

AGENDA



3:00 P.M.

CITY COUNCIL MEETING

WEDNESDAY, AUGUST 14, 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 =

- AB 2912 **Discussion/possible action** regarding a reallocation of 2023 CDBG funds for critical home repair funding for low-income households, including seniors and disabled individuals, to be managed by Verde Valley Habitat for Humanity.
- AB 3076 **Discussion/possible direction** regarding Tourism Visitor Data and Draft Strategic Plan.
- 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:

- To consult with legal counsel for advice regarding matters listed on this agenda per A.R.S. § 38-431.03(A)(3).
- Return to open session. Discussion/possible action regarding executive session items.

5. ADJOURNMENT

Posted: 08/08/2024

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 2912
August 14, 2024
Special Business**

Agenda Item: 3a

Proposed Action & Subject: Discussion/possible action regarding a reallocation of 2023 CDBG funds for critical home repair funding for low-income households, including seniors and disabled individuals, to be managed by Verde Valley Habitat for Humanity.

Department	CD-Housing/Jeanne Frieder
Time to Present	10 minutes
Total Time for Item	20 minutes
Other Council Meetings	January 24, 2023 and December 12, 2023
Exhibits	None

Finance Approval	Reviewed RMS 8/5/24	Expenditure Required
City Attorney Approval	Reviewed 8/6/24 KWC	
City Manager's Recommendation	Recommend approval ABS 8/6/24	
		Amount Budgeted
		\$ 402,110.00
		\$ 402,110.00
		Account No. 16-6340-34-6405 (Description)

SUMMARY STATEMENT

Background: The Community Development Block Grant (CDBG) is a federal Housing and Urban Development (HUD) program that provides funds for housing and community development activities. The Arizona Department of Housing (ADOH) in conjunction with Northern Arizona Council of Governments (NACOG) administers and plans the annual allocations and provides technical assistance for applications for northern Arizona. Through their process, the City of Sedona is eligible for funds every four years. We are currently in the funding cycle for 2023 CDBG. The total allocation for Sedona for this round is \$402,110. A portion of this funding, approximately 15%, must be allocated to NACOG for technical assistance and administration of the grant.

CDBG funds can be used for a diverse range of projects. However, to be eligible for funding, projects must meet at least one of three national objectives:

- At least 51% of persons who benefit from the project must be low-to-moderate income.
- Reduce or eliminate slums or blighting conditions
- Address a particular urgency (such as a natural disaster or health threat)

On January 24, 2023, City Council reviewed the following project proposals:

1. Transitional housing proposed by Steps to Recovery: \$400,000 to support the acquisition of transitional housing for individuals impacted by substance abuse.
2. A home repair program proposed by Verde Valley Habitat for Humanity: \$400,000 to fund a home repair grant program for low-to-moderate income homeowners, including seniors and disabled individuals in need of critical home repair.
3. A shelter or day-use facility proposed by City Housing staff: \$400,000 to acquire property suitable for a day resource center or emergency shelter for Sedona area unsheltered residents, to be operated by a non-profit partner to be determined.
4. A strategic plan to end homelessness proposed by City Housing staff: \$10,000 to hire a consultant to identify needs and guide the City's activities related to homelessness over the next several years.

At the January 24, 2023 meeting, City Council selected Steps to Recovery Homes to receive its 2023 CDBG allocation towards the acquisition of transitional housing for individuals impacted by substance abuse.

On December 12, 2023, City Housing staff and Steps to Recovery Homes came before City Council to provide a status update on the transitional housing project. At that time, a suitable property had not been identified and a plan for filling the funding gap required to purchase real estate had not been determined. Discussions were held with ADOH and NACOG to clarify program details. Per these discussions, in May it was clarified by ADOH that a property for this program is required to be located within the city of Sedona, which narrowed the search. Due to this, in addition to scheduling deadlines (the purchase of a property, the Environmental Review, and the Contract deadlines) it was determined that the deadlines would not be met. Therefore, to retain funding for 2023 CDBG funding, a reallocation was deemed necessary by Arizona Department of Housing.

The purpose of this agenda item is discussion and direction regarding the reallocation of CDBG funding to meet community need, program requirements and contract deadlines, so that the city of Sedona can retain the funding allocation. The home repair program for low-to-moderate income homeowners proposed in January 2023 by Verde Valley Habitat for Humanity will meet a critical community need and will extend the life of the housing inventory within the city.

Sedona has approximately 3600 owner-occupied housing units with 35% of these units occupied by households with annual incomes of less than \$50,000. Construction, labor and material costs continue to soar, while many homeowners in Sedona remain on a lower or fixed income. Critical home repairs that maintain the upkeep of Sedona homes will prevent unsightly blight and will create a safe and healthy home environment.

The home repair program to benefit low-to-moderate income households, including seniors and disabled individuals, will be managed by Verde Valley Habitat for Humanity and will aid those homeowners in need of critical home repair. The target population has a household income that falls at or below 80% AMI. The home must be an owner-occupied primary residence that is current with mortgage payments, property taxes and property insurance policies, and in need of home repair. All construction/repair work will be facilitated by, and project managed by Verde Valley Habitat for Humanity. The program is expected to help at least 12 households, approximately 20 – 75 individuals depending on family size. The maximum assistance per household is \$30,000.

If approval to move forward is granted by City Council today, a Public Meeting will be noticed and scheduled for September 10, 2024, where Housing staff will be requesting approvals for the following: a Resolution to submit a new application to Arizona Department of Housing for

CDBG reallocation of funds to the Sedona home repair program managed by Verde Valley Habitat for Humanity; a Resolution approving the housing repair guidelines, and a Resolution to approve a contract with Arizona Department of Housing, authorizing City Manager, Anette Spickard to execute the contract, which is subject to approval by City Attorney, Kurt Christianson. If these approvals are granted, a new application will be prepared and submitted to Arizona Department of Housing by approximately September 15, 2024, and all necessary steps will be executed in order for the City to enter into a contract with Arizona Department of Housing by the September 30, 2024 deadline.

Climate Action Plan/Sustainability Consistent: Yes - No - Not Applicable

This project meets the Climate Action Plan tenets of equity, including housing equity, ensuring that members of the community have equitable, habitable, improved housing with weatherization from the elements, leading to better health and well-being.

Board/Commission Recommendation: Applicable - Not Applicable

Alternative(s): n/a

MOTION

I move to: authorize the reallocation of 2023 CDBG to Verde Valley Habitat for Humanity Sedona Home Repair Program, and direct staff to move forward with reallocation activities.



**CITY COUNCIL
AGENDA BILL**

**AB 3076
August 14, 2024
Regular Business**

Agenda Item: 3b
Proposed Action & Subject: Discussion/possible direction regarding Tourism Visitor Data and Draft Strategic Plan.

Department	City Manager/Lauren Browne
Time to Present	1 hour
Total Time for Item	2 hours
Other Council Meetings	March 27, 2024
Exhibits	A. Visitor Study B. Draft Tourism Strategic Plan C. Draft Initiatives Tracking Document

Finance Approval	Reviewed RMS 8/5/24	Expenditure Required
City Attorney Approval	Reviewed 8/6/24 KWC	
City Manager's Recommendation	Provide feedback on the draft Strategic Plan ABS 8/6/24	
		Amount Budgeted
		\$ N/A
		\$ N/A
		Account No. (Description)

SUMMARY STATEMENT

Background:

In 2023, the City created an in-house Tourism Program, with City Council designating the City of Sedona as the official Destination Management Organization as recognized by the Arizona Office of Tourism. In its first year, the Tourism Program had many goals, but two big goals included getting a comprehensive understanding of what Sedona visitation numbers recently were and where these people came from, and creating a Tourism Strategic Plan to chart the direction of the Tourism Program for the next 18 months to 2 years.

Visitor Study

The City hired Kimley-Horn and Associates to conduct a thorough Visitor Study to better understand the annual variation of worker, resident and visitor travel patterns throughout the City limits, short-term versus long-term tourists and how these visitor patterns may be changing over time or across seasons. By understanding these travel patterns, staff would also have a deeper understanding of transportation infrastructure strains in Sedona. Additionally, a high water mark would be established, which helps shed light onto how many visits at that point in

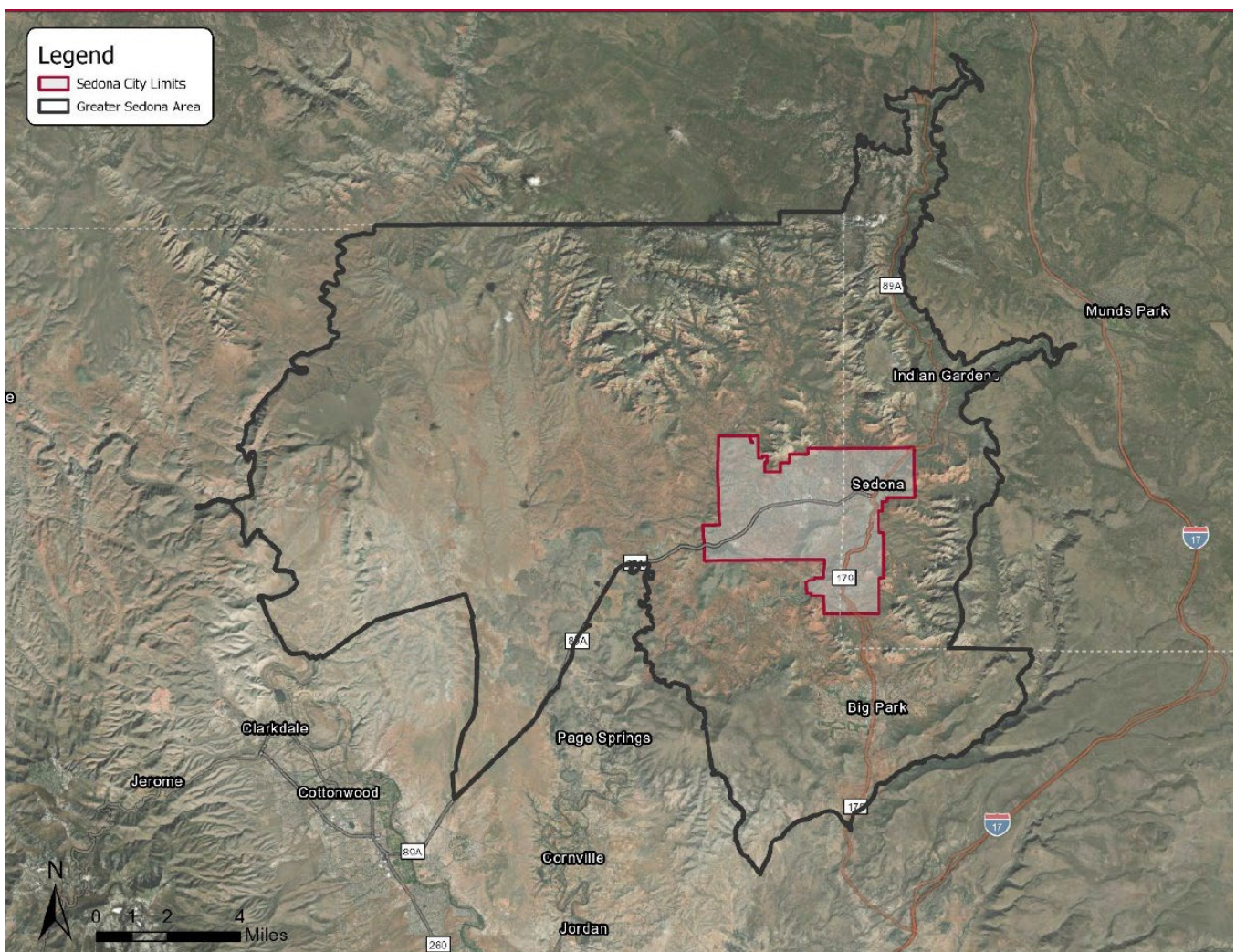
time it took to cross the threshold into seeing significant negative effects to resident quality of life.

Kimley-Horn's analysis concluded that there were an estimated:

- 3.16 million visitor person trips (visits) in 2019
- 3.28 million visits in 2021
- 3.22 million visits in 2022

While the differences between these numbers as a whole may not seem significant, there were several months that saw big year-over-year bumps in visitation. For example, May 2021 saw 36,000 more visits than May 2019 (12% increase) and November 2021 saw 46,000 more visits than November 2019 (19% increase).

Regarding methodology, staff and Kimley-Horn were deliberate in deciding what is defined as a visitor. Ultimately, a visitor in this study is someone who doesn't reside or work in the black area shown below (the greater Sedona area including the Village of Oak Creek) and makes at least one trip that starts, ends or passes through the City Limits (the red outline below). Note that the black boundary does not include areas such as Cottonwood, Cornville, Camp Verde, etc.



A single visitor can thus make multiple visits in the city in any given day, and a single visitor can stay in the city for multiple nights. A visitor can also make several unique visits to the city throughout the year. Visitors can include tourist or recreational travelers, as well as those from nearby communities who do not live or work in Sedona but still come to Sedona for visits such as visiting friends or family, going to the movies, shopping, recreation, or other more frequently-occurring “non-home/work” trips.

Regarding how a visit is calculated, a person who lives in Cottonwood who doesn't work in Sedona, but comes to Sedona 20 times per year, counts as 20 visits. Whereas, a person from Phoenix who comes 2 times per year counts as 2 visits.

This is an important distinction because the Visitor Study says that within Arizona, across all lengths of stays, residents of Yavapai County are the highest percentage of all visits (33% of all visitors and 62% of visitors from Arizona). This skews heavily toward day trips (69% of all single-day visitors). From a review of the underlying visitor data census tracts, most of these Yavapai County visitors are from communities such as Cottonwood, Clarkdale, Cornville, and Camp Verde.

Regarding data sources, Kimley-Horn used big data vendors StreetLight Data and Replica to analyze anonymous mobile device and connected vehicle data, in addition to ADOT traffic counter data, sales and bed tax revenue data, hotel occupancy data, and wastewater flow data that acted either as extra data sources or as a cross check.

Additional interesting conclusions from the analysis include:

- Approximately two-thirds of visitors do not stay the night.
- 54% of visitors are from Arizona.
- For stays of one night or more, Maricopa County is the most represented Arizona County and comprises 17% of all one-night visitors (including out-of-state) and 19% of all two-night visitors (including out-of-state). Maricopa County represents 12% of all visitors overall across all lengths stays.
- It is estimated that approximately 38% of Sedona workers live within the City limits.

Regarding unique visitors, this number is more challenging to calculate and there are significant limitations in the data. However, as a very rough approximation, Kimley-Horn estimates there were:

- 1.36 million unique visitors in 2019
- 1.42 million unique visitors in 2021
- 1.39 million unique visitors in 2022

Staff plans on including the number of unique visitors in the final version of the Visitor Study because the number is valuable but will emphasize data limitations and how this number is very much an approximation.

In addition to using this study as a high water mark for visitation in Sedona, going forward, staff will use it in many ways, including to inform marketing decisions. For example, knowing that the majority of our day trip visits come from Yavapai County helps to focus education campaign considerations.

For the full report, reference Exhibit A.

The cross-check on the annual visitation numbers

To cross-check Kimley-Horn’s visitation numbers, staff also hired Tourism Economics to calculate annual visitation from 2019 – 2022. The City received the following annual visitation numbers:

Sedona Visitor Statistics	2018	2019	2020	2021	2022	2022	2022
						v 2019	v 2021
Hotel visitors	906,510	924,995	793,503	976,675	896,298	-3.1%	-8.2%
Vacation rentals visitors	322,789	419,501	431,389	496,539	507,494	21.0%	2.2%
Other visitors	138,430	142,332	142,532	146,931	146,426	2.9%	-0.3%
Overnight visitors	1,367,729	1,486,828	1,367,424	1,620,145	1,550,218	4.3%	-4.3%
Day visitors	1,468,218	1,515,009	1,377,722	1,666,530	1,610,103	6.3%	-3.4%
Total visits	2,835,947	3,001,838	2,745,146	3,286,675	3,160,322	5.3%	-3.8%

Note that similar to the Kimley-Horn estimates, these numbers are not unique visitors, but instead are visits, in which one person can make just one or several visits in one year. The Tourism Economics’ definition of a visitor is anyone who stayed overnight or traveled more than 50 miles to the destination. This would mean that compared to the Kimley-Horn estimates, the Tourism Economics estimate would be light because it didn’t account for the day trippers from Yavapai County, but none the less, the trend line between the two studies is similar.

