

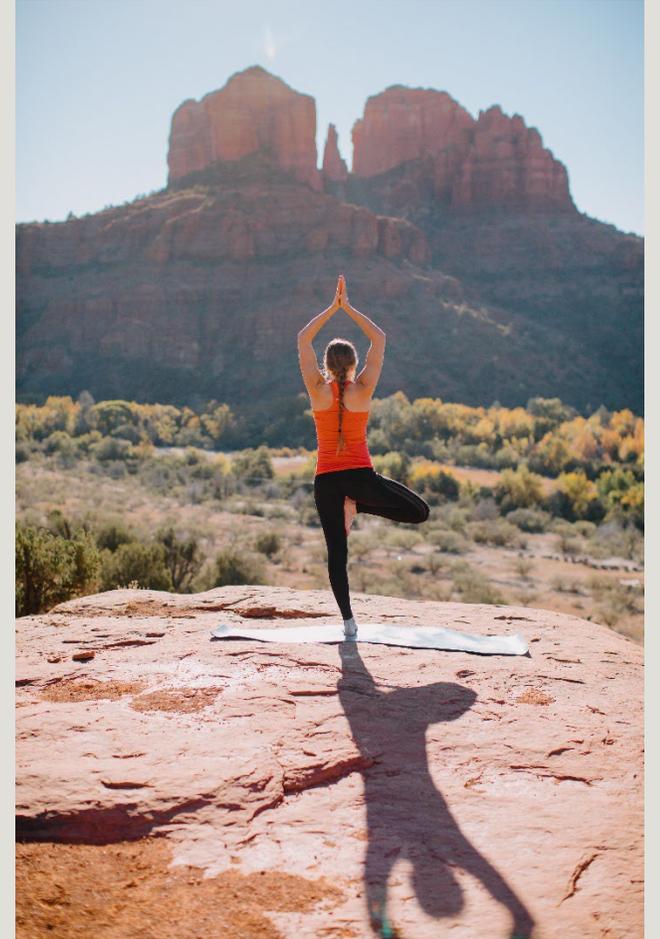


CITY OF SEDONA **TOURISM PROGRAM**

Lodging Council Meeting
February 11, 2025

Agenda Items

- FAM and Media updates
- Winter campaign update
- State of Sedona Tourism Research



FAM Updates

- January
 - Mauri Elbel, *Austin Travels Magazine*
 - Cali'Fun, *French travel agent*
 - TourMappers, *U.S. travel agent*
 - MW Millwork, *Meeting planner*
 - Alex Caspero, *MSN journalist*
 - CANUSA, *German travel agent*
 - Free Spirit Vacations, *U.S. tour operator*
 - Lexy Troth, *content creator*
 - Amara Resort & Spa Press FAM, *8 media*
 - AOT French FAM, *6 French travel agents*
 - Jim Bamboulis, *Canadian journalist*
- February - September
 - Jay Gentile, *Frommer's*
 - Brand USA FAM, *10 Oceania travel agents*
 - TravelCon Pre-Fam, *5 content creators*
 - ADAC Reisen, *German travel agent*
 - Travel Counsellors, *U.K. travel agent*
 - Comptoir de Voyages', *French travel agent*



RED ROCK HIKES, STAR-STUDED NIGHTS AND ENDLESS ADVENTURES IN SEDONA, ARIZONA



Travelers come from around the world to stargaze in Sedona, and Sedona Stargazing Tours offers tours nightly. Credit Sedona Stargazing Tours LLC.

Stargazing

The desert town of Sedona is known as one of the best places in the world for stargazing. A designated



Here's Why Sedona Should Be Your Next Girls' Trip Destination

©Provided by: Planner at Heart

Sedona, Arizona, with its vibrant red rocks, mystical energy vortexes, and luxurious accommodations, provides the perfect backdrop for an unforgettable girls' weekend. To celebrate our 40th birthdays this year, my college best friends and I embarked on an epic girls' weekend in Sedona, Arizona, last month. We craved adventure, relaxation, and a touch of spiritual rejuvenation, and Sedona exceeded all expectations.

Escape the winter blues and embrace the natural beauty of the red rocks; here are 11 reasons Sedona should be your girls' trip destination.



Rise & Shine Yoga on the Vortex

©Courtesy City of Sedona.

Kickstart your day with an unforgettable outdoor yoga experience. [Aumbase Sedona](#) offers a "Rise and Shine Yoga on the Vortex" class daily on the powerful Airport Mesa Vortex.

Our experienced instructor, [Liliana Salas](#), led us on a beautiful Vinyasa yoga flow on the mountainside, with modifications



Find Your Adventure with Mountain Biking

©Courtesy Alexandra Caspero.

Mountain biking in Sedona wasn't initially on my radar. Frankly, my last outdoor bike ride was years ago. But, in the spirit of "YOLO" and the adventurous vibe of Sedona, we decided to give it a try.

