



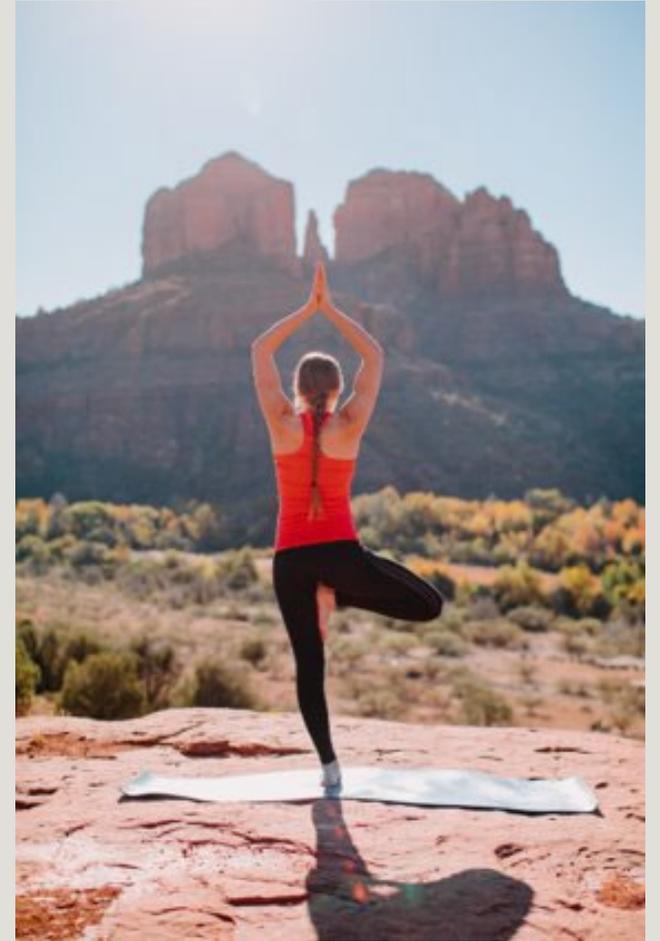
CITY OF SEDONA  
**TOURISM PROGRAM**

Lodging Council Meeting

March 10, 2026

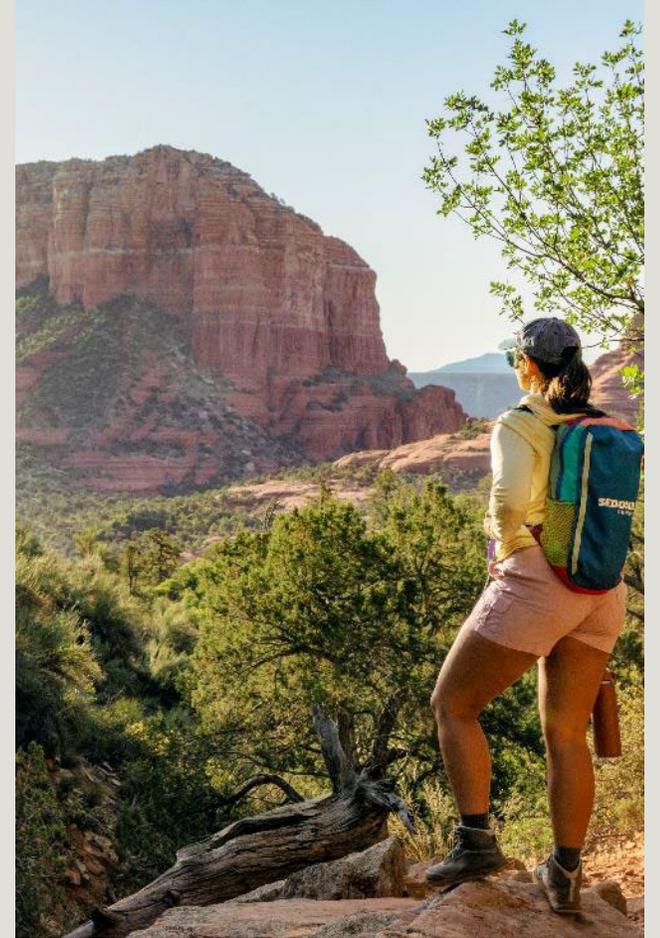
# Agenda Items

- Tourism Program Updates
- The Future of Tourism and the Sedona Experience Input Sessions
- State of Sedona Tourism Research



# FY26 Trade Show Calendar

- AAA Routz Conference – December 2025
- IMM NYC – January 2026
- IPEC – February 2026
- AOT Sales & Media Mission – February 2026
- Go West Summit – April 2026
- HelmsBriscoe Annual Conference – April 2026
- IPW – May 2026



# IPEC Recap

- I conducted 21 appointments with meeting planners over 2 days
- Hilton Resort at Bell Rock and Outbound Sedona also attended
- Several meeting planners visited Sedona for site assessments after the event
- We received our first IPEC RFP last week



**TOURISM PROGRAM**

# AOT Sales & Media Mission Recap

- The Arizona delegation included the Arizona Office of Tourism (AOT), Visit Phoenix, Discover Flagstaff, Antelope Canyon Tours, and Route 66
- I attended 9 different meetings and networking events with 60 different travel advisors and travel media in Paris, Lyon, and Brussels over the 3 days





# Sedona Pinkbike Field Test

- We partnered with Outside Inc. through the AOT Rural Marketing Co-Op to bring the Pinkbike Field Test back to Sedona this month
- This investment brings the Pinkbike editorial team to Sedona to test a collection of new bikes on our trails
- The output includes:
  - Editorial content on Pinkbike channels
  - Social media collaboration with Pinkbike
  - Video advertising on Outside Inc. channels
  - Display ads on Outside Inc. channels



## Video: The Story Behind 'Hardline', Sedona's Hardest Legal Trail

Mar 25, 2025  
by Mike Kastner

Follow  
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Back in 2020, when we were down in Sedona for a round of value bike testing, I first caught wind of a new tricky rock roll tucked up in a narrow canyon near Cathedral Rock. At the time, it was one-off move, a technical feature pioneered by Lars Romig, a Sedona local with a voracious appetite for steep rock rolls. As it turns out, Lars had been dreaming of incorporating a new section of trail into Sedona's existing network since 2017. Getting a new trail built and sanctioned on Forest Service land, especially a trail that's on the upper end of the difficulty scale, is no easy feat, but thanks to the work of several advocacy groups that vision became a reality earlier this year, and Hardline is now officially on the map.

