



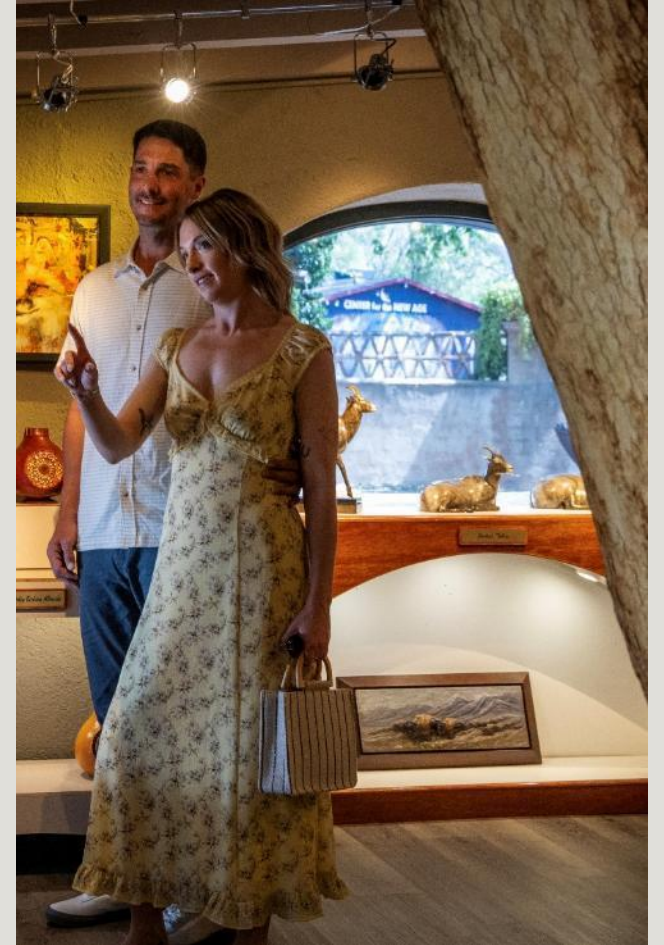
CITY OF SEDONA

TOURISM OFFICE

Lodging Council Meeting
October 13, 2026 Meeting

Agenda

- Destination marketing campaign update
- FY27 trade show calendar
- Sedona lodging performance review
- Monthly tourism research



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Destination Marketing Campaign Updates

Campaign Launch Update

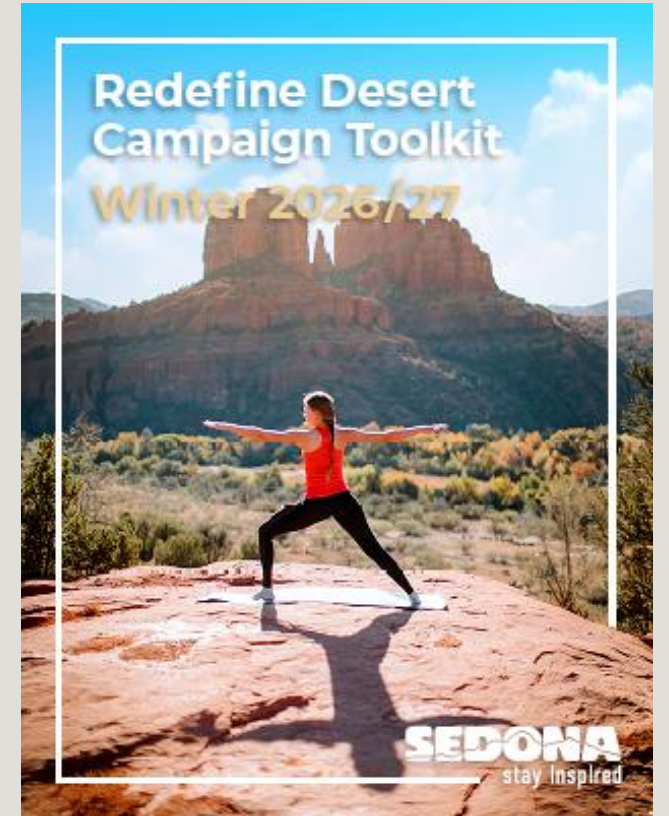
- We launched our Winter 2026/2027 campaign and our year-round high-net-worth audience campaign:
 - Flight markets: October 1, 2026 to February 1, 2027
 - Drive markets: October 15, 2026 to February 15, 2027
 - High-net-worth audience will remain in flight
- Drive markets
 - Phoenix
 - Tucson
 - Los Angeles
 - San Diego
 - Las Vegas
- Flight Markets
 - Denver
 - Seattle
 - Chicago
 - San Francisco
 - Minneapolis
 - New York



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Partnership Opportunities

- Please send us your updated deals
- Utilize our social media toolkit to amplify the campaign



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FY27 Trade Show Schedule

FY27 Trade Show Schedule

- MPI Hosted Buyer Event: December 1
- IITA Summit: January 31 – February 3
- AOT France/UK/Ireland Mission: February 15-19
- Go West Summit: February 28 – March 3
- Travel Classics West: April 1
- Smart Meetings: Small & Boutique Meetings: April 25-27
- IPW: May 2-6



