



CITY OF SEDONA

TOURISM PROGRAM

Sedona Lodging Council
October 8, 2024 Meeting

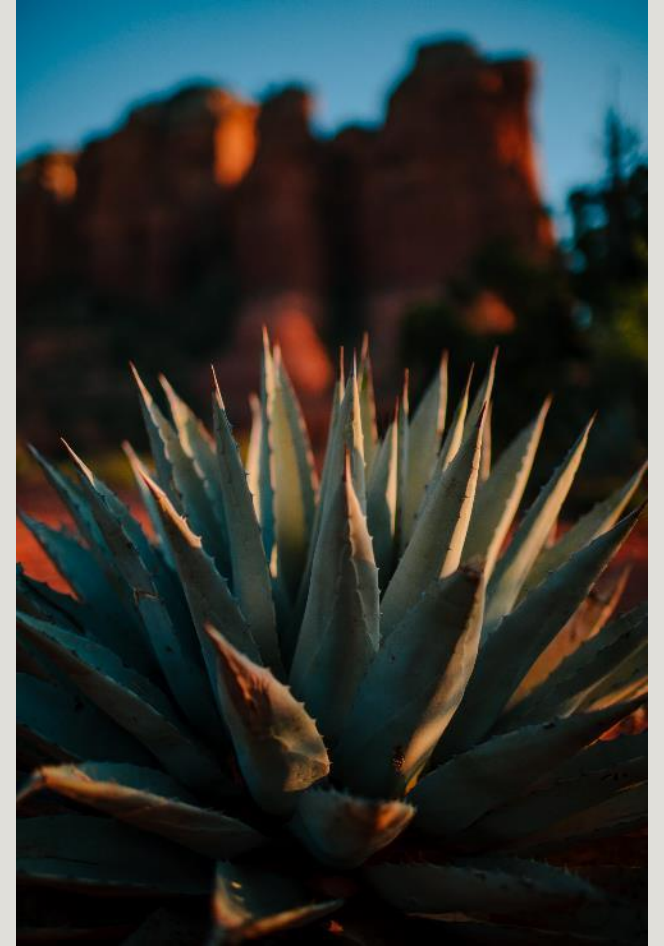


Monthly Summary Report

August 2024

Overview of Data Providers

- Smith Travel Research: hotel/motel performance
- KeyData: short term rental platform listing performance
 - Direct
 - Scraped Airbnb
- Amadeus: hotel booking pace
- TransUnion: credit card spend
- Azira: geolocation data



Smith Travel Research

- 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.

KeyData Direct

- City of Sedona includes 360 units managed by 34 property managers
- Village of Oak Creek includes 152 units managed by 16 property managers
- Greater Sedona includes 557 units managed by 39 property managers

KeyData Scraped Airbnb

- City of Sedona includes ~2,250 Airbnb listings
- Village of Oak Creek includes ~815 Airbnb listings
- Greater Sedona includes ~3,275 Airbnb listings

Amadeus

- Includes 9 properties within the 918 hotel rooms within the 86336 zip code



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Monthly Historical Lodging

August 2024 | Sedona



Hotel Performance

Source: STR (Sedona+)

| | Occupancy | ADR | RevPAR | Revenue |
|-----------------------|-----------|-----------|-----------|-----------|
| Aug 2024 | 54.4% | \$243.73 | \$132.49 | \$8.9M |
| YOY % Change | +0.2% YOY | -2.8% YOY | -2.7% YOY | -2.7% YOY |
| Calendar Year-to-Date | 67.7% | \$334.07 | \$226.23 | \$118.7M |
| YTD YOY % Change | +3.4% YOY | +3.1% YOY | +6.6% YOY | +7.0% YOY |

Short Term Vacation Rental Performance - Direct

Source: KeyData (Vacation Area - City of Sedona)

| | Occupancy | ADR | RevPAR | Revenue |
|-----------------------|------------|-----------|------------|------------|
| Aug 2024 | 34.7% | \$278.86 | \$96.83 | \$843.0K |
| YOY % Change | +14.2% YOY | -2.4% YOY | +11.4% YOY | +22.0% YOY |
| Calendar Year-to-Date | 50.8% | \$360.17 | \$183.03 | \$11.7M |
| YTD YOY % Change | +4.2% YOY | -1.2% YOY | +2.9% YOY | +6.1% YOY |

