

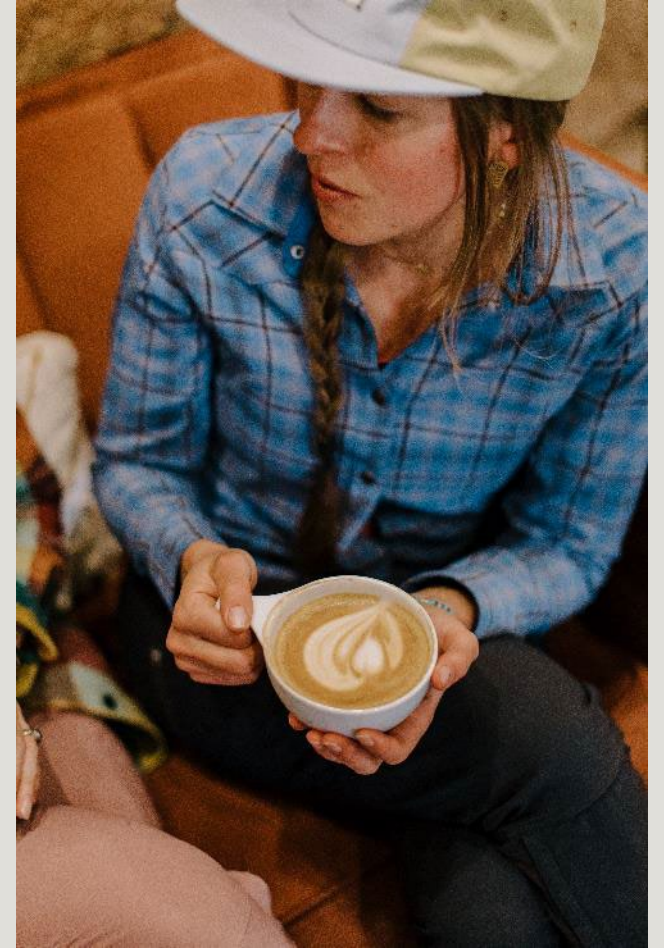


CITY OF SEDONA **TOURISM PROGRAM**

Lodging Council Meeting
October 14, 2025

Agenda Items

- Winter 2025/2026 Campaign Update
- State of Sedona Tourism – August 2025



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Winter 2025 Campaign Strategy

Campaign Overview

1) Oct. 15 to Feb. 15 (41 days sooner than Winter 24) for \$250,000:

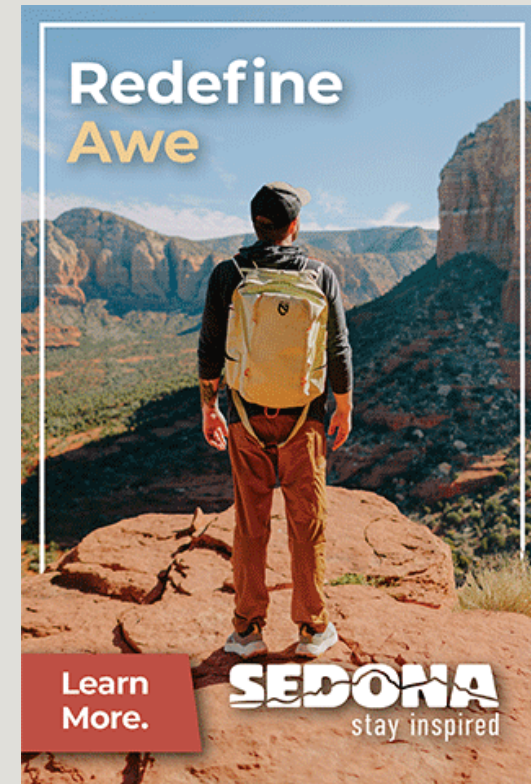
- Paid search (\$11,280 → \$18,000)
- Meta ads out-of-market (\$28,000 → \$40,000)
- Meta ads for in-market (\$13,000 → \$17,000)
- Attribution web ads for out-of-market (\$68,000 → \$85,000)
- Attribution CTV ads for out-of-market (\$36,000 → \$90,000)

2) In-market Meta targeting includes:

- 25-mile radius around Sedona and Phoenix

3) Out-of-market cities includes:

- | | | | |
|---------------|---------------|-----------|-----------------|
| • Phoenix | • Minneapolis | • Chicago | • New York |
| • Los Angeles | • Las Vegas | • Seattle | • San Francisco |
| • Tucson | • San Diego | • Denver | |



