



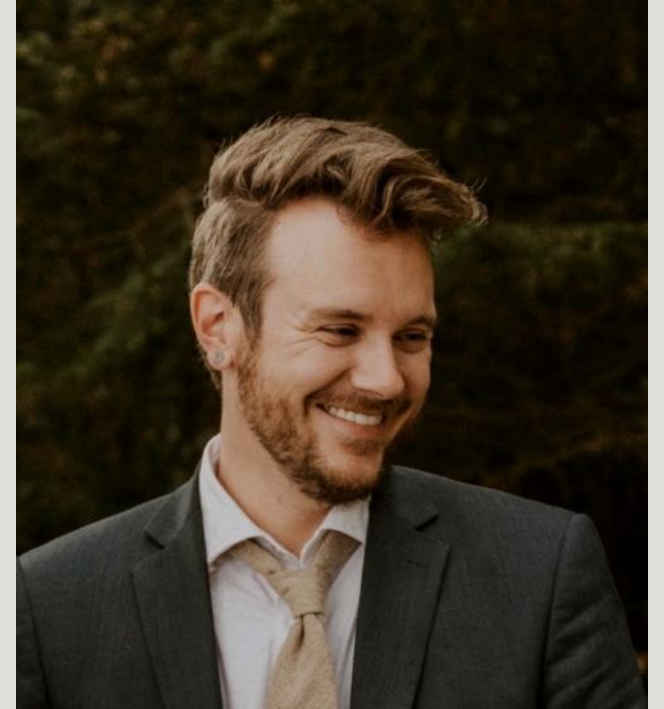
CITY OF SEDONA

TOURISM OFFICE

Lodging Council Meeting
September 8, 2026 Meeting

Introducing Adam Hall

- Adam Hall started on July 6 as our new Destination Development Coordinator
- Adam joins us after 9 years with L'Auberge de Sedona where he served as Director of the Front Office



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FY27 Budget Update

- City Council approved the FY27 budget in June, which included our base budget and the \$300k Decision Package
 - \$150k was added to our base budget for year-round advertising to high-net worth individual (\$100k) and for strategic event marketing (\$50k)
 - \$150k was earmarked for tourism marketing within General Fund contingency funds
- City Council requested that we present an industry performance framework and associated performance thresholds for accessing the contingency funds in FY27



Pocket Fire Mitigation Activities

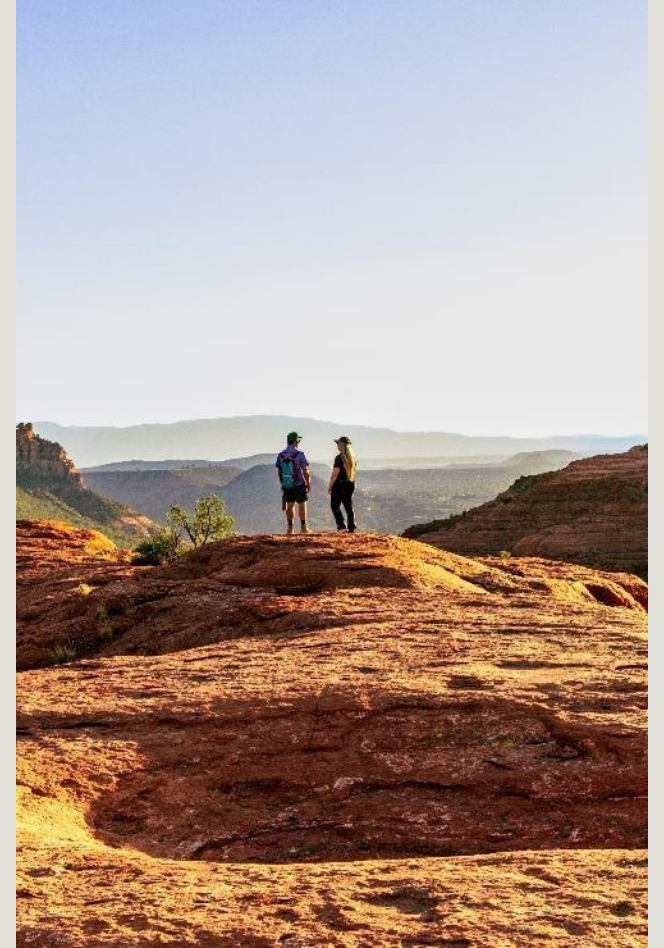
- My experience with DMO Crisis Management is *Prevention, Mitigation, and Recovery*
- Activities we conducted after the Pocket Fire started on June 19 included:
 - Our Summer 2026 campaign remained active
 - A banner message was added to ScenicSedona.com
 - Information was added to our Getting Around page
 - The AllTrails maps were updated to show open trails
 - Extensive listening with local businesses



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July 14 City Council Meeting

- We were already on the July 14 agenda to present the industry performance framework
- As a result of the Pocket Fire, we expanded our presentation to include a crisis management threshold



#1 Industry Performance Framework

- This is based on primary and secondary data (e.g. lodging performance, spending, business input, etc.)
- Not all data is available in real time
- Year-over-year comparisons are less relevant when the previous year's performance was poor
 - For 2026, we proposed comparisons to 2024 instead of 2025
 - But if 2026 is a strong year, then 2027 will be measured against it



The Traffic Light System

- We proposed a traffic light system to analyze and report on tourism industry performance:
 - **Green**: Flat or positive performance with no additional paid advertising funds deployed
 - **Yellow**: Performance is declining and City staff begin a deeper investigation into industry performance
 - **Red**: A definitive trend of declining industry performance has been identified, and City staff begin working with the City Manager to explore utilization of contingency funds



Green Light

- Overnight demand and booking pace are flat or increasing within weekly hotel and short-term rental performance data
- A majority of neutral or positive responses are being submitted to the Tourism Business Performance & Outlook Survey



