



CITY OF SEDONA
TOURISM PROGRAM
TAB Update

BUDGET

Current Fiscal Year (2024)

At a high level:

- Destination marketing campaigns: potentially \$200,000 – maybe more, maybe less
- Other marketing: \$140,000 - \$35,000 (AOT), \$90,000 (transit marketing services), \$19,000 (ATI, Saks, Sedona NOW)
- Other AOT Co-op funds: \$13,000
- Staff and consultant salaries and benefits: \$433,000
- Memberships: \$3,500
- Visitors Center: \$424,000
- Data: \$190,000
- Strategic Plan: \$74,000
- Tourism program software: \$38,000
- DVA: \$281,000 (won't be spent all in this year)
- There will be savings in salary and benefits and DVA that will keep us in budget
- Total: approximately \$1.6 million



TOURISM PROGRAM

BUDGET

Upcoming Fiscal Year (2025)

At a high level:

- Destination marketing campaigns: \$350,000 – does not include creative
- Other marketing: \$200,000 - \$35,000 (AOT); \$100,000 in transit marketing fees and marketing; \$20,000 in video placement: LILAL, roundabout and transit videos on local channels; \$20,000 in misc. marketing, \$25,000 in Visitors Guide
- Travel trade/media: \$100,000 - hosting funds of \$50,000, destination gifts \$20,000, travel \$30,000
- Membership fees: \$10,000
- Other AOT matching funds: \$15,000
- Staff salaries and consultants and benefits: \$602,000 (4 coordinators + 1 manager + consultant)
- Visitors Center: \$350,000 placeholder but this is TBD
- Data: \$103,000
- Tourism program software: \$80,200
- DVA: \$154,000 (their contract – research)
- Creative: \$85,000
- Total: approximately \$2 million

TOURISM PROGRAM



Hotel Performance Summary

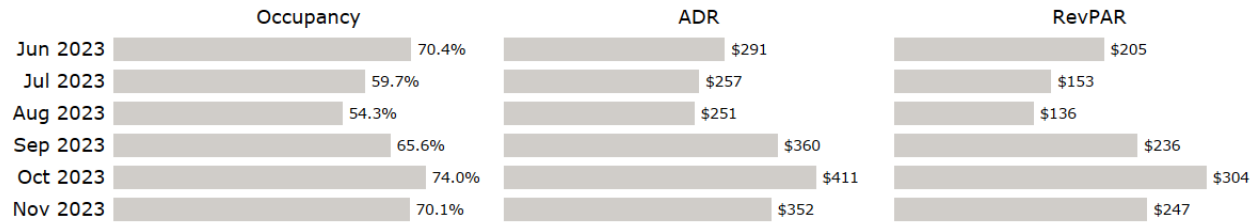
Sedona+ | November 2023



Month: November 2023 | Location: Sedona+ | Compare to: Previous Year | Year Type: Calendar Year

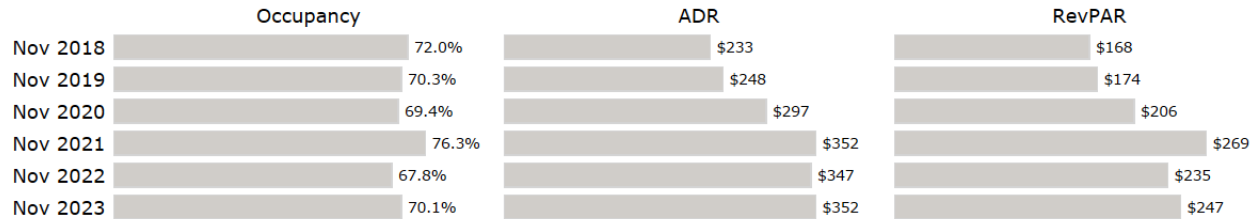
	Occupancy	ADR	RevPAR	Supply	Demand	Revenue
	70.1%	\$351.57	\$246.57	64.8K	45.5K	\$16.0M
Change vs. Previous Year	▲ 3.4%	▲ 1.4%	▲ 4.9%	▲ 3.0%	▲ 6.5%	▲ 8.0%
YTD Calendar Year	66.7%	\$338.75	\$225.98	719.4K	479.9K	\$162.6M
YTD Change vs. Previous Year	▲ 1.6%	▼ -5.5%	▼ -4.0%	▲ 2.7%	▲ 4.4%	▼ -1.4%

