



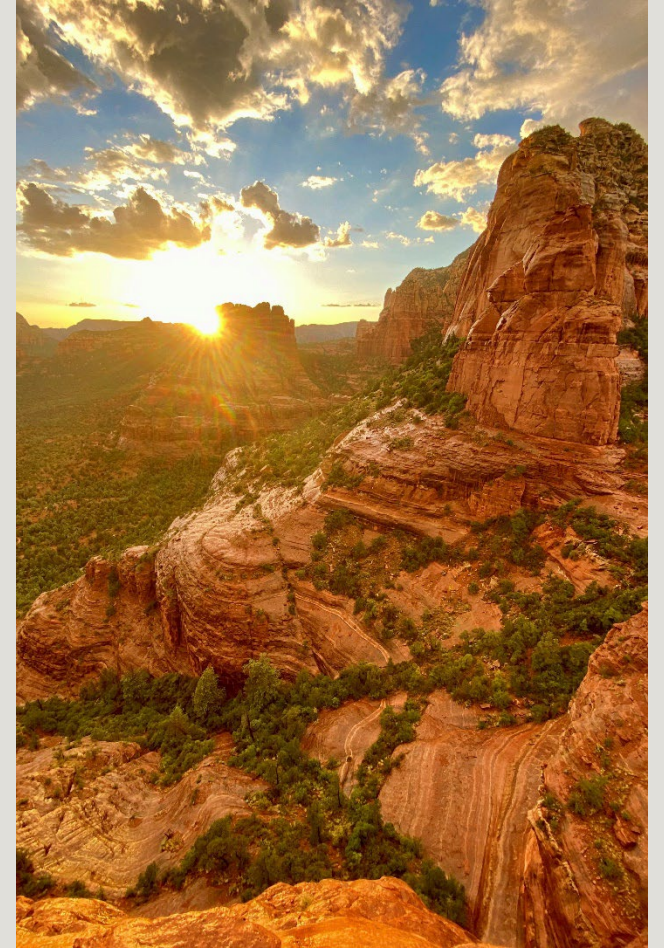
CITY OF SEDONA

TOURISM PROGRAM

Lodging Council Meeting
November 12, 2024

FY25 Updates

- 14 Meeting Sales leads have been facilitated
 - We have activated our HelmsBriscoe membership
- 16 Journalists have been assisted
- 1 summer campaign completed
- 1 winter campaign getting ready to launch



