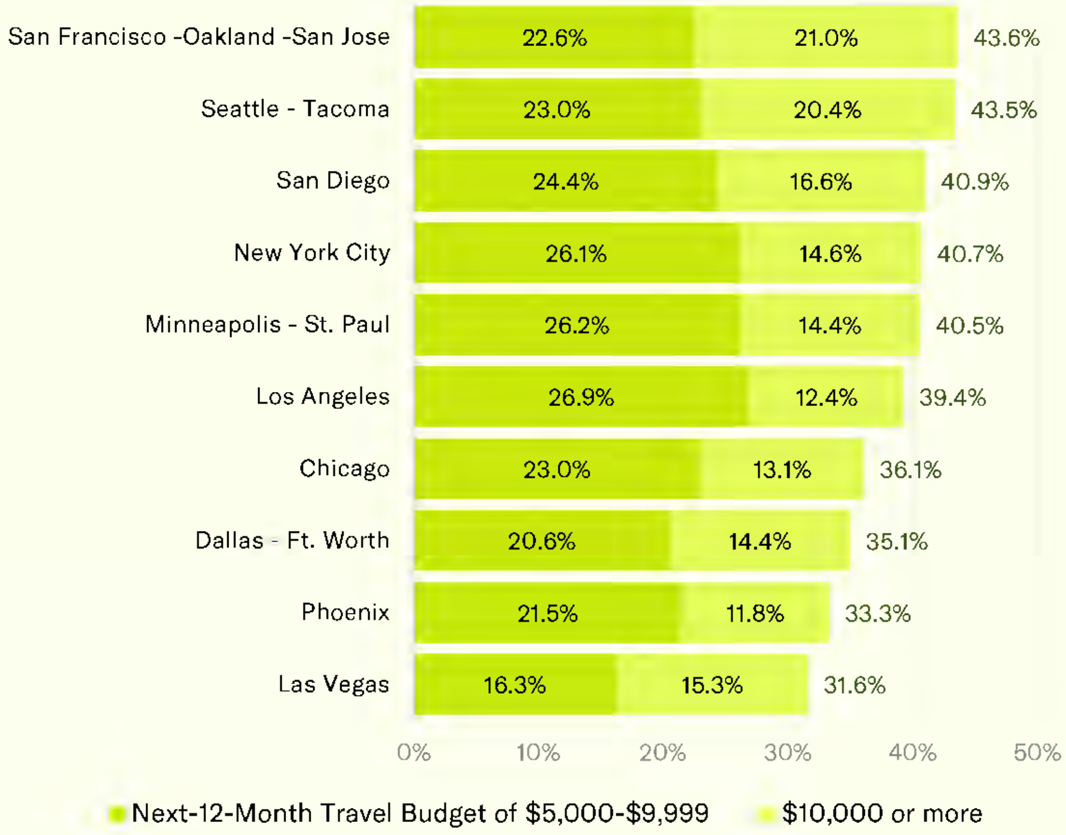


Base: Respondents who have a travel budget for the next 12 months of $5,000 or more, placing them in roughly the top quartile of the sample. 532 completed surveys.

Rank Order of Origin Markets by % of Market Falling into This Group

(i.e., Have a travel budget for the next 12 months of $5,000 or more)

(Bars indicate % of market falling into persona group)

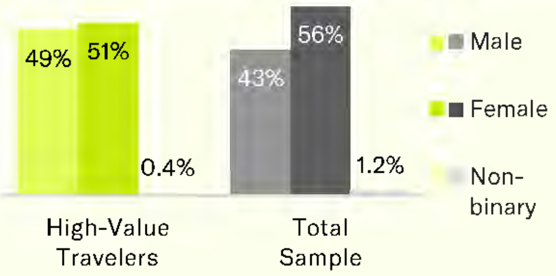


Base: Total respondents. 1,998 completed surveys. Per market: 200 respondents for every market except San Diego, where n = 198. *Bar segments represent % of market sample reporting budget within range as indicated in chart legend.*

Demographic Profile of High-Value Travelers

Travelers above the 75th percentile in terms of travel budget ($5,000+)

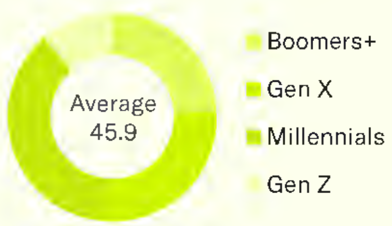
Gender



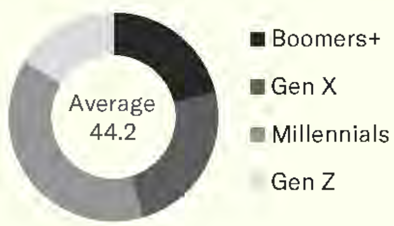
Men make up a greater proportion of High-Value Travelers compared to the overall target market, but most High-Value Travelers are women (just over half), like the overall target market.

Generation

High-Value Travelers



Total Sample



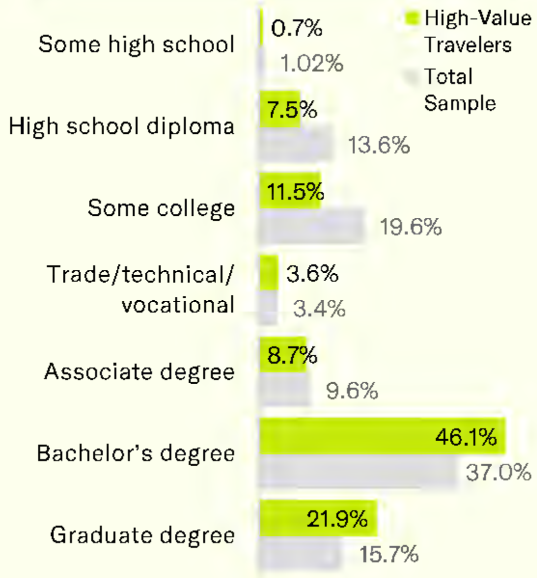
On average, High-Value Travelers are significantly older compared to the overall target market.

Annual Household Income

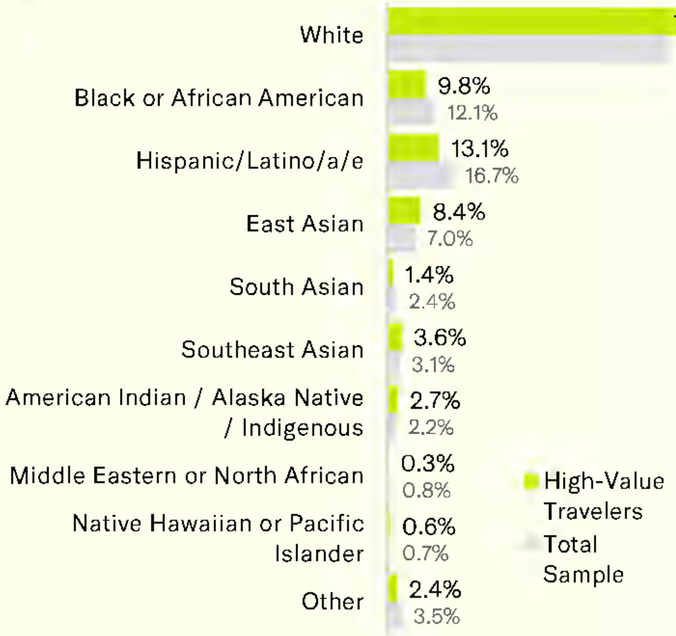
Average Estimated Annual **HHI**: $120,389

Average **Travel Budget** for next 12 Months: $10,627

Educational Status



Racial/Ethnic Identity



High-Value Travelers have a comparable racial makeup as the overall target market.

Has Children <18 yo

High-Value Travelers are more likely to be parents of minors (31.6%) than the overall target market (25.0%).

Base: Respondents who have a travel budget for the next 12 months of $5,000 or more, placing them in roughly the top quartile of the sample. 532 completed surveys.

Psychographic Profile of High-Value Travelers

Travelers above the 75th percentile in terms of travel budget ($5,000+)

Most Differentiated Psychographics & Motivators

	High-Value Travelers	Total Sample
I make an effort to support small businesses when I travel	69%	63%
I travel to splurge on myself	64%	56%
It is important to practice leave no trace principles in the destinations I travel to	64%	58%
I like to travel off the beaten path	56%	50%
To experience other cultures	66%	56%
To learn about a new culture	63%	51%
To gain knowledge of history	56%	46%
To connect with my significant other	53%	42%

Most Differentiated Destination Priorities

	High-Value Travelers	Total Sample
Outdoor activities and recreation (e.g., hiking, ziplining, mountain biking, etc.)	57%	53%
Fine dining	47%	41%
Variety of museums and art galleries	46%	43%
Breweries/ Wineries/ Distilleries	33%	28%

Sedona Satisfaction & Differentiated Destination Attribute Appraisals

79% of past-visitor Sustainability Prioritizers were **very** or **extremely satisfied** with their experience (N=262)

29% extremely satisfied = 6%↓ vs. total sample

	High-Value Travelers	Total Sample
Spiritual and wellness activities	61%	56%
Sustainable practices	51%	44%
Golf	35%	30%

% rating Sedona "Good" or "very Good" at delivering on attribute

Differentiated Travel Inspiration Resources

	High-Value Travelers	Total Sample
Travel review sites (e.g., TripAdvisor, etc.)	60%	46%
Official destination websites	44%	34%
Online travel agencies (e.g., Expedia, Priceline, etc.)	42%	34%
Online articles	40%	32%
Travel planning apps	28%	19%

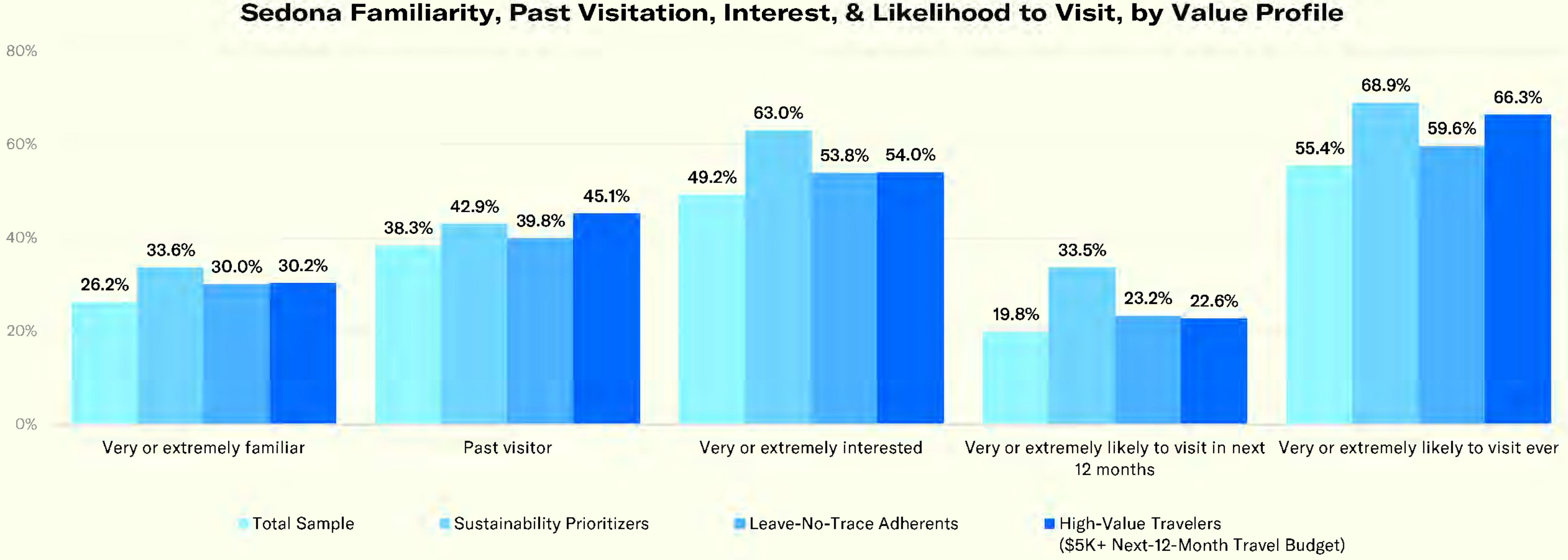
Differentiated Media Usage Patterns

	High-Value Travelers	Total Sample
Read news articles (print or online)	48%	39%
Watch traditional cable TV	44%	39%
Listen to AM/FM radio	39%	34%
X (formerly Twitter)	48%	44%

Base: Respondents who have a travel budget for the next 12 months of $5,000 or more, placing them in roughly the top quartile of the sample. 532 completed surveys.

Sustainability Prioritizers show more interest and likelihood to visit Sedona in the near term than other groups of interest

Compared to the total sample; travelers who follow leave no trace principles; and those with high travel budgets; visitors who prioritize visiting places with strong sustainability initiatives are more drawn to Sedona, despite their slightly lower visitation rate compared to High-Value Travelers. Sustainability Prioritizers are much more inclined to have an intention to visit within the next 12 months, at a rate of 33.5%, compared to 23.2% for the next most likely group (Leave-No-Trace Adherents).



Base: Total respondents. 1,998 completed surveys. *Columns represent % of sample / group falling into categories due to selected responses to key questions, as indicated in chart legend.*
Base: Per group: Sustainability Prioritizers – 599 respondents; Leave-No-Trace Adherents – 617 respondents; High-Value Travelers – 532 respondents

Respondent Origins & Demographics

Demographics

Gender

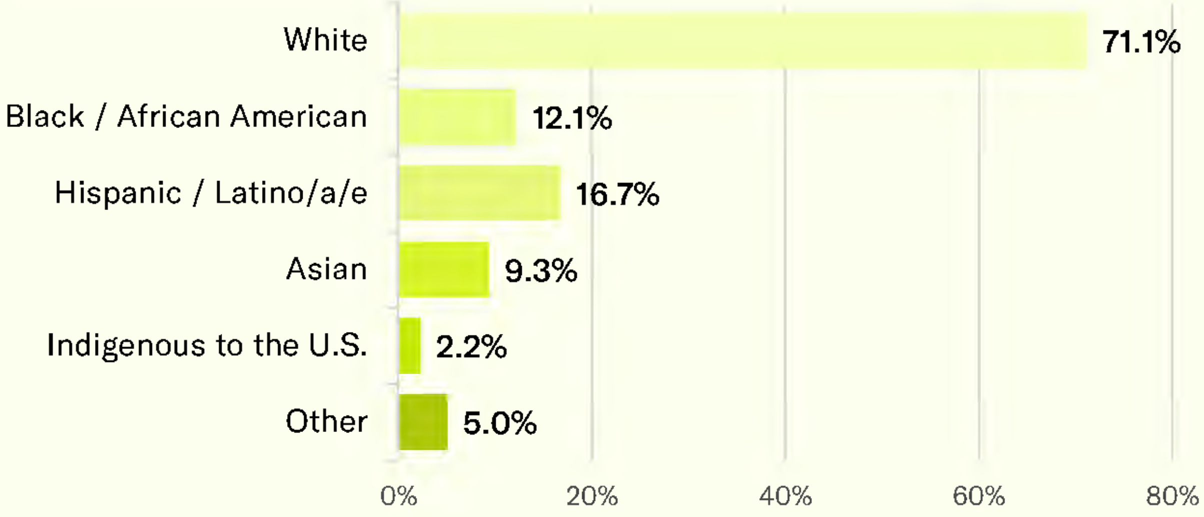
- Men, **42.9%**
- Women, **55.8%**
- Non-binary/Non-conforming, **1.2%**

Generation

- Boomers or older, **21.3%**
- Gen X, **24.2%**
- Millennials, **38.5%**
- Gen Z, **15.9%**

Mean Age = **44.2** years old

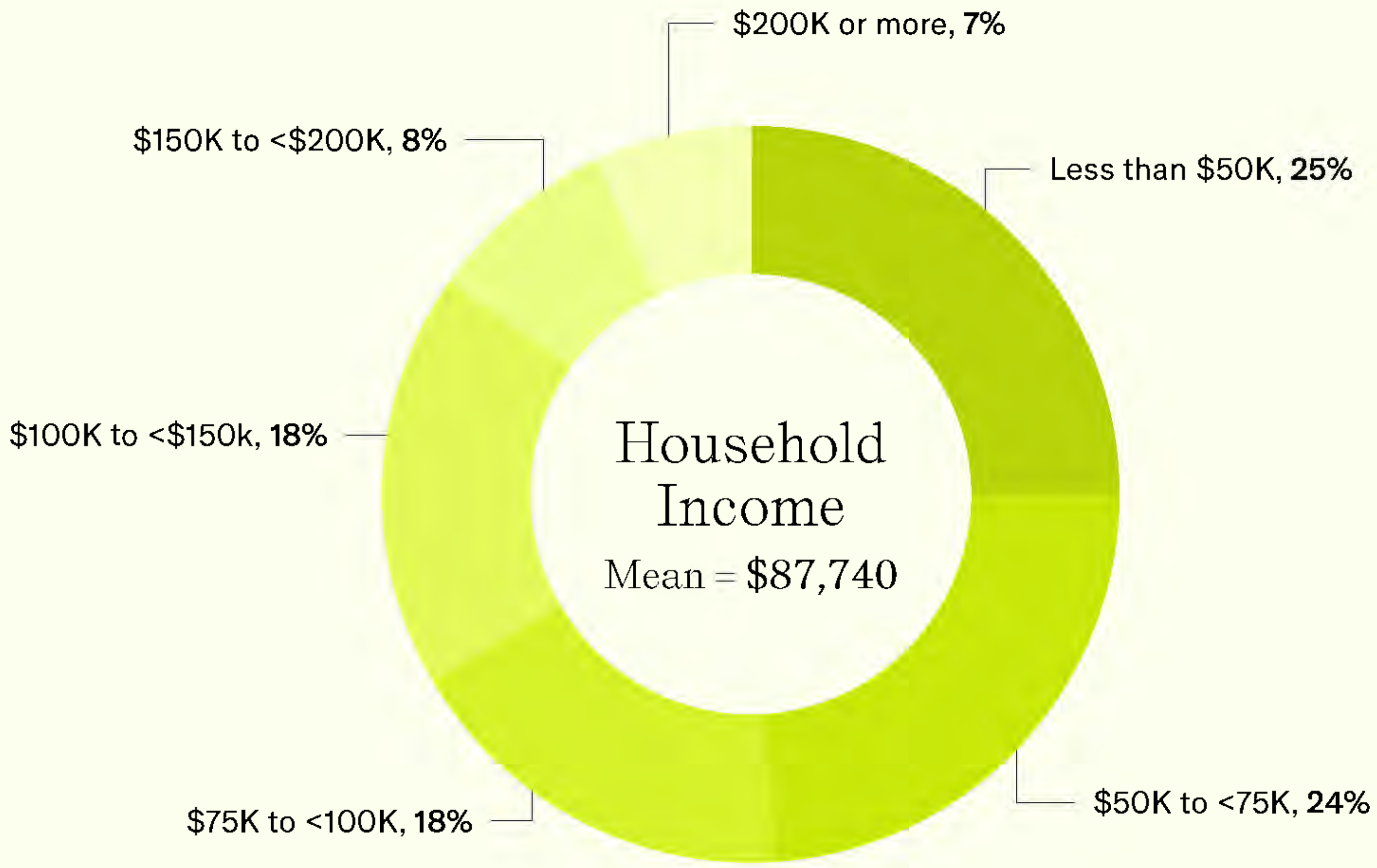
Racial Identity

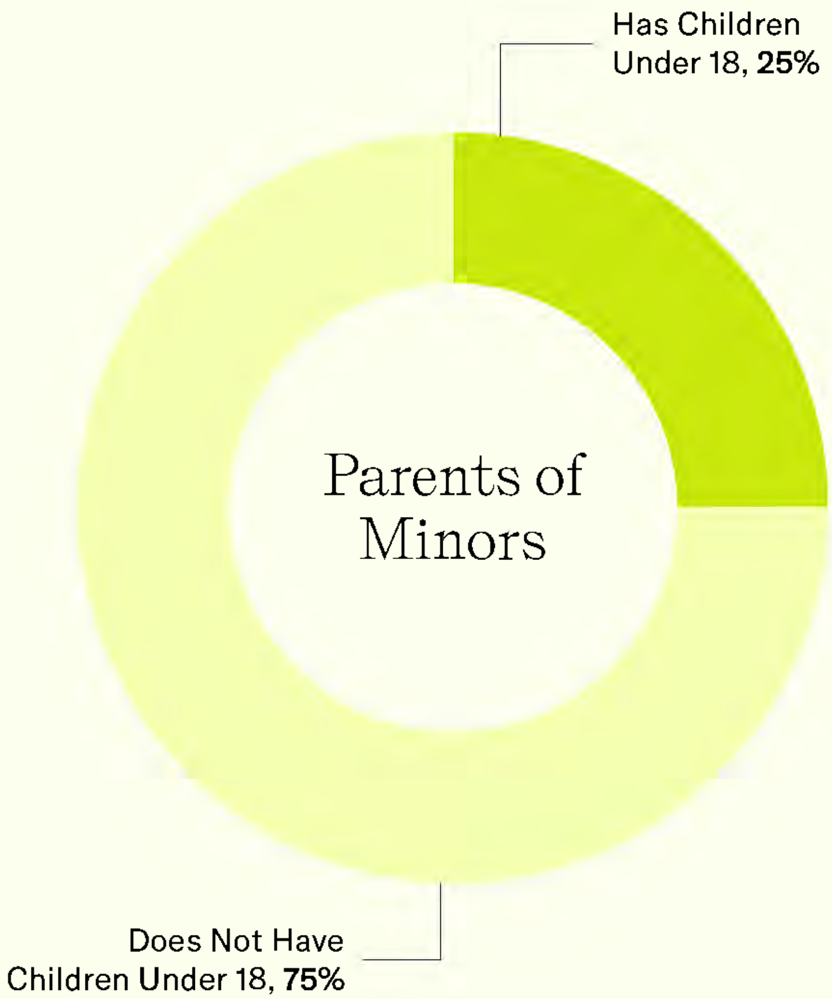


Sexual Orientation

- Heterosexual, **89.0%**
- Bisexual, **6.0%**
- Gay, **1.9%**
- Lesbian, **1.6%**
- Queer, **1.0%**
- Other, **0.6%**

Demographics





SEDONA VISITOR SENTIMENT SURVEY – 2023/24

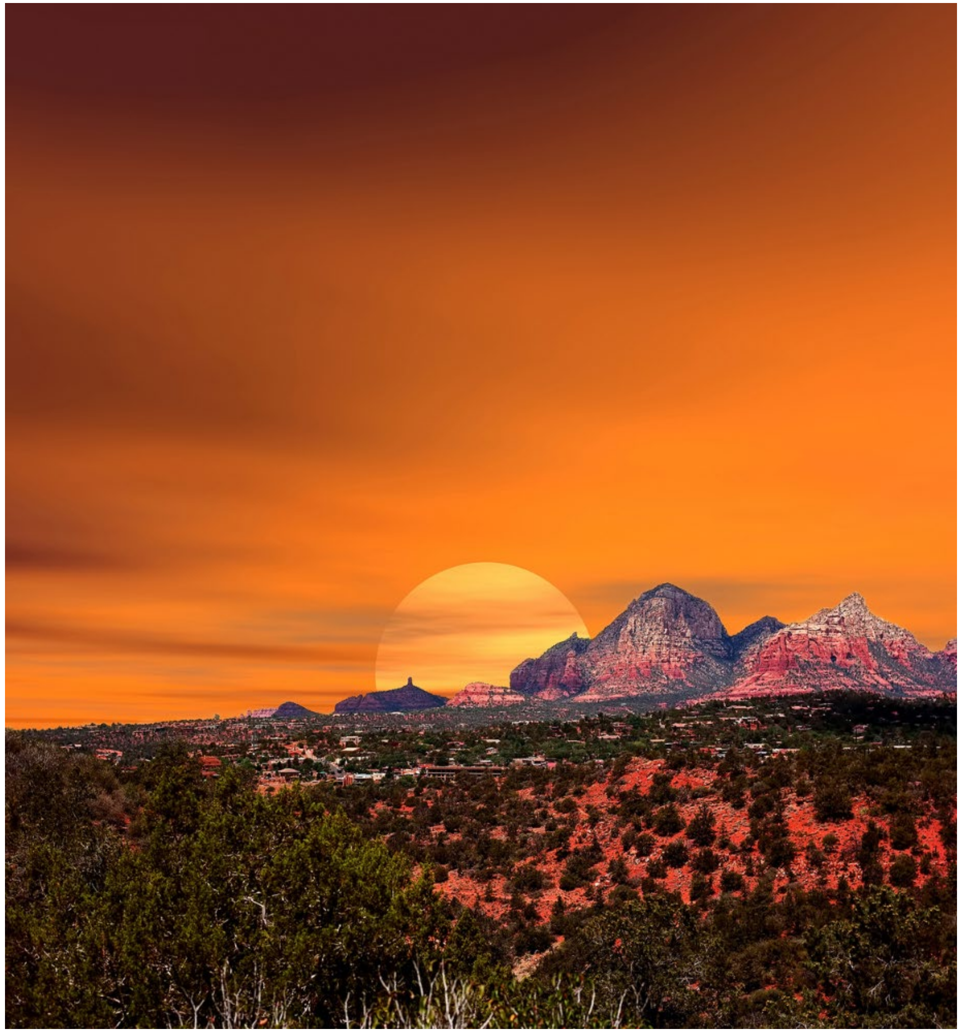
TABLE OF CONTENTS

INTRODUCTION

The visitor intercept research was conducted to gauge overall visitor perceptions of Sedona.