Last Six Months Performance

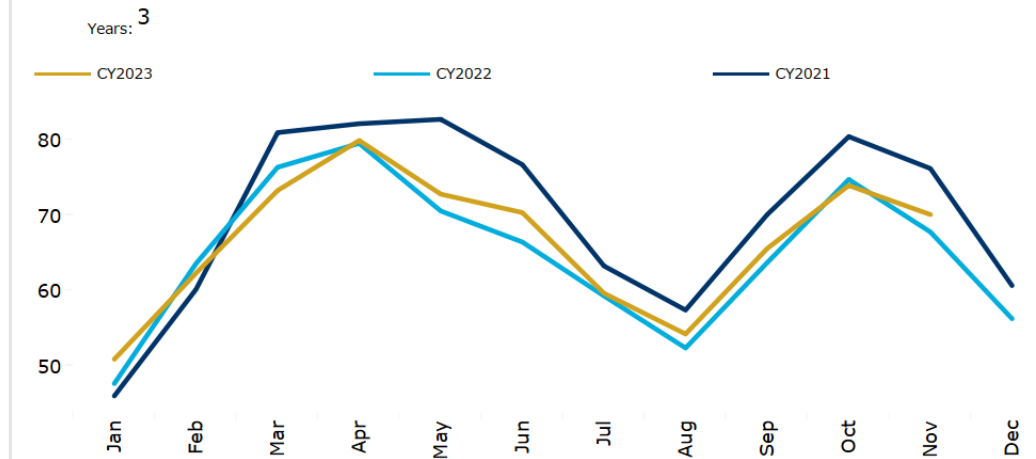


November Performance by Year

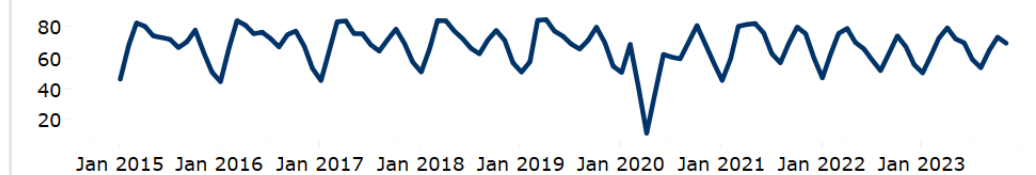
Sedona+



Occupancy YOY Comparison



Occupancy Long Term Trend



Hotel Performance Summary

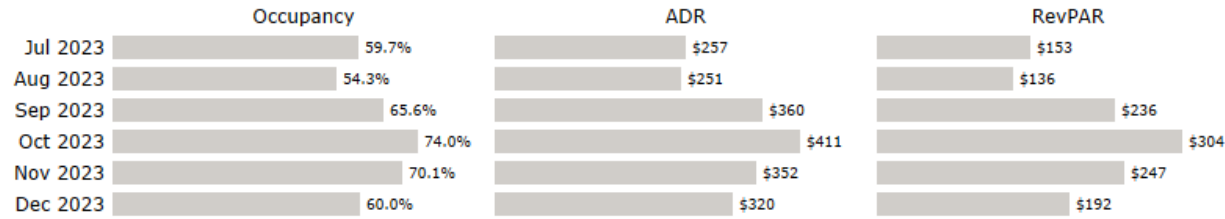
Sedona+ | December 2023



Month: December 2023 | Location: Sedona+ | Compare to: Previous Year | Year Type: Calendar Year

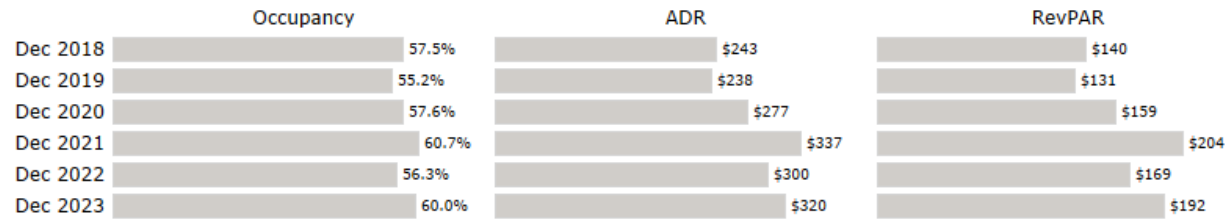
	Occupancy	ADR	RevPAR	Supply	Demand	Revenue
	60.0%	\$319.55	\$191.58	67.0K	40.2K	\$12.8M
Change vs. Previous Year	▲ 6.5%	▲ 6.5%	▲ 13.3%	▲ 3.0%	▲ 9.7%	▲ 16.7%
YTD Calendar Year	66.1%	\$337.27	\$223.05	786.4K	520.1K	\$175.4M
YTD Change vs. Previous Year	▲ 2.0%	▼ -4.8%	▼ -2.9%	▲ 2.7%	▲ 4.8%	▼ -0.3%