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*

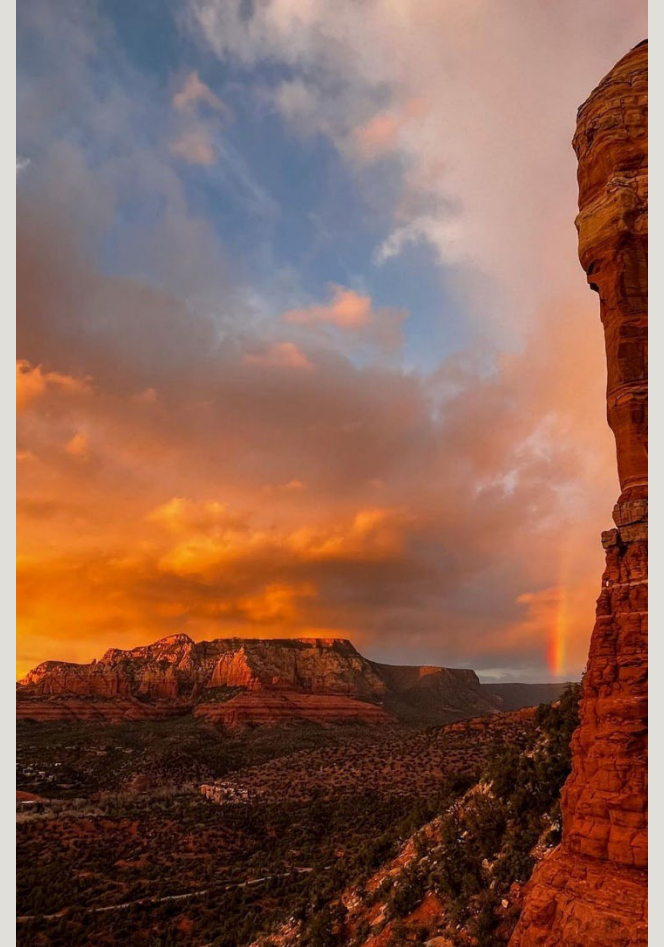




TOURISM PROGRAM

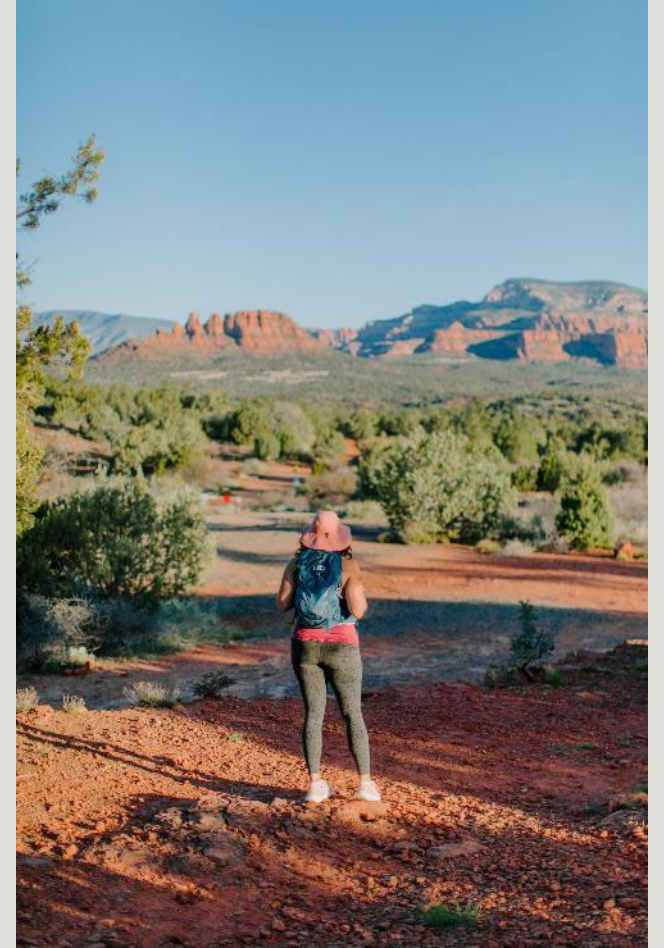
FY25 Trade Show Updates

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

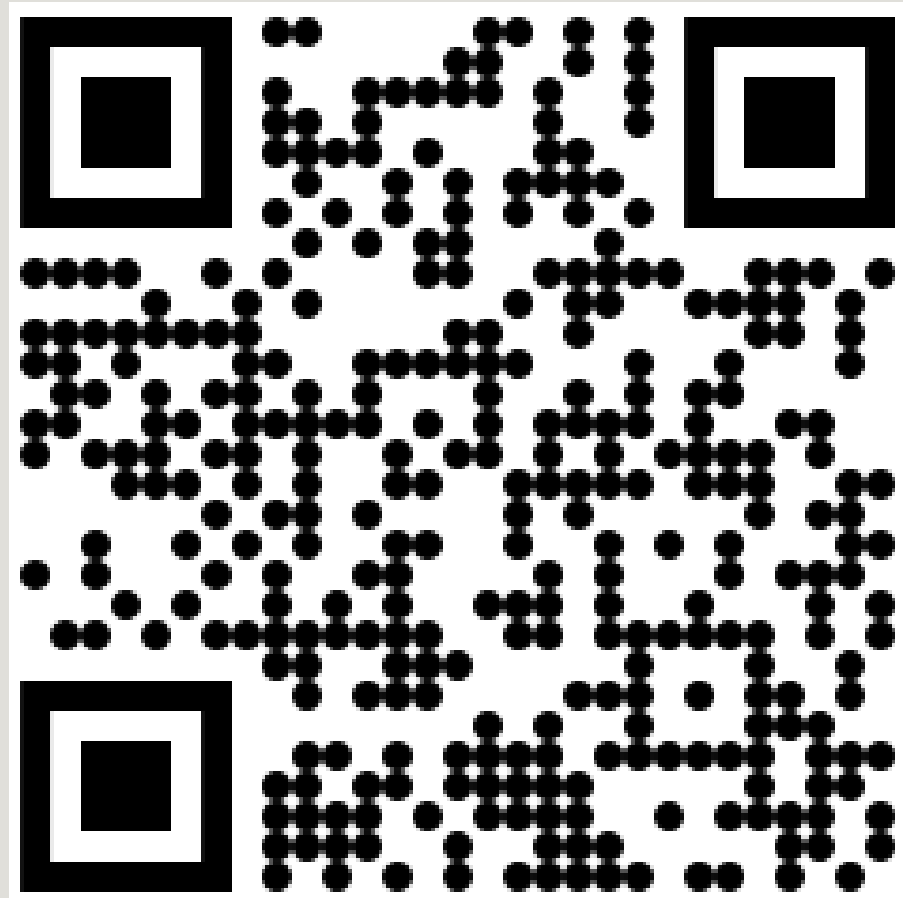


Group Discussion

- How would you like me to represent you during upcoming trade shows?
- What resources are you able to share with me to better represent your business?
- What trade shows should we be exploring in FY26?
 - For example, ABA, IMEX, or M&I



Sedona Tourism Industry Newsletter



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)

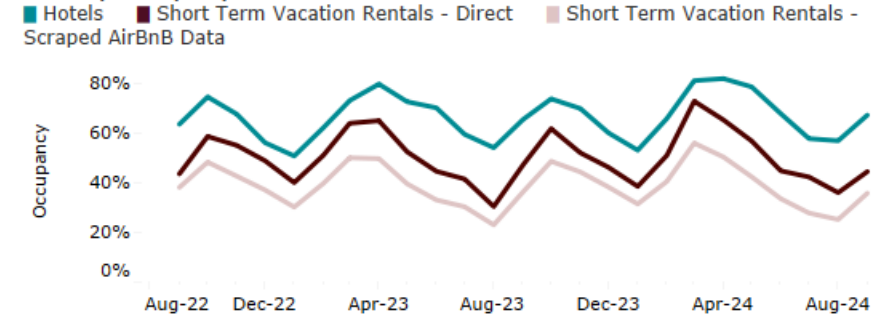
	Occupancy	ADR	RevPAR	Revenue
Sep 2024	44.6%	\$340.52	\$151.97	\$1.3M