It's definitely not a blue flow trail, which is why the addition of this trail is so great to see. The best trail networks have options for riders of all abilities, from beginner to expert, and I love seeing more difficult options rise up out of the sea of blue squares. Kudos to everyone involved in this project, and here's to keeping technical trails alive.



## TOURISM PROGRAM

# Destination Marketing Campaign Updates

- Our Winter 2025/2026 campaign was in flight from October 17 to February 15
  - We should be able to present results on this during the April Lodging Council meeting
- We will present our summer 2026 campaign strategy to City Council during the April 14 City Council meeting
- The proposed flight for the campaign is:
  - Flight markets | May 1 to August 15
  - Drive markets | May 15 to August 31



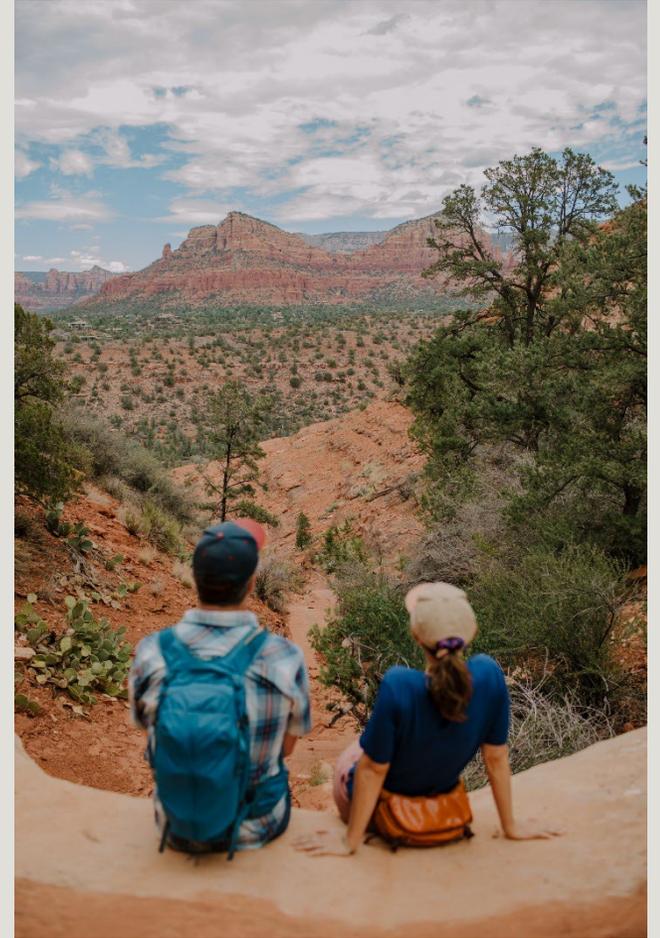
**TOURISM PROGRAM**

A scenic photograph of a desert landscape. In the foreground, two hikers are walking away from the camera on a dirt trail. The hiker on the left is wearing a blue shirt, shorts, and a backpack. The hiker on the right is wearing a blue shirt, shorts, and a hat. The trail is made of reddish-brown dirt and is surrounded by sparse desert vegetation, including cacti and small shrubs. In the background, there are large, layered red rock formations and a prominent mountain peak under a clear blue sky with a few wispy clouds. The overall scene is bright and sunny.

**Upcoming Community Input Sessions**

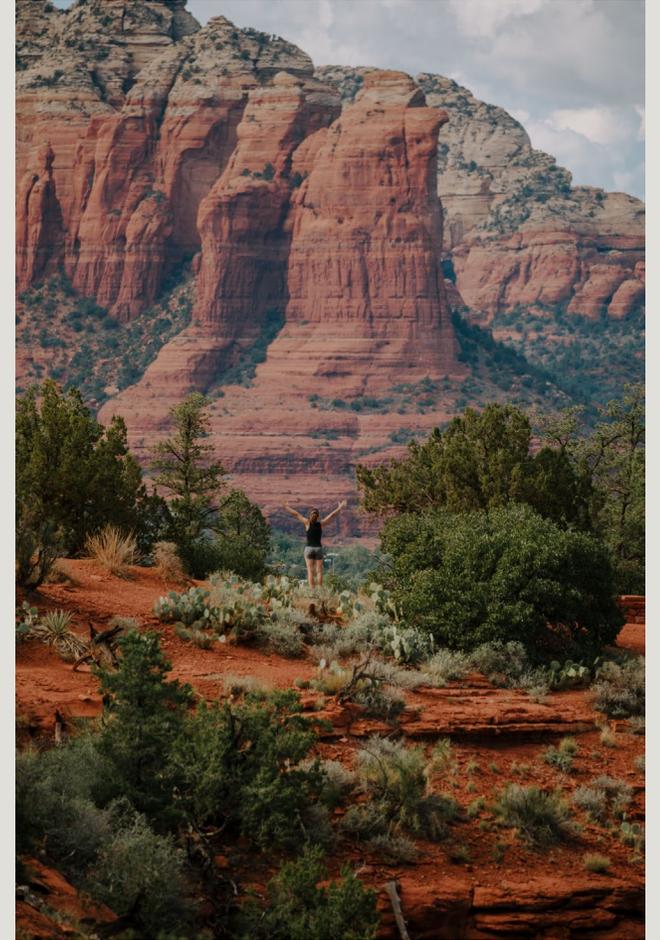
# Context

- City Council has directed the Tourism Program to host input sessions with residents and businesses this spring related to the future of tourism and the Sedona experience
- This request is timely because we are planning to release an updated Sedona Tourism Plan this summer