Highlights from the Tourism Economics estimates include:

- In 2022, the estimated the number of visitors to Sedona was 3.16 million people, down 4% from the prior year.
- Day visitors reached 1.61 million in 2022 (down 3%), compared to overnight visitors of 1.55 million (down 4%).
- Overall, visits to Sedona were 5% above 2019 levels in 2022.
- This comes after total visitors reached a record 3.29 million in 2021.
- The vacation rental segment has grown fastest over the past 5 years, while hotel visitors fell from its 2021 peak.

Regarding methodology, to build the overnight visitation model, Tourism Economics sourced Smith Travel Research data for hotel demand, KeyData for short term rental demand and U.S. Census data for second homes. Tourism Economics also assessed room supply in Sedona and accounted for visitors of friends and relatives, as well as the important time-share segment. Visitor survey data offered an extra data point for the analysis.

For the day segment of the model, Tourism Economics was informed by geolocation data, survey data and actual state/national park visitation data.

Draft Tourism Strategic Plan

This plan (Exhibit B) is a roadmap that outlines the steps the Destination Management Organization (DMO) will take in the next 18 months – 2 years to accomplish the imperatives listed. It is unique in that it does not contain narrative around how the City got to this point in the draft of the plan. Instead, it is meant to be a digestible, one-page action plan that outlines the Tourism Program’s:

- Vision
- Mission
- Position
- Imperatives

- Initiatives

Then, in an accompanying spreadsheet document (Exhibit C), it outlines the actions and measures of success that will occur to meet the imperatives. In the coming weeks, the spreadsheet will also detail who the staff lead is on each initiative and a Gantt chart will identify when all of these actions will be accomplished.

The amount of stakeholder engagement was significant during this process and included: the Lodging Council; the president and CEO of the Sedona Chamber of Commerce and Tourism Bureau; the Mayor, Vice Mayor and City Councilors; interviews with stakeholders representing the arts, environmental groups, transportation, recreation and businesses; the Tourism Advisory Board; the community at large; and three surveys done in conjunction with the Tourism Program's marketing firm: the resident sentiment survey, the visitor intercept survey and the awareness and perception survey.

Once the research portion of this project was completed, over the course of several months in the first half of 2024, the City's tourism team met many times to iron out the items listed in the plan.

Most recently in July, staff took the draft plan to the Tourism Advisory Board. Their feedback included:

- Making it more obvious that a main goal of the DMO is to support local businesses
- Calling out that a main goal of the DMO is to manage the destination, alongside stewarding the destination
- Expand our initiatives to be more specific on the importance of data collection and its impact on decision making

The current draft includes the board's feedback, as staff agreed with the suggested edits.

Ties to the Sustainable Tourism Plan

The tourism team specifically went through the pillars, objectives and tactics of the Sustainable Tourism Plan, and tried to carry over intentions from that plan into the Strategic Plan. The team also recognized that while the Sustainable Tourism Plan is admirable, it also seemed difficult to implement because of the reliance on outside organizations to bring the plan to life and meet the goals. Rather with the Strategic Plan, the tourism team focused on things in the City's control, at least in these first 18 months – 2 years. There is overlap in the strategies in each plan in that many listed in the Sustainable Tourism Plan carry over into the Strategic Plan including strategies that focus on:

- Waste prevention and diversion
- Initiatives that lessen impacts to lands
- Multi-modal solutions to facilitate visitor traffic flows
- Monitoring and adjusting tourism marketing to achieve balance between quality of life and a healthy economy

Additionally, one of the Strategic Plan's action steps under the initiative to increase the capacity for developing, managing and promoting tourism is to assess in 18 months if a rewrite of the Sustainable Tourism Plan is needed going forward. The alternative would be to create another Strategic Plan and memorialize the Sustainable Tourism Plan.

Staff is looking for feedback from City Council on the draft plan, which will be incorporated into a final version that staff would like to implement as soon as possible. Additional feedback from City Council on any other tourism initiatives is also welcomed by staff.

Climate Action Plan/Sustainability Consistent: Yes - No - Not Applicable

Board/Commission Recommendation: Applicable - Not Applicable

The Tourism Advisory Board's feedback is included in the draft Strategic Plan.

Alternative(s): None

MOTION

I move to: For discussion and possible direction only.

City of Sedona Visitor Study

May 2024



Prepared by:

Kimley-Horn and Associates, Inc.
805 Pennsylvania Avenue, Suite 150
Kansas City, MO 64105

Executive Summary

Purpose

The City of Sedona is seeking to better understand the annual variation of worker, resident, and visitor travel patterns throughout the City limits, short-term versus long-term tourists, and how these visitor patterns may be changing over time or across seasons. The City contracted with a traffic and engineering consultant (Kimley-Horn) to collaborate with multiple “big data” data vendors (StreetLight Data and Replica) to conduct analyses relating to visitor estimates and lengths of visitor stays.

In addition to understanding the varying patterns of those traveling through Sedona, another goal of this study is to provide a methodology to estimate future visitors for the coming years and months. A detailed methodology to continue to estimate the total number of visitors per year and by month is provided at the end of this document as an Appendix to aid in this process moving forward.

“Visitor” Definition

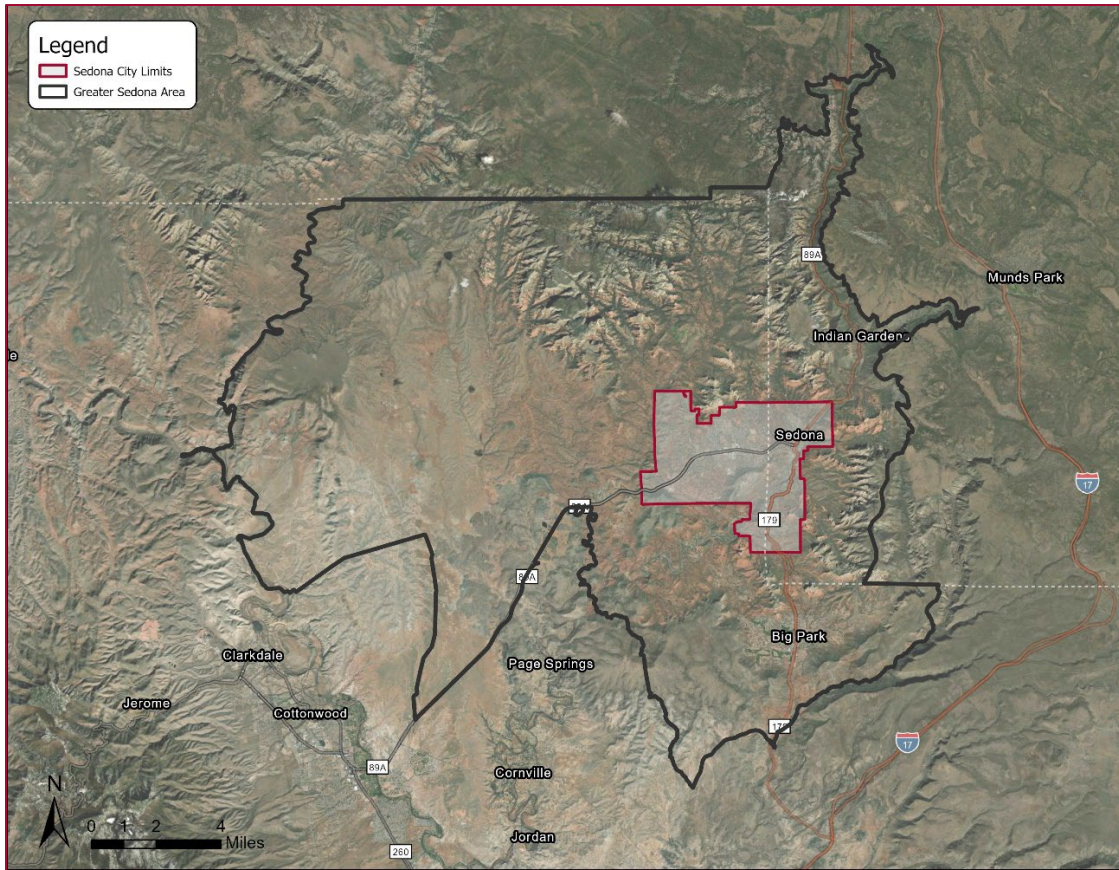
For the purposes of this study, a “visitor” is defined as any person who (1) neither resides nor works *within the greater Sedona region* (black outline shown in the map on the following page) and (2) makes at least one trip that starts, ends, or passes through the City limits (red outline in the map). A single visitor can thus make multiple trips in the City in any given day, and a single visitor can stay in the City for multiple nights. A visitor can also make several unique trips to the City throughout the year. Visitors can include tourist or recreational travelers, as well as those from nearby communities who do not live or work in Sedona but still come to Sedona for trips such as visiting friends or family, going to the movies, shopping, recreation, or other more frequently-occurring “non-home/work” trips.

Total Visitors per Year / Season

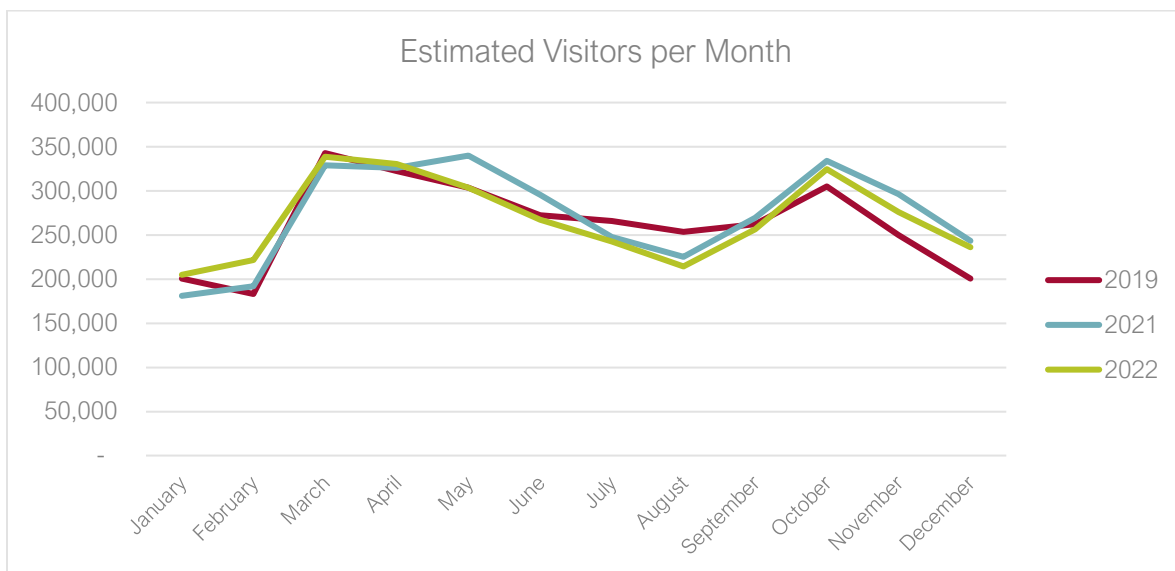
The table below shows the estimated number of total visitors to the City of Sedona for 2019, 2021, and 2022. This is accompanied by a figure on the following page showing the estimated number of visitors per month for this same period. Note that 2020 has been excluded from the dataset due to limitations in data availability during the early stages of the pandemic. Also note that while the total annual visitor estimates do not increase substantially from 2019 to 2021 (4% increase), there are several individual months with much more significant differences. For example, it is estimated that May 2021 saw 36,000 more visitors than May 2019 (12% increase) and November 2021 saw 46,000 more visitors than November 2019 (19% increase); whereas January 2021 saw 19,000 fewer visitors than January 2019 (10% decrease) due to the pandemic.

	2019	2021	2022
Estimate	3.16 million	3.28 million	3.22 million
Range	2.5 – 3.5 million	2.5 – 3.7 million	2.5 – 3.6 million

As a secondary check on visitor estimates, lodging demand estimates from Smith Travel Research showed a 1.5% increase in hotel lodging demand between 2019 and 2021, and continuous traffic counts from ADOT along SR 179 and SR 89A showed a 0.7% increase in average daily traffic volume.



Sedona Visitor Definition Boundaries: Must Live and Work Outside “Greater Sedona Area”

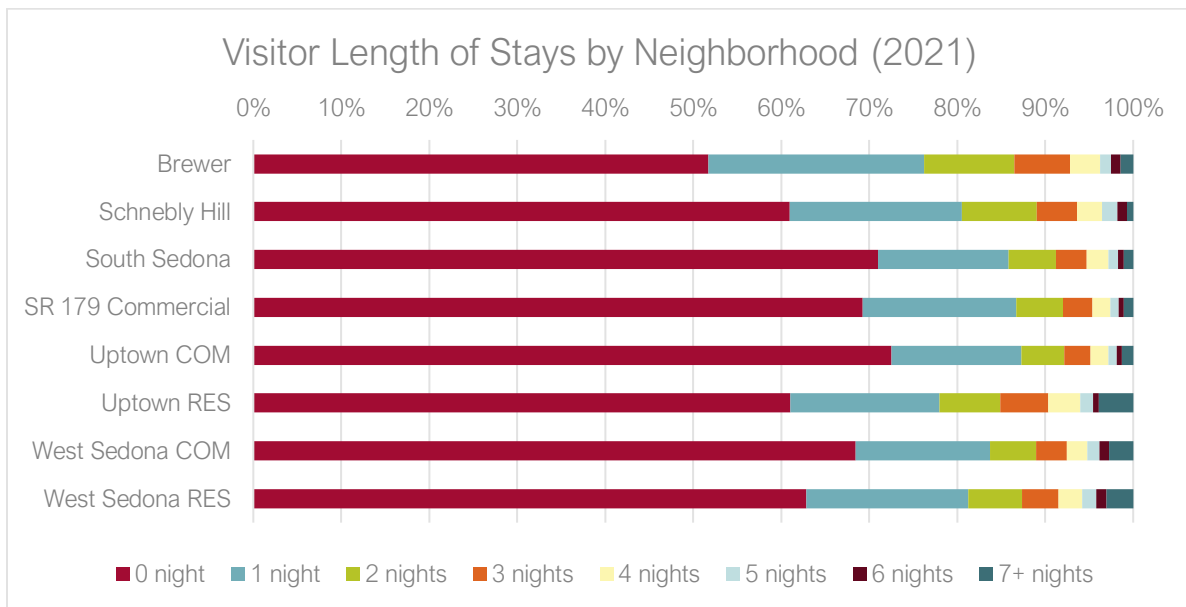
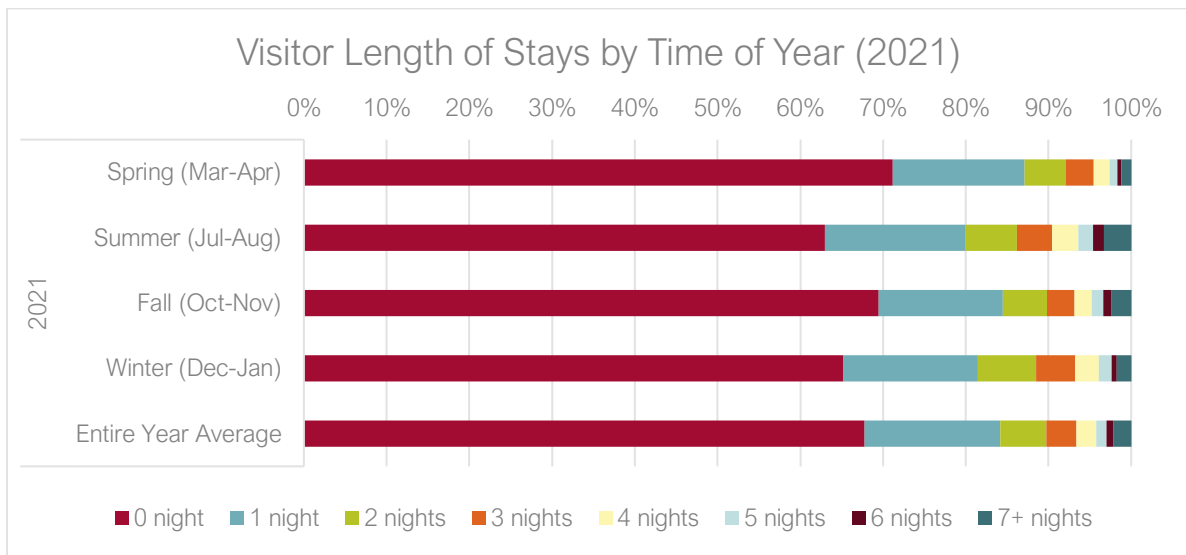


Visitor Length of Stays

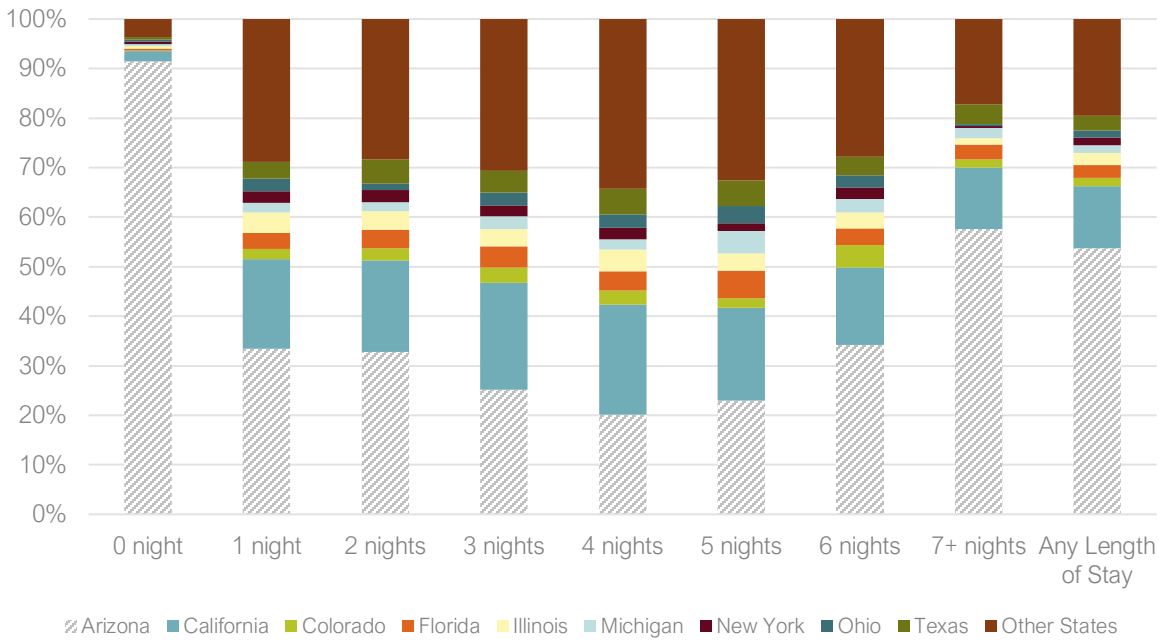
The figures on the upcoming pages highlight the following:

- Variation in length of visitor stays by season/time of year (a separate breakdown for 2019 and 2021 is provided in the full report).
- Variation in length of visitor stays by “neighborhood” within the City (an accompanying map is provided in the full report).
- Length of visitor stays by home geography, at both the state level and county level.

