

# Tourism Advisory Board

Regular meeting

May 1, 2024

Staff Presentation



**TOURISM PROGRAM**

[www.ScenicSedona.com](http://www.ScenicSedona.com)

# Agenda

- Data overview
- Summer stewardship campaign
  - Concept review
  - Creative preview
- TAB roles



# Data Overview

## February and March 2024





# Tourism Market Indicators

March 2024

March was a good month for Sedona hotels illustrated by a +10.5% YOY increase in demand resulting in the same +10.5% YOY gain in occupancy to 81.1%. This is the third consecutive month this year where hotel occupancy has exceeded the prior three years. Short term lodging occupancy increased +23.2% YOY to 63.1%.

ADR also increased compared to last year by +7.2% YOY to \$422.23. The combined gains in demand and ADR generated a +18.5% YOY increase in revenue to \$22.9M for the month. ADR among short term lodging increased 9.9% to \$424 setting a new March record.

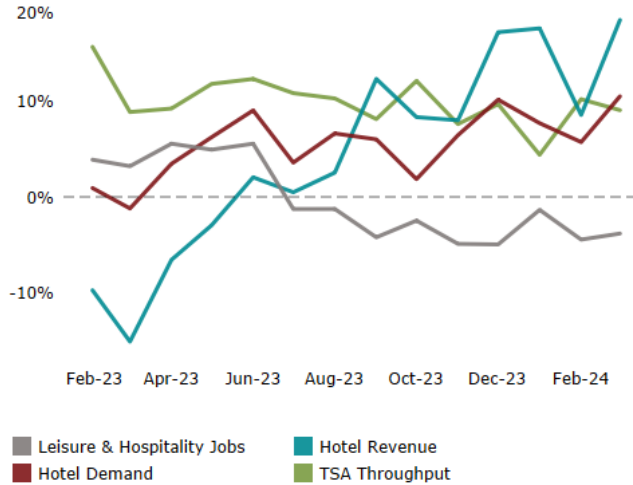
March performance of other key metrics was mixed with TSA throughput at PHX up +10.2% YOY but Leisure & Hospitality jobs down -3.8% YOY, though +0.7% more than in pre-pandemic March 2019. Recreation visits were the same as last year at 326.9K.

US Hotel performance reported mixed results: occupancy of 63.7% declined 2.5% YOY, ADR (\$159.79) inched ahead of last year by just +0.4%, and RevPAR of \$101.81 declined 2.2%. Occupancy for each month in 2024 has so far remained behind the previous year.

Leisure and hospitality employment reached pre-pandemic levels nationally for the first time, adding 49K jobs in March. Nationally, total nonfarm employment grew 303K in March over the previous month, growing at a faster pace than the average monthly gains of the last year (231K).

## Recovery Indicators

% change relative to same month of previous year



Powered by: **SYMPHONY** TOURISM ECONOMICS



**81.1%**  
Hotel Occupancy  
▲ 10.5% YOY



**\$22.93M**  
Hotel Revenue  
▲ 18.5% YOY



**2.1M**  
Airport Throughput  
▲ 10.1% YOY, ▲ 16.9% vs. 2019



**15.3K**  
Leisure and Hospitality Jobs  
▼ -3.8% YOY, ▲ 0.7% vs. 2019

Data Sources: STR, TSA, Bureau of Labor Statistics



# TOURISM PROGRAM

[www.ScenicSedona.com](http://www.ScenicSedona.com)



# Sedona+ Lodging Summary

March 2024



## Aggregated Lodging Summary

Source: STR & KeyData

	Occupancy	ADR	RevPAR	Supply	Demand	Revenue
Mar 2024	<b>67.7%</b>	<b>\$408.17</b>	<b>\$276.52</b>	<b>179.8K</b>	<b>121.8K</b>	<b>\$49.7M</b>
% Change vs. Mar 2023	15.0%	7.8%	24.0%	7.9%	24.1%	33.7%
% Change vs. Feb 2024	31.6%	29.1%	69.9%	9.7%	44.4%	86.4%
CYTD 2024	<b>53.0%</b>	<b>\$347.69</b>	<b>\$184.44</b>	<b>522.1K</b>	<b>277.0K</b>	<b>\$96.3M</b>
% Change vs. CYTD 2023	7.1%	6.9%	14.4%	12.4%	20.3%	28.6%

## Hotel Performance (Sedona+)

Source: STR

	Occupancy	ADR	RevPAR	Supply	Demand	Revenue
Mar 2024	<b>81.1%</b>	<b>\$422.23</b>	<b>\$342.22</b>	<b>67.0K</b>	<b>54.3K</b>	<b>\$22.9M</b>
% Change vs. Mar 2023	10.5%	7.2%	18.5%	0.0%	10.5%	18.5%
% Change vs. Feb 2024	22.9%	37.5%	69.0%	11.5%	37.0%	88.4%
CYTD 2024	<b>66.8%</b>	<b>\$343.30</b>	<b>\$229.27</b>	<b>194.1K</b>	<b>129.6K</b>	<b>\$44.5M</b>
% Change vs. CYTD 2023	7.2%	6.6%	14.3%	1.0%	8.3%	15.4%

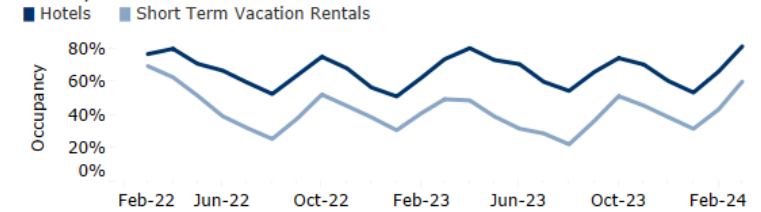
## Short Term Lodging (Vacation Area - City of Sedona)

Source: KeyData

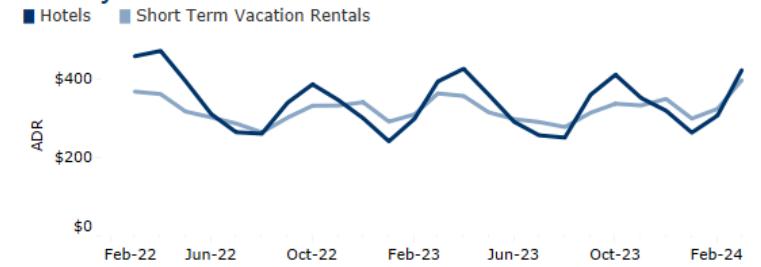
	Occupancy	ADR	RevPAR	Supply	Demand	Revenue
Mar 2024	<b>59.8%</b>	<b>\$396.86</b>	<b>\$237.50</b>	<b>112.8K</b>	<b>67.5K</b>	<b>\$26.8M</b>
% Change vs. Mar 2023	21.5%	9.2%	32.8%	13.2%	37.6%	50.3%
% Change vs. Feb 2024	38.8%	22.4%	69.9%	8.7%	50.9%	84.7%
CYTD 2024	<b>44.9%</b>	<b>\$351.55</b>	<b>\$157.91</b>	<b>328.0K</b>	<b>147.3K</b>	<b>\$51.8M</b>
% Change vs. CYTD 2023	10.8%	6.9%	18.4%	20.4%	33.4%	42.5%

Sources: STR and KeyData

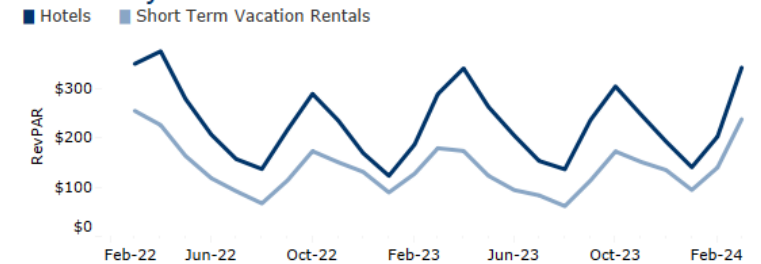
## Occupancy by Month (Hotels: Sedona+; KeyData: Vacation Area - City of Sedona)