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2027 Calendar Year Planning



Planning For 2027

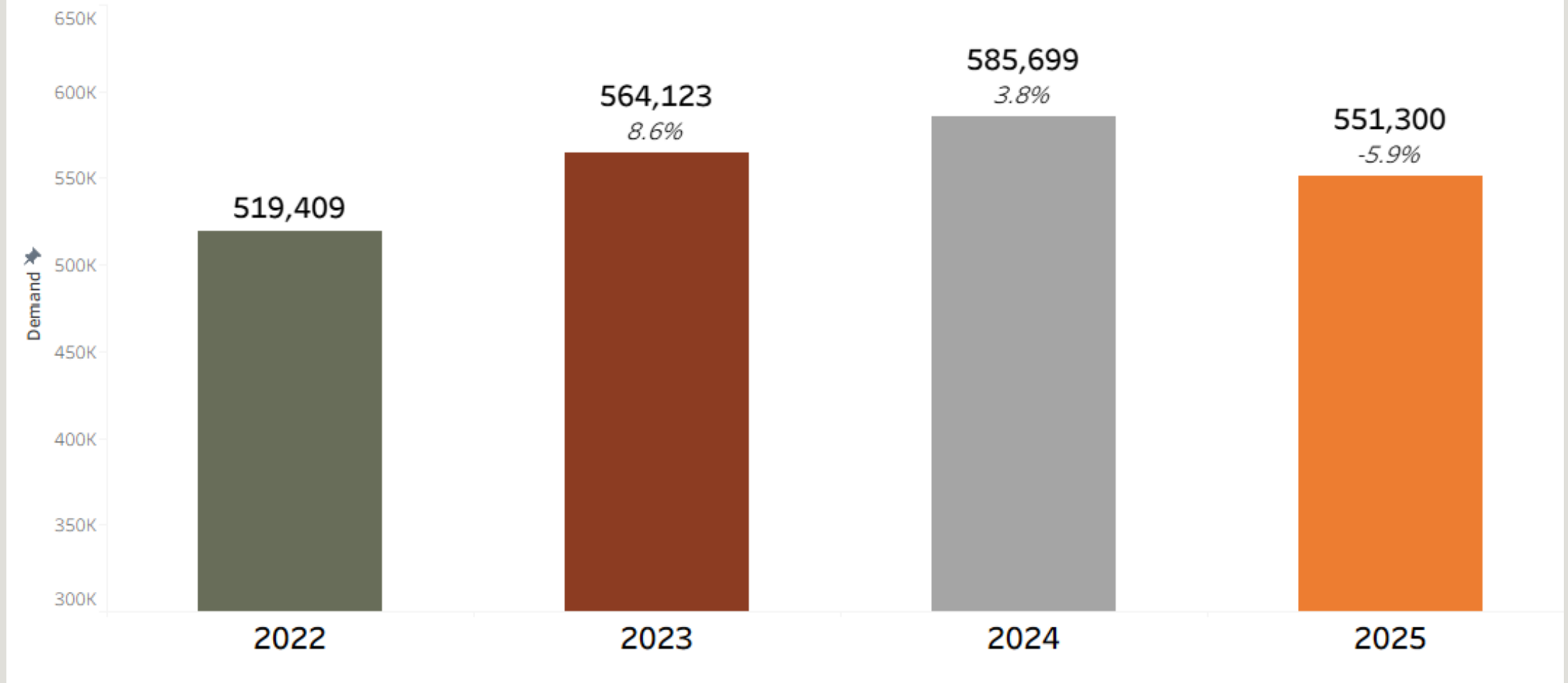
- Submit your 2027 rates to the B2B inventories
- A few hotels reached out for an industry forecast
- Although this isn't something we provide, our team pulled together some information for everyone



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Annual Hotel Room Nights Sold

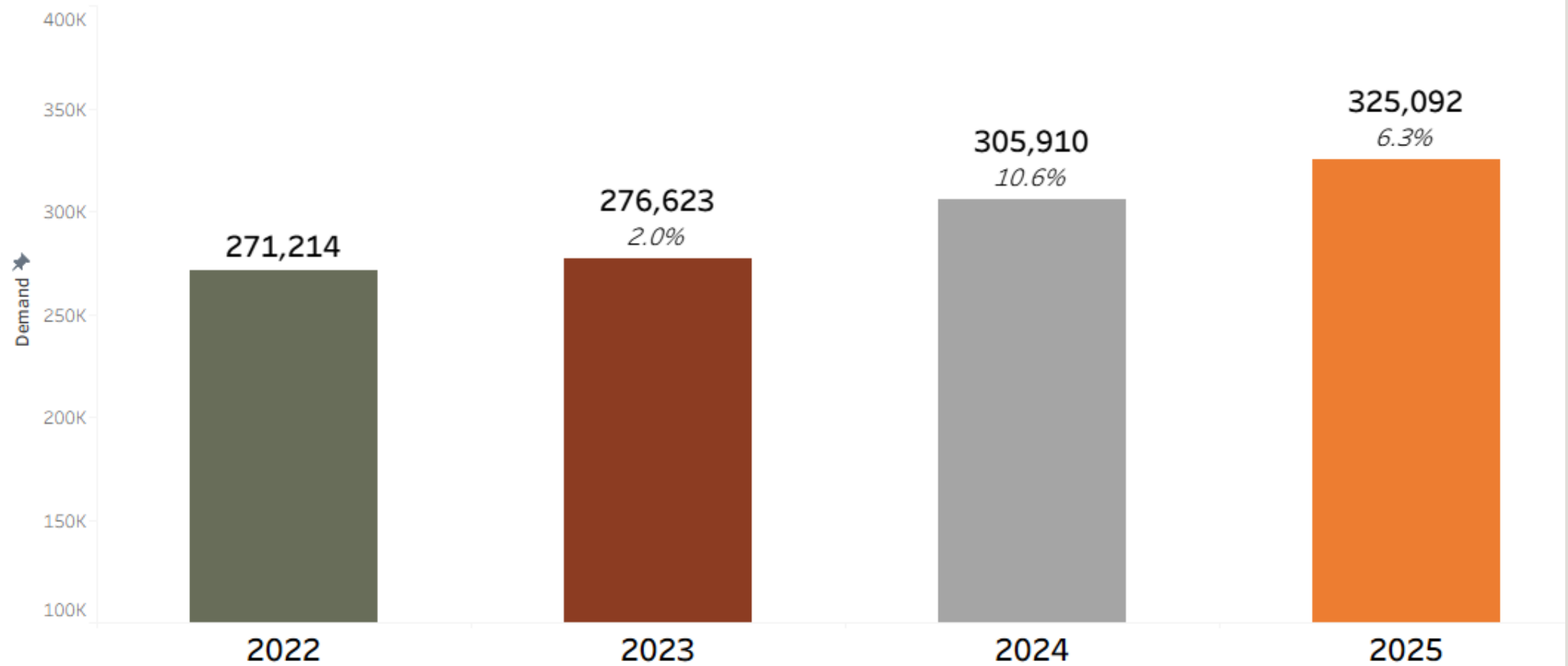
Source: STR, Inc.