Other goals included capturing a profile of visitors and learning about the trip characteristics of their time in Sedona. Specific information sought included:

- Demographics and origin of visitors
- Length of stay
- Types of accommodations
- Activities during their stay
- Spending on dining, tours and retail shopping
- Visitor Center usage when traveling



METHODOLOGY

RRC hired a team of local interviewers to survey visitors in key locations around the city from December 11, 2023 to January 6, 2024. Intercept areas included:

- Tlaquepaque
- Uptown
- Airport
- Area Trailheads
- Whole Foods

During the four weeks of research, the team intercepted 647 people in the area:

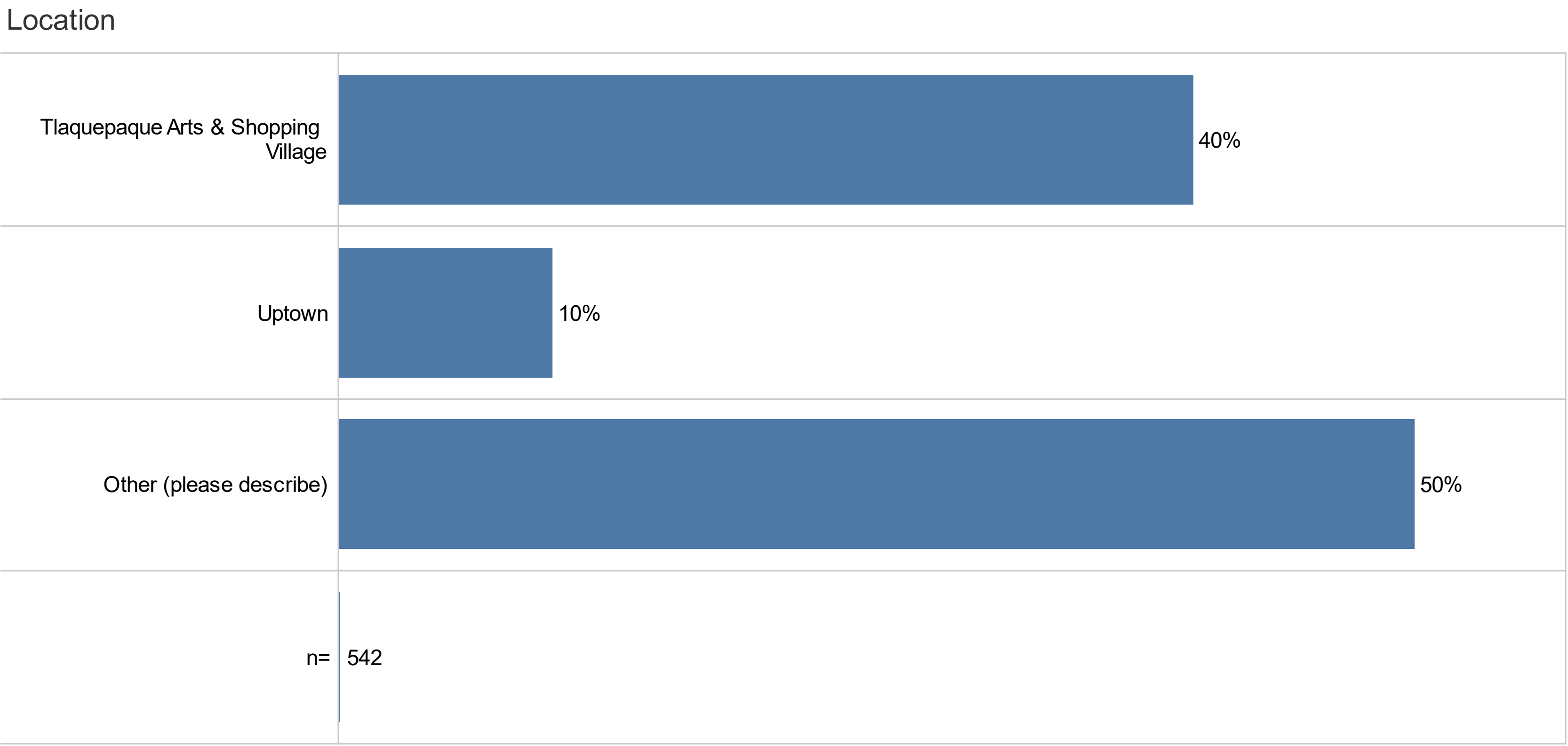
- 582 visitors to Sedona
- 52 local residents
- 13 second homeowners

Local and seasonal residents were thanked for their time and the survey was terminated. This report focuses on information gathered from visitors to Sedona.

647 TOTAL INDIVIDUALS SURVEYED

INTERVIEWER LOCATION

40% of respondents were interviewed in the Tlaquepaque area and 10% of interviews were in Uptown. Other survey locations included the airport, Whole Foods, Red Rock Trail, and various trailheads.



Source: RRC

KEY FINDINGS

KEY FINDINGS

90

Visitors have strong positive feelings toward Sedona. They awarded the city a Net Promoter Score (NPS) of 90. Note this is extremely high for a leisure destination. The positive NPS was reinforced by a satisfaction rating of 4.8 on a 1-5 scale.

All aspects of Sedona are highly rated. Trails, small town charm, friendliness and customer service topped the list. Visitors clearly feel welcome in Sedona. Getting around town was the lowest ranked attribute but still garnered a favorable 4.5 rating on a scale of 1-5.

Nearly 80% of visitors during the holiday period were from out of state. California was the largest contributor with large numbers from Los Angeles, San Diego and San Francisco in town. Predictably, most Arizona visitors (69%) were from the Phoenix area. International visitors accounted for 10% of respondents. Half of those were Canadian.

KEY FINDINGS

While most visitors interviewed were on their first trip to Sedona, those who have been before come back often. On average, repeat visitors were on their seventh trip to the area. Overnight visitors averaged just over 4 nights staying in Sedona.

Enjoying the scenery was the top activity followed closely by hiking, dining, and shopping. Nearly three-quarters of visitors said they went hiking during their visit to Sedona.

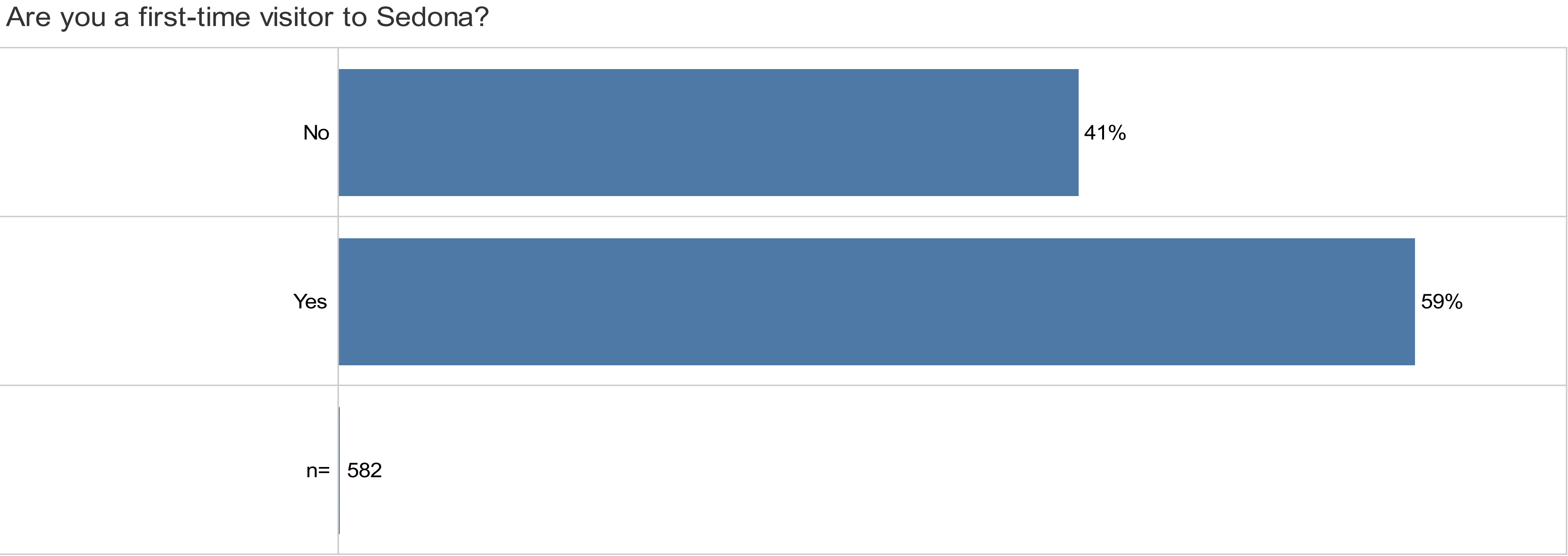
Tourism spending is significant in Sedona. On average, visitors spend over $100 per day on dining and nearly $50 on shopping. Tours and excursions are also popular. Visitors spend nearly $40 per person per day on guided activities in and around Sedona. The average nightly lodging rate was reported at $275 with nearly half of overnight guests spending more than $300 nightly.

Most visitors to Sedona do not seek out a visitor center. Just 15% usually or always look for one. Nearly 60% said they rarely or never look for visitor centers when visiting new destinations.

VISIT CHARACTERISTICS

FIRST-TIME VISITORS

The majority of visitors surveyed (nearly 60%) were on their first trip to Sedona.

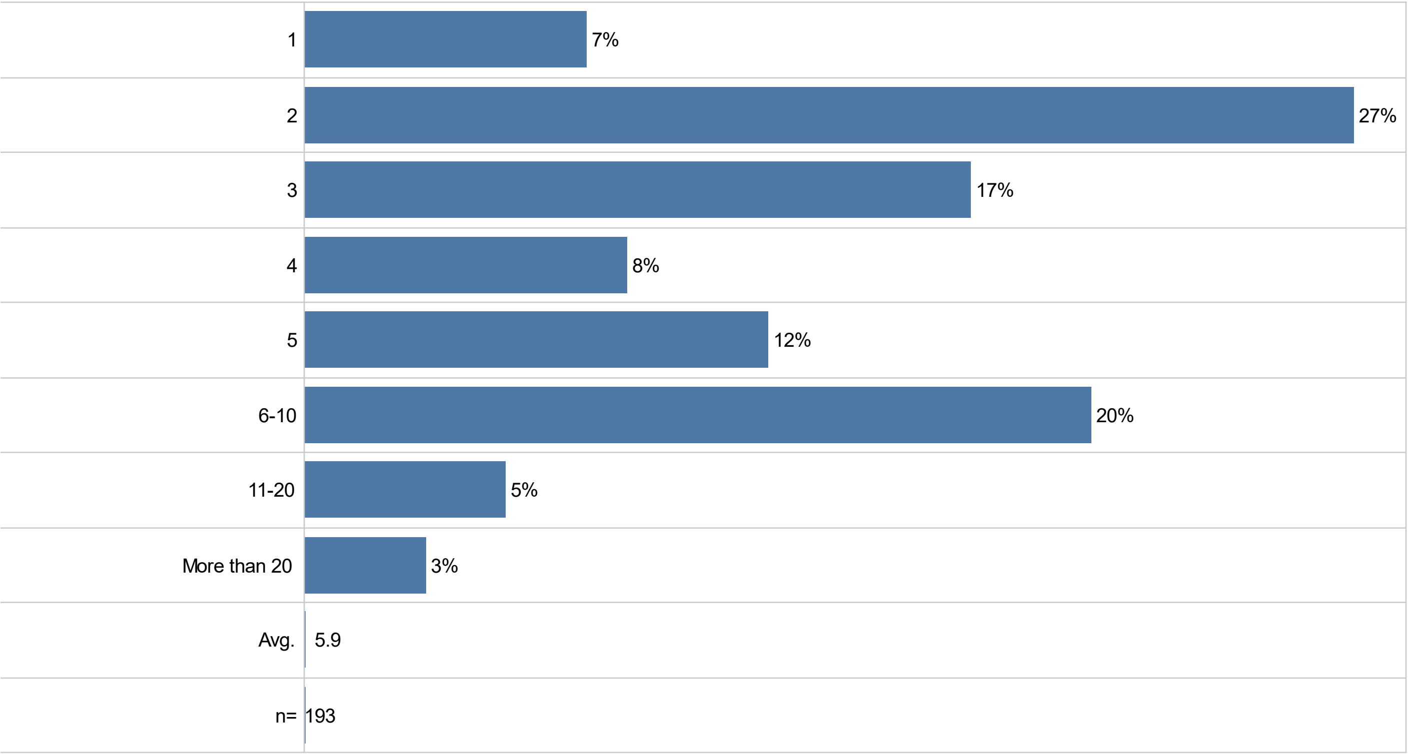


Source: RRC

FREQUENCY OF PREVIOUS VISITS

Among repeat visitors, the large majority have been multiple times. On average, they had been to Sedona 6 times before.

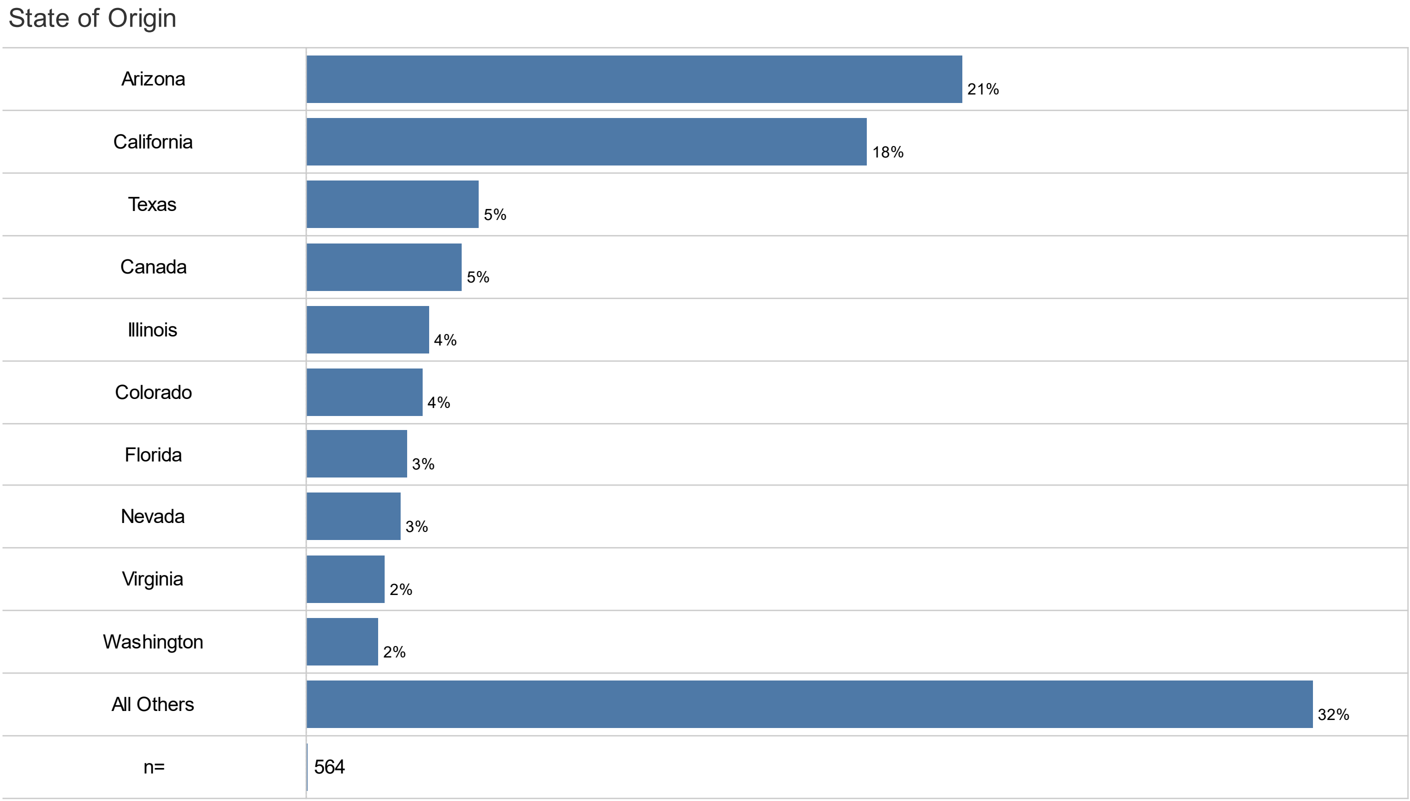
Including this visit, how many visits have you made to Sedona over the past five years?



Source: RRC

TOP STATES/COUNTRY OF ORIGIN

Not surprisingly, Arizona was the top state of origin for visitors, followed closely by California. Texans and Canadians each accounted for 5% of respondents while Illinois and Colorado each contributed 4%.



Source: RRC

METRO AREA / DMA OF ORIGIN

Looking at metro areas, Phoenix was by the far the largest source of visitors, followed by the California cities of Los Angeles, San Diego and San Francisco. 10% of respondents were International. As noted in the previous slide, about half of the foreign respondents were Canadian.

DMA of Origin

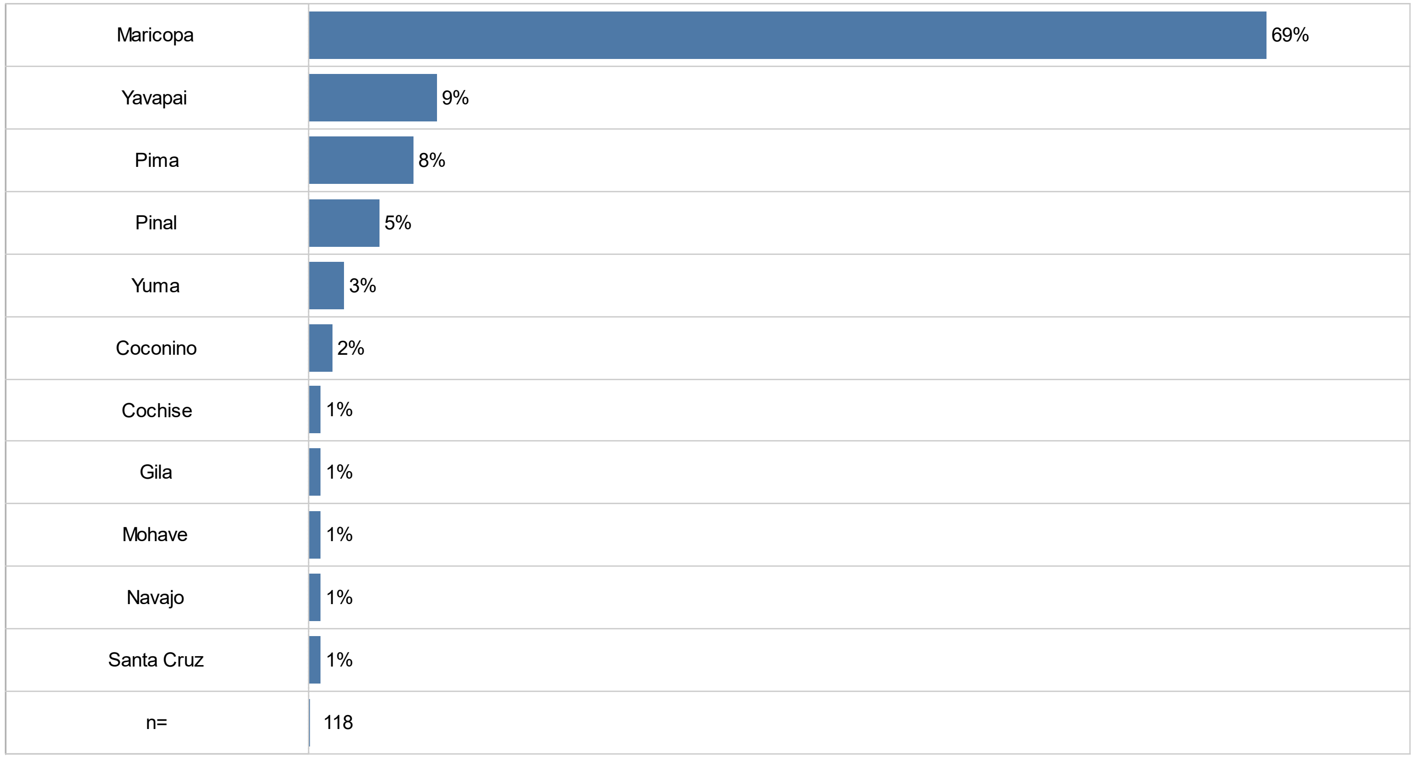
Phoenix -- AZ	18%
International	10%
Los Angeles -- CA	9%
San Diego -- CA	3%
San Francisco - Oakland - San Jose -- CA	3%
New York -- CT, NJ, NY, PA	3%
Denver -- CO, NE, NV, WY	3%
Washington (Hagerstown) -- DC, MD, PA, VA, WV	2%
Chicago -- IL, IN	2%
Las Vegas -- NV	2%
Tucson (Sierra Vista) -- AZ	2%
All Others	42%
n=	563

Source: RRC

ARIZONA VISITORS

Among Arizona respondents, the large majority were from Maricopa County (Phoenix area). Yavapai County (Prescott) was a distant second, followed by Pima County (Tucson).

County of Origin

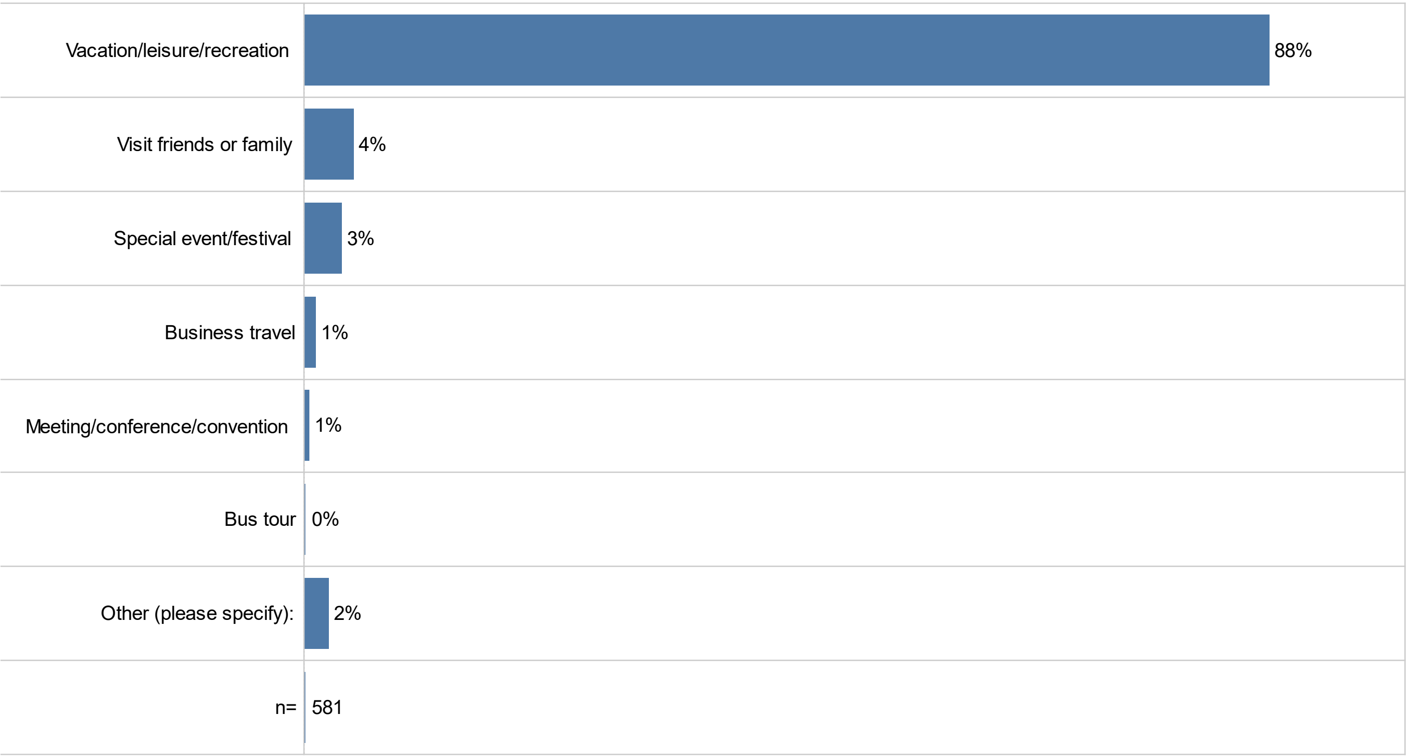


Source: RRC

REASON FOR VISITING

Most people visit Sedona as a vacation destination. Very few were in town for any other reason.