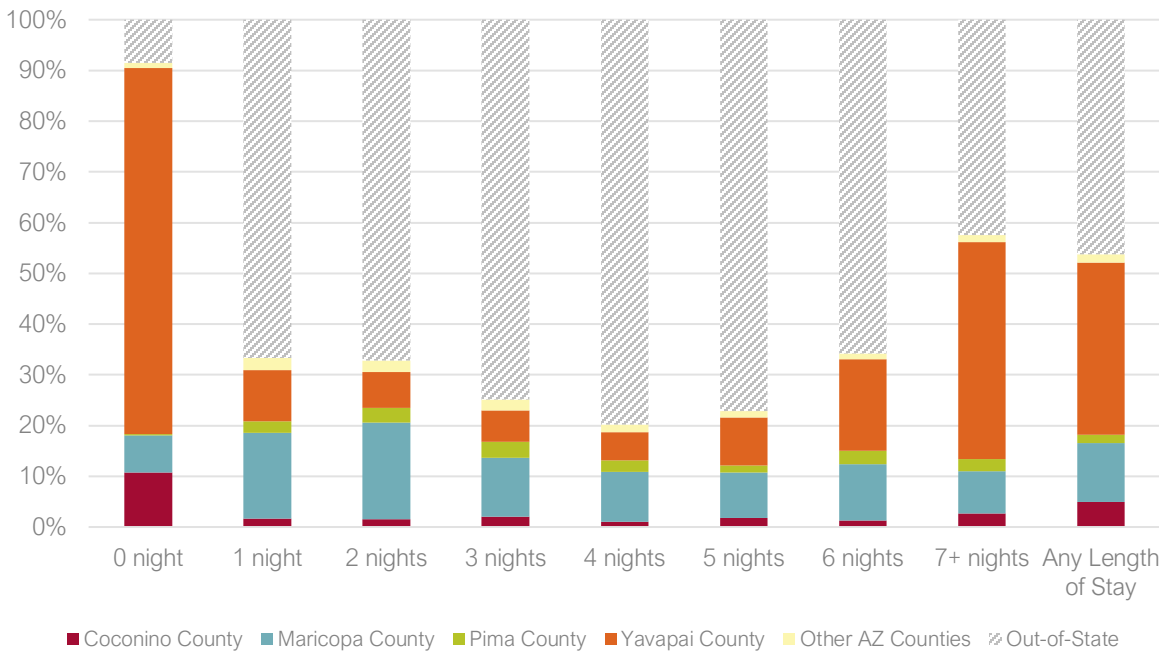
Additional supplemental graphics and detail are provided in the full report.



Visitor Length of Stay by Home Location (State Level, 2021)



Visitor Length of Stay by Home Location (County Level, 2021)



1 Introduction and Background

The City of Sedona is seeking to understand travel patterns associated with tourism and short-term visitors, as well as residents and workers, and how these patterns may be changing over time or across seasons. The City and greater Verde Valley region have anecdotally seen an increase in visitors in recent years, notably following the COVID-19 pandemic in 2020. This increase has been observed with challenges such as exacerbating traffic congestion and overcrowding of parking lots. While the City has been addressing many of its transportation and land use challenges with the implementation of the Sedona in Motion (SIM) Plan, the City desires to firmly quantify the amount of visitors to the region and develop a process to track visitation over time and across seasons. Specifically, the City is seeking to understand:

- Number of visitors per year and season (i.e., fall vs. spring)
- Length of visitor stays (day trip versus overnight versus multiple nights), and if this varies by time of year
- Demographics of visitors by length of stay, and if this varies by length of stay
- Home locations of visitors, and if this varies by length of stay
- Number of commuter workers and residents in City by time of year (i.e., fall vs. spring)
- Home locations of workers, and work locations of residents
- Estimated number of person trips being made by mode (e.g., auto, walk, bike) and how these relative levels of activity vary across the year.

The City is seeking to utilize state-of-the-practice “big data” sources capturing anonymized mobile devices, connected vehicles, or other methods to support this analysis. The City contracted with a traffic and engineering consultant (Kimley-Horn) to collaborate with multiple data vendors and lead this analysis. This report summarizes the methodology and findings associated with this analysis and provides a process to revisit this analysis in the future.

2 Methodology

2.1 DATA SOURCES

Kimley-Horn collaborated with two specific “big data” vendors – StreetLight Data and Replica – to obtain metrics relating to visitor travel and length of visitor stays derived from anonymized mobile devices or connected vehicles. Both vendors provide online platforms for running custom analyses and querying data. The vendor data was supplemented with a variety of City-provided data sources providing detailed daily or monthly information that could be synthesized with or utilized as a back-check on the “big data” products.

2.1.1 “Big Data” Sources

Table 1 summarizes the available information that was utilized from each of the two vendors. These are described further in the following section.

Table 1. Big Data Sources Utilized for Study

Big Data Source	Available Information
Replica	<ul style="list-style-type: none"> • Average daily (Thursday/Saturday) person trips; filterable to visitors/residents/workers • Outputs by season (e.g., Fall [Sep-Nov] 2022) • Demographic/geographic breakdown of visitor trips • Modal breakdown (auto, bike, pedestrian) of trips
StreetLight Data	<ul style="list-style-type: none"> • Distribution of length of visitor stays* • Associated demographics and geographic breakdown by length of stay* • Distribution of visitor trips by day of week

*Obtained via custom project purchase (not available directly within platform)

StreetLight Data

StreetLight Data is a provider of mobility metrics derived by sampling anonymized mobile devices such as cell phones or connected vehicles. StreetLight’s online platform provides metrics associated with trips starting, ending, or passing through a user-defined area. Furthermore, by tracking the locations in which devices spend extended periods of time throughout the day, StreetLight infers a device’s “home” and “work” location and can use this information to classify trips to a given area as to whether they are made by “visitors” (i.e., a device that neither “lives” nor “works” in the area).

Through the StreetLight online platform, Kimley-Horn obtained estimated visitor-classified trips starting, ending, or passing through the City for each day of the week. These estimates were obtained separately for 2019 and 2021 and were used to develop adjustment factors to the Replica weekday trip estimates described in the next section. StreetLight’s online platform is also being used to support other ongoing planning initiatives in the City, including the Uptown parking study.

StreetLight’s standard methodology defines a “trip” as complete when a mobile device stops moving for at least five minutes, such as when a person is at their home or at work. Within a standard project in StreetLight’s online platform, no information is available to relate individual trips to one another (i.e., a mobile device for a person who goes from work to the grocery store and then from the grocery store to home would be classified as two separate trips). Thus, in order to “chain” visitor trips together and track the length of time that a mobile device stays in the Sedona region, a “custom project” with StreetLight Data was needed. Kimley-Horn collaborated with StreetLight Data on this custom project specifically to obtain information related to length of visitor stays, in addition to the “standard” project through StreetLight’s online platform described above.

The StreetLight custom project specifically used Location-Based Services (LBS) data, in which anonymized mobile device IDs can be tracked over time. StreetLight’s solutions engineers team created an analysis to track mobile devices that made at least one stop in the Sedona region across all of 2019 and 2021 and then quantify the amount of time those mobile devices stayed in the region.

This custom-analysis methodology has been used previously on projects around the US, most notably by Baird et al on a 2022 study of visitor travel to National Park units in Colorado¹. StreetLight then provided aggregated outputs to Kimley-Horn in terms of the number of unique devices sampled, limited specifically to devices that were classified as “visitors” to the region. In total, the custom project with StreetLight Data sampled nearly 367,000 unique mobile devices (visitors) across more than 2.6 million trips.

A known limitation of using StreetLight Data *moving forward* is that its underlying methodology was updated in May 2022 to utilize predominantly Connected Vehicle Data (CVD), whereas previously its methodology predominantly utilized LBS data. This update was due to the diminishing sample size of LBS data in recent months based on various privacy-related court rulings and updates to mobile device operating systems (e.g., iOS, Android). CVD data does not allow for a device to be “tracked” once a vehicle trip is complete (i.e., the device ID gets re-anonymized), whereas LBS data allows for continuously tracking an anonymized device across days or months. Given this update, some metrics obtained using StreetLight Data for this study cannot be obtained for months later than April 2022, and Kimley-Horn specifically recommended pulling metrics for the years of 2019 and 2021 for this study. These include metrics related to length of stay and home locations of visitors/workers and work locations of residents.

Replica

Replica is another provider of mobility metrics with an online platform. Similar to StreetLight, Replica obtains sampled mobile device and connected vehicle data. Replica synthesizes this data with other information, such as commercial transaction data and real estate data, into a model that provides an estimated “replica” of travel patterns on an *average* day. Specifically, Replica’s “Places” module is a highly detailed, granular representation of a “synthetic population” modeled across the entire US. While Replica does not provide the ability to analyze specific dates or days of the week, it is able to provide a highly detailed trip table for any user-defined geography for “average days”. These trip tables are available for an average weekday (Thursday) and average weekend day (Saturday) on a “seasonal” basis (i.e., Fall 2021 would represent an average for September – November 2021). An example trip table is shown in **Figure 1**.

Kimley-Horn queried Replica for all trips starting, ending, or passing through the City on an average weekday and weekend day in Fall 2019, Fall 2021 and Fall 2022 (note: Fall 2020 is not available within the platform due to disruptions in travel associated with the pandemic). Using the detailed information available within those trip tables, trips could then be classified as visitor or non-visitor trips based on the trip taker’s home and work locations. Using the unique trip taker IDs, the estimated number of visitors and total trips made by visitors could then be tabulated for an average weekday or weekend for each season. These seasonal estimates could then be synthesized with information from other data sources, including StreetLight Data.

¹ <https://journals.sagepub.com/doi/10.1177/03611981221083911>

Study | Sedona AZ

Filters | Southwest, Fall 2021, Sat | Trip Origin: 8

Map | Dataset

54.8k trips by 22.1k trip takers • High certainty

Trips | People

The trip table represents the traveling population for your selected geo. The rows below are a preview of the data that meets the applied set of filters including origin, destination, mode, and distance. [Learn More](#)

[Manage Attributes](#) [Download](#)

Showing first 100 of all 54,814 rows

Activity ID	Trip Origin Block Group	Trip Origin Tract	Trip Origin County	Trip Origin State	Trip Origin Sedona Regions	Trip Destination Block Group	Trip Destination Tract	Trip Destination County	Trip Destination State	Trip Destination Sedona Regions	P	M
18218953596715159207	1 (Tract 16, Coconino, AZ)	16 (Coconino, AZ)	Coconino County, AZ	Arizona	South Sedona	1 (Tract 16, Coconino, AZ)	16 (Coconino, AZ)	Coconino County, AZ	Arizona	South Sedona	pi	
12680543857203201667	1 (Tract 16, Coconino, AZ)	16 (Coconino, AZ)	Coconino County, AZ	Arizona	South Sedona	2 (Tract 18.02, Yavapai, AZ)	18.02 (Yavapai, AZ)	Yavapai County, AZ	Arizona	West Sedona RES	ai	
1866930834489958580	1 (Tract 18.01, Yavapai, AZ)	18.01 (Yavapai, AZ)	Yavapai County, AZ	Arizona	West Sedona COM	2 (Tract 18.02, Yavapai, AZ)	18.02 (Yavapai, AZ)	Yavapai County, AZ	Arizona	West Sedona RES	ai	
11333105836216489524	1 (Tract 18.01, Yavapai, AZ)	18.01 (Yavapai, AZ)	Yavapai County, AZ	Arizona	West Sedona RES	2 (Tract 16, Coconino, AZ)	16 (Coconino, AZ)	Coconino County, AZ	Arizona	Uptown COM	pi	
11783288090592253919	1 (Tract 18.01, Yavapai, AZ)	18.01 (Yavapai, AZ)	Yavapai County, AZ	Arizona	West Sedona COM	2 (Tract 18.01, Yavapai, AZ)	18.01 (Yavapai, AZ)	Yavapai County, AZ	Arizona	West Sedona RES	pi	
12904083930711842410	1 (Tract 18.01, Yavapai, AZ)	18.01 (Yavapai, AZ)	Yavapai County, AZ	Arizona	West Sedona RES	1 (Tract 17.01, Yavapai, AZ)	17.01 (Yavapai, AZ)	Yavapai County, AZ	Arizona	None	ai	
2068009826798087917	1 (Tract 18.01, Yavapai, AZ)	18.01 (Yavapai, AZ)	Yavapai County, AZ	Arizona	West Sedona RES	2 (Tract 18.01, Yavapai, AZ)	18.01 (Yavapai, AZ)	Yavapai County, AZ	Arizona	West Sedona RES	ai	
3947528708820015821	1 (Tract 18.01, Yavapai, AZ)	18.01 (Yavapai, AZ)	Yavapai County, AZ	Arizona	West Sedona RES	2 (Tract 18.02, Yavapai, AZ)	18.02 (Yavapai, AZ)	Yavapai County, AZ	Arizona	West Sedona RES	ai	
12443830277100302539	1 (Tract 18.01, Yavapai, AZ)	18.01 (Yavapai, AZ)	Yavapai County, AZ	Arizona	West Sedona COM	2 (Tract 18.01, Yavapai, AZ)	18.01 (Yavapai, AZ)	Yavapai County, AZ	Arizona	West Sedona RES	pi	
16184914633516844228	1 (Tract 18.01, Yavapai, AZ)	18.01 (Yavapai, AZ)	Yavapai County, AZ	Arizona	West Sedona COM	1 (Tract 16, Coconino, AZ)	16 (Coconino, AZ)	Coconino County, AZ	Arizona	South Sedona	cr	
1041216403368884811	1 (Tract 18.01, Yavapai, AZ)	18.01 (Yavapai, AZ)	Yavapai County, AZ	Arizona	West Sedona RES	2 (Tract 18.01, Yavapai, AZ)	18.01 (Yavapai, AZ)	Yavapai County, AZ	Arizona	West Sedona COM	pi	
10942676525624902409	1 (Tract 18.01, Yavapai, AZ)	18.01 (Yavapai, AZ)	Yavapai County, AZ	Arizona	West Sedona COM	3 (Tract 17.02, Yavapai, AZ)	17.02 (Yavapai, AZ)	Yavapai County, AZ	Arizona	Village of Oak Creek	pi	
468250808989366177	1 (Tract 18.02, Yavapai, AZ)	18.02 (Yavapai, AZ)	Yavapai County, AZ	Arizona	West Sedona COM	2 (Tract 18.01, Yavapai, AZ)	18.01 (Yavapai, AZ)	Yavapai County, AZ	Arizona	West Sedona COM	pi	
8570602890882948084	1 (Tract 18.02, Yavapai, AZ)	18.02 (Yavapai, AZ)	Yavapai County, AZ	Arizona	West Sedona COM	2 (Tract 506.04, Maricopa, AZ)	506.04 (Maricopa, AZ)	Maricopa County, AZ	Arizona	None	pi	
3130803191623944889	1 (Tract 18.02, Yavapai, AZ)	18.02 (Yavapai, AZ)	Yavapai County, AZ	Arizona	West Sedona COM	1 (Tract 20.03, Yavapai, AZ)	20.03 (Yavapai, AZ)	Yavapai County, AZ	Arizona	None	pi	
12754358170864707262	1 (Tract 18.02, Yavapai, AZ)	18.02 (Yavapai, AZ)	Yavapai County, AZ	Arizona	West Sedona COM	2 (Tract 18.01, Yavapai, AZ)	18.01 (Yavapai, AZ)	Yavapai County, AZ	Arizona	West Sedona COM	pi	

Figure 1. Example trip table from Replica Places module.

