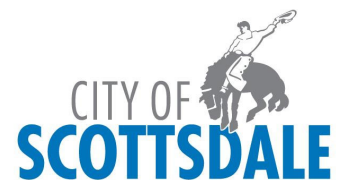


Scottsdale

Tourism Study - Lodging Statistics



October 2023
Tourism and Events



Scottsdale Lodging Statistics

September 2023

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The City of Scottsdale
Tourism and Events Department

Phone: (480) 312-4013

www.scottsdaleaz.gov/tourism

sgeiogamah@scottsdaleaz.gov

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Introduction

The primary purpose of *The Scottsdale Tourism Study Lodging Report* is to provide market information for the tourism, retail, and hospitality operations within the study area. The study looks specifically at trends in local transient occupancy tax (bed tax) collection, room inventory, average room rates, occupancy rates and other factors relating to lodging trends. The report provides information to elected officials, city management, the general public, and private-sector entities regarding the tourism and hospitality markets.

Much of the information contained in the Lodging Statistics study is based on tax collection figures. Bed tax collection figures are used because they are important and consistently tracked and readily available but it is important to remember these three points:

- ◇ The tax receipt figures shown for each month reflect actual sales tax and bed tax collections during the previous month. There is a lag of one month between sales activity and receipts.
- ◇ The data in this report (unless otherwise noted) is based primarily on properties located within the City of Scottsdale.
- ◇ With the exception of room stock data, no information is available for properties that lie just outside the corporate limits of the City of Scottsdale and the Town of Paradise Valley. It may be reasonable to assume the data for these properties would be very similar to similar properties in the market area, but no projections are made as part of this report.

EXECUTIVE SUMMARY

- ◇ Scottsdale's bed tax revenues totaled \$32,641,166 in 2022, up 39 percent from 2021.
- ◇ The Scottsdale market area has increased by 1,391 rooms since 2013. The number of rooms within the City of Scottsdale increased by 237 rooms in 2022, compared to 2021.
- ◇ In the past 10 years, bed tax revenues has generated over \$199 million for the City of Scottsdale.
- ◇ Hotel/motel sales tax revenues for the City of Scottsdale in 2022 increased 51 percent from 2021 with \$18,875,743 in collections.
- ◇ Annual occupancy for the Scottsdale market area in 2022 was 65 percent, up from 57.6 percent in 2021.
- ◇ The average room rate for Scottsdale market area hotels in 2022 was \$273.91, an increase from the 2021 average of \$228.49, per room.
- ◇ The percentage of room revenue to total hotel revenues for the City of Scottsdale in 2022 was 60.4 percent.



THE SCOTTSDALE MARKET AREA

Map 1 (p. 6) Google interactive map accessed by scanning the below QR code with mobile phone camera. Shows the boundaries of the Scottsdale market area, and the locations of market area hotels. The market area contains all of the City of Scottsdale and the Town of Paradise Valley; portions of the cities of Phoenix and Tempe; and parts of the towns of Carefree, Cave Creek, Fountain Hills, and the Salt River Pima Maricopa Indian Community (SRPMIC).

Table 1 (p. 7) lists the hotels in the Scottsdale market area.

Map 1



Table 1

Existing Scottsdale/Paradise Valley Market Area Properties
(Transient Use Properties with more than 25 rooms)

Scottsdale Properties

	<u>Property Name</u>	<u>Address</u>	<u>Rooms</u>
1	3 Palms Hotel	7707 E. McDowell Rd.	130
2	Aiden By Best Western @ Scottsdale North	10801 N. 89th Pl.	164
3	aloft Scottsdale	4415 N. Civic Center Plaza	126
4	Best Western Plus Scottsdale Thunderbird Suites	7515 E. Butherus Dr.	120
5	Best Western Plus Sundial	7320 E. Camelback Rd.	54
6	Boulders Resort & Spa, Curio Collection by Hilton	34631 N. Tom Darlington	160
7	Canopy by Hilton Scottsdale Old Town	7142 E 1st Street	178
8	Comfort Suites Old Town Scottsdale	3275 N. Drinkwater Blvd.	60
9	Courtyard Scottsdale Old Town	3311 N. Scottsdale Rd.	180
10	Element Scottsdale at SkySong	1345 N. Scottsdale Rd	157
11	Embassy Suites by Hilton Scottsdale Resort	5001 N. Scottsdale Rd.	312
12	Extended Stay America - Phoenix - Scottsdale	10660 N. 69th St.	106
13	Extended Stay America - Phoenix - Scottsdale - North	15501 N. Scottsdale Rd.	120
14	Extended Stay America - Phoenix - Scottsdale - Old Town	3560 N. Marshall Way	121
15	Fairmont Scottsdale Princess	7575 E. Princess Dr.	750
16	Four Seasons Resort Scottsdale at Troon North	10600 E. Crescent Moon Dr	210
17	Hampton by Hilton Inn & Suites Phoenix/Scottsdale on Shea	10101 N. Scottsdale Rd.	150
18	Hilton Garden Inn Scottsdale North/Perimeter Center	8550 E. Princess Dr	122
19	Hilton Garden Inn Scottsdale Old Town	7324 E. Indian School Rd.	199
20	Hilton North Scottsdale at Cavasson	18700 N Hayden Rd.	237
21	Hilton Scottsdale Resort & Villas	6333 N. Scottsdale Rd.	235
22	Holiday Inn & Suites Scottsdale North - Airpark	14255 N. 87th St	117
23	Holiday Inn Express & Suites Scottsdale - Old Town	3131 N. Scottsdale Rd.	169
24	Holiday Inn Express Scottsdale North	7350 E. Gold Dust Ave.	122
25	Hotel Adeline, Scottsdale, A Tribute Portfolio Hotel	5101 N. Scottsdale Rd.	213
26	Hotel Valley Ho	6850 E Main St	241
27	Hyatt House Scottsdale/Old Town	4245 N. Drinkwater Dr.	164
28	Hyatt Place / Hyatt House North Scottsdale	18513 N Scottsdale Rd	229
29	Hyatt Place Scottsdale/Old Town	7300 E. 3rd Ave.	126
30	Hyatt Regency Scottsdale Resort & Spa at Gainey Ranch	7500 E. Doubletree Ranch	493
31	Independence 47 Hotel	7330 N. Pima Rd.	47
32	La Quinta Inns & Suites by Wyndham Phoenix Scottsdale	8888 E. Shea Blvd.	140
33	Metro Scottsdale	9880 N. Scottsdale Rd.	114
34	Motel 6 Old Town Scottsdale	6848 E. Camelback Rd.	122
35	Residence Inn by Marriott Scottsdale North	17011 N. Scottsdale Rd.	120
36	Scottsdale Links Resort	16858 N. Perimeter Dr.	218
37	Scottsdale Marriott at McDowell Mountains	16770 N. Perimeter Dr.	266
38	Scottsdale Marriott Old Town	7325 E. 3rd Ave.	243
39	Scottsdale Park Suites	1251 N. Miller Rd.	95
40	Scottsdale Villa Mirage	7887 E. Princess Blvd.	224