What was your primary purpose for visiting Sedona on this trip? (select one)

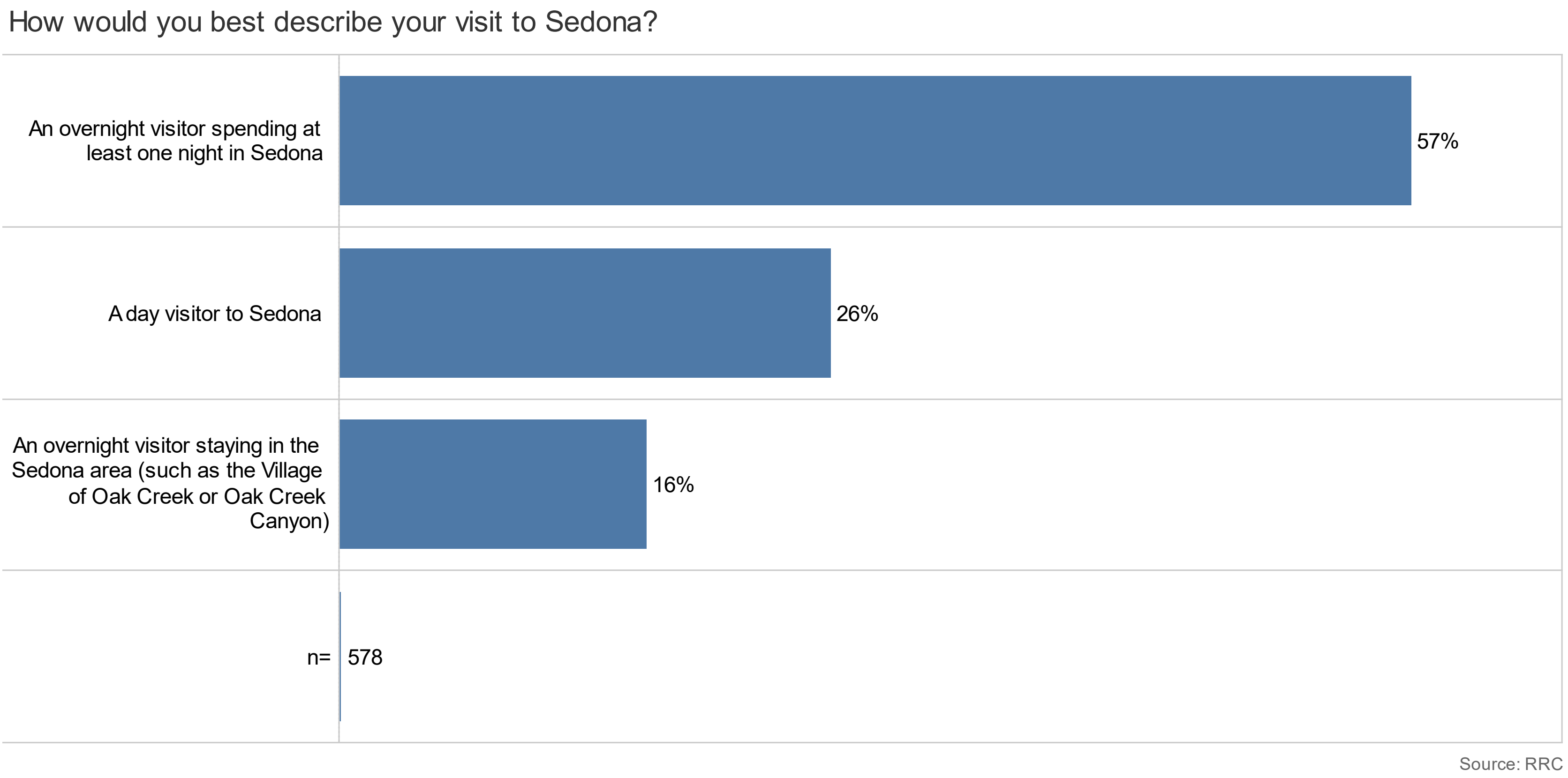


Source: RRC

OVERNIGHT VISITORS

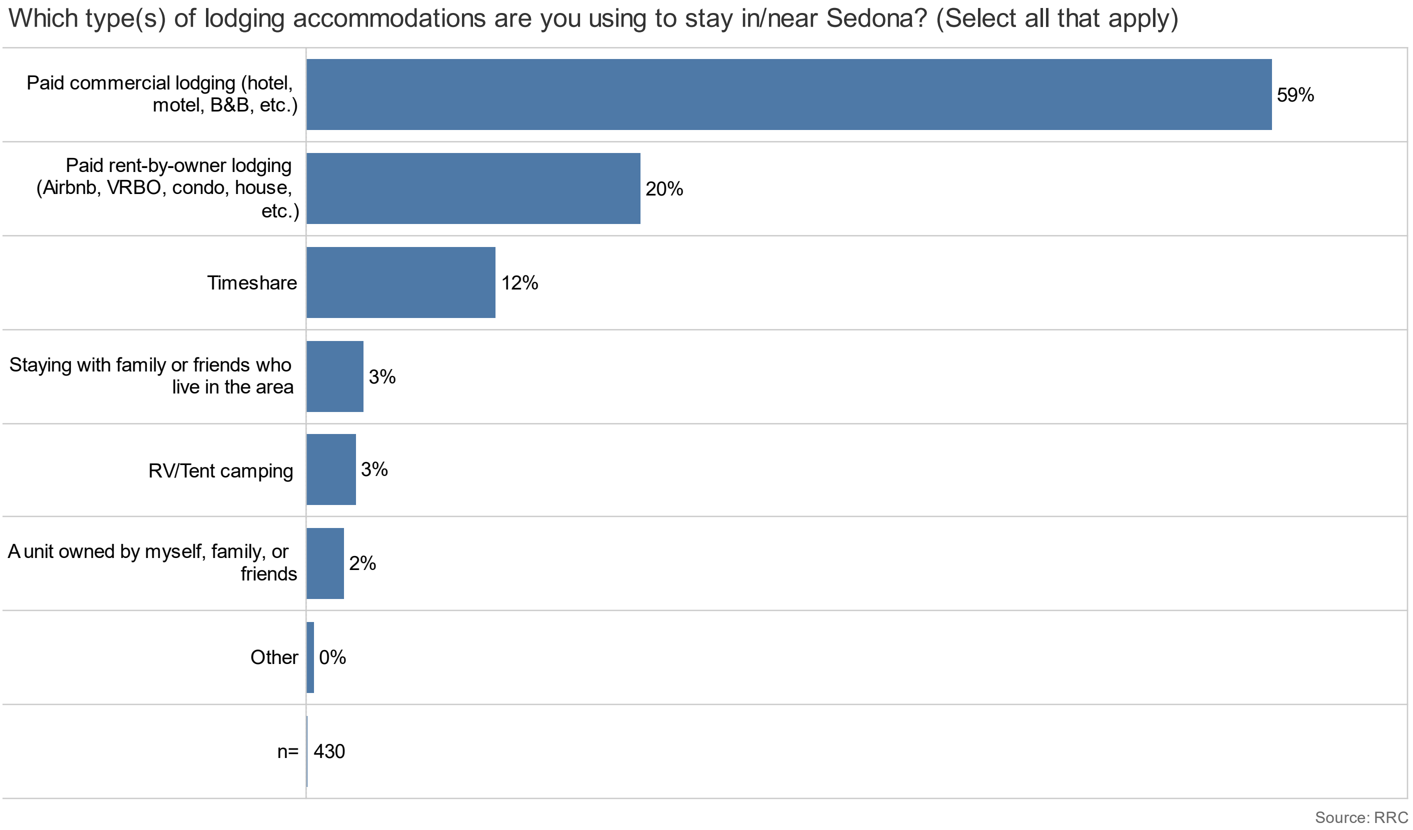
OVERNIGHT VS. DAY VISITORS

Three-quarters of visitors were staying overnight in Sedona or nearby.



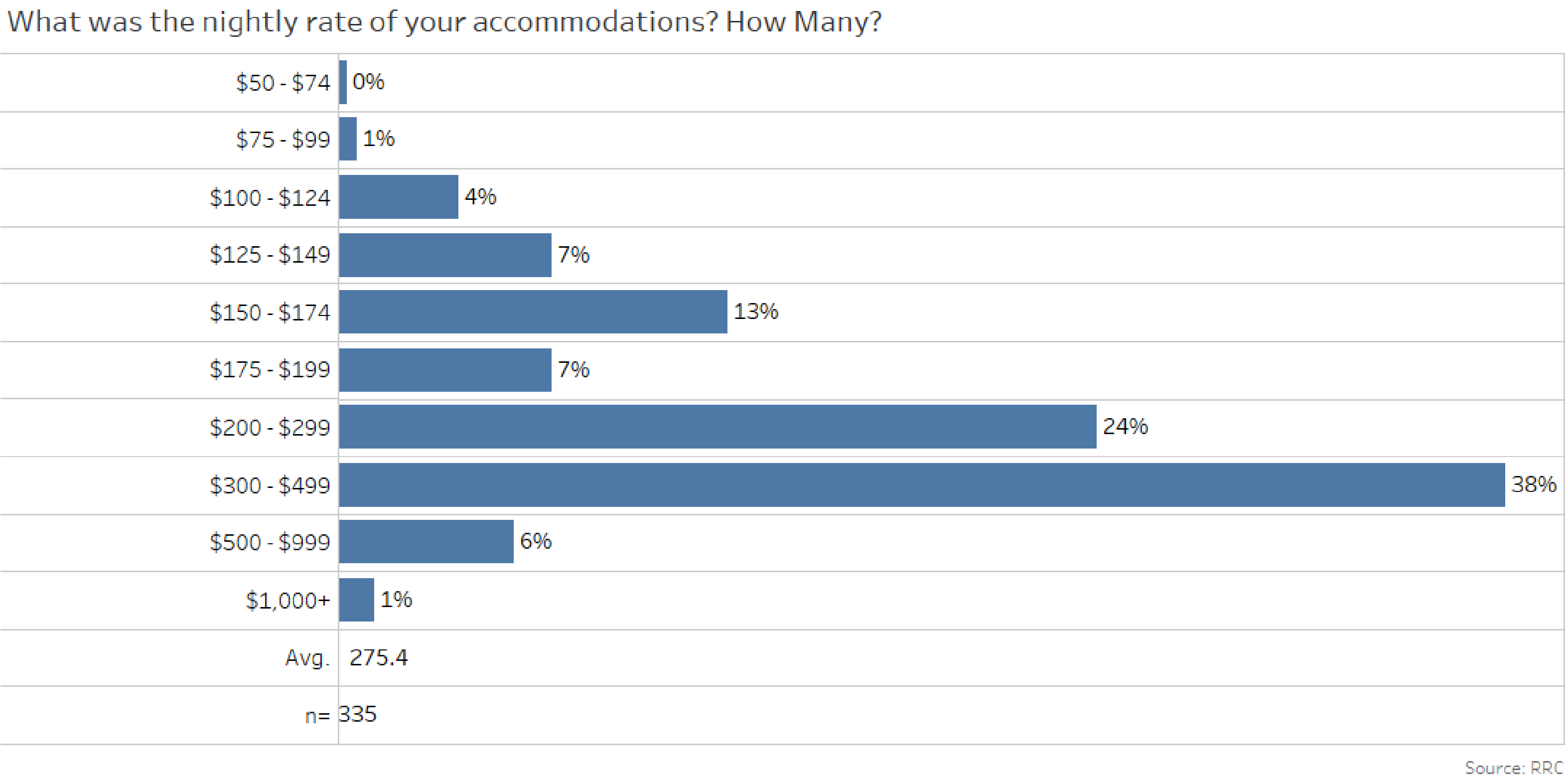
ACCOMMODATION TYPES

Nearly 60% stayed in commercial lodging and another 20% were staying in short-term rentals.



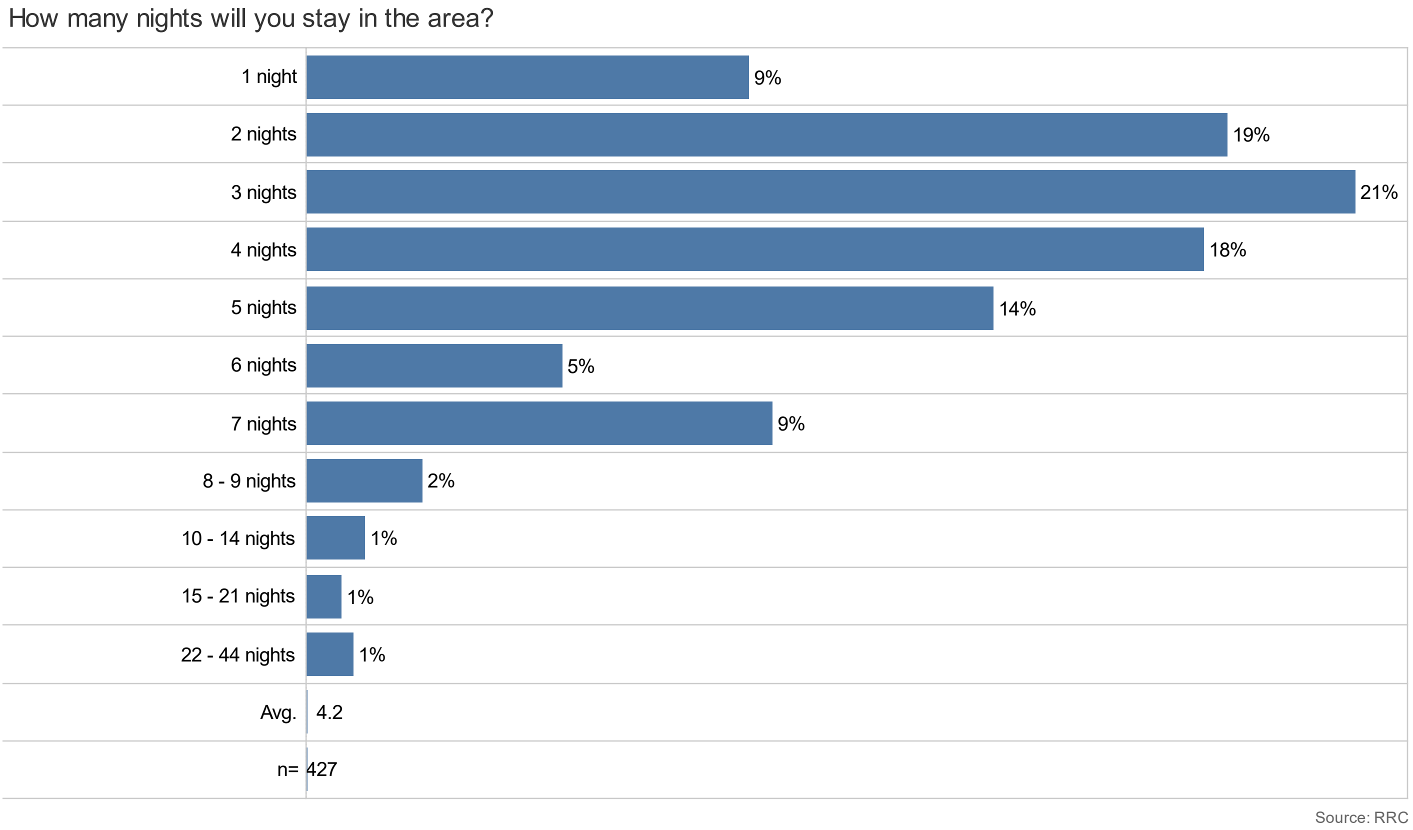
NIGHTLY RATE

Average daily rate for overnight visitors was $275 with 45% paying more than $300 per night.



VISITS FROM LODGING NEAR SEDONA

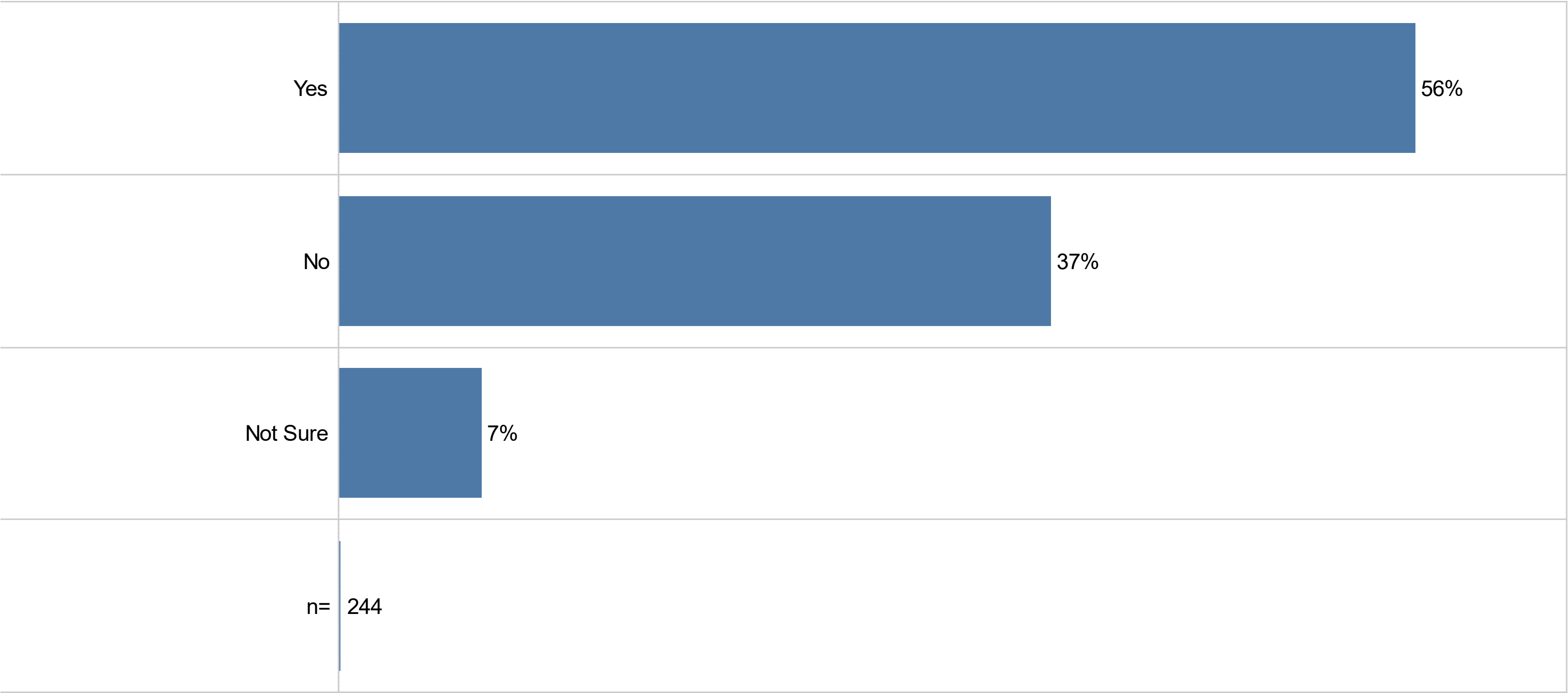
On average, overnight visitors were in town for 4 nights.



VISITING FROM NEARBY LODGING

Among those not staying in town, most were planning to visit Sedona more than once while in the area.

Are you visiting Sedona on this trip for more than one day?

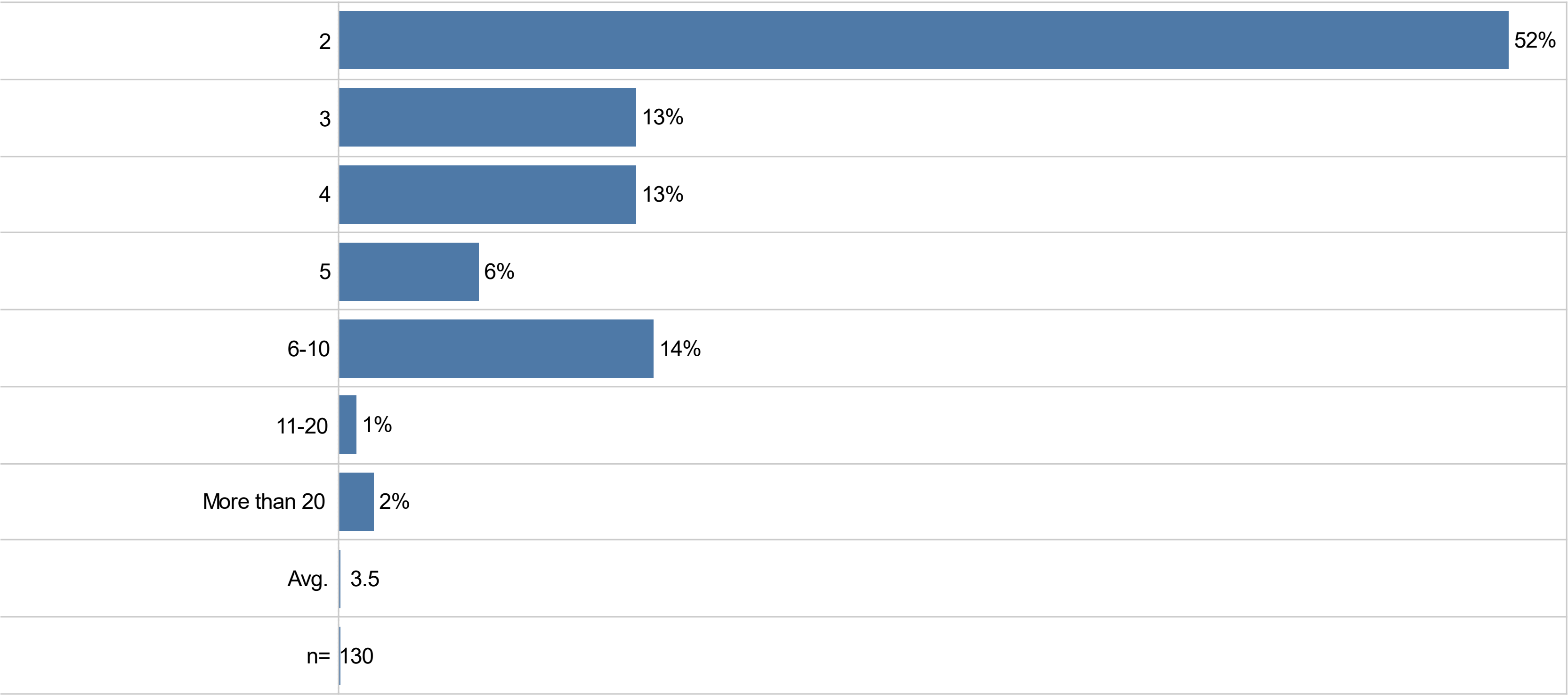


Source: RRC

VISITS FROM LODGING NEAR SEDONA

On average, those staying outside of town planned 3.5 trips to Sedona during their visit to the area.