YOY % Change	-5.6% YOY	-3.1% YOY	-8.5% YOY	-0.2% YOY
Calendar Year-to-Date	50.3%	\$358.57	\$180.27	\$13.1M
YTD YOY % Change	+3.4% YOY	-1.5% YOY	+1.9% YOY	+5.3% YOY

Short Term Vacation Rental Performance - Scraped AirBnB Data

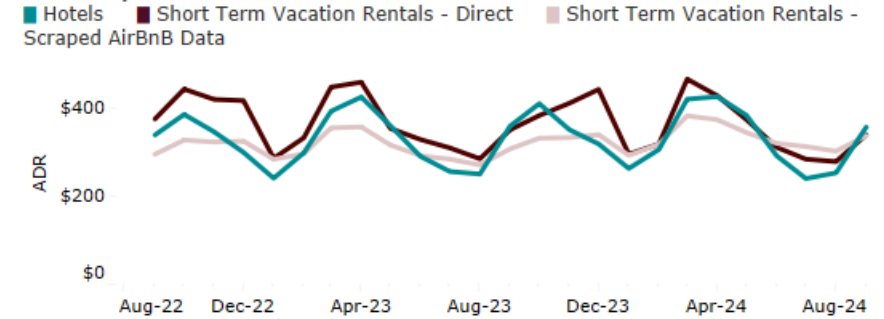
Source: KeyData (Vacation Area - City of Sedona)

	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

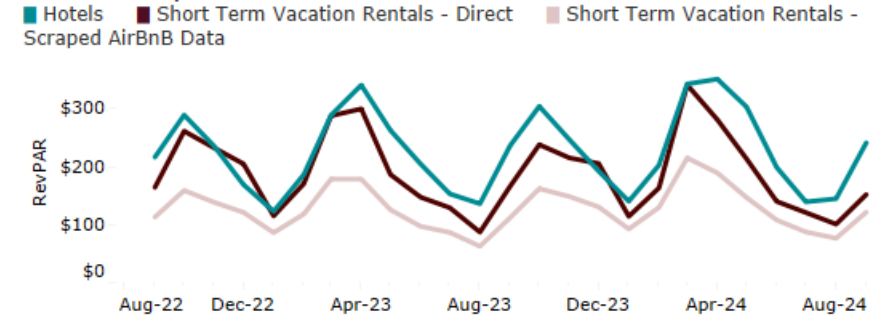
Occupancy by Month



ADR by Month



RevPAR by Month





Sedona+ Hotel Performance

Calendar Year-to-Date Performance
compared to last year

Occupancy	ADR	RevPAR	Supply	Demand	Revenue
68.0%	\$337	\$229	589.5K	400.9K	\$135.2M
+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
63.6%	\$202	\$129	212.4K	135.1K	\$27.3M
-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