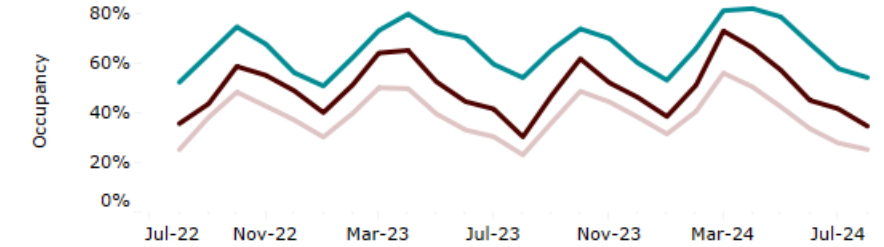
Short Term Vacation Rental Performance - Scraped AirBnB Data

Source: KeyData (Vacation Area - City of Sedona)

| | Occupancy | ADR | RevPAR | Revenue |
|-----------------------|-----------|------------|------------|------------|
| Aug 2024 | 25.3% | \$302.86 | \$76.59 | \$5.2M |
| YOY % Change | +9.4% YOY | +11.6% YOY | +22.1% YOY | +43.1% YOY |
| Calendar Year-to-Date | 38.4% | \$339.28 | \$130.33 | \$68.6M |
| YTD YOY % Change | +4.2% YOY | +7.7% YOY | +12.2% YOY | +37.2% YOY |

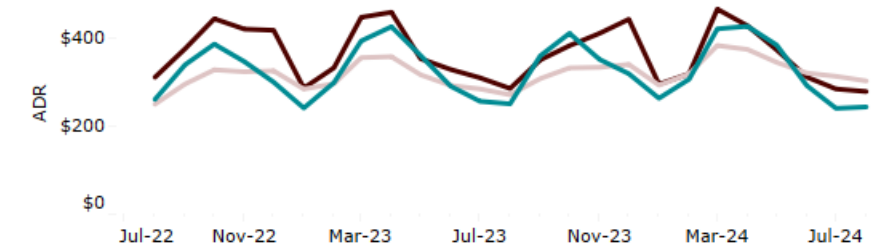
Occupancy by Month

Hotels Short Term Vacation Rentals - Direct Short Term Vacation Rentals - Scraped AirBnB Data



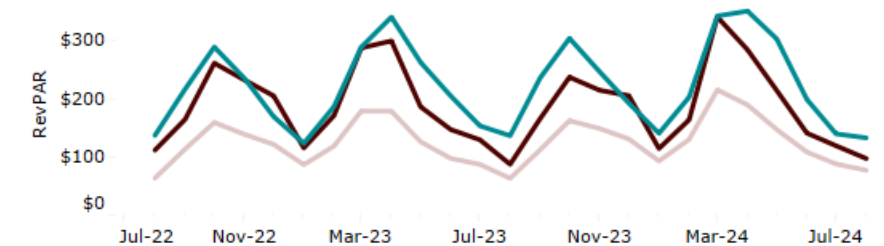
ADR by Month

Hotels Short Term Vacation Rentals - Direct Short Term Vacation Rentals - Scraped AirBnB Data



RevPAR by Month

Hotels Short Term Vacation Rentals - Direct Short Term Vacation Rentals - Scraped AirBnB Data





Sedona+ Hotel Performance

Calendar Year-to-Date Performance Sedona+

| | | | | | |
|--------------|--------------|--------------|---------------|---------------|-----------------|
| Occupancy | ADR | RevPAR | Supply | Demand | Revenue |
| 67.7% | \$334 | \$226 | 524.7K | 355.3K | \$118.7M |
| +3.4% | +3.1% | +6.6% | +0.4% | +3.8% | +7.0% |

Monthly Performance

| | OCC | % CHG | ADR | % CHG | RevPAR | % CHG |
|-----|-------|-------|-------|-------|--------|-------|
| Jun | 68.0% | -3.4% | \$292 | +0.5% | \$199 | -2.9% |
| Jul | 58.0% | -2.9% | \$241 | -6.3% | \$139 | -9.0% |
| Aug | 54.4% | +0.2% | \$244 | -2.8% | \$132 | -2.7% |

Village of Oak Creek+ Hotel Performance

Calendar Year-to-Date Performance Village of Oak Creek+

| | | | | | |
|--------------|--------------|--------------|---------------|---------------|----------------|
| Occupancy | ADR | RevPAR | Supply | Demand | Revenue |
| 63.4% | \$203 | \$129 | 188.3K | 119.5K | \$24.3M |
| -3.1% | -4.2% | -7.2% | -0.1% | -3.2% | -7.3% |

Monthly Performance

| | OCC | % CHG | ADR | % CHG | RevPAR | % CHG |
|-----|-------|-------|-------|--------|--------|--------|
| Jun | 67.2% | -2.1% | \$185 | -9.9% | \$124 | -11.8% |
| Jul | 61.7% | -4.8% | \$162 | -10.7% | \$100 | -14.9% |
| Aug | 55.5% | +4.2% | \$157 | -6.8% | \$87 | -2.9% |