2.1.2 Reported / Field Data Sources

In addition to the data obtained from StreetLight Data and Replica, Kimley-Horn also reviewed a number of data sources available to the City for their applicability in developing visitor projections, adjusting month-to-month estimates, or providing a back-check on big data vendor estimates.

Traffic Counts

Daily traffic counts from Arizona Department of Transportation (ADOT)² from continuous count stations are available for both State Route 179 (SR 179) south of the City limits and State Route 89A (SR 89A) west of SR 179. As these two facilities represent two of the three roadways into and out of the City, they provide a strong proxy for the total travel into and out of the City. Kimley-Horn queried for daily traffic counts along both facilities for all individual days from 2019 to present, and these traffic counts were used to produce monthly and annual average daily traffic (AADT) volumes. Note that this count data needed to be cleaned to ignore dates in which counts were missing along one or both directions of a facility, likely due to issues with the count sensor. **Figure 2** shows the average total daily traffic volume across SR 179 and SR 89A combined for each month from 2019 to present; strong seasonal variation can be seen, with the highest traffic volumes in spring and fall each year.

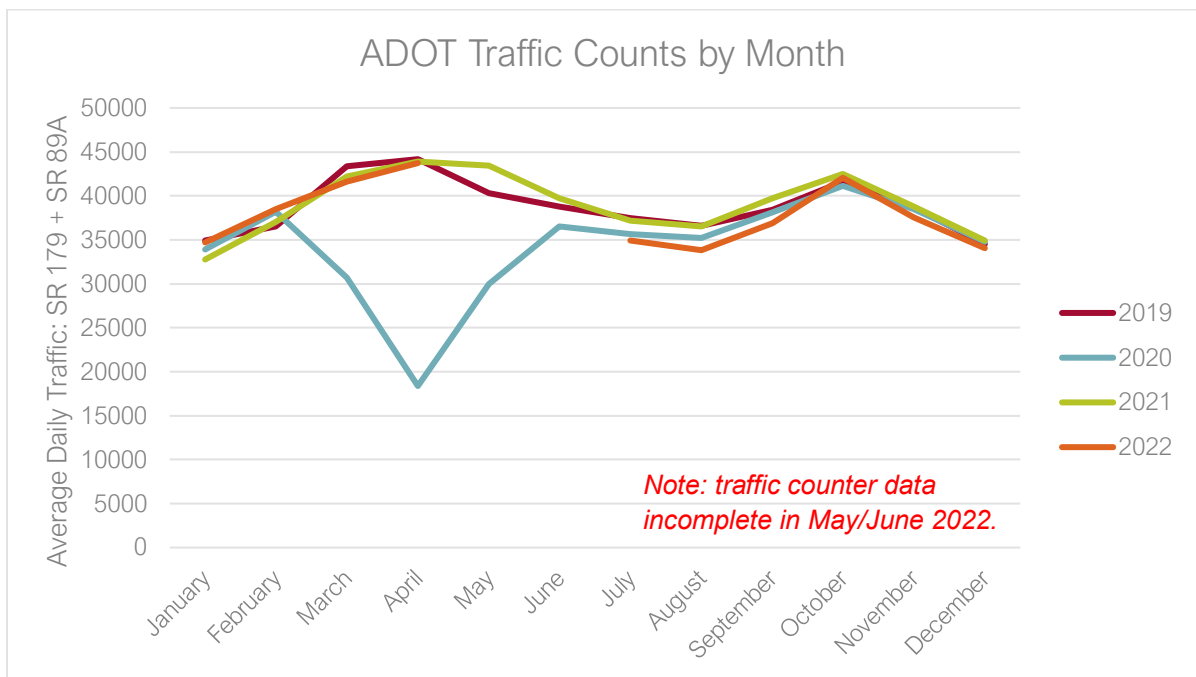


Figure 2. Monthly average daily traffic volumes (SR 179 + SR 89A combined) from ADOT continuous count stations.

² <https://adot.public.ms2soft.com/tcds/tsearch.asp?loc=adot>

City Sales and Bed Tax Revenue

City staff provided monthly tax revenue estimates going back to 2013, including sales tax (retail, restaurant and bar, hotel/motel, construction, leasing, communication and utilities, amusements, and other) and bed tax revenues. **Figure 3** shows the total monthly sales and bed tax revenues from 2019 to present. Similar to the ADOT count data, there is strong seasonal variation, with the highest revenues occurring in spring and fall each year. Total revenues are higher in recent years due to inflation.

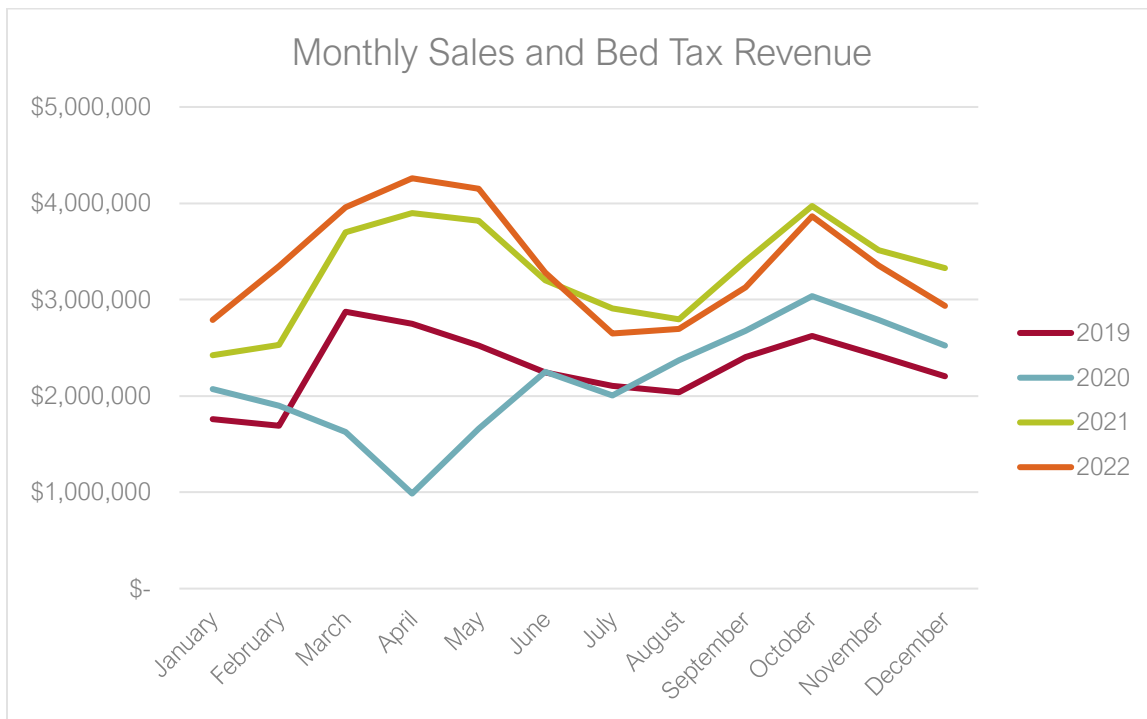


Figure 3. Monthly City sales and bed tax revenue.

Smith Travel Research (STR) Lodging Demand

City staff provided monthly lodging demand data from Smith Travel Research, showing a sample of rooms available and requested each month. Again, a strong seasonal variation is shown in the data, as seen in **Figure 4**. A strong correlation with monthly average traffic volumes is observed in **Figure 5**, as many of the monthly datasets available to the City reflected that strong seasonal variation.

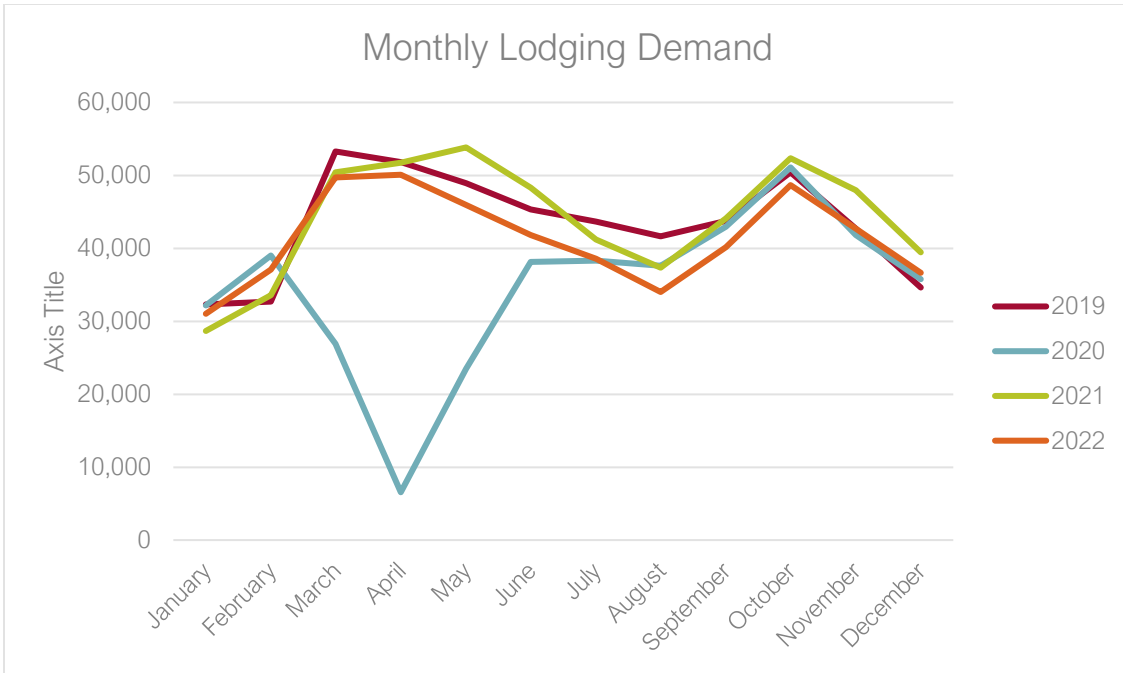


Figure 4. Monthly total lodging demand in City (Source: Smith Travel Research)

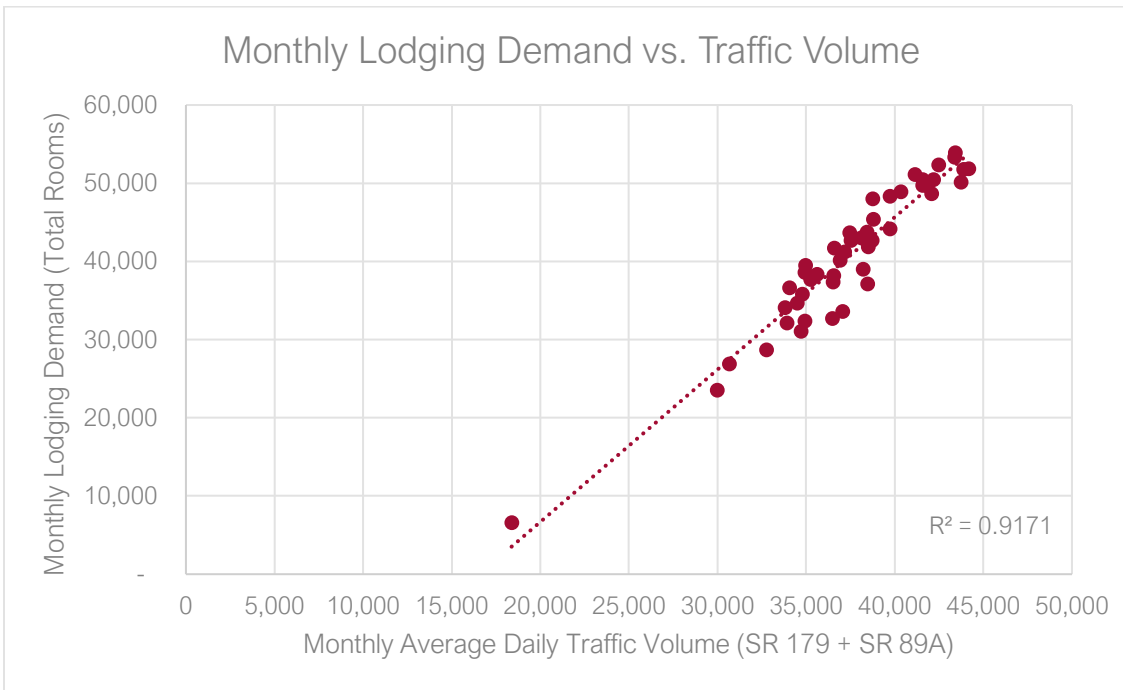


Figure 5. Monthly total lodging demand versus average daily traffic volumes (SR 179 + SR 89A combined)

City Wastewater Flow

City staff also provided daily influent wastewater flow data, which can also be interpreted as a proxy for the number of people in town at any given time. **Figure 6** shows the average daily flow for each month from 2019 to present, which again shows a strong seasonal trend. As this data is available for individual days, it can also be used to understand differences for specific days, such as weekends, holidays, and spring break.

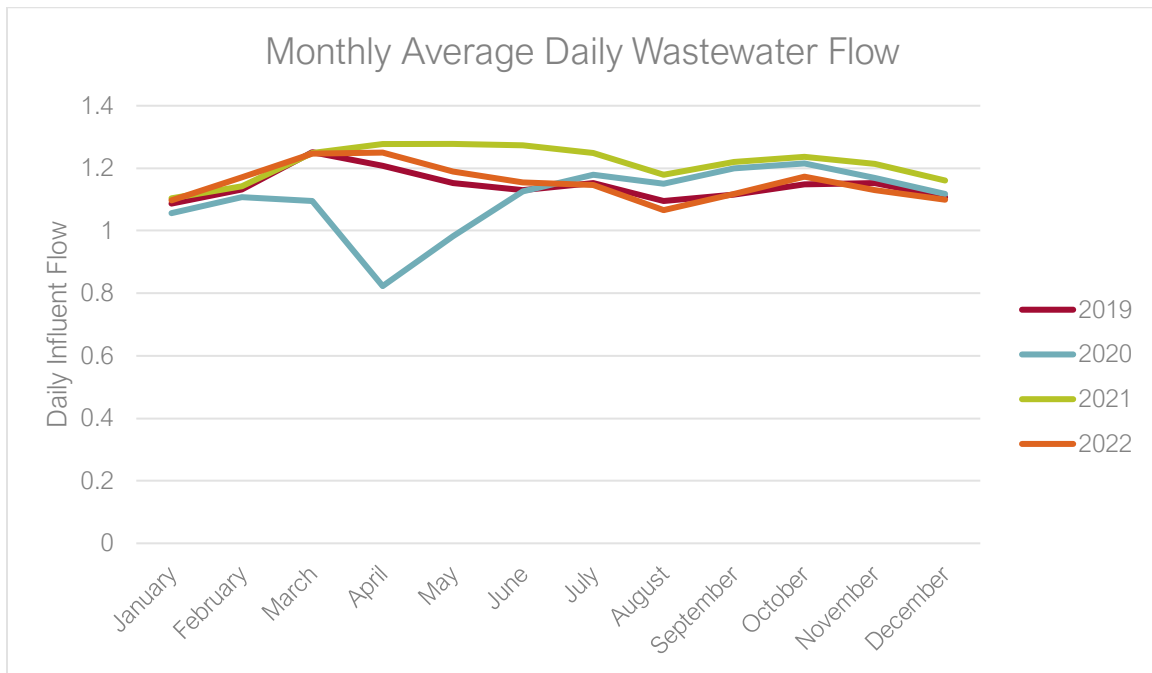


Figure 6. Monthly average daily wastewater flow

Other Data Sources Examined

In addition to the datasets described above, which demonstrate a strong seasonal variation in travel to and within the City, Kimley-Horn reviewed the following datasets:

- Public parking data: average peak utilization of public parking for surveyed dates in March and June 2023
- Sedona Shuttle ridership: monthly total ridership; note that month-to-month or year-over-year comparisons are challenging due to continued changes and additions to shuttle service

Finally, while not yet available for external review, City staff noted that short-term rental (e.g., Airbnb) data from Key Data is another potential data source that would be available in the future as a potential source of information on visitor travel.