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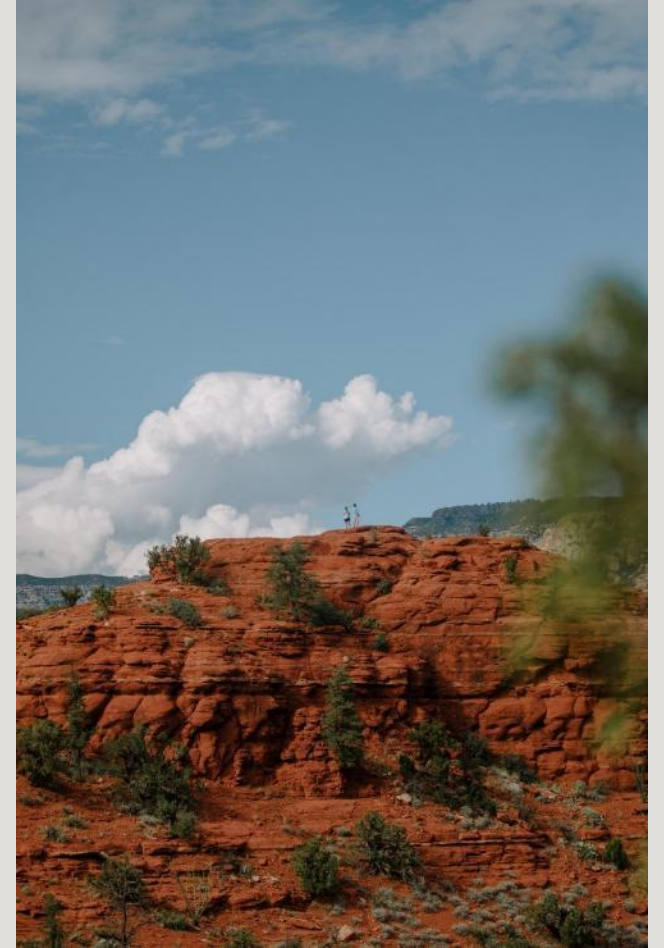
Yellow Light

- Overnight demand and booking pace is marginally declining within weekly hotel and short-term rental performance data
 - For example, 2-3 weeks of continued declines in weekly overnight demand
- A majority of neutral or negative responses are submitted to the Tourism Business Performance & Outlook Survey
- ADOT vehicle data shows flat or declining vehicle volumes



Red Light

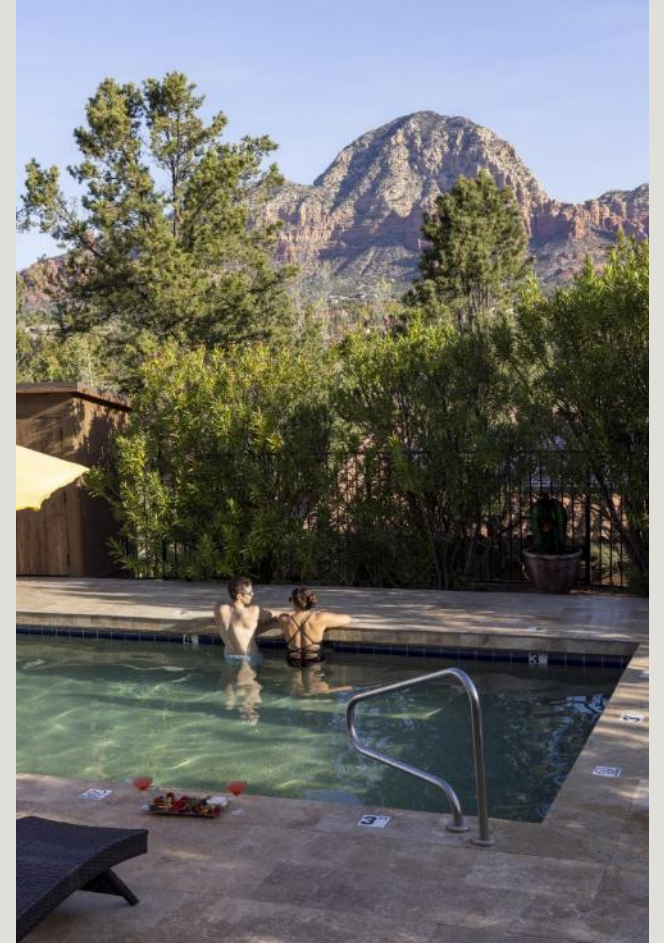
- Overnight demand is down 3% or more for 4+ weeks
- A majority of negative responses are submitted to the Tourism Business Performance & Outlook Survey
- Focus group discussions with tourism industry leaders validate the trend of declining industry performance
- Visa Destination Insights data shows a decline in spending within the Tourism Program's destination marketing campaign markets
- ADOT vehicle data shows flat or declining vehicle volumes



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#2 Crisis Management Framework

- An event has occurred that caused immediate impact to visitation and/or reputational damage to the City
- Supporting factors include:
 - ADOT vehicle traffic shows a decline
 - Weekly hotel performance shows a decline
 - Short-Term rental listing performance shows a decline
 - Business input validates the impact



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Pocket Fire Recovery Marketing

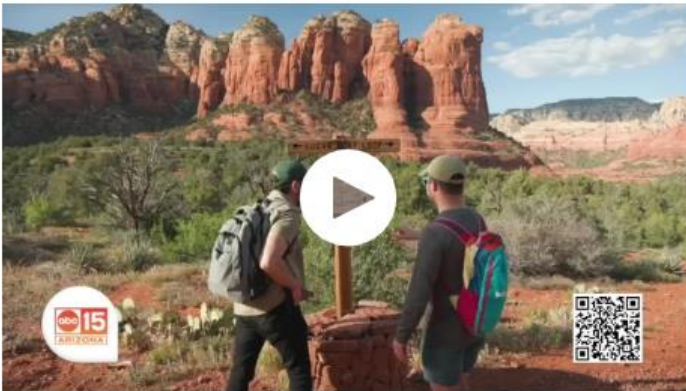
- City Council approved both proposals and granted the City Manager authority to release contingency funds
- \$50,000 was released on July 15 and agreements were put into place with DVA, ABC15, and 12News
 - \$30,000: Increased campaign spend in Phoenix and Tucson and extended flight through September
 - \$20,000: Run summer campaign video on evening and morning news and run 9 segments through September

**Additional work was conducted to garner earned media with other news outlets*



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See why this is the perfect time to visit Sedona!



{{SL Advertiser}} Looking for some fun for the family in cooler temps? It's a great time to visit Sedona! To learn more, go to ScenicSedona.com

Posted 7:34 AM, Jul 28, 2026 and last updated 10:17 AM, Jul 28, 2026

The City of Sedona is an advertiser of Sonoran Living.