## ADR by Month



## RevPAR by Month



SYMPHONY TOURISM ECONOMICS





# Domestic Visitors: Sedona



Study Geography  
Sedona

Start Date  
March 01, 2024

End Date  
March 31, 2024

Trip Type  
Overnight

Weekend/Weekday Trips  
All

Sample Size: 20,750



**2.6 days**  
Avg Length of Stay



**100.0%**  
Overnight

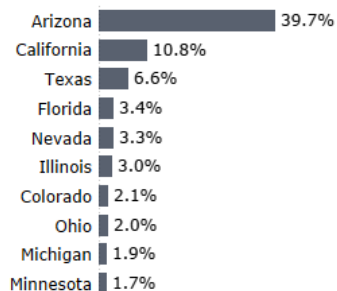


**67.2%**  
Repeat



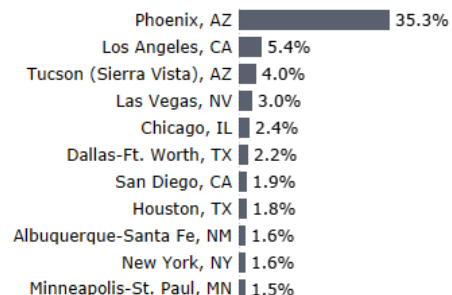
## Top Visitor Origin States

% share of total

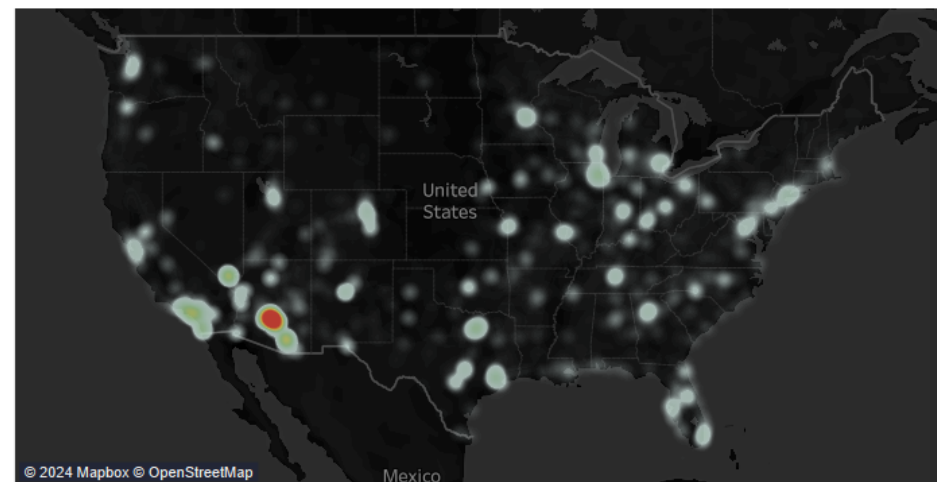


## Top Visitor Origin DMAs

% share of total

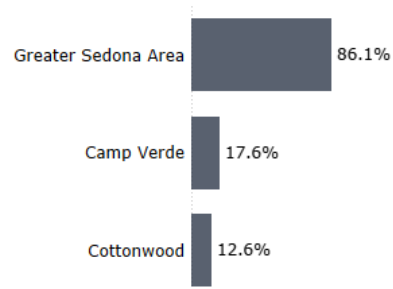


## US Mainland Origin Heat Map



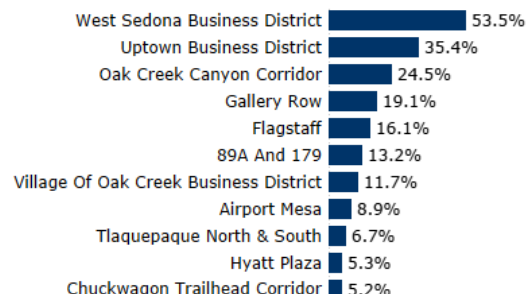
## Cross Visits

% share of visitors



## Top POIs Visited

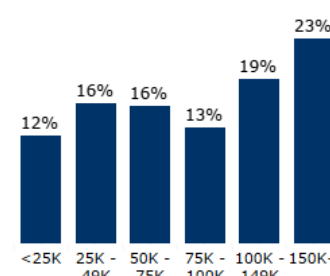
% share of trips



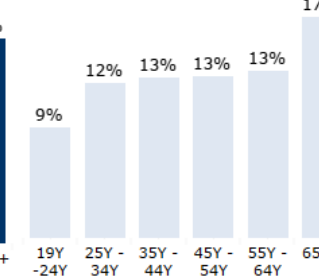
## Demographic Estimates

### Household Income

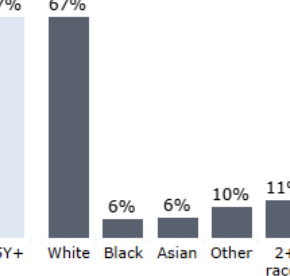
Median: \$95.7K



### Age Groups



### Race



Source: Near & US Census Bureau

SYMPHONY TOURISM ECONOMICS



# TOURISM PROGRAM

[www.ScenicSedona.com](http://www.ScenicSedona.com)

# Sedona Spending Summary

Period: February 2024



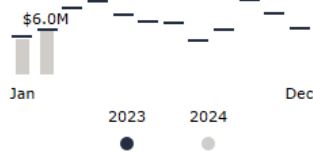
Month  
February 2024

Report Type  
Month



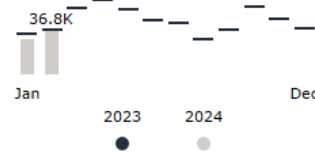
**\$6.0M**  
Card Spend

-4.7% vs. Previous Year



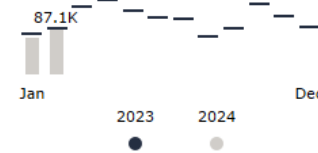
**36.8K**  
Cardholders

-7.2% vs. Previous Year



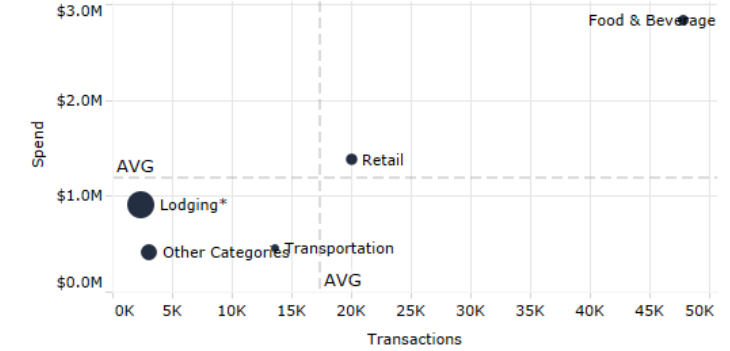
**87.1K**  
Transactions

-5.6% vs. Previous Year

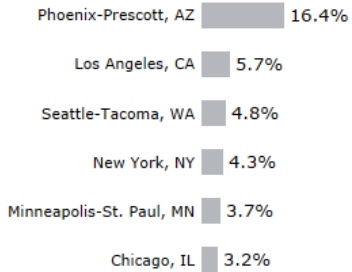


## Transactions vs. Spend Amount

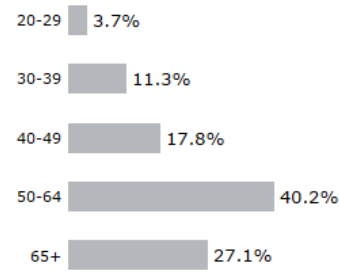
Size of bubble denotes spend per transaction



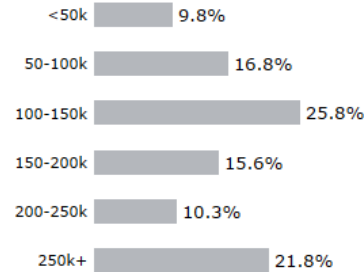
### Top Origin DMAs



### Spend Share by Age\*\*

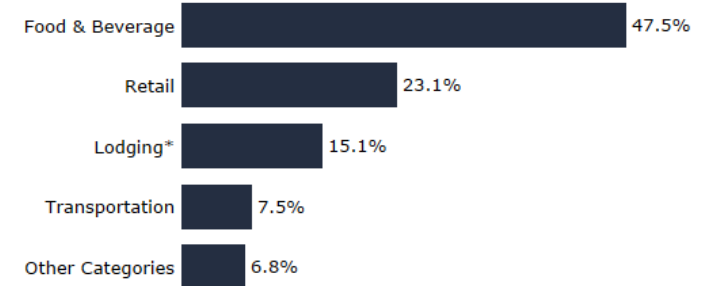


### Spend Share by Income\*\*



## Spending Categories

% Share of total in-market credit card spend



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

SYMPHONY TOURISM ECONOMICS



# TOURISM PROGRAM

www.ScenicSedona.com



# Booking Pace Trend

Sedona as of Apr 24, 2024

Month of Stay  
May 2024

Additional Months  
6

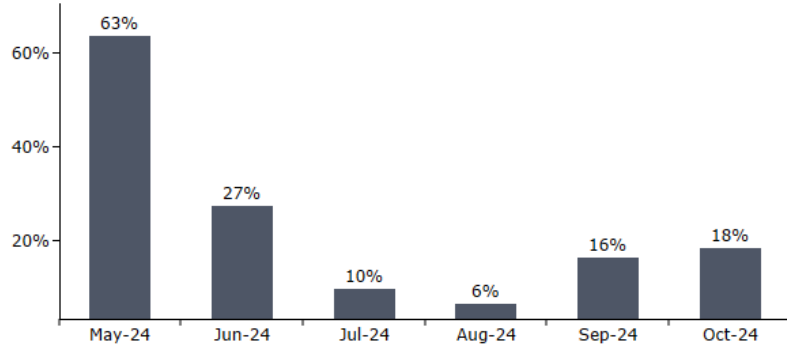
Total Segment  
Total with Group Committed

