

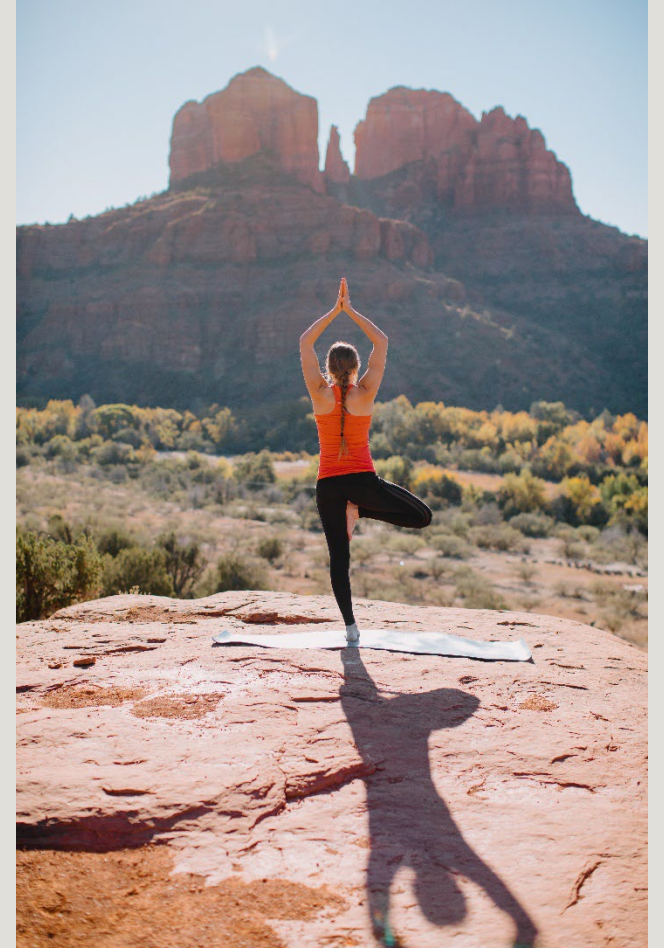


CITY OF SEDONA **TOURISM PROGRAM**

Lodging Council Meeting
January 14, 2025

Agenda Items

- Sedona tourism research update
- Trade show and FAM updates
- Winter campaign update
- Industry opportunities





Monthly Summary Report

November 2024



Tourism Market Indicators

November 2024

Demand for Sedona hotels increased by 3.8% in November, helping the market to end at 73.4% occupancy. The Village of Oak Creek had a -0.5% drop in demand to end at 67.1% occupancy this year. Short term rentals also showed increased demand for the month to end at 44.3% direct occupancy in the City of Sedona.

Rates in the market increased for hotel lodging by 2.9% in Sedona to end the month at \$355, similar to direct booked short term rentals which increased ADR by 9.4% to end the month at \$382. Hotel rates in the Village of Oak Creek were down -5% this month to end at \$207.

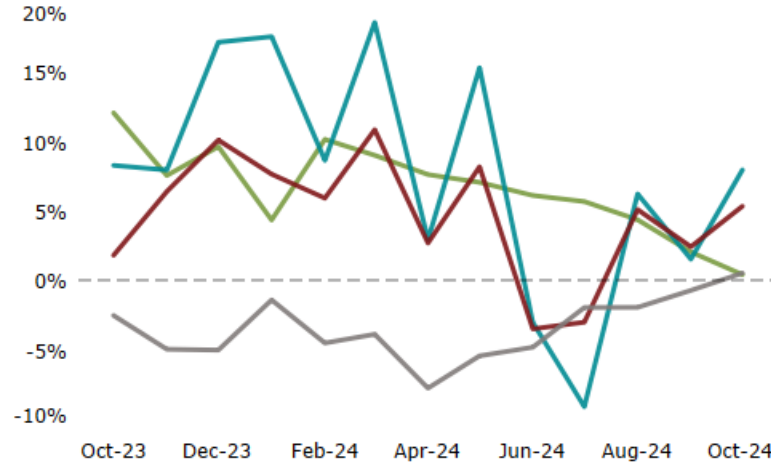
Booking pace is showing a strong first quarter as we go into 2025. January demand is currently only ahead by 0.6%, while February and March are both up over 5% heading into the new year.