Table 1 (Continued)**Scottsdale Properties (Continued)**

	Property Name	Address	Rooms
41	Senna House Scottsdale, Curio Collection by Hilton	7501 E Camelback Rd	169
42	Sheraton's Desert Oasis	17700 N. Hayden Rd.	300
43	Sonder the Mariposa	7017 E. McDowell Rd.	60
44	Sonder the Monarch	4000 N Drinkwater Blvd	194
45	Sonesta ES Suites Scottsdale - Paradise Valley	6040 N. Scottsdale Rd.	122
46	Sonesta Select Scottsdale at Mayo Clinic	13444 E. Shea Blvd.	124
47	Sonesta Simply Suites Scottsdale North	10740 N. 90th St.	130
48	Sonesta Suites Scottsdale Gainey Ranch	7300 E. Gainey Suites Dr.	162
49	The McCormick Scottsdale	7421 N. Scottsdale Rd.	125
50	The Scott Resort & Spa	4925 N. Scottsdale Rd.	204
51	The Scottsdale Resort at McCormick Ranch	7700 E. McCormick Pkwy.	326
52	W Hotel Scottsdale	7277 E. Camelback Rd.	236
53	Worldmark Scottsdale	8235 E. Indian Bend Rd.	85
	Total Scottsdale Properties		9,591

Paradise Valley Properties*

	Property Name	Address	Rooms
1	Andaz Scottsdale Resort & Bungalows	6114 N Scottsdale Rd.	185
2	Doubletree Resort by Hilton Hotel Paradise Valley Scottsdale	5401 N. Scottsdale Rd.	378
3	JW Marriott Camelback Inn Scottsdale Resort & Spa	5402 E. Lincoln Dr.	453
4	Mountain Shadows Resort	5445 E. Lincoln Drive	217
5	Omni Scottsdale Resort & Spa at Montelucia	4949 E. Lincoln Dr.	293
6	Sanctuary Resort on Camelback	5700 E. McDonald Dr.	109
7	Scottsdale Plaza Resort	7200 N. Scottsdale Rd.	404
8	Smoke Tree Resort	7101 E. Lincoln Dr.	26
9	The Hermosa Inn, a boutique hideaway	5532 N. Palo Cristi Dr.	43
10	The Ritz-Carlton Paradise Valley, The Palmeraie	7000 E Lincoln Drive	215
	Total Paradise Valley Properties		2,323

Table 1 (Continued)**Other Market Properties**

(Carefree, Fountain Hills, Phoenix, Tempe, SRPMIC)*

	Property Name	Address	Rooms
1	AC Hotel by Marriott Scottsdale North	15200 N Kierland Blvd	165
2	Adero Scottsdale, Autograph Collections	13225 Eagle Ridge Dr.	177
3	aloft Tempe	951 E. Playa del Norte Dr.	136
4	Canyon Suites at the Phoenician	6000 E. Camelback Rd.	60
5	CIVANA Wellness Resort and Spa	37220 N. Mule Train Rd.	176
6	Comfort Inn - Fountain Hills	17105 E. Shea Blvd.	48
7	Comfort Inn & Suites Tempe	808 N. Scottsdale Rd.	82
8	Courtyard by Marriott Scottsdale North	17010 N. Scottsdale Rd.	153
9	Courtyard by Marriott Scottsdale Salt River	5201 N. Pima Rd.	158
10	Fountain Park Hotel, BW Signature Collection	12800 N. Saguaro Blvd.	60
11	Great Wolf Lodge Scottsdale	7333 N Pima Rd	350
12	Hampton Inn & Suites (Tempe)	1415 N. Scottsdale Rd.	117
13	Hampton Inn/Suites (North)	16620 N. Scottsdale Rd.	123
14	Hampton Inn/Suites Scottsdale Riverwalk	9550 E. Indian Bend	101
15	Holiday Inn Express & Suites Phoenix Tempe	670 N. Scottsdale Rd.	103
16	Inn at Eagle Mountain	9800 Summer Hill Blvd.	37
17	JW Marriott Phoenix Desert Ridge Resort & Spa	5350 E. Marriott Dr.	950
18	Motel 6 (Tempe)	1612 N. Scottsdale Rd.	106
19	Orange Tree Golf Resort (Phoenix)	10601 N. 56th St.	160
20	Post 1429	1429 N. Scottsdale Rd.	118
21	Scottsdale Camelback Resort (Phx)	6302 E. Camelback Rd.	111
22	Sleep Inn At North Scottsdale Road	16630 N. Scottsdale Rd.	107
23	SpringHill Suites Scottsdale North	17020 N. Scottsdale Rd.	121
24	Staybridge Suites Scottsdale - Talking Stick	9141 East Hummingbird Lane	131
25	SureStay Plus Hotel by Best Western North Scottsdale	13440 N. Scottsdale Rd.	131
26	Talking Stick Resort (SRPMIC)	9800 E. Indian Bend Rd.	496
27	The Phoenician, A Luxury Collection Resort	6000 E. Camelback Rd.	645
28	The Unbound Collection Royal Palms Resort & Spa (Phoenix)	5200 E. Camelback Rd.	119
29	Wekopa Casino Resort	10438 N. Ft. McDowell Rd.	246
30	Westin Kierland Resort & Spa (Phoenix)	6902 E. Greenway Pkwy.	735
	Total Other Market Properties		6,222

Source: City of Scottsdale, Tourism & Events Department

*These properties do not pay bed taxes or hotel sales taxes to the City of Scottsdale, & not all are included in the Scottsdale market data.

*Properties in [BLUE](#) indicate new properties as of 2022.

TRENDS IN TAX COLLECTION

Transient Occupancy Tax

The City of Scottsdale has a five percent transient occupancy tax (bed tax). In the past ten years, the bed tax has generated over \$199 million in revenue for the City. The City of Scottsdale has a voter approved allocation of bed tax funds toward the City's destination marketing, tourism related capital projects, general fund, tourism events, and research.