Focus Market  
Sedona

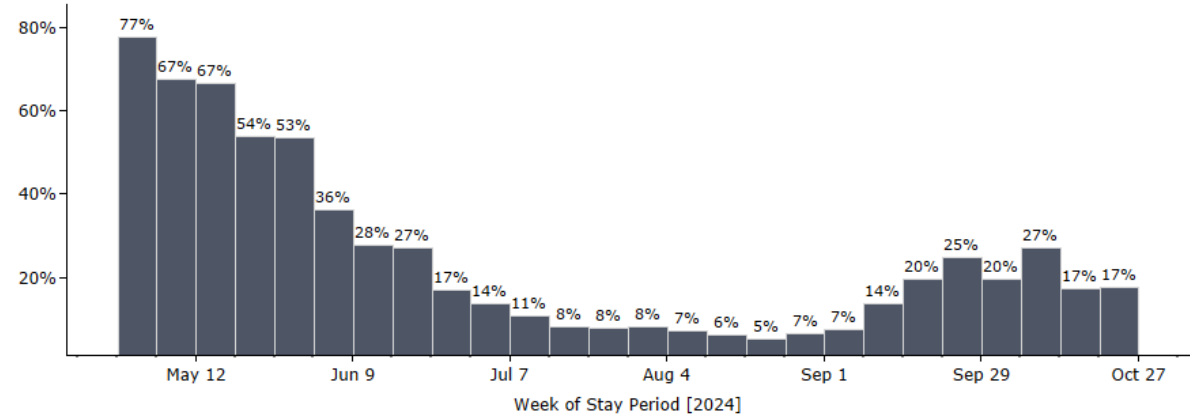
As Of Date  
Apr 24, 2024

## Future Occupancy Outlook

Occupancy for Sedona as of Apr 24, 2024 | Segment: Total with Group Committed



## Occupancy Outlook by Week



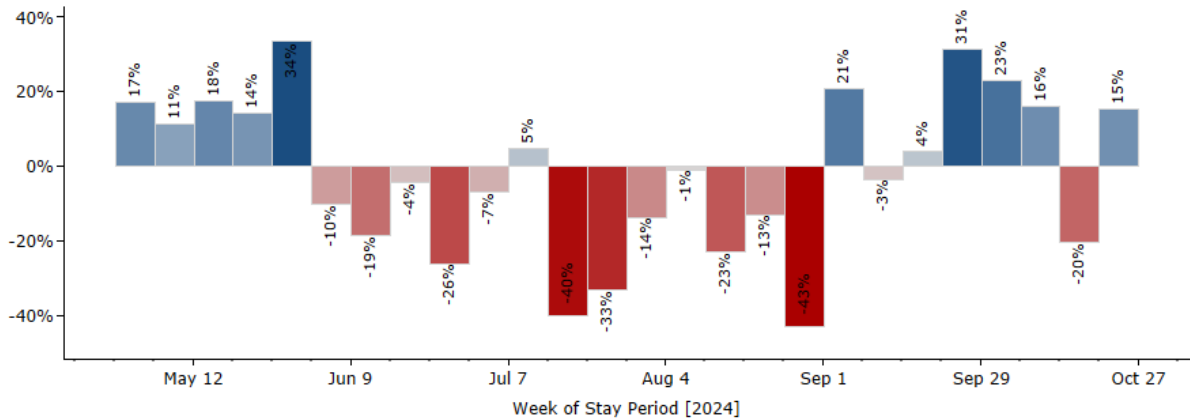
## Bookings

Segment	May-24	Jun-24	Jul-24	Aug-24	Sep-24	Oct-24
Transient	15.3K	6.7K	2.6K	1.6K	2.7K	2.5K
Group	2.8K	477	7	44	324	271
Group Committed	2.8K	859	176	212	1.9K	2.8K
Total	18.0K	7.1K	2.6K	1.6K	3.0K	2.7K
Total with Group Committed	18.1K	7.5K	2.8K	1.8K	4.5K	5.3K

## Bookings Compared to Same Time Last Year

Segment	May-24	Jun-24	Jul-24	Aug-24	Sep-24	Oct-24
Transient	16.2%	-5.0%	-3.2%	-0.6%	38.9%	33.4%
Group	59.7%	-4.6%	-93.5%	-37.1%	77.0%	-47.4%
Group Committed	47.9%	-42.8%	-75.6%	-72.0%	-5.4%	-18.2%
Total	21.2%	-5.0%	-6.5%	-2.1%	42.1%	15.7%
Total with Group Committed	20.1%	-11.7%	-18.5%	-23.5%	16.2%	-0.2%

## Occupancy Outlook Compared to Same Time Last Year



Source: TravelClick

SYMPHONY TOURISM ECONOMICS



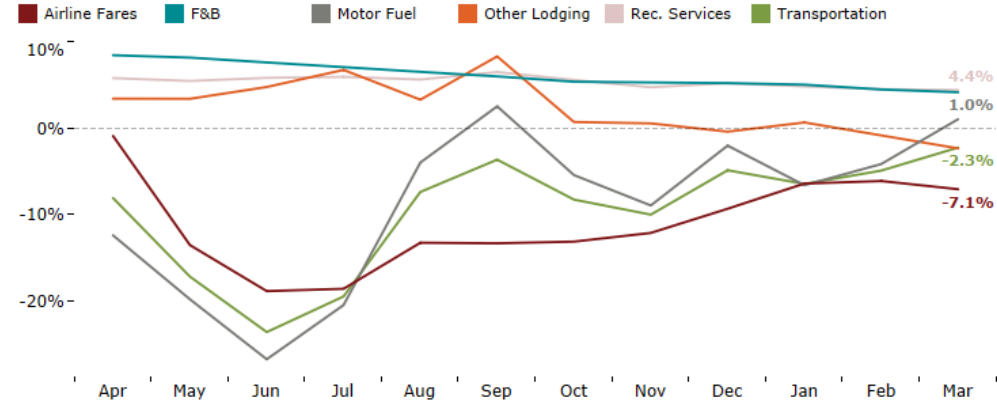




# US Travel Trends

## Travel Price Index

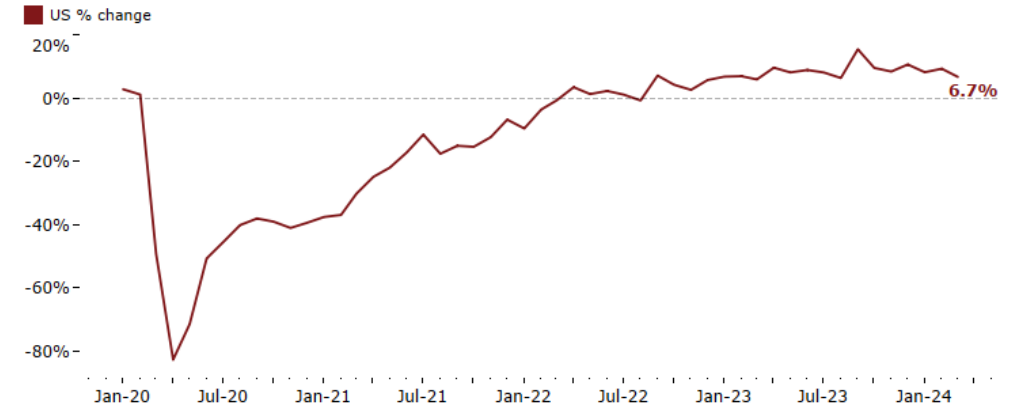
% Change Relative to Same Month in Previous Year | Last 12 Months



Source: U.S. Travel Association via U.S. Travel Recovery Tracker

## Travel Spending (% change vs 2019)

% Change vs. 2019 | U.S. total

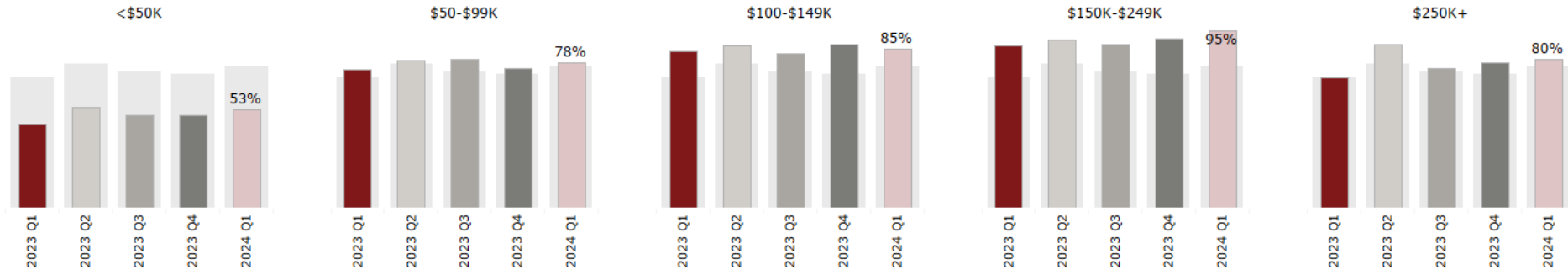


Source: Tourism Economics via U.S. Travel Recovery Tracker

## Planning Leisure Travel Within the Next 12 Months

% of American Consumers Planning Travel by Household Income (Calendar Year)