[Thunder Mountain Bikes](#) set us up with properly sized bikes, helmets, and a trail map tailored to our (admittedly limited) experience. As a locally and independently owned bike shop, they went above and beyond to ensure that our experience was tailored to what we were looking for. As [Courtney Bechtel](#), owner of [Pex Supply Co.](#), put it, "There was something so fun about overcoming the challenge of mountain biking. I felt like an imposter going in—am I really going to mountain bike?—but seeing how doable and enjoyable it was, riding bikes was a highlight of my weekend."



CRAI BOWER
G&G CONTRIBUTOR

I Just Got Back from...

Sedona, Arizona. I'm a lover of landscapes, and the sandstone spires and landforms of Sedona, a ceremonial destination for the *Anasazi* ("ancient ones" in Navajo), engender in me a giddy state of being. Or perhaps my glee came from the fabled red rock vortexes, distinct spots where energy spirals outward from the earth to cast positive vibes all around.

- **Slowing down.** We centered our stay beneath the shadow of Kachina Woman, an eighty-foot natural tower, at Enchantment Resort. Located deep in Boynton Canyon and surrounded by Coconino National Forest, Enchantment is a "toss your keys" accommodation. Why would you ever depart the vicinity after landing in your casita? Contemplate your steps on the soft, rust-colored trails, let your heartbeat echo against the raven's croak, and observe how the setting sun alights on Kachina Woman.
- **Revving up.** Outdoor adventure centers are springing up like Blackfoot daisies across luxury resorts, thrilling those of us who'd rather pedal our way through a canyon than paddle our way 'round the pool. Enchantment's Trail House offers guided Grand Canyon hikes, trail running clinics, and rock-climbing expeditions, among other options. We booked a photography workshop and sped off to Cathedral Rock to capture the monolith framed by gilded cottonwood leaves at sunset. My favorite shot captured the crepuscular rays shooting up from the mesa—like on the Arizona state flag. The next morning we returned to Trail House, consulted with an Adventure Advisor, and set off on a self-guided Boynton Canyon hike.
- **Putting into the vortex.** My golf game perpetually needs a mental reset. Thus I linked my Sedona Golf Resort and Oakcreek C.C. rounds with an educational hike on the Airport Mesa Vortex. After several calming meditations, Pete Sanders, my vortex energy guide and a weekly lecturer about town, advised me to "focus on feeling like you're on level ground with a standard swing." Words to drive by.



Chronique | Le Bourlingueur

Louer son premier VR pour explorer l'Arizona

Par Jonathan Custeau, La Tribune

12 janvier 2025 à 04h00 | Mis à jour le 12 janvier 2025 à 09h21



Avec un véhicule motorisé loué, on peut bâtir un itinéraire qui nous fait traverser un ou plusieurs États. En partant de l'Arizona, il est facile d'atteindre le Nevada ou, comme sur la photo, la frontière de l'Utah. (Jonathan Custeau/La Tribune)

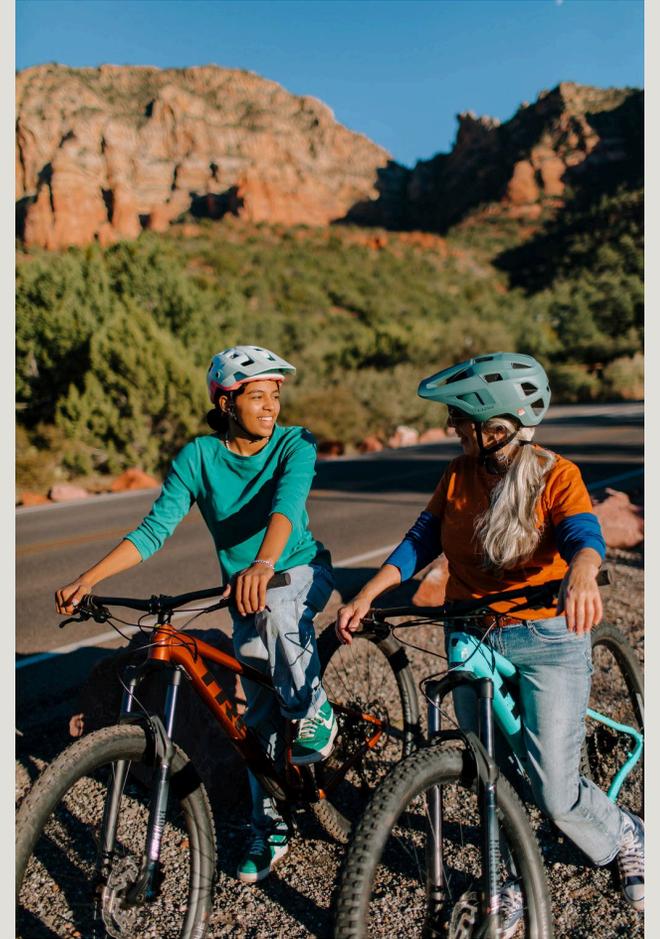
CHRONIQUE / L'idée ne m'avait jamais effleuré l'esprit: louer un véhicule récréatif (VR) pour expérimenter la vie de caravanier sans devenir nomade à temps plein. Pourtant, quand la proposition de découvrir l'Arizona par la route est tombée, le concept m'est apparu logique: goûter à un mode de vie, calmer certaines appréhensions peut-être, au risque de l'adopter.