# Purpose

- Purpose: Ask residents and businesses where they want to see the future of tourism in Sedona through the lens of:
  - How do we improve the quality of the experience in Sedona?
  - How do we make it a win-win for residents first, and then visitors?
- Outcome: Public input that can be shared with City Council to help inform future tourism-related decisions at the City.



# Structure

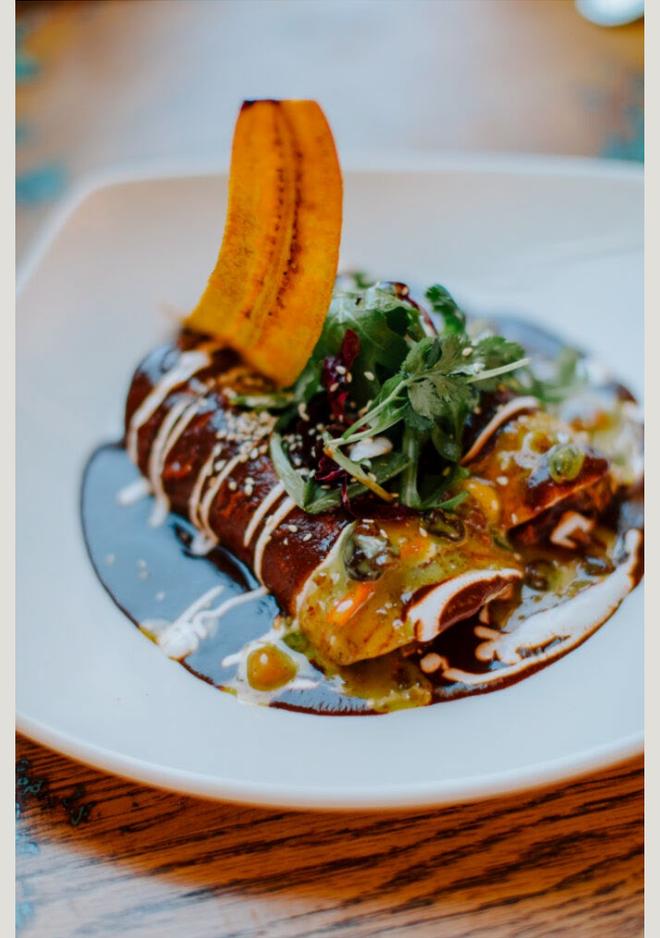
- Two sessions have been scheduled at The HUB at Posse Grounds
  - Tuesday, April 21 from 6 p.m. to 8 p.m.
  - Wednesday, May 13 from 10 a.m. to noon
- Attendees will be seated at round table of 5-6 people
- Proposed agenda
  - Welcome, Opening Remarks, and Group Introductions
  - State of Sedona Tourism Update
  - Table Group Discussion #1: Defining the Sedona Experience
  - Table Group Discussion #2: Action Planning Enhancements
  - Closing Comments