Table 2 (p. 11) presents monthly and yearly breakdowns of the bed tax receipts for Scottsdale from calendar year 2013 through 2022. During 2022, the city collected \$32,641,166 in bed taxes, a 39 percent increase from 2021 collections.

Sales Tax

In addition to bed tax, the City of Scottsdale tracks collection of the transaction privilege (sales) and use tax (1.75 percent) on all sales transactions in hotels. Maintaining a separate listing of all sales taxes received from hotels and motels provides a mechanism to track visitor purchasing trends.

Sales tax revenues generated by hotel/motel properties in 2022 totaled \$18,875,743 toward the general fund, a 51 percent increase from 2021. Around 37 percent of the revenues in this category were generated during the peak season (mid-January through April). Since 2013, the hotel/motel sales tax has generated over \$109 million in revenues for the City of Scottsdale.

Table 3 (p. 13) enumerates sales tax collected from Scottsdale hotels and motels since 2013.

Table 2

Monthly Bed Tax Receipts in Dollars
City of Scottsdale

(5% Tax Rate)

	Jan	Feb	Mar	Apr	May	June	July	Aug	Sept	Oct	Nov	Dec	Total
2013	\$891,379	\$1,695,722	\$1,602,606	\$2,408,496	\$1,595,317	\$117,220	\$702,513	\$592,219	\$549,687	\$869,451	\$1,272,297	\$1,173,582	\$13,470,489
2014	\$991,024	\$1,461,090	\$2,013,208	\$2,566,323	\$1,764,997	\$1,278,785	\$770,464	\$606,581	\$633,261	\$939,775	\$1,278,397	\$1,443,948	\$15,747,851
2015	\$1,031,086	\$2,271,788	\$2,158,027	\$2,869,673	\$1,806,673	\$1,256,091	\$751,742	\$686,517	\$621,760	\$889,778	\$1,381,703	\$1,439,295	\$17,164,132
2016	\$1,135,306	\$1,813,107	\$2,320,417	\$2,892,090	\$1,977,341	\$1,345,248	\$860,598	\$739,002	\$719,101	\$1,196,588	\$1,557,281	\$1,572,604	\$18,128,683
2017	\$1,173,835	\$1,115,043	\$2,417,432	\$2,458,315	\$3,054,168	\$1,761,758	\$1,176,941	\$902,085	\$929,939	\$999,185	\$1,436,557	\$1,530,091	\$18,955,348
2018	\$850,806	\$2,098,049	\$2,310,012	\$3,558,035	\$2,475,752	\$1,557,545	\$1,186,264	\$856,484	\$810,621	\$1,486,663	\$1,737,825	\$1,439,130	\$20,367,185
2019	\$2,050,720	\$2,328,754	\$2,504,161	\$4,014,668	\$2,312,147	\$1,532,549	\$1,335,801	\$1,010,798	\$1,123,499	\$1,464,346	\$1,773,886	\$2,400,840	\$23,852,170
2020	\$1,859,146	\$2,390,331	\$3,533,463	\$1,320,774	\$801,522	\$448,378	\$714,258	\$670,398	\$608,356	\$878,154	\$1,157,606	\$1,484,424	\$15,866,811
2021	\$875,652	\$935,898	\$2,631,085	\$2,537,046	\$2,340,277	\$2,412,324	\$1,433,064	\$1,916,089	\$1,226,616	\$1,754,159	\$2,864,104	\$2,565,291	\$23,491,604
2022	\$2,770,469	\$2,636,620	\$3,456,778	\$4,191,071	\$4,770,332	\$2,585,929	\$1,125,261	\$2,132,077	\$1,457,269	\$2,228,925	\$2,359,205	\$2,927,230	\$32,641,166
% of 2022 Total	8.5%	8.1%	10.6%	12.8%	14.6%	7.9%	3.4%	6.5%	4.5%	6.8%	7.2%	9.0%	100.0%
Avg % of 10 yr Total	6.8%	9.4%	12.5%	14.4%	11.5%	7.2%	5.0%	5.1%	4.3%	6.4%	8.4%	9.0%	100.0%