Sedona "clears the air" on the Pocket Fire

Sedona has good news for visitors: Sedona is the same now as you've always known and loved it. Local businesses and attractions are open and ready to welcome you!

As of the end of July 2026, the [Pocket Fire](#) that began June 19 is over 95% contained with cooler, favorable conditions in the near forecast. Air quality is [good](#) and most of Sedona's scenic trails are accessible to the public.

The City, the [Sedona Tourism Office](#) and area businesses want travelers to know that local hotels, restaurants, shops, galleries, spas, attractions and tour operators welcome guests to enjoy all that Sedona has to offer.

Summer in Sedona

Summer in Sedona is in its normal rhythm, with cooler mornings and evenings ideal for hiking, scenic overlooks, guided adventures and sunset views.

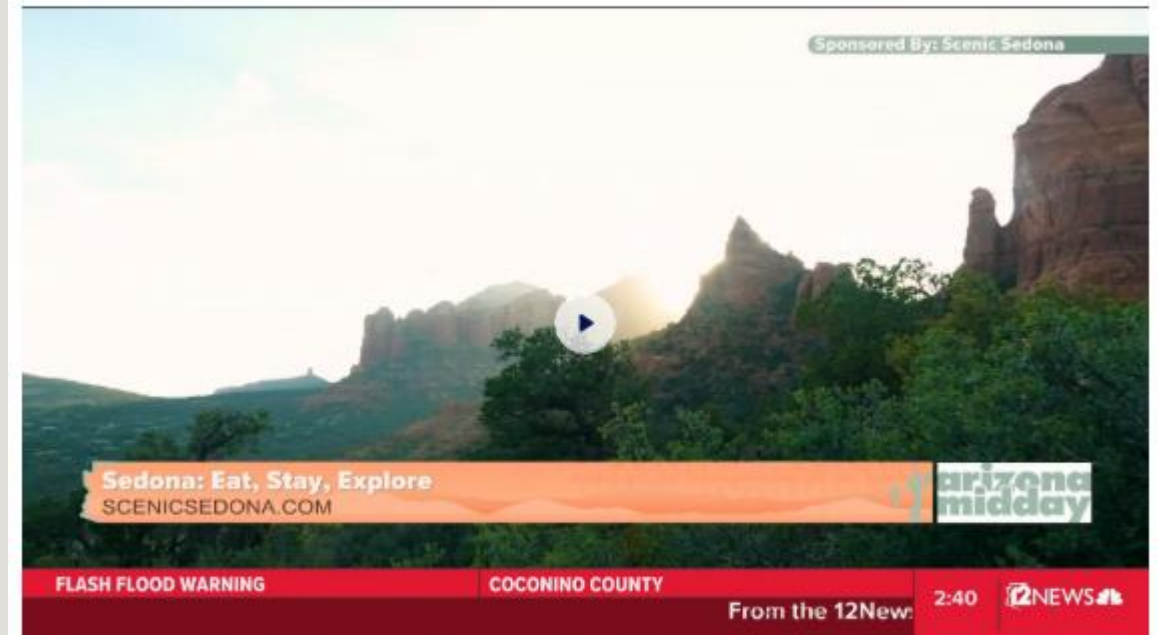
During the warmest part of the day, Sedona offers much to explore beyond the



Interested in appearing on Sonoran Living? Click here to find out how!



Sponsored: Sedona is Welcoming Visitors All Summer Long to Explore the Red Rocks and More!



Eat, Stay and Explore Beautiful Sedona this Summer, One of the most scenic places in Arizona

Author: 12news.com

Published: 7:51 AM PDT July 29, 2026

Updated: 7:51 AM PDT July 29, 2026



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Winter 2026/2027 Campaign Strategy

Winter 2026/2027 Campaign Strategy

- Target campaign timeline:
 - Flight markets: October 1, 2026 to February 1, 2027
 - Drive markets: October 15, 2026 to February 15, 2027
- This would be 16 days earlier than Winter 2025/2026
- Drive markets
 - Phoenix
 - Tucson
 - Los Angeles
 - San Diego
 - Las Vegas
- Flight Markets
 - Denver
 - Seattle
 - Chicago
 - San Francisco
 - Minneapolis
 - New York



Winter 2026/2027 Campaign Budget

Digital Marketing Strategies	Updated
Attribution-based website ads	\$65,000
Attribution-based CTV ads	\$34,400
Paid Google search	\$12,690
ChatGPT Search	\$1,410
Meta (out-out-market attraction messaging)	\$28,000
Meta (in-market education/stewardship messaging with a 25-mile radius and Phoenix)	\$15,000
TOTAL BUDGET	\$156,500



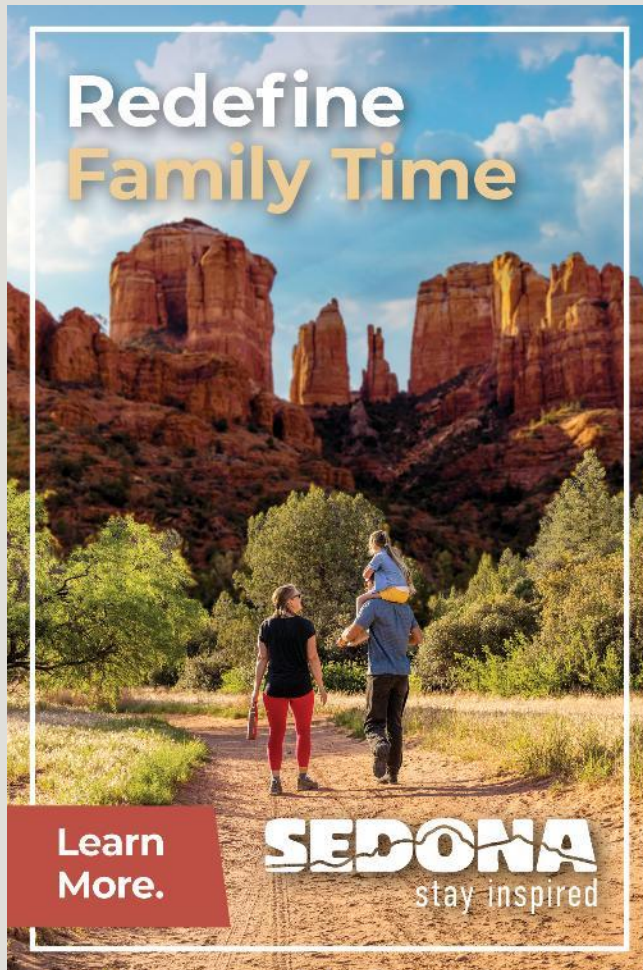
Target Audience Personas

The Personas we'll market to are:

- the Eco-Conscious Explorer
- the Wellness Seeker
- the Adventure Enthusiast
- the Cultural Explorer
- the Uninformed Adventurer

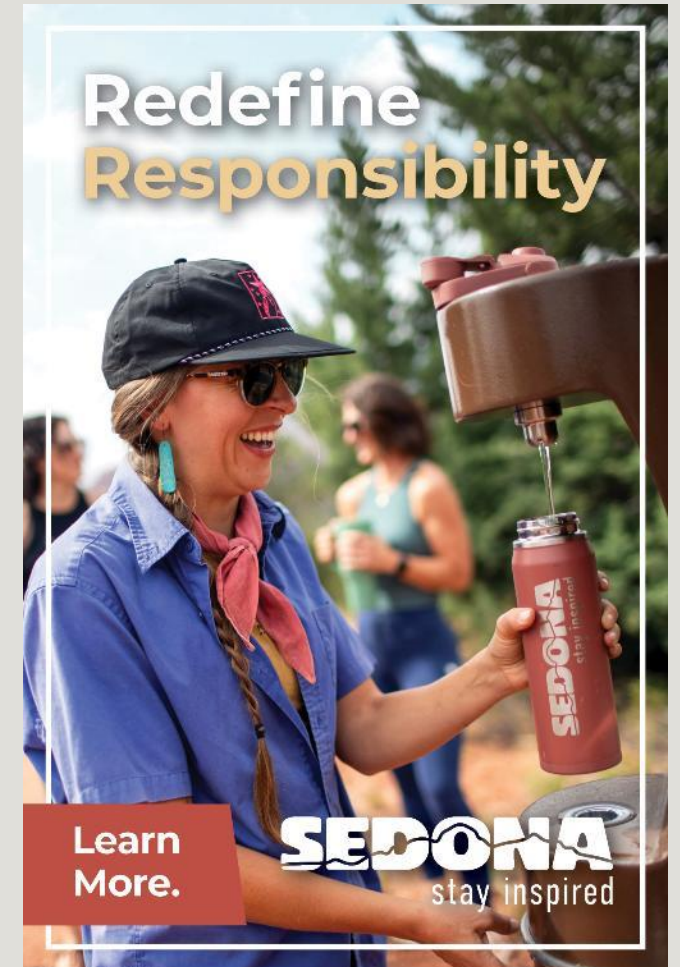
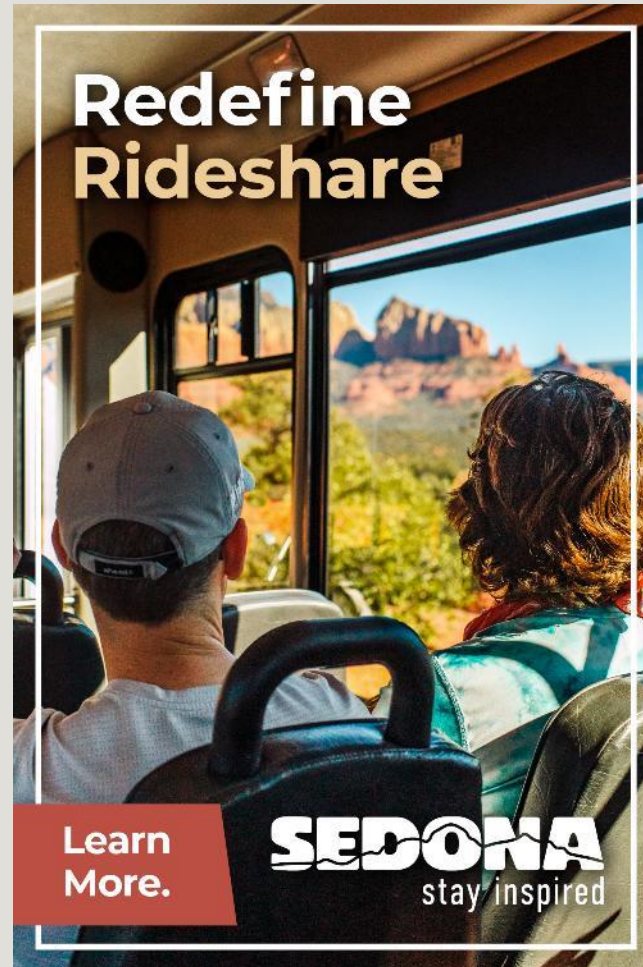
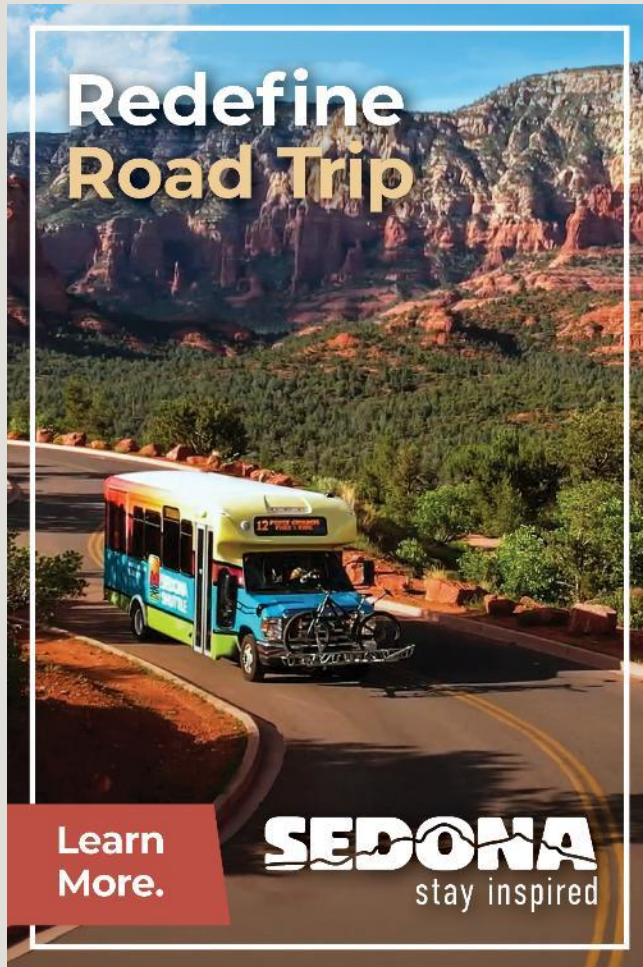


