



# CITY OF SEDONA

## **TOURISM PROGRAM**

Tourism Advisory Board  
November 6, 2024 Meeting

# Upcoming TAB Meeting Updates

- We would like to propose moving the December 2024 meeting from December 4 to December 11
- We would like to propose canceling the January 1 2025 meeting
- Update on the 11<sup>th</sup> TAB member



# FAM Updates

- August
  - AAA Travel Agents
- September
  - Julie Loffredi, *MSN*
- October
  - Robin Flanigan, *AARP*
  - Mexico Virtuoso Travel Agents
  - Sandrine Faucher, *Québecor & NumériQ*
- November
  - AAA Travel Agents
  - Monica Fish, *MSN*
  - Liz Humphreys, *Condé Nast Traveler*
  - Crai Bower, *Condé Nast Traveler*
  - Michiko Ono Amsden, *CREA WEB*

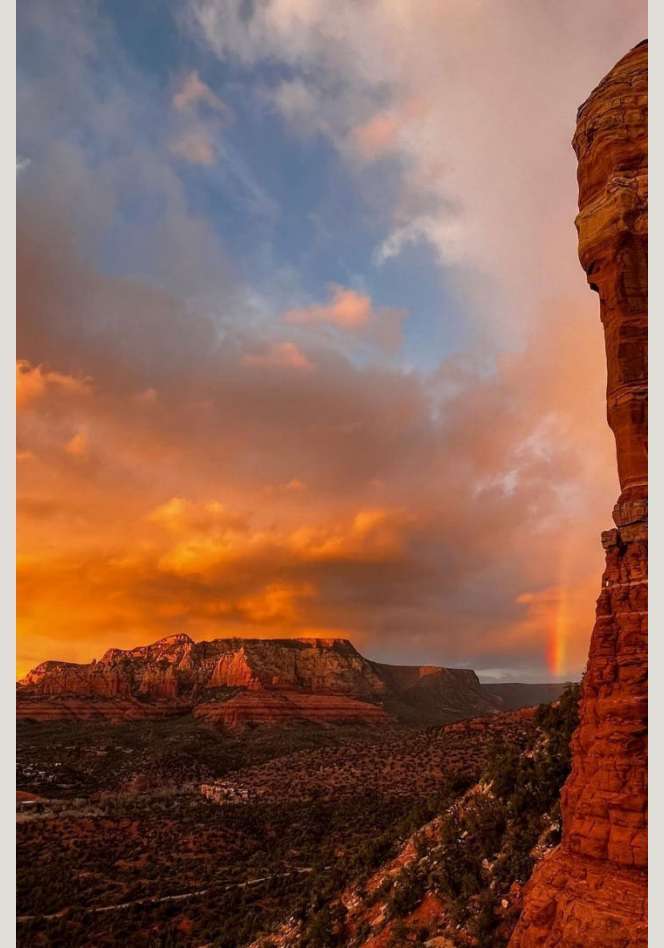




# TOURISM PROGRAM

# FY25 Trade Show Updates

- November
  - NTA Travel Exchange
  - Travel Classics West
- January
  - GoWest Summit
- March
  - AOT UK & France Sales and Media Mission
- June
  - IPW

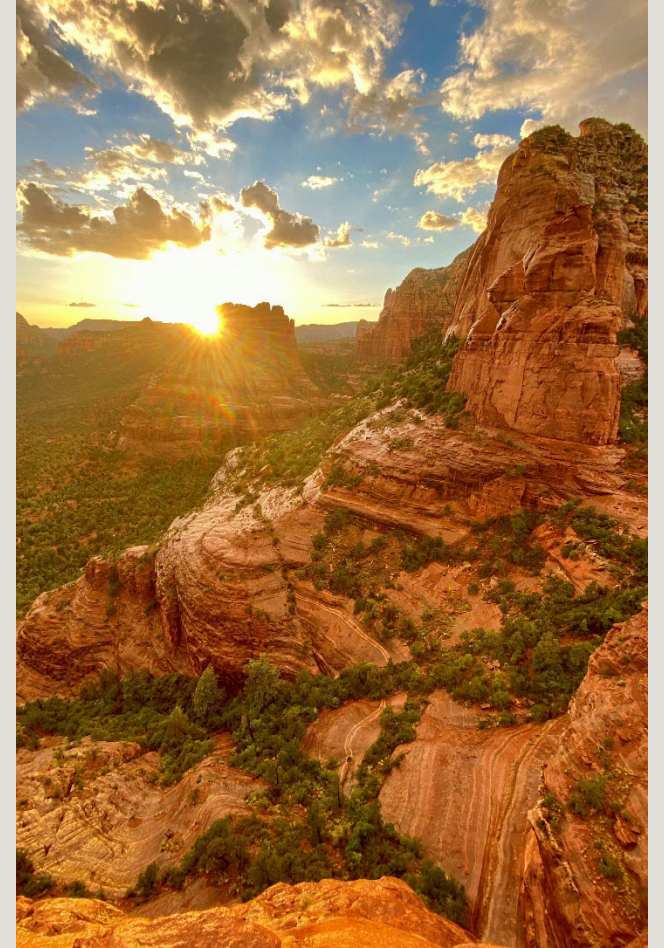




# Developing A Visitor Services Recommendation For City Council

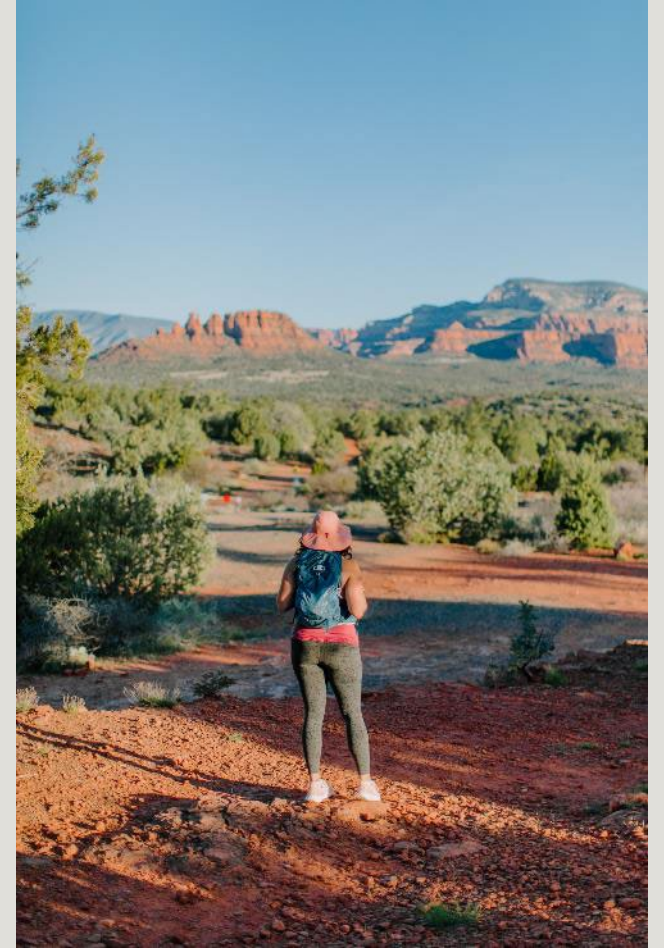
# Recap

- The TAB has been discussing Visitor Services in Sedona since August 2024
- These discussions were requested by Sedona City Council, with the goal of exploring all available options for delivering Visitor Services in FY26
- The objective is for the TAB to submit a recommendation through City staff to Sedona City Council that outlines what Visitor Services should be available in Sedona in FY26



# Agenda Items From Earlier Discussions

- The discussions during previous TAB meetings have included:
  - A review of Sedona Visitor Center performance
  - Visitor center case studies in Arizona and adjacent states
  - Brainstorming opportunities to increase engagement with Visitor Services in Sedona
  - Exploration of technology-based solutions to Visitor Services
  - A review of the Sedona Visitor Center budget





# Key Takeaways So Far

- Visitor Services are provided by a variety of sources that include visitor centers, frontline staff, and the Sedona Shuttle
- A physical visitor center is a necessary component for delivering Visitor Services in Sedona
- The Sedona Visitor Center budget does not include any obvious cost saving opportunities
- The TAB is interested in exploring how best to invest in technology-based solutions that digitizes visitor information and increases access to Visitor Services beyond a physical visitor center



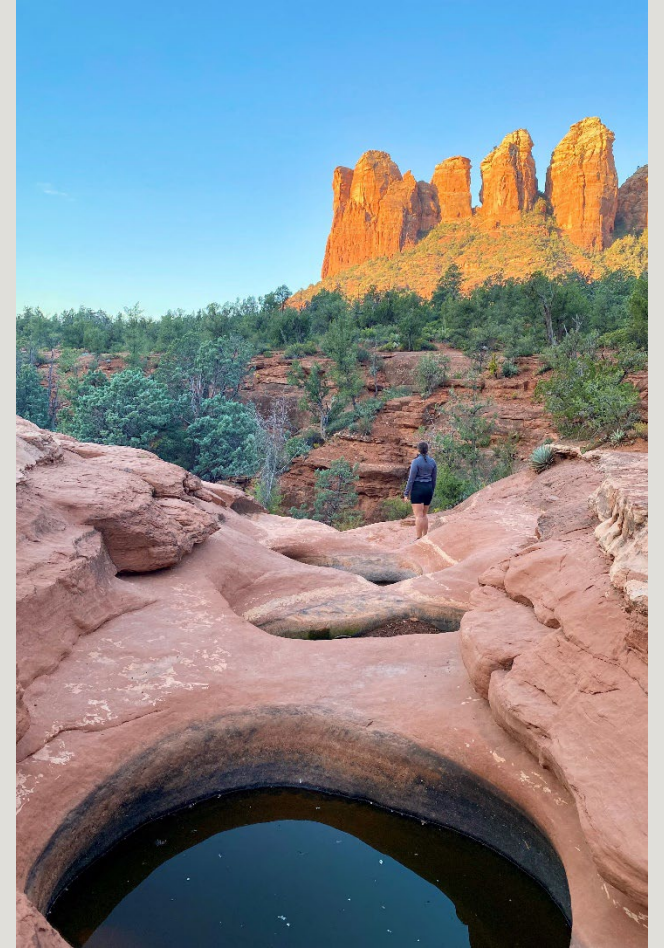
# The Current Trajectory

- We are seeing the following outputs emerging from these discussions:
  - Suggestions to enhance the physical space within the Sedona Visitor Center
  - Presentation of a strategy to implement technology-based Visitor Services (i.e. digital informational kiosks)
  - Presentation of a strategy to increase the access to Visitor Services in Sedona (i.e. satellite/mobile locations)
  - Presentation of a strategy to align and enhance the presentation of visitor information across the various entities that deliver Visitor Services in Sedona (i.e. Red Rock Ranger District Visitor Center and Sedona Shuttle)