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Annual Short-Term Rental Demand

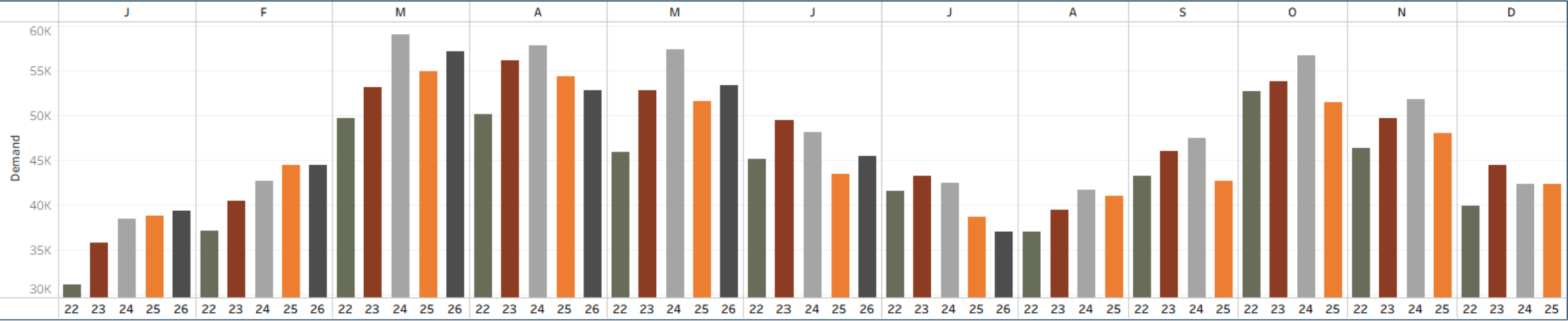
Source: KeyData, AirBnb & Vrbo listings, 'Residential Zone' only



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Sedona Hotel Demand by Month

Source: STR, Inc.



Hotel Room Nights Sold												
	J	F	M	A	M	J	J	A	S	O	N	D
2022	31,028	37,108	49,699	50,092	45,922	45,116	41,525	36,968	43,207	52,626	46,305	39,813
2023	35,742	40,380	53,074	56,067	52,834	49,471	43,242	39,431	45,976	53,780	49,693	44,433
2024	38,421	42,693	59,057	57,814	57,297	48,122	42,395	41,608	47,477	56,691	51,789	42,335
2025	38,767	44,395	54,848	54,349	51,536	43,381	38,674	40,932	42,682	51,415	48,005	42,316
2026	39,313	44,376	57,137	52,755	53,363	45,377	36,949					

YOY % Change												
2023	15.2%	8.8%	6.8%	11.9%	15.1%	9.7%	4.1%	6.7%	6.4%	2.2%	7.3%	11.6%
2024	7.5%	5.7%	11.3%	3.1%	8.4%	-2.7%	-2.0%	5.5%	3.3%	5.4%	4.2%	-4.7%
2025	0.9%	4.0%	-7.1%	-6.0%	-10.1%	-9.9%	-8.8%	-1.6%	-10.1%	-9.3%	-7.3%	0.0%
2026	1.4%	0.0%	4.2%	-2.9%	3.5%	4.6%	-4.5%					

% Change from 2024												
2025	0.9%	4.0%	-7.1%	-6.0%	-10.1%	-9.9%	-8.8%	-1.6%	-10.1%	-9.3%	-7.3%	0.0%
2026	2.3%	3.9%	-3.3%	-8.8%	-6.9%	-5.7%	-12.8%					



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Domestic Visa Spending by Origin Market

Total Domestic Visitor Spending

Source: Visa, Visitors only, Consumer cards only



	2025												2026							
	J	F	M	A	M	J	J	A	S	O	N	D	J	F	M	A	M	J	J	
Spend Amount	\$15.4M	\$18.4M	\$26.6M	\$26.4M	\$23.2M	\$18.0M	\$16.0M	\$15.4M	\$18.1M	\$23.8M	\$21.1M	\$18.2M	\$16.0M	\$19.2M	\$28.5M	\$27.5M	\$24.8M	\$18.1M	\$13.8M	
Card Count	101.8K	113.3K	157.3K	149.8K	144.9K	122.4K	115.4K	107.7K	110.1K	135.8K	127.1K	113.9K	106.5K	115.8K	166.4K	149.4K	147.6K	113.2K	93.5K	
Avg Ticket	\$73	\$73	\$74	\$75	\$73	\$69	\$66	\$69	\$77	\$80	\$75	\$73	\$73	\$75	\$74	\$77	\$76	\$72	\$68	
Transaction Count	243.7K	281.1K	394.0K	383.1K	357.5K	300.7K	278.9K	259.2K	275.9K	338.7K	308.6K	269.5K	247.7K	281.9K	413.6K	383.4K	366.6K	287.0K	234.6K	

YOY Spend %	14.1%	12.4%	9.0%	11.3%	4.1%	-0.1%	1.2%	6.5%	-0.5%	3.3%	0.4%	4.6%	4.0%	4.3%	7.1%	4.3%	6.8%	0.4%	-13.6%
YOY Card Count %	3.4%	5.3%	3.2%	3.8%	0.2%	-1.6%	-2.5%	2.4%	-6.7%	-1.1%	-1.7%	-0.1%	4.5%	2.2%	5.8%	-0.3%	1.9%	-7.5%	-19.0%
YOY Avg Ticket %	2.9%	2.2%	4.6%	4.3%	2.2%	3.1%	4.8%	1.3%	7.1%	6.7%	0.8%	1.5%	-0.3%	3.6%	0.5%	3.1%	3.8%	4.6%	3.6%
YOY Transaction Count %	7.6%	8.8%	4.5%	5.1%	-0.1%	-2.2%	-3.9%	0.4%	-6.3%	-3.4%	-2.8%	-0.4%	1.6%	0.3%	5.0%	0.1%	2.5%	-4.6%	-15.9%