Nationally, total nonfarm employment grew 227K in November, exceeding expectations. Leisure and hospitality picked up 53K jobs, an average gain of 21K jobs/month across the last 12 months, while Retail trade lost 28K jobs versus last month (mostly general merchandise retailers, down -15K).

Higher income U.S. households account for more than 60% of hotel spending, with 43% from households earning \$150K+. Economy tier hotels continue to underperform occupancy, given only 43% of lower income households have reported leisure travel plans in the next 6 months.

Recovery Indicators

% change relative to same month of previous year



■ Leisure & Hospitality Jobs ■ Hotel Revenue
■ Hotel Demand ■ TSA Throughput



73.4%

Hotel Occupancy

▲ 3.8% YOY



\$18.26M

Hotel Revenue

▲ 6.9% YOY



55.1%

Short Term Rental Occupancy - Direct

▲ 5.5% YOY



\$2,186.22K

Short Term Rental Revenue - Direct

▲ 16.8% YOY

Monthly Historical Lodging

November 2024 | Sedona



Hotel Performance

Source: STR (Sedona+)

	Occupancy	ADR	RevPAR	Revenue
Nov 2024	73.4%	\$354.80	\$260.39	\$18.3M
YOY % Change	+3.8% YOY	+2.9% YOY	+6.9% YOY	+6.9% YOY
Calendar Year-to-Date	69.2%	\$341.95	\$236.67	\$184.6M
YTD YOY % Change	+3.9% YOY	+1.7% YOY	+5.7% YOY	+6.0% YOY

Short Term Vacation Rental Performance - Direct

Source: KeyData (Vacation Area - City of Sedona)

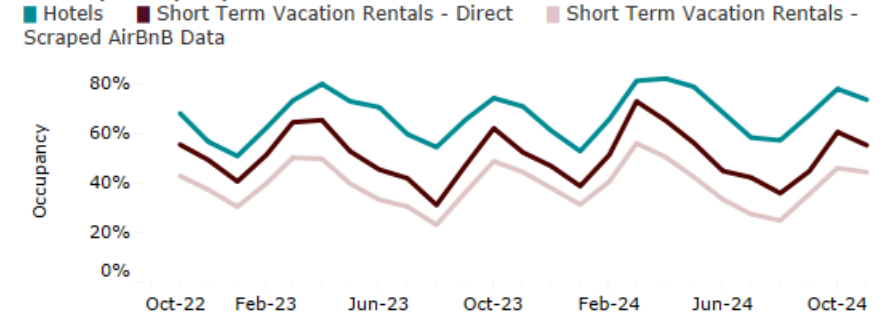
	Occupancy	ADR	RevPAR	Revenue
Nov 2024	55.1%	\$414.61	\$228.42	\$2.2M
YOY % Change	+5.5% YOY	-0.9% YOY	+4.6% YOY	+16.8% YOY
Calendar Year-to-Date	51.5%	\$377.55	\$194.33	\$19.1M
YTD YOY % Change	+2.3% YOY	+0.7% YOY	+3.1% YOY	+10.5% YOY

Short Term Vacation Rental Performance - Scraped AirBnB Data

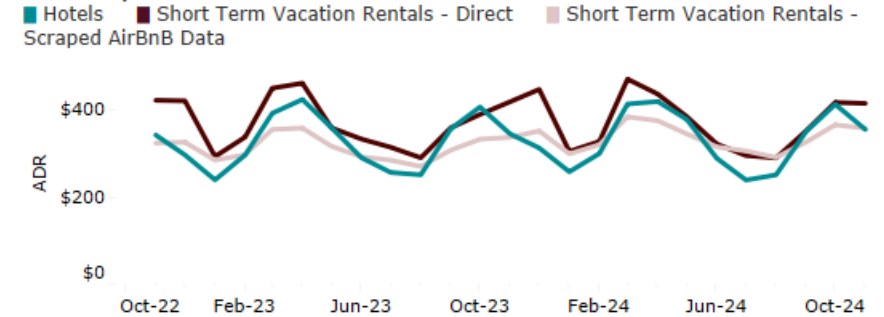
Source: KeyData (Vacation Area - City of Sedona)