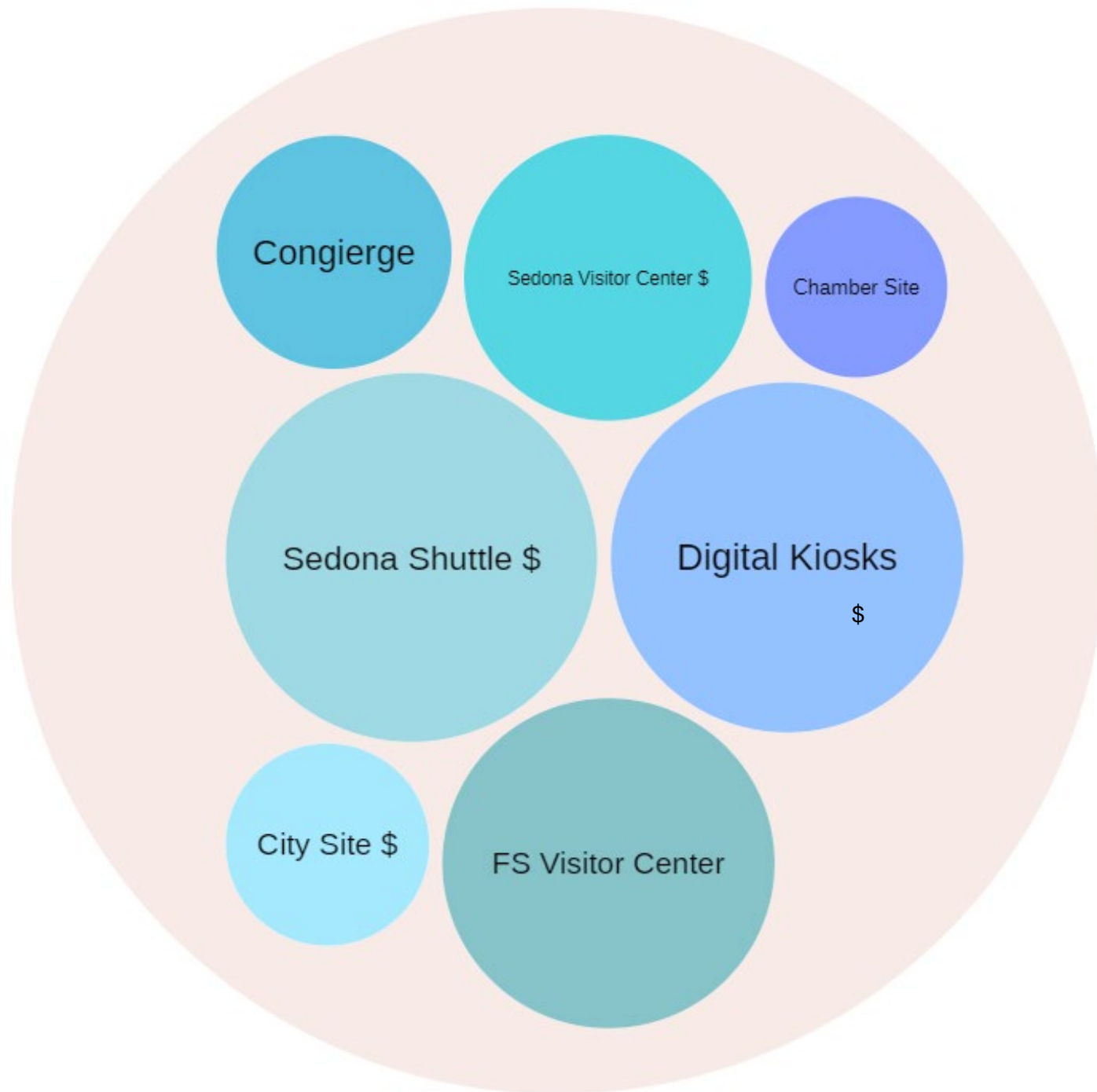


# Developing A Recommendation


- Our team has been compiling input from the TAB since August
- At the December TAB meeting we will provide a list of recommendations that the TAB will finalize during a group discussion
- City staff will then develop and submit a formal recommendation to City Council as part of the FY26 budgeting process



Level



TOU



# **Digital Informational Kiosk Discussion**

# Context

- One question we've been trying to answer is how to think outside of a physical space to deliver Visitor Services
- Digital informational kiosks have emerged as a strong avenue to achieve this
- City staff have been conducting a review of available service providers and asking other destinations about their experience with implementing a kiosk strategy



# Recent Findings

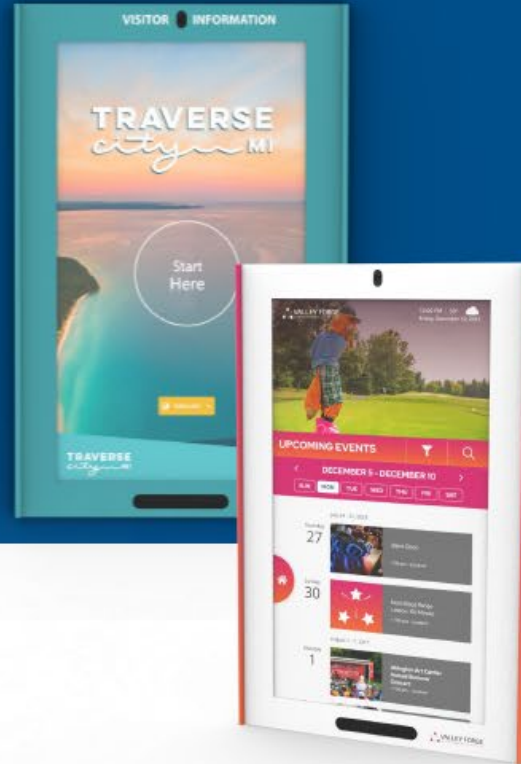
- Available providers include TrueOmni, HootBoard, and RoveIQ
- Although the general functionality and hardware are similar, the differences are related to the proprietary software that powers the hardware
- The foundational work the Tourism Program has been doing would set us up for success if we execute a kiosk strategy



## Outdoor Kiosks



## Indoor & Outdoor Mounted Kiosks



## Indoor Portrait Kiosks



# Showroom



# Digital Directory | Smart Kiosk

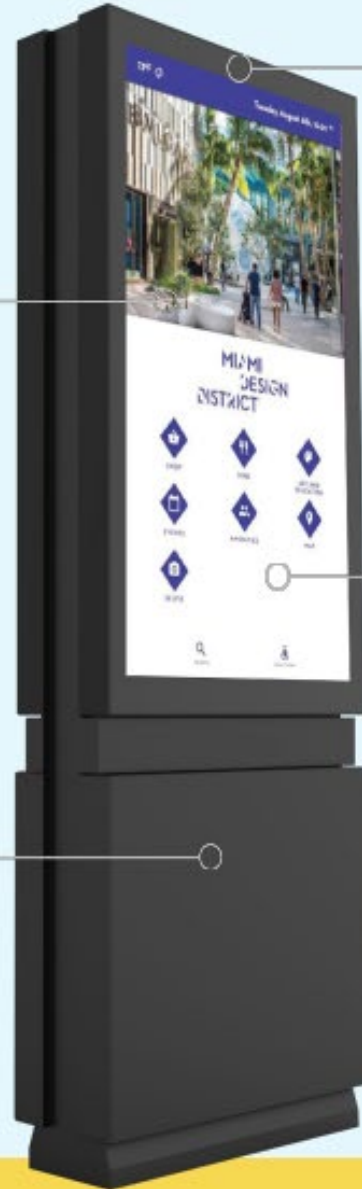
The displays provide 10 years of 24/7 visual performance, guaranteed with ZERO loss in luminance.