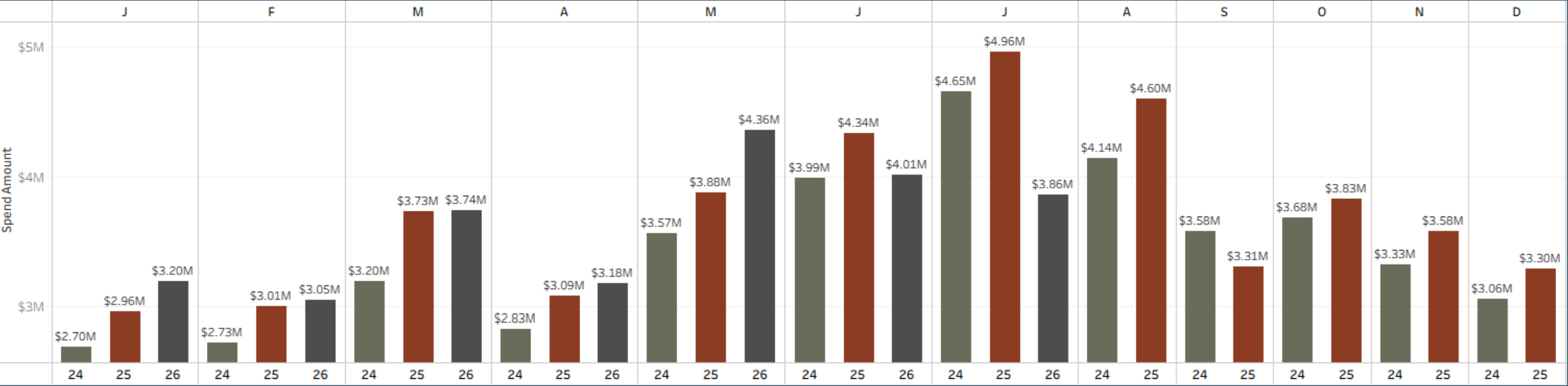


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Domestic Visa Spending by Origin Market

Phoenix-Mesa-Chandler, AZ

Source: Visa, Visitors only, Consumer cards only



	2025												2026						
	J	F	M	A	M	J	J	A	S	O	N	D	J	F	M	A	M	J	J
Spend Amount	\$2.96M	\$3.01M	\$3.73M	\$3.09M	\$3.88M	\$4.34M	\$4.96M	\$4.60M	\$3.31M	\$3.83M	\$3.58M	\$3.30M	\$3.20M	\$3.05M	\$3.74M	\$3.18M	\$4.36M	\$4.01M	\$3.86M
Card Count	28.1K	27.1K	35.5K	29.3K	36.1K	39.0K	43.6K	40.2K	30.7K	33.6K	31.8K	27.9K	30.4K	27.7K	34.5K	29.1K	38.2K	34.2K	31.9K
Average Ticket	\$162	\$163	\$166	\$165	\$162	\$164	\$158	\$161	\$160	\$172	\$165	\$170	\$159	\$172	\$169	\$168	\$169	\$166	\$158
Transaction Count	54.1K	52.9K	67.9K	54.5K	70.2K	80.1K	92.7K	82.9K	60.5K	64.5K	60.6K	53.6K	57.7K	52.4K	65.3K	55.0K	75.5K	72.4K	69.7K

YOY Spend %	9.7%	9.9%	16.6%	8.9%	8.7%	8.7%	6.5%	11.1%	-7.6%	4.1%	7.7%	7.9%	8.1%	1.4%	0.3%	3.1%	12.4%	-7.5%	-22.1%
YOY Card Count %	-3.7%	3.0%	17.4%	7.4%	6.2%	3.8%	1.4%	7.2%	-10.7%	-1.8%	3.9%	-1.2%	8.5%	2.2%	-2.9%	-0.6%	5.9%	-12.5%	-26.8%
YOY Avg Ticket %	-7.9%	1.3%	-11.1%	3.1%	-11.7%	-3.9%	6.8%	3.3%	-20.1%	-8.4%	-6.8%	0.7%	-1.6%	5.1%	1.5%	2.3%	4.3%	0.9%	0.3%
YOY Transaction Count %	0.3%	5.3%	15.5%	3.8%	6.1%	3.3%	0.3%	4.4%	-11.8%	-3.0%	2.2%	-0.9%	6.5%	-1.0%	-3.8%	0.9%	7.6%	-9.6%	-24.8%

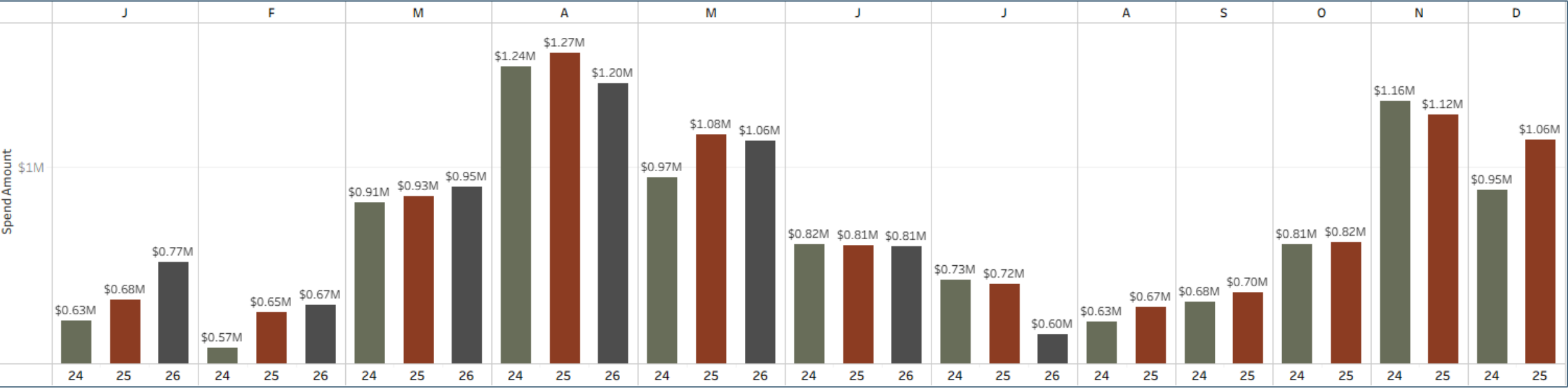


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Domestic Visa Spending by Origin Market