**TOURISM PROGRAM**

# Next Steps

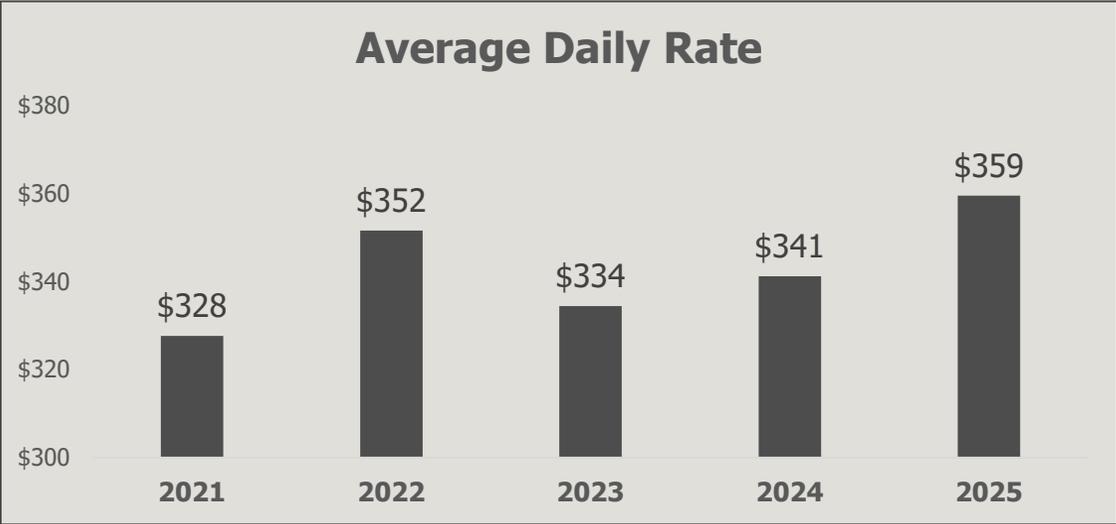
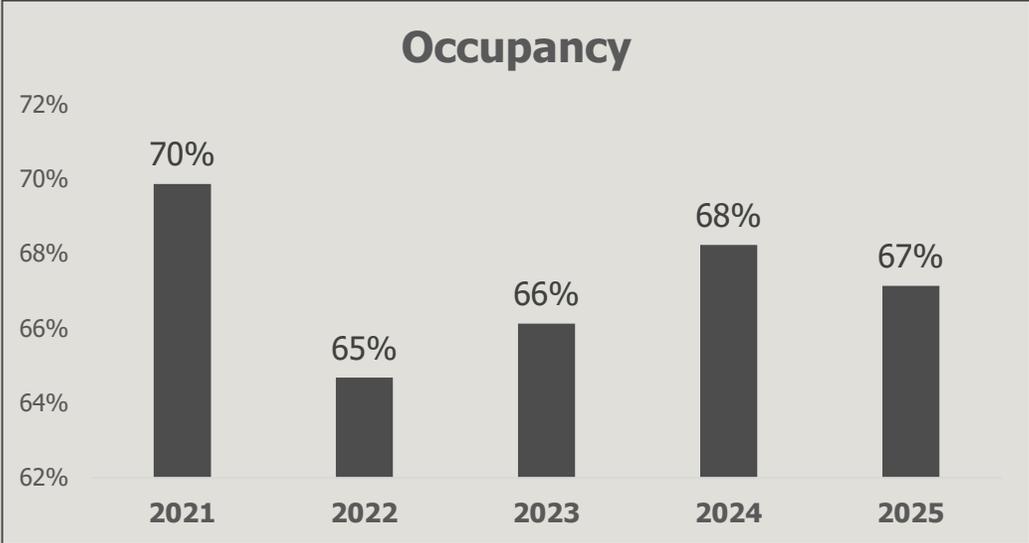
- We will publish the public announcement on the City website later this week
- We'll further promote this via e-notify, Press Releases, and social media
- We'll be extending specific invitations to local industry leaders
- Please help us to spread the word to have strong representation at these events



A man in a blue button-down shirt is smiling and handing a green ice cream cone to a customer. The customer's hand is wearing a clear plastic glove. The background shows a display of many more ice cream cones on a shelf. The scene is set in what appears to be an ice cream shop or a food stand.

# State of Sedona Tourism Research

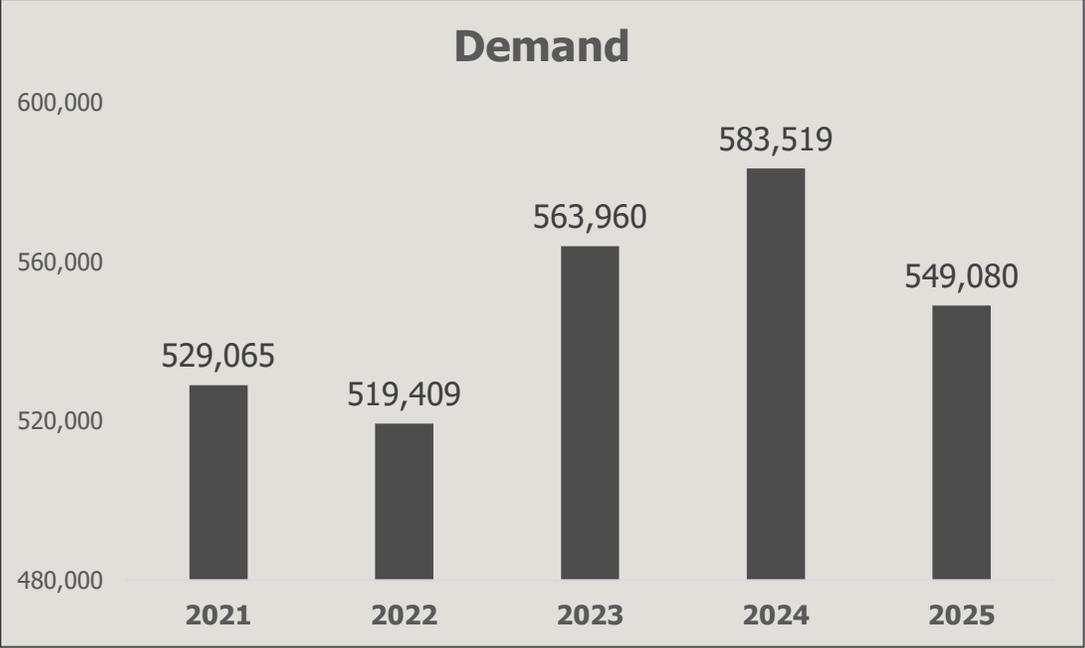
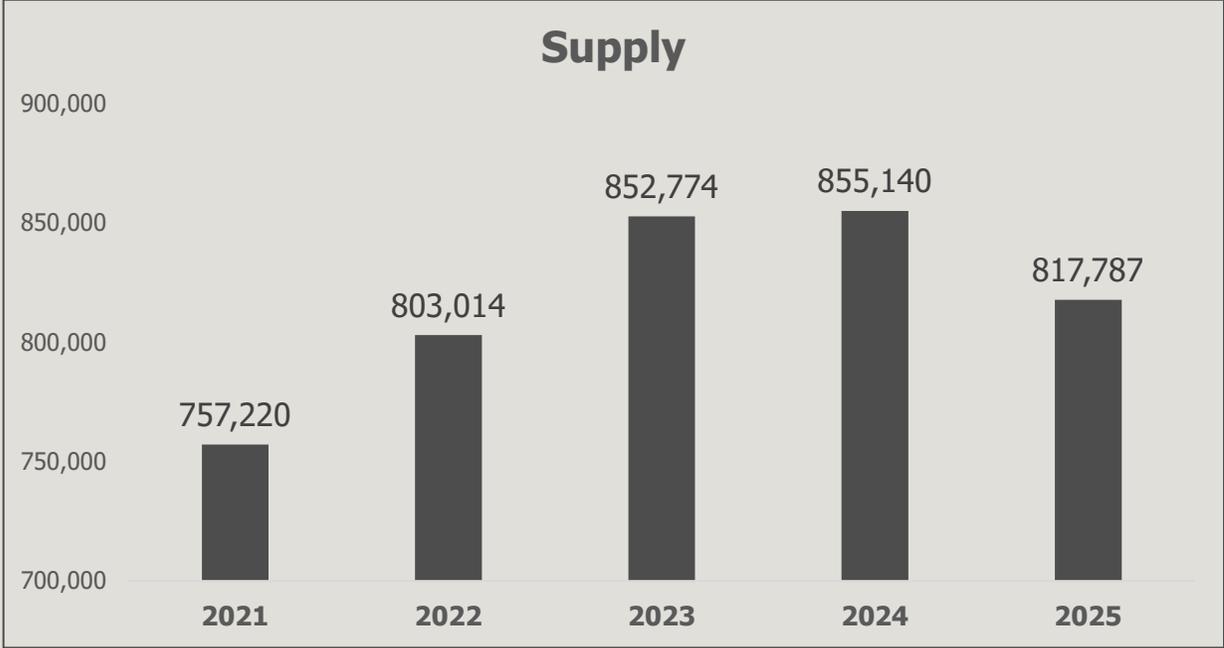
# Sedona Hotel Performance 2021-2025