## Up to a 10 Year Warranty

- ✓ White glove service
- ✓ Report a problem and we take it from here

## Proactive Health Monitoring

- ✓ Rove iQ monitors and replaces parts as needed. All covered under warranty



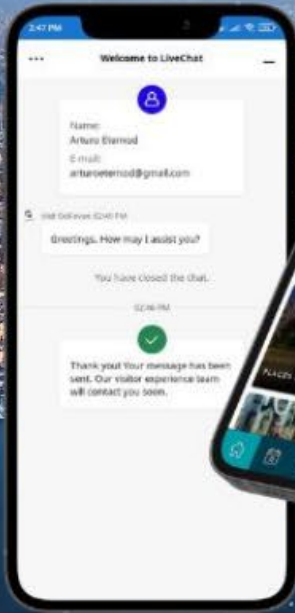
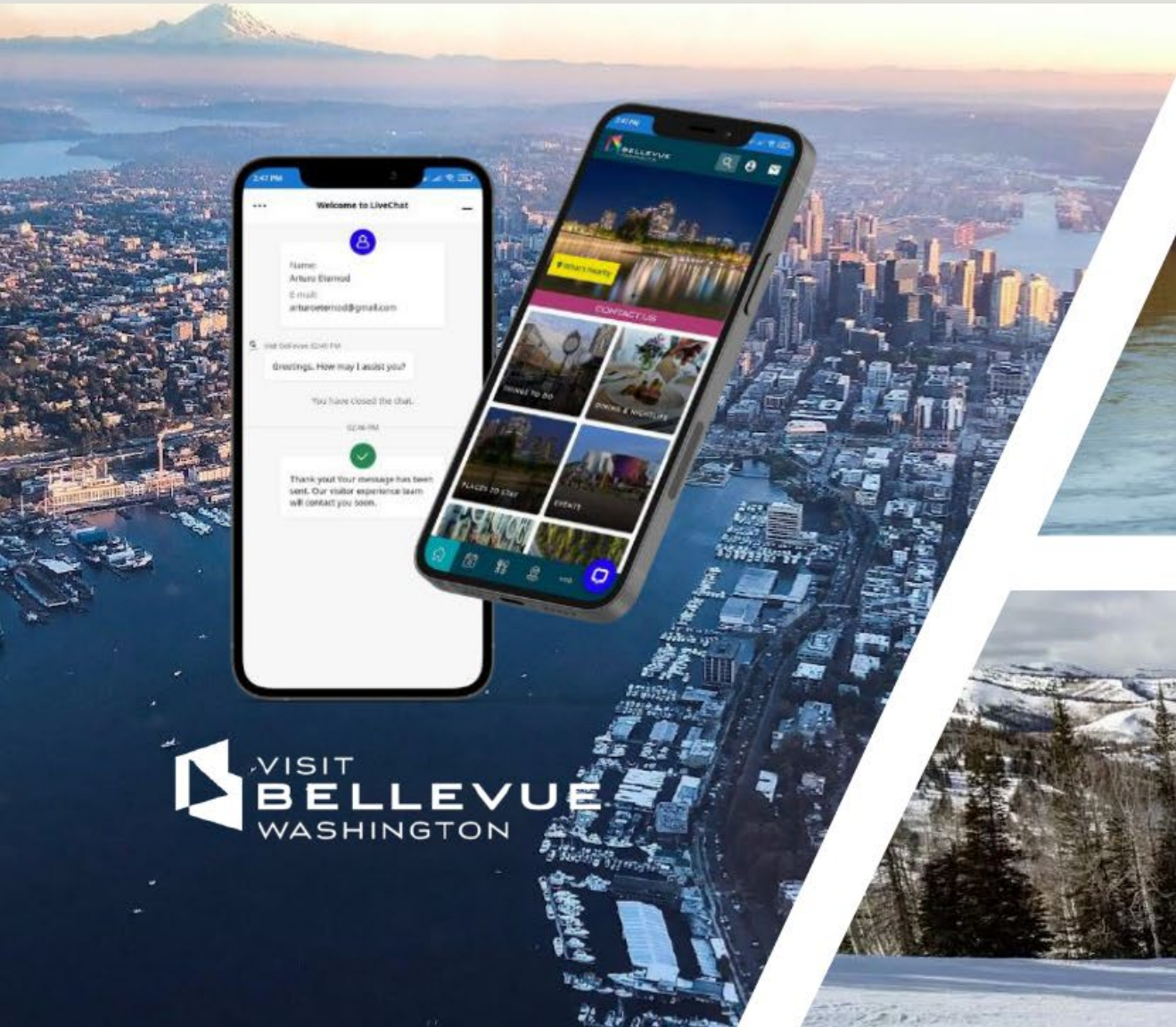
## High Quality Displays

- ✓ 55" – Full HD (1920x1080)
- ✓ 75" – 4K Ultra HD (3840x2160)
- ✓ Polarized sunglass viewable
- ✓ Up to 5,000 nit brightness
- ✓ Anti-reflective Glass
- ✓ Dynamic Viewing based on Weather

## Built For All Weather

- ✓ IP 66 Certified
- ✓ Built for wind load up to 186 mph
- ✓ Operates in temps -40 °F to 122°F

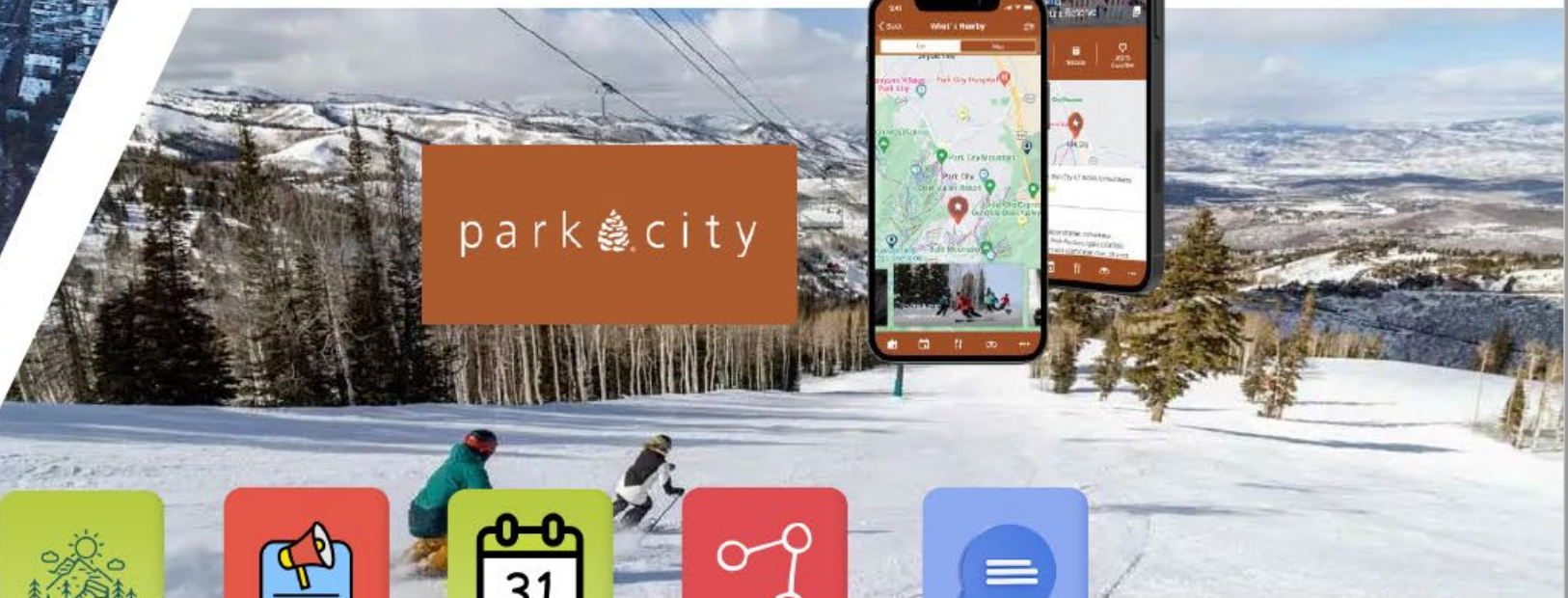




**VISIT BELLEVUE**  
WASHINGTON



**MANITOBA EXPLORER**



**park city**



**PWA**



PASSES



ITINERARY BUILDER



TRAILS



ADVERTISING



EVENTS



SOCIAL MEDIA



CHATBOT

# Transforming Visitor Experiences

In partnership with HootBoard, a leader in visitor information and guest experience for tourism, campuses and spaces.

## Top Visitor Information Platform

## Why HootBoard

## HootBoard Mission

HootBoard is used by multiple Destination Organizations, Cities & Universities across the country.

A leader in visitor information that is easiest to build, manage and update.

To connect people to organizations and spaces so amazing things can happen.