Last Six Months Performance

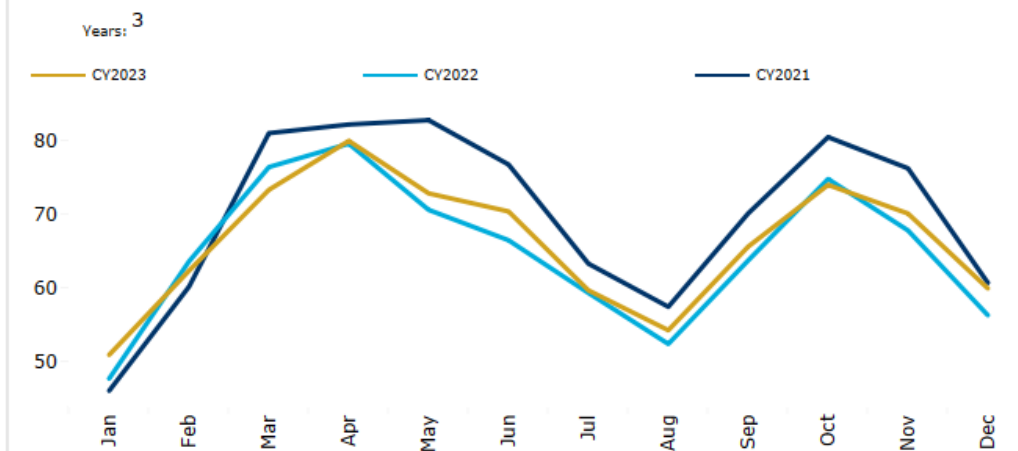


December Performance by Year

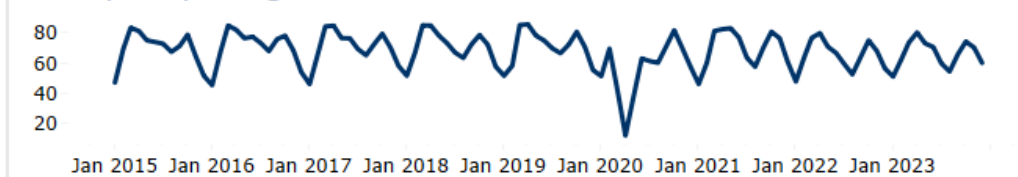
Sedona+



Occupancy YOY Comparison



Occupancy Long Term Trend





Sedona+ Lodging Summary

December 2023



Aggregated Lodging Summary

Source: STR & KeyData

	Occupancy	ADR	RevPAR
Dec 2023	42.2%	\$330.34	\$139.55
% Change vs. Dec 2022	-2.8%	2.0%	-0.8%
% Change vs. Nov 2023	-7.2%	1.4%	-5.9%
CYTD 2023	45.5%	\$328.86	\$149.69
% Change vs. CYTD 2022	-10.0%	0.1%	-10.0%

Hotel Performance (Sedona+)

Source: STR

	Occupancy	ADR	RevPAR
Dec 2023	60.0%	\$319.55	\$191.58
% Change vs. Dec 2022	6.5%	6.5%	13.3%
% Change vs. Nov 2023	-14.5%	-9.1%	-22.3%
CYTD 2023	66.1%	\$337.27	\$223.05
% Change vs. CYTD 2022	2.0%	-4.8%	-2.9%

Short Term Lodging (Vacation Area - City of Sedona)

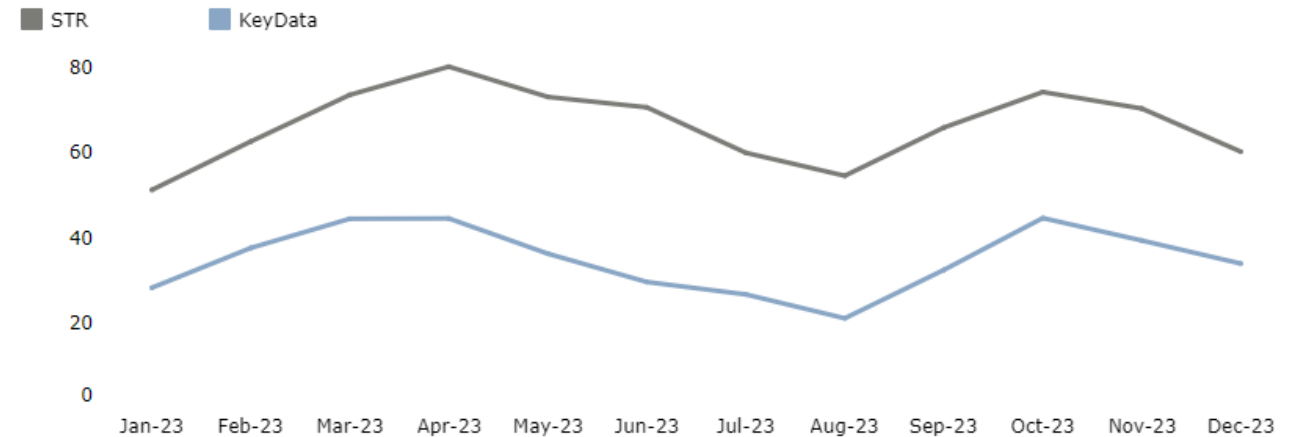
Source: KeyData

	Occupancy	ADR	RevPAR
Dec 2023	33.6%	\$339.75	\$114.14
% Change vs. Dec 2022	-1.7%	1.0%	-0.6%
% Change vs. Nov 2023	-13.9%	3.8%	-10.7%
CYTD 2023	34.5%	\$320.23	\$110.42
% Change vs. CYTD 2022	-11.5%	1.2%	-10.4%

Sources: STR and KeyData

Occupancy (Hotels: Sedona+; KeyData: Vacation Area - City of Sedona)