Legend: 2023 Q1, 2023 Q2, 2023 Q3, 2023 Q4, 2024 Q1



Note: Light gray bars represent the average for all survey respondents  
Source: MMGY Global's Portrait of American Travelers

Powered by SYMPHONY TOURISM ECONOMICS



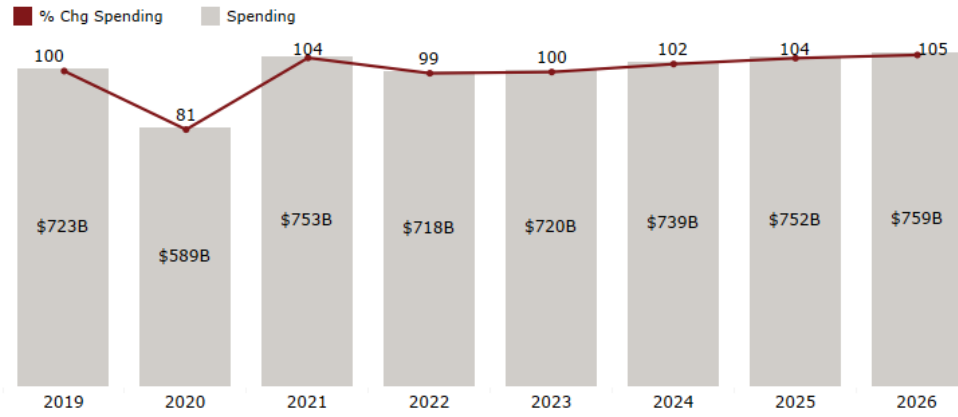


# Domestic Travel Forecast



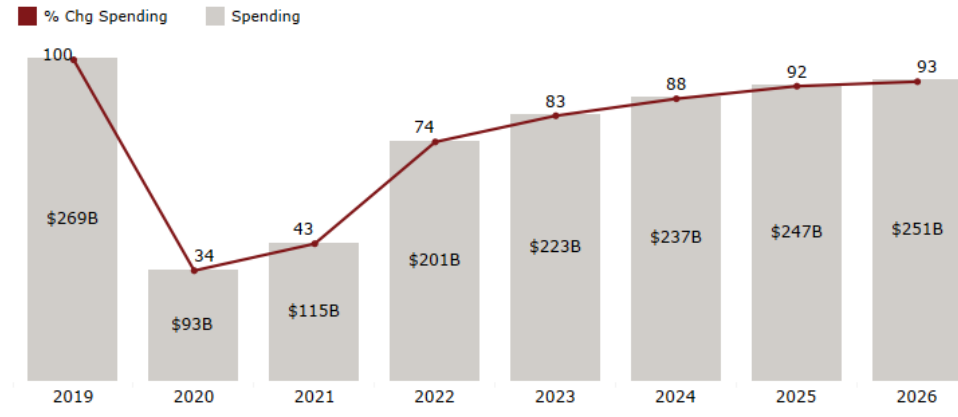
## Real Domestic Leisure Travel Spending

Forecasted recovery, relative to 2019 (index, 2019=100)



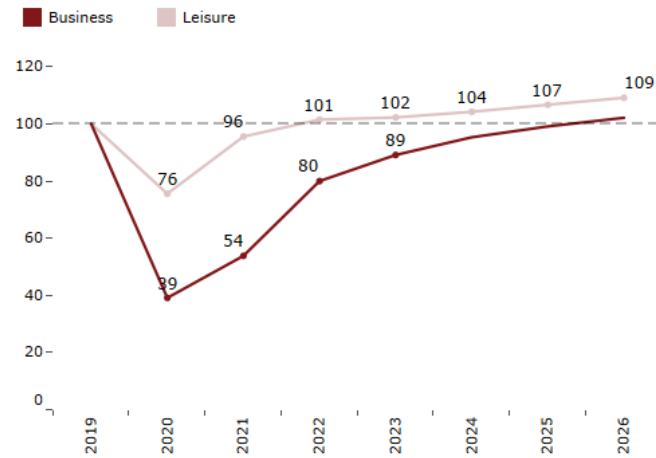
## Real Domestic Business Travel Spending

Forecasted recovery, relative to 2019 (index, 2019=100)



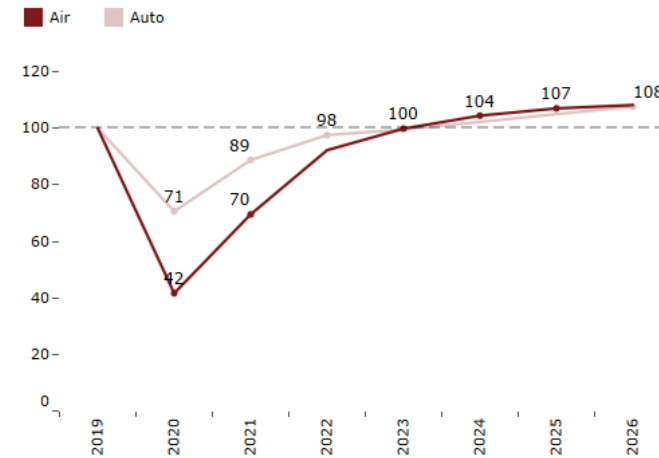
## Leisure vs. Business Travel Volume

Forecasted recovery, relative to 2019 (index, 2019=100)



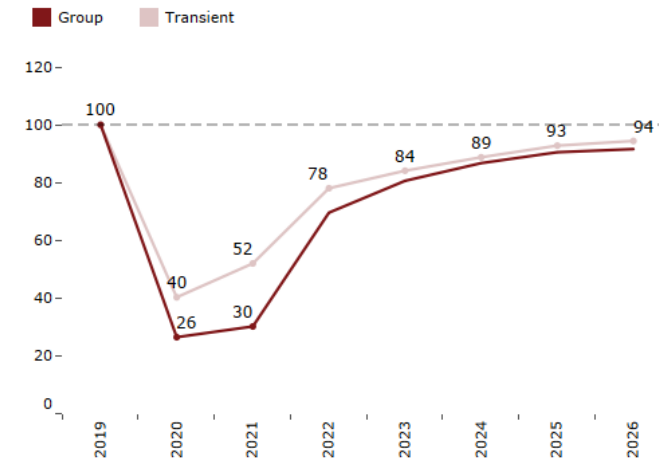
## Auto vs. Air Travel Volume

Forecasted recovery, relative to 2019 (index, 2019=100)



## Group vs. Transient Travel Spending

Forecasted recovery, relative to 2019 (index, 2019=100)



Forecast as of December 2023  
Source: Tourism Economics via U.S. Travel Recovery Tracker

Powered by **SYMPHONY** TOURISM ECONOMICS



# Hotel Performance by Period

Sedona+ (3/24/2024 - 4/6/2024)



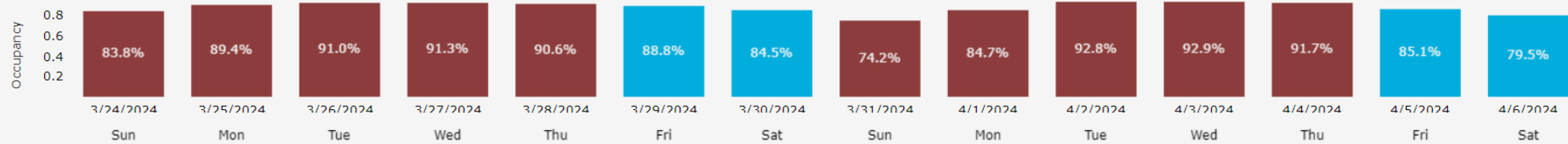
Location:  Segment:  Measure Selector:

Selected Period  
From:   
To:

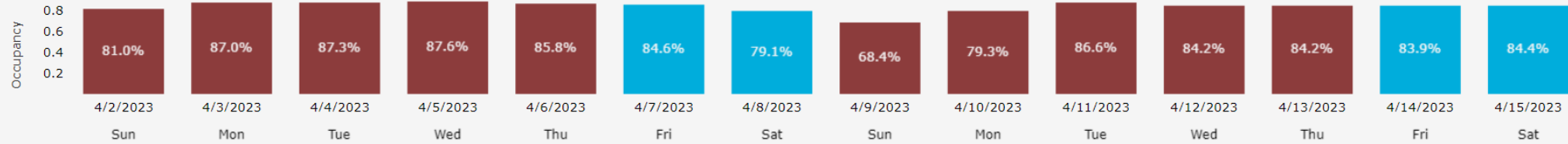
Comparison Period  
From:   
To:

■ Weekend ■ Weekday

Selected Period - 3/24/2024 - 4/6/2024



Comparison Period - 4/2/2023 - 4/15/2023



	Occupancy	ADR	RevPAR	Supply	Demand	Revenue
<b>Selected Period</b> <small>(3/24/2024 - 4/6/2024)</small>	<b>87.2%</b>	<b>\$454.30</b>	<b>\$396.00</b>	<b>30.3K</b>	<b>26.4K</b>	<b>\$12.0M</b>
<b>Comparison Period</b> <small>(4/2/2023 - 4/15/2023)</small>	<b>83.1%</b>	<b>\$455.08</b>	<b>\$378.13</b>	<b>30.3K</b>	<b>25.1K</b>	<b>\$11.4M</b>
<b>% Change</b> <small>(3/24/2024 - 4/6/2024) vs. (4/2/2023 - 4/15/2023)</small>	<b>↗ +4.9%</b>	<b>↘ -0.2%</b>	<b>↗ +4.7%</b>	<b>—</b>	<b>↗ +4.9%</b>	<b>↗ +4.7%</b>

Source: STR

Powered by **SYMPHONY** TOURISM ECONOMICS



# TOURISM PROGRAM

www.ScenicSedona.com

# Summer Stewardship Campaign

Embrace the Moment



**TOURISM PROGRAM**

[www.ScenicSedona.com](http://www.ScenicSedona.com)



# IN THE MOMENT

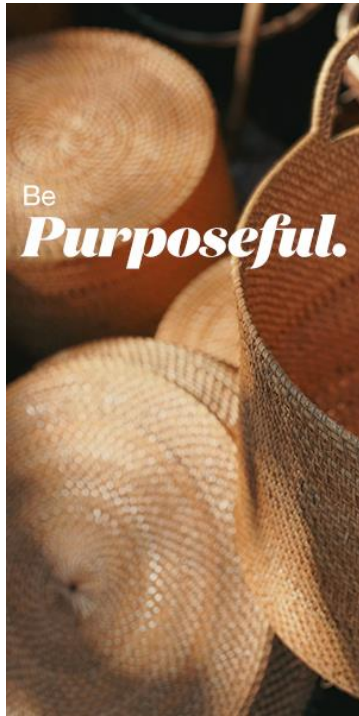
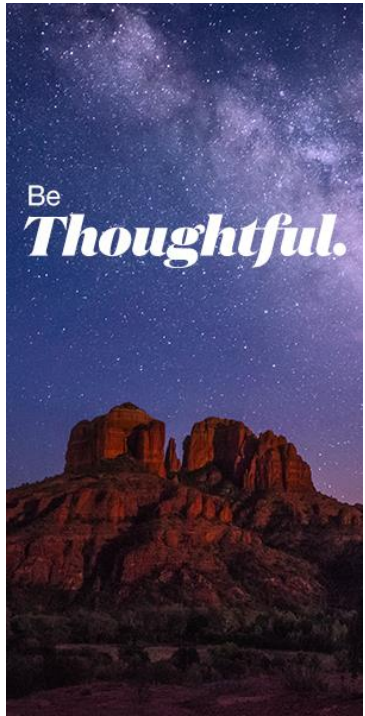
In a world where the focus often lies on capturing images for social media validation, the essence of living in the present moment is often overshadowed. This concept emphasizes the importance of the small things we can do that have big impact. This in turn can create a deeper respect for natural places and the local community while encouraging better habits.

This idea also lends itself to creating more educational videos where we can focus on some of the detailed ways that people can be responsible and effect change; for example, leave no trace, staying on marked trails, avoiding areas of overuse, being polite and courteous to others, etc.