Source: City of Scottsdale, Tax Audit Department

BED TAX RECEIPTS

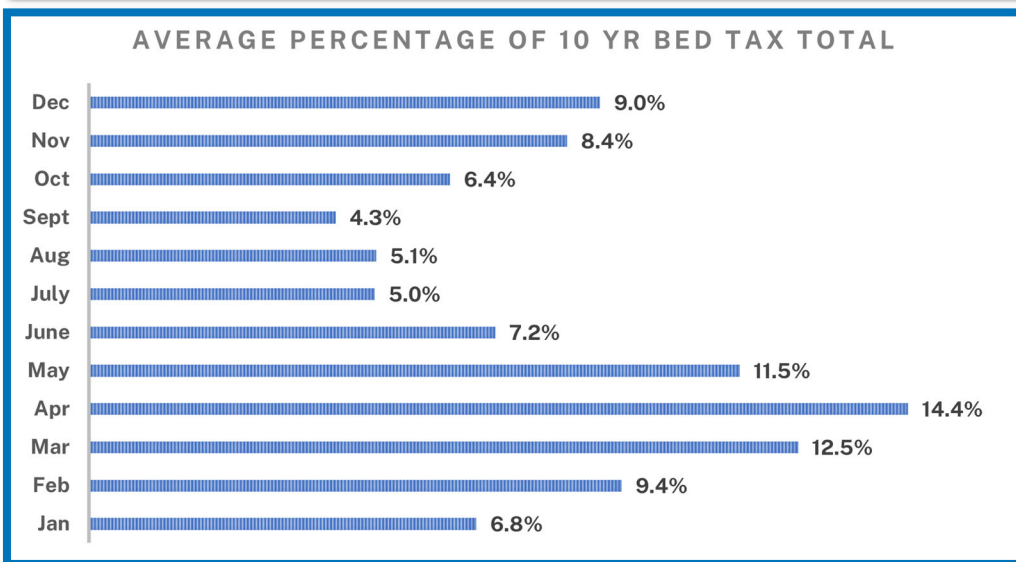
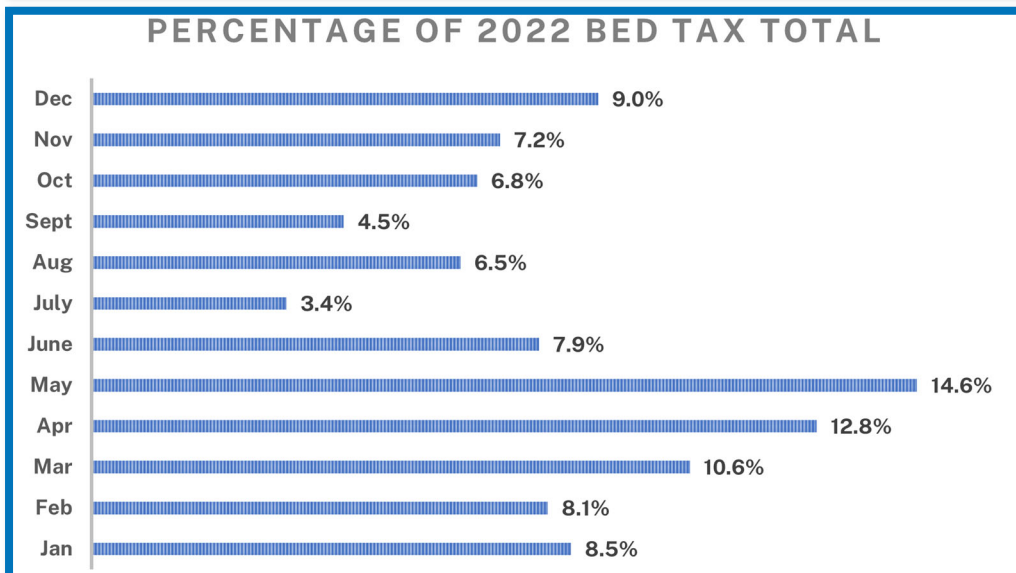
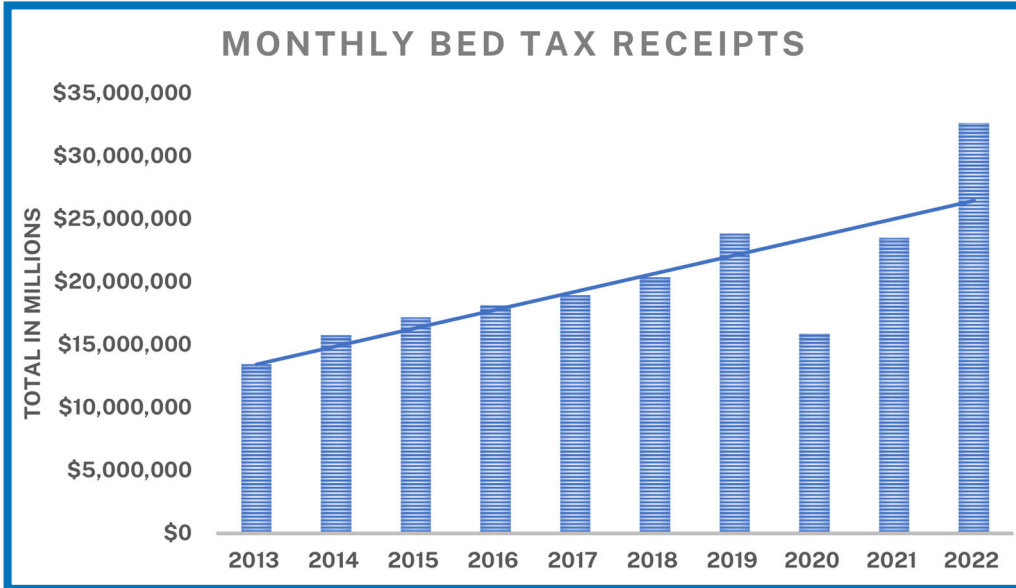


Table 3

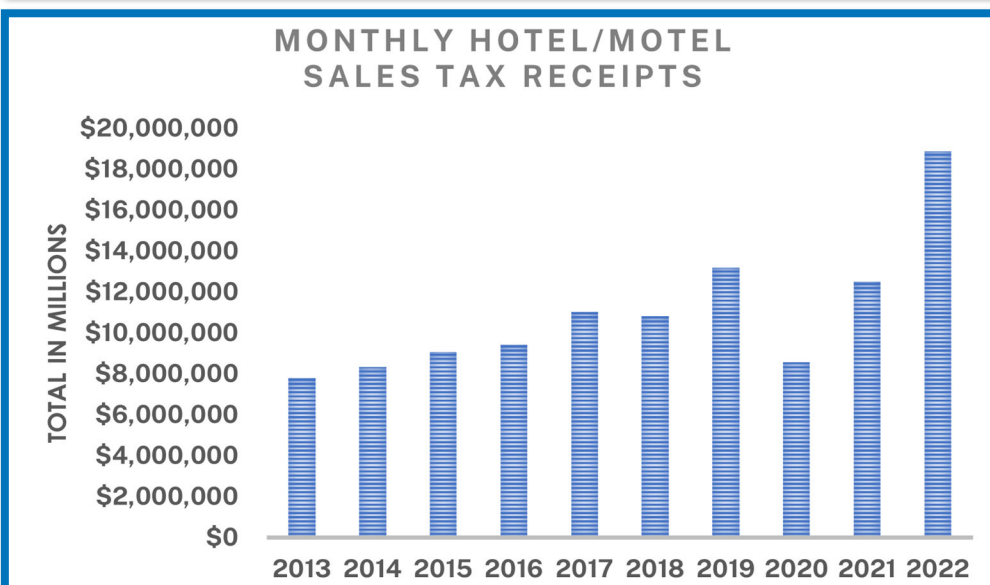
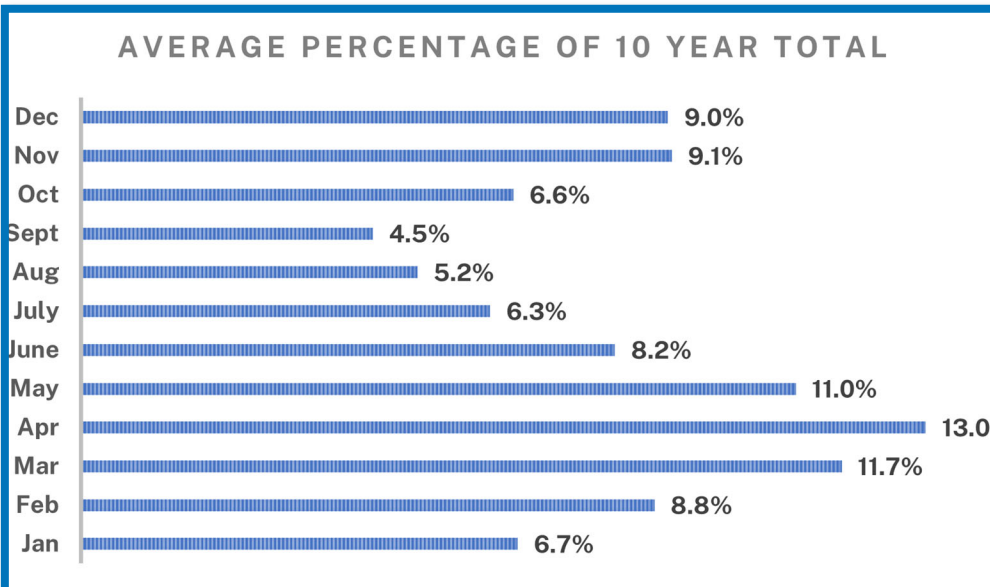
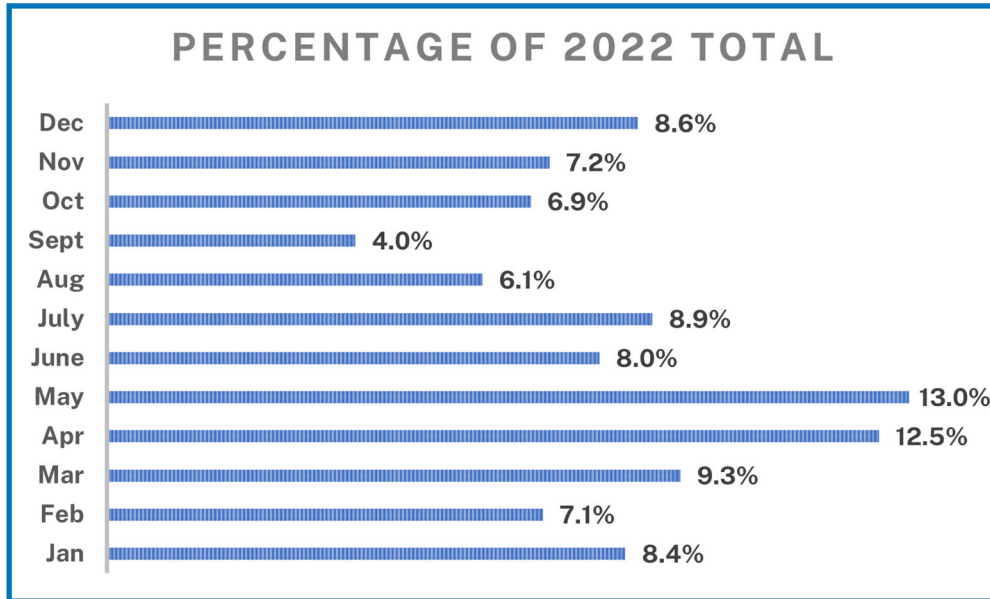
**Monthly Hotel/Motel Sales Tax Receipts
City of Scottsdale**