## TOURISM PROGRAM

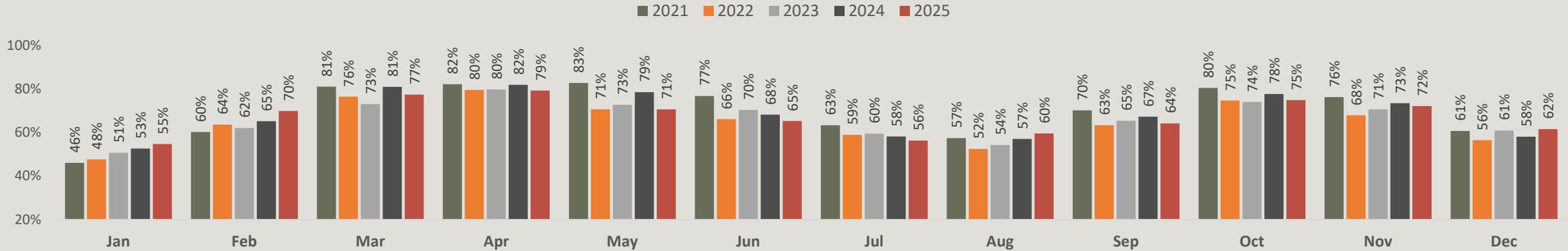
Source: Smith Travel Research

# Sedona Hotel Performance 2021-2025

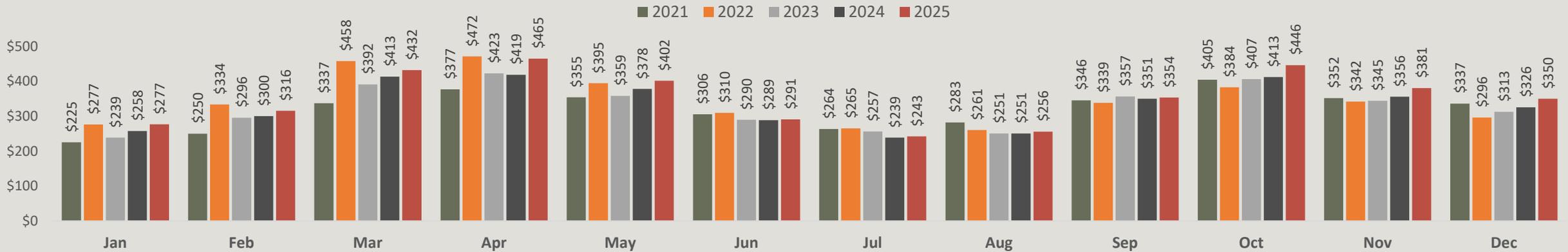


# Sedona Hotel Performance 2021-2025

## Occupancy



## Average Daily Rate



**TOURISM PROGRAM**

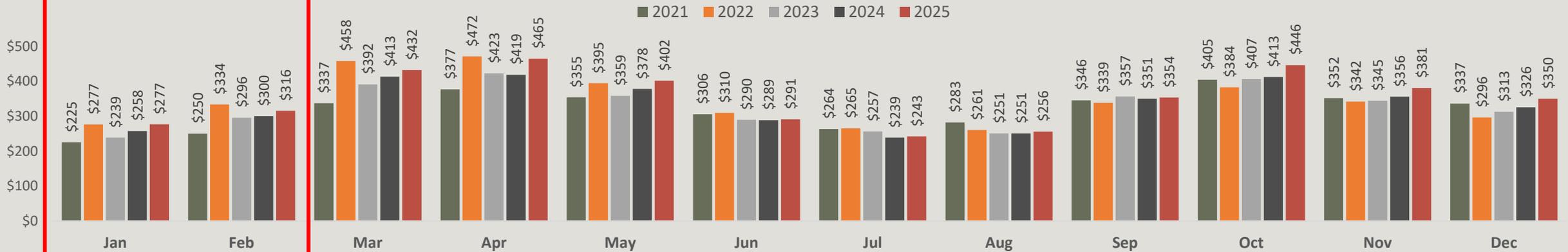
Source: Smith Travel Research

# Sedona Hotel Performance 2021-2025

## Occupancy



## Average Daily Rate



# TOURISM PROGRAM

Source: Smith Travel Research

# City Sales & Bed Tax - 2025

Sales Tax	2024	2025	%
Jan	\$2,378,359	\$2,517,384	6%
Feb	\$2,540,438	\$2,701,583	6%
Mar	\$3,710,005	\$3,475,086	-6%
Apr	\$3,297,969	\$3,542,595	7%
May	\$3,146,692	\$3,170,594	1%
Jun	\$2,835,443	\$2,489,089	-12%
Jul	\$2,253,056	\$2,542,036	13%
Aug	\$2,292,851	\$2,252,752	-2%
Sep	\$2,836,024	\$3,041,749	7%
Oct	\$3,261,824	\$3,192,417	-2%
Nov	\$3,011,045	\$3,132,438	4%
<b>TOTAL</b>	<b>\$31,563,706</b>	<b>\$32,057,723</b>	<b>2%</b>

Bed Tax	2024	2025	%
Jan	\$676,045	\$760,087	12%
Feb	\$717,017	\$742,074	3%
Mar	\$1,198,616	\$1,082,571	-10%
Apr	\$916,570	\$1,022,271	12%
May	\$944,627	\$853,657	-10%
Jun	\$729,598	\$506,217	-31%
Jul	\$488,527	\$720,904	48%
Aug	\$570,946	\$521,044	-9%
Sep	\$781,516	\$702,045	-10%
Oct	\$995,346	\$986,112	-1%
Nov	\$763,171	\$889,299	17%
<b>TOTAL</b>	<b>\$8,781,980</b>	<b>\$8,786,280</b>	<b>0%</b>



# Hotels vs Short-Term Rentals

We have calculated the proportion of the City Bed Tax so far in 2025 that was paid for by the hotels, timeshares, and online travel agents compared to the short-term rental listing platforms and the short-term rentals

YTD 2025 Bed Tax Remittance												
	January	February	March	April	May	June	July	August	Sep	Oct	Nov	TOTAL