Winter Campaign Update

Context

- Our winter campaign launched in late November
- Campaign flight runs through the end of February
- We will be able to report on the results 2 months later



Initial Market Performance

Market	Visits	Hotel Visits	ROI
Phoenix	927	329	\$287 : \$1
Los Angeles	151	56	\$36 : \$1
Tucson	111	38	\$167 : \$1
Denver	35	12	\$91 : \$1
Las Vegas	63	26	\$51 : \$1
San Diego	46	16	\$34 : \$1
Chicago	38	9	\$8 : \$1
San Francisco	24	7	\$6 : \$1
Seattle	26	8	\$2 : \$1
New York	26	9	\$1.8 : \$1
Minneapolis-St. Paul	18	4	\$1.8 : \$1



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Top Performing Creatives



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Monthly Summary Report

December 2024

Monthly Historical Lodging

December 2024 | Sedona



Hotel Performance

Source: STR (Sedona+)

	Occupancy	ADR	RevPAR	Revenue
Dec 2024	58.2%	\$326.10	\$189.90	\$13.8M
YOY % Change	-4.4% YOY	+4.4% YOY	-0.3% YOY	-0.3% YOY
Calendar Year-to-Date	68.3%	\$340.88	\$232.81	\$198.5M
YTD YOY % Change	+3.3% YOY	+2.0% YOY	+5.3% YOY	+5.5% YOY

Short Term Vacation Rental Performance - Direct

Source: KeyData (Vacation Area - City of Sedona)

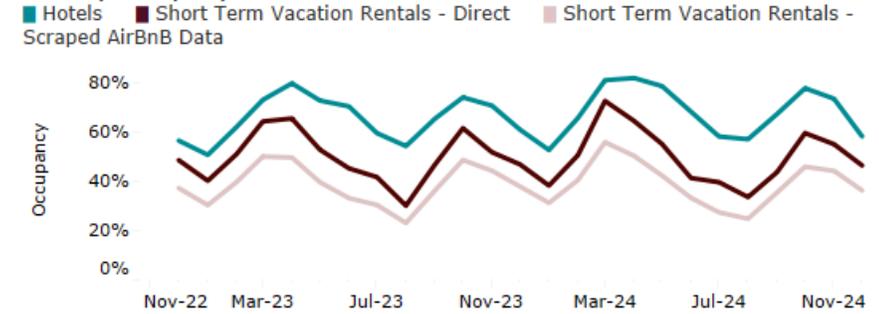
	Occupancy	ADR	RevPAR	Revenue
Dec 2024	46.4%	\$458.57	\$212.92	\$2.1M
YOY % Change	-0.9% YOY	+0.9% YOY	+0.0% YOY	+12.1% YOY
Calendar Year-to-Date	50.0%	\$400.41	\$200.07	\$21.7M
YTD YOY % Change	+0.2% YOY	+2.7% YOY	+2.9% YOY	+9.8% YOY

Short Term Vacation Rental Performance - Scraped AirBnB Data

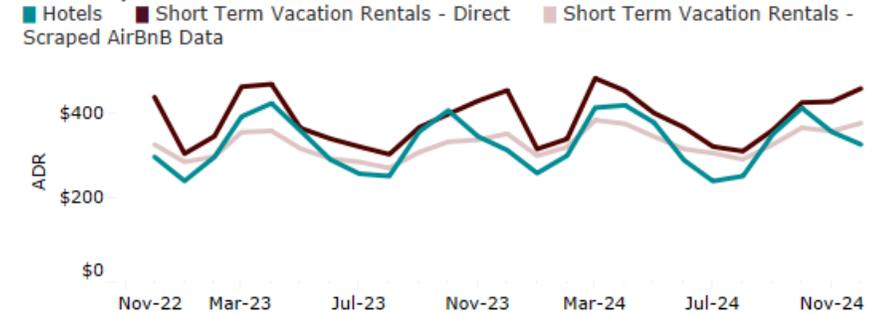
Source: KeyData (Vacation Area - City of Sedona)