Are you visiting Sedona on this trip for more than one day? How Many?

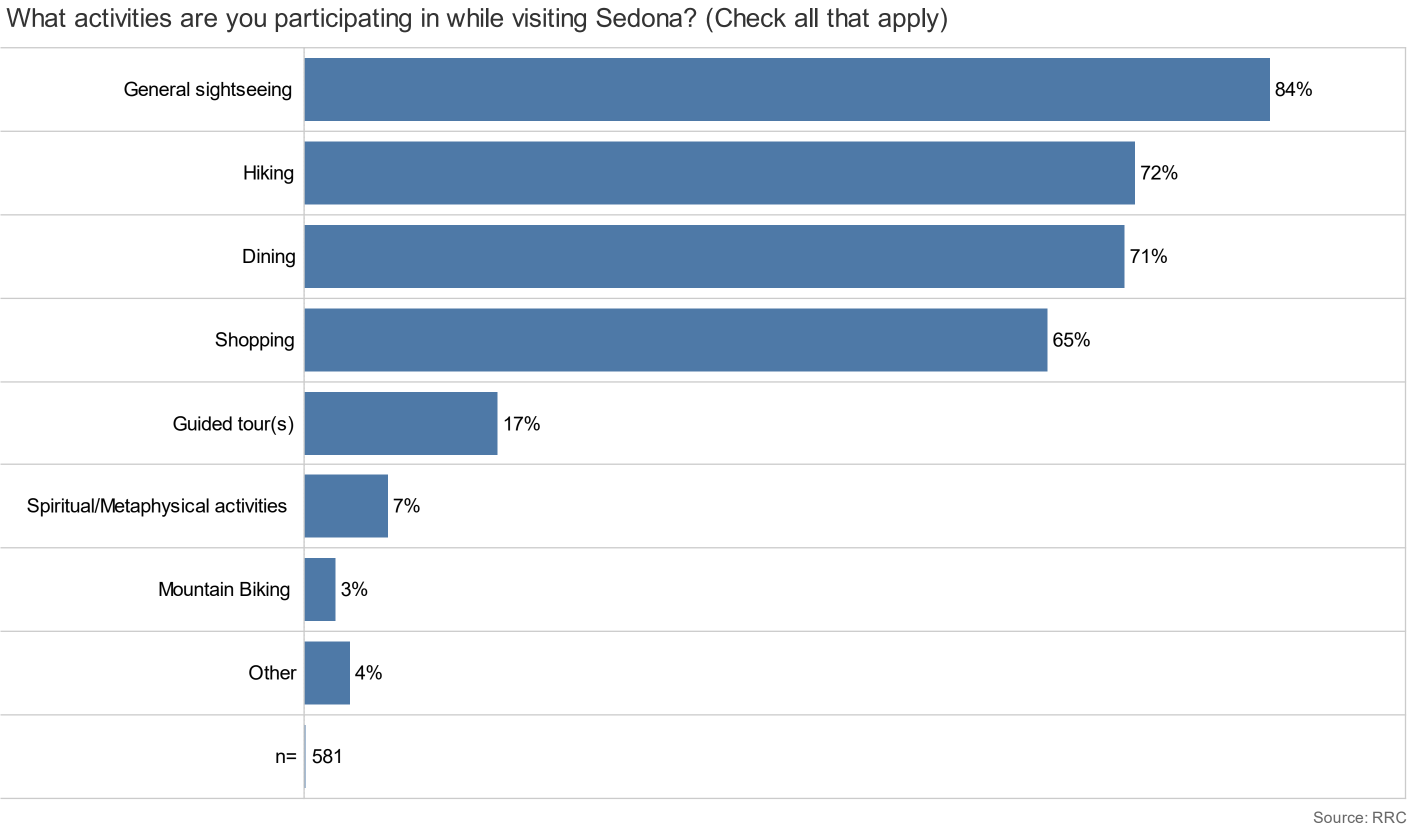


Source: RRC

SPENDING & ACTIVITIES

ACTIVITIES IN SEDONA

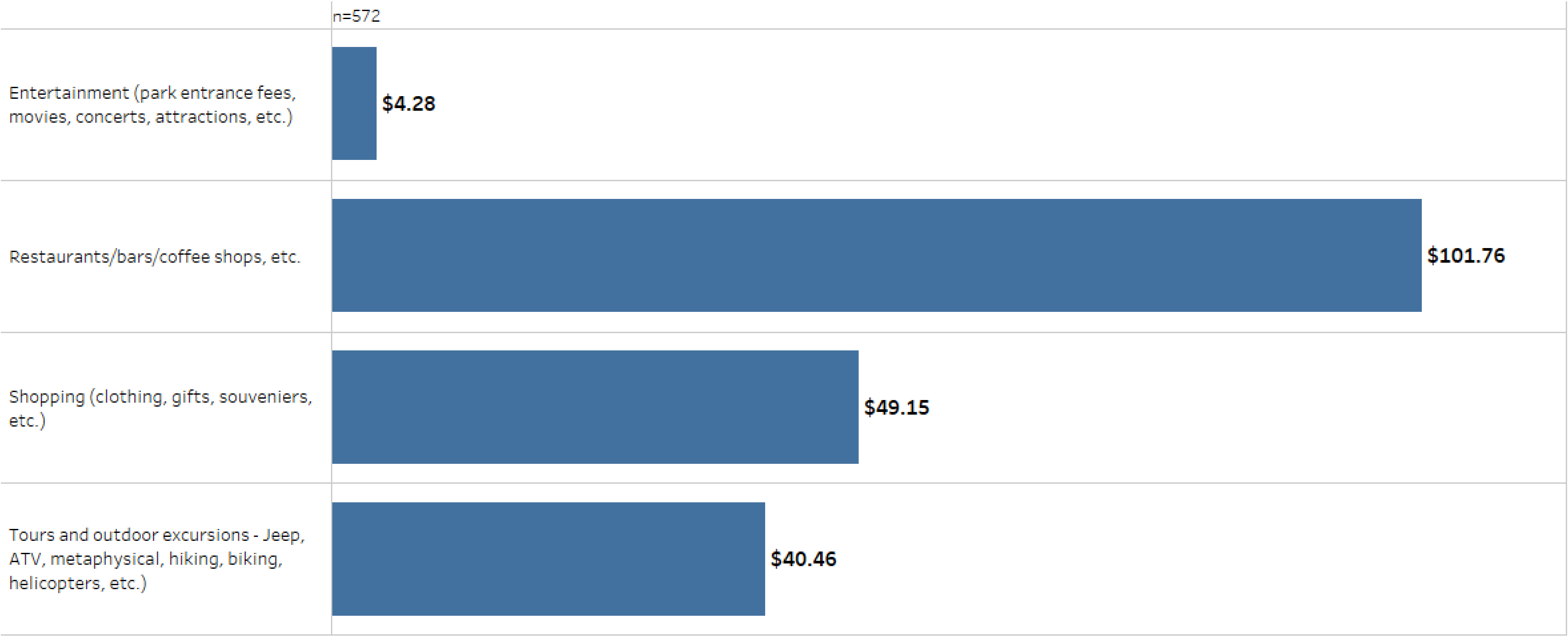
Sightseeing, hiking, dining and shopping were the top activities engaged in by visitors.



SPENDING PER PERSON

Visitor spending in Sedona is significant. On average, visitors each spent over $100 per day on restaurants, nearly $50 on shopping, and about $40 on tours and excursions.

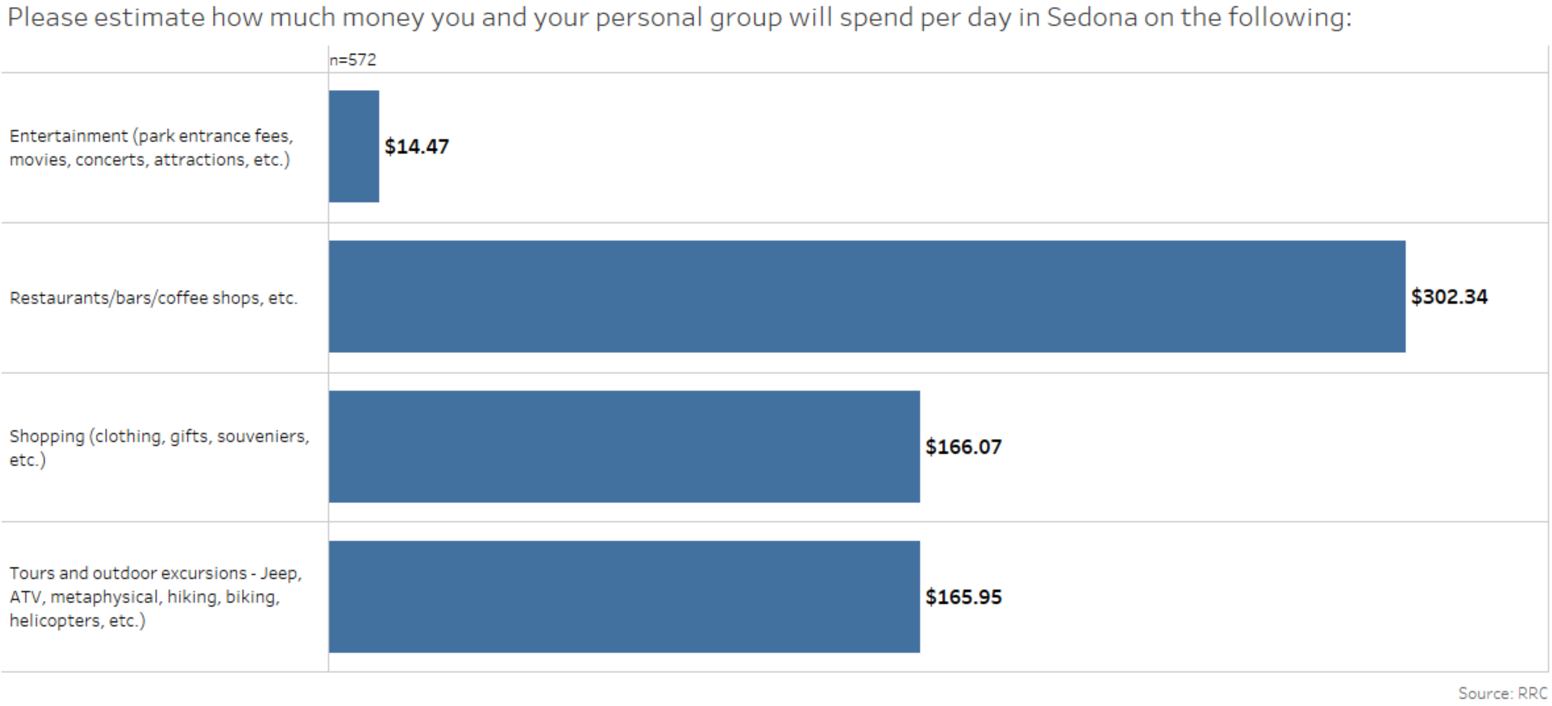
Please estimate how much money you and your personal group will spend per day in Sedona on the following (Per person per day)



Source: RRC

SPENDING BY TRAVEL PARTY

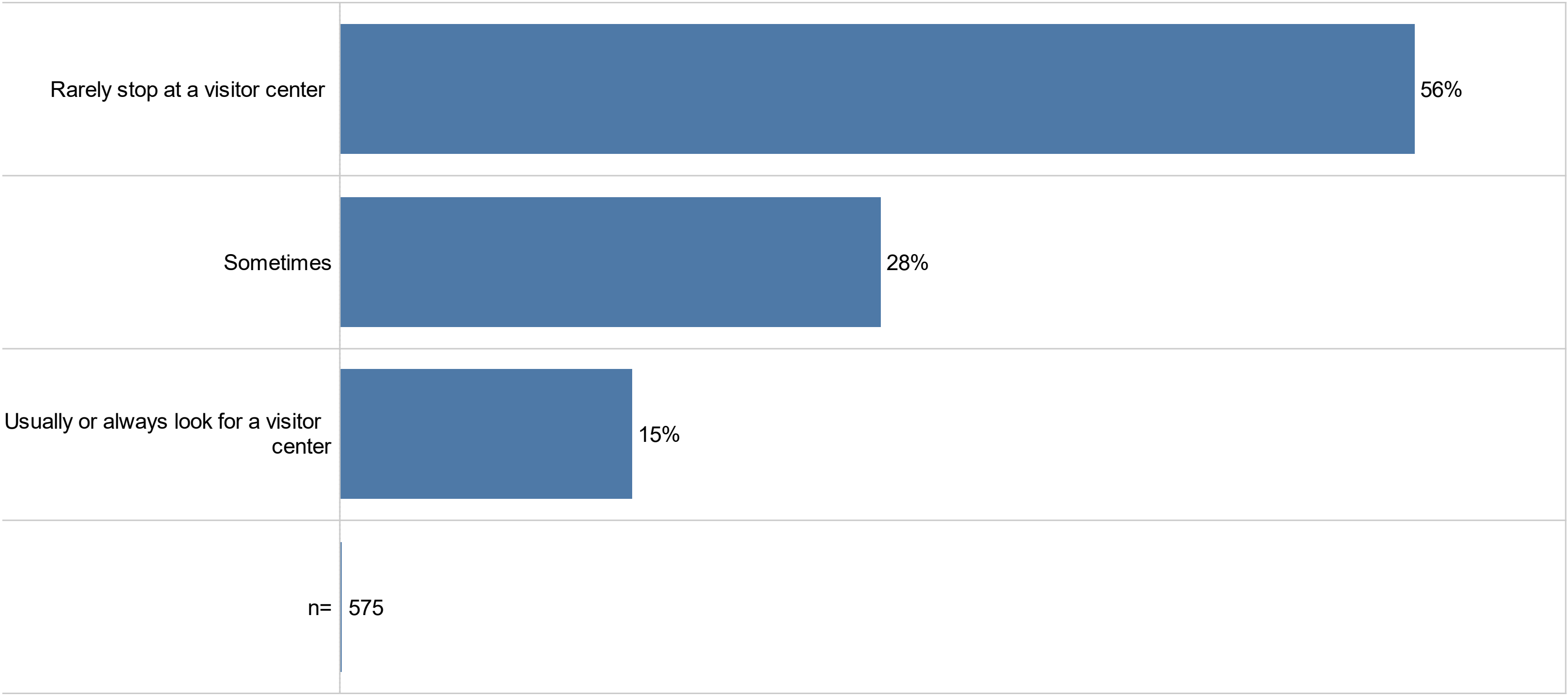
Looking at spending by groups, dining out was the top expenditure for visitors to Sedona by a wide margin.



USE OF VISITOR CENTERS

Most people do not seek out visitor centers when visiting a new destination. More than half said they “rarely” stop at a center.

When visiting a new destination, do you generally look for a visitor center to get local information?



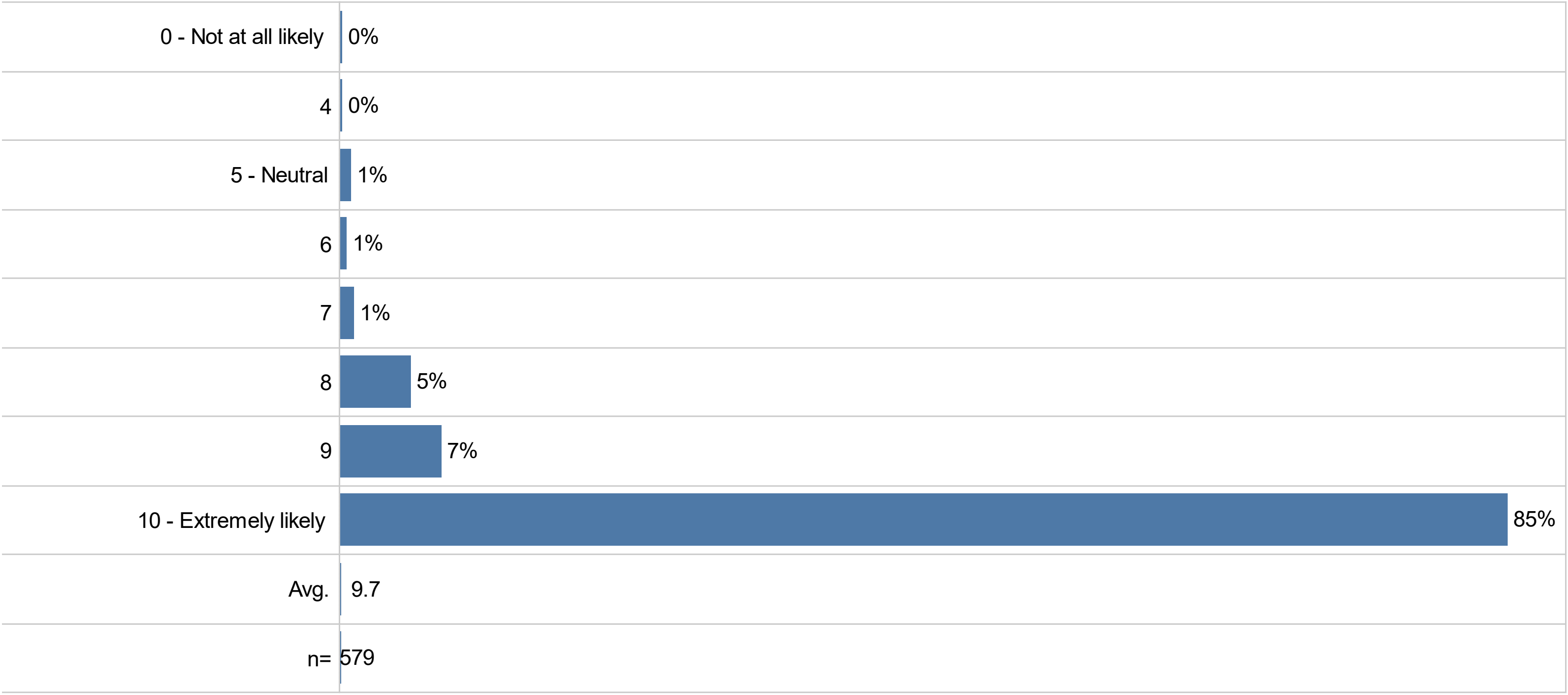
Source: RRC


RATING SEDONA

NET PROMOTER SCORE

Visitors love Sedona! The Net Promoter Score (NPS) of 90 is extremely high relative to most resort destination ratings.

How likely would you be to recommend Sedona as a travel destination to a friend or family member? (Scale 0 = “Not at all likely” to 10 = “Extremely likely”)

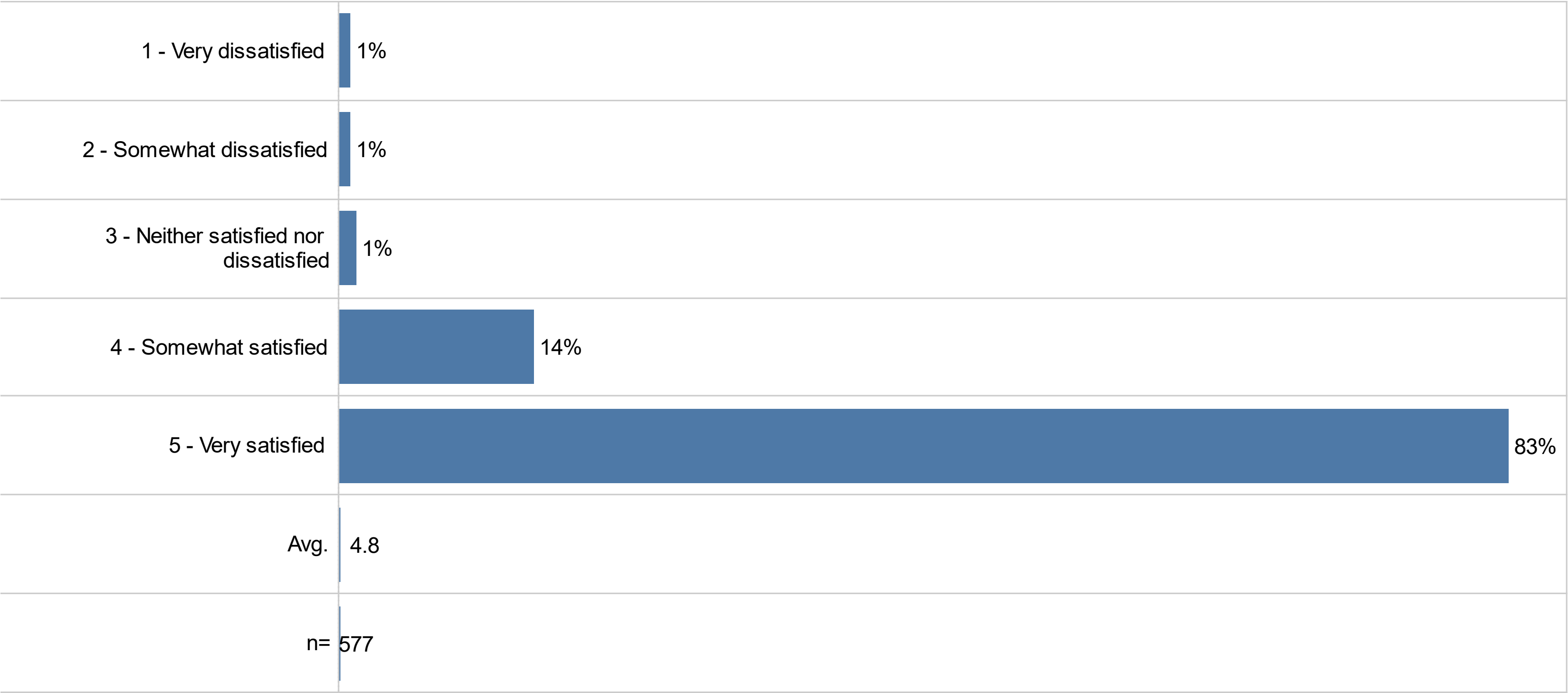


Source: RRC

RATING THE SEDONA EXPERIENCE

When asked to rate the Sedona experience, the high NPS score was reinforced with an extremely high satisfaction rating of 4.8 on a scale of 1-5.

How satisfied are you with your experience in Sedona so far? (1 = “Very dissatisfied” to 5 = “Very Satisfied”)

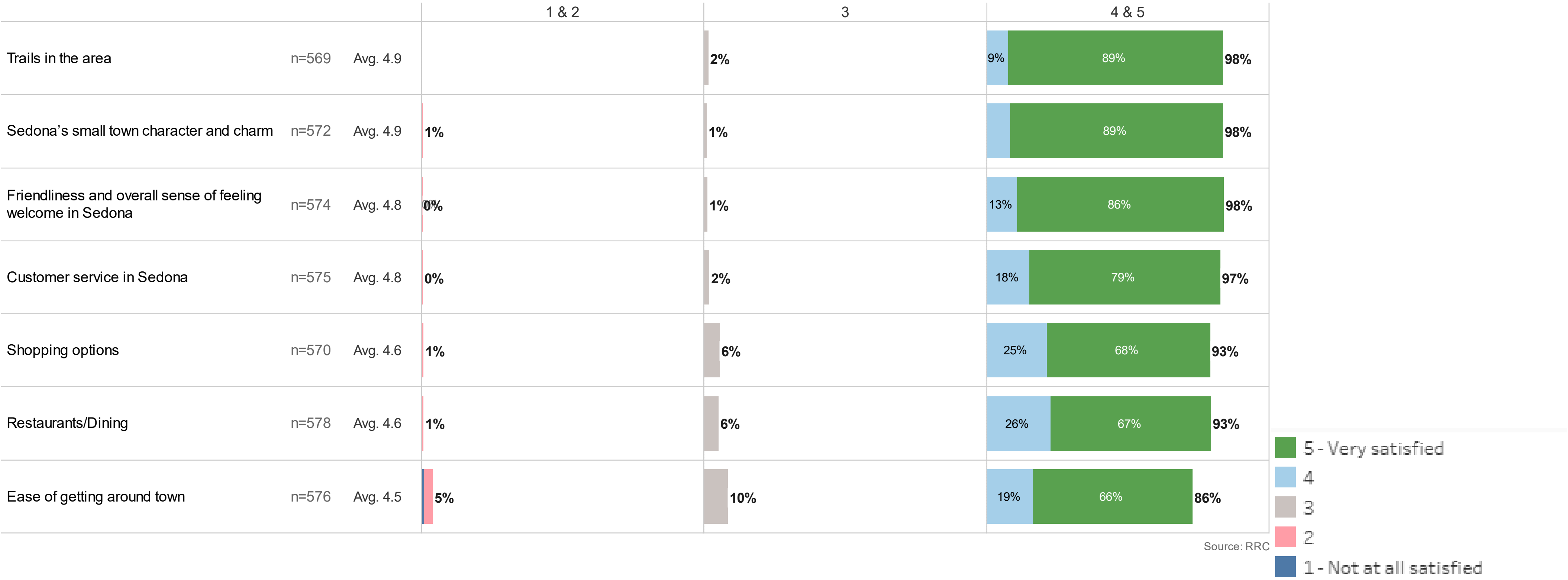


Source: RRC

RATING ATTRIBUTES OF SEDONA

All aspects of Sedona rated extremely high with visitors. Trails, small town charm, friendliness and customer service topped the list. The lowest rated item was getting around town – which still came in with a very positive 4.5 rating on a 1-5 scale.