### Key Features of HootBoard



Local BBS



Selfiebooth



Itinerary Builder



Transit App



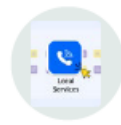
City Guide



Experiences and Tickets



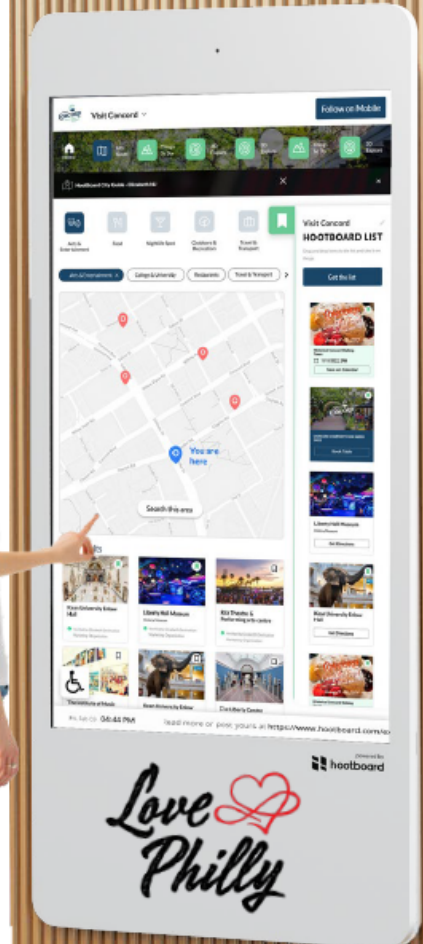
Safety App



Directory



Wayfinding App



Love Philly

powered by hootboard



Public WiFi Access



Charging Ports



Transit Tracking



Virtual Brochure Rack



Customized Selfie App



Public Service Announcements



Local Business Engagement



Comprehensive Public Safety Features



Air Quality Sensors

# TrueOmni **MODULES**

COUPONS



ADVERTISING



TRAILS



CHATBOT



PHOTOBOOTH



ITINERARY  
BUILDER



MAPS



EVENTS



DIGITAL  
BROCHURE



BOOKING



PASSES



VIDEO WALL



PROGRESSIVE  
WEB APP



SURVEYS



SOCIAL MEDIA



GUESTBOOK



# OMNIPLATFORM

## OUR PARTNERS



### CRM/CMS



### E-COMMERCE



### OMNI AD NETWORK



### RESERVATIONS



### TICKETING

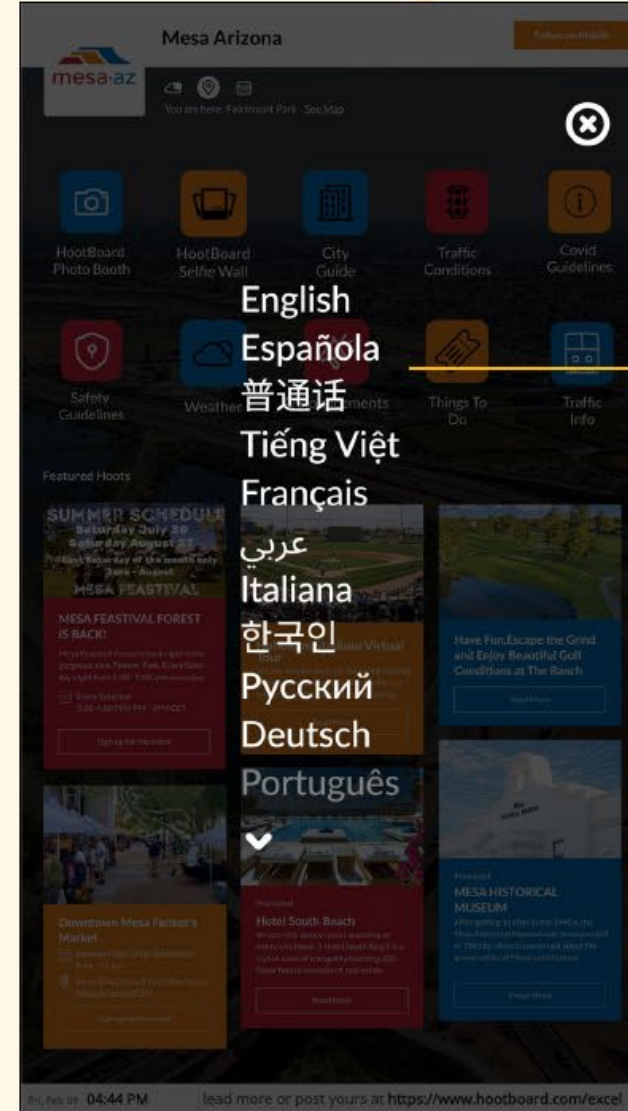
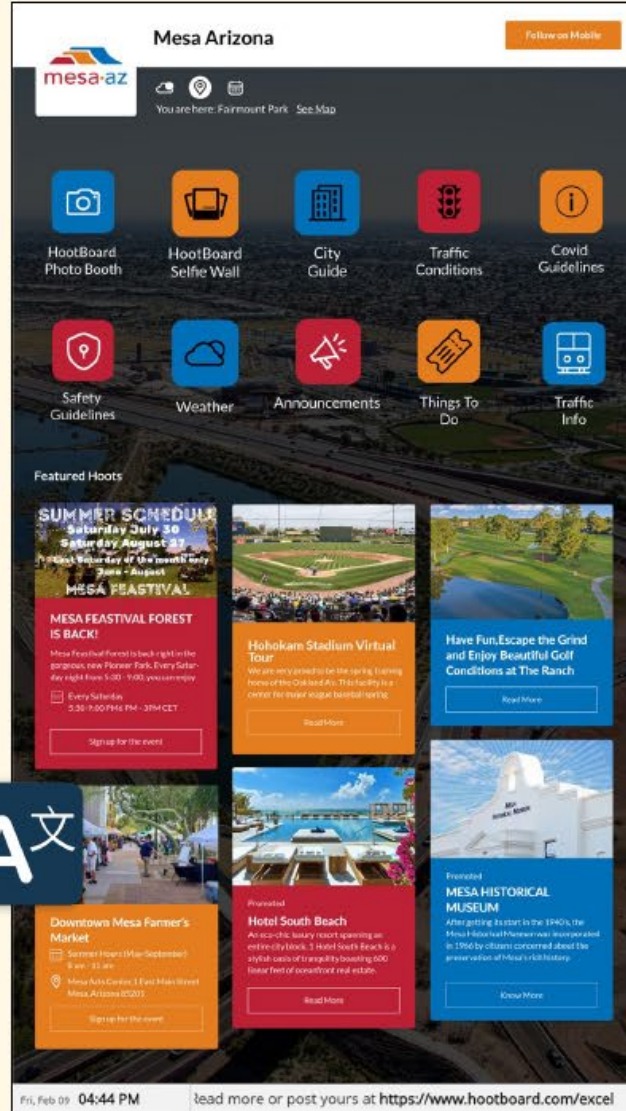


### SOCIAL ENGAGEMENT



# Multilingual

Multi-Language support interface



Users can select a language from the multiple language menu





**Total App Interaction**  
3918

**Members**  
17



**Subscribers**  
317



**Selfies Clicked**  
1,995



**Engagement on Selfies**  
7042



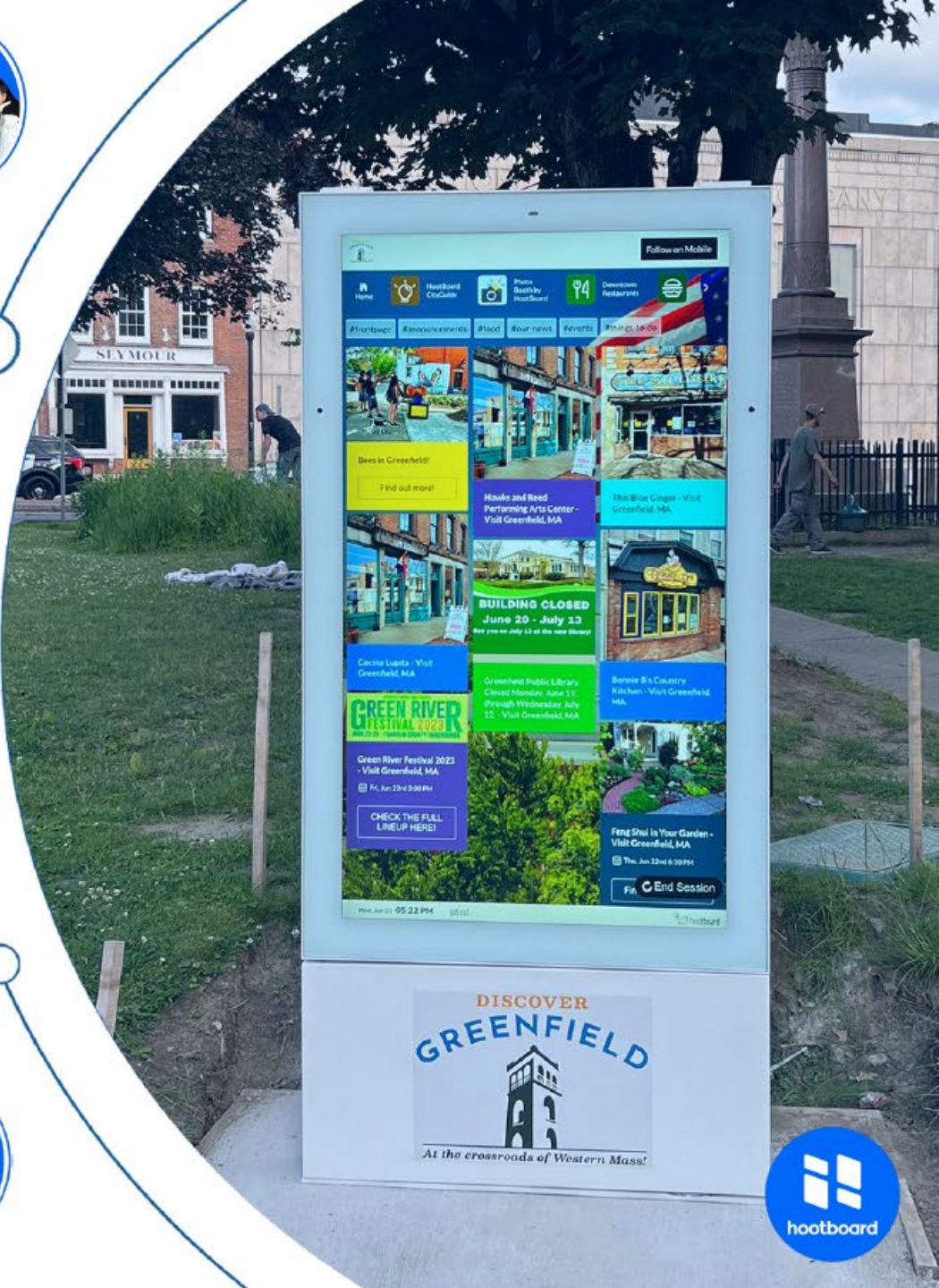
**Local Businesses Discovered**  
1,711



**Over All Interactions**  
26020



\* Past 12 months data



**DISCOVER GREENFIELD**

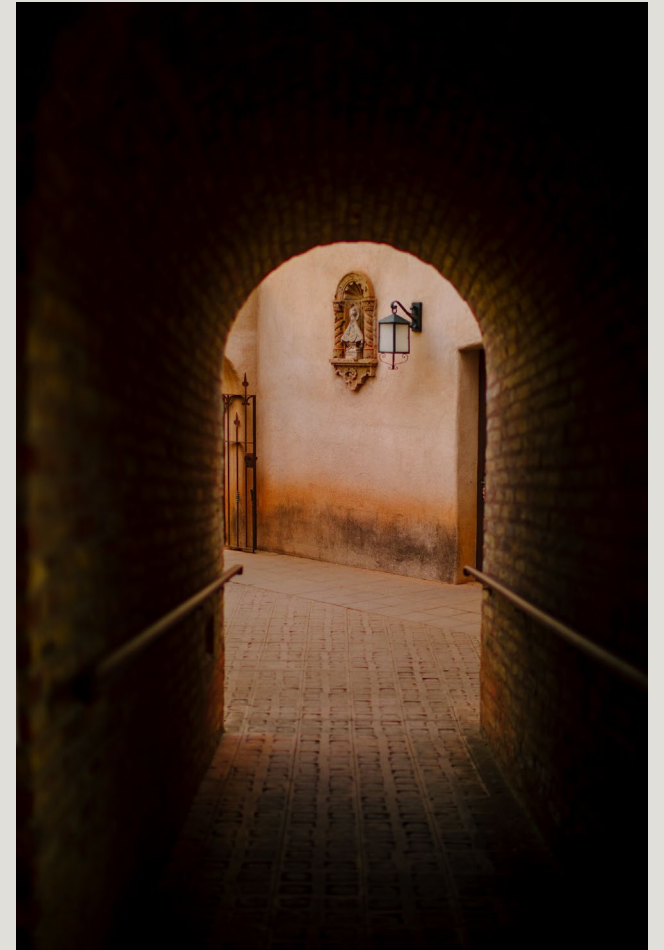


*At the crossroads of Western Mass!*



# Key Takeaways From Provider Discussions

- Destinations with extreme heat require more expensive hardware that has a cooling function
- Standard screen sizes vary from 55 inch to 75 inch
- Hardware warranties vary from 5 to 10 years
- 1-sided or 2-sided screens are available
- Internet access can be hard wired, SIM, or WIFI
- Typical implementation timeline is ~6 months