Last 12 Months

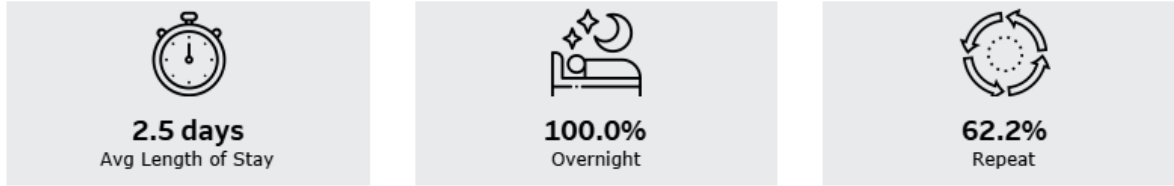


Domestic Visitors: Greater Sedona Area

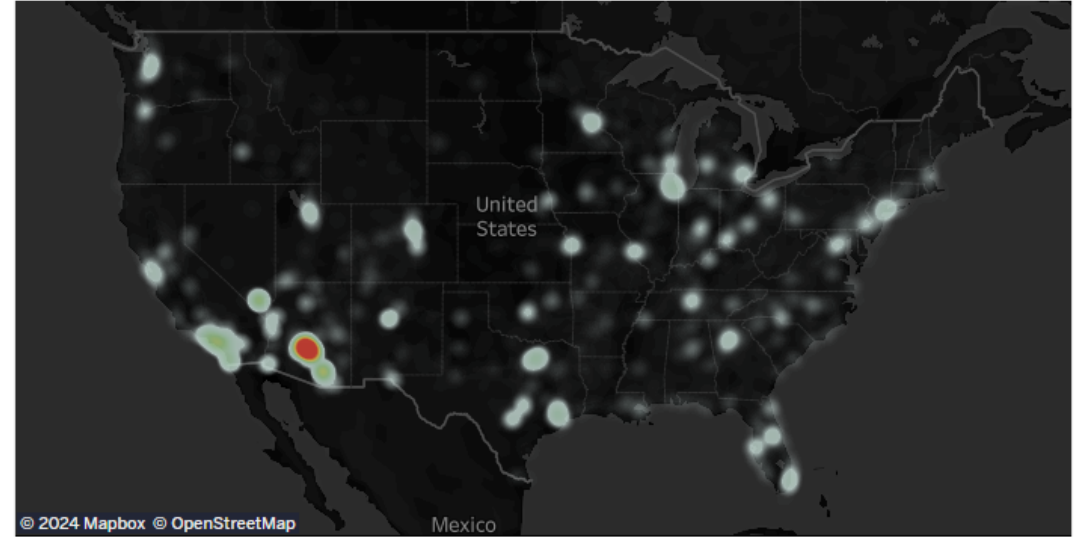


Study Geography:
 Start Date:
 End Date:
 Trip Type:
 Weekend/Weekday Trips:

Sample Size: 25,687

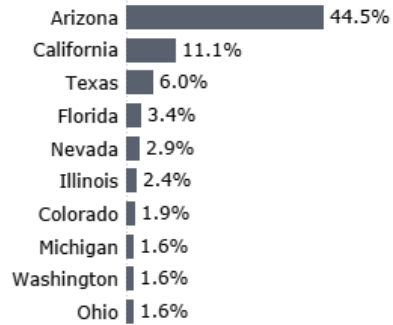


US Mainland Origin Heat Map



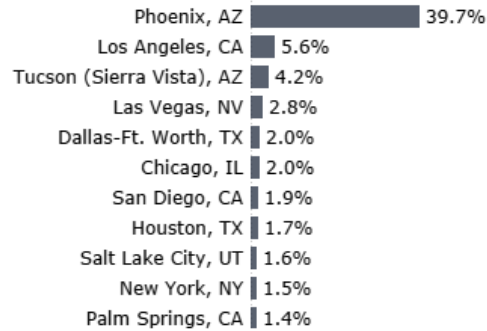
Top Visitor Origin States

% share of total



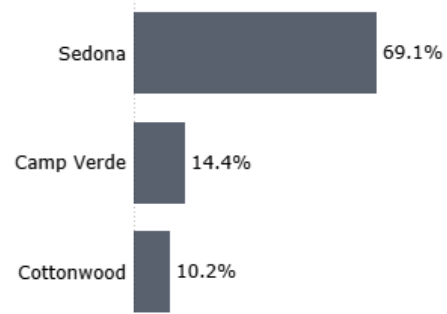
Top Visitor Origin DMAs

% share of total



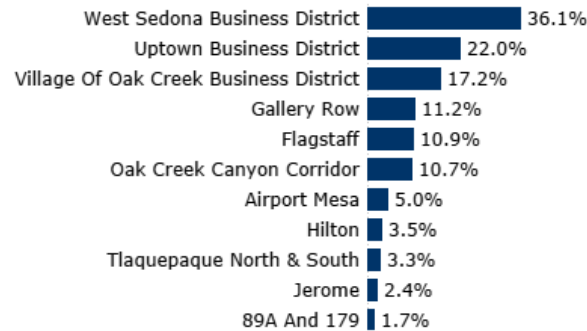
Cross Visits

% share of visitors

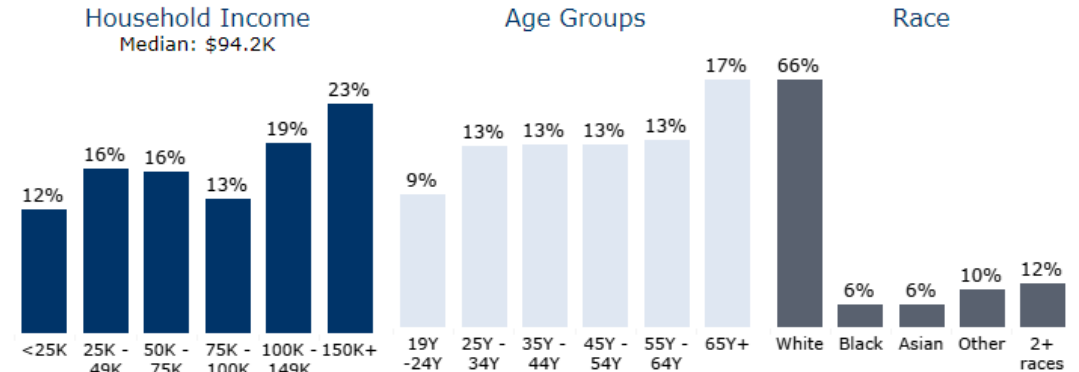


Top POIs Visited

% share of trips



Demographic Estimates



Source: Near & US Census Bureau

Domestic Visitors: Sedona



Study Geography: Sedona | Start Date: January 01, 2023 | End Date: December 31, 2023 | Trip Type: Overnight | Weekend/Weekday Trips: (All)