	Jan	Feb	Mar	Apr	May	June	July	Aug	Sept	Oct	Nov	Dec	Total
2013	\$495,223	\$866,856	\$821,619	\$1,148,266	\$891,479	\$633,745	\$404,986	\$357,062	\$311,769	\$514,438	\$719,488	\$647,647	\$7,812,579
2014	\$561,978	\$757,230	\$1,049,214	\$1,204,999	\$908,191	\$762,265	\$453,178	\$315,040	\$349,931	\$521,901	\$700,189	\$767,137	\$8,351,254
2015	\$565,077	\$1,144,515	\$1,027,004	\$1,324,397	\$920,654	\$710,159	\$431,460	\$425,928	\$378,695	\$564,049	\$789,305	\$796,080	\$9,077,324
2016	\$614,097	\$882,002	\$1,168,695	\$1,276,613	\$1,011,411	\$763,035	\$501,701	\$436,264	\$406,242	\$662,319	\$876,506	\$827,046	\$9,425,931
2017	\$687,430	\$661,680	\$1,189,894	\$1,215,515	\$1,563,477	\$1,202,885	\$867,519	\$631,302	\$636,246	\$586,277	\$882,369	\$908,322	\$11,032,916
2018	\$139,701	\$1,080,220	\$1,245,076	\$1,760,062	\$1,425,266	\$930,636	\$692,150	\$467,629	\$440,245	\$818,648	\$1,026,087	\$808,788	\$10,834,505
2019	\$1,134,389	\$1,221,358	\$1,371,216	\$2,071,043	\$1,261,080	\$886,799	\$808,854	\$471,137	\$646,096	\$892,265	\$1,069,506	\$1,357,355	\$13,191,098
2020	\$1,038,882	\$1,228,097	\$1,989,324	\$617,933	\$467,418	\$252,530	\$342,258	\$334,694	\$347,291	\$462,883	\$742,114	\$744,279	\$8,567,704
2021	\$527,357	\$485,902	\$1,199,473	\$1,240,370	\$1,136,408	\$1,344,361	\$717,390	\$1,076,775	\$633,418	\$960,851	\$1,789,361	\$1,401,104	\$12,512,771
2022	\$1,588,446	\$1,336,362	\$1,757,017	\$2,366,115	\$2,456,447	\$1,509,226	\$1,670,647	\$1,150,611	\$760,366	\$1,298,629	\$1,355,712	\$1,626,166	\$18,875,743
% of 2022 Total	8.4%	7.1%	9.3%	12.5%	13.0%	8.0%	8.9%	6.1%	4.0%	6.9%	7.2%	8.6%	100.0%
Avg % of 10yr Total	6.7%	8.8%	11.7%	13.0%	11.0%	8.2%	6.3%	5.2%	4.5%	6.6%	9.1%	9.0%	100.0%

Source: City of Scottsdale, Tax Audit Department

Note: Sales tax is normally reported to the City the month after receipt. The figures listed above generally reflect activity from the previous month, and do not account for late payments.
Note: The Transaction Privilege Tax rate was increased to 1.75% and the Use Tax rate was increased to 1.55% on February 1, 2019.

SALES TAX RECEIPTS



TRENDS IN ROOM INVENTORY

Room Supply

Table 4 reflects hotel room supply inventory for the study market area since 2013. From 2013 through 2016 there was an decrease in room inventory. Room inventory dramatically increased in both 2017 and 2020. The Scottsdale market area increased by 1,391 rooms over the last 10 years.

Table 5a shows the room inventory of the City of Scottsdale by category.

Table 5b shows the room inventory of the Town of Paradise Valley by category.