	Occupancy	ADR	RevPAR	Revenue
Nov 2024	44.2%	\$357.38	\$158.04	\$10.4M
YOY % Change	-0.1% YOY	+6.1% YOY	+5.9% YOY	+18.3% YOY
Calendar Year-to-Date	39.1%	\$341.90	\$133.76	\$96.9M
YTD YOY % Change	+1.3% YOY	+7.3% YOY	+8.7% YOY	+29.8% YOY

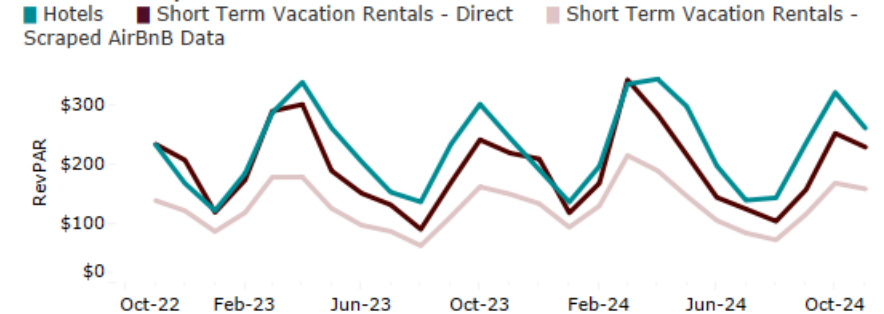
Occupancy by Month



ADR by Month



RevPAR by Month





Sedona+ Hotel Performance

Calendar Year-to-Date Performance
compared to last year

Occupancy	ADR	RevPAR	Supply	Demand	Revenue
69.2%	\$342	\$237	780.1K	540.0K	\$184.6M
+3.9%	+1.7%	+5.7%	+0.3%	+4.2%	+6.0%

Monthly Performance

	OCC	% CHG	ADR	% CHG	RevPAR	% CHG
Sep	67.3%	+2.9%	\$350	-1.7%	\$236	+1.1%
Oct	77.7%	+5.0%	\$412	+1.5%	\$321	+6.6%
Nov	73.4%	+3.8%	\$355	+2.9%	\$260	+6.9%

Village of Oak Creek+ Hotel Performance

Calendar Year-to-Date Performance
compared to last year

Occupancy	ADR	RevPAR	Supply	Demand	Revenue
64.8%	\$206	\$134	259.9K	168.4K	\$34.7M
-2.9%	-4.4%	-7.3%	-0.1%	-3.1%	-7.4%

Monthly Performance

	OCC	% CHG	ADR	% CHG	RevPAR	% CHG
Sep	64.4%	-3.0%	\$198	-5.8%	\$128	-8.6%
Oct	73.0%	-5.2%	\$234	-3.9%	\$171	-8.8%
Nov	67.1%	-0.3%	\$207	-5.0%	\$139	-5.3%

Short Term Rental Review OTA AirBNB

November 2024



City of Sedona Performance

Calendar Year-to-Date Performance
compared to last year

Occupancy	ADR	RevPAR
39.1%	\$342	\$134
+1.3%	+7.3%	+8.7%

Monthly Performance

	OCC	% CHG	ADR	% CHG	RevPAR	% CHG
Sep	35.4%	-2.2%	\$326	+6.0%	\$115	+3.7%
Oct	45.9%	-5.6%	\$366	+10.0%	\$168	+3.8%
Nov	44.2%	-0.1%	\$357	+6.1%	\$158	+5.9%

Greater Sedona Performance

Calendar Year-to-Date Performance
compared to last year

Occupancy	ADR	RevPAR
38.2%	\$319	\$122
+0.6%	+7.1%	+7.7%

Monthly Performance

	OCC	% CHG	ADR	% CHG	RevPAR	% CHG
Sep	34.7%	-3.4%	\$304	+5.4%	\$105	+1.8%
Oct	44.3%	-8.1%	\$341	+10.4%	\$151	+1.4%
Nov	42.2%	-1.9%	\$332	+6.2%	\$140	+4.2%