# Defining Our Kiosk Modules

- Modules are the individual experiences that users can have with each kiosk (i.e. book your stay)
- Modules can be fed from a variety of sources and platforms
- We can select the modules that would be available within our kiosks



## Potential Kiosk Modules

- Book>Direct Hotels

- Purchase a Red Rock Pass

- Book>Direct Tours

- Photo Booth

- Sedona Shuttle

- Map & Directions

- Digital Trail Map

- Digital Brochures

- Places to Eat

- Itinerary Builder

- Artificial Intelligence Bot



# TOURISM PROGRAM

# WIDGET TEST

BOOK YOUR STAY  
IN SEDONA

Check-In



Check-Out



All Lodging



CHECK RATES



NEWSLETTER STEWARDSHIP BLOG

Sedona Visitor Information Center  
331 Forest Road, Sedona, AZ 86336  
(928) 282-7722



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# TOURISM PROGRAM



Search list...

- Recently added
- Activity
- Difficulty
- Length
- Suitability
- More filters

# Discover Trails at Acadia National Park

Donations to America's National Parks™ supports education and preservation at Acadia National Park. Donate today and...

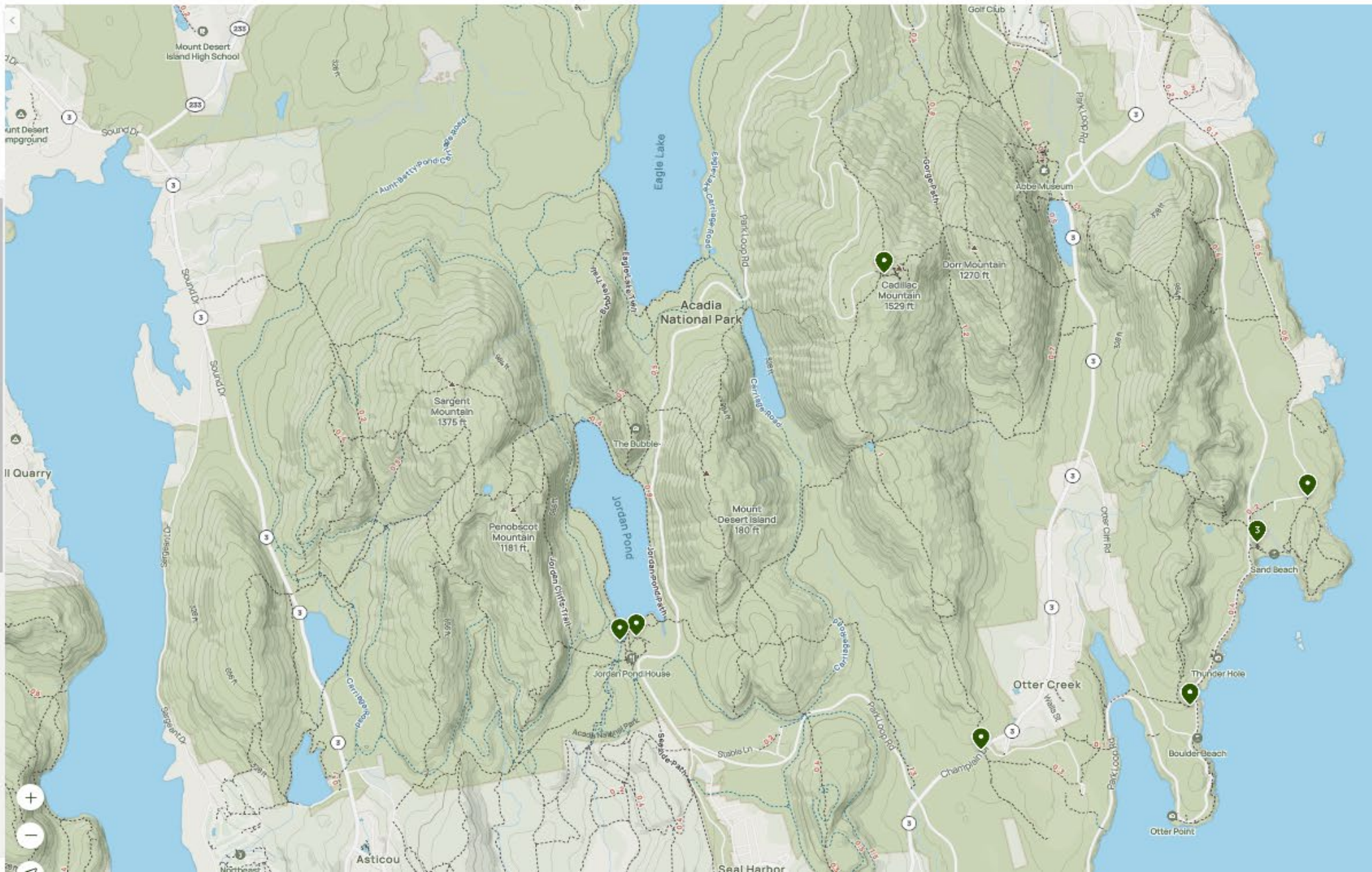
Copy to my lists



**Cadillac Summit Loop Trail**  
Acadia National Park  
★ 4.7 · Easy · 0.5 mi · Est. 12m



**Great Head Trail (Full Loop)**  
Acadia National Park  
★ 4.8 · Moderate · 1.8 mi



## Priority Kiosk Modules

• Book>Direct Hotels	• Purchase a Red Rock Pass
• Book>Direct Tours*	• Photo Booth
• Sedona Shuttle	• Map & Directions
• Digital Trail Map*	• Digital Brochures
• Places to Eat	• Itinerary Builder (?)
• Artificial Intelligence Bot*	• Places to shop (retail & galleries)
• Walking Tours in Town	• Visitor Education/Safety Information
• Emergency Alerts	• Verde Valley Wine Trail
• Historic Sites	• Community Parks & Playgrounds
• Events	• Visitor Survey (?)



# TOURISM PROGRAM

*\*Requires new build*

# Priority Kiosk Locations

- Another question we have is related to where kiosks should be installed within Sedona
- For the initial phase of installation, we are suggesting avoiding mobile executions
- Suggested considerations include entry points into the city, areas with high concentrations of visitors, and access to ground wire and internet connection