Short Term Rental Review OTA AirBNB

August 2024



City of Sedona Performance

Calendar Year-to-Date Performance
Vacation Area - City of Sedona

Occupancy **38.4%**
+4.2%

ADR **\$339**
+7.7%

RevPAR **\$130**
+12.2%

Monthly Performance

| | OCC | % CHG | ADR | % CHG | RevPAR | % CHG |
|-----|-------|-------|-------|--------|--------|--------|
| Jun | 33.7% | +1.4% | \$321 | +9.7% | \$108 | +11.3% |
| Jul | 27.9% | -8.4% | \$313 | +10.1% | \$87 | +0.8% |
| Aug | 25.3% | +9.4% | \$303 | +11.6% | \$77 | +22.1% |

Greater Sedona Performance

Calendar Year-to-Date Performance
Vacation Area - Greater Sedona

Occupancy **37.6%**
+3.9%

ADR **\$318**
+7.9%

RevPAR **\$120**
+12.2%

Monthly Performance

| | OCC | % CHG | ADR | % CHG | RevPAR | % CHG |
|-----|-------|-------|-------|--------|--------|--------|
| Jun | 33.1% | +1.6% | \$307 | +11.7% | \$101 | +13.5% |
| Jul | 28.0% | -6.5% | \$299 | +10.5% | \$84 | +3.3% |
| Aug | 25.1% | +7.8% | \$293 | +15.5% | \$73 | +24.5% |

Village of Oak Creek Performance

Calendar Year-to-Date Performance
Vacation Area - Village of Oak Creek

Occupancy **34.7%**
+4.5%

ADR **\$256**
+7.1%

RevPAR **\$89**
+11.8%

Monthly Performance

| | OCC | % CHG | ADR | % CHG | RevPAR | % CHG |
|-----|-------|-------|-------|--------|--------|--------|
| Jun | 30.0% | +2.1% | \$254 | +15.3% | \$76 | +17.7% |
| Jul | 26.5% | -6.6% | \$257 | +12.8% | \$68 | +5.4% |
| Aug | 23.6% | +4.4% | \$251 | +24.8% | \$59 | +30.3% |

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

Hotel 4 Month Outlook

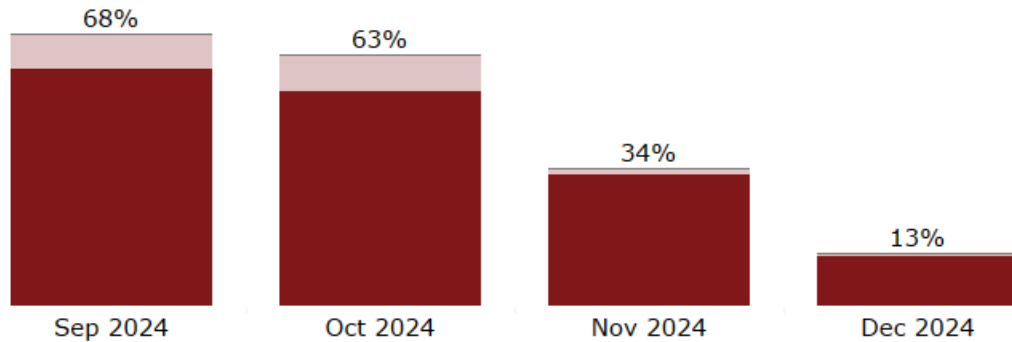
Data for zip code 86336



Occupancy as of 9/25/2024

Current Occupancy

Other Group Transient



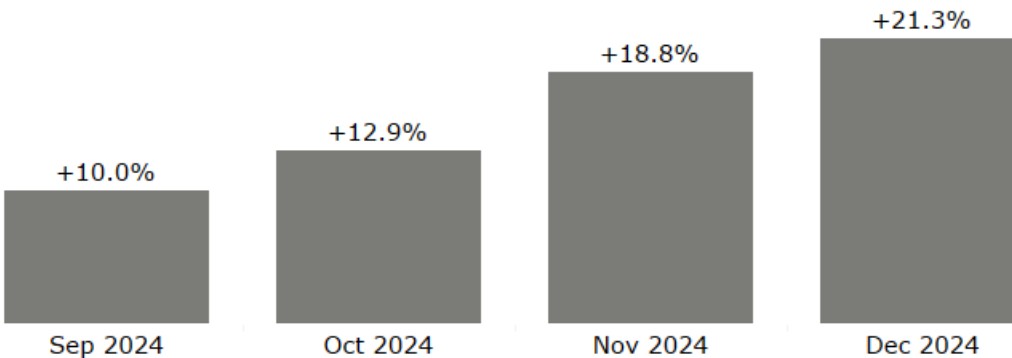
Bookings by Segment

| | Sep 2024 | Oct 2024 | Nov 2024 | Dec 2024 |
|--------------|--------------|--------------|-------------|-------------|
| Transient | 14.7K | 13.7K | 8.1K | 3.2K |
| Group | 2.2K | 2.4K | 429 | 82 |
| Other | 15 | 5 | 22 | 6 |
| Total | 16.9K | 16.1K | 8.5K | 3.3K |