Sample Creative



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Sample Creative

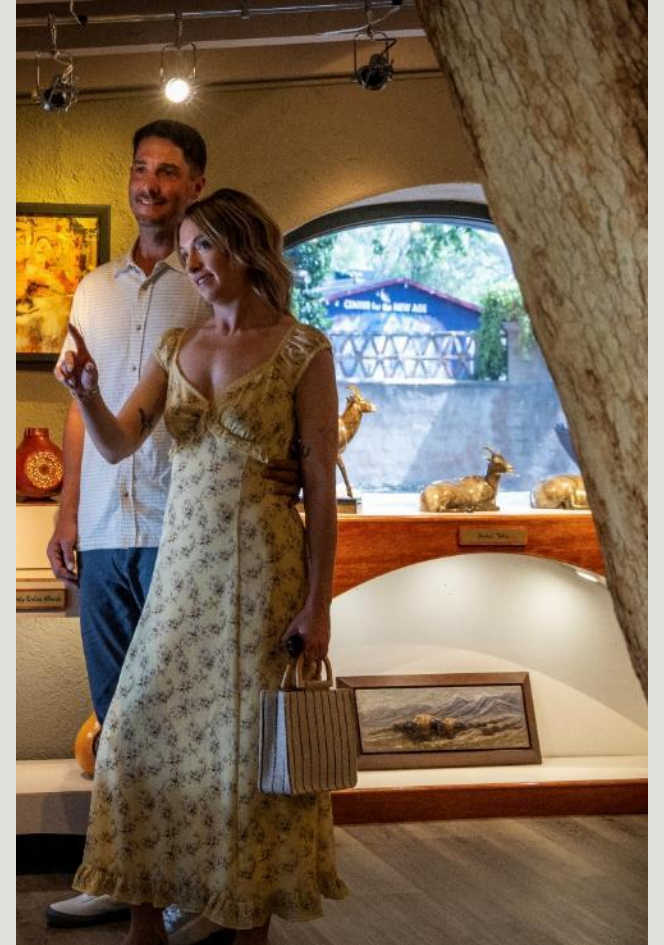




Year-Round High-Net-Worth Campaign Strategy

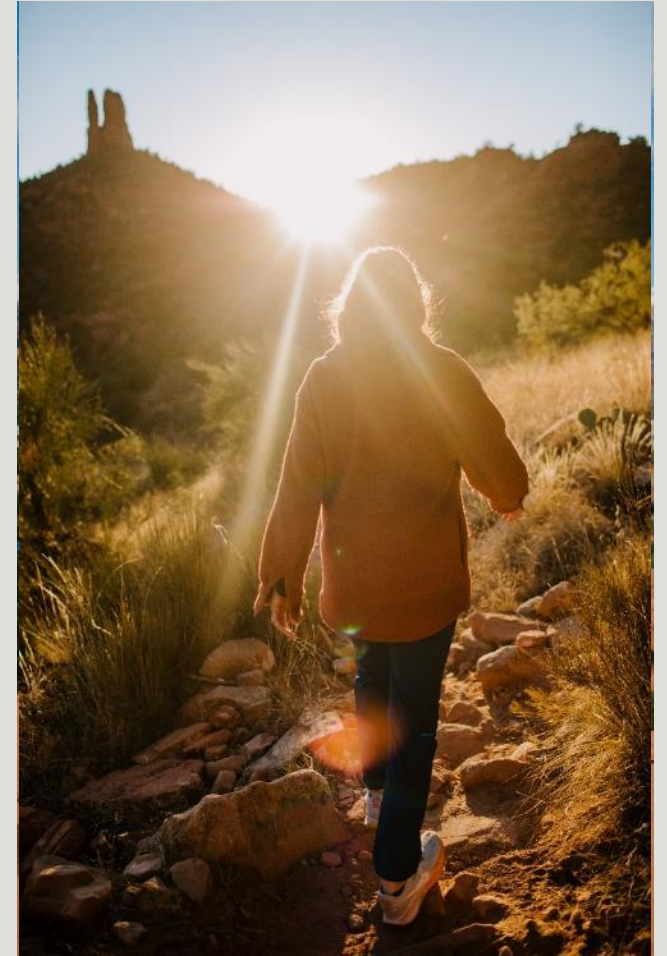
Context

- Although our advertising always targeted high-income households, we started piloting targeting advertising to high-net-worth individuals (HNW) last winter
 - This audience spends more, plans differently, and can typically stay longer
- We continued this pilot into Summer 2026 and created advertising specific to this audience
- For FY27, City Council approved \$100,000 for year-round high-net-worth advertising