	Occupancy	ADR	RevPAR	Revenue
Dec 2024	36.3%	\$376.46	\$136.61	\$9.2M
YOY % Change	-4.2% YOY	+7.1% YOY	+2.6% YOY	+13.5% YOY
Calendar Year-to-Date	38.9%	\$344.65	\$134.00	\$106.1M
YTD YOY % Change	+0.8% YOY	+7.2% YOY	+8.1% YOY	+28.2% YOY

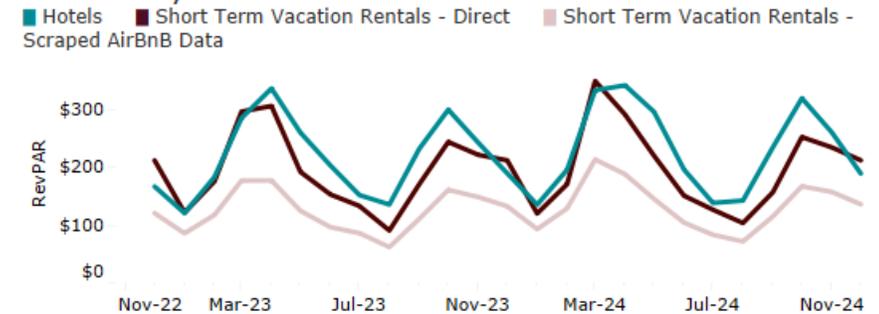
Occupancy by Month



ADR by Month



RevPAR by Month





Sedona+ Hotel Performance

Calendar Year-to-Date Performance
compared to last year

Occupancy	ADR	RevPAR	Supply	Demand	Revenue
68.3%	\$341	\$233	852.6K	582.3K	\$198.5M
+3.3%	+2.0%	+5.3%	+0.2%	+3.5%	+5.5%

Monthly Performance

	OCC	% CHG	ADR	% CHG	RevPAR	% CHG
Oct	77.7%	+5.0%	\$413	+1.5%	\$321	+6.6%
Nov	73.5%	+3.9%	\$356	+3.2%	\$261	+7.3%
Dec	58.2%	-4.4%	\$326	+4.4%	\$190	-0.3%

Village of Oak Creek+ Hotel Performance

Calendar Year-to-Date Performance
compared to last year

Occupancy	ADR	RevPAR	Supply	Demand	Revenue
64.0%	\$206	\$132	280.3K	179.5K	\$37.0M
-2.8%	-4.5%	-7.1%	-0.1%	-2.9%	-7.3%

Monthly Performance

	OCC	% CHG	ADR	% CHG	RevPAR	% CHG
Oct	73.1%	-5.1%	\$235	-3.9%	\$172	-8.8%
Nov	67.2%	-0.3%	\$208	-5.1%	\$140	-5.3%
Dec	54.8%	-1.6%	\$196	-3.8%	\$107	-5.3%