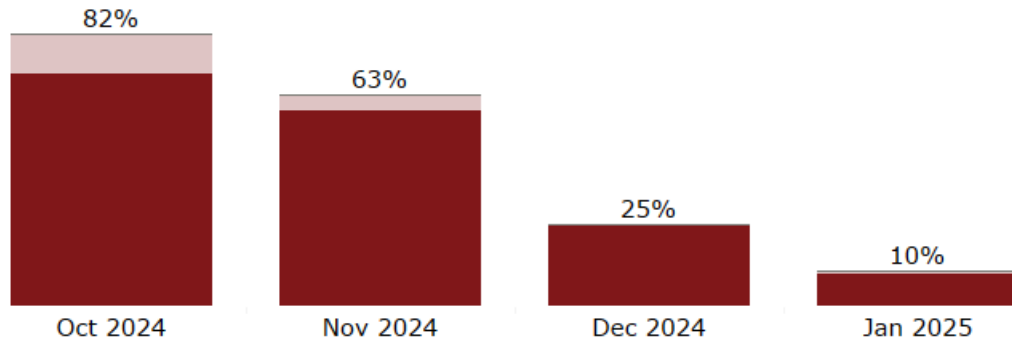
Data for zip code 86336



Occupancy as of 10/30/2024

Current Occupancy

■ Other ■ Group ■ Transient



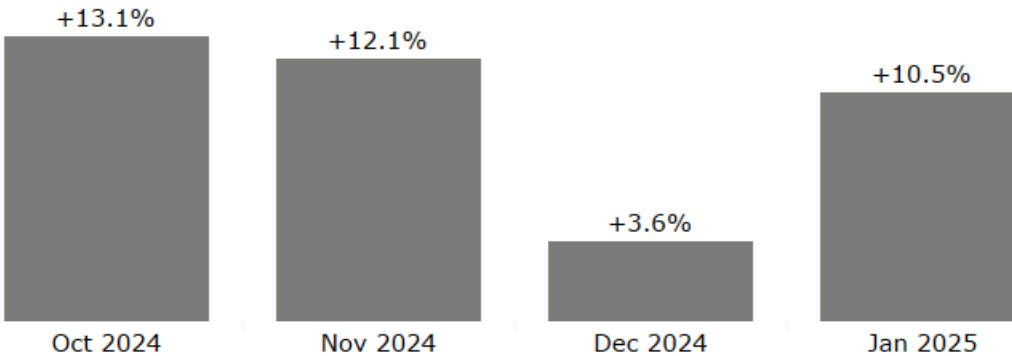
Bookings by Segment

	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
Total	23.3K	17.4K	7.0K	2.9K

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%
Total	+13.1%	+12.1%	+3.6%	+10.5%

Short Term Rental Review Direct Source

September 2024



City of Sedona Performance

Calendar Year-to-Date Performance
compared to last year

Occupancy	ADR	RevPAR
50.3%	\$359	\$180
+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
50.5%	\$319	\$161
+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
52.6%	\$207	\$109
+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
38.1% +3.6%	\$339 +8.0%	\$129 +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
37.4% +3.3%	\$318 +8.2%	\$119 +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
34.6% +3.8%	\$257 +7.6%	\$89 +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)