Rooms Booked

Booking Pace

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



YOY % Change

| | Sep 2024 | Oct 2024 | Nov 2024 | Dec 2024 |
|--------------|---------------|---------------|---------------|---------------|
| Transient | +6.7% | +17.6% | +21.5% | +19.9% |
| Group | +46.5% | -3.1% | -6.3% | +1,950.0% |
| Other | -85.3% | -96.4% | -69.0% | -83.3% |
| Total | +10.0% | +12.9% | +18.8% | +21.3% |

Visit Sedona Spending Summary



Period: August 2024

Date
August 2024



\$4.5M
Card Spend

-9.1%
vs. Previous Year



28.8K
Cardholders

-10.1%
vs. Previous Year



\$155
Avg. Spend per
Cardholder

+1.1%
vs. Previous Year



65.9K
Transactions

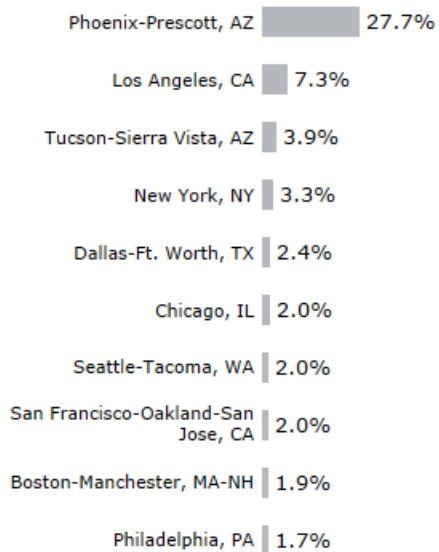
-13.4%
vs. Previous Year



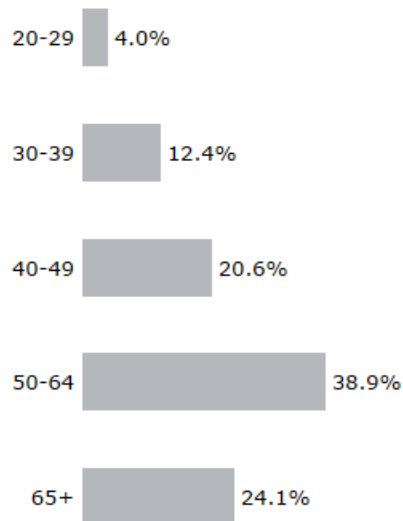
\$68
Avg. Spend per
Transaction

+4.9%
vs. Previous Year

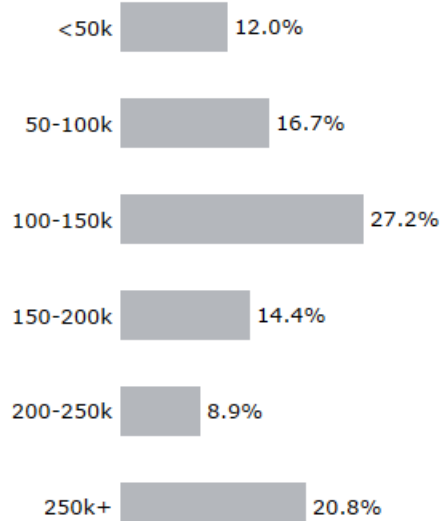
Top Origin DMAs



Spend Share by Age**

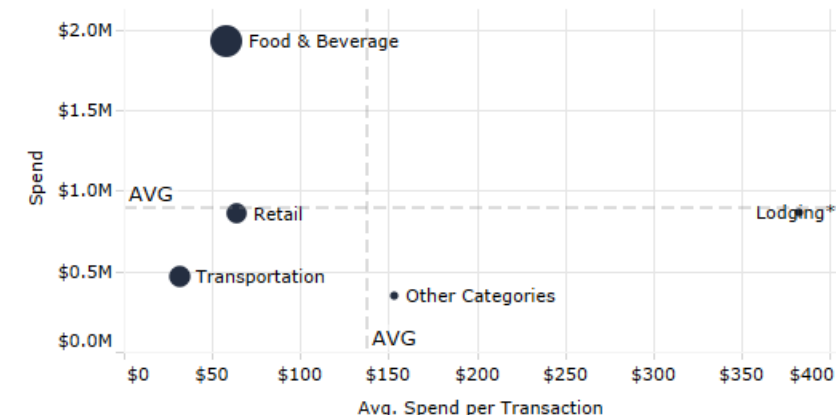


Spend Share by Income**



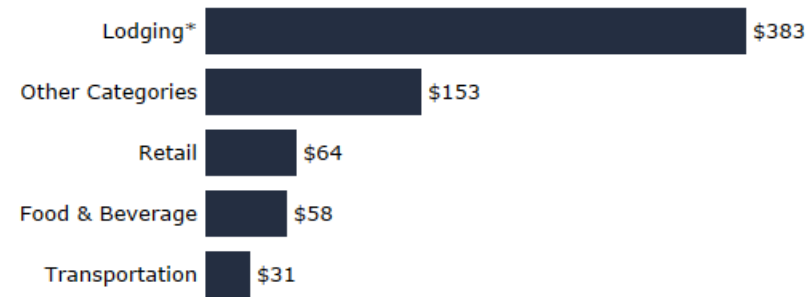