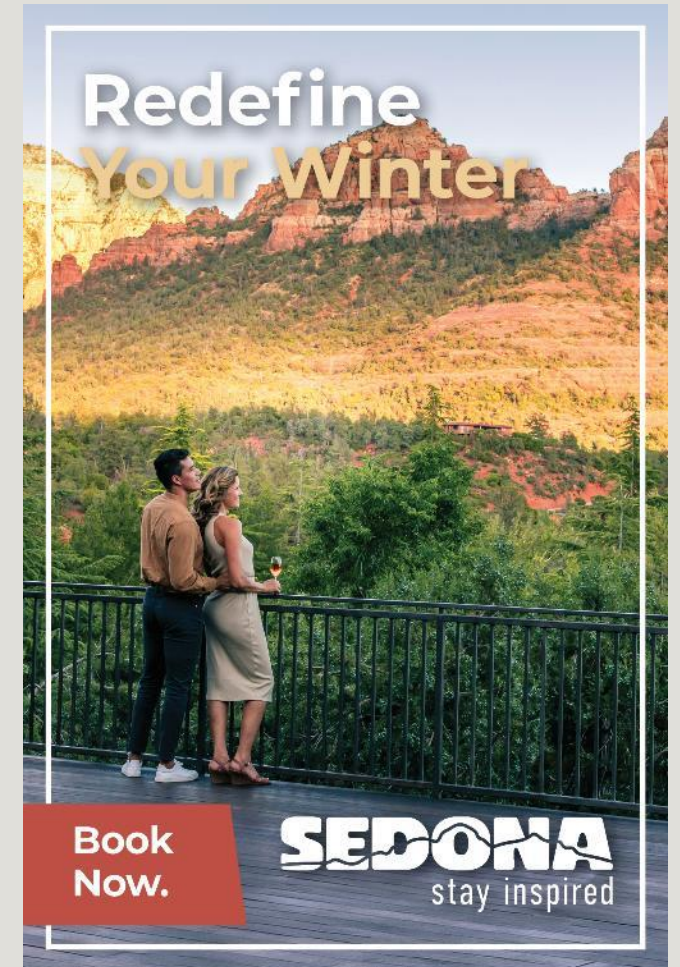
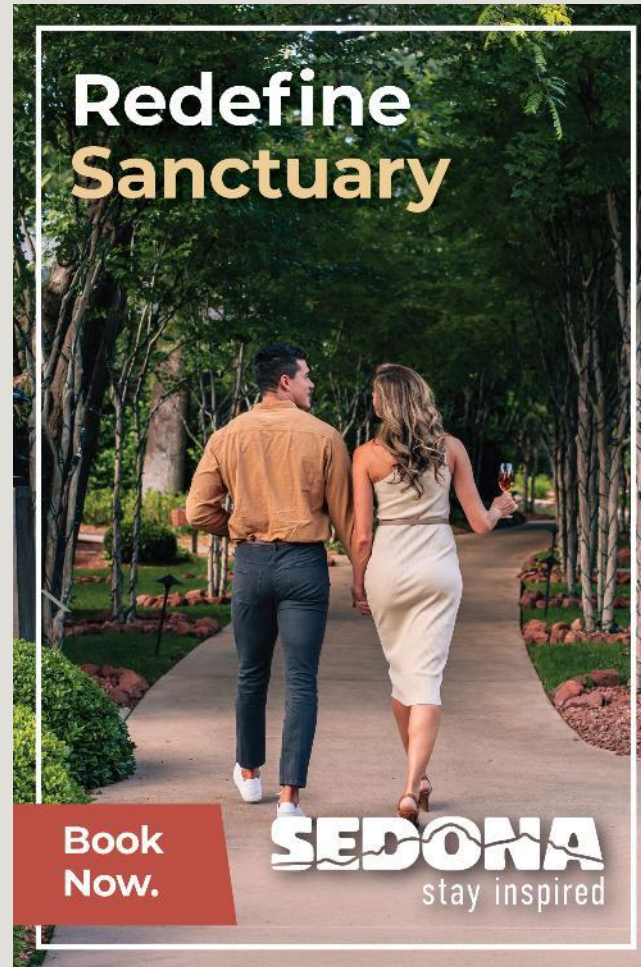


Next Steps

- With Council approval, activate the HNW strategy starting October 1 using winter campaign creative
- Develop new campaign concept for Feb. 16th



Sample Creative



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Lodging Summary

June 2026



Date
June 2026

Compare to
Previous Year

Location Hotels
Sedona+

Location Short Term Rentals
Vacation Area - Residential Zone

Hotel Performance (Sedona+)

Source: STR

	Occupancy	ADR	RevPAR	Supply	Demand	Revenue
Jun 2026	64.1%	\$297.74	\$190.91	70.8K	45.4K	\$13.5M
YOY % Change	-1.7%	2.0%	0.3%	6.4%	4.6%	6.7%
CYTD 2026	71.3%	\$396.37	\$282.72	409.8K	292.3K	\$115.9M
CYTD YOY % Change	2.6%	6.0%	8.8%	-0.8%	1.8%	7.9%

Short Term Vacation Rental Performance - Scraped AirBnB Data

Source: KeyData (Vacation Area - Residential Zone)

	Occupancy	ADR	RevPAR	Supply	Demand	Revenue
Jun 2026	42.4%	\$473.99	\$200.91	38.0K	16.1K	\$7.6M
YOY % Change	4.3%	5.6%	10.1%	6.3%	10.9%	17.0%
CYTD 2026	56.4%	\$528.39	\$297.80	223.5K	126.0K	\$66.6M
CYTD YOY % Change	4.2%	6.6%	11.1%	3.5%	7.8%	14.9%

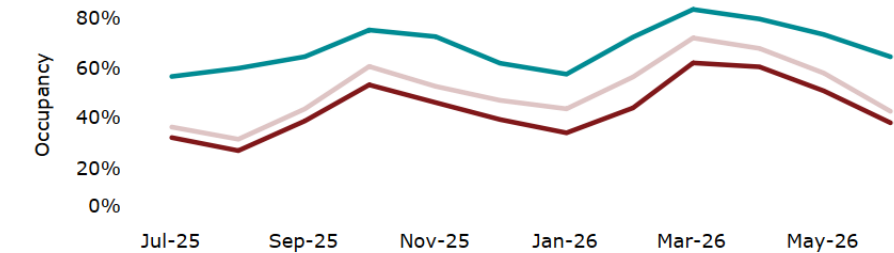
Short Term Vacation Rental Performance - Scraped VRBO Data

Source: KeyData (Vacation Area - Residential Zone)

	Occupancy	ADR	RevPAR	Supply	Demand	Revenue
Jun 2026	37.8%	\$512.06	\$193.57	18.1K	6.8K	\$3.5M
YOY % Change	-0.2%	-0.4%	-0.5%	-9.5%	-9.7%	-10.0%
CYTD 2026	47.9%	\$582.86	\$279.04	111.5K	53.4K	\$31.1M
CYTD YOY % Change	-3.7%	3.4%	-0.5%	-10.7%	-14.1%	-11.2%