On a scale of 1-5 (1="Very dissatisfied to 5 = "Very satisfied") how would you rate:



Source: RRC

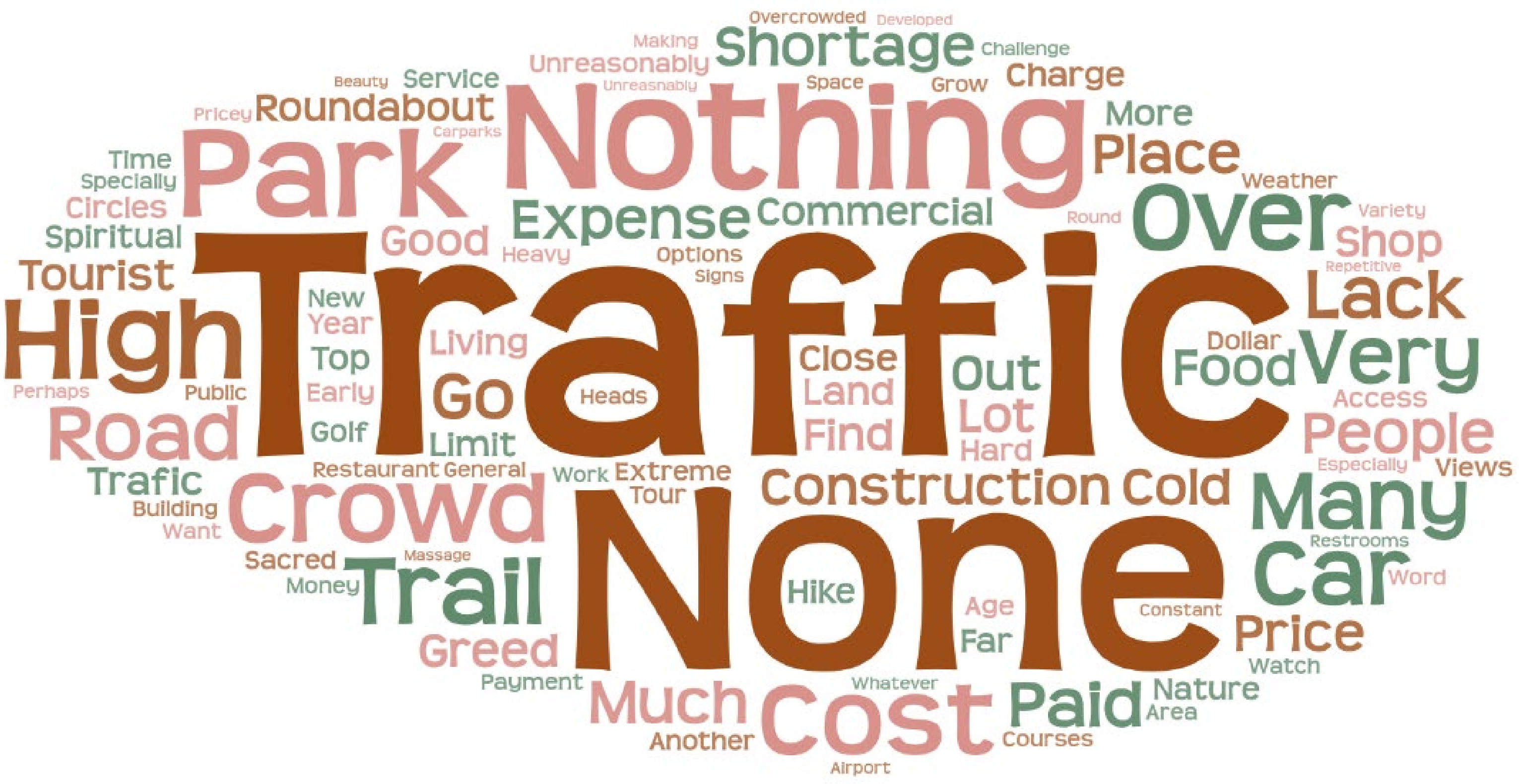
RRC

FAVORITE EXPERIENCE

Hiking, nature, scenic views and Red Rocks were the top-rated features when asked about favorite aspects of visiting Sedona. Art, shopping and dining were also noted but far less often than the outdoor attractions in the area.

LEAST FAVORITE EXPERIENCE

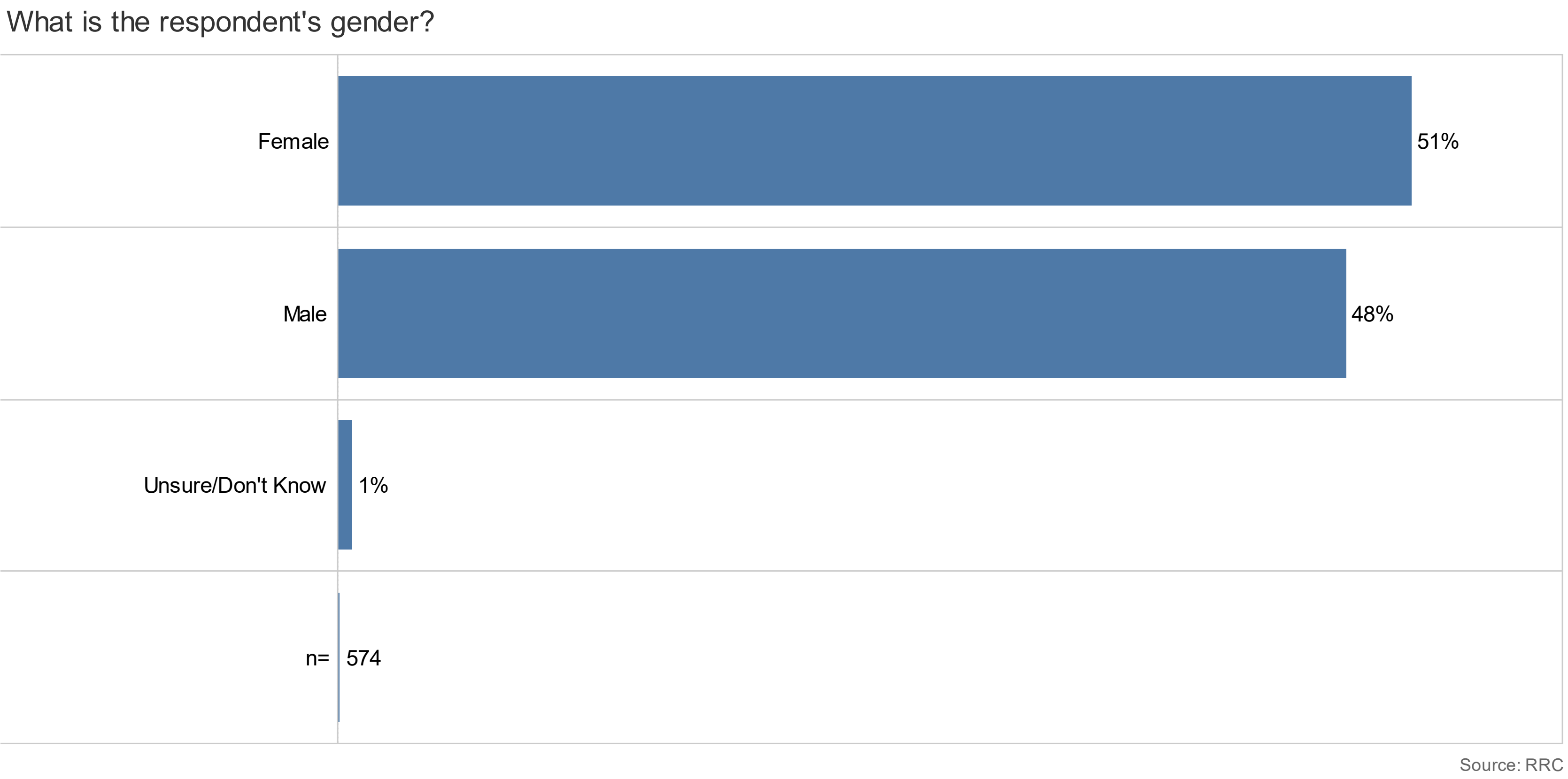
When asked about their least favorite experience while visiting, the dominant theme was traffic and parking. Several people commented that even though they love Sedona, they would not recommend it because of the increasing issues with crowding.



DEMOGRAPHICS

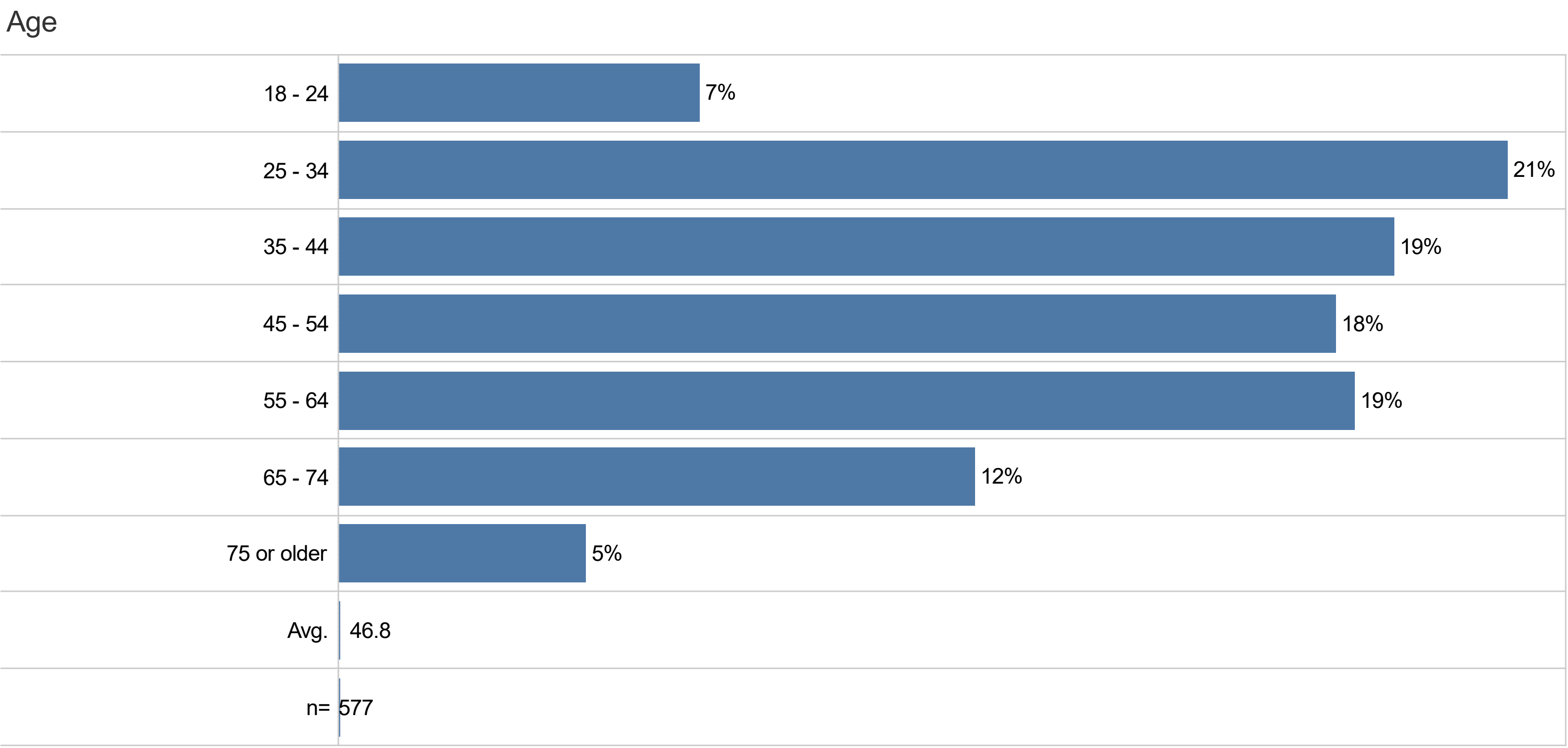
GENDER

Respondents were split fairly evenly among males and females.



AGE

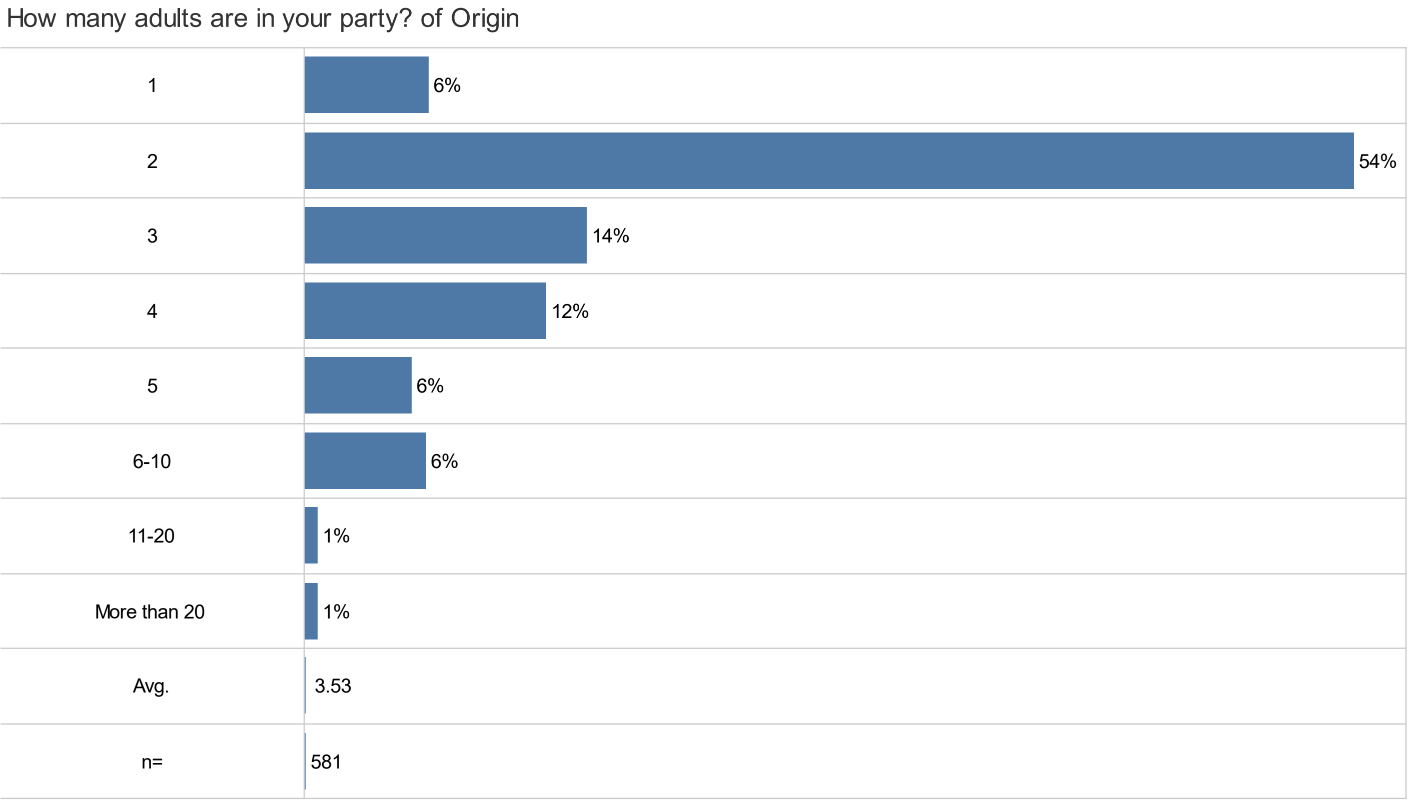
The average age of visitors surveyed was 47. Nearly half were under 45.



Source: RRC

PARTY - ADULTS

A majority of visitor parties had two adults. 35% were with larger groups and just 6% were alone.

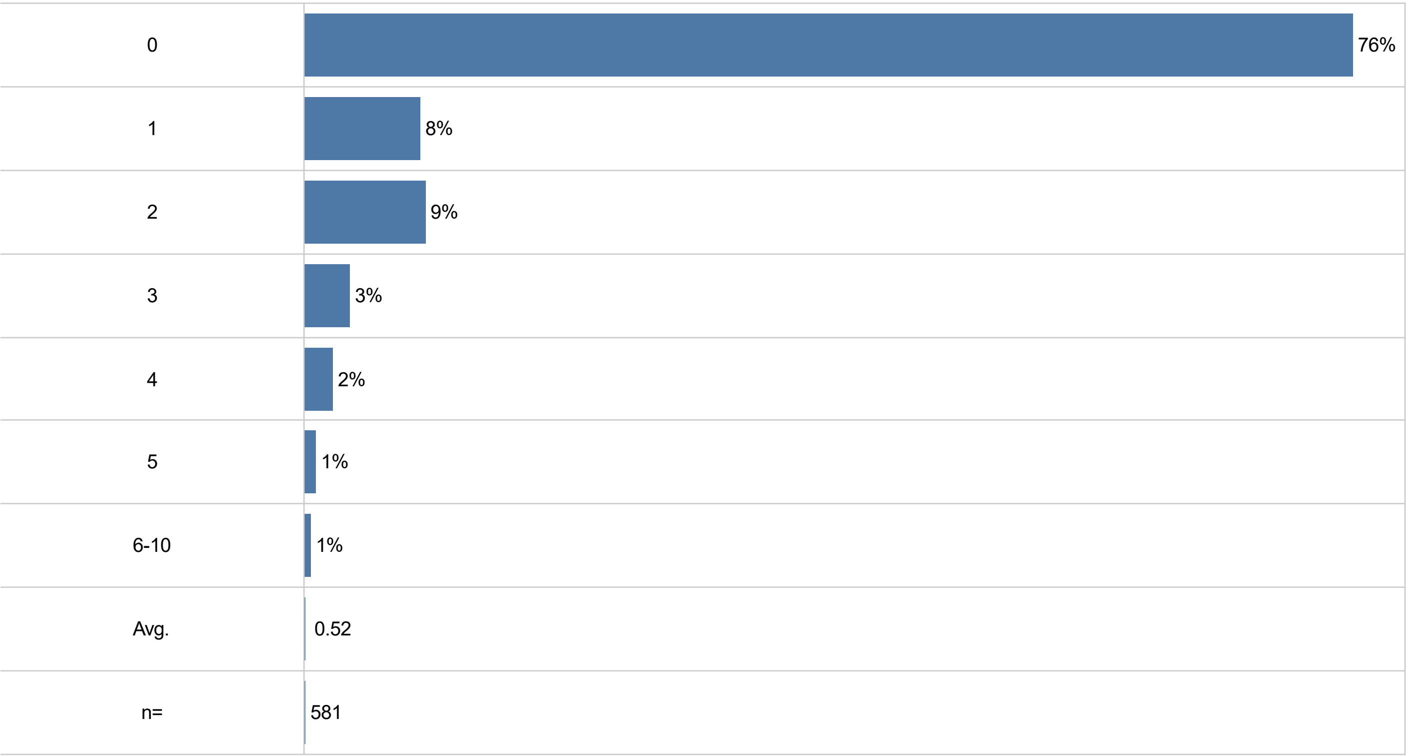


Source: RRC

PARTY - CHILDREN

About 1 in 4 respondent parties included children. Of those traveling with kids, the average number was two.

How many children are in your party? of Origin



Source: RRC

THANK YOU!

RRC Associates
4770 Baseline Road, Suite 355
Boulder, CO
80303
(303) 449-6558
www.rrcassociates.com

CITY OF SEDONA

TOURISM PROGRAM

City Council Update

March 27, 2024

Hotel Performance Summary

Sedona+ | January 2024

Month	Location	Compare to	Year Type
January 2024	Sedona+	Previous Year	Calendar Year

	Occupancy	ADR	RevPAR	Supply	Demand	Revenue
	53.3%	$263.47	$140.35	67.0K	35.7K	$9.4M
Change vs. Previous Year	▲ 4.6%	▲ 9.2%	▲ 14.2%	▲ 3.0%	▲ 7.7%	▲ 17.6%
YTD Calendar Year	53.3%	$263.47	$140.35	67.0K	35.7K	$9.4M
YTD Change vs. Previous Year	▲ 4.6%	▲ 9.2%	▲ 14.2%	▲ 3.0%	▲ 7.7%	▲ 17.6%

Last Six Months Performance

	Occupancy	ADR	RevPAR
Aug 2023	54.3%	$251	$136
Sep 2023	65.6%	$360	$236
Oct 2023	74.0%	$411	$304
Nov 2023	70.1%	$352	$247
Dec 2023	60.2%	$319	$192
Jan 2024	53.3%	$263	$140

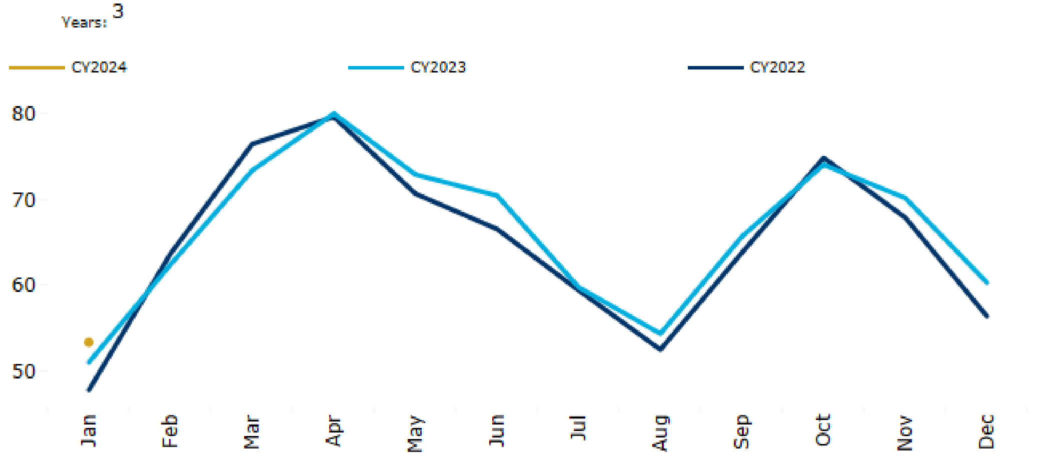
January Performance by Year

Sedona+

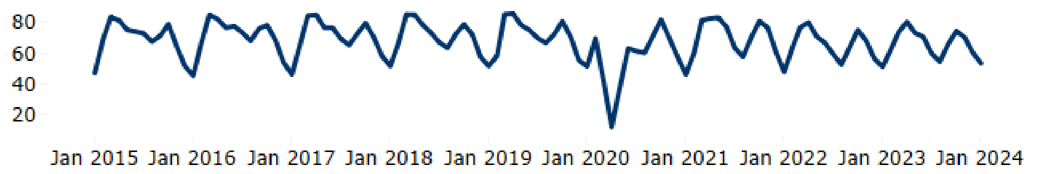
	Occupancy	ADR	RevPAR
Jan 2019	51.5%	$187	$96
Jan 2020	51.2%	$195	$100
Jan 2021	46.1%	$225	$104
Jan 2022	47.7%	$277	$132
Jan 2023	50.9%	$241	$123
Jan 2024	53.3%	$263	$140

Occupancy YOY Comparison

Occupancy



Occupancy Long Term Trend



Source: STR

SYMPHONY TOURISM ECONOMICS

Sedona+ Lodging Summary

January 2024

Aggregated Lodging Summary

Source: STR & KeyData

	Occupancy	ADR	RevPAR
Jan 2024	36.0%	$293.66	$105.63
% Change vs. Jan 2023	-8.6%	4.9%	-4.1%
% Change vs. Dec 2023	-21.7%	-13.8%	-32.5%
CYTD 2024	36.0%	$293.66	$105.63
% Change vs. CYTD 2023	-8.6%	4.9%	-4.1%