2.2 VISITOR ESTIMATION

Using the data sources described in the previous section, Kimley-Horn developed estimates for the total number of annual visitors, monthly visitor estimates, and length of visitor stays.

2.2.1 Defining “Visitors”

For the purposes of this study, a “visitor” is defined as any person who (1) neither resides nor works *within the greater Sedona region* (black outline shown in the map in **Figure 7**) and (2) makes at least one trip that starts, ends, or passes through the City limits (red outline in the map). A single visitor can thus make multiple trips in the City in any given day, and a single visitor can stay in the City for multiple nights. A visitor can also make several unique trips to the City throughout the year. Visitors can include tourist or recreational travelers, as well as those from nearby communities who do not live or work in Sedona but still come to Sedona for trips such as visiting friends or family, going to the movies, shopping, or other more frequently-occurring “non-home/work” trips.

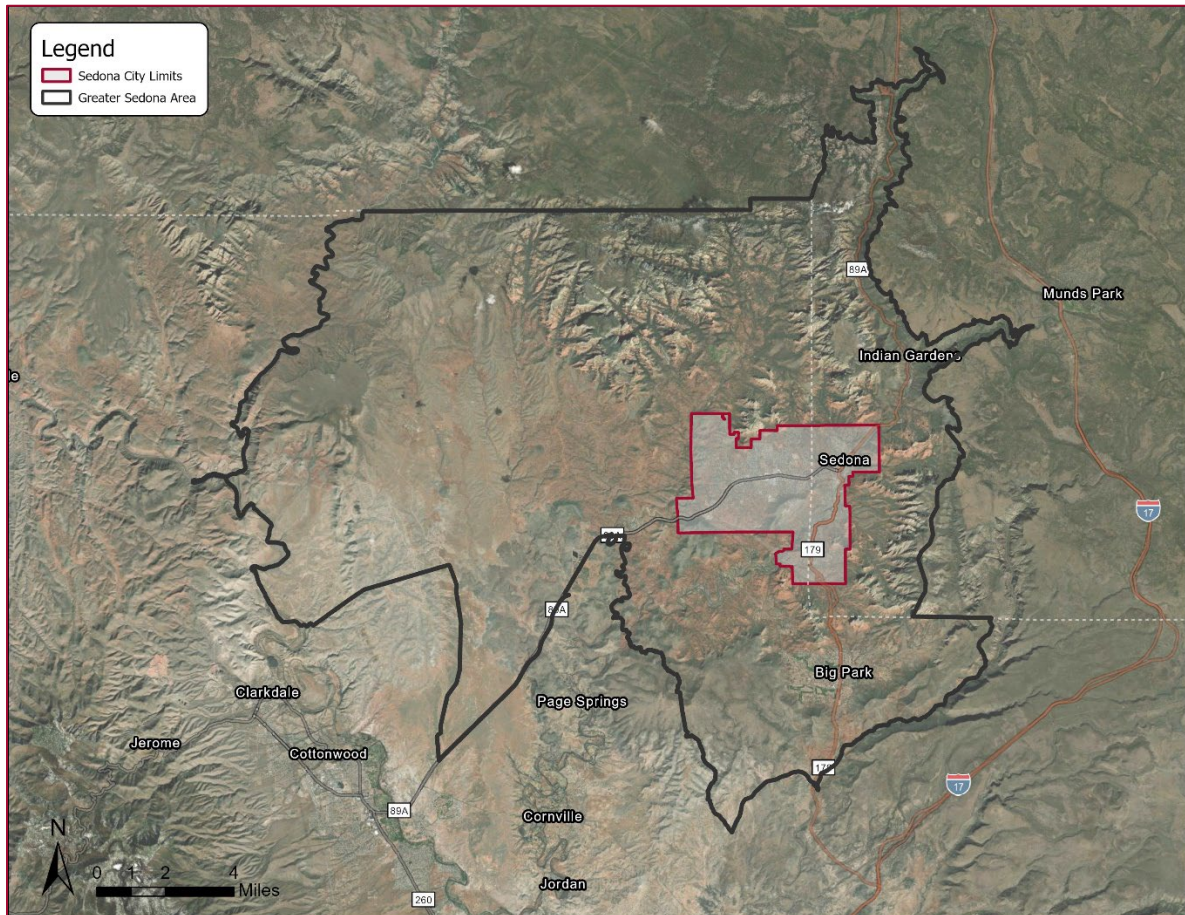


Figure 7. Visitor Definition Areas

2.2.2 Visitor Estimation Approach

Figure 8 summarizes the visitor estimation methodology. Further details and adjustment factors are provided in the **Appendix: Future Visitor Tracking Methodology**.

1. Use Replica's Places module to obtain the estimated average daily number of visitors for a fall weekday/weekend day. This requires applying a geographic definition on what constitutes a visitor (i.e., trip taker neither lives nor works within the boundary of the greater Sedona region) and what constitutes a *visitor trip* (i.e., must start or end within the City limits, or can also include pass-through trips that do not physically stop in the City for an extended period of time). This provides the total visitors for an average Thursday or average Saturday for a specific season (e.g., Fall 2021).
2. Adjust average Thursday/Saturday estimates from Replica to "average day". Using the breakdown of visitor trips by day of week from StreetLight, the average Thursday/Saturday visitors can be converted to "average day" (any day of the week).
3. Apply adjustment factors to the daily visitor estimates to obtain monthly and annual totals. The "average day" estimate is first multiplied by the number of days in each month. Using monthly adjustment factors (recommended to be using the City lodging demand), the ratio for each month against that year's Fall (September through November) average can be applied to estimate each month's total. For each month, and overnight trip scaling factor must also be applied to account for visitors who spend multiple nights. This results in an estimated total number of visitors for an entire year (e.g., all of 2021).

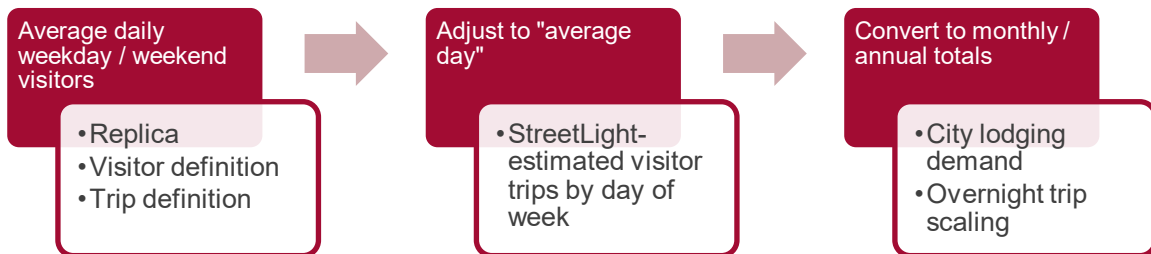


Figure 8. Annual visitor estimation methodology summary.

3 Findings

This section summarizes the study findings from the data sources and methodology described in the previous section. It first presents the development of the total visitor estimates, followed by findings on the length of visitor stays. This section also provides additional findings from relating to mode split within Sedona, home locations of Sedona workers, and work locations of Sedona residents.

3.1 TOTAL VISITOR ESTIMATES

Table 2 shows the total estimated annual visitors to the City of Sedona for 2019, 2021, and 2022, along with an estimated range for each year, using the visitor estimation methodology described in Section 2.2.

- Note that the proposed methodology relies on Replica’s seasonal “Places” module estimates, which are only available for those three years and excludes 2020. These estimates were derived using Replica’s Fall season for each year for consistency; it is anticipated that a Fall 2023 season will be available in early- to mid-2024.
- Comparisons are shown to estimates provided by Tourism Economics, a provider of travel trends and forecasts who also recently developed visitor estimates for the City of Sedona. As shown, the Kimley-Horn annual estimates are fairly consistent with the Tourism Economics estimates.

Table 2. Annual Total Visitor Estimates.

	2019	2021	2022
Estimate	3.16 million	3.28 million	3.22 million
Range	2.5 – 3.5 million	2.5 – 3.7 million	2.5 – 3.6 million
<i>Tourism Economics Estimate</i>	<i>3.00 million</i>	<i>3.29 million</i>	<i>3.16 million</i>
% Difference	5.3%	-0.2%	1.9%

Figure 9 shows the estimated number of visitors per month for 2019, 2021, and 2022, with the seasonal uptick in spring and fall present. The estimated highest visitor month over this period is May 2021, with approximately 340,000 estimated visitors. Note that while the total annual visitor estimates do not increase substantially from 2019 to 2021 (4 percent increase), there are several individual months with much more significant differences. For example, it is estimated that May 2021 saw 36,000 more visitors than May 2019 (12% increase) and November 2021 saw 46,000 more visitors than November 2019 (19% increase); whereas January 2021 saw 19,000 fewer visitors than January 2019 (10% decrease) due to the pandemic.

As a secondary check on visitor estimates, lodging demand estimates from Smith Travel Research showed a 1.5% increase in hotel lodging demand between 2019 and 2021, and continuous traffic counts from ADOT along SR 179 and SR 89A showed a 0.7% increase in average daily traffic volume.

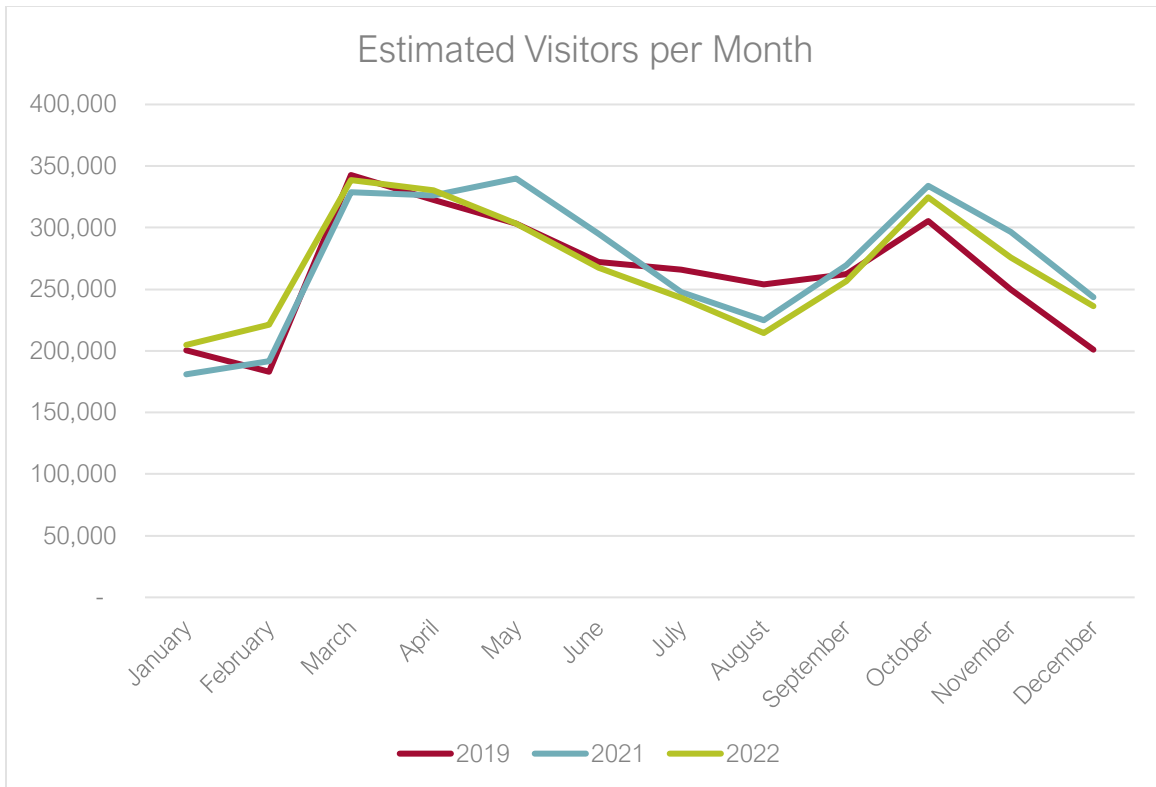


Figure 9. Estimated Visitors per Month.

3.2 LENGTH OF VISITOR STAYS

All of the findings presented in this section are estimated using the outputs of the StreetLight Data custom analysis in which individual device trips were “chained” together to analyze the movement of devices across several days or weeks.

3.2.1 Visitor Stays by Time of Year

Figure 10 shows the breakdown of visitor stay lengths, as estimated using StreetLight Data. Separate breakdowns are provided for specific seasons of the year, and 2019 is shown separately from 2021. In general, trends are fairly consistent across both 2019 and 2021.

- Over the course of the entire year, approximately two-thirds of visitors do not stay overnight. This trend upticks slightly from 2019 (66%) to 2021 (68%).
- Spring and fall tend to show slightly higher percentages of single-day visitors; in 2021, these percentages were 71% and 69%, respectively.
- The percentage of total visitors staying for one night and two nights does not fluctuate much by season or year. Essentially, during peak visitor seasons (spring and fall), the percentage of single-day visitors increases while the percentage of one or two-night visitors stays consistent. During peak seasons, the percentage of three-plus night visitors decreases.

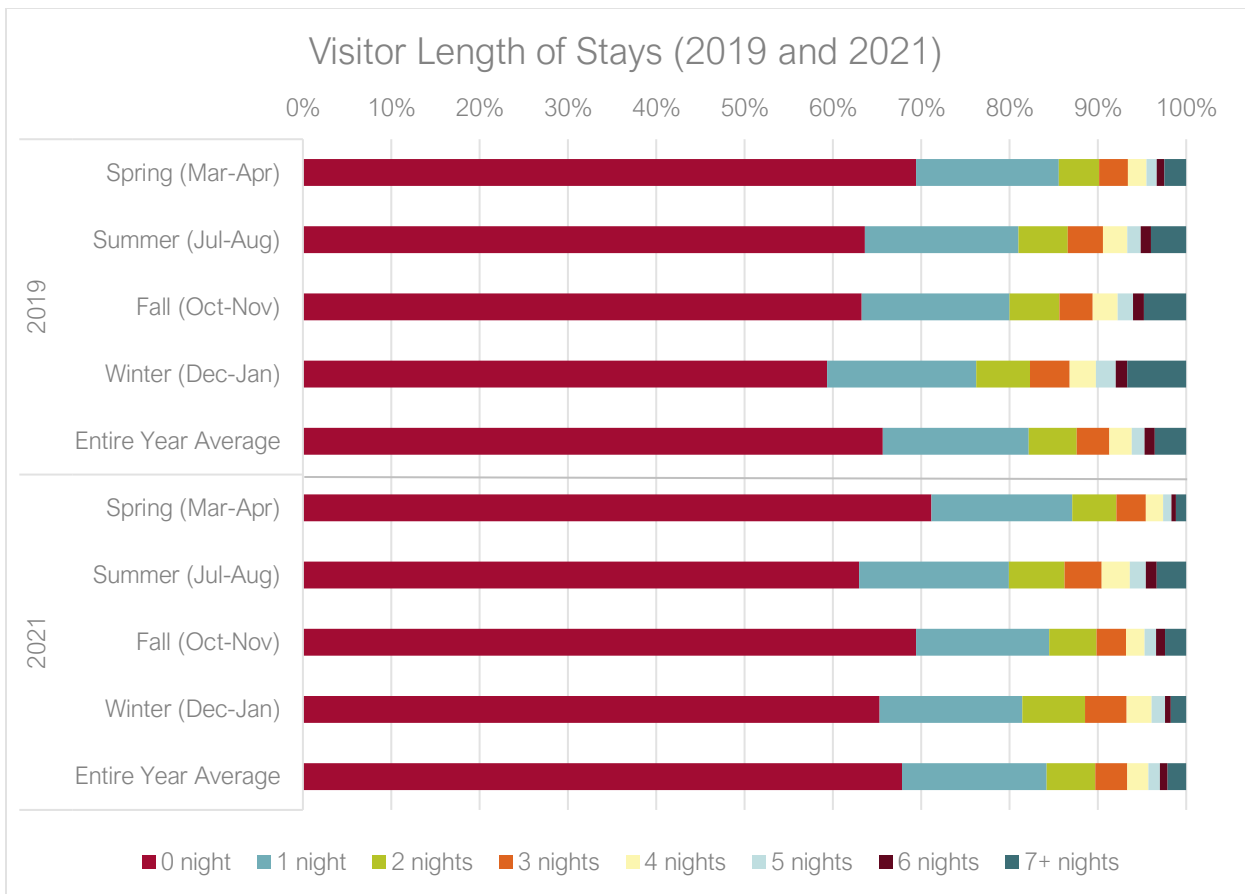


Figure 10. Visitor Length of Stays by Time of Year (Source: StreetLight Data)

3.2.2 Visitor Stays by Neighborhood within Sedona

Across the City, there exists some variation with regard to how long visitors are staying. Kimley-Horn worked with StreetLight Data to summarize length of visitor stays for various predefined “neighborhoods” as shown in **Figure 11**; **Figure 12** shows the output of this analysis, represented as averages across all of 2021.