Los Angeles-Long Beach-Anaheim, CA

Source: Visa, Visitors only, Consumer cards only



	2025												2026							
	J	F	M	A	M	J	J	A	S	O	N	D	J	F	M	A	M	J	J	
Spend Amount	\$0.68M	\$0.65M	\$0.93M	\$1.27M	\$1.08M	\$0.81M	\$0.72M	\$0.67M	\$0.70M	\$0.82M	\$1.12M	\$1.06M	\$0.77M	\$0.67M	\$0.95M	\$1.20M	\$1.06M	\$0.81M	\$0.60M	
Card Count	4.1K	3.8K	5.0K	6.8K	6.1K	4.6K	4.3K	4.0K	3.7K	4.5K	6.3K	6.0K	4.4K	3.7K	5.3K	6.0K	5.7K	4.5K	3.6K	
Average Ticket	\$207	\$198	\$219	\$225	\$211	\$205	\$200	\$199	\$295	\$183	\$181	\$216	\$230	\$213	\$203	\$214	\$205	\$170	\$197	
Transaction Count	10.3K	9.5K	12.6K	17.6K	15.0K	12.1K	10.9K	9.9K	9.3K	11.2K	15.3K	14.3K	10.1K	9.2K	12.9K	15.5K	14.4K	11.4K	8.9K	
YOY Spend %	7.8%	15.0%	1.6%	2.5%	10.6%	-0.4%	-1.3%	5.8%	3.2%	0.6%	-2.7%	12.6%	13.3%	2.8%	2.6%	-5.6%	-1.5%	-0.3%	-16.8%	
YOY Card Count %	7.7%	11.5%	-8.9%	-0.5%	0.9%	-8.9%	-10.3%	3.8%	-8.2%	-1.2%	-5.1%	-2.7%	7.9%	-0.7%	5.9%	-11.6%	-6.4%	-3.6%	-16.7%	
YOY Avg Ticket %	2.9%	-0.1%	-5.7%	1.0%	5.8%	10.4%	21.0%	9.3%	51.0%	-22.6%	-14.3%	5.1%	10.8%	7.7%	-7.2%	-5.0%	-2.9%	-16.7%	-1.5%	
YOY Transaction Count %	12.7%	13.1%	-6.7%	3.8%	0.8%	-5.3%	-9.8%	0.1%	-8.3%	-2.5%	-6.1%	-1.2%	-1.2%	-3.2%	2.8%	-11.8%	-4.4%	-5.6%	-18.2%	

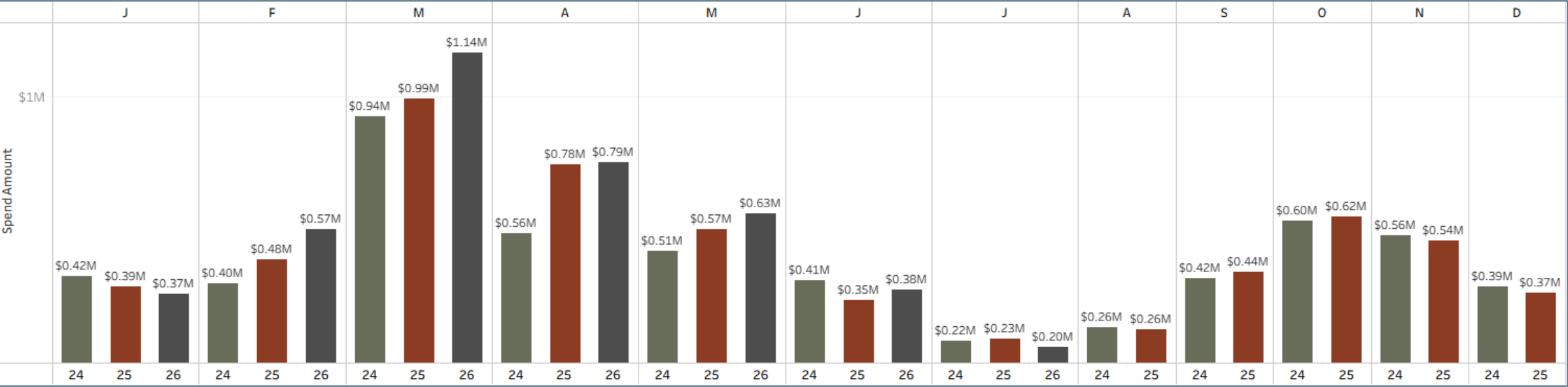


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Domestic Visa Spending by Origin Market

Chicago-Naperville-Elgin, IL-IN-WI

Source: Visa, Visitors only, Consumer cards only



	2025												2026							
	J	F	M	A	M	J	J	A	S	O	N	D	J	F	M	A	M	J	J	
Spend Amount	\$0.39M	\$0.48M	\$0.99M	\$0.78M	\$0.57M	\$0.35M	\$0.23M	\$0.26M	\$0.44M	\$0.62M	\$0.54M	\$0.37M	\$0.37M	\$0.57M	\$1.14M	\$0.79M	\$0.63M	\$0.38M	\$0.20M	
Card Count	2.1K	2.5K	4.6K	3.5K	2.7K	1.8K	1.2K	1.4K	1.9K	2.7K	2.4K	2.1K	2.0K	2.8K	5.3K	3.6K	2.8K	1.9K	1.1K	
Average Ticket	\$323	\$368	\$365	\$364	\$333	\$377	\$327	\$370	\$338	\$358	\$318	\$314	\$327	\$357	\$327	\$346	\$371	\$361	\$251	
Transaction Count	4.9K	6.1K	11.8K	9.1K	6.7K	4.5K	3.0K	3.5K	5.2K	7.2K	6.1K	5.1K	4.6K	7.0K	13.7K	9.2K	7.3K	4.9K	2.7K	
YOY Spend %	-7.7%	18.2%	6.2%	39.3%	13.5%	-15.0%	4.0%	-3.4%	4.9%	2.2%	-2.8%	-4.7%	-5.7%	20.2%	14.5%	0.7%	9.2%	9.2%	-12.5%	
YOY Card Count %	-5.7%	12.7%	-1.4%	11.5%	-9.2%	-16.8%	-10.8%	-1.9%	-5.0%	-9.3%	-9.1%	-2.8%	-6.2%	12.3%	16.1%	2.9%	4.3%	5.3%	-7.1%	
YOY Avg Ticket %	7.7%	11.7%	6.4%	15.6%	11.3%	27.4%	13.3%	-2.2%	-7.2%	4.5%	-4.5%	1.9%	1.1%	-3.0%	-10.4%	-5.0%	11.4%	-4.1%	-23.4%	
YOY Transaction Count %	-7.0%	14.9%	1.8%	17.6%	-11.7%	-19.3%	-11.1%	-10.5%	-1.7%	-6.1%	-6.8%	-2.9%	-7.3%	15.2%	15.9%	1.4%	7.8%	7.6%	-7.3%	