Hotel Performance (Sedona+)

Source: STR

	Occupancy	ADR	RevPAR
Jan 2024	53.3%	$263.47	$140.35
% Change vs. Jan 2023	4.6%	9.2%	14.2%
% Change vs. Dec 2023	-11.6%	-17.5%	-27.0%
CYTD 2024	53.3%	$263.47	$140.35
% Change vs. CYTD 2023	4.6%	9.2%	14.2%

Short Term Lodging (Vacation Area - Greater Sedona)

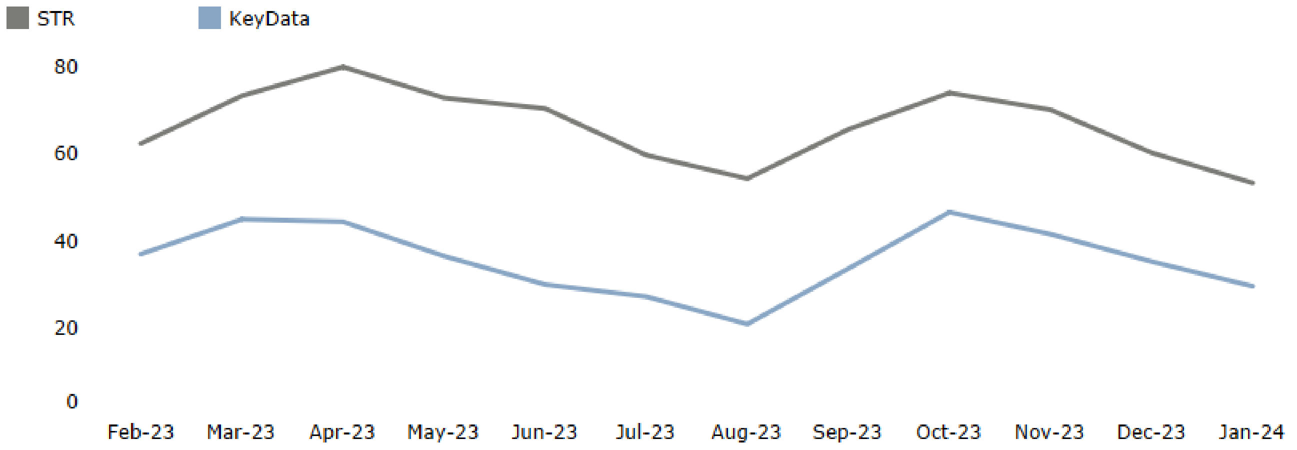
Source: KeyData

	Occupancy	ADR	RevPAR
Jan 2024	29.5%	$314.14	$92.60
% Change vs. Jan 2023	-0.8%	1.8%	1.0%
% Change vs. Dec 2023	-16.2%	-15.6%	-29.2%
CYTD 2024	29.5%	$314.14	$92.60
% Change vs. CYTD 2023	-0.8%	1.8%	1.0%

Occupancy (Hotels: Sedona+; KeyData: Vacation Area - Greater Sedona)

Last 12 Months

Measure
Occupancy



Domestic Visitors: Greater Sedona Area

Study Geography	Start Date	End Date	Trip Type	Weekend/Weekday Trips
Greater Sedona Area	January 01, 2024	January 31, 2024	Overnight	All

Sample Size: 22,242

2.8 days Avg Length of Stay	**100.0%** Overnight	**77.0%** Repeat

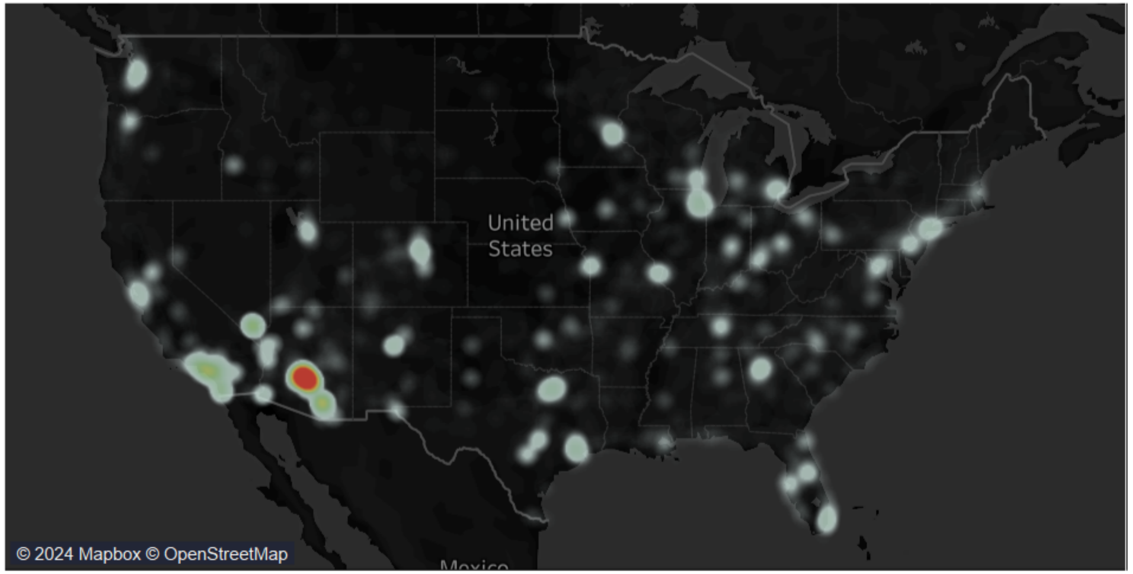
Top Visitor Origin States
% share of total

Arizona	43.4%
California	11.9%
Texas	5.7%
Florida	3.2%
Nevada	2.8%
Illinois	2.4%
Colorado	2.0%
Ohio	1.7%
Washington	1.6%
Michigan	1.5%

Top Visitor Origin DMAs
% share of total

Phoenix, AZ	38.5%
Los Angeles, CA	6.0%
Tucson (Sierra Vista), AZ	4.3%
Las Vegas, NV	2.7%
Chicago, IL	1.9%
Dallas-Ft. Worth, TX	1.9%
San Diego, CA	1.9%
Palm Springs, CA	1.6%
Houston, TX	1.6%
Denver, CO	1.5%
Albuquerque-Santa Fe, NM	1.5%

US Mainland Origin Heat Map



Cross Visits
% share of visitors

Sedona	64.2%
Camp Verde	13.9%
Cottonwood	11.3%

Top POIs Visited
% share of trips

West Sedona Business District	42.7%
Uptown Business District	20.4%
Village Of Oak Creek Business District	18.5%
Oak Creek Canyon Corridor	14.5%
Flagstaff	11.7%
Gallery Row	11.7%
89A And 179	7.0%
Airport Mesa	5.4%
Tlaquepaque North & South	4.0%
Hilton	3.3%
Chapel Of The Holy Cross	3.3%

Demographic Estimates

Household Income
Median: $93.6K

<25K	25K - 49K	50K - 75K	75K - 100K	100K - 149K	150K+
13%	16%	16%	13%	19%	23%

Age Groups

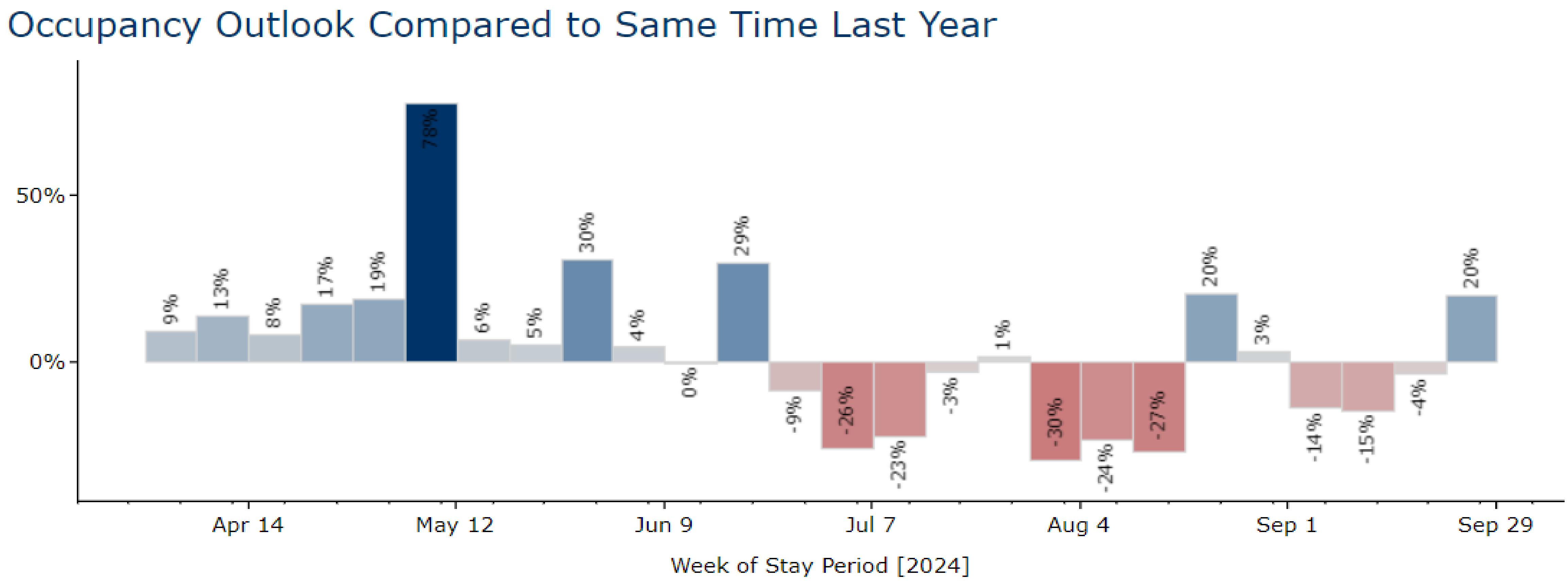
19Y -24Y	25Y - 34Y	35Y - 44Y	45Y - 54Y	55Y - 64Y	65Y+
9%	13%	13%	13%	13%	17%

Race

White	Black	Asian	Other	2+ races
66%	6%	6%	10%	12%

Source: Near & US Census Bureau

Future hotel demand looks strong in spring, softer in summer



Visit Sedona Spending Summary

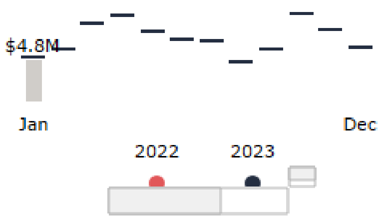
Period: January 2024

Month
January 2024

Report Type
Month

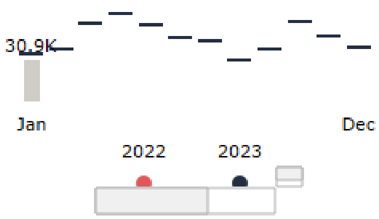
$4.8M
Card Spend

-12.2% vs. Previous Year



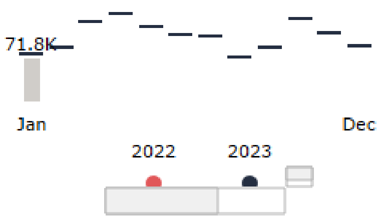
30.9K
Cardholders

-14.7% vs. Previous Year



71.8K
Transactions

-13.6% vs. Previous Year



Top Origin DMAs

Phoenix-Prescott, AZ	19.8%
Los Angeles, CA	8.6%
Chicago, IL	3.6%
New York, NY	3.3%
Minneapolis-St. Paul, MN	2.9%
Seattle-Tacoma, WA	2.9%

Spend Share by Age**

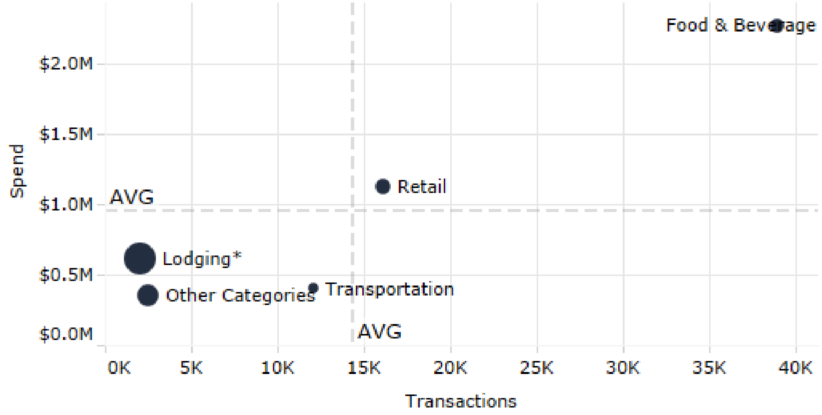
20-29	3.9%
30-39	11.7%
40-49	17.4%
50-64	41.7%
65+	25.3%

Spend Share by Income**

<50k	11.1%
50-100k	16.6%
100-150k	25.7%
150-200k	15.7%
200-250k	9.7%
250k+	21.2%

Transactions vs. Spend Amount

Size of bubble denotes spend per transaction



Spending Categories

% Share of total in-market credit card spend

Food & Beverage	47.6%
Retail	23.7%
Lodging*	13.0%
Transportation	8.4%
Other Categories	7.3%

Source: TransUnion/Commerce Signals; *Lodging spend represents in-market spend only; **Sample with unspecified age/income excluded

SYMPHONY TOURISM ECONOMICS

Sedona

Winter 23/24 Campaign

Campaign Goals and Objectives

For the winter campaign, we aimed to deliver a positive Return On Ad Spend (ROAS) and show direct attribution for the marketing dollars and how they resulted in driving hotel stays and broader economic impacts.

We specifically targeted winter visitation from key historic flight markets:

- NYC
- Chicago
- Minneapolis

And worked to build awareness in new/emerging markets:

- Seattle
- San Diego
- Las Vegas
- San Francisco
- Denver
- Santa Fe
- Durango
- Park City

Key Takeaways

- Programmatic (via Datafy) campaigns are bringing the majority of traffic to the new Scenic Sedona website. During the campaign we saw more than 19,000 new users to the site.

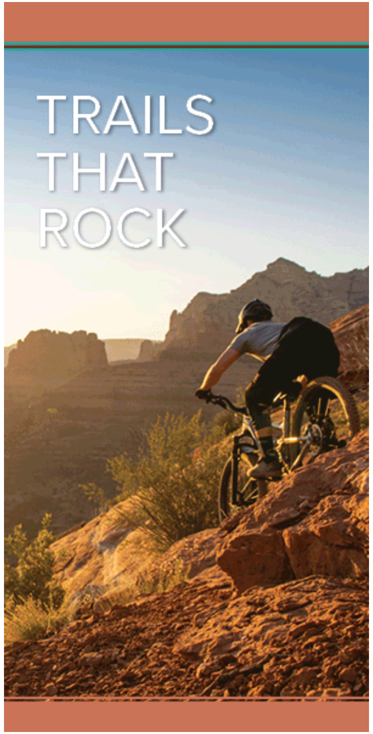
- Our top markets for visitation to the destination aligns with the top delivery markets. We are seeing direct correlation to those that were served Sedona's winter ads showing up in the destination.

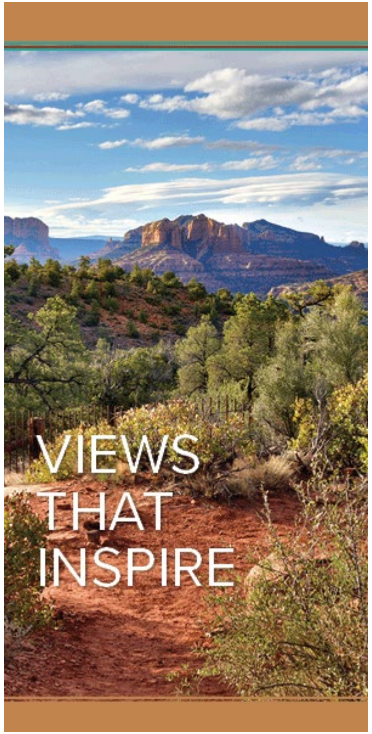
- All campaign benchmarks were met or exceeded.

- With an Average Daily Rate of $301 (per Smith Travel Research) during this campaign, and an average visitor spend of $190/trip (per Visitor Intercept Survey), there is an estimated $409,171 of total economic impact from this campaign to date. This is an 8.7:1 Return on Ad Spend thus far.

Sample Campaign Creative Assets

(Top Performer)





Attribution Results - Destination

Destination

Total Trips/Visits
1,043

Total Visitor Days Observed
1,744

Est. Average Length of Visit
1.7 Days

Est. Campaign Impact
$198,170

Top DMAs	Share
San Diego	27%
Chicago	12%
Minneapolis-St. Paul	11%
San Francisco-Oak-San Jose	11%
New York	10%
Las Vegas	9%

Top DMA's for visitation to the destination aligns with the top delivery markets. We are seeing direct correlation to those that were served our ads showing up in the destination.

This data is through Feb 10, 2024. It will continue to be updated, typically with a three-week lag in reporting.

Attribution Results - Hotels

Hotels

Total Trips/Visits
326

Est. Room Nights Observed
701

Est. Average Length of Visit
2.2 Days

Est. Campaign Impact
$211,001

Top DMAs	Share
San Diego	33%
Chicago	15%
San Francisco-Oak-San Jose	13%
Denver	10%
New York	9%
Seattle-Tacoma	7%

Overnight stays in hotels also align with top delivery markets and audience targeting.

More than 67% of all visitors that came from our advertising stayed in a hotel.

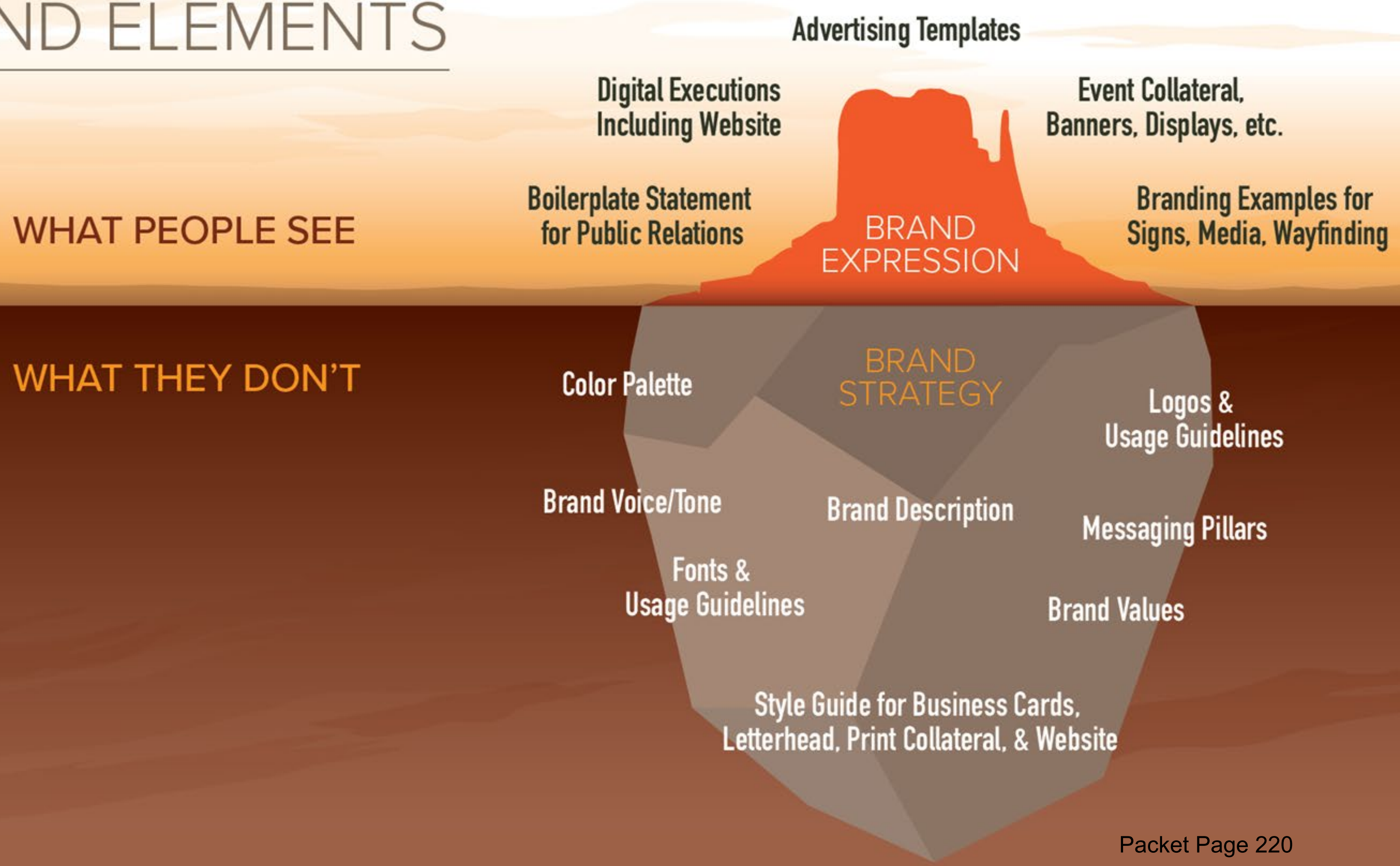

THANK YOU
DVA ADVERTISING & PUBLIC RELATIONS

City of Sedona
Brand Platform
DRAFT

February 28, 2024

DVA ADVERTISING & PUBLIC RELATIONS

BRAND ELEMENTS



RESEARCH-DRIVEN

- Resident Sentiment Survey
- Community Listening Session
- Councilmember Interviews
- Lodging Council Listening Session
- TAB Listening Session
- Visitor Intercept Survey
- Chamber Interview
- Visitor and Spend Analysis
- Awareness and Perception Survey

KEY INSIGHTS

- Uniqueness: focus on how unique unique and special Sedona truly is – surroundings, art & culture, energy, dining, shops, lodging, etc.

- Sustainability: emphasize the idea of Sedona's need for respect and protection since it can never be replaced – a concept that applies to residents, stakeholders, and visitors.

- Viability: ensuring economic benefit is spread as evenly as possible year-round, long term, and across the commercial sector.

- Fulfilling: a visit to Sedona is unlike a visit anywhere else, and

- Quality of life: Resident quality of life underlies everything.

BRAND GOAL

Create harmony between the destination, residents, visitors, businesses, and the brand.

BRAND VALUES

SUSTAINABLE	COMMUNITY-MINDED	SINCERE
Stewardship-focused. Committed to the long-term viability of the community, and a tourism industry that is additive to the destination as opposed to extractive.	Protecting and enhancing year-round vitality. Fostering greater livability for residents, while also finding ways to enhance the visitor experience.	A genuine respect for and appreciation of all who live here or visit. Staying true to our principles. Highly accountable, with a strong moral and ethical compass.

BRAND VOICE

Sedona's brand voice is rooted in the three brand values: Sustainable, Community-Minded, and Sincere. The Voice aims to resonate with the hearts and minds of our audience. It's a Voice that speaks with warmth, wisdom, and sincerity, echoing the timeless allure and depth of experience found nowhere but Sedona. It's a voice that encourages preservation, and celebrates community, embodying the resilience and sustainability of the land and the community, be they visitors or residents.

Inspirational & Uplifting

Educational & Respectful

Friendly & Inviting

Authentic & Sincere

BRAND CHARACTERISTICS

SEDONA IS	SEDONA IS NOT
Fragile	Indestructible
One-of-a-kind	Run-of-the-mill
Vibrant	Vanilla
Active	Sedentary
Enchanting & Spiritual	Dull & Unmoving
Breathtaking	Commonplace
Authentic	Fabricated
Culturally enriched	Pedestrian
Artistic	Uninspired
Makers	Knock-offs
Sustainable	Disposable
A national treasure	A National Park

BRAND DESCRIPTION – INTRO

The Sedona brand platform is the foundation from which all future stewardship and marketing efforts will be built upon and measured against.

The brand description is one of the least visible elements of the broader brand platform, as opposed to the many public-facing elements it spawns. It is developed deliberately, and with very specific intention reflecting the research, interviews, perspectives and intents of residents, businesses, and visitors.