Spending vs. Avg. Spend per Transaction

Size of bubble denotes number of transactions



Spending Categories

Average spend per transaction



Avg. Spend per Transaction

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

Overnight Visitor Profile: Sedona

August 2024



August 2024 Domestic Visits



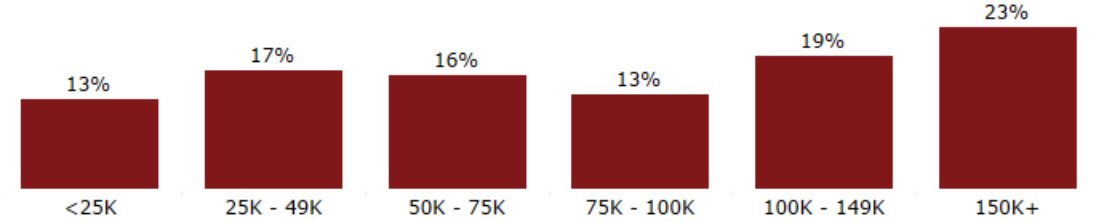
2.8 days
Avg. Length of Stay



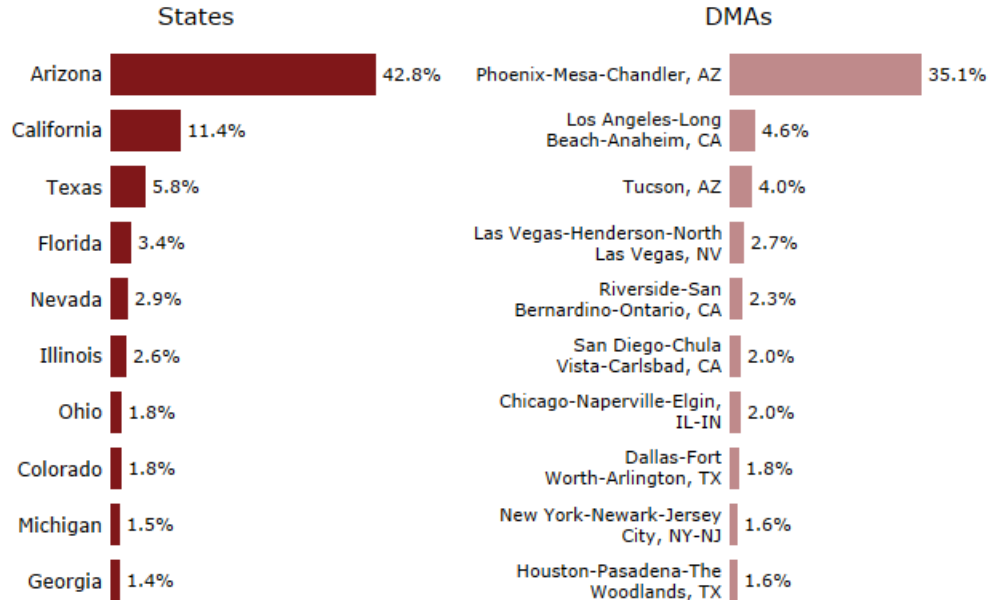
69.9%
Repeat Trip Share

August 2024 Domestic Visitor Origin Characteristics

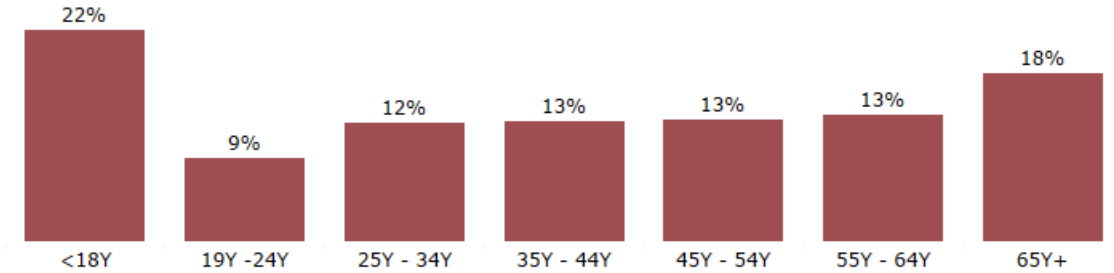
Household Income
Median: \$93.4K



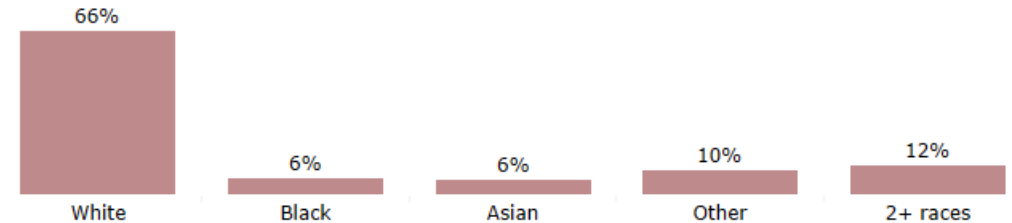
Top Origin Markets



Age



Race



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

Tourism Marketing & Branding Update

Summer Marketing Campaign Results

1) Three lanes of advertising from June 1 to Aug. 31:

- Paid search
- Meta ads for in-market
- Attribution ads for out-of-market

2) In-market targeting included:

- 25-mile radius around Sedona and Phoenix

3) Out-of-market cities included:

- Phoenix