Hotel & Timeshare	\$336,829	\$403,268	\$659,605	\$680,972	\$575,560	\$258,075	\$496,353	\$299,015	\$431,170	\$606,018	\$552,729	\$5,299,595
Short-Term Rental	\$423,258	\$338,806	\$422,966	\$341,298	\$278,097	\$248,142	\$224,551	\$222,028	\$270,875	\$380,094	\$336,569	\$3,486,685
<b>TOTAL</b>	<b>\$760,087</b>	<b>\$742,074</b>	<b>\$1,082,571</b>	<b>\$1,022,271</b>	<b>\$853,657</b>	<b>\$506,217</b>	<b>\$720,904</b>	<b>\$521,044</b>	<b>\$702,045</b>	<b>\$986,112</b>	<b>\$889,299</b>	<b>\$8,786,280</b>
<i>Hotel &amp; Timeshare %</i>	44%	54%	61%	67%	67%	51%	69%	57%	61%	61%	62%	60%
<i>Short-Term Rental %</i>	56%	46%	39%	33%	33%	49%	31%	43%	39%	39%	38%	40%





# Monthly Summary Report

## January 2026

# Monthly Historical Lodging

January 2026 | Sedona



## Hotel Performance

Source: STR (Sedona+)

	Occupancy	ADR	RevPAR	Revenue
Jan 2026	57.1%	\$294.76	\$168.38	\$11.5M
YOY % Change	+4.4% YOY	+6.3% YOY	+11.0% YOY	+7.7% YOY
Calendar Year-to-Date	57.1%	\$294.76	\$168.38	\$11.5M
YTD YOY % Change	+4.4% YOY	+6.3% YOY	+11.0% YOY	+7.7% YOY

## Short Term Vacation Rental Performance - Scraped AirBnB Data

Source: KeyData (Vacation Area - Residential Zone)

	Occupancy	ADR	RevPAR	Revenue
Jan 2026	43.4%	\$441.69	\$191.58	\$7.2M
YOY % Change	+3.5% YOY	+3.4% YOY	+7.0% YOY	+9.1% YOY
Calendar Year-to-Date	43.4%	\$441.69	\$191.58	\$7.2M
YTD YOY % Change	+3.5% YOY	+3.4% YOY	+7.0% YOY	+9.1% YOY

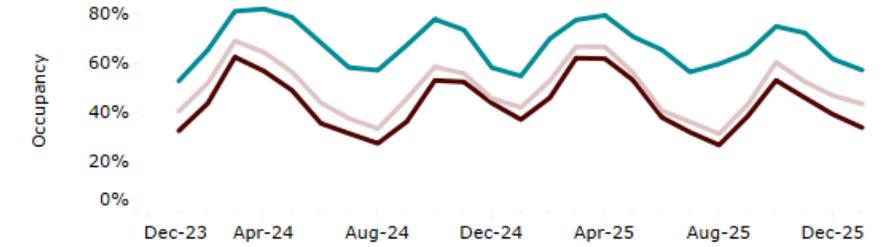
## Short Term Vacation Rental Performance - Scraped VRBO Data

Source: KeyData (Vacation Area - Residential Zone)

	Occupancy	ADR	RevPAR	Revenue
Jan 2026	33.8%	\$489.63	\$165.40	\$3.3M
YOY % Change	-8.8% YOY	-0.1% YOY	-8.9% YOY	-16.2% YOY
Calendar Year-to-Date	33.8%	\$489.63	\$165.40	\$3.3M
YTD YOY % Change	-8.8% YOY	-0.1% YOY	-8.9% YOY	-16.2% YOY