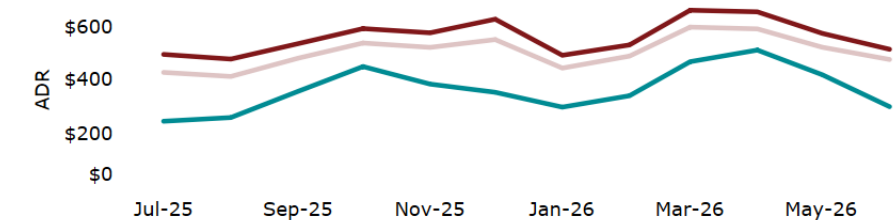
Occupancy by Month

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



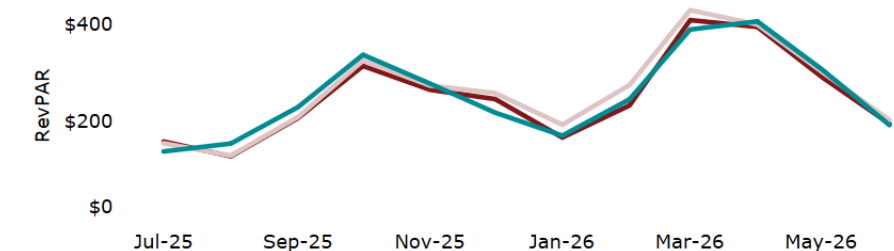
ADR by Month

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



RevPAR by Month

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



Lodging Summary

July 2026



Date
July 2026

Compare to
Previous Year

Location Hotels
Sedona+

Location Short Term Rentals
Vacation Area - Residential Zone

Hotel Performance (Sedona+)

Source: STR

	Occupancy	ADR	RevPAR	Supply	Demand	Revenue
Jul 2026	50.5%	\$241.13	\$121.83	73.1K	36.9K	\$8.9M
YOY % Change	-10.2%	-0.9%	-11.0%	6.4%	-4.5%	-5.3%
CYTD 2026	68.2%	\$378.95	\$258.36	483.0K	329.3K	\$124.8M
CYTD YOY % Change	0.8%	5.8%	6.6%	0.2%	1.0%	6.8%

Short Term Vacation Rental Performance - Scraped AirBnB Data

Source: KeyData (Vacation Area - Residential Zone)

	Occupancy	ADR	RevPAR	Supply	Demand	Revenue
Jul 2026	36.9%	\$437.16	\$161.40	38.5K	14.2K	\$6.2M
YOY % Change	2.3%	2.7%	5.1%	2.8%	5.2%	8.0%
CYTD 2026	53.5%	\$519.14	\$277.76	262.0K	140.2K	\$72.8M
CYTD YOY % Change	4.0%	6.3%	10.6%	3.4%	7.5%	14.3%

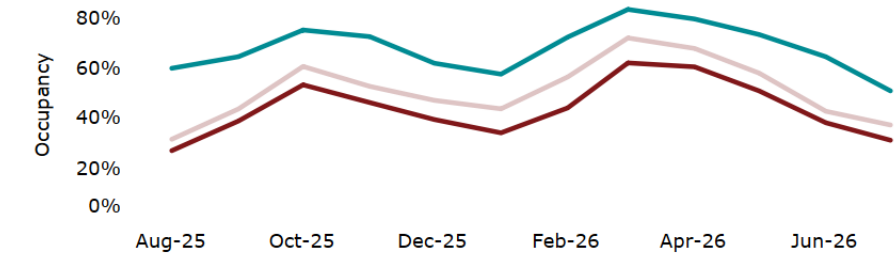
Short Term Vacation Rental Performance - Scraped VRBO Data

Source: KeyData (Vacation Area - Residential Zone)

	Occupancy	ADR	RevPAR	Supply	Demand	Revenue
Jul 2026	30.8%	\$500.47	\$154.38	18.7K	5.8K	\$2.9M
YOY % Change	-3.3%	1.5%	-1.8%	-9.2%	-12.1%	-10.8%
CYTD 2026	45.4%	\$574.82	\$261.14	130.2K	59.2K	\$34.0M
CYTD YOY % Change	-3.8%	3.2%	-0.7%	-10.5%	-13.9%	-11.1%

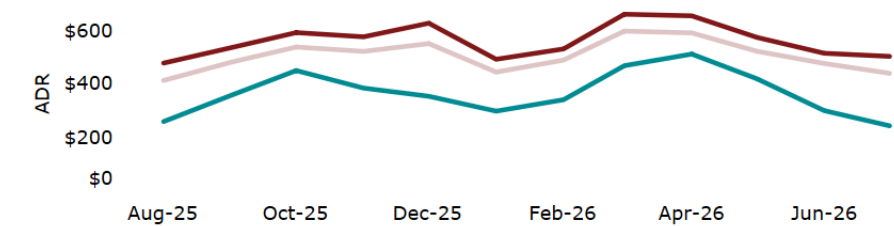
Occupancy by Month

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



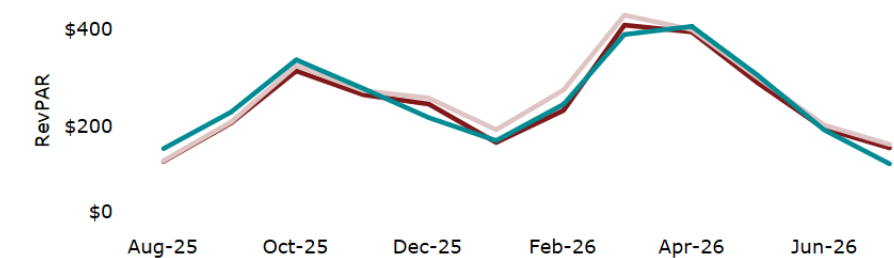
ADR by Month

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



RevPAR by Month

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



×

Filters

Market
Sedona+

Day Of Week
All

Start
8/1/2026

End
8/29/2026

Compare to
☒ Same-time-last-year
☐ Custom Comp. Range

Custom Comp. Range

Start
8/1/2025

End
8/30/2025

Measure for Trend
☒ Occupancy
☐ ADR
☐ RevPAR
☐ Supply
☐ Demand
☐ Revenue

Hide Day-of-Week Tables

Tips

Date range must be 365 days or shorter to properly show YOY % change figures.

When using the Custom Comp. Range setting be sure that date ranges do not overlap. YOY % changes will not show if ranges overlap.

Close day-of-week tables and the filter pane to expand trend views.