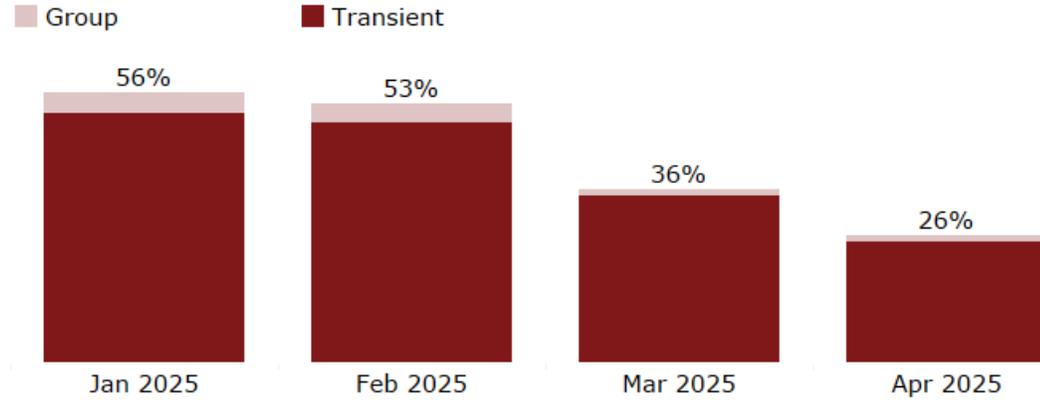
Hotel 4 Month Outlook

Data for zip code 86336



Occupancy as of 1/29/2025

Current Occupancy



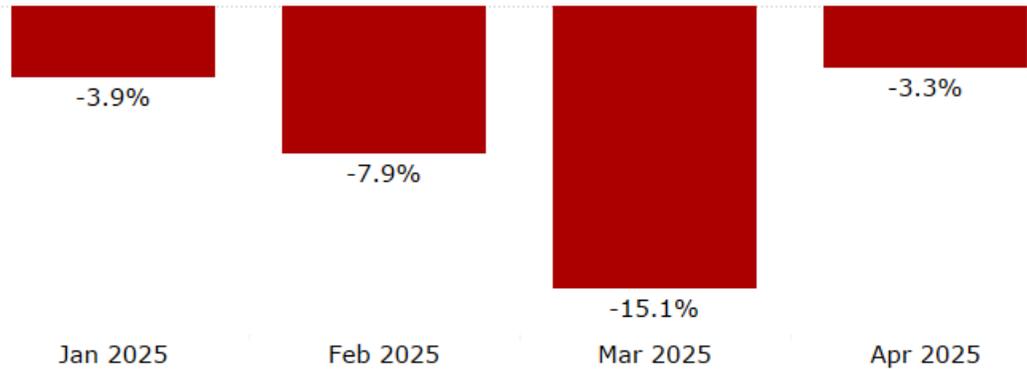
Bookings by Segment

	Jan 2025	Feb 2025	Mar 2025	Apr 2025
Transient	10.9K	9.4K	7.3K	5.1K
Group Booked	896	760	264	252
Group Committed	938	1.1K	1.1K	1.8K
Total with Group Committed	11.8K	10.5K	8.5K	6.9K

Rooms Booked

Booking Pace

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

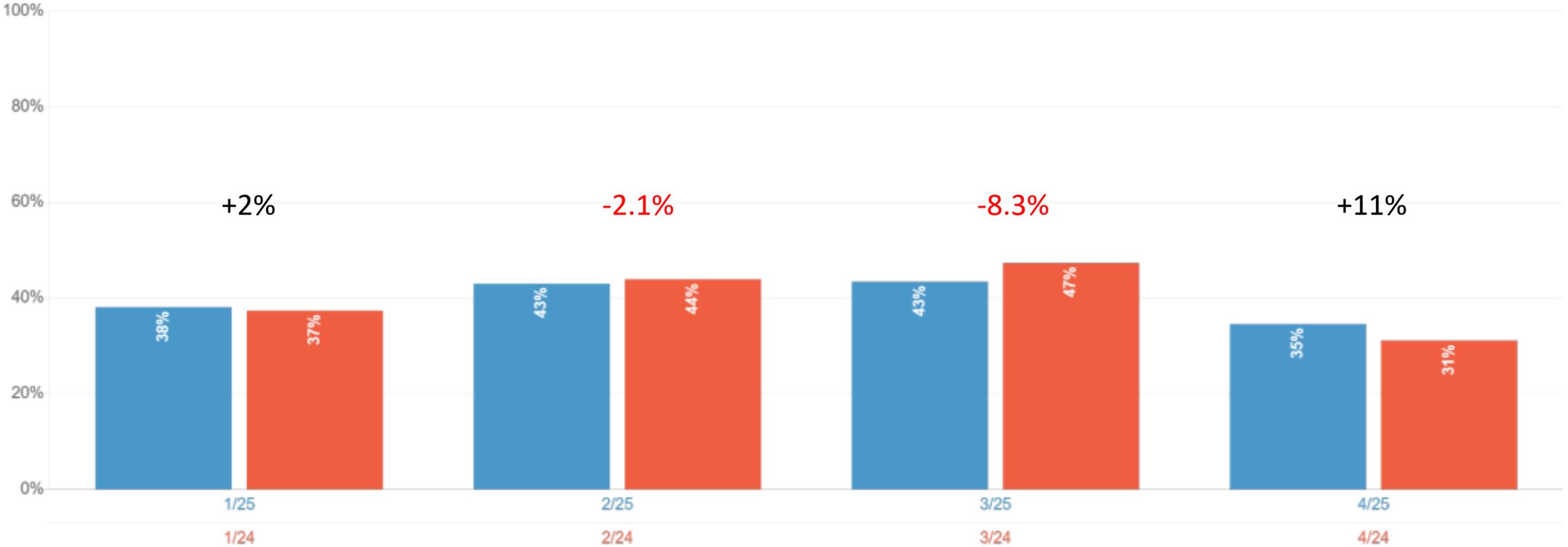


YOY % Change

	Jan 2025	Feb 2025	Mar 2025	Apr 2025
Transient	-5.7%	-10.4%	-16.4%	-2.3%
Group Booked	+26.2%	+38.7%	+48.3%	-19.2%
Group Committed	+34.8%	+52.3%	+102.3%	+61.7%
Total with Group Committed	-3.4%	-6.4%	-9.2%	+9.0%

Occupancy

1/1/2025 to 4/30/2025 as of 2/5/2025 | 39.7% 1/1/2024 to 4/30/2024 as of 2/7/2024 | 39.9%



Copyright Key Data, LLC 2025
 Created: 2/5/25 08:02 AM
 Data Source: Airbnb
 Market(s): Residential Zone
 Filter(s): none



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Short Term Rental Review Direct Source