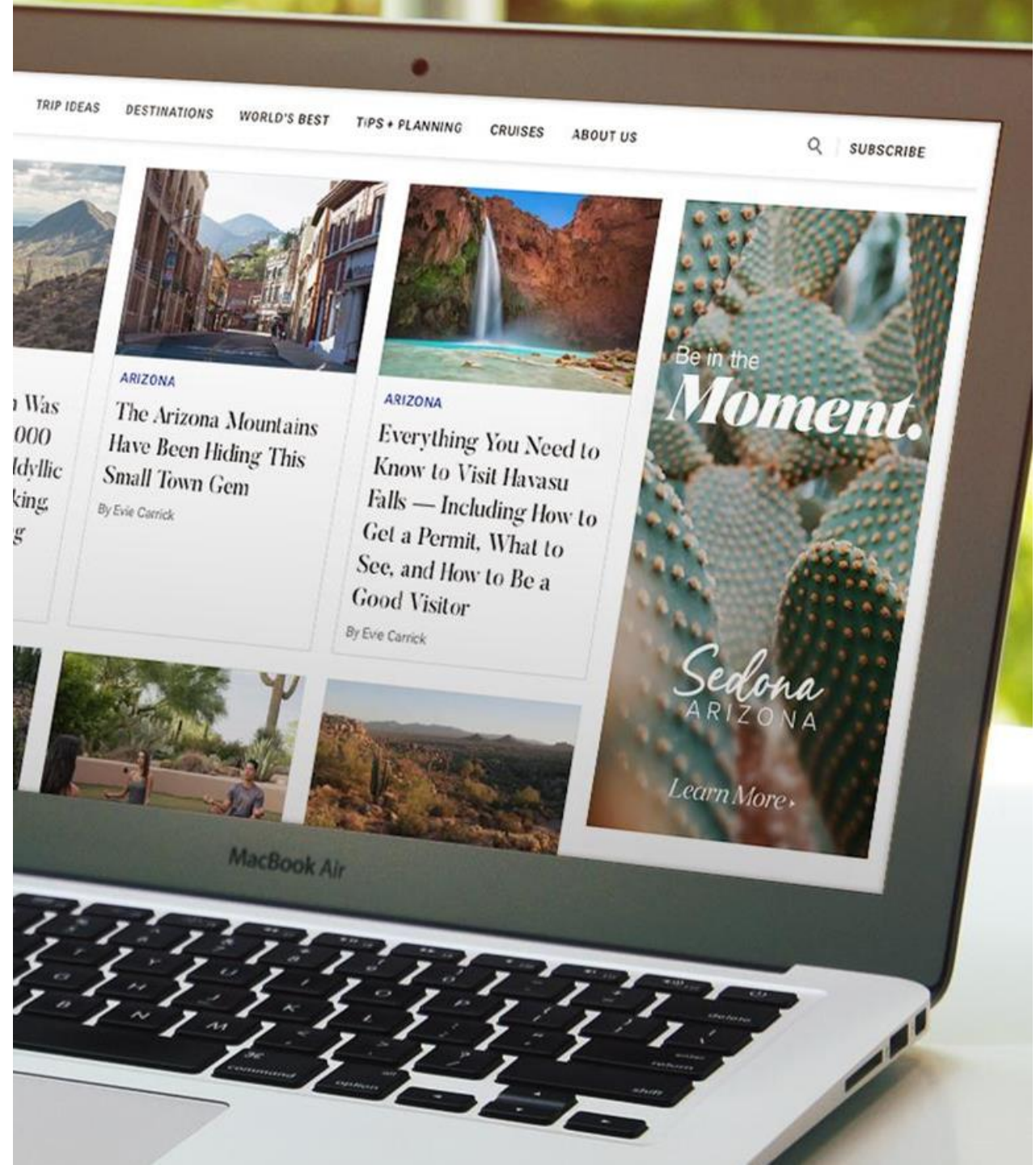




# DIGITAL ADS



3 frame Animated ad out-of-market

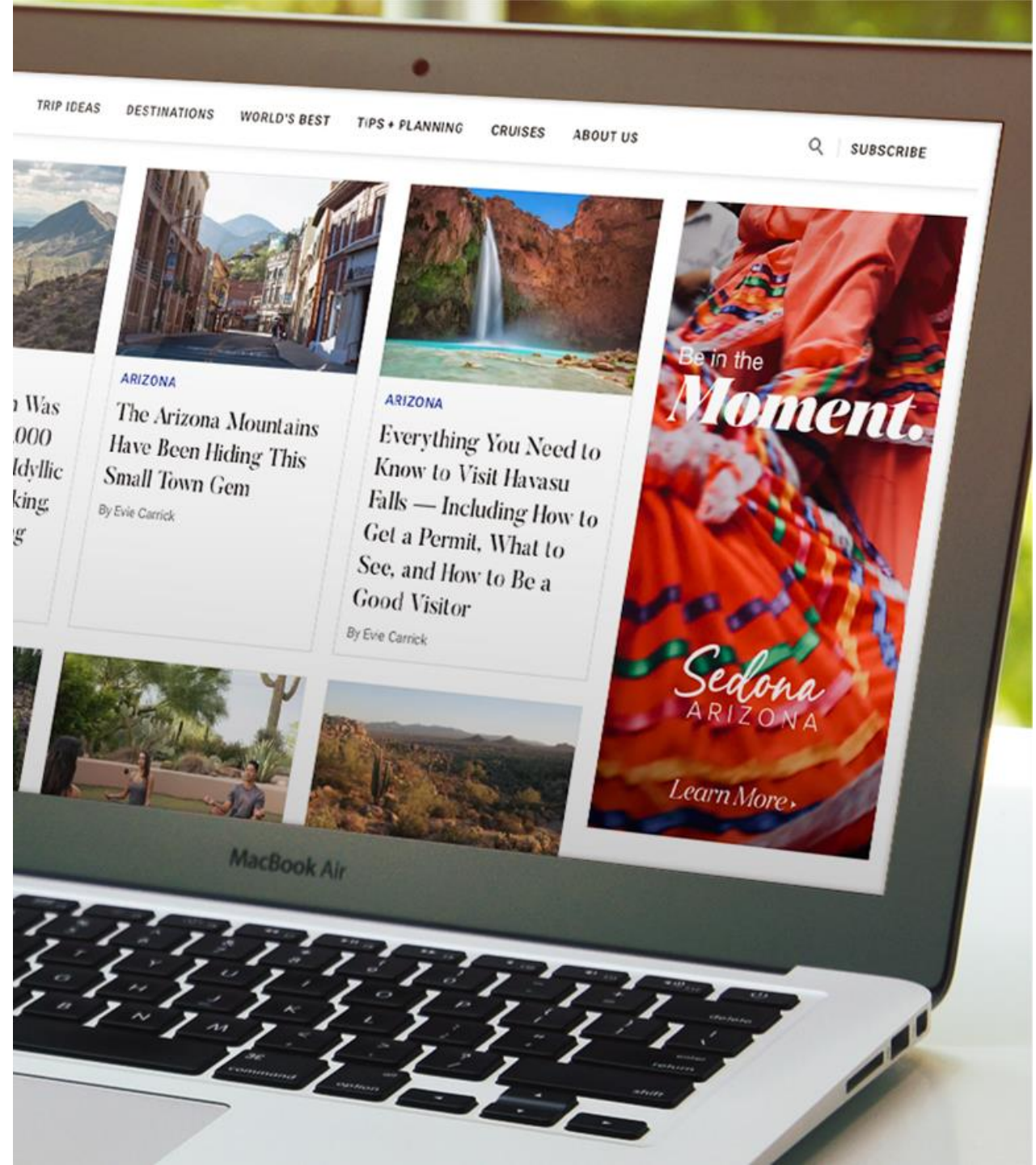




# DIGITAL ADS

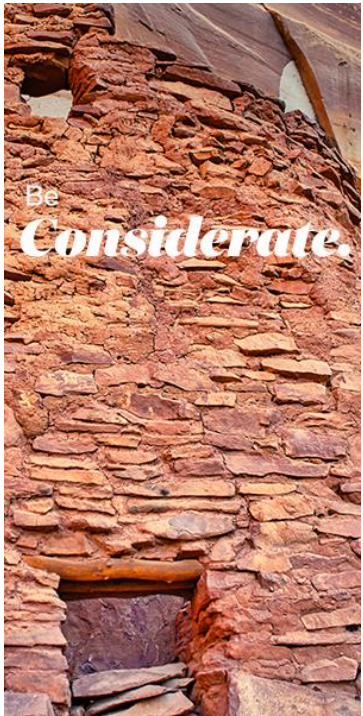


3 frame Animated ad out-of-market

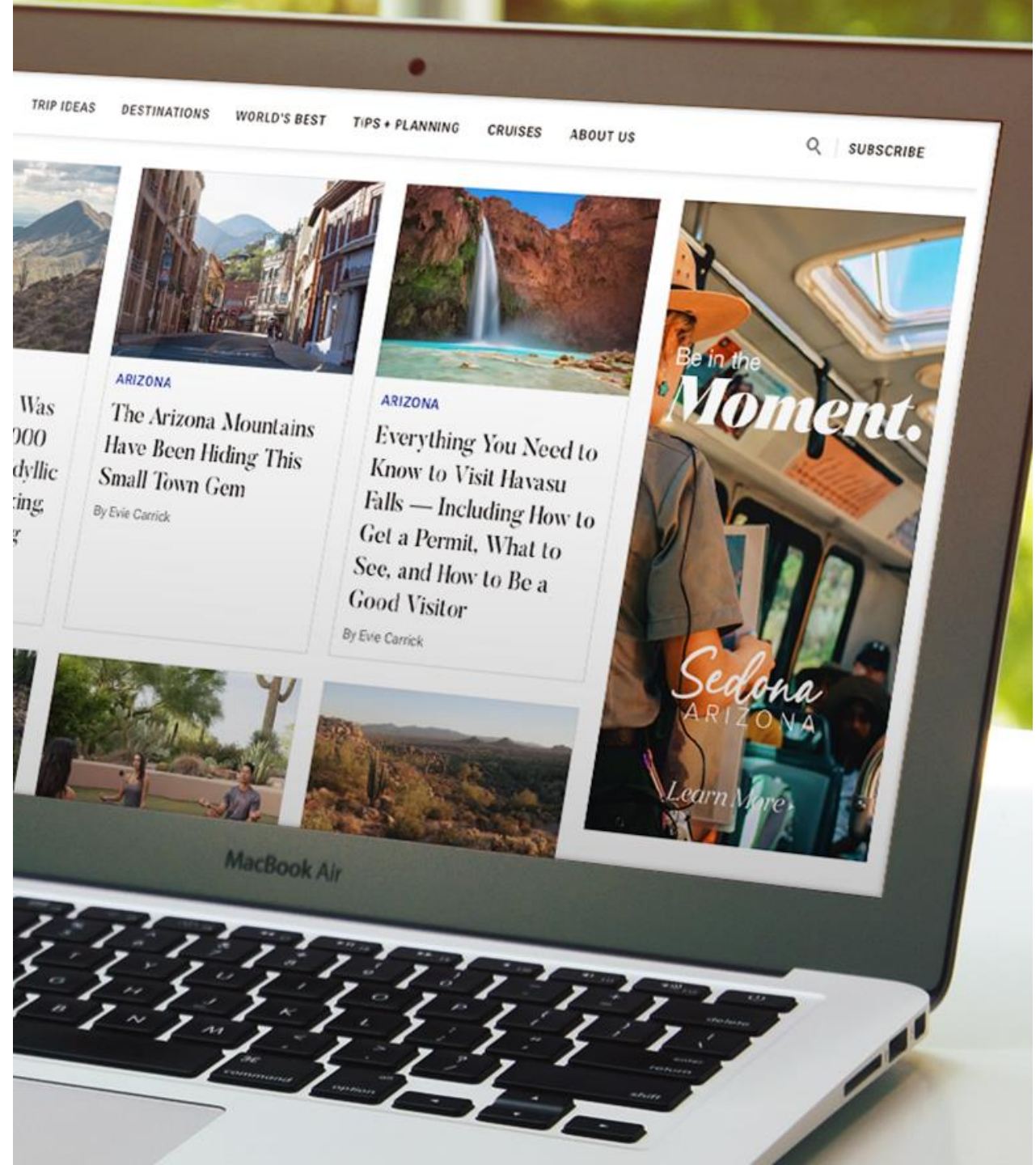




# DIGITAL ADS



3 frame Animated ad in-market





# PRINT ADS

## Body Copy

### It's in the details.

In Sedona there are plenty of big moments, but it's the small actions that count. Staying on trail, leaving no trace, and being respectful make all the difference. And, as stewards of this land, it's nice to slow down and appreciate the details.

Join us and embrace the moment.  
Learn more at [ScenicSedona.com](http://ScenicSedona.com)





# PRINT ADS

## Body Copy

### It's in the details.

Discover the connection that comes from engaging with the desert's beauty. Embrace each moment with mindfulness, where simple acts of care nurture a culture of respect and conservation for our natural wonders.

Join us and embrace the moment.  
Learn more at [ScenicSedona.com](http://ScenicSedona.com)





# Video – out-of-market stewardship



Fade in. Quiet and still except natural ambient sounds (crickets, frogs,, wind)

**VO: In Sedona there are plenty of big moments...**



Sweeping, slow panning shot of Sedona rock formations with hiker.