Table 4				
Hotel Inventory				
Total Hotel Market Area Properties				
Year	City of Scottsdale	Town of Paradise Valley	Other Market Area Hotels	Total
2013	9,391	1,864	5,490	16,745
2014	8,997	1,695	5,609	16,301
2015	8,971	1,697	5,593	16,261
2016	8,727	1,693	5,640	16,060
2017	8,875	2,090	5,624	16,589
2018	8,825	2,074	5,605	16,504
2019	8,758	2,108	5,576	16,442
2020	9,164	2,108	6,142	17,414
2021	9,354	2,333	6,091	17,778
2022	9,591	2,323	6,222	18,136

Source: Smith Travel Research (STR); City of Scottsdale, Tourism & Events Department
Note: Only hotel properties with 25 or more rooms are included

Table 5a			Table 5b			Table 5c		
Room Inventory by Category* City of Scottsdale - 2022			Room Inventory by Category* Town of Paradise Valley - 2022			Room Inventory by Category* Market Areas - 2022		
Category	# of Rooms	% of Market	Category	# of Rooms	% of Market	Category	# of Rooms	% of Market
Resort	3,615	38%	Resort	2,254	97%	Resort	3,518	57%
Full Service	3,060	32%	Full Service	43	2%	Full Service	1,067	17%
Limited Service	2,916	30%	Limited Service	26	1%	Limited Service	1,637	26%
Total	9,591	100%	Total	2,323	100%	Total	6,222	100%

Source: Smith Travel Research, Tourism & Events Department

Property Inventory

Table 6 lists the existing hotel properties within the Scottsdale market area. The properties are classified by facility type, and room information.

Note: Hotel classifications are Resort, Full Service, and Limited Service.

Table 6		
Resort Hotel Properties		
Scottsdale/Paradise Valley Market Area		
Property Name	# of Rooms	Location
CIVANA Wellness Resort and Spa	176	Carefree
Adero Scottsdale, Autograph Collections	177	Fountain Hills
Andaz Scottsdale Resort & Bungalows	185	Paradise Valley
Doubletree Resort by Hilton Hotel Paradise Valley Scottsdale	378	Paradise Valley
JW Marriott Camelback Inn Scottsdale Resort & Spa	453	Paradise Valley
Mountain Shadows Resort	217	Paradise Valley
Omni Scottsdale Resort & Spa at Montelucia	293	Paradise Valley
Sanctuary Resort on Camelback	109	Paradise Valley
Scottsdale Plaza Resort	404	Paradise Valley
The Ritz-Carlton Paradise Valley, The Palmeraie	215	Paradise Valley
Canyon Suites at the Phoenician	60	Phoenix
JW Marriott Phoenix Desert Ridge Resort & Spa	950	Phoenix
Orange Tree Golf Resort (Phoenix)	160	Phoenix
The Phoenician, A Luxury Collection Resort	645	Phoenix
The Unbound Collection Royal Palms Resort & Spa (Phoenix)	119	Phoenix
Westin Kierland Resort & Spa (Phoenix)	735	Phoenix
Boulders Resort & Spa, Curio Collection by Hilton	160	Scottsdale
Fairmont Scottsdale Princess	750	Scottsdale
Four Seasons Resort Scottsdale at Troon North	210	Scottsdale
Hotel Valley Ho	241	Scottsdale
Hyatt Regency Scottsdale Resort & Spa at Gainey Ranch	493	Scottsdale
Scottsdale Links Resort	218	Scottsdale
Scottsdale Marriott at McDowell Mountains	266	Scottsdale
Scottsdale Villa Mirage	224	Scottsdale
Sonesta Suites Scottsdale Gainey Ranch	162	Scottsdale
The McCormick Scottsdale	125	Scottsdale
The Scott Resort & Spa	204	Scottsdale
The Scottsdale Resort at McCormick Ranch	326	Scottsdale
W Hotel Scottsdale	236	Scottsdale
Talking Stick Resort (SRPMIC)	496	SRPMIC

Source: City of Scottsdale, Tourism & Events Department

Table 6 (Continued)

Full Service Hotel Properties Scottsdale/Paradise Valley Market Area

Property Name	# of Rooms	Location
Wekopa Casino Resort	246	Fort McDowell
Inn at Eagle Mountain	37	Fountain Hills
The Hermosa Inn, a boutique hideaway	43	Paradise Valley
AC Hotel by Marriott Scottsdale North	165	Phoenix
Scottsdale Camelback Resort (Phx)	111	Phoenix
3 Palms Hotel	130	Scottsdale
Aiden By Best Western @ Scottsdale North	164	Scottsdale
aloft Scottsdale	126	Scottsdale
Best Western Plus Scottsdale Thunderbird Suites	120	Scottsdale
Best Western Plus Sundial	54	Scottsdale
Canopy by Hilton Scottsdale Old Town	178	Scottsdale
Element Scottsdale at SkySong	157	Scottsdale
Embassy Suites by Hilton Scottsdale Resort	312	Scottsdale
Hilton Garden Inn Scottsdale North/Perimeter Center	122	Scottsdale
Hilton Garden Inn Scottsdale Old Town	199	Scottsdale
Hilton North Scottsdale at Cavasson	237	Scottsdale
Hilton Scottsdale Resort & Villas	235	Scottsdale
Hyatt Place / Hyatt House North Scottsdale	229	Scottsdale
Scottsdale Marriott Old Town	243	Scottsdale
Senna House Scottsdale, Curio Collection by Hilton	169	Scottsdale
Sheraton's Desert Oasis	300	Scottsdale
Worldmark Scottsdale	85	Scottsdale
Courtyard by Marriott Scottsdale Salt River	158	SRPMIC
Great Wolf Lodge Scottsdale	350	SRPMIC

Source: City of Scottsdale, Tourism & Events Department



Table 6 (Continued)**Limited Service Hotel Properties
Scottsdale/Paradise Valley Market Area**