- Los Angeles
- Tucson
- San Francisco
- Las Vegas
- San Diego
- New York
- Chicago
- Seattle
- Denver



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Key Takeaways

- The attribution ads attracted over 12,000 new users to the site.
- Meta in-market campaigns brought more than 24,000 users to the site during the campaign and was the number one traffic source.
- All industry average benchmarks were met or exceeded.
- With ADR at \$261 and an average visitor spend of \$190/day, the total economic impact was \$5,059,197, with a ROAS of 67:1.

Attribution KPIs

ROAS:
67:1

**Total
Trips:**
11,194

**Visitor
Days:**
18,630

**Room
Nights:**
11,235

Marketing KPIs

Search CTR:
1.9% Over
Benchmark

Meta CTR:
68% Over
Benchmark

Web ads CTR:
16% Over
Benchmark

Meta Stewardship Campaign

Top Creatives

Summer Campaign

Performance:

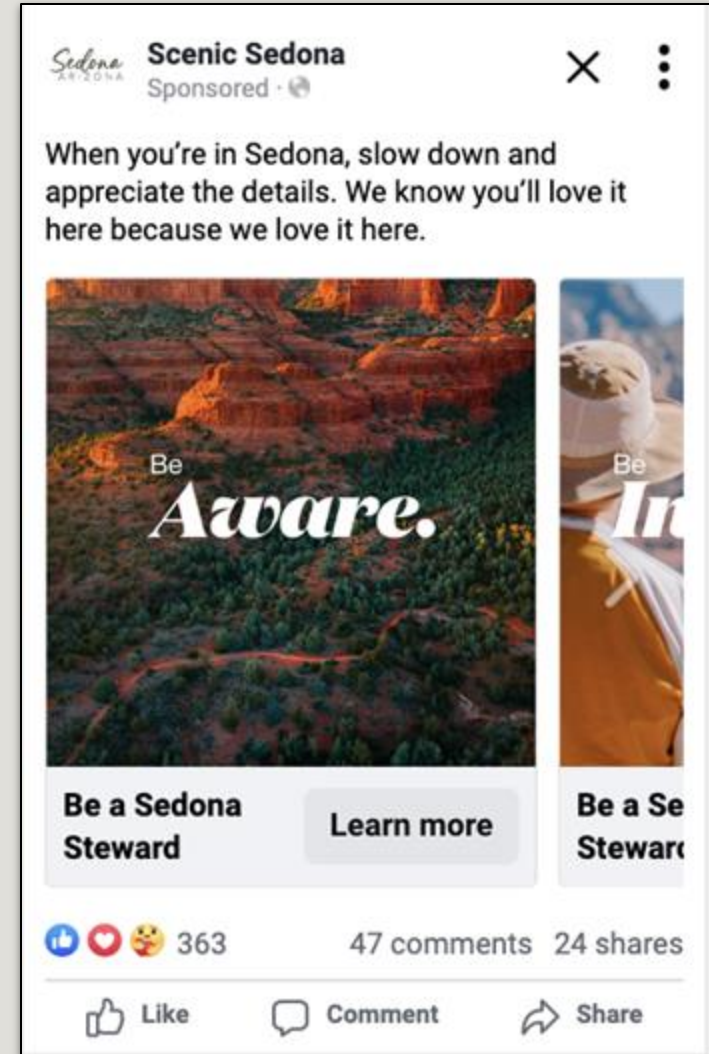
| | |
|--------------|-----------|
| Impressions: | 2,752,185 |
| Engagements: | 439,219 |
| Link Clicks: | 41,959 |
| CTR: | 1.52% |
| CPC: | \$0.45 |