# Sedona Kiosk Location Map

9 views

Last edit was yesterday at 4:41 PM

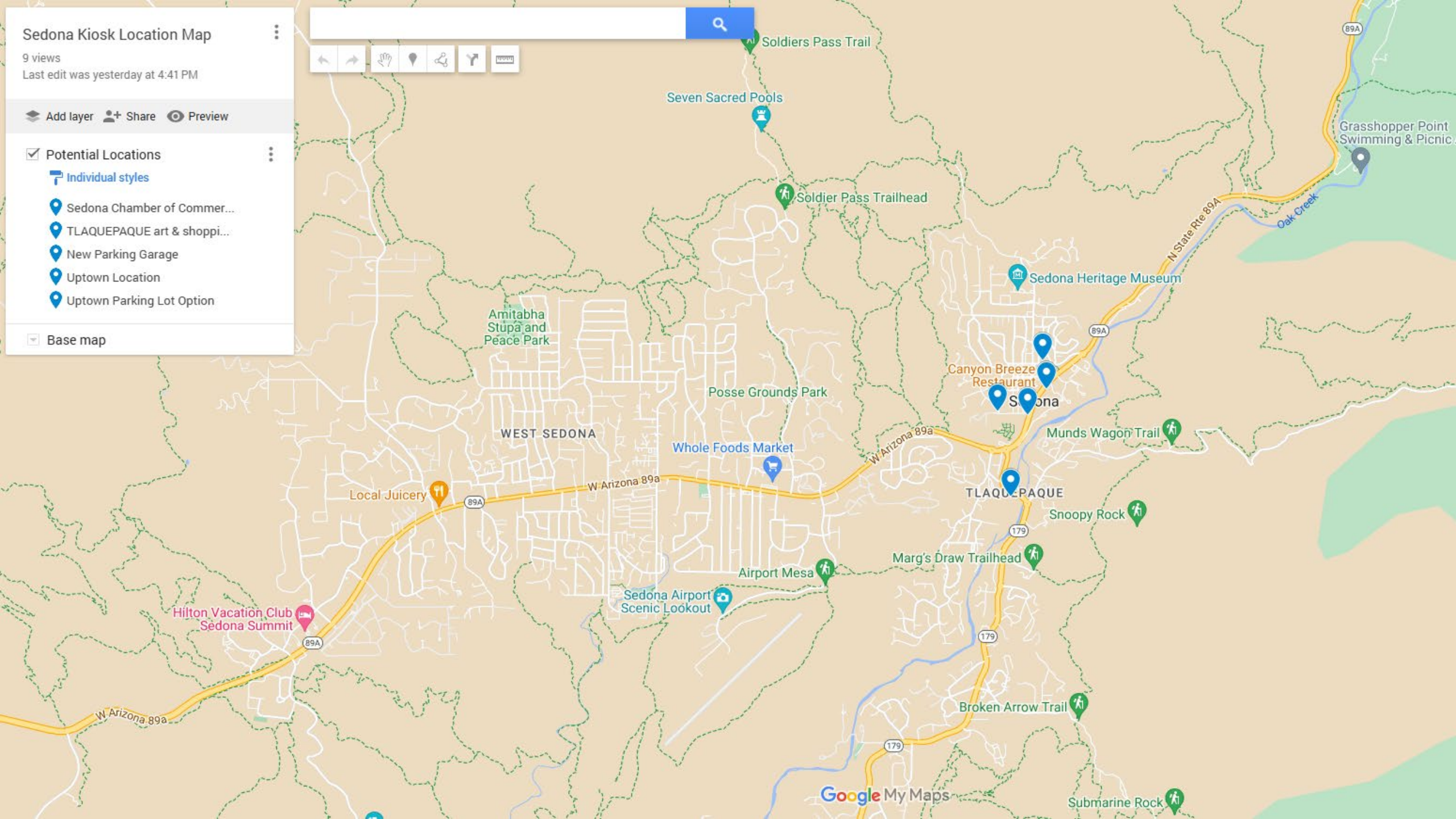
Add layer Share Preview

## Potential Locations

Individual styles

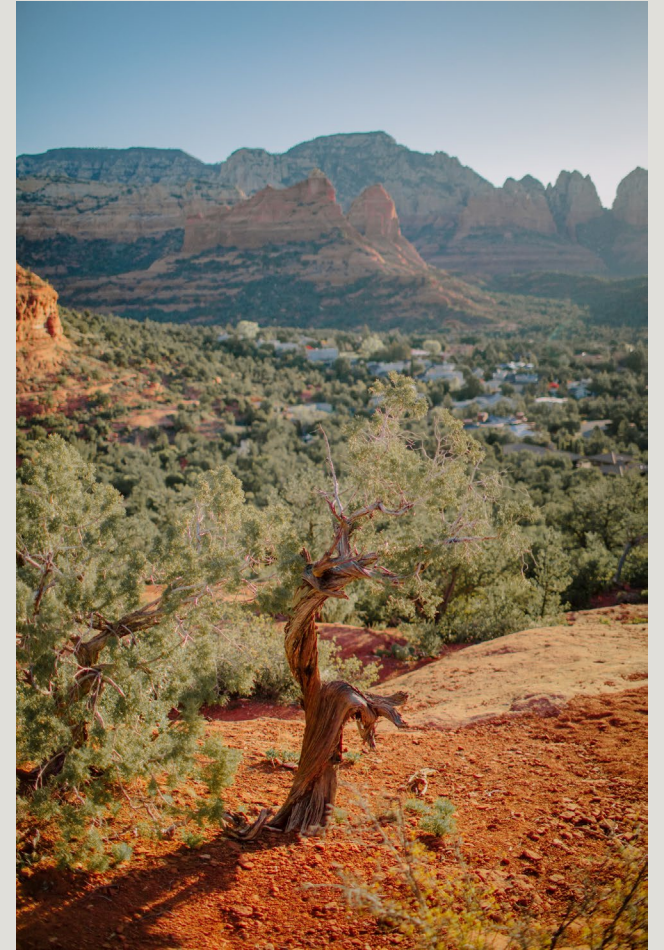
- Sedona Chamber of Commer...
- TLAQUEPAQUE art & shoppi...
- New Parking Garage
- Uptown Location
- Uptown Parking Lot Option

Base map



# Next Steps

- Our team will continue to compile the TAB's input into a draft list of recommendations
  - Please email us to share any additional thoughts you have about Visitor Services before the December meeting
- The draft list of recommendations will be shared at the December TAB meeting for final input
- Our team will submit the recommendation to City Council as part of the FY26 budgeting process



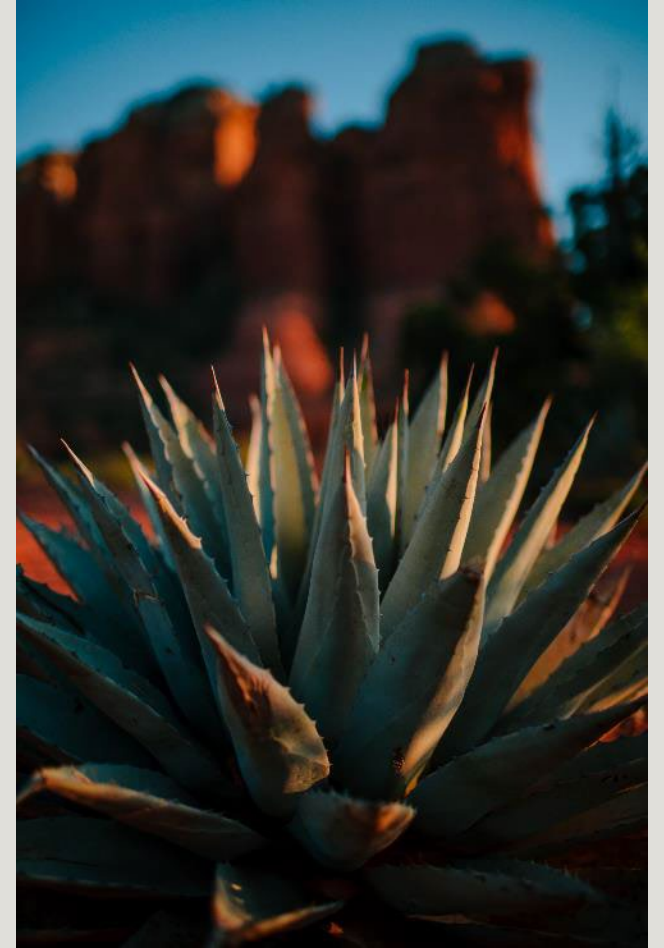


A woman with dark curly hair, wearing a black tank top, light-colored leggings, and a colorful backpack, is hiking away from the camera on a red dirt trail. The trail is surrounded by green trees and shrubs. In the background, there are large, rugged mountains with reddish-brown peaks under a clear blue sky.

# Tourism Marketing & Branding Update

# Update

- City Council will decide to move forward with TAB recommendations on Nov. 12th:
  - The tagline: Stay Inspired
  - The logo
  - The marketing campaign: Redefine Desert



# Logo and Tagline

**SEDONA**  
stay inspired

**SEDONA**  
redefine desert



**TOURISM PROGRAM**

# Color Palette



Toroweap  
Sandstone



Sedona Red



Juniper Ochre



Succulent Green



Sunrise Terracotta

# TOURISM PROGRAM



# Color Palette with Logos



**TOURISM PROGRAM**





# Monthly Summary Report

## September 2024

# Monthly Historical Lodging

September 2024 | Sedona



## Hotel Performance

Source: STR (Sedona+)

	Occupancy	ADR	RevPAR	Revenue
Sep 2024	67.5%	\$357.62	\$241.22	\$15.6M
YOY % Change	+2.8% YOY	-0.6% YOY	+2.1% YOY	+2.1% YOY
Calendar Year-to-Date	68.0%	\$337.16	\$229.27	\$135.2M
YTD YOY % Change	+3.8% YOY	+2.8% YOY	+6.7% YOY	+7.1% YOY

## Short Term Vacation Rental Performance - Direct

Source: KeyData (Vacation Area - City of Sedona)

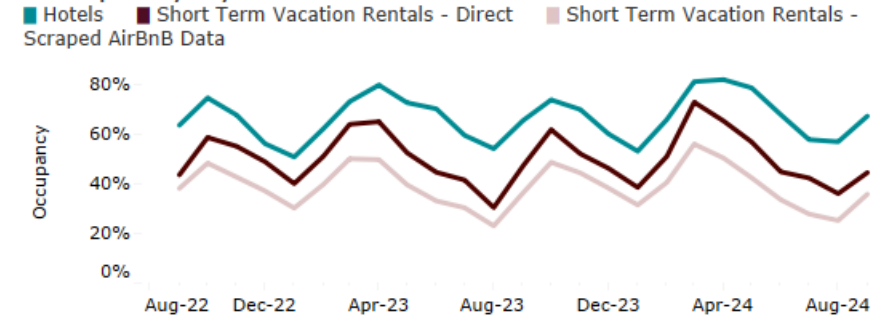
	Occupancy	ADR	RevPAR	Revenue
Sep 2024	44.6%	\$340.52	\$151.97	\$1.3M
YOY % Change	-5.6% YOY	-3.1% YOY	-8.5% YOY	-0.2% YOY
Calendar Year-to-Date	50.3%	\$358.57	\$180.27	\$13.1M
YTD YOY % Change	+3.4% YOY	-1.5% YOY	+1.9% YOY	+5.3% YOY

## Short Term Vacation Rental Performance - Scraped AirBnB Data

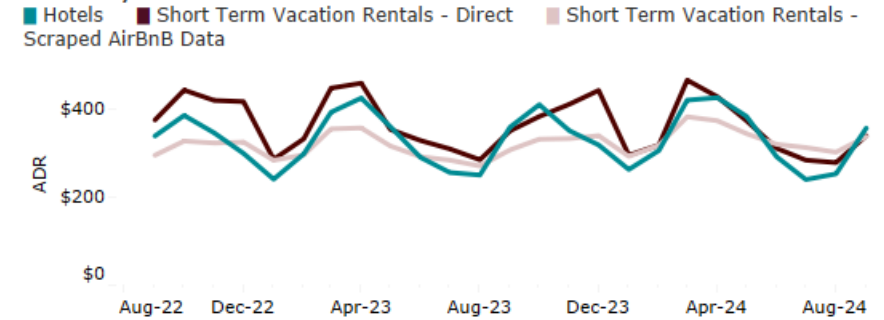
Source: KeyData (Vacation Area - City of Sedona)

	Occupancy	ADR	RevPAR	Revenue
Sep 2024	35.9%	\$338.38	\$121.54	\$8.0M
YOY % Change	-1.2% YOY	+9.8% YOY	+8.5% YOY	+25.4% YOY
Calendar Year-to-Date	38.1%	\$339.18	\$129.35	\$76.6M
YTD YOY % Change	+3.6% YOY	+8.0% YOY	+11.8% YOY	+35.8% YOY