Village of Oak Creek Performance

Calendar Year-to-Date Performance
compared to last year

Occupancy	ADR	RevPAR
35.0%	\$251	\$88
-0.4%	+4.2%	+3.8%

Monthly Performance

	OCC	% CHG	ADR	% CHG	RevPAR	% CHG
Sep	32.5%	-4.7%	\$237	+0.5%	\$77	-4.3%
Oct	40.4%	-12.9%	\$265	+6.2%	\$107	-7.5%
Nov	36.2%	-8.8%	\$252	+3.5%	\$91	-5.6%

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

Visitor Spending

November 2024



Visitor Credit Card Spending

November 2024 Card Spend

\$8.2M

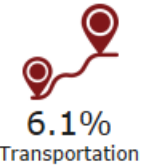
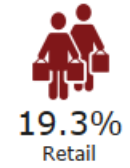
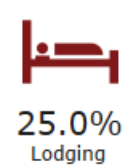
+8.2% YOY

Jan - Nov 2024 Card Spend

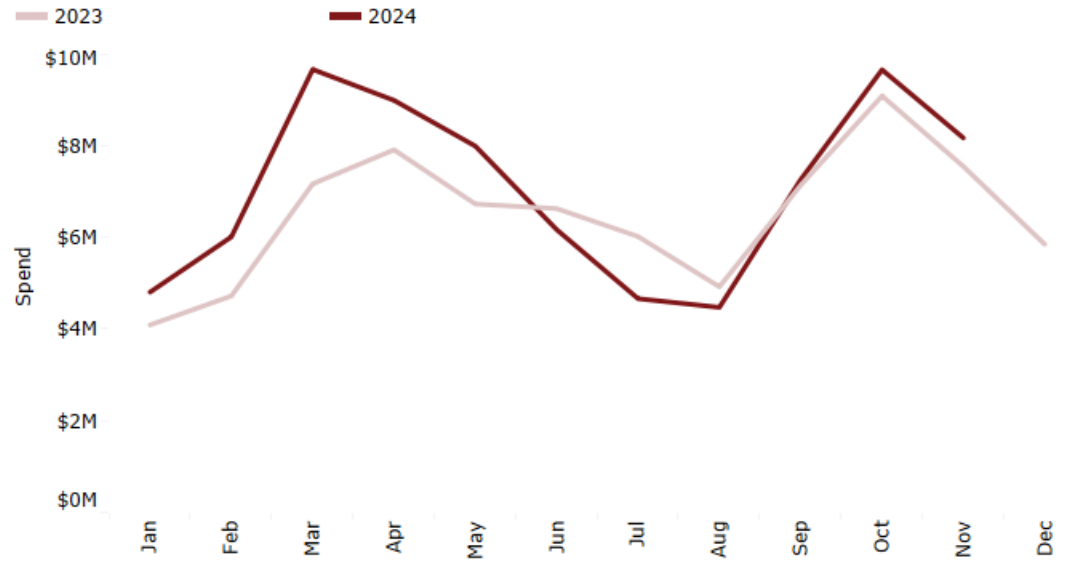
\$77.8M

+8.2% YOY

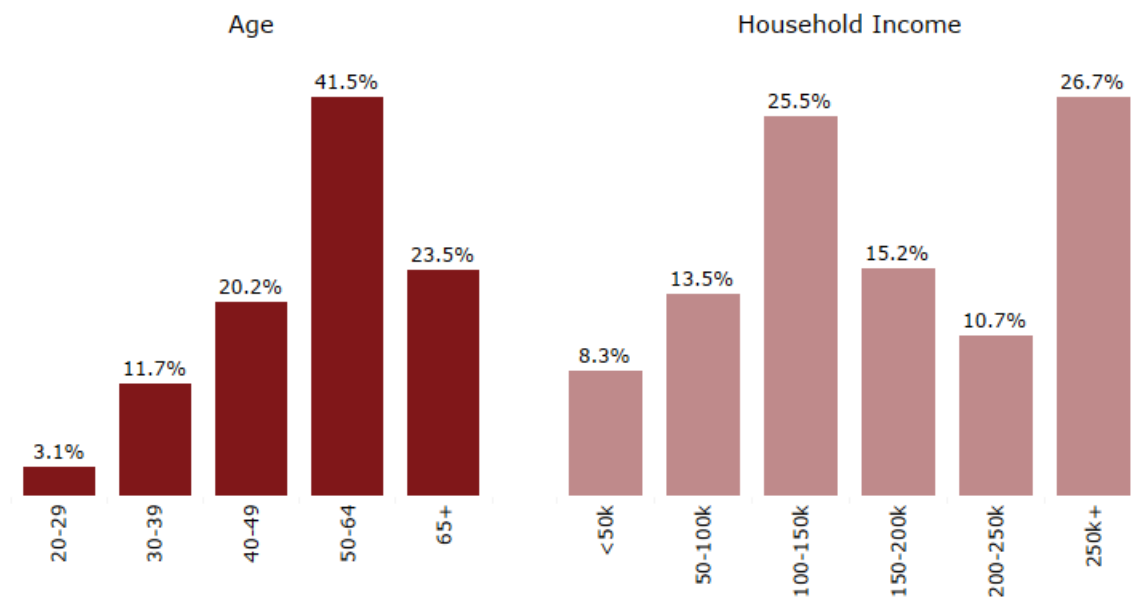
November 2024 Visitor Credit Card Spending



Visitor Spending Trend



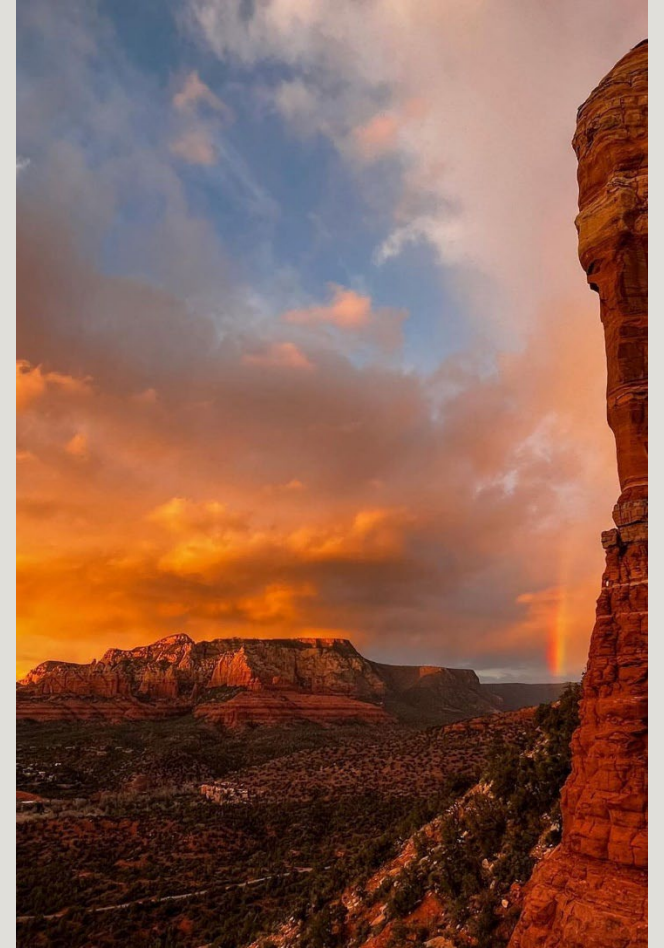
Spending by Demographic



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

Go West Summit Recap

- Overview
 - 52 appointments
 - Domestic and international
 - Mix of travel agents, motorcoach, wholesalers, and media
- Key Takeaways
 - Already seeing the value of building buyer relationships
 - Definite opportunity to build out international FIT during summer



FAM Updates

January

- Mauri Elbel, *Austin Travels Magazine*
- Cali'fun, *French travel agent*
- Lexy Troth, *content creator*
- WM Millwork, *MICE site visit*
- CANUSA, *German travel agent*
- Free Spirit Vacations, *group tours*
- French Travel Agents

March/April/August

- Australia & New Zealand travel agents
- 2025 TravelCon pre-conference FAM
- ADAC Reisen, *German Travel Agent*
- Travel Counsellors, *UK Travel Agent*



A dramatic landscape of layered, reddish-brown rock formations under a blue sky. The rock faces are steep and show clear horizontal strata. The lighting is bright, creating strong shadows and highlights on the rock surfaces. The overall color palette is dominated by the warm tones of the rock and the cool blue of the sky. The text 'Winter Campaign Update' is overlaid in a clean, white, sans-serif font, centered horizontally across the middle of the image.