The social campaign performance was extremely strong and during the summer campaign. Meta drove more than 20,000 users to the website.

The sustainability messaging resonated with our audience.

Benchmarks

CTR: 0.90%
CPC: \$0.63



Attribution Results - Destination (Out-of-Market Campaign)

Destination



Total Trips/Visits
11,194



Total Visitor Days Observed
18,630



Est. Average Length of Visit
1.7 Days



Est. Campaign Impact
\$2,126,860

| Top DMAs | Share | Avg Length of Stay |
|----------------------|-------|--------------------|
| Phoenix -Prescott | 50% | 1.6 Days |
| Los Angeles | 15.8% | 1.7 Days |
| Tucson -Sierra Vista | 9.8% | 1.7 Days |
| Las Vegas | 5.1% | 1.7 Days |
| San Diego | 4.5% | 1.8 Days |

Top DMA's for visitation to the destination aligns with the top delivery markets.

Attribution Results - Hotels (Out-of-Market Campaign)

Hotels



Total Trips/Visits

6,095



Est. Room Nights Observed

11,235



Est. Average Length of Visit

1.8 Days



Est. Campaign Impact

\$2,932,335

Top DMAs

Share

Avg Length of Stay

Phoenix -Prescott

57%

1.7 Days

Los Angeles

13.5%

1.9 Days

Tucson -Sierra Vista

7.8%

1.9 Days

Las Vegas

4.7%

1.9 Days

San Diego

4%

2 Days

Overnight stays in hotels also align with top delivery markets and audience targeting. More than 68% of all visitors that came from advertising stayed in a hotel.

Sedona Tourism Branding

Summer 2024



Tagline – Stay Inspired

- Sedona is endlessly inspiring. This tagline speaks to the emotional experience of residents and visitors.
- Why do people live here? Why do people visit? To be inspired by beauty, adventure, relaxation, self-discovery.
- Speaks directly to experience of residents – Sedona never gets old. It's about the quality of that experience.
- It has "before/during/after" qualities. You come seeking inspiration; you discover it while here (unexpected); take it with you when you leave; relive it looking back; visit again.
- It has a timeless feeling. Sedona changes you forever.
- If paired with a campaign, it provides opportunity for variation. For example: Stay. Inspired.
- “Stay” is an imperative – a call to action, a challenge, an ask.

Option 4

- Type inspired by the natural and raw beauty of rock formations
- Friendly and inviting
- A stroke through the mark evokes the sense of the Sedona skyline without being explicit