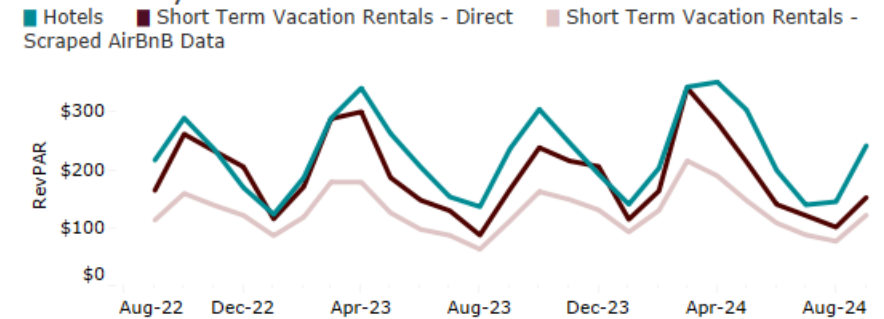
## Occupancy by Month



## ADR by Month



## RevPAR by Month





## Sedona+ Hotel Performance

Calendar Year-to-Date Performance  
compared to last year

Occupancy	ADR	RevPAR	Supply	Demand	Revenue
<b>68.0%</b>	<b>\$337</b>	<b>\$229</b>	<b>589.5K</b>	<b>400.9K</b>	<b>\$135.2M</b>
+3.8%	+2.8%	+6.7%	+0.3%	+4.2%	+7.1%

### Monthly Performance

	OCC	% CHG	ADR	% CHG	RevPAR	% CHG
Jul	58.0%	-2.9%	\$241	-6.3%	\$139	-9.0%
Aug	57.1%	+5.2%	\$254	+1.1%	\$145	+6.3%
Sep	67.5%	+2.8%	\$358	-0.6%	\$241	+2.1%

## Village of Oak Creek+ Hotel Performance

Calendar Year-to-Date Performance  
compared to last year

Occupancy	ADR	RevPAR	Supply	Demand	Revenue
<b>63.6%</b>	<b>\$202</b>	<b>\$129</b>	<b>212.4K</b>	<b>135.1K</b>	<b>\$27.3M</b>
-3.0%	-4.4%	-7.3%	-0.1%	-3.1%	-7.4%

### Monthly Performance

	OCC	% CHG	ADR	% CHG	RevPAR	% CHG
Jul	61.8%	-4.7%	\$162	-10.6%	\$100	-14.8%
Aug	55.6%	+4.3%	\$157	-6.8%	\$87	-2.7%
Sep	64.4%	-3.0%	\$198	-5.8%	\$128	-8.6%



# Hotel 4 Month Outlook

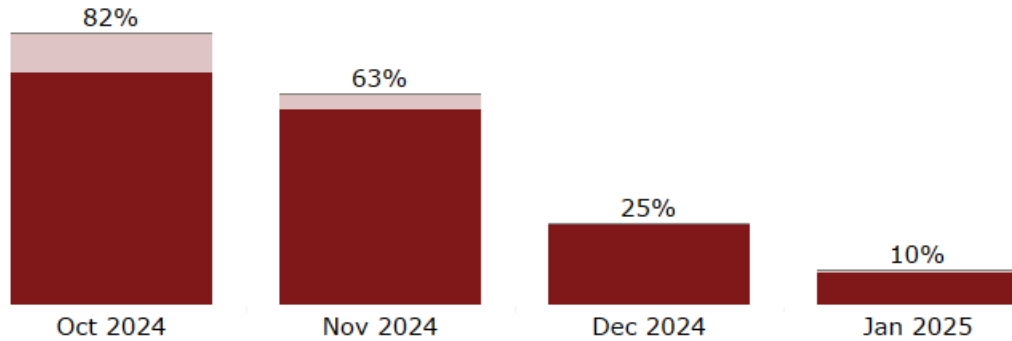
Data for zip code 86336



## Occupancy as of 10/30/2024

### Current Occupancy

■ Other   ■ Group   ■ Transient



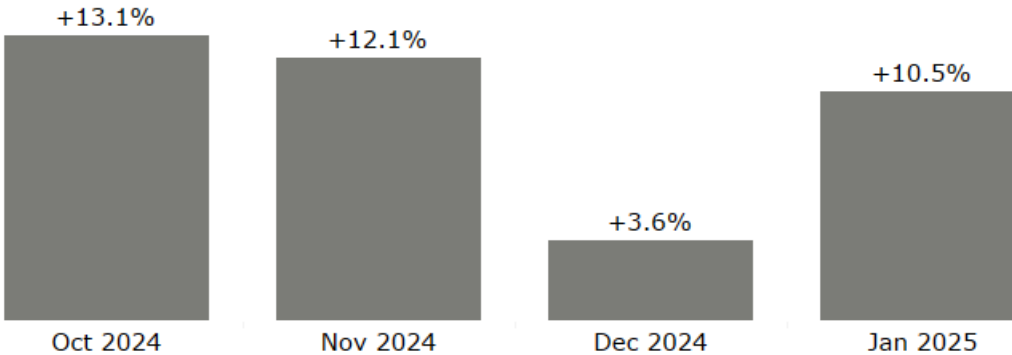
## Bookings by Segment

	Oct 2024	Nov 2024	Dec 2024	Jan 2025
Transient	19.8K	16.1K	6.9K	2.8K
Group	3.5K	1.3K	106	154
Other	15	50	14	3
<b>Total</b>	<b>23.3K</b>	<b>17.4K</b>	<b>7.0K</b>	<b>2.9K</b>

**Rooms Booked**

### Booking Pace

Total Rooms Booked vs. Same-Time-Last-Year



**YOY % Change**

	Oct 2024	Nov 2024	Dec 2024	Jan 2025
Transient	+13.2%	+14.9%	+13.7%	+15.8%
Group	+20.5%	-8.6%	-79.9%	-31.6%
Other	-93.2%	-65.8%	-92.1%	-90.6%
<b>Total</b>	<b>+13.1%</b>	<b>+12.1%</b>	<b>+3.6%</b>	<b>+10.5%</b>

# Short Term Rental Review Direct Source

September 2024



## City of Sedona Performance

Calendar Year-to-Date Performance  
compared to last year

Occupancy	ADR	RevPAR
<b>50.3%</b>	<b>\$359</b>	<b>\$180</b>
+3.4%	-1.5%	+1.9%

### Monthly Performance

	OCC	% CHG	ADR	% CHG	RevPAR	% CHG
Jul	42.5%	+1.9%	\$285	-8.3%	\$121	-6.5%
Aug	36.1%	+18.4%	\$279	-2.2%	\$101	+15.7%
Sep	44.6%	-5.6%	\$341	-3.1%	\$152	-8.5%

## Greater Sedona Performance

Calendar Year-to-Date Performance  
compared to last year

Occupancy	ADR	RevPAR
<b>50.5%</b>	<b>\$319</b>	<b>\$161</b>
+3.6%	-2.8%	+0.7%

### Monthly Performance

	OCC	% CHG	ADR	% CHG	RevPAR	% CHG
Jul	41.8%	+2.9%	\$258	-9.8%	\$108	-7.2%
Aug	36.0%	+16.1%	\$256	-2.3%	\$92	+13.4%
Sep	43.8%	-7.5%	\$300	-6.1%	\$131	-13.1%

## Village of Oak Creek Performance

Calendar Year-to-Date Performance  
compared to last year

Occupancy	ADR	RevPAR
<b>52.6%</b>	<b>\$207</b>	<b>\$109</b>
+4.5%	-4.9%	-0.6%

### Monthly Performance

	OCC	% CHG	ADR	% CHG	RevPAR	% CHG
Jul	42.4%	+4.5%	\$169	-14.4%	\$72	-10.6%
Aug	36.8%	+11.1%	\$163	-6.1%	\$60	+4.3%
Sep	42.3%	-12.8%	\$188	-3.6%	\$80	-15.9%

Note: Occupancy is not reflective of overall changes in short term rental demand  
Source: KeyData (Direct Source methodology = directly submitted by property managers)

# Short Term Rental Review OTA AirBNB

September 2024



## City of Sedona Performance

Calendar Year-to-Date Performance  
compared to last year

Occupancy	ADR	RevPAR
<b>38.1%</b>	<b>\$339</b>	<b>\$129</b>
+3.6%	+8.0%	+11.8%

### Monthly Performance

	OCC	% CHG	ADR	% CHG	RevPAR	% CHG
Jul	27.9%	-8.4%	\$313	+10.1%	\$87	+0.8%
Aug	25.3%	+9.4%	\$303	+11.6%	\$77	+22.1%
Sep	35.9%	-1.2%	\$338	+9.8%	\$122	+8.5%

## Greater Sedona Performance

Calendar Year-to-Date Performance  
compared to last year

Occupancy	ADR	RevPAR
<b>37.4%</b>	<b>\$318</b>	<b>\$119</b>
+3.3%	+8.2%	+11.8%

### Monthly Performance

	OCC	% CHG	ADR	% CHG	RevPAR	% CHG
Jul	28.0%	-6.5%	\$299	+10.5%	\$84	+3.3%
Aug	25.1%	+7.8%	\$293	+15.5%	\$73	+24.5%
Sep	35.4%	-1.7%	\$320	+10.6%	\$113	+8.7%

## Village of Oak Creek Performance

Calendar Year-to-Date Performance  
compared to last year

Occupancy	ADR	RevPAR
<b>34.6%</b>	<b>\$257</b>	<b>\$89</b>
+3.8%	+7.6%	+11.7%

### Monthly Performance

	OCC	% CHG	ADR	% CHG	RevPAR	% CHG
Jul	26.5%	-6.6%	\$257	+12.8%	\$68	+5.4%
Aug	23.6%	+4.4%	\$251	+24.8%	\$59	+30.3%
Sep	33.8%	-1.4%	\$265	+12.3%	\$90	+10.7%

Note: Occupancy is not reflective of overall changes in short term rental demand  
Source: KeyData (OTA AirBNB)