- The areas seeing the highest percentage of single-day/non-overnight visitors are generally the more commercial areas: Uptown Commercial, SR 179 Commercial, West Sedona Commercial, and South Sedona.
- There are slight variations in length of stay between neighborhoods, but generally 60% to 70% of all visitor trips to Sedona do not spend the night.

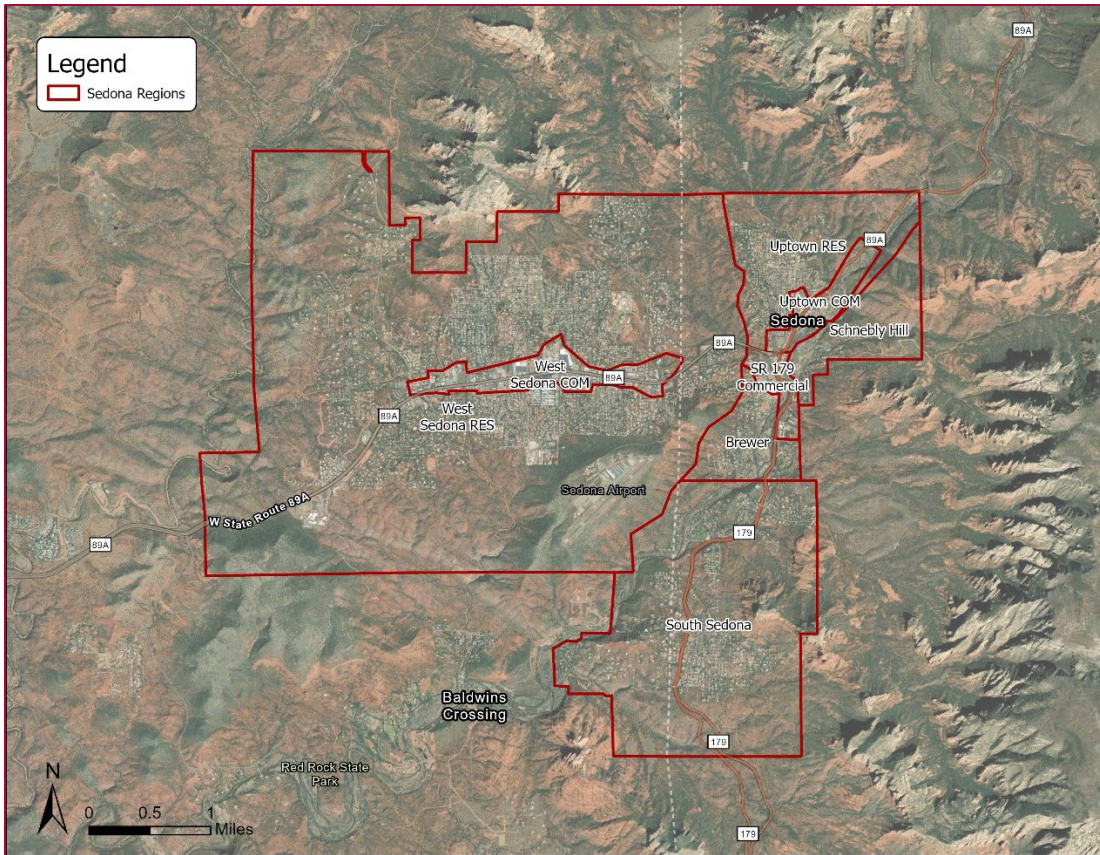


Figure 11. Sedona Neighborhood Boundaries Used.

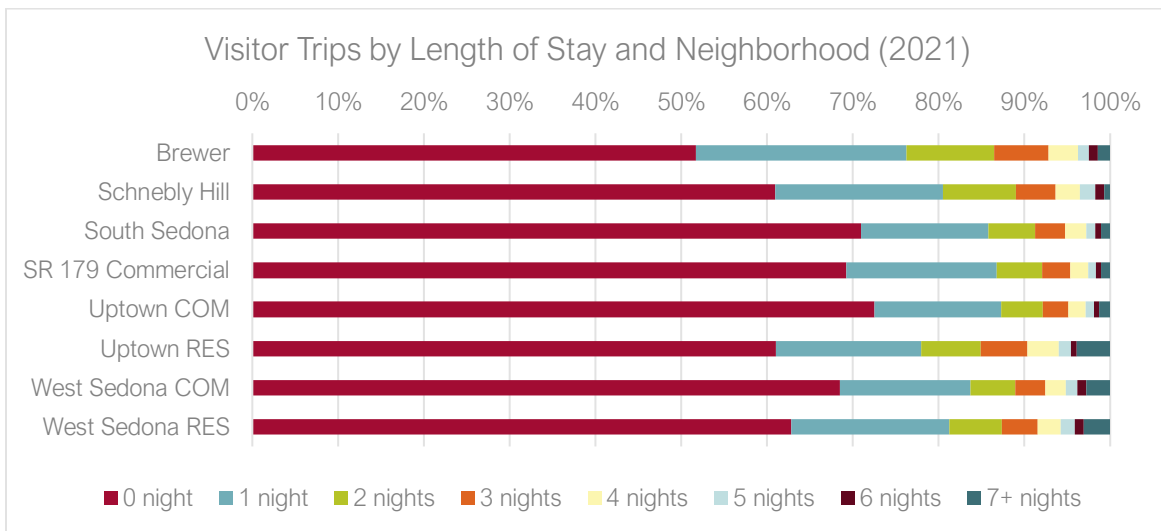


Figure 12. Visitor Length of Stays by Neighborhood (Source: StreetLight Data)

3.2.3 Demographics of Visitor Stays

The StreetLight Data custom analysis was also able to provide a breakdown of demographic information, including income and race, cross-tabulated against the lengths of visitor stays. **Figure 13** provides a breakdown of visitor stays by income levels, and **Figure 14** provides a breakdown by race.

- Across all visitors, the City draws a slightly higher percentage of people making less than \$50,000 annually (34%) as compared to the US average (31% of the population).
- There is a higher percentage of visitors in lower income brackets making single day trips, which can be expected. Alternatively, there are slightly higher percentages of visitors in higher-income brackets having multi-night stays (one to four nights). However, for stays longer than five nights, the percentage of visitors from the lower income levels starts to increase. This is possibly due to capturing longer-term stays with family and friends (trips that would still be classified as “visitors”) or travelers in recreational vehicles, which often include retired or senior citizens.
- Looking at a breakdown by race, the percentage of visitors to Sedona skews white (71%) as compared to the US average (62%). The most noticeable racial group that is represented at a significantly lower level than the national average is Black (4% of visitors, as compared to 12% of the US population).
- In general, the longer the length of stay, the higher the percentage of those identifying as white.

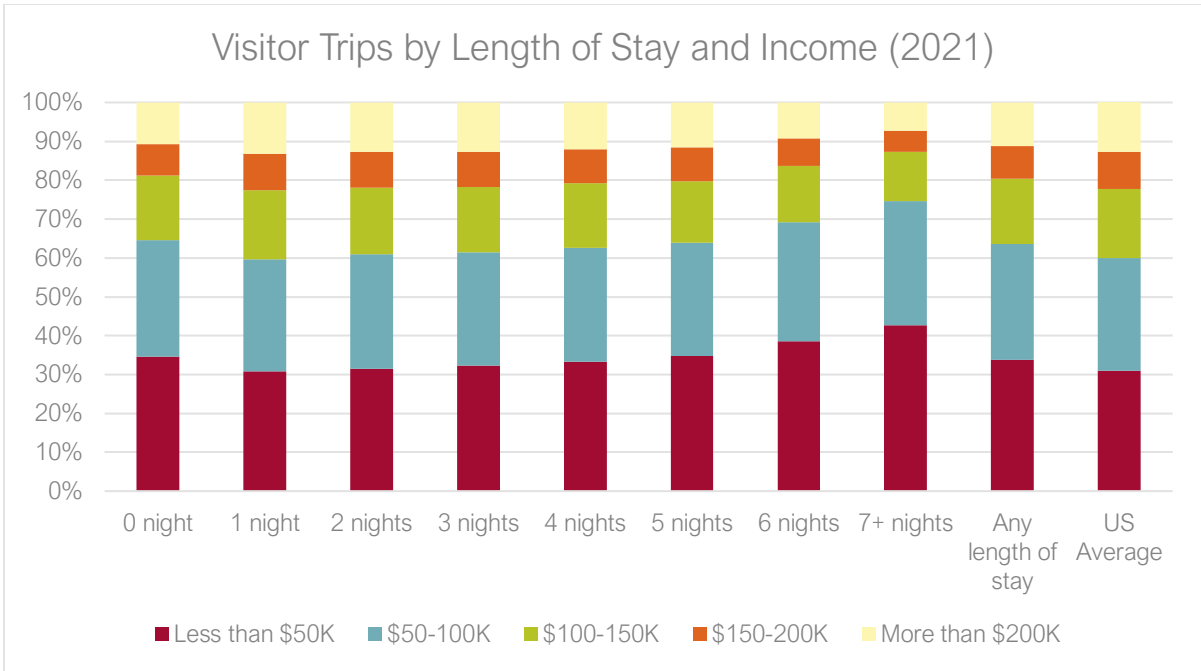


Figure 13. Visitor Length of Stays by Income Level (Source: StreetLight Data)

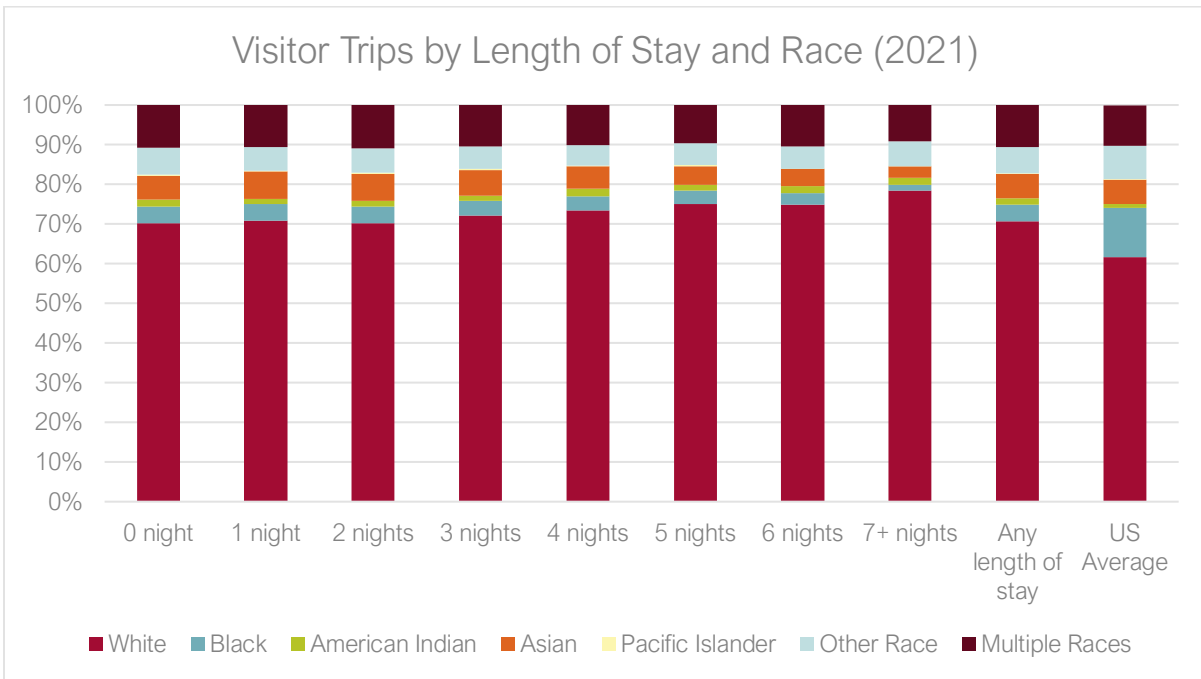


Figure 14. Visitor Length of Stays by Race (Source: StreetLight Data).

3.2.4 Home Geography of Visitors

The StreetLight Data custom analysis was also able to provide a breakdown of home geography for visitors cross-tabulated against the lengths of visitor stays. **Figure 15** provides this breakdown at the state level, while **Figure 16** provides this breakdown at the county level, highlighting major counties in Arizona versus out-of-state visitors.

- Across any length of stay, 54% of visitors are from Arizona. For individual-day trips, this skews heavily toward Arizona residents, at 90% of all visitors. For multi-day trips, other states are much more represented, with California having by far the highest percentage of out-of-state travel (13% of all visitors across any length of stay). Other states comprising at least 2% of visitors include Colorado, Florida, Illinois, Michigan, Ohio, and Texas.
- For longer lengths of stays, the percentage of Arizona residents increases as compared to stays of one to five nights. Similar to the trend shown relating to income levels, this could possibly represent longer-term stays from people staying with friends and family. Also, note from **Figure 10** that visitor stays of more than five nights represents a very small percentage of visitors (approximately 3 percent of visitors).
- Within Arizona, across all lengths of stays, Yavapai County is the most represented (33% of all visitors and 62% of visitors from Arizona). This skews heavily toward day trips (69% of all single-day visitors). From a review of the underlying visitor data census tracts, most of these Yavapai County visitors are from communities southwest of the City but outside of the “Greater Sedona Area” boundary (communities such as Cottonwood, Clarkdale, Cornville, and Camp Verde). See **Figure 17** for a further breakdown of visitor home census tracts from Yavapai County. Furthermore, most visitors from Yavapai County are going to the two zones on the west side of the City: West Sedona Residential and West Sedona Commercial. In total, 75% of visitor trips from Yavapai County are to those two zones, whereas those two zones represent approximately 50% of all visitor trips from anywhere. Kimley-Horn coordinated with StreetLight Data to look at individual trips and confirmed that there were a significant number of visitor-classified trips from Yavapai County that make multiple day trips within a single month. While these visitors would not be considered “tourists”, they are still classified as visitors because they do not live or work within the Greater Sedona Area boundary. These trips essentially represent more frequently-occurring “non-home/work” trips between adjacent communities: people visiting friends or family, going to the movies, shopping, restaurants, recreation, etc.
- For stays of one night or more, Maricopa County is the most represented Arizona County and comprises 17% of all one-night visitors (including out-of-state) and 19% of all two-night visitors (including out-of-state). Maricopa County represents 12% of all visitors overall across all stays.