Property Name	# of Rooms	Location
Comfort Inn - Fountain Hills	48	Fountain Hills
Fountain Park Hotel, BW Signature Collection	60	Fountain Hills
Smoke Tree Resort	26	Paradise Valley
Courtyard by Marriott Scottsdale North	153	Phoenix
Hampton Inn/Suites (North)	123	Phoenix
Sleep Inn At North Scottsdale Road	107	Phoenix
SpringHill Suites Scottsdale North	121	Phoenix
SureStay Plus Hotel by Best Western North Scottsdale	131	Phoenix
Comfort Suites Old Town Scottsdale	60	Scottsdale
Courtyard Scottsdale Old Town	180	Scottsdale
Extended Stay America - Phoenix - Scottsdale	106	Scottsdale
Extended Stay America - Phoenix - Scottsdale - North	120	Scottsdale
Extended Stay America - Phoenix - Scottsdale - Old Town	121	Scottsdale
Hampton by Hilton Inn & Suites Phoenix/Scottsdale on Shea	150	Scottsdale
Holiday Inn & Suites Scottsdale North - Airpark	117	Scottsdale
Holiday Inn Express & Suites Scottsdale - Old Town	169	Scottsdale
Holiday Inn Express Scottsdale North	122	Scottsdale
Hotel Adeline, Scottsdale, A Tribute Portfolio Hotel	213	Scottsdale
Hyatt House Scottsdale/Old Town	164	Scottsdale
Hyatt Place Scottsdale/Old Town	126	Scottsdale
Independence 47 Hotel	47	Scottsdale
La Quinta Inns & Suites by Wyndham Phoenix Scottsdale	140	Scottsdale
Metro Scottsdale	114	Scottsdale
Motel 6 Old Town Scottsdale	122	Scottsdale
Residence Inn by Marriott Scottsdale North	120	Scottsdale
Scottsdale Park Suites	95	Scottsdale
Sonder the Mariposa	60	Scottsdale
Sonder the Monarch	194	Scottsdale
Sonesta ES Suites Scottsdale - Paradise Valley	122	Scottsdale
Sonesta Select Scottsdale at Mayo Clinic	124	Scottsdale
Sonesta Simply Suites Scottsdale North	130	Scottsdale
Hampton Inn/Suites Scottsdale Riverwalk	101	SRPMIC
Staybridge Suites Scottsdale - Talking Stick	131	SRPMIC
aloft Tempe	136	Tempe
Comfort Inn & Suites Tempe	82	Tempe
Hampton Inn & Suites (Tempe)	117	Tempe
Holiday Inn Express & Suites Phoenix Tempe	103	Tempe
Motel 6 (Tempe)	106	Tempe
Post 1429	118	Tempe

Source: City of Scottsdale, Tourism & Events Department

AVERAGE ROOM RATES AND OCCUPANCY

Average Room Rates

The Tourism and Events Department uses data from Smith Travel Research (STR). This research provides the city an indication of trending and competitive performance.

Chart 1 illustrates the average room rates within the Scottsdale Market area since 2013. Table 7 represents the same data. Smith Travel Research reported the average room rate for Scottsdale/ Paradise Valley Market area hotels in 2022 was \$273.91 up from \$228.49 in 2021.

Average Occupancy

According to STR, hotels in the Scottsdale/Paradise Valley Market area experienced an occupancy rate of 65 percent in 2022, an increase from 57.6 percent in 2021.

Occupancy rates for the last ten years are shown on Table 7 (p. 20) & illustrated in Chart 1.