Sample Size: 143,472



2.1 days
Avg Length of Stay



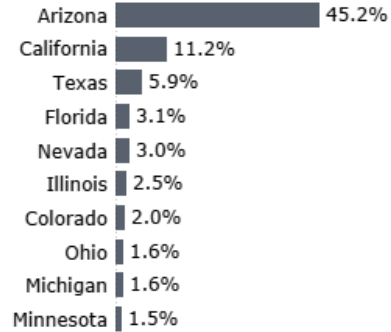
100.0%
Overnight



27.4%
Repeat

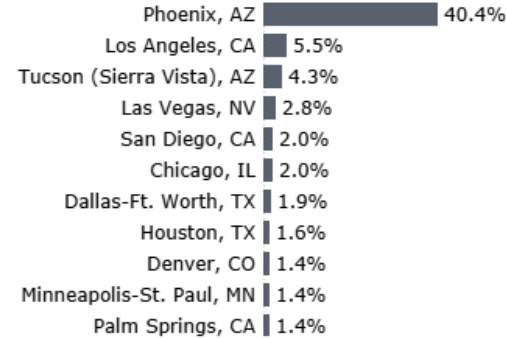
Top Visitor Origin States

% share of total

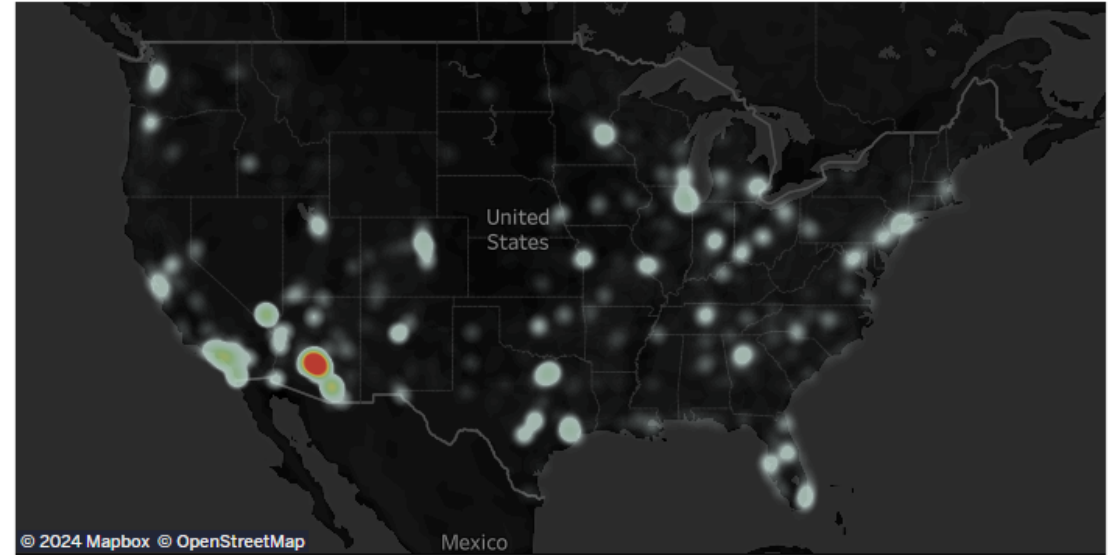


Top Visitor Origin DMAs

% share of total

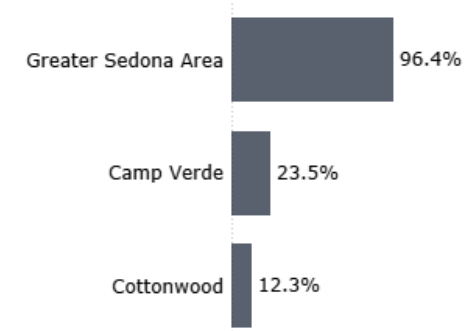


US Mainland Origin Heat Map



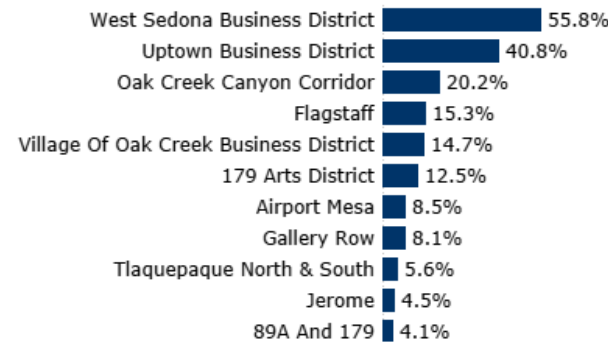
Cross Visits

% share of visitors



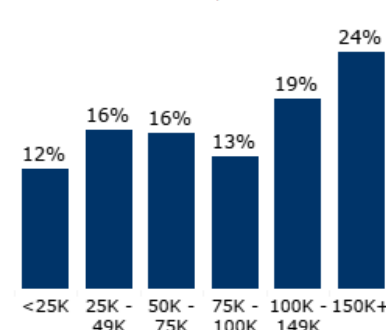
Top POIs Visited

% share of trips

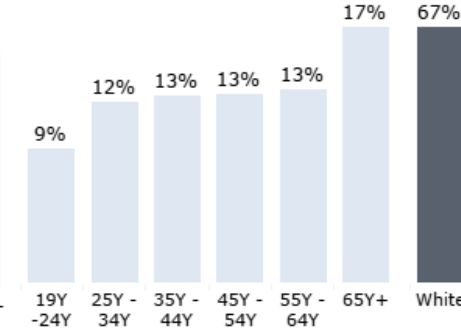


Demographic Estimates

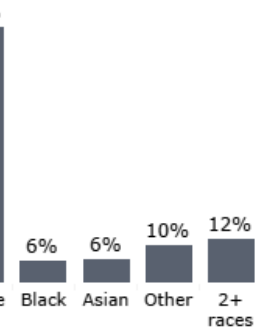
Household Income
Median: \$96.3K



Age Groups



Race



Source: Near & US Census Bureau

International Visitors: Sedona



Sample Size: 718

Study Geography

Sedona

Start Date

January 01, 2023

End Date

December 31, 2023



2.5 days

Avg Length of Stay



77.7%

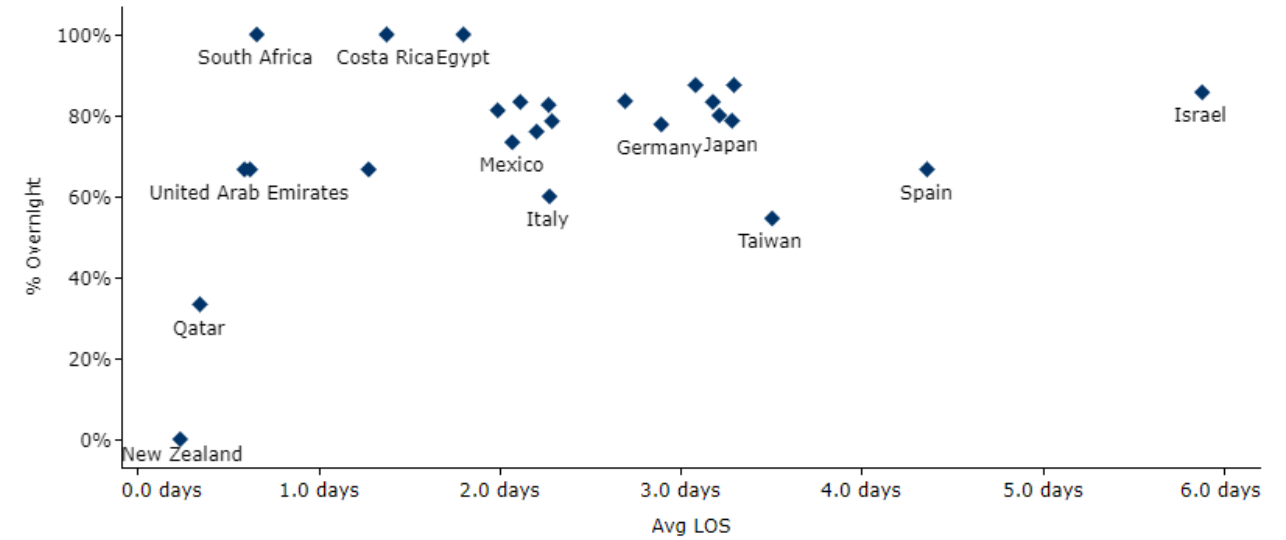
Overnight

Top International Markets

	% Overnight	Avg LOS
Mexico	73.4%	2.1 days