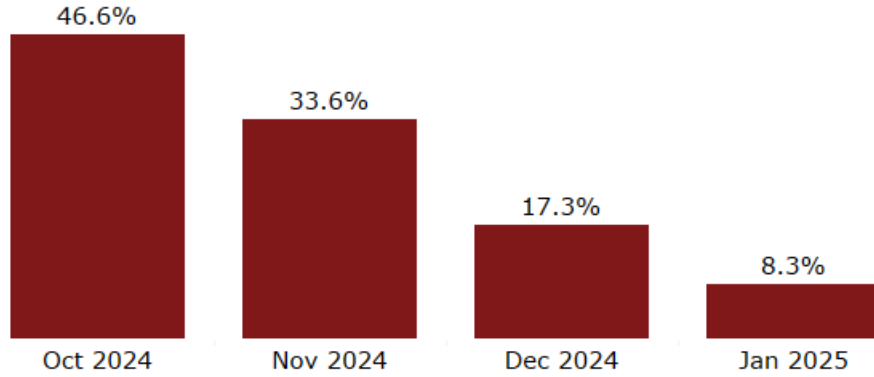
# Short Term Lodging 4 Month Outlook

Vacation Area - City of Sedona



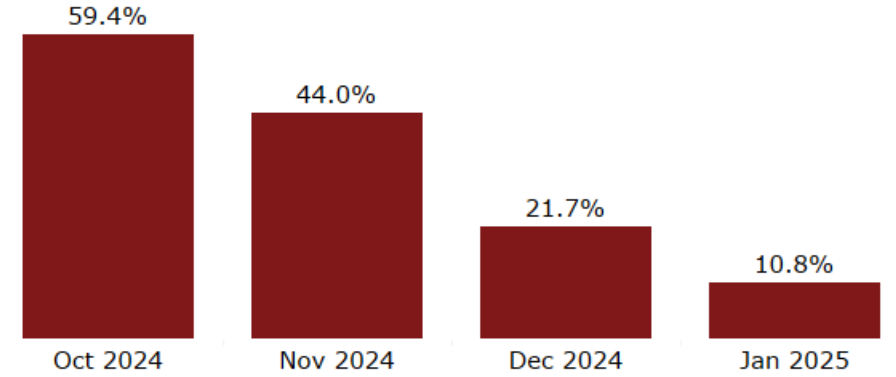
## OTA AirBNB

### Occupancy Outlook

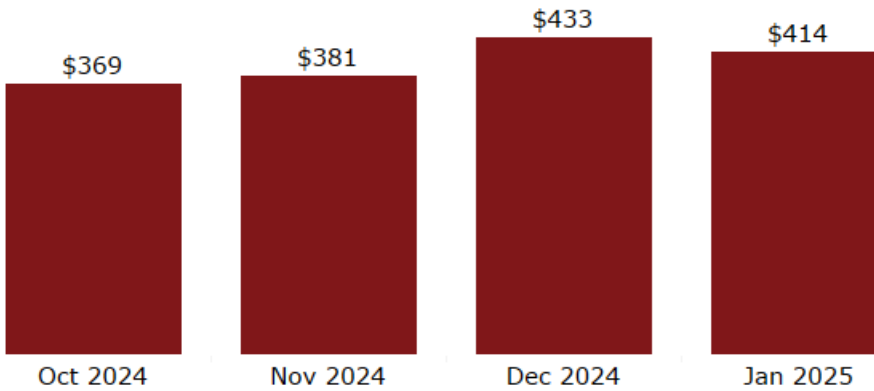


## Direct PRO

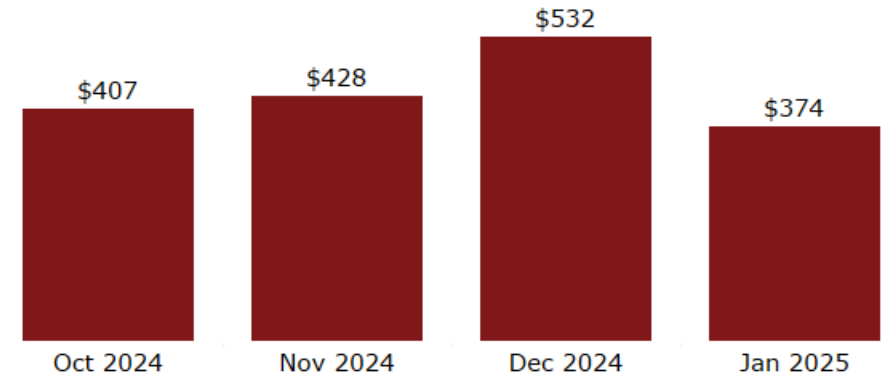
### Occupancy Outlook



### ADR Outlook



### ADR Outlook



# Visitor Spending

September 2024



## Visitor Credit Card Spending

September 2024 Card Spend

**\$7.3M**

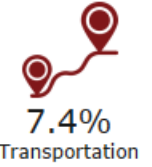
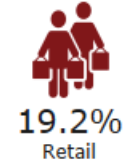
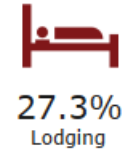
+1.7% YOY

Jan - Sep 2024 Card Spend

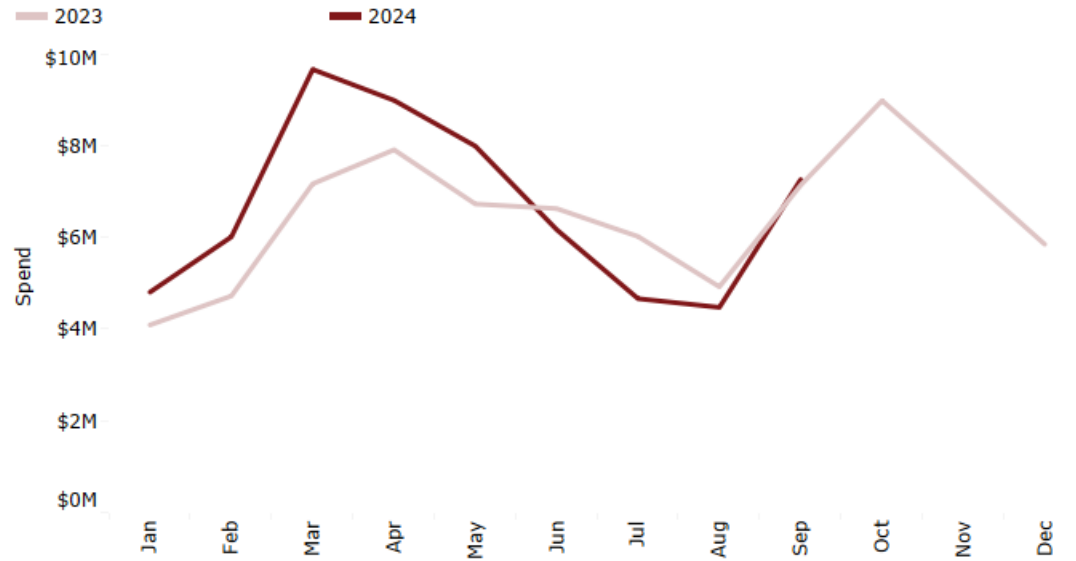
**\$60.0M**

+8.5% YOY

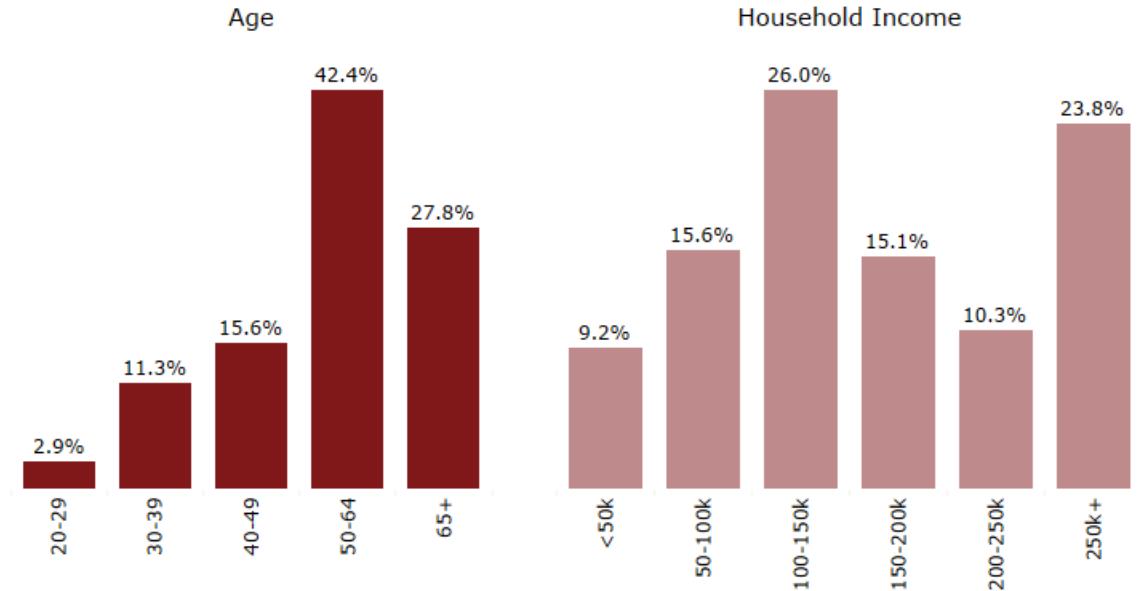
## September 2024 Visitor Credit Card Spending



### Visitor Spending Trend



### Spending by Demographic





# Sample Size Information



KeyData Direct Source Data (PRO)	City of Sedona includes ~350 units managed by ~35 property managers within City Limits
	Village of Oak Creek includes ~150 units managed by ~15 property managers
	Greater Sedona includes ~550 units managed by ~40 property managers
KeyData Scraped Data (OTA)	City of Sedona includes ~2,300 Airbnb listings
	Village of Oak Creek includes ~850 Airbnb listings
	Greater Sedona includes ~3,400 Airbnb listings
Smith Travel Research (STR)	Sedona+ includes reporting from 19 of the 43 (44%) of available hotels within the study area that represent 1,726 of the 2,161 (80%) available hotel rooms within the study area.
	Village of Oak Creek+ includes reporting from 5 of the 14 (36%) of available hotels within the study area that represent 511 of the 775 (66%) of available hotel rooms within the study area.
TravelClick	Includes 9 properties with 918 hotel rooms within the 86336 zip code

**THANK YOU**