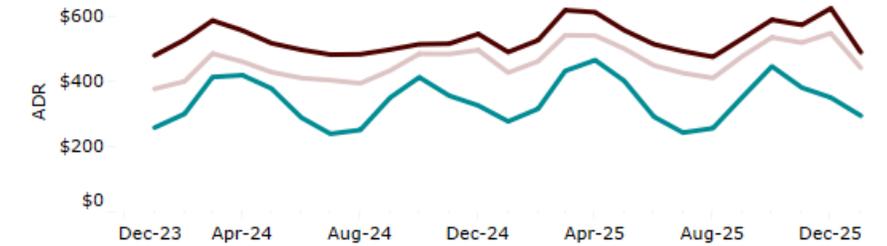
## Occupancy by Month

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



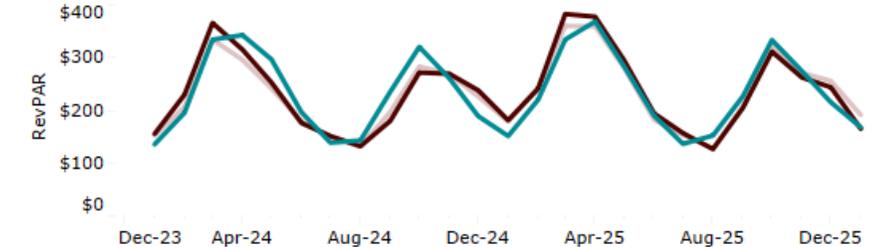
## ADR by Month

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





## Sedona+ Hotel Performance

Calendar Year-to-Date Performance  
compared to last year

Occupancy	ADR	RevPAR	Supply	Demand	Revenue
<b>57.1%</b>	<b>\$295</b>	<b>\$168</b>	<b>68.4K</b>	<b>39.1K</b>	<b>\$11.5M</b>
+4.4%	+6.3%	+11.0%	-2.9%	+1.3%	+7.7%

### Monthly Performance

	OCC	% CHG	ADR	% CHG	RevPAR	% CHG
Nov	72.2%	-1.7%	\$381	+7.0%	\$275	+5.1%
Dec	61.5%	+5.9%	\$350	+7.5%	\$216	+13.9%
Jan	57.1%	+4.4%	\$295	+6.3%	\$168	+11.0%

## Village of Oak Creek+ Hotel Performance

Calendar Year-to-Date Performance  
compared to last year

Occupancy	ADR	RevPAR	Supply	Demand	Revenue
<b>50.4%</b>	<b>\$171</b>	<b>\$86</b>	<b>24.2K</b>	<b>12.2K</b>	<b>\$2.1M</b>
-1.8%	+4.5%	+2.6%		-1.8%	+2.6%

### Monthly Performance

	OCC	% CHG	ADR	% CHG	RevPAR	% CHG
Nov	64.5%	-3.6%	\$223	+8.4%	\$144	+4.5%
Dec	57.6%	+5.8%	\$212	+9.2%	\$122	+15.5%
Jan	50.4%	-1.8%	\$171	+4.5%	\$86	+2.6%

# Hotel 4 Month Outlook

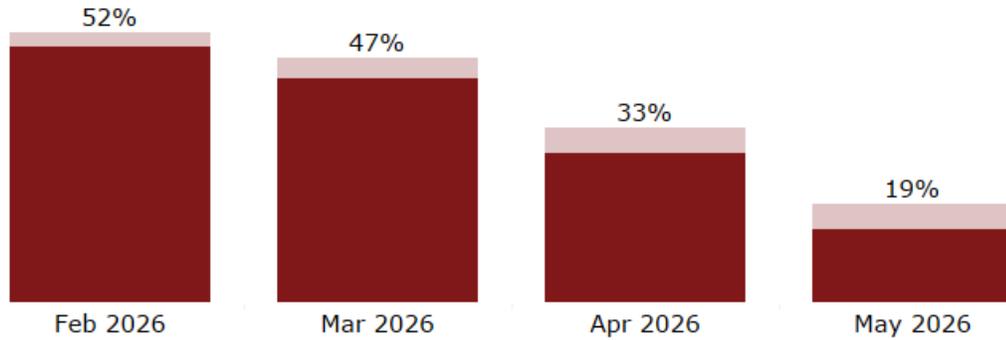
Data for zip code 86336



## Occupancy as of 2/25/2026

### Current Occupancy

■ Group Committed ■ Transient



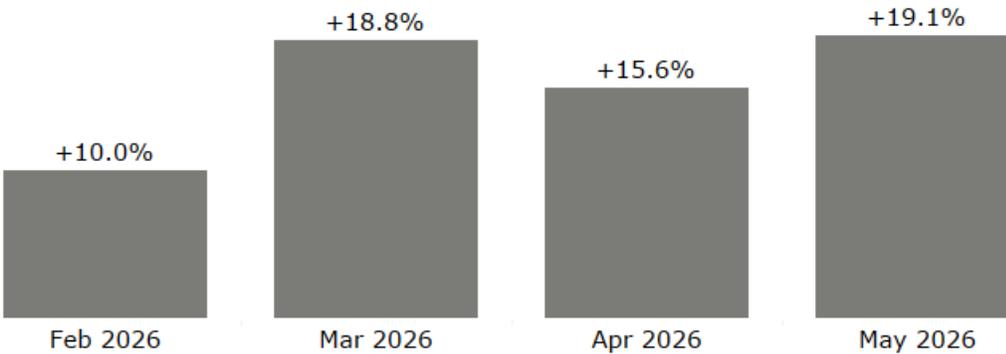
## Bookings by Segment

	Feb 2026	Mar 2026	Apr 2026	May 2026
Transient	16.8K	16.2K	10.4K	5.3K
Group Committed	971	1.6K	1.7K	1.8K
Total with Group Committed	17.7K	17.7K	12.2K	7.1K