Canada	83.5%	2.7 days
Japan	78.7%	3.3 days
United Kingdom	81.3%	2.0 days
Saudi Arabia	76.0%	2.2 days
Indonesia	83.3%	3.2 days
South Korea	82.6%	2.3 days
Brazil	87.5%	3.1 days
France	87.5%	3.3 days
Australia	78.6%	2.3 days
Taiwan	54.5%	3.5 days
Germany	77.8%	2.9 days
Israel	85.7%	5.9 days
Netherlands	83.3%	2.1 days
Italy	60.0%	2.3 days
Philippines	80.0%	3.2 days
Czechia	66.7%	0.6 days
Malaysia	66.7%	1.3 days
New Zealand	0.0%	0.2 days
Qatar	33.3%	0.3 days
South Africa	100.0%	0.7 days
Spain	66.7%	4.4 days
United Arab Emirates	66.7%	0.6 days

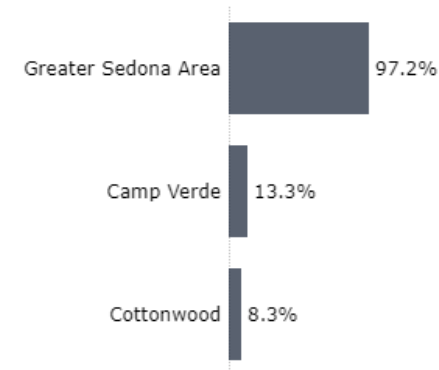
Top Visitor Origin

% Share of Total



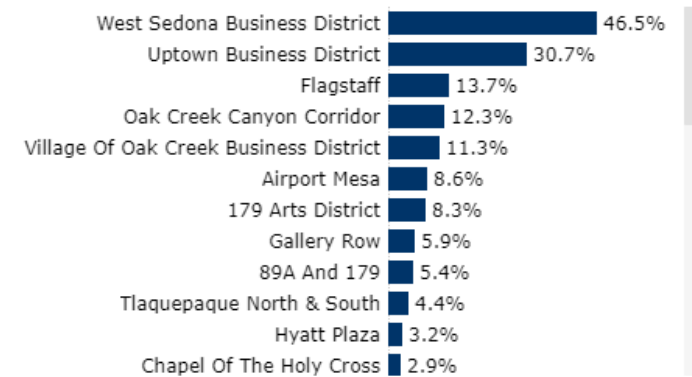
Cross Visits

% share of visitors



Top POIs Visited

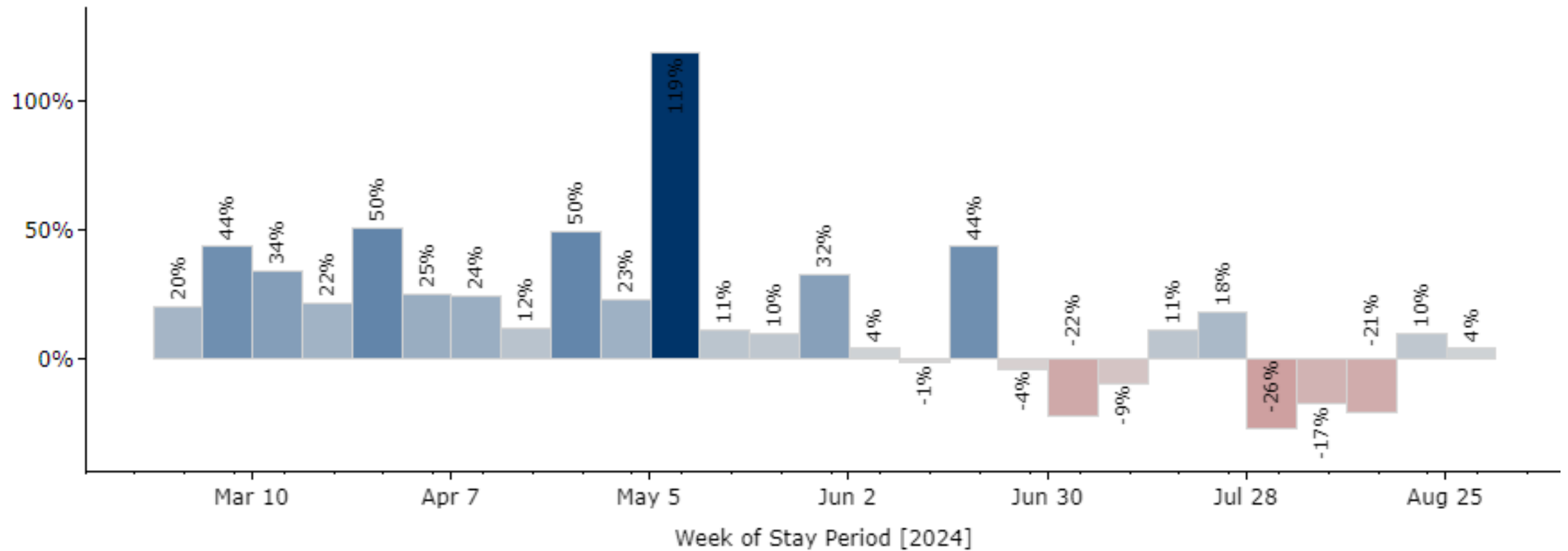
% Share of Visitors



Source: Near

Future hotel demand looks strong

Occupancy Outlook Compared to Same Time Last Year



Visit Sedona Spending Summary



Period: January - December 2023

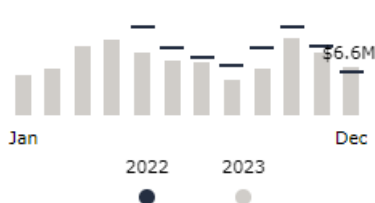
Month: Report Type:



\$90.9M

Card Spend

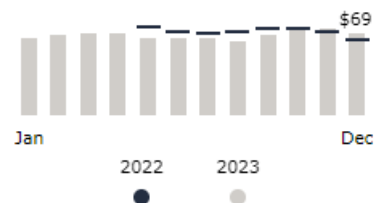
+23.2% vs. Previous Year



\$68

Spend per Transaction

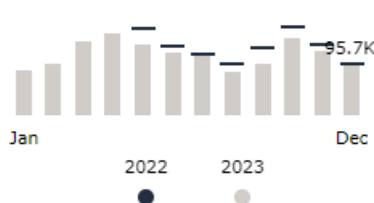
-6.5% vs. Previous Year



1.3M

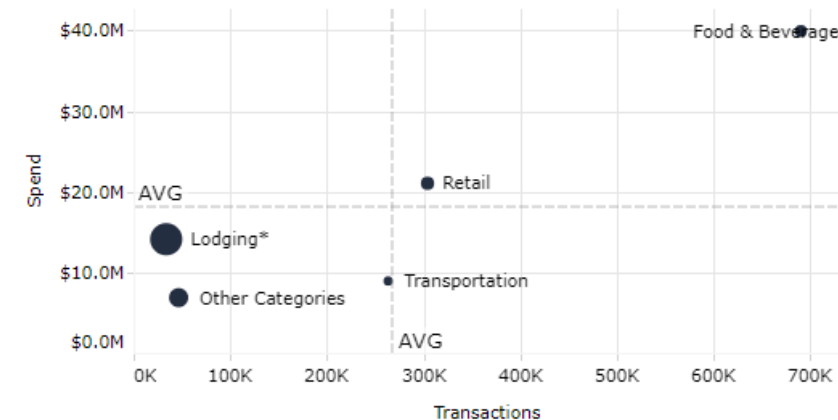
Transactions

+31.7% vs. Previous Year



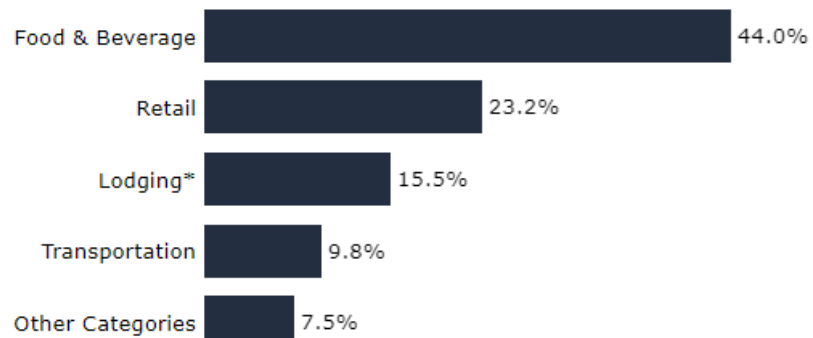
Transactions vs. Spend Amount

Size of bubble denotes spend per transaction

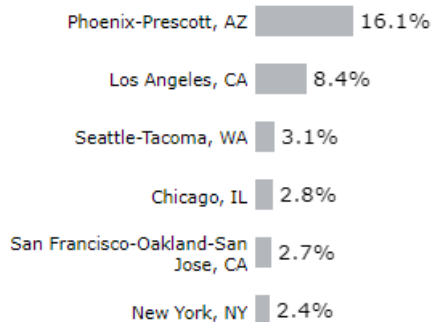


Spending Categories

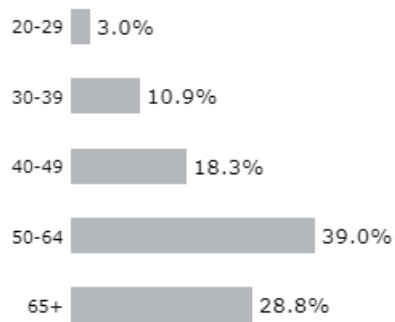
% Share of total in-market credit card spend



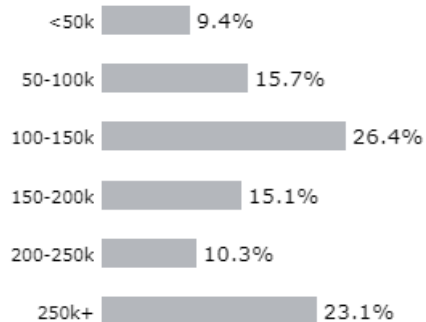
Top Origin DMAs



Spend Share by Age**



Spend Share by Income**



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