December 2024



City of Sedona Performance

Calendar Year-to-Date Performance
compared to last year

Occupancy	ADR	RevPAR
50.0%	\$400	\$200
+0.2%	+2.7%	+2.9%

Monthly Performance

	OCC	% CHG	ADR	% CHG	RevPAR	% CHG
Oct	59.5%	-3.2%	\$425	+6.9%	\$253	+3.5%
Nov	55.0%	+6.3%	\$428	-0.5%	\$235	+5.8%
Dec	46.4%	-0.9%	\$459	+0.9%	\$213	+0.0%

Greater Sedona Performance

Calendar Year-to-Date Performance
compared to last year

Occupancy	ADR	RevPAR
50.3%	\$351	\$177
+1.3%	+0.3%	+1.6%

Monthly Performance

	OCC	% CHG	ADR	% CHG	RevPAR	% CHG
Oct	59.8%	-2.2%	\$365	+3.6%	\$218	+1.3%
Nov	53.9%	+4.2%	\$376	-0.4%	\$203	+3.8%
Dec	45.8%	+2.2%	\$404	-1.9%	\$185	+0.3%

Village of Oak Creek Performance

Calendar Year-to-Date Performance
compared to last year

Occupancy	ADR	RevPAR
52.3%	\$216	\$113
+3.3%	-4.5%	-1.3%

Monthly Performance

	OCC	% CHG	ADR	% CHG	RevPAR	% CHG
Oct	61.0%	-2.1%	\$212	-1.5%	\$129	-3.5%
Nov	50.7%	-2.9%	\$222	-1.7%	\$113	-4.5%
Dec	45.3%	+9.6%	\$249	-8.1%	\$113	+0.8%

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

December 2024



City of Sedona Performance

Calendar Year-to-Date Performance
compared to last year

Occupancy	ADR	RevPAR
38.9% +0.8%	\$345 +7.2%	\$134 +8.1%

Monthly Performance

	OCC	% CHG	ADR	% CHG	RevPAR	% CHG
Oct	45.9%	-5.6%	\$366	+10.0%	\$168	+3.8%
Nov	44.2%	-0.1%	\$357	+6.1%	\$158	+5.9%
Dec	36.3%	-4.2%	\$376	+7.1%	\$137	+2.6%

Greater Sedona Performance

Calendar Year-to-Date Performance
compared to last year

Occupancy	ADR	RevPAR
37.9% +0.1%	\$321 +7.0%	\$122 +7.2%

Monthly Performance

	OCC	% CHG	ADR	% CHG	RevPAR	% CHG
Oct	44.3%	-8.1%	\$341	+10.4%	\$151	+1.4%
Nov	42.2%	-1.9%	\$332	+6.2%	\$140	+4.2%
Dec	34.7%	-4.8%	\$349	+7.2%	\$121	+2.0%

Village of Oak Creek Performance

Calendar Year-to-Date Performance
compared to last year

Occupancy	ADR	RevPAR
34.5% -1.2%	\$253 +4.7%	\$87 +3.5%

Monthly Performance

	OCC	% CHG	ADR	% CHG	RevPAR	% CHG
Oct	40.4%	-12.9%	\$265	+6.2%	\$107	-7.5%
Nov	36.2%	-8.8%	\$252	+3.5%	\$91	-5.6%
Dec	29.4%	-9.7%	\$281	+11.5%	\$83	+0.7%