Daily Data Analysis

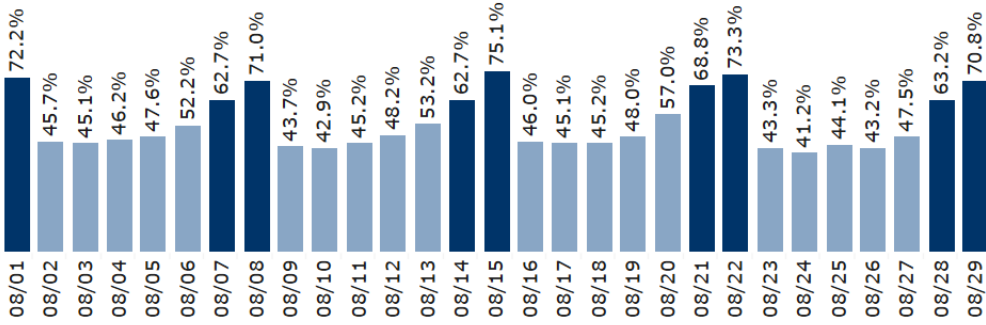
Sedona+ | 8/1/2026 to 8/29/2026 vs. Same-time-last-year

	Occupancy	ADR	RevPAR	Supply	Demand	Revenue
8/1/2026 to 8/29/2026	53.5%	\$254.85	\$136.26	68,411	36,577	\$9,321,819
8/2/2025 to 8/30/2025	59.0%	\$252.23	\$148.77	64,322	37,939	\$9,569,356
YOY % Change	-9.4%	+1.0%	-8.4%	+6.4%	-3.6%	-2.6%

Daily Occupancy Trend

8/1/2026 to 8/29/2026

WD WE

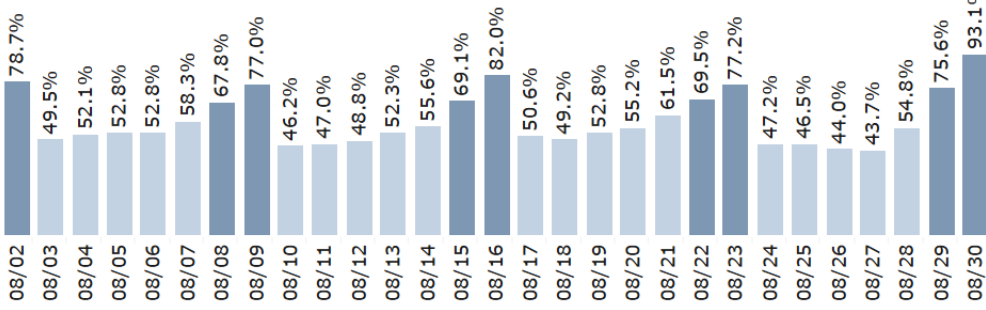


Date	Occupancy
08/01	72.2%
08/02	45.7%
08/03	45.1%
08/04	46.2%
08/05	47.6%
08/06	52.2%
08/07	62.7%
08/08	71.0%
08/09	43.7%
08/10	42.9%
08/11	45.2%
08/12	48.2%
08/13	53.2%
08/14	62.7%
08/15	75.1%
08/16	46.0%
08/17	45.1%
08/18	45.2%
08/19	48.0%
08/20	57.0%
08/21	68.8%
08/22	73.3%
08/23	43.3%
08/24	41.2%
08/25	44.1%
08/26	43.2%
08/27	47.5%
08/28	63.2%
08/29	70.8%

Comparison Daily Occupancy Trend

8/2/2025 to 8/30/2025

WD WE



Date	Occupancy
08/02	78.7%
08/03	49.5%
08/04	52.1%
08/05	52.8%
08/06	52.8%
08/07	58.3%
08/08	67.8%
08/09	77.0%
08/10	46.2%
08/11	47.0%
08/12	48.8%
08/13	52.3%
08/14	55.6%
08/15	69.1%
08/16	82.0%
08/17	50.6%
08/18	49.2%
08/19	52.8%
08/20	55.2%
08/21	61.5%
08/22	69.5%
08/23	77.2%
08/24	47.2%
08/25	46.5%
08/26	44.0%
08/27	43.7%
08/28	54.8%
08/29	75.6%
08/30	93.1%

Source: STR

Performance by Day-of Week

8/1/2026 to 8/29/2026

	Sun	Mon	Tue	Wed	Thu	Fri	Sat	WD	WE
Occ	44.7%	43.6%	45.2%	46.7%	52.5%	64.4%	72.5%	46.5%	68.9%
ADR	\$235	\$236	\$236	\$240	\$253	\$284	\$272	\$240	\$277
RevPAR	\$105	\$103	\$107	\$112	\$133	\$183	\$197	\$112	\$191
Supply	9.4K	9.4K	9.4K	9.4K	9.4K	9.4K	11.8K	47.2K	21.2K
Demand	4.2K	4.1K	4.3K	4.4K	5.0K	6.1K	8.5K	22.0K	14.6K
Revenue	\$989.9K	\$970.7K	\$1.0M	\$1.1M	\$1.3M	\$1.7M	\$2.3M	\$5.3M	\$4.0M

% Change by Day-of Week

vs. Same-time-last-year

	Sun	Mon	Tue	Wed	Thu	Fri	Sat	WD	WE
Occ	-7.6%	-10.5%	-8.8%	-8.3%	-8.8%	-8.7%	-11.2%	-8.8%	-10.2%
ADR	+6.8%	+3.8%	+2.1%	+9.7%	+8.3%	-4.5%	-5.0%	+6.2%	-4.8%
RevPAR	-1.4%	-7.0%	-7.0%	+0.6%	-1.2%	-12.8%	-15.7%	-3.2%	-14.5%
Supply	+6.4%	+6.4%	+6.4%	+6.4%	+6.4%	+6.4%	+6.4%	+6.4%	+6.4%
Demand	-1.7%	-4.8%	-3.0%	-2.5%	-3.0%	-2.9%	-5.5%	-3.0%	-4.4%
Revenue	+4.9%	-1.1%	-1.0%	+7.0%	+5.1%	-7.3%	-10.3%	+3.0%	-9.0%

Powered by SYMPHONY | TOURISM ECONOMICS

THANK YOU



SEDONA
stay inspired