Striking shot of hikers appreciating/engaging with surroundings.

**VO: ...and being respectful make all the difference.**



Cut to another grand sweeping shot.



Close up detail of cacti, ambient natural sounds and movement.

**VO: And, as stewards of this land, it's nice to slow down and appreciate the details.**



Another wide shot, yet getting more intimate, Include hiker.

**VO: but it's the small actions that count.**



Stationary shot. Dynamic movement of fabric flowing and bodies in motion, across frame. Sounds of people, music, festival.

**VO: Join us and embrace the moment.**



# Video

– in-market education



Fade in. Quiet and still except natural ambient sounds.

**VO: In Sedona there are plenty of big moments...**



Sweeping, slow panning shot of stars and signage of Dark Sky designation.

**VO: ...and being aware, respectful, and considerate make all the difference.**



Cut to inspiring shot of Native dwelling or petroglyphs, that command reverence.

**VO: And, as stewards of this land, we're in this together. We need your help to preserve and protect what makes Sedona, Sedona.**



Stationary shot. Small movements from animal.

**VO: Yet, a place this grand requires small, thoughtful choices.**



Another ambient outdoor shot, closer up, intimate, showing trail signage.

**VO: Staying on trail, leaving no trace...**



Shot of Sedona Shuttle making a stop and letting out hikers.

**VO: ...and being aware, respectful, and considerate make all the difference.**



Close up of hiker appreciating surroundings.

**VO: And, as stewards of this land, we're in this together. We need your help to preserve and protect what makes Sedona, Sedona.**



Stationary shot from inside shuttle with interpretive speaker engaging with riders.

**VO: Join us and embrace the moment.**

# Photo / Video Shoot

April 8-10, 2024

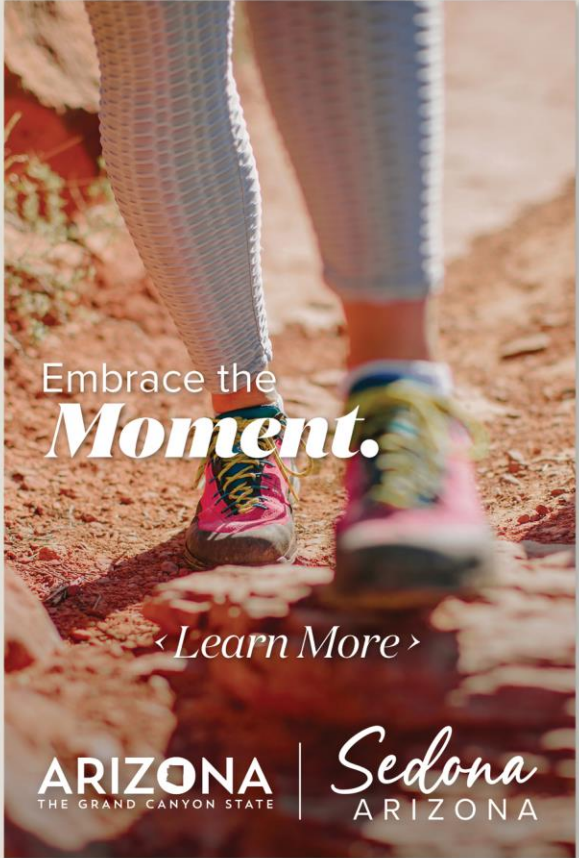
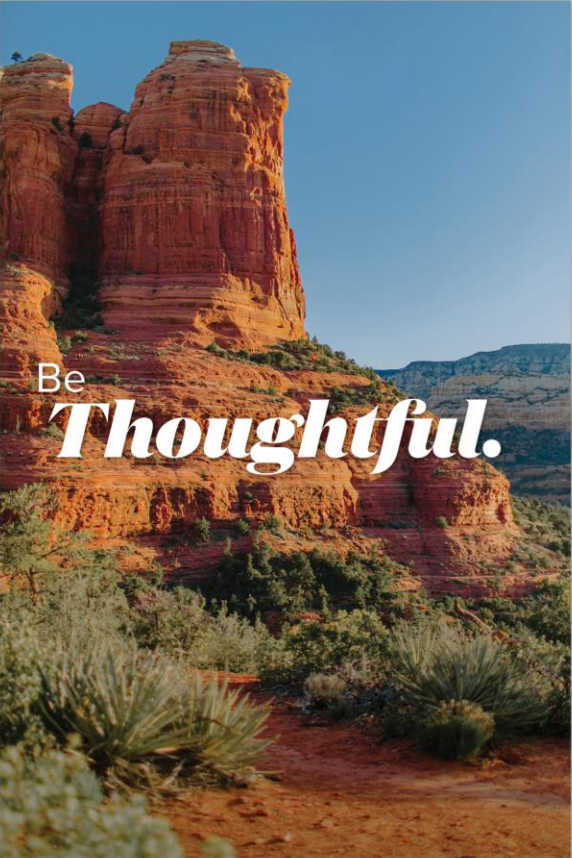


**TOURISM PROGRAM**

[www.ScenicSedona.com](http://www.ScenicSedona.com)



# San Diego Magazine / AOT Co-op

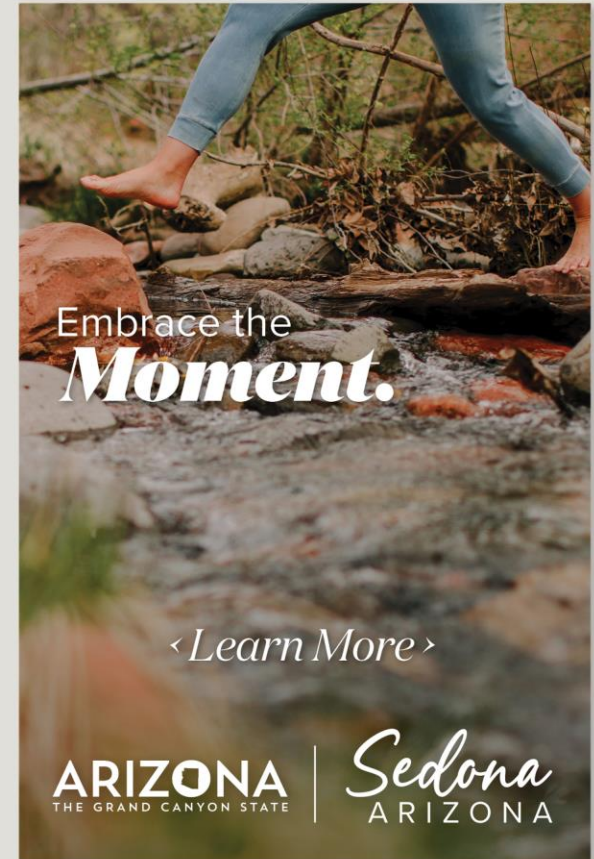


**TOURISM PROGRAM**

ScenicSedona.com

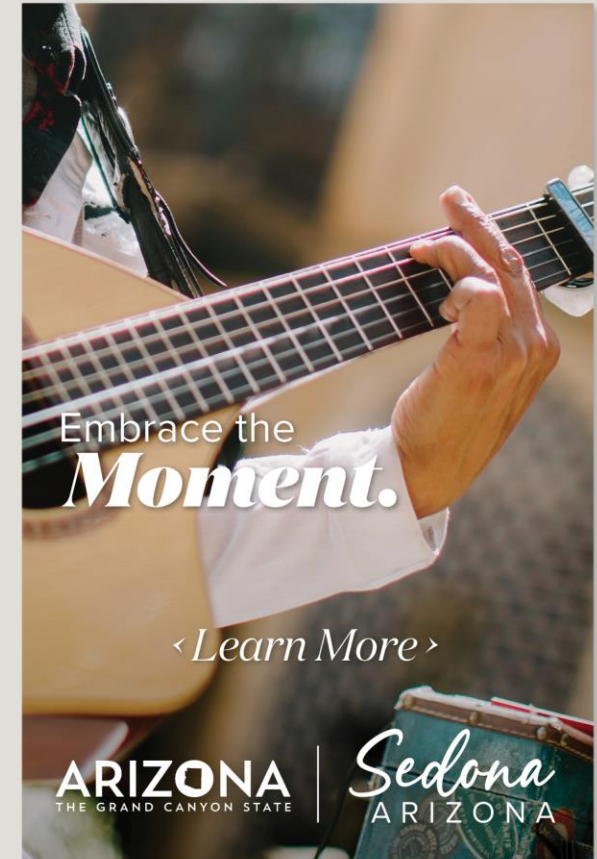


# San Diego Magazine / AOT Co-op





# San Diego Magazine / AOT Co-op



**TOURISM PROGRAM**

ScenicSedona.com



# San Diego Magazine / AOT Co-op



**TOURISM PROGRAM**

[www.ScenicSedona.com](http://www.ScenicSedona.com)