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

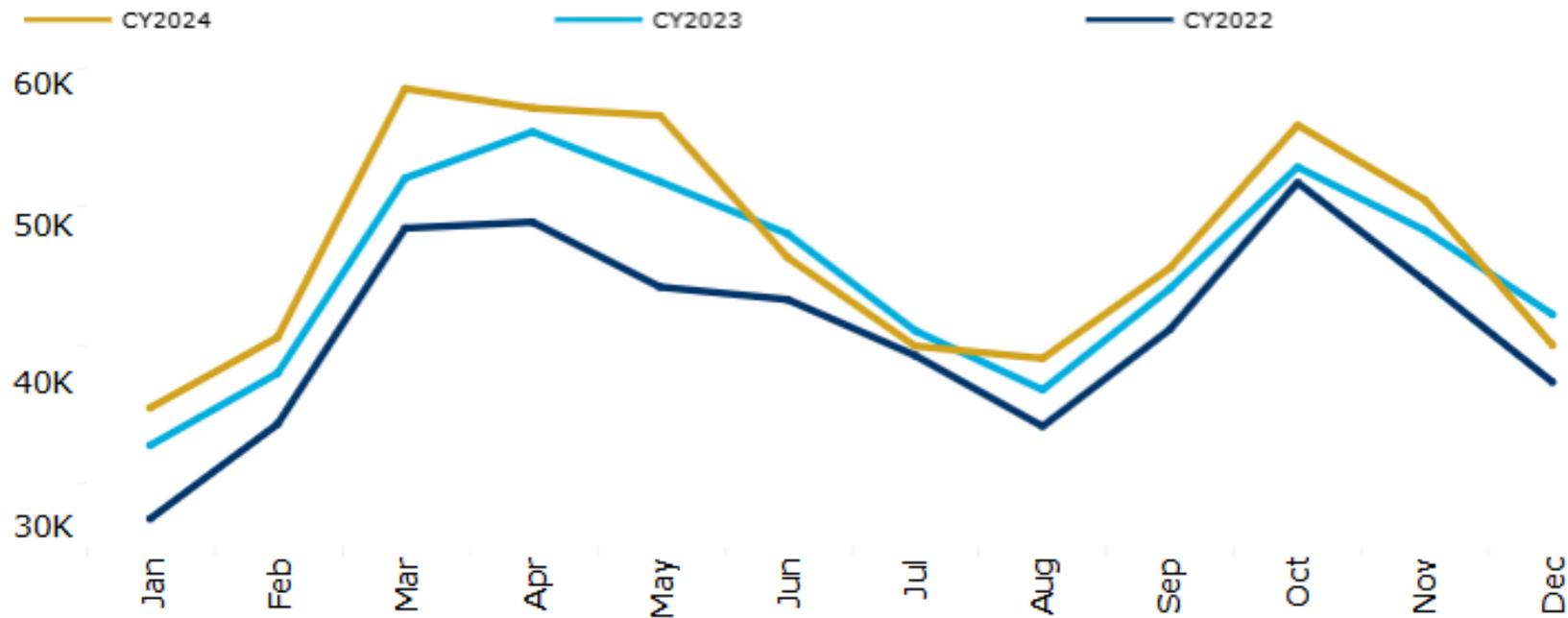
2024 Year In Review



Sedona Hotels showed improvements in all KPI's

	Occupancy	ADR	RevPAR	Supply	Demand	Revenue
YTD Calendar Year	68.3%	\$340.88	\$232.81	852.6K	582.3K	\$198.5M
YTD Change vs. Previous Year	▲ 3.3%	▲ 2.0%	▲ 5.3%	▲ 0.2%	▲ 3.5%	▲ 5.5%

Demand YOY Comparison



- Demand trends showed strength most of the year with the exception on June, July and December

Lodging overall was strong in 2024

Hotel Performance

Source: STR (Sedona+)

Calendar Year-to-Date	Occupancy 68.3%	ADR \$340.88	RevPAR \$232.81	Revenue \$198.5M
YTD YOY % Change	+3.3% YOY	+2.0% YOY	+5.3% YOY	+5.5% YOY

Short Term Vacation Rental Performance - Direct

Source: KeyData (Vacation Area - City of Sedona)

Calendar Year-to-Date	51.0%	\$382.99	\$195.42	\$21.2M
YTD YOY % Change	+2.0% YOY	+0.6% YOY	+2.7% YOY	+10.7% YOY

Short Term Vacation Rental Performance - Scraped AirBnB Data

Source: KeyData (Vacation Area - City of Sedona)

Calendar Year-to-Date	38.9%	\$344.65	\$134.02	\$106.1M
YTD YOY % Change	+0.8% YOY	+7.2% YOY	+8.1% YOY	+28.2% YOY

- Occupancy trends for short term rentals and hotels mirrored each other all year
- Hotel rates were stronger than short term rentals in the spring and in the fall. Helping lodging rates grow in both segments
- Aggregated Hotel demand and scraped AirBnB data demand shows an overall demand growth of 8.6% for the year