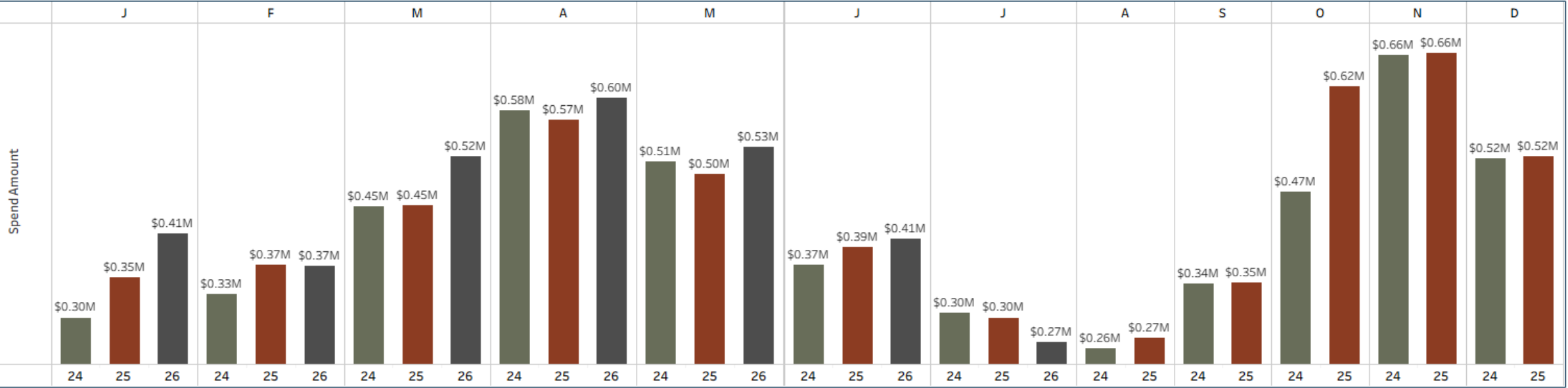


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Domestic Visa Spending by Origin Market

San Diego-Chula Vista-Carlsbad, CA

Source: Visa, Visitors only, Consumer cards only



	2025												2026						
	J	F	M	A	M	J	J	A	S	O	N	D	J	F	M	A	M	J	J
Spend Amount	\$0.35M	\$0.37M	\$0.45M	\$0.57M	\$0.50M	\$0.39M	\$0.30M	\$0.27M	\$0.35M	\$0.62M	\$0.66M	\$0.52M	\$0.41M	\$0.37M	\$0.52M	\$0.60M	\$0.53M	\$0.41M	\$0.27M
Card Count	2.1K	2.0K	2.6K	3.3K	2.9K	2.2K	1.8K	1.7K	1.9K	2.7K	3.6K	2.9K	2.2K	2.0K	2.8K	3.2K	2.9K	2.1K	1.5K
Average Ticket	\$275	\$240	\$204	\$216	\$185	\$206	\$194	\$214	\$216	\$226	\$189	\$227	\$217	\$199	\$212	\$212	\$179	\$174	\$181
Transaction Count	5.3K	5.3K	6.6K	8.6K	7.5K	6.0K	4.6K	4.2K	5.0K	7.1K	9.1K	7.3K	5.3K	5.2K	6.9K	8.5K	7.6K	5.5K	4.0K

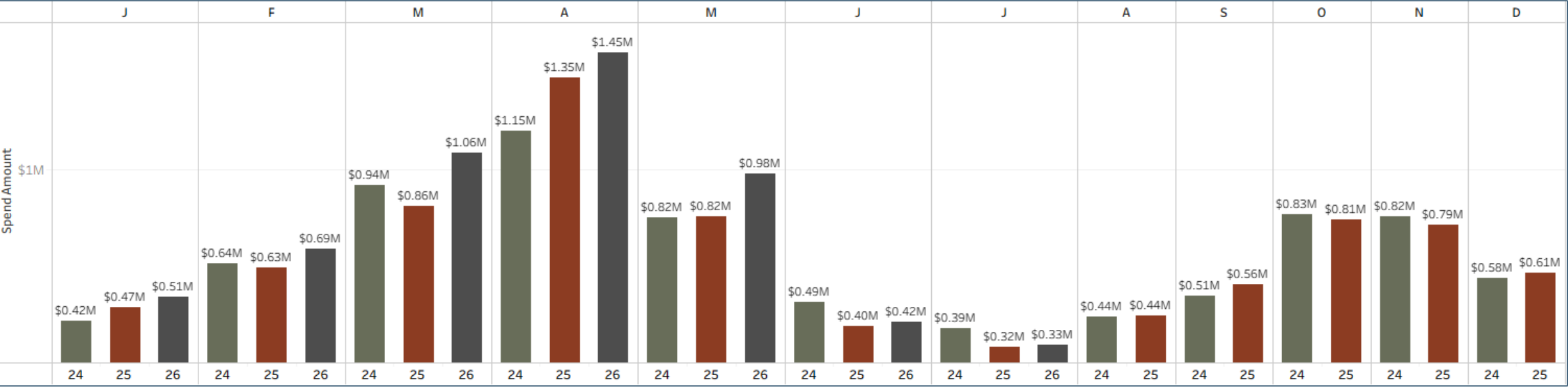
YOY Spend %	18.4%	12.0%	0.3%	-2.0%	-3.4%	6.3%	-1.7%	5.6%	0.4%	31.1%	0.3%	0.6%	17.3%	-0.1%	14.9%	5.2%	7.5%	2.9%	-11.2%
YOY Card Count %	10.3%	5.8%	-8.4%	-3.8%	-1.0%	2.7%	-3.6%	5.3%	-6.3%	1.4%	-5.1%	-0.1%	5.0%	1.3%	7.6%	-2.3%	-1.4%	-5.7%	-14.5%
YOY Avg Ticket %	49.9%	7.5%	-6.4%	8.7%	-4.4%	4.8%	1.2%	-1.4%	1.7%	-40.3%	-22.3%	3.6%	-21.1%	-16.8%	4.0%	-1.7%	-3.1%	-15.6%	-6.5%
YOY Transaction Count %	13.8%	10.6%	-8.6%	-5.4%	-2.7%	7.6%	-4.4%	-0.3%	-6.8%	-0.8%	-7.9%	-0.7%	0.1%	-2.1%	4.6%	-0.4%	0.7%	-8.5%	-12.4%