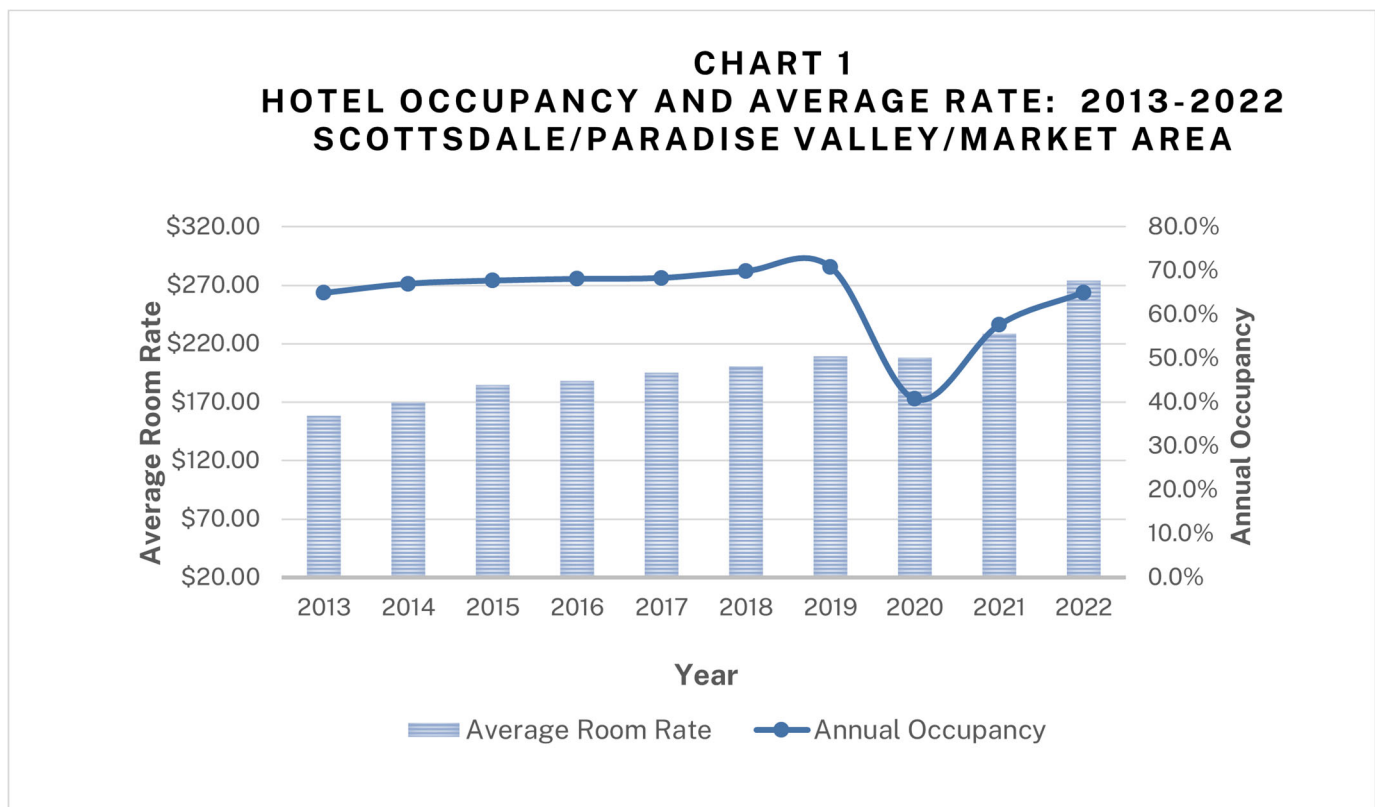


Table 7

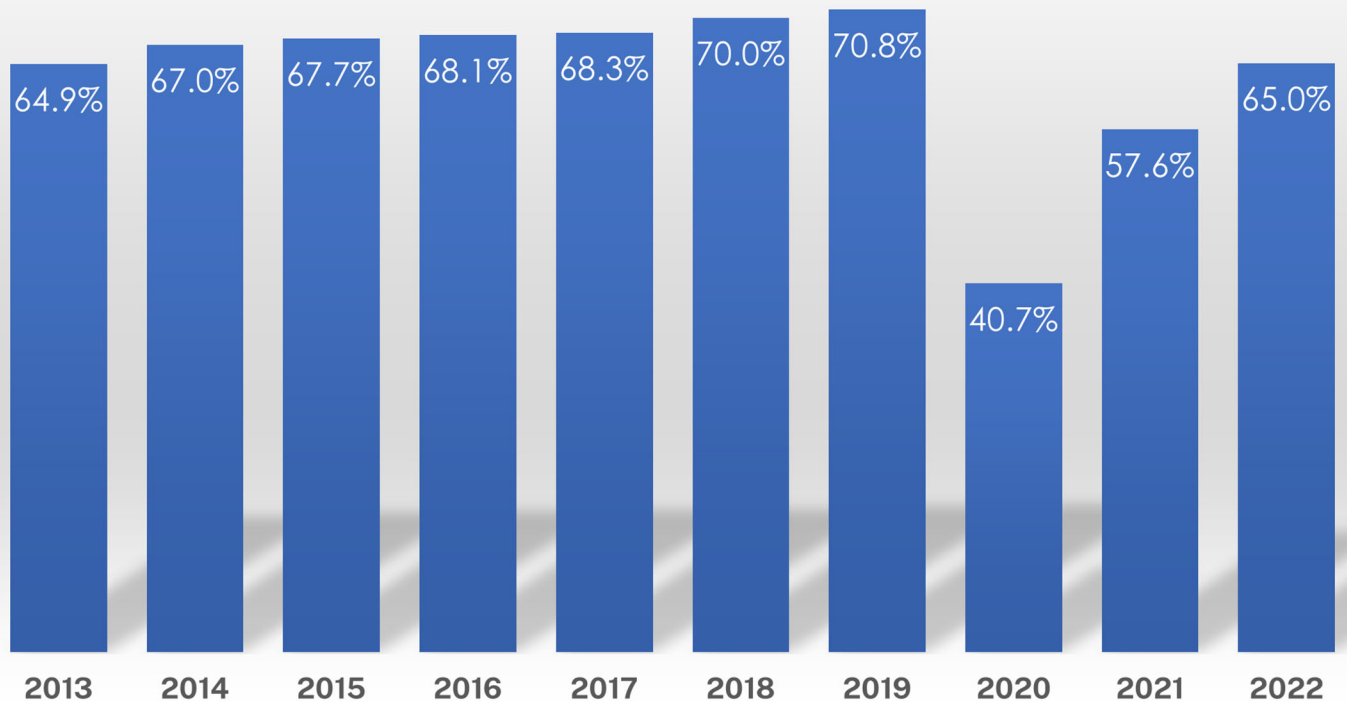
Occupancy & Average Rate
Scottsdale/Paradise Valley Market Area

Year	Avg. Room Rate	x	Occupied Rooms	=	Gross Room Revenue	Room Supply	Annual Occupancy*
2013	\$158.07	x	3,019,156	=	\$477,237,989	4,653,621	64.9%
2014	\$169.90	x	3,063,936	=	\$520,562,726	4,573,697	67.0%
2015	\$184.85	x	2,947,480	=	\$544,841,678	4,354,775	67.7%
2016	\$188.29	x	2,960,277	=	\$557,390,556	4,349,800	68.1%
2017	\$195.03	x	2,998,666	=	\$584,829,830	4,389,632	68.3%
2018	\$200.85	x	3,127,541	=	\$628,166,610	4,470,651	70.0%
2019	\$208.94	x	3,125,955	=	\$653,137,038	4,412,163	70.8%
2020	\$207.96	x	1,717,768	=	\$357,227,033	4,224,462	40.7%
2021	\$228.49	x	2,672,358	=	\$610,607,079	4,637,045	57.6%
2022	\$273.91	x	2,967,474	=	\$812,820,803	4,567,915	65.0%

Source: Smith Travel Research

*Occupied Rooms divided by Room Supply

Annual Occupancy Rate Market Area Hotels



ROOM REVENUES VERSUS TOTAL HOTEL REVENUES

Table 8 compares the total room revenues to total hotel revenues for Scottsdale hotels, thereby providing a means of assessing the relative importance of room revenues compared to all other revenue sources within the hotels (food, beverage, gift shop, and recreational sales).

The percentage of room revenue to total hotel revenues for the City of Scottsdale in 2022 was 60.4 percent. Over the past ten years, room revenues provided an average of 60.3 percent of total hotel revenues at Scottsdale properties. Since 2013, room revenues as a percentage of total hotel revenues have ranged from 57.6 to 62.9 percent.

Table 8			
Room Revenue vs. Total Hotel Revenue*			
City of Scottsdale			
<u>Year</u>	<u>Total Room Revenue</u>	<u>Total Hotel Revenue</u>	<u>Room Revenue as % of Hotel Revenue</u>
2013	\$279,154,011	\$458,400,027	60.9%
2014	\$305,272,815	\$499,758,658	61.1%
2015	\$331,569,021	\$539,561,719	61.5%
2016	\$351,842,465	\$559,789,177	62.9%
2017	\$360,302,284	\$623,600,905	57.8%
2018	\$383,138,481	\$664,803,587	57.6%
2019	\$402,492,018	\$690,227,340	58.3%
2020	\$227,581,438	\$364,817,479	62.4%
2021	\$360,546,499	\$600,230,019	60.1%
2022	\$526,557,715	\$871,868,911	60.4%

Source: City of Scottsdale, Financial Services Department, Tax Audit Division
*Based on revenues generated at properties within the City of Scottsdale

In 2022, resort properties comprised the largest segment of bed tax (59%), privilege tax (67%) and total revenues paid (62%). Resorts comprise 38% of Scottsdale properties. *Table 9* and *Chart 2* present a comparison of total room revenues, total bed tax paid, and total privilege tax paid for Resort, Full Service, and Limited Service hotel/motels for calendar year 2022.

Note: Tables 8 and 9 refer solely to properties within Scottsdale. These properties are listed in the Scottsdale section of Table 1 page 8.

Table 9			
Hotel Revenue Streams			
City of Scottsdale			
For 12 months ending December 2022			
	Total Revenues Paid	Bed Tax Paid	Privilege Tax Paid
Resort	62%	59%	67%
Full Service	15%	15%	14%
Limited Service	23%	26%	19%
Total	100%	100%	100%

Source: City of Scottsdale, Financial Services Department, Tax Audit Division
 Note: Percentages may not add up to 100% due to rounding

■ Resort ■ Full Service ■ Limited Service
CHART 2 - HOTEL REVENUE STREAMS