Longer visitation from further locations helped drive demand

Sedona : January 01, 2024 to December 31, 2024

Greater Sedona Area : January 01, 2023 to December 31, 2023



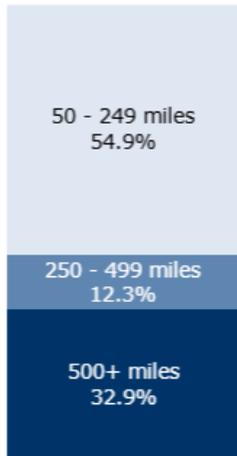
2.7 days
Avg Length of Stay



2.1 days
Avg Length of Stay

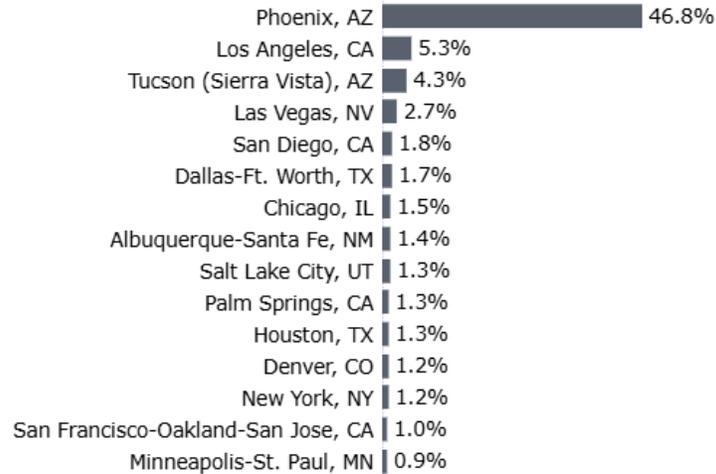
Distance Share

% share of total



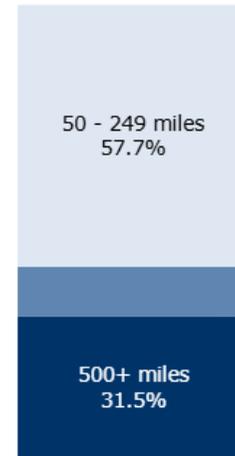
Top Visitor Origin DMAs

% share of total



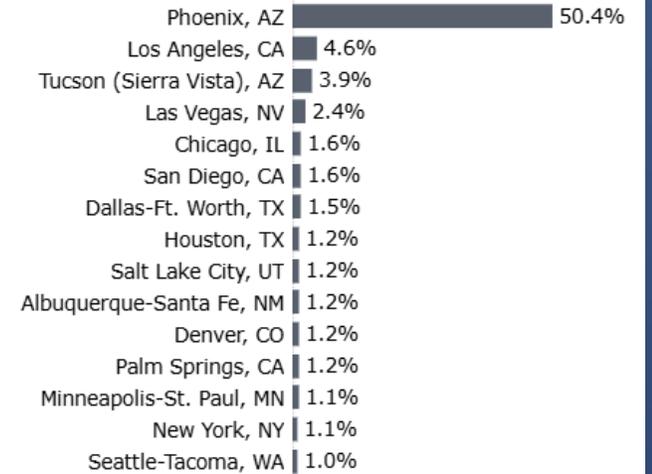
Distance Share

% share of total

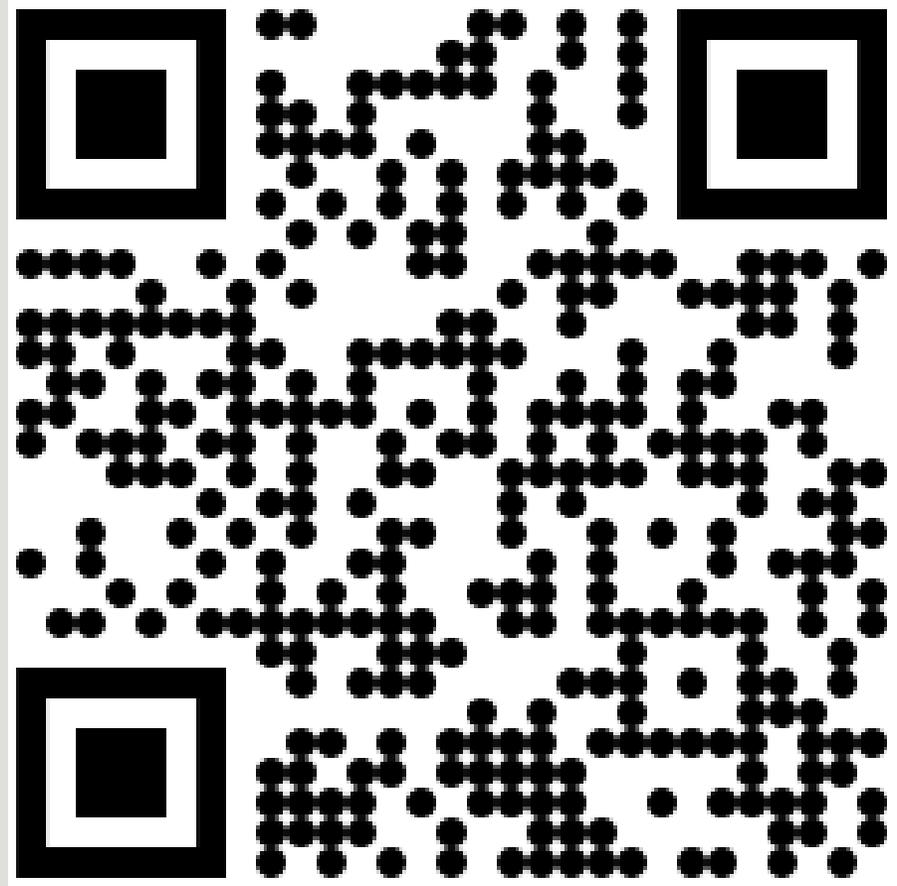


Top Visitor Origin DMAs

% share of total



Sedona Tourism Industry Newsletter



TOURISM PROGRAM

THANK YOU