TOURISM OFFICE

Domestic Visa Spending by Origin Market
New York-Newark-Jersey City, NY-NJ-PA

Source: Visa, Visitors only, Consumer cards only



	2025												2026						
	J	F	M	A	M	J	J	A	S	O	N	D	J	F	M	A	M	J	J
Spend Amount	\$0.47M	\$0.63M	\$0.86M	\$1.35M	\$0.82M	\$0.40M	\$0.32M	\$0.44M	\$0.56M	\$0.81M	\$0.79M	\$0.61M	\$0.51M	\$0.69M	\$1.06M	\$1.45M	\$0.98M	\$0.42M	\$0.33M
Card Count	2.3K	2.8K	3.4K	5.3K	4.2K	2.1K	1.8K	2.3K	2.4K	3.3K	3.4K	3.1K	3.3K	3.1K	4.2K	5.7K	4.2K	2.1K	1.8K
Average Ticket	\$282	\$560	\$501	\$467	\$445	\$441	\$223	\$409	\$354	\$485	\$438	\$384	\$258	\$275	\$484	\$459	\$391	\$399	\$426
Transaction Count	5.7K	7.2K	9.0K	14.2K	10.0K	5.1K	4.4K	5.8K	6.4K	8.6K	8.6K	7.4K	6.9K	8.3K	11.1K	15.2K	11.1K	5.6K	4.2K

YOY Spend %	12.8%	-2.1%	-8.4%	17.7%	0.4%	-19.0%	-18.8%	0.7%	8.5%	-2.4%	-3.9%	3.8%	8.5%	11.0%	23.4%	7.0%	20.1%	4.3%	3.0%
YOY Card Count %	-21.4%	-21.1%	-21.1%	4.3%	-2.5%	-20.6%	-32.9%	-19.6%	-14.3%	-13.3%	-12.0%	-0.3%	40.8%	10.1%	22.1%	8.0%	1.7%	0.8%	1.1%
YOY Avg Ticket %	1.5%	21.4%	-2.4%	-1.8%	-10.4%	7.4%	-37.4%	-8.3%	-14.4%	17.5%	-3.5%	-9.6%	-8.7%	-51.0%	-3.4%	-1.6%	-12.2%	-9.6%	90.6%
YOY Transaction Count %	-7.4%	-13.3%	-14.4%	8.1%	-4.8%	-22.0%	-30.6%	-13.0%	-6.6%	-13.9%	-10.9%	3.1%	20.2%	16.1%	22.9%	6.9%	11.1%	9.8%	-3.4%



Planning For Increased Hotel Room Supply

- We have ~200 hotel rooms coming online
 - Ambiente: Creekside = 36 rooms
 - Senoa Resort = 70 rooms
 - The Darling = 100 rooms
- Additional rooms have been discussed with the Best Western Arroyo Roble, Sky Ranch Lodge, and a local church



Monthly Tourism Research



Lodging Summary

August 2026



Date
August 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
Aug 2026	52.8%	\$258.23	\$136.45	73.1K	38.6K	\$10.0M
YOY % Change	-11.2%	0.5%	-10.8%	6.4%	-5.6%	-5.1%
CYTD 2026	66.1%	\$365.87	\$242.02	556.1K	367.8K	\$134.6M
CYTD YOY % Change	-0.7%	5.4%	4.7%	1.0%	0.3%	5.7%

Short Term Vacation Rental Performance - Scraped Airbnb Data

Source: KeyData (Vacation Area - Residential Zone)

	Occupancy	ADR	RevPAR	Supply	Demand	Revenue
Aug 2026	32.2%	\$414.63	\$133.60	38.2K	12.3K	\$5.1M
YOY % Change	3.2%	1.0%	4.2%	0.1%	3.2%	4.2%
CYTD 2026	50.8%	\$510.92	\$259.36	300.4K	152.5K	\$77.9M
CYTD YOY % Change	4.0%	6.1%	10.3%	3.0%	7.1%	13.6%

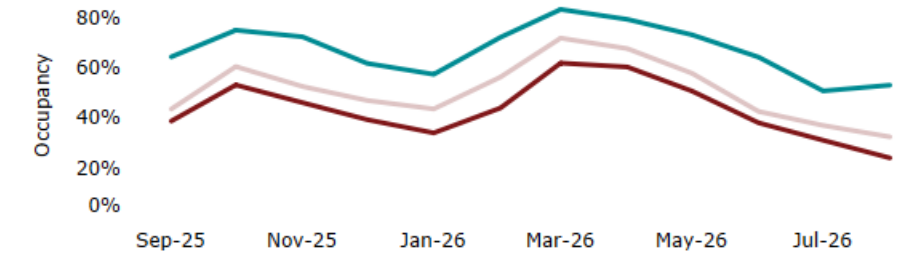
Short Term Vacation Rental Performance - Scraped VRBO Data

Source: KeyData (Vacation Area - Residential Zone)

	Occupancy	ADR	RevPAR	Supply	Demand	Revenue
Aug 2026	23.8%	\$460.78	\$109.68	18.5K	4.4K	\$2.0M
YOY % Change	-10.8%	-3.1%	-13.6%	-9.9%	-19.6%	-22.1%
CYTD 2026	42.7%	\$566.93	\$242.32	148.7K	63.6K	\$36.0M
CYTD YOY % Change	-4.3%	2.9%	-1.6%	-10.4%	-14.3%	-11.8%