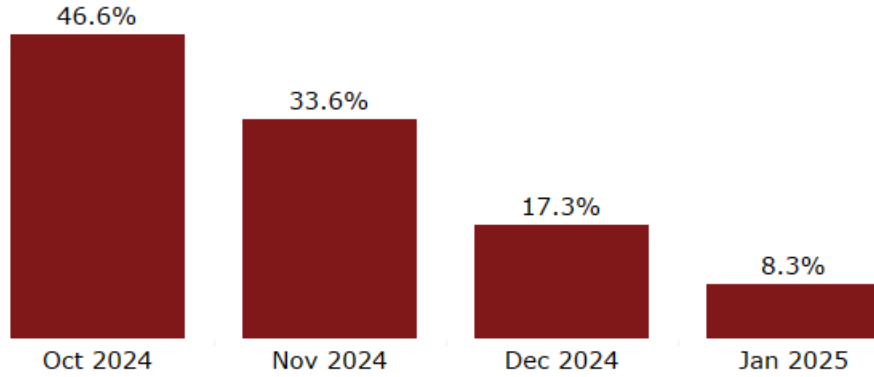
Short Term Lodging 4 Month Outlook

Vacation Area - City of Sedona



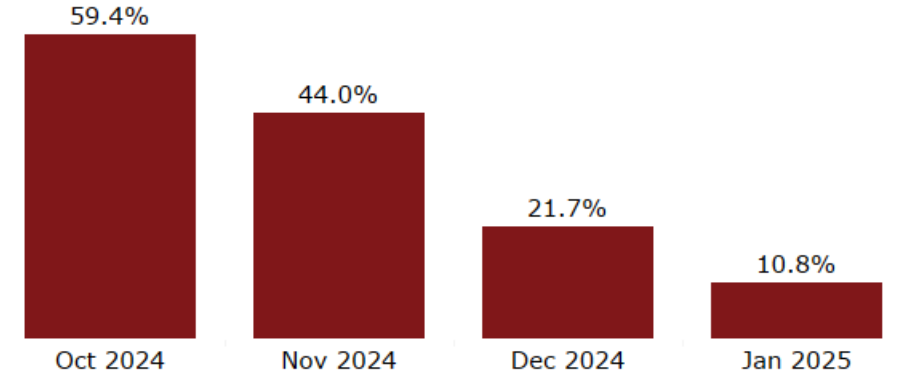
OTA AirBNB

Occupancy Outlook

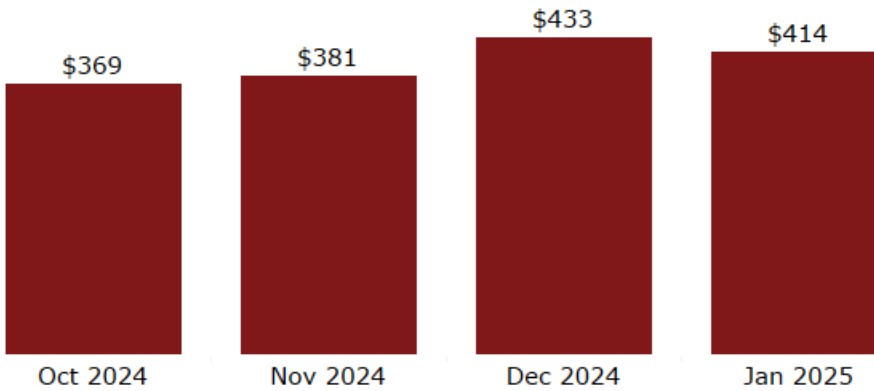


Direct PRO

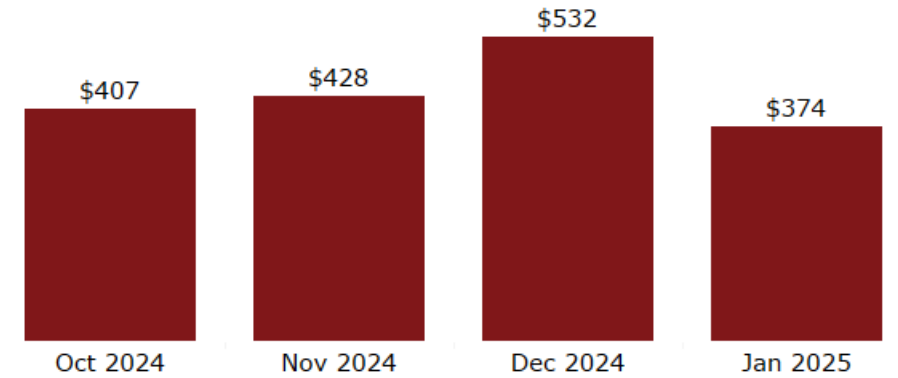
Occupancy Outlook



ADR Outlook



ADR Outlook



Visitor Spending

September 2024



Visitor Credit Card Spending

September 2024 Card Spend

\$7.3M

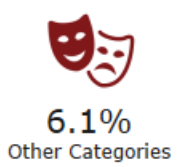
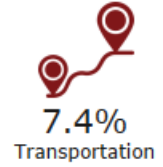
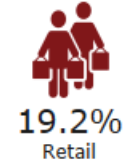
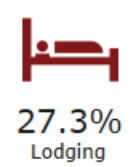
+1.7% YOY