# San Diego Magazine / AOT Co-op



**TOURISM PROGRAM**

[www.ScenicSedona.com](http://www.ScenicSedona.com)



# Video Highlight Reel



**TOURISM PROGRAM**

[www.ScenicSedona.com](http://www.ScenicSedona.com)



**TOURISM PROGRAM**

[www.ScenicSedona.com](http://www.ScenicSedona.com)

# Ad placement

## Out-of-market (including LA & PHX)

- Programmatic via Datafy
- All “Be/Embrace” creative plus native
  - Upper funnel
    - 2 upper funnel in-banner video or run as pre-roll/in-stream
    - 2 native ads – utilizing website content and/or new landing page
    - 2 upper funnel GIF display – DVA to define executions and images
  - Retargeting
    - 2-3 retargeting GIF – DVA to define the executions and images





# Ad placement

## In-market + PHX

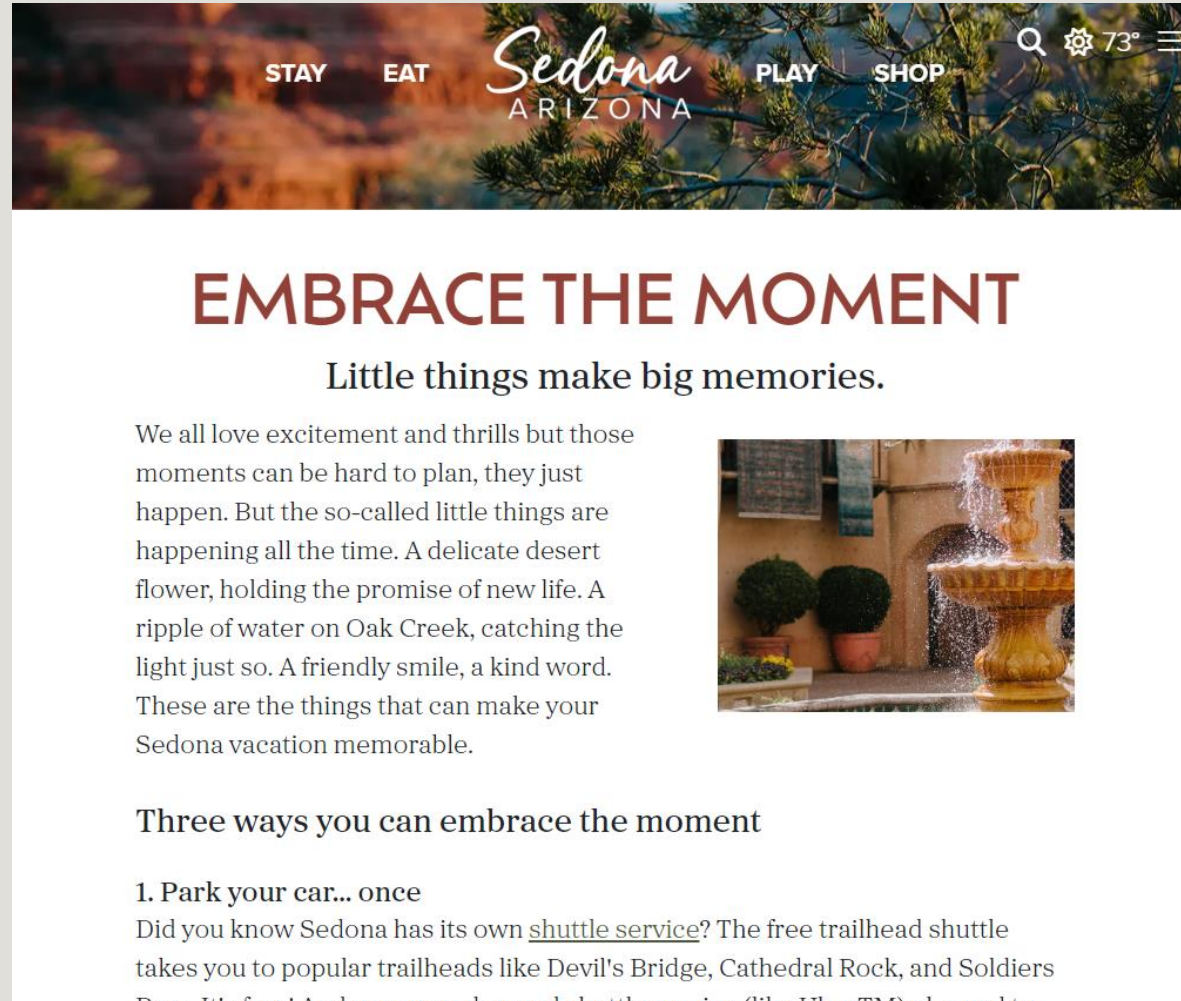
- Running via Meta
- Running in/on the shuttle buses
- Running the stewardship-only ads
  - 2-3 :10-:15 video optimized for views
  - 2-3 GIFs driving to sustainability landing page
  - :30 video for use on the shuttle bus
- Hotel stewardship toolkit

## Search AZ + CA

- Foundational “what to do, where to go, where to stay, in Arizona”, possibly with summer-specific terms



scenicqedona.com/embrace-the-moment




The screenshot shows the top navigation bar of the scenicqedona.com website. The header features a scenic background of Sedona, Arizona, with navigation links for STAY, EAT, Sedona ARIZONA (in a script font), PLAY, and SHOP. On the right side of the header, there are icons for search, settings, a temperature display of 73°, and a menu icon.

## EMBRACE THE MOMENT

Little things make big memories.

We all love excitement and thrills but those moments can be hard to plan, they just happen. But the so-called little things are happening all the time. A delicate desert flower, holding the promise of new life. A ripple of water on Oak Creek, catching the light just so. A friendly smile, a kind word. These are the things that can make your Sedona vacation memorable.



### Three ways you can embrace the moment

- 1. Park your car... once**

Did you know Sedona has its own shuttle service? The free trailhead shuttle takes you to popular trailheads like Devil's Bridge, Cathedral Rock, and Soldiers Pass. It's free! And a new on-demand shuttle service (like Uber™) planned to



**TOURISM PROGRAM**

www.ScenicSedona.com

# Stewardship Toolkit

- Images / videos
- Stewardship links
- Sample social posts
- Sample confirmation email
- Talking points for staff
- Hotel brochure



# TAB Roles

- Attend tourism-related meetings
- Champion the stewardship toolkit



# Front Burner Media News & Updates

(a.k.a. Around the World with Heather in 10 minutes or less)



**TOURISM PROGRAM**

[www.ScenicSedona.com](http://www.ScenicSedona.com)

## **AOT Roundtable attendance 4/3/24**

- AOT budget is currently with the legislature. Everything is subject to appropriations. Looking at a 2% budget reduction.
- AOT receives funding from Prop 302, and 202. In the future they are looking at formula funding. Working with Jim Rounds to set up a system for getting a bill to legislature, having someone adopt it, and take it forward, could take years. It'll require everyone around the state working together to see this happen. It could mean more funding for rural communities.
- Emerging markets- Japan (because this will be the next international destination with a direct flight from Phoenix), Korea, and India.
- Brand pillars coming from the AZ rebranding process: majestic beauty, welcoming warmth, abundant diversity, strong interconnection, trailblazing ingenuity, vibrant culture.



## Wall Street Journal

- David Weiss reached out to Heather on March 30 to discuss a piece he was working on with a tight deadline. He had one night confirmed at the Hilton and needed other places. The trick: he was traveling with his wife and dog, needed, to include high end travel, and Enchantment was a request. Arrangements were made for lodging at Enchantment, with dinner and spa, Sky Rock, tour and meeting with GM, pet psychic, visit to Bar Woo Woo, site tour of Ambiente with management team, lunch on site. Dinner at Elote, hiking suggestions, breakfast meetings, and too many phone calls and text messages to count. Results: 12,119,000 circulation, and \$302,975 AVE (advertising value equivalency).

## Apollo & Artemis (French online pub. with video)

- We hosted Paul Diey and Lucie Brudy on April 9. They stayed at Whispering Creek B&B, dined at Elote, and experienced a Red Rock Jeep Tour. Video and online piece will publish in June.





## Wall Street Journal

- IPW (International Pow Wow) preparation. May 4-8 in L.A. As the leading inbound travel trade show, past IPWs have generated more than \$5.5 billion in future travel by connecting U.S. travel exhibitors with travel buyers and media to promote their product and negotiate future business, securing America's position as a foremost global travel destination and showcasing the best of what the U.S. has to offer.

## News & Industry Updates

- GCOT: Arizona Governor's Conference on Tourism is August 21-23 at JW Marriott Scottsdale. Early bird registration until May 16.



# Tourism Advisory Board

Thank you



**TOURISM PROGRAM**

[www.ScenicSedona.com](http://www.ScenicSedona.com)