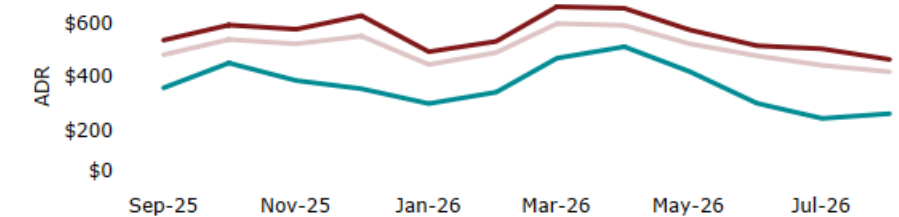
Occupancy by Month

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



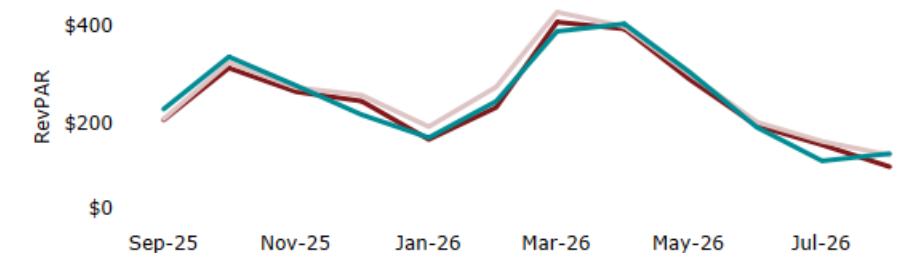
ADR by Month

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



Daily Data Analysis

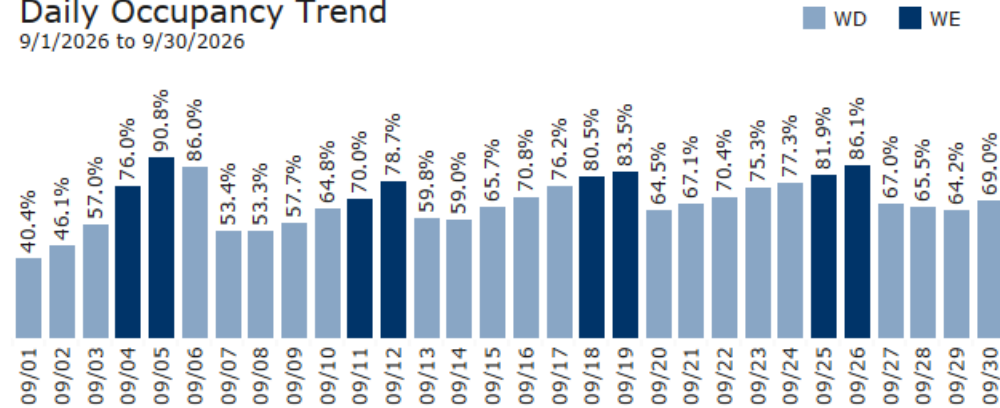
Sedona+ | 9/1/2026 to 9/30/2026 vs. Same-time-last-year



	Occupancy	ADR	RevPAR	Supply	Demand	Revenue
9/1/2026 to 9/30/2026	68.6%	\$387.91	\$266.09	70,740	48,525	\$18,823,319
9/2/2025 to 10/1/2025	65.4%	\$357.77	\$233.95	66,540	43,512	\$15,567,259
YOY % Change	+4.9%	+8.4%	+13.7%	+6.3%	+11.5%	+20.9%

Daily Occupancy Trend

9/1/2026 to 9/30/2026



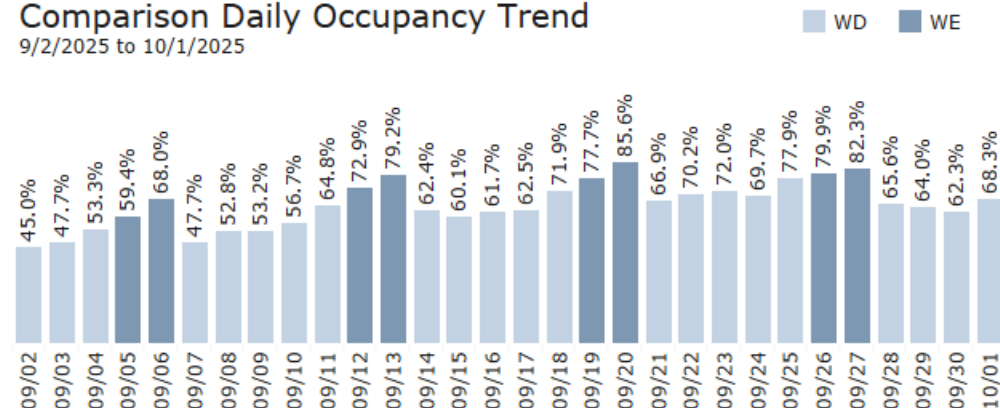
Performance by Day-of Week

9/1/2026 to 9/30/2026

	Sun	Mon	Tue	Wed	Thu	Fri	Sat	WD	WE
Occ	69.3%	61.2%	58.8%	63.8%	68.8%	77.1%	84.8%	64.1%	80.9%
ADR	\$389	\$361	\$356	\$355	\$352	\$440	\$448	\$362	\$444
RevPAR	\$269	\$221	\$209	\$226	\$242	\$339	\$379	\$232	\$359
Supply	9.4K	9.4K	11.8K	11.8K	9.4K	9.4K	9.4K	51.9K	18.9K
Demand	6.5K	5.8K	6.9K	7.5K	6.5K	7.3K	8.0K	33.3K	15.3K
Revenue	\$2.5M	\$2.1M	\$2.5M	\$2.7M	\$2.3M	\$3.2M	\$3.6M	\$12.0M	\$6.8M

Comparison Daily Occupancy Trend

9/2/2025 to 10/1/2025



% Change by Day-of Week

vs. Same-time-last-year

	Sun	Mon	Tue	Wed	Thu	Fri	Sat	WD	WE
Occ	+14.3%	-0.8%	-0.1%	+4.6%	+2.8%	+6.3%	+7.6%	+4.0%	+7.0%
ADR	+17.0%	+12.3%	+11.2%	+7.3%	+0.3%	+4.8%	+7.5%	+9.4%	+6.2%
RevPAR	+33.7%	+11.4%	+11.1%	+12.2%	+3.1%	+11.4%	+15.7%	+13.8%	+13.6%
Supply	+6.3%	+6.3%	+6.3%	+6.3%	+6.3%	+6.3%	+6.3%	+6.3%	+6.3%
Demand	+21.5%	+5.4%	+6.2%	+11.2%	+9.3%	+13.0%	+14.4%	+10.5%	+13.7%
Revenue	+42.2%	+18.4%	+18.1%	+19.3%	+9.6%	+18.5%	+23.0%	+21.0%	+20.8%

Source: STR

Powered by SYMPHONY | TOURISM ECONOMICS



Filters

Market
Sedona+

Day Of Week
All

Start
9/1/2026

End
9/30/2026

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

Custom Comp. Range

Start
9/21/2025

End
10/4/2025

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.

THANK YOU



SEDONA
stay inspired