Jan - Sep 2024 Card Spend

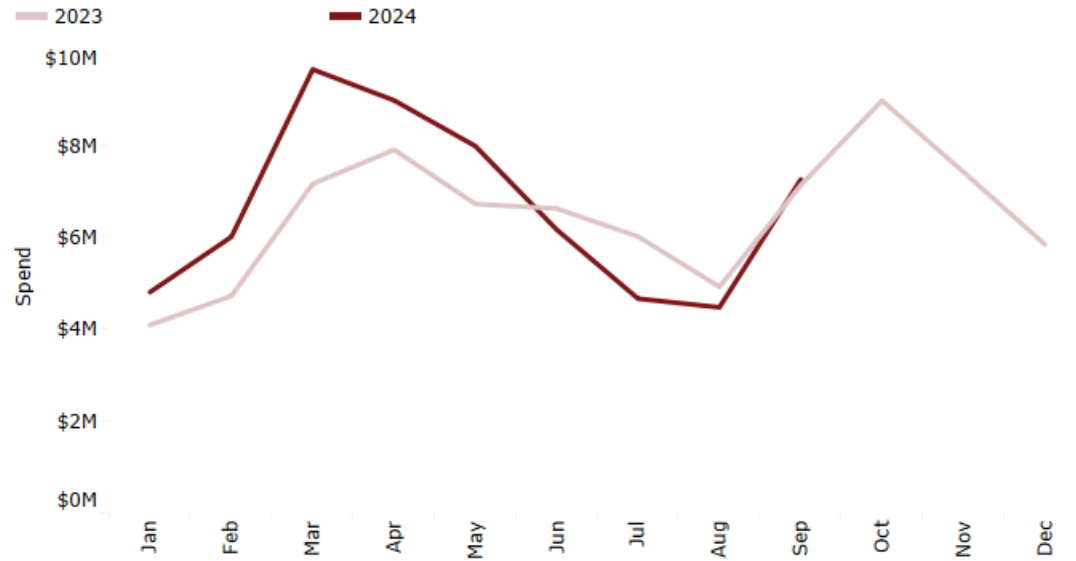
\$60.0M

+8.5% YOY

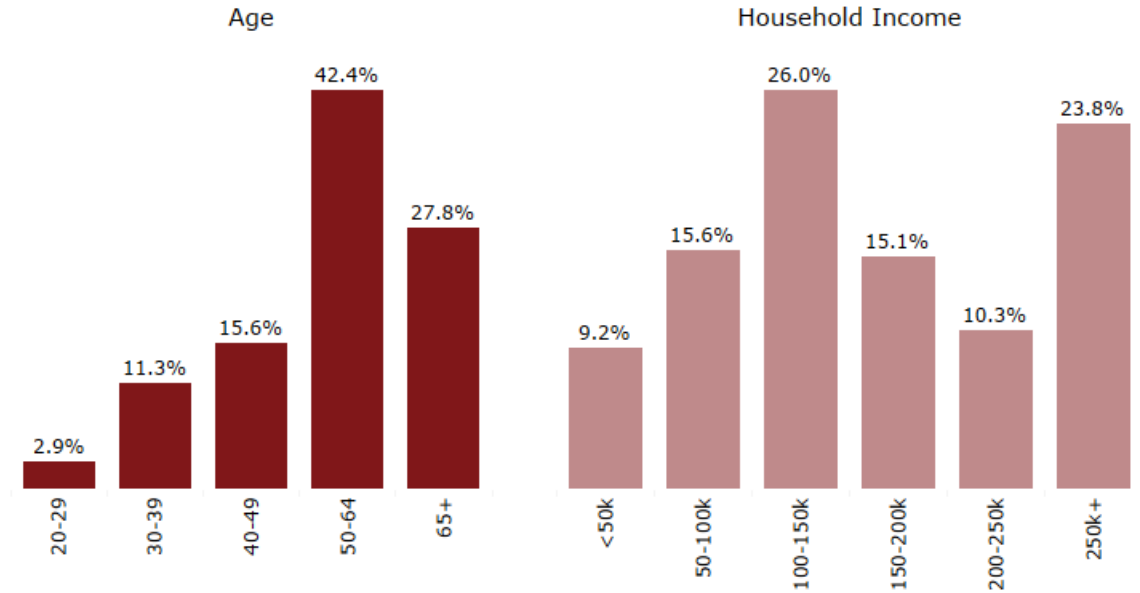
September 2024 Visitor Credit Card Spending



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