**Rooms Booked**

### Booking Pace

Total Rooms Committed vs. Same-Time-Last-Year



**YOY % Change**

	Feb 2026	Mar 2026	Apr 2026	May 2026
Transient	+10.5%	+17.5%	+19.9%	+23.6%
Group Committed	+1.5%	+33.2%	-4.9%	+7.8%
Total with Group Committed	+10.0%	+18.8%	+15.6%	+19.1%

# Short Term Rental Review

January 2026



## Residential Zone (Airbnb) Performance

Calendar Year-to-Date Performance  
compared to last year

Occupancy  
**43.4%**  
+3.5%

ADR  
**\$442**  
+3.4%

RevPAR  
**\$192**  
+7.0%

### Monthly Performance

	OCC	% CHG	ADR	% CHG	RevPAR	% CHG
Nov	52.3%	-6.2%	\$519	+7.2%	\$272	+0.5%
Dec	46.7%	+2.4%	\$548	+10.5%	\$256	+13.2%
Jan	43.4%	+3.5%	\$442	+3.4%	\$192	+7.0%

## Residential Zone (VRBO) Performance

Calendar Year-to-Date Performance  
compared to last year

Occupancy  
**33.8%**  
-8.8%

ADR  
**\$490**  
-0.1%

RevPAR  
**\$165**  
-8.9%

### Monthly Performance

	OCC	% CHG	ADR	% CHG	RevPAR	% CHG
Nov	45.8%	-12.4%	\$574	+11.2%	\$263	-2.6%
Dec	39.1%	-10.5%	\$625	+14.5%	\$244	+2.4%
Jan	33.8%	-8.8%	\$490	-0.1%	\$165	-8.9%

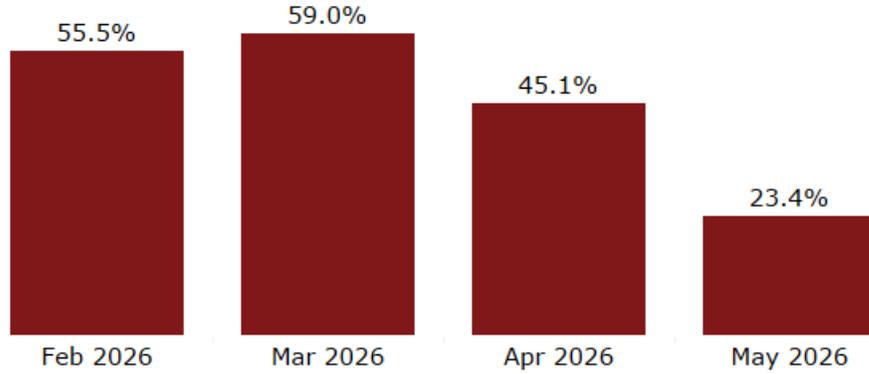


# Short Term Lodging 4 Month Outlook



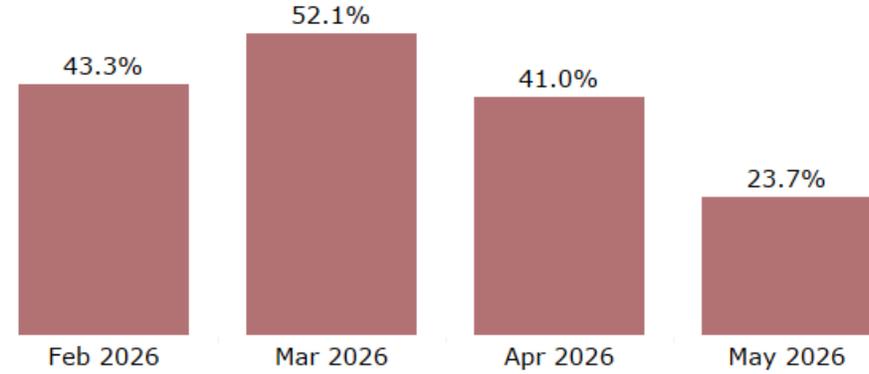
## OTA AirBNB - Residential Zone

### Occupancy Outlook

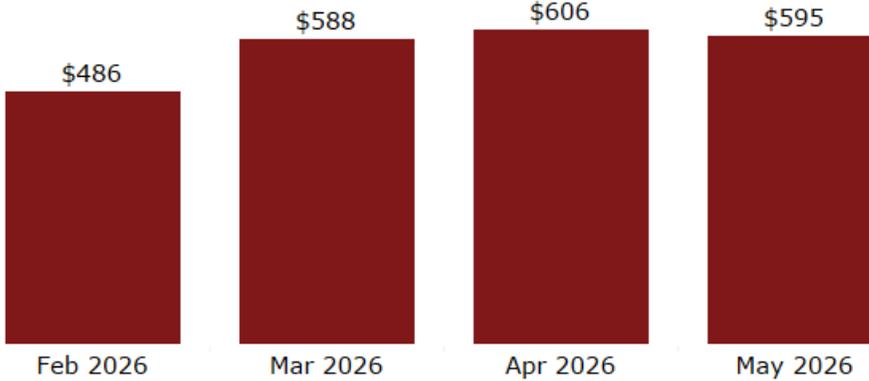


## OTA VRBO - Residential Zone

### Occupancy Outlook



### ADR Outlook



### ADR Outlook



**THANK YOU**