As such, the Sedona brand description should be realistic, aspirational, and inspirational to residents and visitors alike. Through words, it reflects not only what Sedona is today, but also what we want Sedona to be in the future. And as Sedona changes and evolves, so too will the brand description. Think of it as a living, breathing document that guides us and the work we do in education and marketing.

BRAND DESCRIPTION

There's no place else quite like it. Instantly recognizable. Profoundly captivating. The immensity of Sedona's natural beauty evokes feelings of wonder and connection.

For generations, and for countless years before the earliest Indigenous People inhabited Sedona, the towering red rocks, infinite dark skies, and prolific juniper, pine, and cypress trees have stood the test of time. From exhilarating to tranquil, Sedona's combination of natural wonders, spiritual energy, and artistic allure combine to foster a stronger sense of community, a greater sense of place, and a more intimate connection to the land.

In town, a lodging, dining, shopping, arts, and culture scene rivals that of cities many times its size, yet somehow Sedona manages to retain its endearing character and enduring charm. But that's exactly the beauty of Sedona. Here, residents, visitors, and a thriving business community embrace their place within a vibrant tapestry of community and nature.

There's also no place more precious. Silent, fragile, and vulnerable. There's only one Sedona, and how we care for, treat, and respect it today will determine its viability – and livability – for future generations. This land, this town, and the very fabric of Sedona have been entrusted to us. Residents and visitors alike, we are all stewards of this sanctuary.

Nowhere do so many pieces fit so perfectly together as they do right here. A special place to love, respect, cherish, and protect – and to live, work, and visit – alongside those who share our ethos.

There never has been – and there never will be – another place quite like it. Sedona.


SEDONA
Summer Stewardship Campaign Concepts

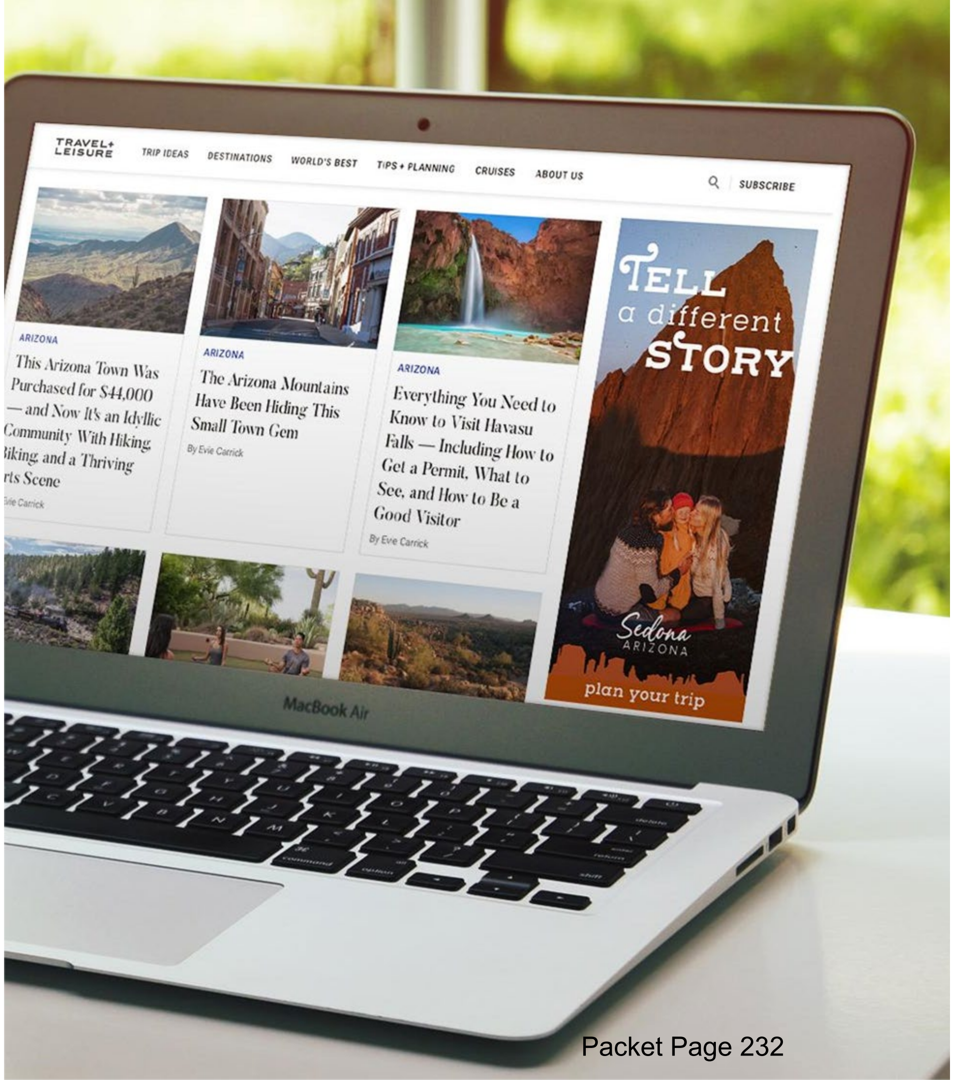
CONCEPT 1

TELL A DIFFERENT STORY

With this campaign, we invite visitors to be truly present in the moment, where the only status that matters is the one written in the lifelong memories you create. Sedona beckons you to tell a different story — one of thoughtfulness and respect. We know you'll love it here, because we love it here. Be here, and tell a different story.

Using the framework of "telling a different story" we can create additional in-market videos where the messages are more direct "stories" about how to be good stewards of Sedona and the surrounding area; staying on marked trails, avoiding areas of overuse, being polite and courteous to others, etc.

DIGITAL ADS



TRAVEL+ LEISURE
TRIP IDEAS
DESTINATIONS
WORLD'S BEST
TIPS + PLANNING
CRUISES
ABOUT US
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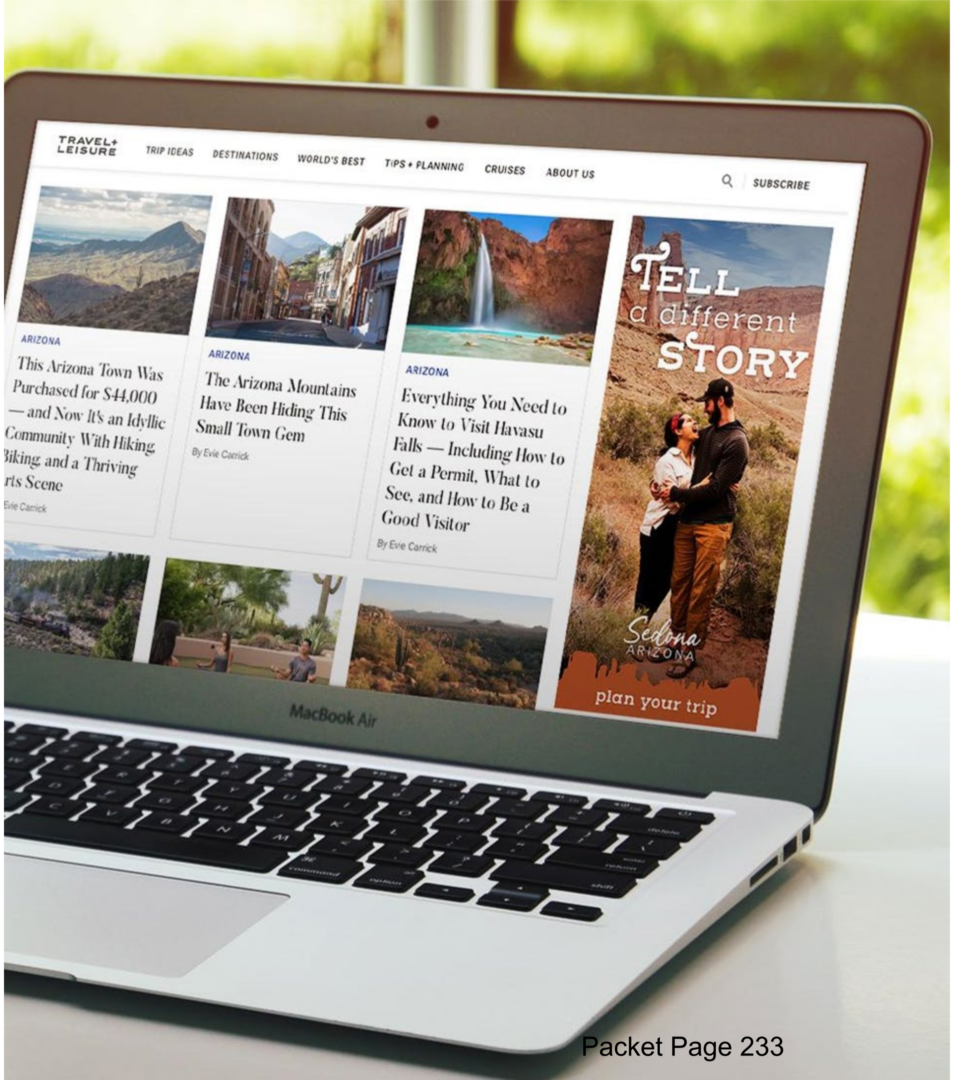
ARIZONA
This Arizona Town Was Purchased for $44,000 — and Now It's an Idyllic Community With Hiking, Biking, and a Thriving Arts Scene
ARIZONA
The Arizona Mountains Have Been Hiding This Small Town Gem
By Evie Carrick
ARIZONA
Everything You Need to Know to Visit Havasu Falls — Including How to Get a Permit, What to See, and How to Be a Good Visitor
By Evie Carrick
TELL a different STORY
Sedona ARIZONA
plan your trip
MacBook Air

DIGITAL ADS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ARIZONA
Everything You Need to Know to Visit Havasu Falls — Including How to Get a Permit, What to See, and How to Be a Good Visitor
By Evie Carrick
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Sedona ARIZONA
plan your trip
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PRINT ADS

Body Copy

Come to Sedona to experience a magic you can't find anywhere else. Seek a new adventure and renew yourself. While you're here, slow down and savor the journey. It's worth it. Explore responsibly and remember to be respectful. You'll love it here because we love it here. And when you love something, you care for it. That's the Sedona story. What's yours?

Tell a different story.
ScenicSedona.com

PRINT ADS

Body Copy

On Sedona's trails, where ancient rocks whisper and breezes carry stories, tread lightly and with respect. Here, every footstep counts toward conserving the splendor for generations to come, and your story is forever linked with ours.

Be here, and tell a different story.
ScenicSedona.com

Alt

Seek out the reward of a view well earned and where each step on Sedona's trails brings you closer to nature's heart and your own. Remember, the journey's beauty is matched only by the commitment to preserve it for those who follow.

Be here, and tell a different story.
ScenicSedona.com

Video

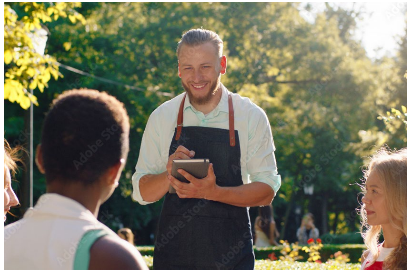
Sweeping shot of majestic red rock formations of Sedona at sunrise

VO: Come to Sedona, to experience a magic You can't find anywhere else.

We see a family set off for a hike.

VO: Allow yourself to disconnect and be in the moment with each other

They pass a stay on trail sign



Cut to the same family at a local restaurant. We can tell they're being polite with the server.

VO: While you're here, slow down and savor the journey. It's worth it

.

An upclose shot of the parents holding hands, finally having time to reconnect

VO: We know you'll love it here. Because we love it here.

Cut to wide shot of family

VO: And when you love something, you care for it.

End with a beautiful scenic shot of the rocks at night with a sky full of stars.

VO: That's the Sedona story.

VO: What's yours

CONCEPT 2

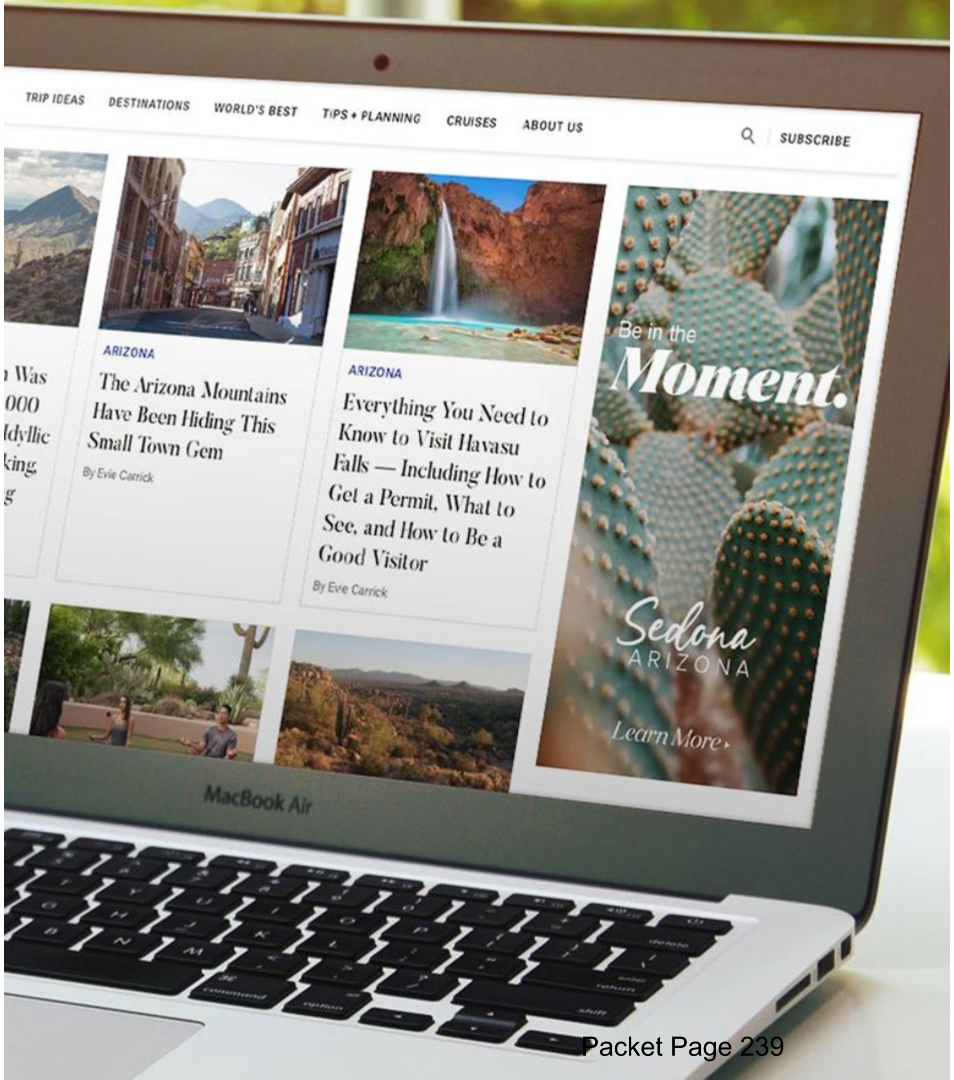
IN THE MOMENT

In a world where the focus often lies on capturing images for social media validation, the essence of living in the present moment is often overshadowed. This concept emphasizes the importance of the small things we can do that have big impact. This in turn can create a deeper respect for natural places and the local community while encouraging better habits.

This idea also lends itself to creating more educational videos where we can can focus on some of the detailed ways that people can be responsible and effect change; for example, leave no trace, staying on marked trails, avoiding areas of overuse, being polite and courteous to others, etc.

DIGITAL ADS

3 frame Animated ad out-of-market



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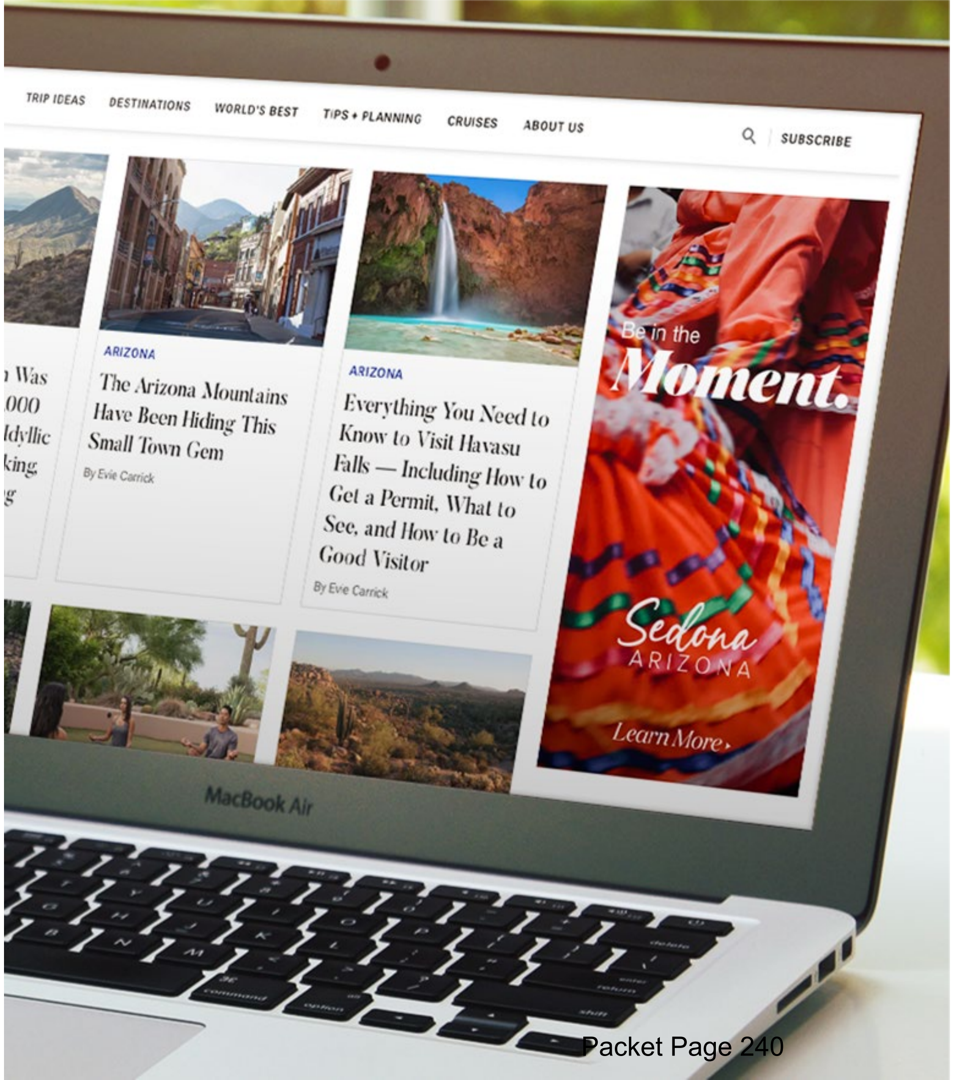

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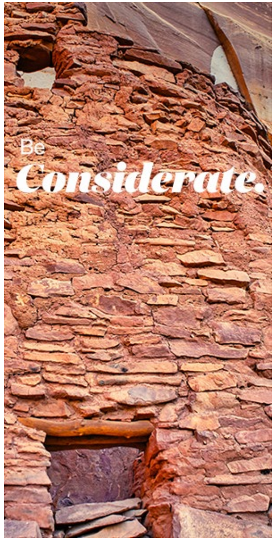

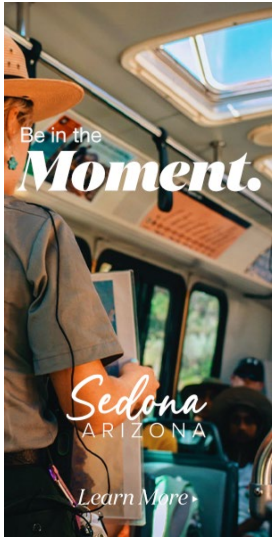

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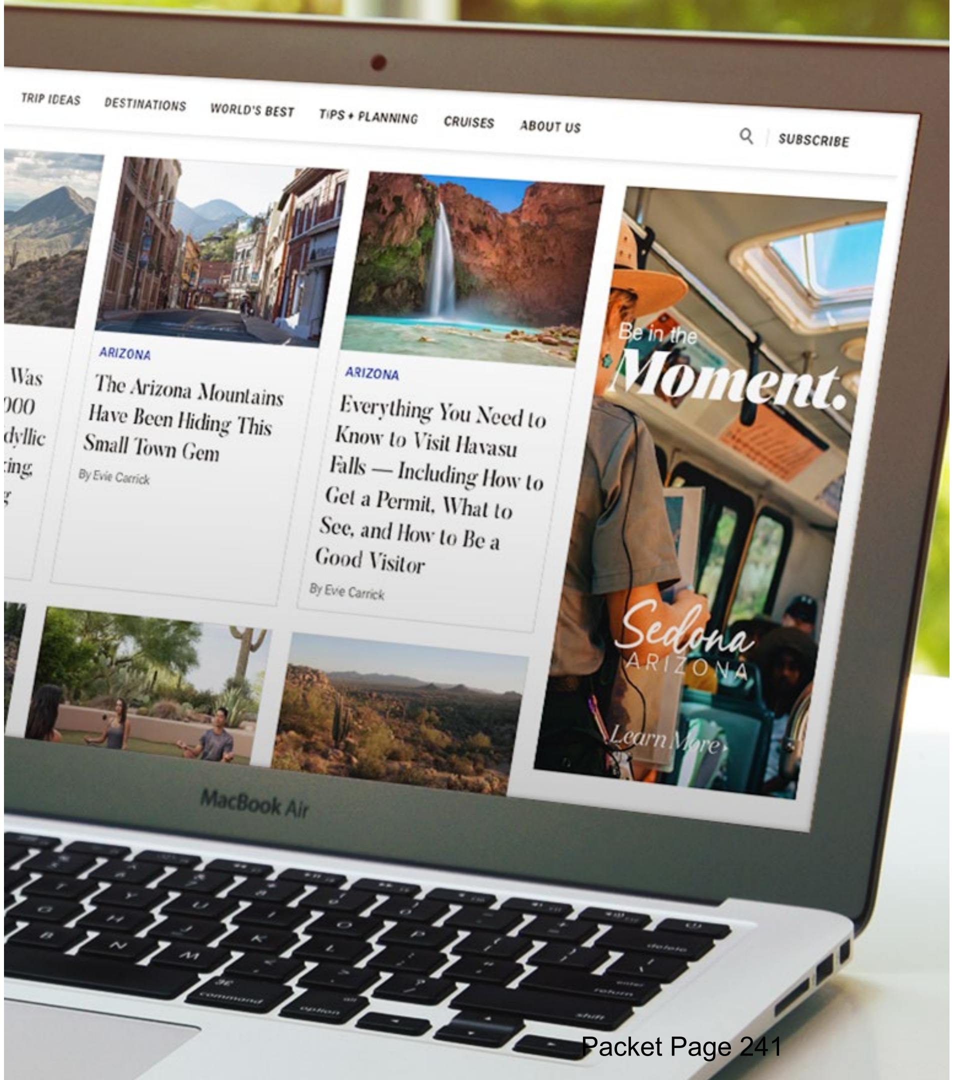

PRINT ADS

Body Copy

It's in the details.

In Sedona there are plenty of big moments, but it's the small actions that count. Staying on trail, leaving no trace, and being respectful make all the difference. And, as stewards of this land, it's nice to slow down and appreciate the details.

Join us and embrace the moment.

Learn more at ScenicSedona.com

PRINT ADS

Body Copy

It's in the details.

Discover the connection that comes from engaging with the desert's beauty. Embrace each moment with mindfulness, where simple acts of care nurture a culture of respect and conservation for our natural wonders.

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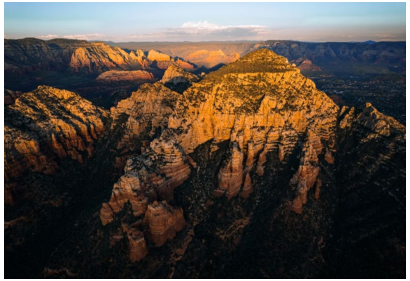
Video – out-of-market stewardship

Fade in. Quiet and still except natural ambient sounds (crickets, frogs,, wind)

VO: In Sedona there are plenty of big moments…

Sweeping, slow panning shot of Sedona rock formations with hiker.