Winter Campaign Update

Redefine Family Time



Learn More.



Redefine Road Trip



Learn More.



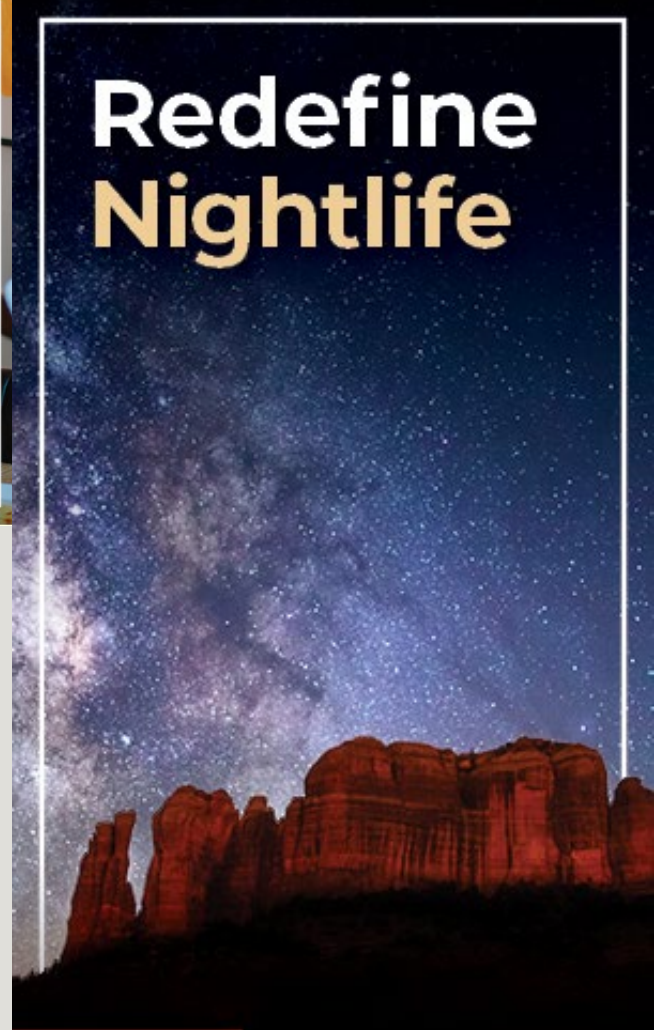
Redefine Hospitality



Learn More.



Redefine Nightlife



Learn More.



Redefine Your Winter



Learn More.



TOURISM PROGRAM



Redefine Girls trip





Redefine Mindfulness

Play (k)

0:09 / 0:30

CC Settings Full Screen

DECEMBER – KEY TAKEAWAYS

Datify Campaign: Delivered 1.9M impressions and generated 3,126 clicks with a ROAS of 11:1.

- Campaign progress shows strong revenue impact, indicating the platform's efficiency in targeting the right audience.

Website Traffic: Achieved a 328% year-over-year increase in web traffic, significantly boosting site visibility.

- The campaign efficiently attracted quality traffic, showcasing the impact of targeted keyword strategies.

Paid Search Campaign: Generated 312,070 impressions and 7,597 clicks with a cost-efficient CPC of \$0.35.

- Progress reflects steady traffic generation and a strong focus on cost efficiency in paid search efforts.

Meta Campaign Total: Delivered 1.28M impressions, driving 25,508 clicks at a CPC of \$0.49.

- Campaign progress indicates effective audience engagement and strong click volume, contributing to website traffic growth.

Meta Campaign (Out of Market): Delivered 723,644 impressions and drove 15,507 clicks with a CTR of 2.14% and a low CPC of \$0.44.

- Outperformed the In-Market campaign in both impressions and click volume, which makes sense for a visitation campaign vs a stewardship campaign.