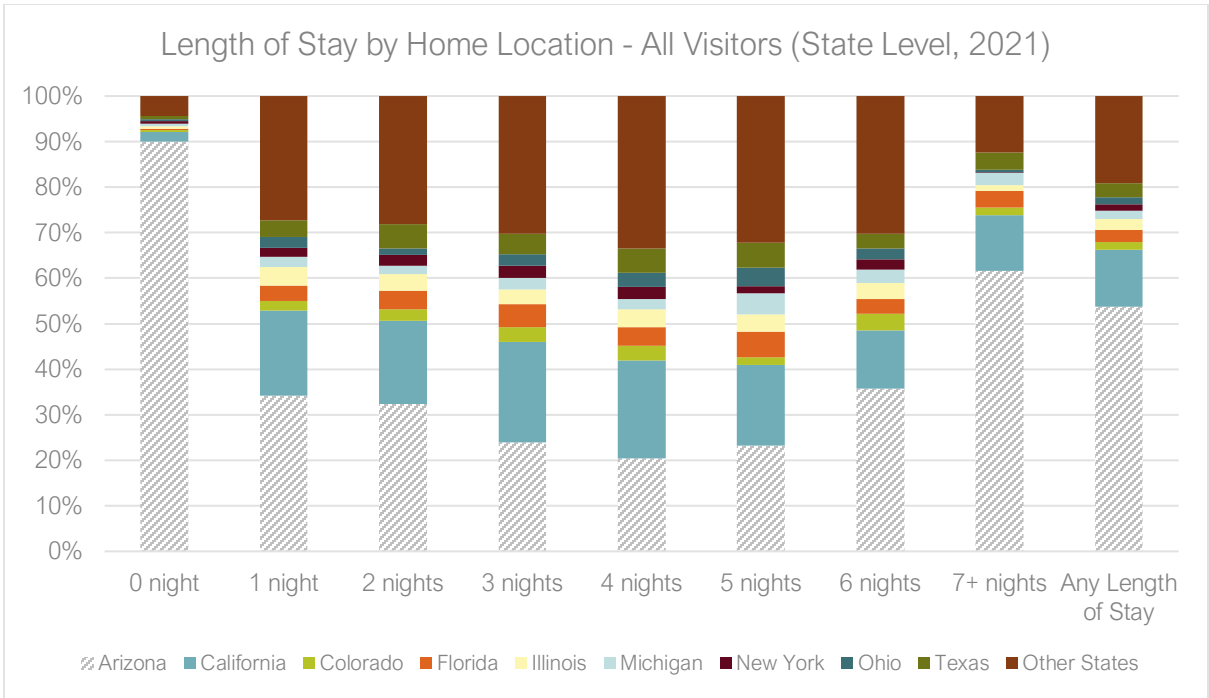


Figure 15. Visitor Length of Stays by Home Location – State Level (Source: StreetLight Data).

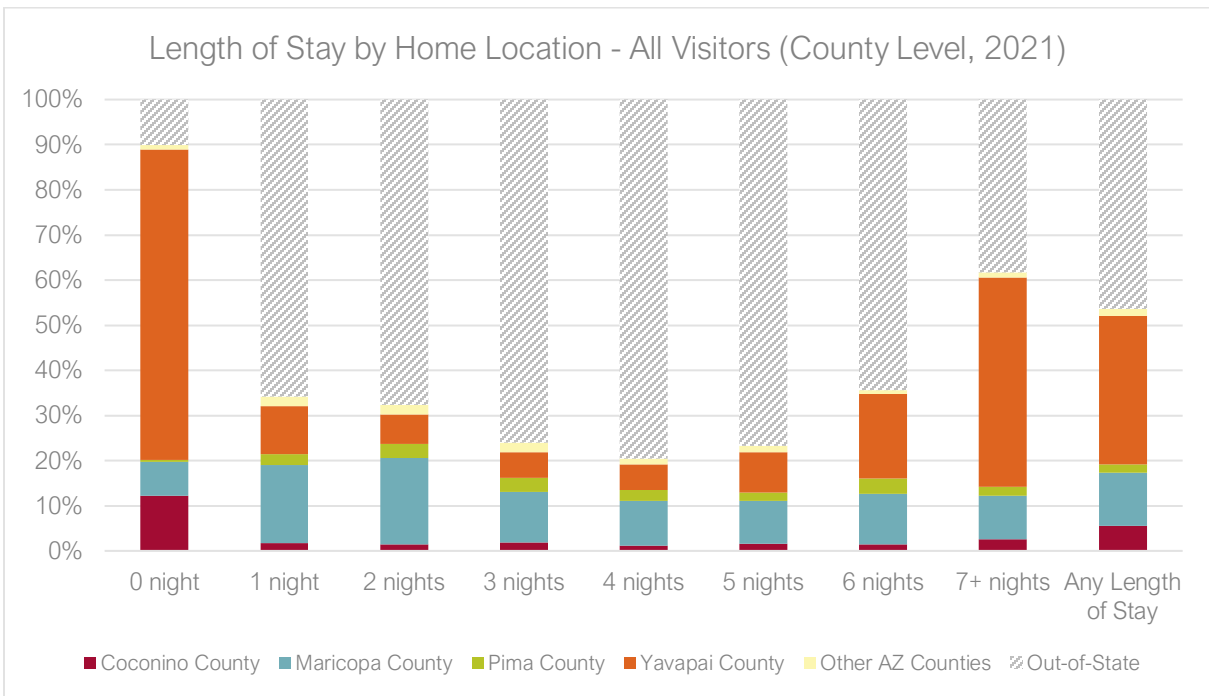


Figure 16. Visitor Length of Stays by Home Location – County Level (Source: StreetLight Data)

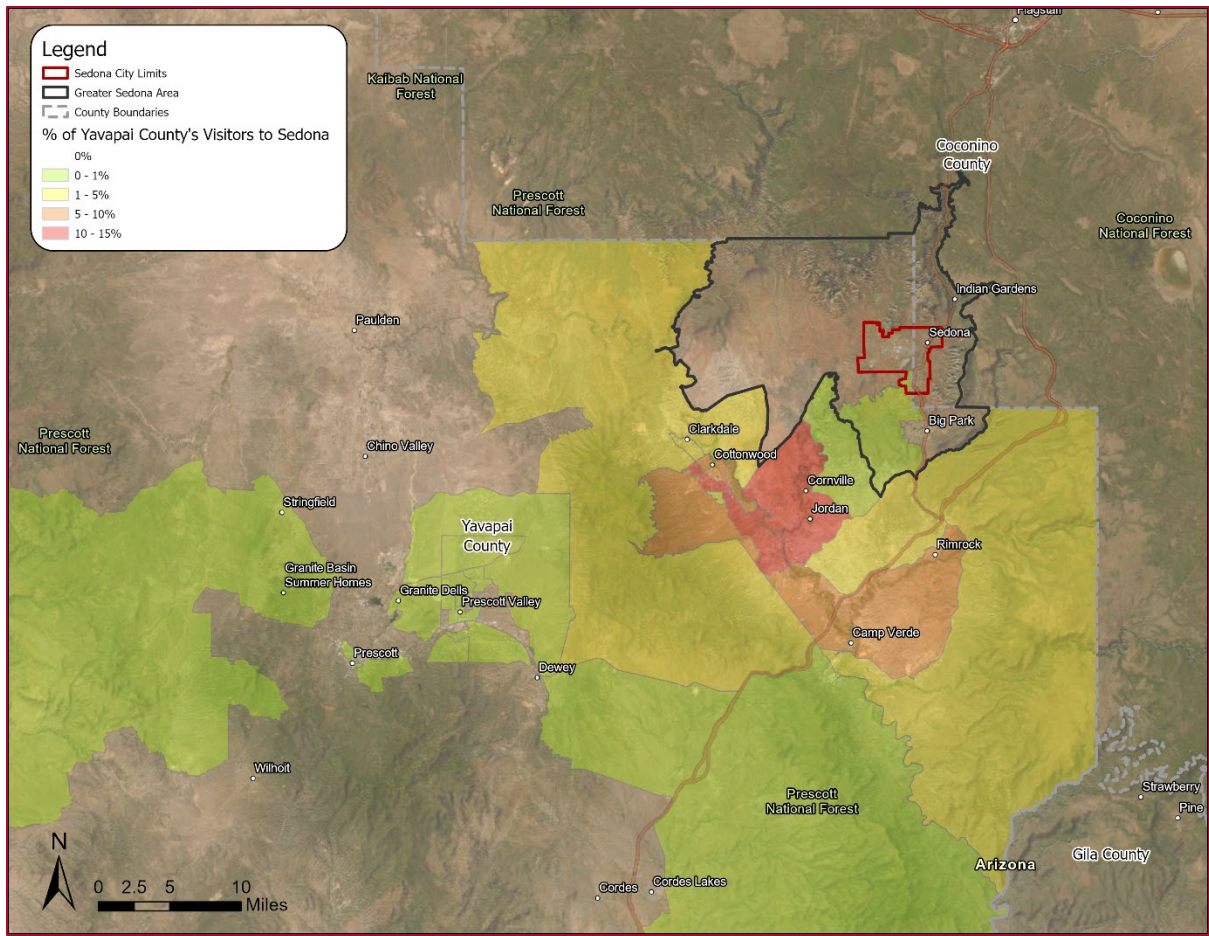


Figure 17. Breakdown of Yavapai County Visitors to Sedona – Home Census Tracts.

3.3 ADDITIONAL BIG DATA FINDINGS

City staff also expressed a desire to understand if novel data sources could reasonably estimate the following:

- Number of commuter workers and residents in the City by time of year (i.e., fall vs. spring)
- Home locations of workers / work locations of residents
- Estimated number of person trips being made by mode (e.g., auto, walk, bike) and how these relative levels of activity vary across the year.

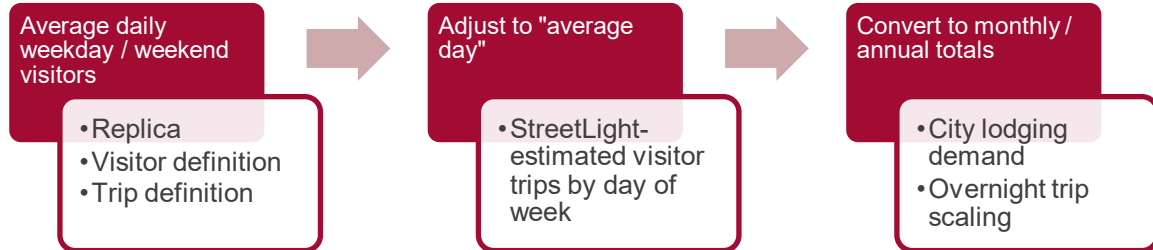
Replica's synthetic population model outputs include a trip table of all person trips within a user-supplied geographic filter. This trip table, which is at the core of the proposed visitor estimation methodology recommended for future use, also allows the user to explore other breakdowns of travel:

- **Home locations of Sedona workers:** using Replica's Fall 2022 outputs, it is estimated that approximately 38% of Sedona workers live within the City limits. The majority of these workers who live within the City limits live in West Sedona (30% of all workers). Approximately 85% of Sedona workers live in Yavapai County, and approximately 15% live in Coconino County.
- **Work/school locations of Sedona residents:** using Replica's Fall 2022 outputs, it is estimated that approximately 56% of Sedona residents work or go to school within the City limits (of residents who work or go to school).
- Approximately 67% of Sedona residents work in Yavapai County, while 32% work in Coconino County and 1% work elsewhere (mainly Maricopa County).
- **Mode split:** using Replica's Fall 2022 outputs and transit shuttle ridership data provided by City staff, it is estimated that on an average weekday:
 - Just over 90% of all trips starting or ending in the City limits (excluding pass-through trips) are made by car (including car passengers, on-demand vehicles, and commercial trucks).
 - Approximately 7% of trips are made by walking.
 - Approximately 2% of trips are made by bus.
 - The remaining 0.8% of trips are made by bike.

At this time, it is not recommended to use StreetLight Data or Replica to understand the variation in commuter workers and residents in the City *throughout the year*. Replica, through a separate module known as "Trends", does provide week-to-week mode split estimates for a user-specified geography, such as the City of Sedona. However, from discussing with Replica staff, these week-to-week estimates are calibrated at a regional level and likely not well-calibrated to the size and uniqueness of Sedona. Based on a review of these week-to-week estimates, which do not show the seasonal fluctuations present in many of the datasets specific to the City of Sedona, Kimley-Horn does not recommend the use of Replica to estimate week-to-week or seasonal mode split for the City of Sedona at this time. Replica could still be used to estimate mode split on an annual basis and be tracked over time.

Appendix: Future Visitor Tracking Methodology

The following provides a detailed step-by-step process for conducting an annual visitation estimate that could be repeated in the future. Specific steps, user inputs, and adjustment factors are documented on the following pages. The figure below provides a high-level overview of the process, which involves using Replica to obtain “average Thursday” and “average Sunday” visitor estimates for a given season of the year and then applying adjustment factors to extrapolate these estimates to the entire year. **This does require that either the City obtain a subscription to Replica or utilize a consultant with a subscription to Replica.** The examples shown are to produce the 2021 visitor estimates. Kimley-Horn has provided an accompanying spreadsheet to demonstrate this process for the 2021 visitor estimates.



Annual visitor estimation methodology overview.

Step 1: Use Replica Places to obtain estimated average daily number of visitors.

- Using the “Studies” (formerly known as “Places”) module, set up a new Study.
- Edit the Data Source to include the Southwest region. For consistency with this report, use the Fall season for whichever year you are conducting a visitor estimate. Separate analyses will need to be run, first using “Thursday” as the typical day and then again using “Saturday” as the typical day.
- Add a filter → “Trip Intersects” (all trips that started, ended, or passed through the selected geography) → use Cities as the geographic breakdown and zoom in and click on the boundary for the City of Sedona city limits.

Add a Filter



Add filters to exclude specific data from your study. Filters are additive (AND).

All Filters
Trips
People
Geographic

- Trip Duration (minutes)**
 The duration of a trip, in minutes, determined by the start and end time of the trip. Trips
- Trip End Time**
 The end time for each trip. Trips
- Trip Intersects**
 All trips that started, ended, or passed through the selected geography. Includes trips routed over network links like private auto, walking or biking trips, as well as trips using subway or rail. Trips, Geographic
- Trip Origin**
 The geographic origin of a trip. Trips, Geographic
- Trip Origin Building Use**
 The building use category of each trip's origin point if the trip originated in a building. Trips

- Switch from the “Map” view to the “Dataset” view. This may take a minute to load, but the resulting trip table represents all trips modeled over the course of a day – taken by anyone – that start, end, or pass through the city limits.

Filters Southwest, Fall 2021, Sat | Trip Intersects: 1

Map | **Dataset**

Trips | People

The trip table represents the traveling population for your selected geo. The rows below are a preview of the data that meets the applied set of filters including origin, destination, mode, and distance. [Learn More](#)

Manage Attr

Showing first 100 of all 81,835 rows

Activity ID	Trip Origin Block Group	Trip Origin Tract	Trip Origin County	Trip Origin State	Trip Origin Mode
4574441820664752899	1 (Tract 10, Coconino, AZ)	10 (Coconino, AZ)	Coconino	Arizona	N
18218953596715159207	1 (Tract 16.01, Coconino, ...)	16.01 (Coconino, AZ)	Coconino	Arizona	Si
10257571440148773445	1 (Tract 16.02, Coconino, ...)	16.02 (Coconino, AZ)	Coconino	Arizona	U
5858817433486313246	1 (Tract 16.02, Coconino, ...)	16.02 (Coconino, AZ)	Coconino	Arizona	U
7833110639255257494	1 (Tract 16.02, Coconino, ...)	16.02 (Coconino, AZ)	Coconino	Arizona	U
15644533001642211930	1 (Tract 16.02, Coconino, ...)	16.02 (Coconino, AZ)	Coconino	Arizona	U
13731418368799730814	1 (Tract 16.02, Coconino, ...)	16.02 (Coconino, AZ)	Coconino	Arizona	U
6763116997596007553	1 (Tract 16.02, Coconino, ...)	16.02 (Coconino, AZ)	Coconino	Arizona	Si
3736304690336667696	1 (Tract 16.02, Coconino, ...)	16.02 (Coconino, AZ)	Coconino	Arizona	Si

- Download the dataset. Make sure that under “Manage Attributes” you are capturing the Trip Taker Home Block Group and Trip Taker Work Block Group. Using these fields, this will allow filtering out of any trip takers who live or work within the block groups representing the Greater Sedona area, not just the city limits.

- Repeat this process for “Saturday” as the typical day, once completed using “Thursday” as the typical day.
- Open the datasets in Excel or the data wrangling software of your choice, and combine into a single trip table. Make sure to add a field that delineates whether a trip is being taken on a weekday or weekend. Add field(s) in the dataset to look up whether or not the trip taker home block group and trip taker work block group fall within the Greater Sedona area (see table below). Set up an additional field to classify a trip taker as a “visitor” *if they neither live nor work in one of these block groups*:

Greater Sedona Area Block Groups	
1	(Tract 16, Coconino, AZ)
2	(Tract 16, Coconino, AZ)
3	(Tract 16, Coconino, AZ)
1	(Tract 18.02, Yavapai, AZ)
2	(Tract 18.02, Yavapai, AZ)
3	(Tract 18.02, Yavapai, AZ)
1	(Tract 18.01, Yavapai, AZ)
2	(Tract 18.01, Yavapai, AZ)
2	(Tract 17.02, Yavapai, AZ)
3	(Tract 17.02, Yavapai, AZ)
1	(Tract 17.03, Yavapai, AZ)
2	(Tract 17.03, Yavapai, AZ)

- Using a PivotTable or a scripting process, aggregate the trips by person (“trip_taker_person_id”) and provide a count of all trips (count of “activity_id”) for each person. Apply a filter to only show the trips for those persons classified as visitors, and another filter for weekdays/weekends. The resulting output table will provide a listing of all visitor-classified trip takers (visitors) and the count of their trips on an average weekday/weekend day.
 - The count of the number of rows in this table (the number of trip taker person IDs) is the number of visitors for a weekday or weekend day of that season, with one caveat: Replica does not use a person ID for “out of region” trips, which will likely constitute a large number of trips (likely well over 1,000 or more).
 - In order to convert the out-of-region trips to visitors, use the ratio of the number of trips made by in-region visitors to the number of in-region visitors (likely in the range of 2.5 to 3.5 trips per day). Divide the number of out-of-region trips by this ratio to obtain the number of out-of-region visitors, and add this number to the visitor total.