Cut to another grand sweeping shot.

Another wide shot, yet getting more intimate, Include hiker.

VO: but it's the small actions that count.

Another ambient outdoor shot, closer up, even more intimate now.

VO: Staying on trail, leaving no trace…

Striking shot of hikers appreciating/engaging with surroundings.

VO: …and being respectful make all the difference.

Close up detail of cacti, ambient natural sounds and movement.

VO: And, as stewards of this land, it's nice to slow down and appreciate the details.

Stationary shot. Dynamic movement of fabric flowing and bodies in motion, across frame. Sounds of people, music, festival.

VO: Join us and embrace the moment.

Video – in-market education

Fade in. Quiet and still except natural ambient sounds.

VO: In Sedona there are plenty of big moments…

Sweeping, slow panning shot of stars and signage of Dark Sky designation.

Cut to inspiring shot of Native dwelling or petroglyphs, that command reverence.

Stationary shot. Small movements from animal.

VO: Yet, a place this grand requires small, thoughtful choices.

Another ambient outdoor shot, closer up, intimate, showing trail signage.

VO: Staying on trail, leaving no trace…

Shot of Sedona Shuttle making a stop and letting out hikers.

VO: …and being aware, respectful, and considerate make all the difference.

Close up of hiker appreciating surroundings.

VO: And, as stewards of this land, we're in this together. We need your help to preserve and protect what makes Sedona, Sedona.

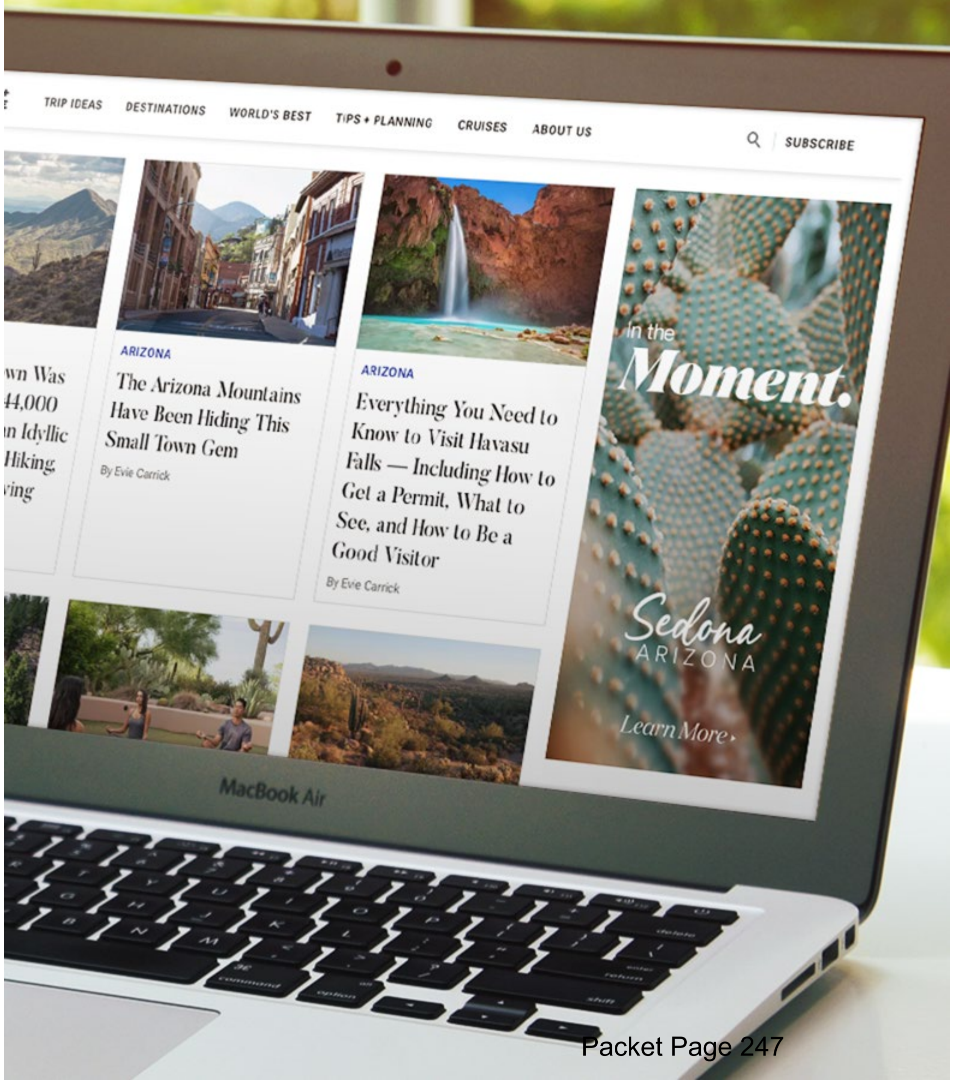
Stationary shot from inside shuttle with interpretive speaker engaging with riders.

VO: Join us and embrace the moment.

CONCEPT 2 - SOFTER OUT-OF-MARKET MESSAGING

DIGITAL ADS

3 frame Animated ad out-of-market



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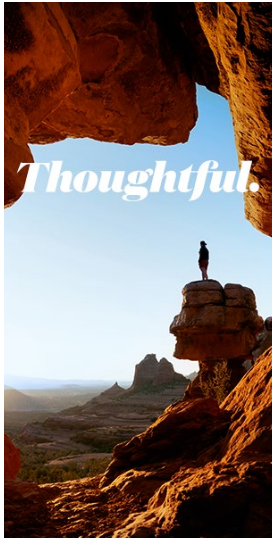

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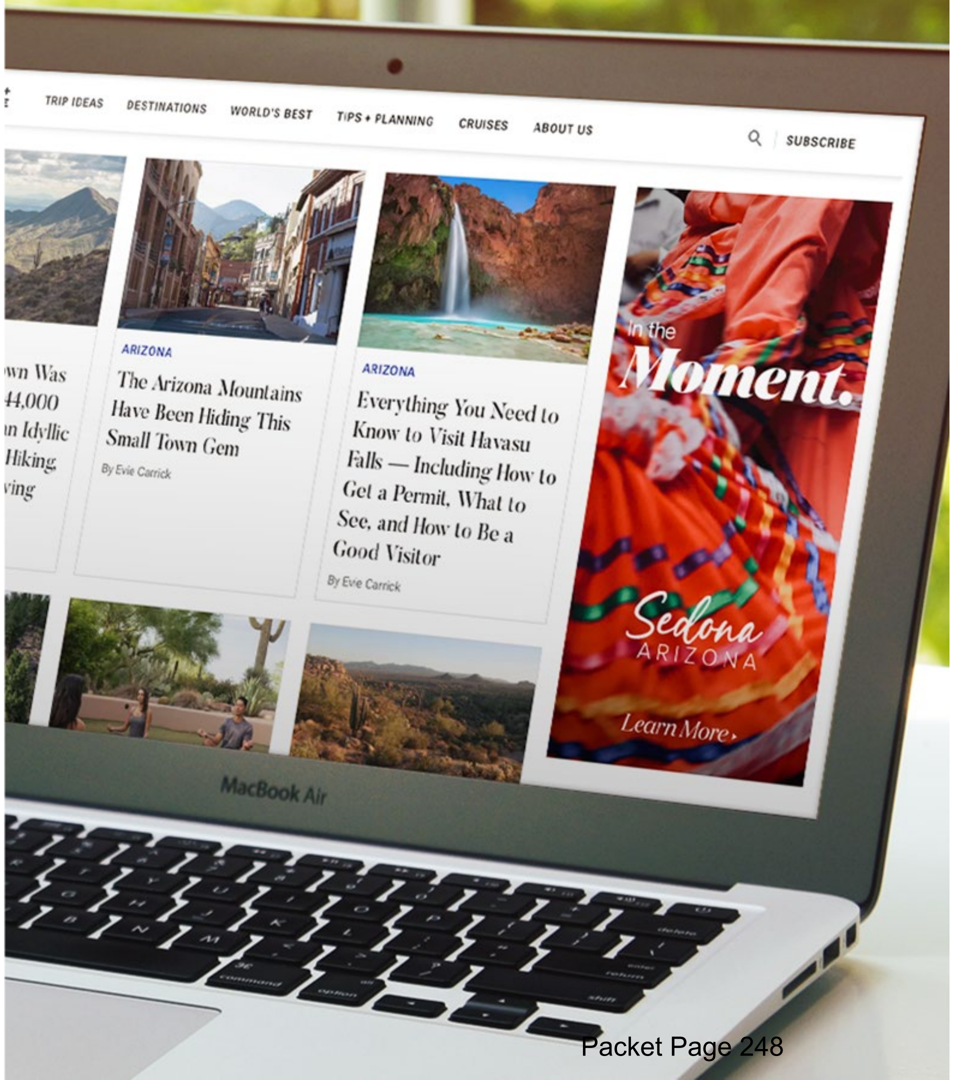

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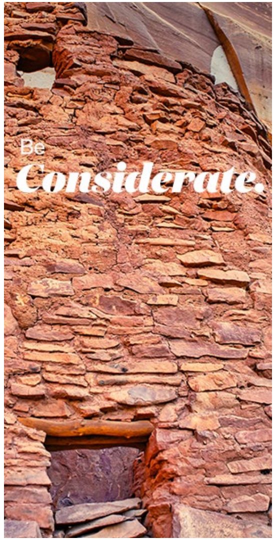

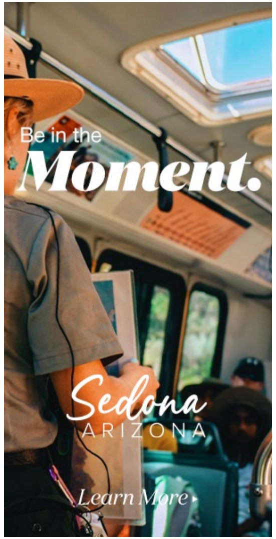

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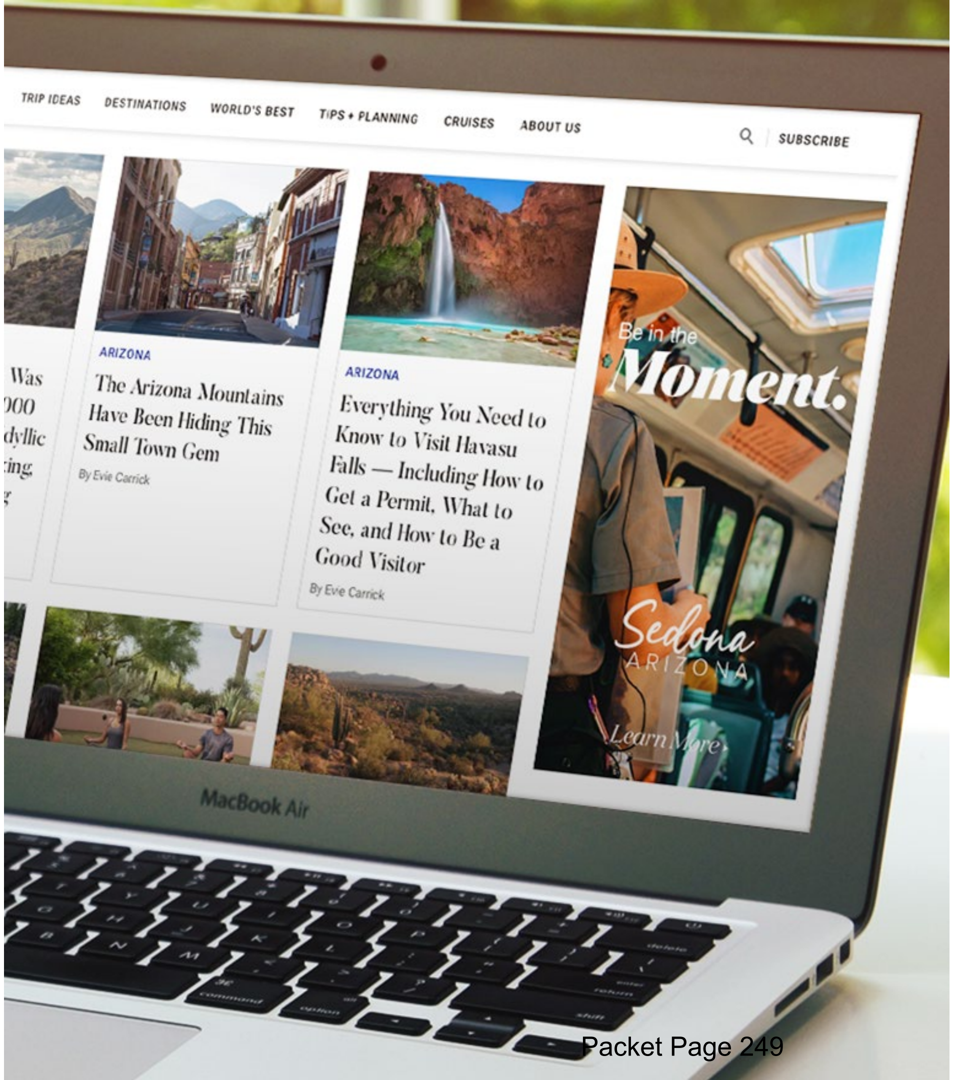

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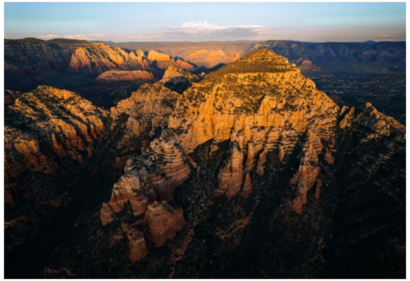

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SEDONA

2024 Summer Stewardship Campaign Media Plan

CAMPAIGN GOALS

Campaign Goals

- Convey a stewardship message within Sedona, in Phoenix and key summer visitation markets
- Drive a positive return on ad spend (ROAS) above 5x for the Datafy portion of the buy
- Drive demand and bookings for Sedona lodging properties
- Generate attributable economic impact for the City of Sedona

MARKET ANALYSIS

Top Visitation Markets - Lodging/Summer

6/1/19 — 8/31/19	5/1/21 — 8/31/21	5/1/22 — 8/31/22	5/1/23 — 8/31/23
Phoenix -Prescott **39.37%**	Phoenix -Prescott **39.55%**	Phoenix -Prescott **47.05%**	Phoenix -Prescott **33.9%**
Los Angeles **5.81%**	Los Angeles **6.97%**	Los Angeles **11.98%**	Los Angeles **8.2%**
Tucson -Sierra Vi... **3.35%**	New York **3.58%**	Tucson -Sierra Vi... **6.16%**	New York **4.56%**
New York **2.8%**	Tucson -Sierra Vi... **3.35%**	New York **4.04%**	Tucson -Sierra Vi... **3.93%**
Chicago **2.17%**	Las Vegas **1.86%**	Chicago **2.65%**	Chicago **2.66%**
Houston **1.71%**	Chicago **1.83%**	Las Vegas **2.63%**	Dallas-Ft. Worth **2.21%**
Dallas-Ft. Worth **1.69%**	San Diego **1.67%**	Dallas-Ft. Worth **2.01%**	Las Vegas **2.17%**
Atlanta **1.52%**	Dallas-Ft. Worth **1.62%**	San Diego **1.82%**	San Diego **1.98%**
Las Vegas **1.39%**	San Francisco-O... **1.54%**	Denver **1.46%**	Houston **1.7%**
San Diego **1.33%**	Philadelphia **1.44%**	Houston **1.38%**	Atlanta **1.69%**

Top Markets by 4-Year Ave. % Visitation	
Phoenix	40%
Los Angeles	8.24%
Tucson	4.20%
New York	3.75%
Chicago	2.33%
Dallas	2.08%
Las Vegas	2.01%
San Diego	1.70%
Houston	1.47%
Atlanta	1.35%

Visitation metrics were filtered by those that stayed in Sedona lodging properties only.

Top Spend Markets

JUNE 2023

Phoenix-Prescott, AZ	$1,368,830
Los Angeles, CA	$783,316
Tucson-Sierra Vista, AZ	$207,008
Seattle-Tacoma, WA	$175,780
Dallas-Ft. Worth, TX	$170,973
San Francisco-Oakland-San Jose, CA	$170,234
San Diego, CA	$170,006
Chicago, IL	$148,055
Denver, CO	$106,295
Washington, Dc-Hagerstown, MD	$105,336

JULY 2023

Phoenix-Prescott, AZ	$1,617,336
Los Angeles, CA	$730,713
Tucson-Sierra Vista, AZ	$223,151
San Francisco-Oakland-San Jose, CA	$164,048
Dallas-Ft. Worth, TX	$159,832
San Diego, CA	$129,043
Chicago, IL	$119,999
Seattle-Tacoma, WA	$115,097
New York, NY	$109,211
Las Vegas, NV	$105,259

AUG 2023

Phoenix-Prescott, AZ	$1,124,034
Los Angeles, CA	$403,804
Tucson-Sierra Vista, AZ	$128,400
Chicago, IL	$116,192
Seattle-Tacoma, WA	$113,929
San Francisco-Oakland-San Jose, CA	$108,272
San Diego, CA	$95,866
New York, NY	$86,959
Dallas-Ft. Worth, TX	$79,434
Washington, Dc-Hagerstown, MD	$67,990

JUNE 2022

Phoenix-Prescott, AZ	$1,912,514
Los Angeles, CA	$865,260
San Francisco-Oakland-San Jose, CA	$256,801
Tucson-Sierra Vista, AZ	$245,381
Chicago, IL	$240,655
Philadelphia, PA	$214,026
Seattle-Tacoma, WA	$208,917
Dallas-Ft. Worth, TX	$202,417
Denver, CO	$192,097
New York, NY	$180,256

JULY 2022

Phoenix-Prescott, AZ	$2,134,691
Los Angeles, CA	$728,152
Tucson-Sierra Vista, AZ	$298,387
Denver, CO	$244,444
San Francisco-Oakland-San Jose, CA	$213,350
Dallas-Ft. Worth, TX	$189,089
New York, NY	$172,072
Seattle-Tacoma, WA	$167,219
San Diego, CA	$152,115
Las Vegas, NV	$135,803

AUG 2022

Phoenix-Prescott, AZ	$1,629,112
Los Angeles, CA	$664,363
Chicago, IL	$279,987
San Francisco-Oakland-San Jose, CA	$261,768
Dallas-Ft. Worth, TX	$260,190
Denver, CO	$252,060
Tucson-Sierra Vista, AZ	$235,701
Seattle-Tacoma, WA	$235,616
New York, NY	$214,543
Washington, Dc-Hagerstown, MD	$199,235

Top Summer Spend Markets

Top Market by Ave. Spend	
Phoenix	41.8%
Los Angeles	17.81%
Tucson	5.76%
San Francisco	5.02%
Dallas	4.54%
Seattle	4.35%
Chicago	4.3%
Denver	4.25%
New York	3.30%
San Diego	3.19%

We review spend data from Symphony for the period of June through August for both 2022 and 2023.

The numbers in the table represent the percentage of the total spend during this time period.

Top Summer Markets Summary

Top Markets by 4 Year Ave. % Visitation	
Phoenix	40%
Los Angeles	8.24%
Tucson	4.20%
New York	3.75%
Chicago	2.33%
Dallas	2.08%
Las Vegas	2.01%
San Diego	1.70%
Houston	1.47%
Atlanta	1.35%

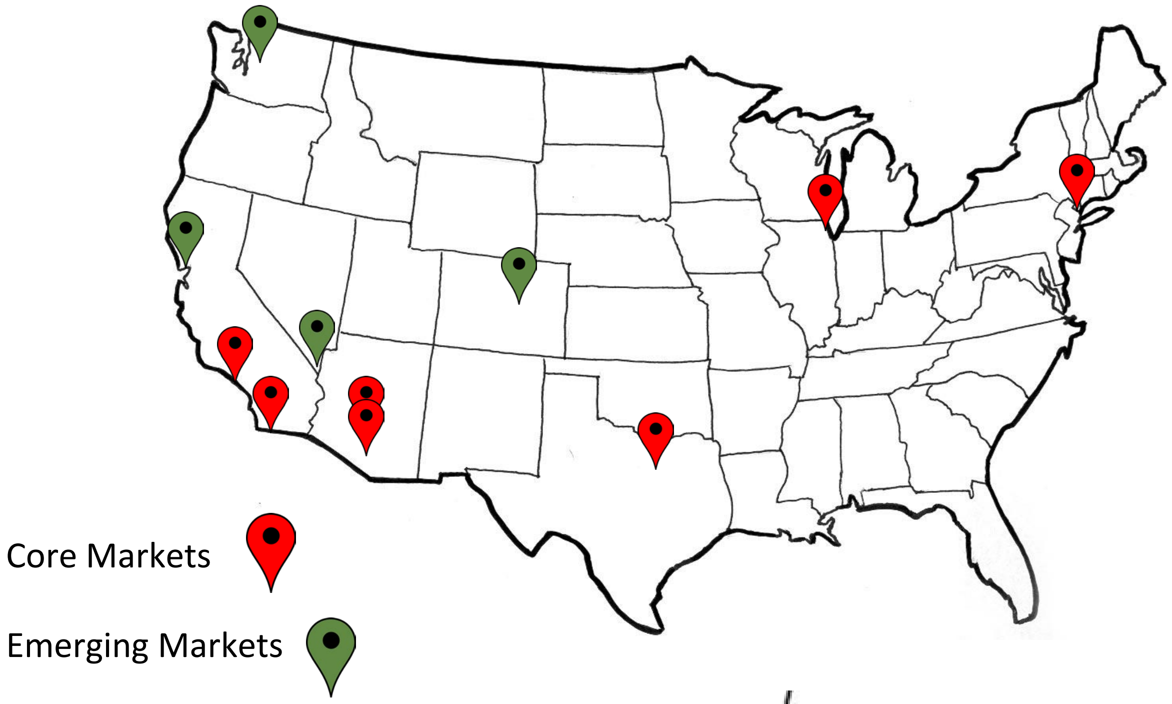
Top Market by Ave. Spend	
Phoenix	$1.63M
Los Angeles	$694,000
Tucson	$224,000
San Francisco	$195,000
Dallas	$176,000
Seattle	$169,000
Chicago	$167,000
Denver	$165,000
New York	$128,000
San Diego	$124,000

Green highlighted markets showed up in both data sets. These would be the recommended target markets for the summer campaign. Recent awareness and perception research also showed that residents of Phoenix are 20% more likely to visit Sedona during the months of May-August, making them not only an appropriate target for summer visitation, but the prime audience for stewardship messaging.

With an increased budget for summer, DVA would also recommend continuing the marketing efforts in Seattle, Las Vegas, Denver, and San Francisco.

MEDIA RECOMMENDATION

Recommended Dual Strategy



Attraction

- Sustainable undertones in creative
- Delivered in all Core and Emerging markets
- Attribution-based marketing to measure ROI
- Highly curated audiences detailing:
  - HHI, Household size
  - Personas developed based on research phase
- Includes: Phoenix and Los Angeles

In-Market

- Firm management tones in creative
- Delivered in Sedona and a 25-miles radius
- Broadest audience targeting
  - Optimized for reach and impressions to reach as many visitors and residents as possible, with frequency, regardless of HHI, Household size, etc.

Campaign Details

Full recommendation

- Media spend:
  - Attraction Markets: $80,000
  - In-Market: $20,000
- Flight: May 1 to August 15, 2024
- Tactics: Paid social media; Programmatic native, display, video; paid search
- Attraction Markets: All Core and Emerging markets (includes Phoenix and Los Angeles)
  - Message: Destination attraction through stewardship
- In-Market: Geo-fenced radius around the city of Sedona
  - Message: Firm destination stewardship and management

Without Phoenix and Los Angeles

- Media spend:
  - Attraction Markets: $80,000
  - In-Market: $20,000
- Flight: May 1 to August 15, 2024
- Tactics: Paid social media; native, display, video, and retargeting; paid search
- Attraction Markets: All Core and Emerging markets (does not include Phoenix and Los Angeles)
  - Message: Destination attraction through stewardship
- In-Market: Geo-fenced radius around the city of Sedona
  - Message: Firm destination stewardship and management

In-market stewardship only

- Media spend:
  - In-Market: $20,000
- Flight: May 1 to August 15, 2024
- Tactics: Paid social media; native, display, video
- In-Market: Geo-fenced radius around the city of Sedona
  - Message: Firm destination stewardship and management

THANK YOU