Meta Campaign (In Market): Achieved 467,508 impressions, generating 8,068 clicks with a CTR of 1.73% and a CPC of \$0.64.

- Although slightly less efficient in cost and engagement, this campaign maintained a focused presence in the core market, likely driving higher-intent traffic.

DECEMBER UPDATE

DATAFY CAMPAIGN

Click-through-rate: 0.16%
Impressions: 1,918,710
Clicks: 3,126
ROAS: **11:1**

Benchmark Click-through-rate: 0.18%

PAID SEARCH CAMPAIGN

Click-through-rate: 2.43%
Impressions: 312,070
Clicks: 7,597
CPC: \$0.35

Benchmark Click-through-rate: 4.68%
Benchmark Cost-per-click: \$1.53

WEBSITE TRAFFIC

We are seeing **328%** increase in web traffic year-over-year.

META CAMPAIGN (TOTAL)

Click-through-rate: 1.99%
Impressions: 1,284,191
Clicks: 25,508
CPC: \$0.49

Benchmark Click-through-rate: 0.90%
Benchmark Cost-per-click: \$0.63

TOP PERFORMING CREATIVES



Next Steps

- This winter campaign runs through February 28
- We should have our first month of attribution reporting during the coming days
- We'll look to shift investments towards higher performing markets

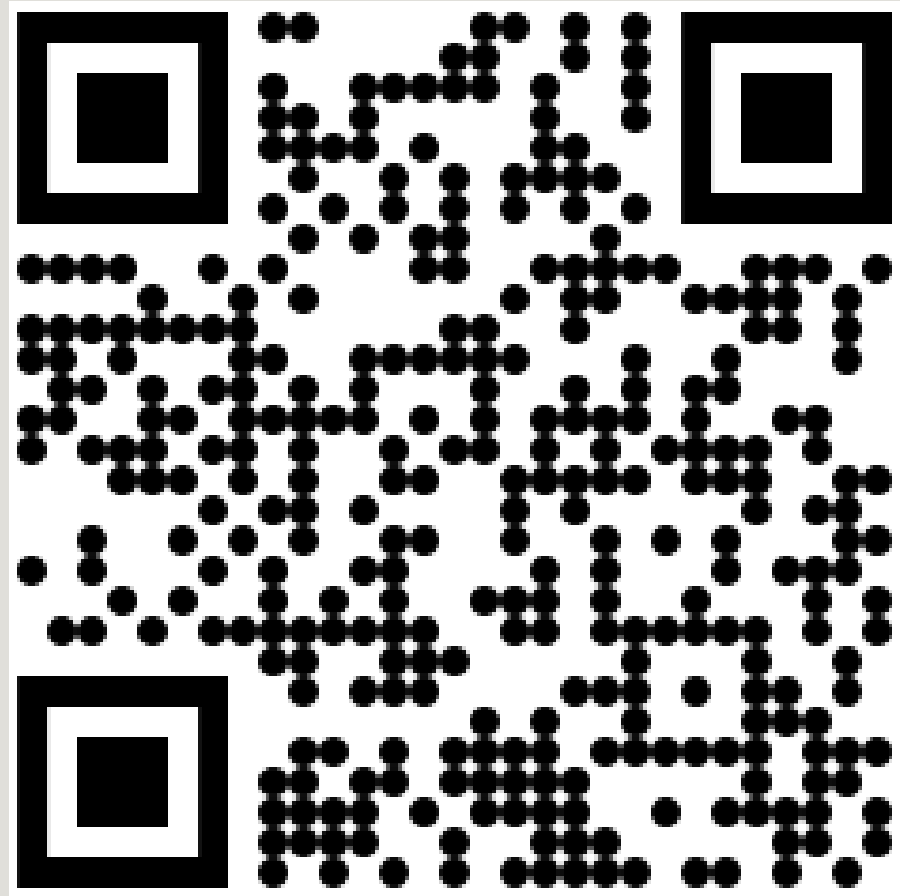


Industry Opportunities

- Become a [HelmsBriscoe Hotel Partner](#)
- Travel + Leisure opportunity to give back to those impacted by LA wildfires



Sedona Tourism Industry Newsletter



TOURISM PROGRAM

THANK YOU