SEDONA
stay inspired

SEDONA
stay inspired

SEDONA
stay inspired

SEDONA
stay inspired

STAY EAT PLAY SHOP

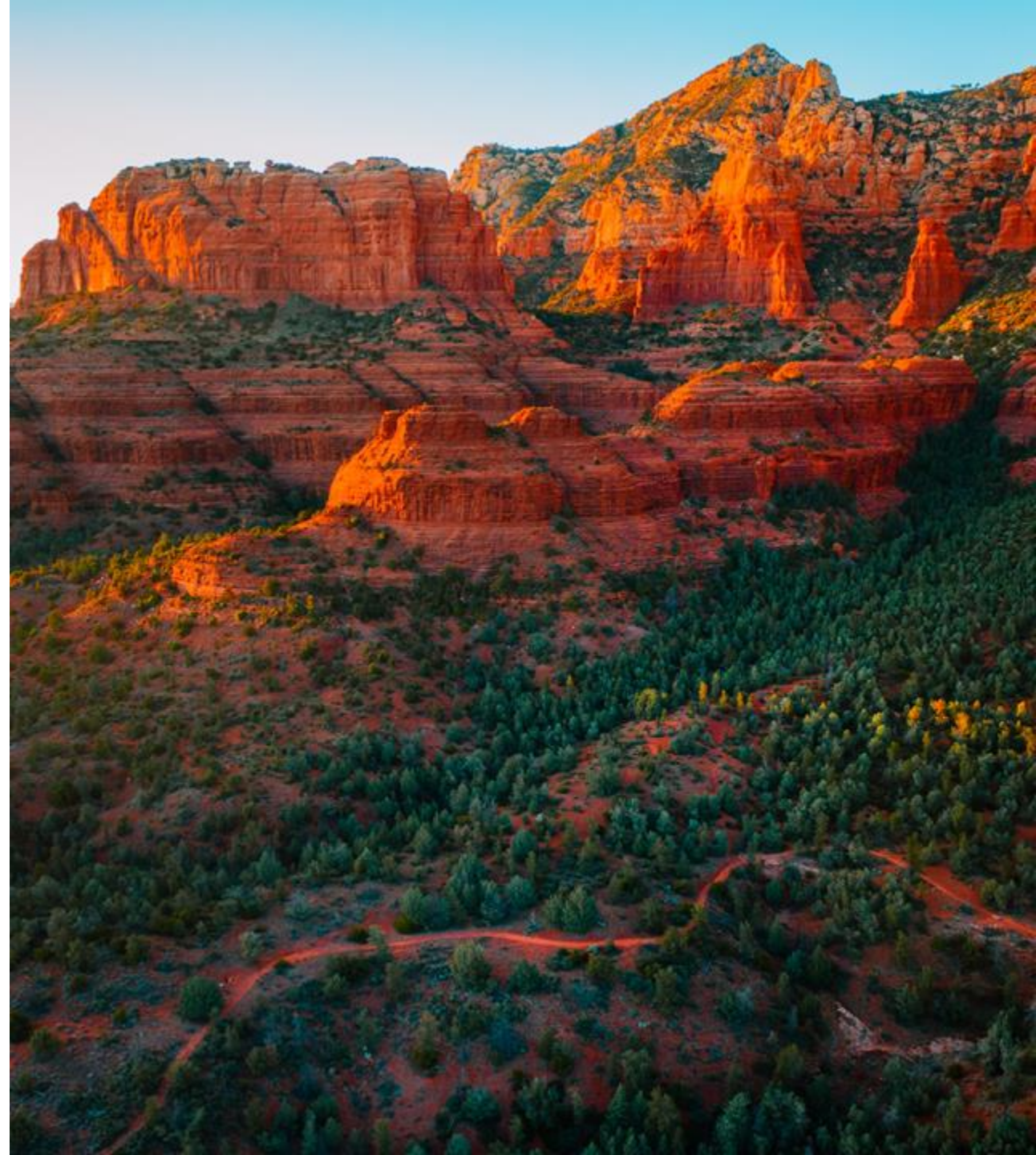
SEDONA

WELCOME TO SEDONA

You haven't been anywhere quite like Sedona. Small-town charm, world-class beauty. Local shops, restaurants and lodging, epic views in every direction. We know you'll love it here because we love it here. And we want you to enjoy it, appreciate it, and care for it like we do.

Sedona

Concept Development | 2024



Concept

Redefine Desert

This concept invites the viewer to redefine their preconceived notions of the desert in general and Sedona in particular. To challenge, reimagine and rethink what the area has to offer. We show images breaking the frame, words highlight experiences and a graphic element that speaks to long held traditions.

Through all these elements we can position Sedona as a different kind of desert, a different kind of experience. One to be valued.





Frame Options

Note:
Option 1 features a slightly shrunken down pattern from what was seen before, in an effort to allow messaging to stand out.



Option 1



Option 2



Option 3



INSPIRATION

The best Christmas holiday destinations

Fresh ideas whether you're travelling solo or taking the whole family

BY LAURA CHISSI, ANYA MEYEROWITZ AND EMMA LOVE





Redefine Date Night

Forget what you think you know about the desert. In Sedona, leaves dance in the trees and cool rivers flow. Trails wind through green forests and striking rock formations. Epic views awash in color inspire you at every turn. And first-rate dining delights visitors with dishes that will leave you wanting more. It's time to rethink your idea of the desert and embrace a place unlike any other.

Learn more at scenic Sedona.com

SEDONA
redefine desert

Body Copy

Forget what you think you know about the desert. In Sedona, leaves dance in the trees and cool waters flow. Trails wind through green forests and striking rock formations. Epic views awash in color inspire you at every turn. And first-rate dining delights visitors with dishes that will leave you wanting more. It's time to rethink your idea of the desert and embrace a place unlike any other..

learn more at ScenicSedona.com

Redefine Connection

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SEDONA
redefine desert



THANK YOU