	B	C
1	Average Daily Trips - Replica Estimates	
2	Sedona Visitors (Fall 2021)	Visitors
3	Average Weekday (Thursday)	12,302
4	Average Weekend Day (Saturday)	12,509

Step 2: Apply adjustment factors to Thursday/Saturday estimates to get to “average day”.

- Kimley-Horn used StreetLight Data (the standard project subscription, not the custom subscription), to obtain estimates of the number of visitor trips by day of week, averaged across all of 2021. Using these averages for each day of week, a ratio can then be calculated against either a Thursday or Saturday for each day. The table below shows these ratios for 2021, which can be used as a starting point moving forward in the absence of better data.

Weekday	Versus	Visitor Ratio vs. Thursday/Saturday
Sunday	Saturday	86%
Monday	Thursday	101%
Tuesday	Thursday	97%
Wednesday	Thursday	97%
Thursday	Thursday	100%
Friday	Thursday	115%
Saturday	Saturday	100%

- Using these ratios, adjust the Thursday/Saturday estimates provided in Step 1 to produce an estimated number of visitors by day of week, and then average these across all days of the week to obtain an “average day”. In the example below, the estimates represent an average day in Fall 2021 (September through November).

	B	C
1	Average Daily Trips - Replica Estimates	
2	Sedona Visitors (Fall 2021)	Visitors
3	Average Weekday (Thursday)	12,302
4	Average Weekend Day (Saturday)	12,509
5		
6		
7		
8	Apply Adjustment Factors to Average Daily Trips by Weekday (Fall 2021)	
9	Weekday	Visitors
10	Sunday	10,758
11	Monday	12,480
12	Tuesday	11,882
13	Wednesday	11,887
14	Thursday	12,302
15	Friday	14,175
16	Saturday	12,509
17	Average Day Fall 2021 (Average All Days)	12,285



Step 3: Apply monthly adjustment factors.

- Now that we have the estimated number of visitors on an average day in September – November, we need to adjust these to an average day for each individual month. The following table shows suggested monthly adjustment factors based on lodging demand from

Smith Travel Research. Note that these factors are the ratio of each month's lodging demand against the average monthly lodging demand for September – November 2021.

Month	Lodging Demand Ratio vs. Fall (Sep-Nov Avg)
January	60%
February	70%
March	105%
April	107%
May	112%
June	100%
July	86%
August	78%
September	92%
October	109%
November	100%
December	82%

- Apply these monthly adjustment factors to estimate each month's average daily visitors, and then multiply by the number of days per month to get monthly visitors.

<u>Average Day Fall 2021 (Average All Days)</u>		<u>12,285</u>
		
Apply Adjustment Factors for Seasonality to Average Daily Trips by Weekday (All Months 2021)		
<u>Average</u>		
Month		Visitors
January		7,315
February		8,570
March		12,866
April		13,199
May		13,735
June		12,326
July		10,504
August		9,533
September		11,256
October		13,354
November		12,244
December		10,073
		
Multiply to Annual Totals		
<u>Average</u>		
Days	Month	Visitors
31	January	226,751
28	February	239,953
31	March	398,861
30	April	395,960
31	May	425,798
30	June	369,777
31	July	325,626
31	August	295,526
30	September	337,670
31	October	413,983
30	November	367,320
31	December	312,276
365	Total	4,109,502

- The final step is to adjust the number of “individual day” visitors by a factor that accounts for a percentage of visitors that stay for multiple nights, which we have from the StreetLight Data custom analysis. An “overnight factor” can be developed using the percentage of visitors that stay for each corresponding number of nights. For example, a visitor who stays overnight for one night would count as 0.5 “individual day” visitors, and a visitor who stays overnight for two nights would count as 0.33 “individual day” visitors, and so forth. This adjustment is made so that visitors staying multiple nights are not counted as multiple visitors. The calculations on the following page show the adjustments being made for 2021.

Adjust for overnight visitors using length-of-stay data									
Data Period	0 night	1 night	2 nights	3 nights	4 nights	5 nights	6 nights	7+ nights	
6: Mar 1-Apr 30, 2021	71.2%	15.9%	5.0%	3.3%	2.0%	0.9%	0.5%	1.2%	Mar-Apr
7: Jul 1-Aug 31, 2021	63.0%	16.9%	6.3%	4.2%	3.2%	1.8%	1.3%	3.3%	Jul-Aug
8: Oct 1-Nov 31, 2021	69.4%	15.1%	5.3%	3.3%	2.1%	1.4%	1.0%	2.4%	Oct-Nov
9: Dec 1, 2021-Jan 31, 2022	65.3%	16.2%	7.1%	4.7%	2.8%	1.5%	0.6%	1.8%	Dec
1: Jan 1-Dec 31, 2021	67.8%	16.4%	5.5%	3.6%	2.4%	1.3%	0.9%	2.1%	use for all other months
<i>Corresponding # of "individual day" visitor trips:</i>	1	0.5	0.33333333	0.25	0.2	0.16667	0.14286	0.125	
Average									
Month	"Individual Day" Visitors	Overnight Factor	Adjusted Visitors						
January	226,751	0.798	181,012						
February	239,953	0.798	191,551						
March	398,861	0.824	328,617						
April	395,960	0.824	326,226						
May	425,798	0.798	339,909						
June	369,777	0.798	295,187						
July	325,626	0.761	247,865						
August	295,526	0.761	224,952						
September	337,670	0.798	269,557						
October	413,983	0.807	333,975						
November	367,320	0.807	296,330						
December	312,276	0.780	243,631						
Total	4,109,502		3,278,812						
Total (Rounded)	4,110,000		3,280,000						

SEDONA TOURISM STRATEGIC PLAN 2024 – 2025

MISSION

Sedona inspires its visitors and residents to discover the wonder of the destination and protect it for generations to come

VISION

The City of Sedona Tourism Program bolsters the local economy while championing environmental stewardship and supporting a strong community for all

POSITION

The City of Sedona Tourism Program is the only entity poised to lead and manage Sedona as a world-renowned destination and tourism economy, balancing the needs of residents, businesses, and visitors by:

- Owning and championing the brand that shapes Sedona’s tourism economy
- Utilizing the City’s willingness and expertise to holistically manage the destination from marketing to infrastructure
- Leveraging critical data and research to manage the destination, empower businesses, and inform the community
- Being responsive to residents, businesses, partners, and visitors
- Executing targeted destination marketing and communications
- Leading collaboration and regional/peer agency cooperation that makes tangible progress possible

IMPERATIVES AND INITIATIVES



Imperatives	Initiatives	Action Steps	Key Measures
Manage And Steward The Destination	Increase awareness and education of ways to reduce vehicle congestion	Develop and help distribute a transit marketing toolkit that builds awareness of the city's transit options, and that is shared with industry partners	1) A transit marketing toolkit is shared with all Sedona businesses twice year 2) 3 car-free itineraries are published on ScenicSedona.com 3) Participation in transit options shows year-over-year growth
		Publish car-free itineraries that communicate how to experience Sedona without a passenger vehicle	
		Explore opportunities to amplify real-time information about capacity at parking lots and travel times to key areas	
	Prioritize marketing investments during off-peak times of the week and year	Define annual peaks and valleys in visitation to understand need times (i.e. valleys) for driving demand for tourism	1) A yearly snapshot report is developed that defines our monthly peaks and valleys based on occupancy and visitation to Sedona over the last 5 years 2) Campaign toolkits are shared with all Sedona businesses twice a year 3) A baseline Return on Investment (ROI) is established for summer and winter campaigns 4) A baseline for growth during the valleys is established 5) Define and execute a target for growth in the valleys
		Conduct strategic consumer marketing campaigns during summer and winter that focus on driving demand during the valleys and that target visitors from locations that align with our values, stay longer, and spend more	
		Partner with local businesses to participate in campaigns (e.g. new offerings, discounts) and augment campaign messages on their own channels	
		Bolster campaign reporting that focuses on attribution that proves our advertising is effective at inspiring travel	
	Encourage responsible & respectful use of Sedona throughout the year	Host a focus group with local leaders to validate the priority behaviors we want to influence at different types of sites and different times of year	1) A list of priority behaviors and key messages are validated for 2025 2) An "Always On Educational Marketing Campaign" is launched 3) A educational campaign toolkit is shared with all Sedona businesses once a year
		Develop strategic messages related to the priority behaviors that can be targeted to different audiences before and during trips to Sedona (i.e. think before you come vs think while you're here)	
		Compile a list of local non-profit entities that visitors can donate their time or money to projects that benefit visitor experience in Sedona	
		Conduct an "Always On Educational Marketing Campaign" that invites visitors to Sedona to engage in responsible and respectful use behaviors	
		Develop and distribute an educational messaging toolkit that sets expectations for responsible and respectful use throughout the year, and that is shared with industry partners	
Partner with city departments to advance projects that better manage visitation throughout the year	Partner with the City of Sedona Public Works department to assist with moving Sedona In Motion (SIM) projects forward, and educate visitors and residents about completed milestones	1) Attend bi-monthly SIM meetings 2) Attend bi-monthly transit marketing meetings 3) Newsletters highlights 1 city program each month	
	Partner with the City of Sedona Sustainability department to assist with their goals to reduce city-wide greenhouse gas emissions		
	Educate visitors about the different city programs that are in place that benefit visitor experience, such as transit use and dog poo waste reduction		
	Explore what role the tourism department can play in advancing larger city goals		
Optimize Economic Impact	Integrate the new Sedona tourism brand throughout the City's tourism activities, materials, and marketing campaigns	Successfully complete the branding initiative to validate the name, logo, and brand guidance for the City of Sedona Tourism Program	1) The branding initiative is approved by the TAB and City Council 2) Brand execution has been updated across city channels
		Audit current brand execution and update utilization to the new brand	
		Integrate the new brand and related guidelines into all tourism activities	
	Bolster digital marketing content to increase website traffic and social engagement	Develop an annual editorial calendar that defines themes, cadence, and channels	1) An editorial calendar is developed 2) A baseline for digital engagement is established
		Publish paid and organic content on all digital marketing channels throughout the year in accordance with the editorial calendar	
		Implement regular blog and newsletter content in accordance with the editorial calendar	
		Optimize website and digital marketing channels as new images and campaign creative are developed	
	Leverage earned media and travel trade to enhance Sedona's reputation as a leading national destination	Compile a list of successful earned media and media events within the last 3-5 years, identify priority journalists/publications, and compile examples of earned media and media events with the highest return on investment	1) A list of priority earned media contacts is developed 2) A list of priority group sales and travel trade is developed 3) A baseline for earned media performance is established 4) A baseline for group sales and trade is established 5) Sales kits are developed for earned media, group sales, and travel trade
		Compile a list of successful group sales, travel trade partners, and meetings sales events within the last 3-5 years and identify priority organizations to work with opportunities for the City of Sedona (e.g. compression calendar, event planner)	
		Conduct outreach with local Group Sales Managers at hotels and explore potential resources and activities that could enhance travel trade and group sales opportunities for the City of Sedona (e.g. compression calendar, event planner)	
Develop an integrated strategy for conducting outreach with earned media and travel trade that targets priority opportunities and invests in having a presence at conferences and events with the highest return on investment			
Work directly with the Arizona Office of Tourism to understand opportunities to leverage additional resources to capture high-value earned media and travel trade			
Build up an asset inventory and offer local marketing co-ops	Gather input from the local tourism industry related to creative asset gaps and conduct creative asset production shoots with local photographers	1) The city manages a creative asset wish list 2) 2 creative asset production shoots are conducted 3) A creative asset library is available to industry partners	
	Organize all creative assets within an asset management system and provide access to creative assets as a benefit to local partners		

		Explore the development of local cooperative marketing programs between the City of Sedona and local tourism businesses (e.g. social media campaign matches, photography buy-ins, etc)	4) 1 cooperative marketing program is available for the industry
	Be a supportive partner to tourism-related businesses in Sedona	Regularly meet with local tourism businesses and gather input on emerging barriers and opportunities for advancing tourism in Sedona Integrate Book Direct onto ScenicSedona.com as a way to drive demand for hotel reservations Explore opportunities to advance tourism-related workforce in Sedona (e.g. frontline staff training, and skills-based training)	1) BookDirect is integrated into ScenicSedona.com 2) Tourism staff attend 1 industry meeting per month 3) Tourism Manager initiates meetings with 100% of hotel proprietors within City of Sedona
Enhance Community Engagement With Tourism	Advance partnerships with tourism-related economic development, government organizations, and non-profits	Compile a contact list of priority economic development organizations, governmental organizations, and non-profits to explore partnerships with Regularly meet with organizations across the tourism value chain to build awareness of the city's role in managing tourism, understand active or planned efforts that impact the tourism industry, and explore opportunities to collaborate on successful outcomes Continue to foster relationships with the Sedona Lodging Council and the Sedona Chamber of Commerce and engage in resource mapping to maximize benefits to local businesses	1) Tourism staff attend monthly Lodging Council meetings 2) Tourism updates are provided to City Council 2 times per year 3) Tourism staff attend 1 industry meeting per month
	Create and execute a communications plan that builds awareness of the value of the City's investments in tourism and the City's commitment to quality of life	Conduct a review of the ways that the Chamber of Commerce and other tourism organizations have previously communicated the value of tourism in Sedona Conduct research on the state, county, and city taxes that visitors pay into, and develop an understanding of how those taxes are invested locally to advance community values Develop a "Brought To You By Tourism" campaign that includes key messages that are segmented by local audiences within the community (e.g. residents, businesses, elected officials) and value propositions for each segment Present the draft campaign to the Tourism Advisory Board and gather input on ways to enhance implementation of the plan Execute the communications plan and explore storytelling opportunities that highlight members of the local community that directly and indirectly benefit from the success of the tourism industry	1) A "Brought To You By Tourism" campaign is launched 2) 3 "Faces of Tourism" stories are developed
	Create a "State of Sedona Tourism" transparency hub on the city's website that tracks the progress of this plan	Develop the wireframe for presenting the transparency hub on the City website and define the information architecture for presenting updates on the City's efforts to adopt the Tourism Strategic Plan Regularly compile relevant data and information that can be used to update the transparency hub on a monthly basis Publish and promote the transparency hub within the local community	1) A "State of Sedona Tourism" transparency hub is launched and updated monthly
	Regularly monitor community perceptions of timely tourism challenges and opportunities	Host tourism town hall events that are open to the public to learn about the state of Sedona tourism and gather feedback on the role of tourism within the community Explore opportunities to include questions related to resident sentiment on tourism topics in city surveys	1) 2 Tourism Town Halls are hosted
	Enhance the City's tourism-related data portfolio to make more informed decisions and measure results	Assess the current inventory of tourism-related research and data, optimize presentation of the information, and assess redundancies and gaps Gather input from local tourism leaders to understand priority tourism industry performance metrics and the types and cadence of reports that are shared publicly (i.e. lodging performance summaries in newsletters) Integrate key findings from research into all aspects of tourism operations, and explore opportunities for predictive analysis that can forecast the need for increased investments in management or marketing throughout the year	1) Tourism performance reports are shared monthly
	Strengthen The Organization	Increase the City's capacity to develop, manage, and promote tourism	Onboard the new Tourism Manager for the City of Sedona Assess staff capacity gaps within the City of Sedona Tourism Program, develop an appropriate job description for a Tourism Coordinator, and hire an appropriate candidate for the position Define the structure for the next Tourism Strategic Plan and assess whether an updated Sustainable Tourism Plan is also needed Encourage teambuilding and a positive internal culture with monthly team meetings and outings
	Participate in national, state, and local tourism conferences and events	Compile a list of priority national, state, and local tourism conferences and events, and attend the most strategic events Attend the annual Arizona Governor's Conference on Tourism (GCOT) to network and explore partnerships with other Arizona tourism industry leaders	1) City of Sedona attends the annual GCOT 2) 2 additional professional development events are attended