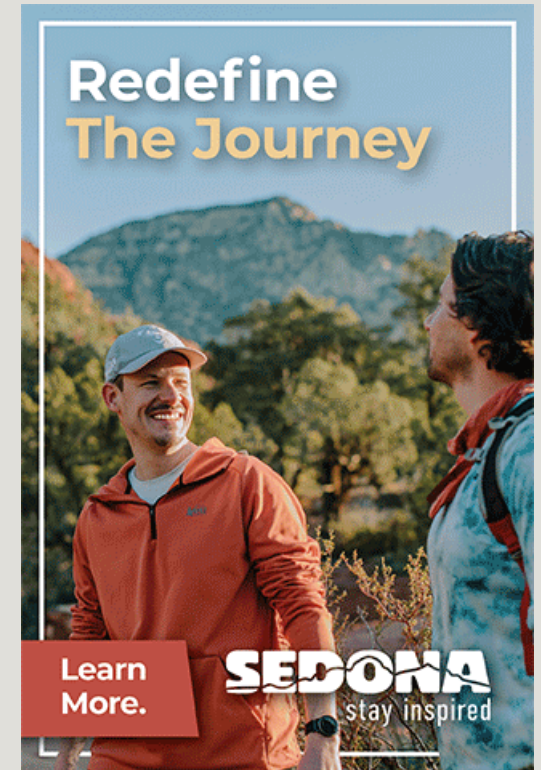
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Campaign Concept

Continue the Redefine Campaign with Winter themes of Redefine:

- Winter
- Sanctuary
- Masterpiece
- Passport
- Bucket List
- Awe
- Escape
- The Journey
- Silence
- What Matters

*The overarching goal is to present Sedona as an alternative to an international vacation this winter



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Target Audiences

Household Income

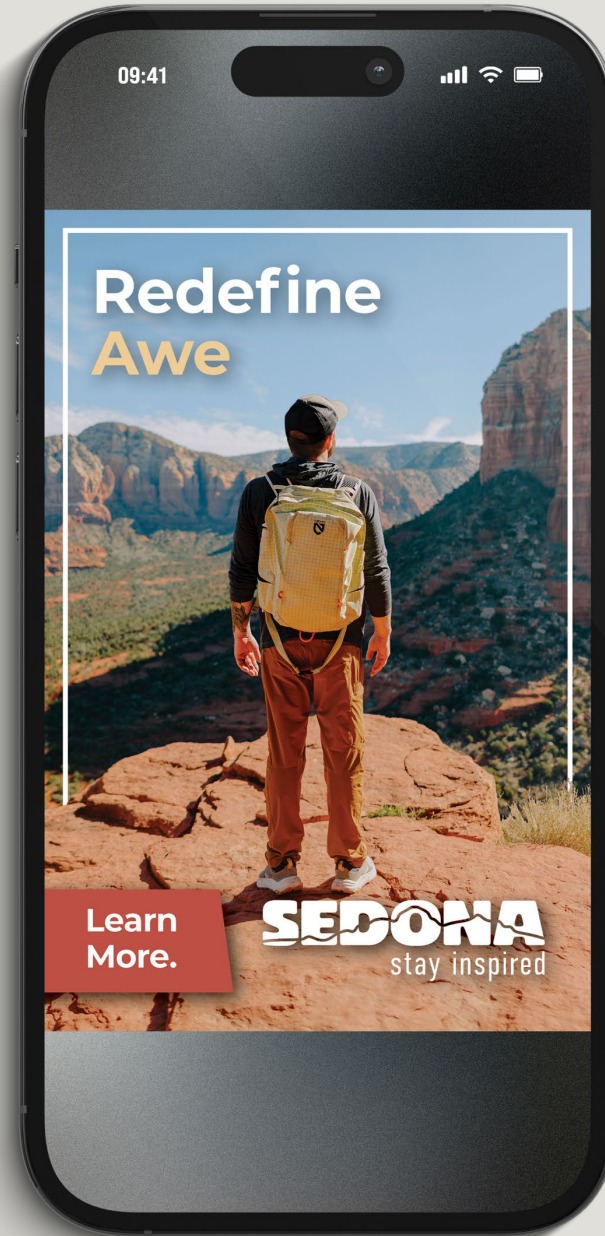
- Our out-of-market ads reach our target personas with household incomes of \$100k+
- We are testing an additional approach that starts at household incomes of \$250k+

Target Personas

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



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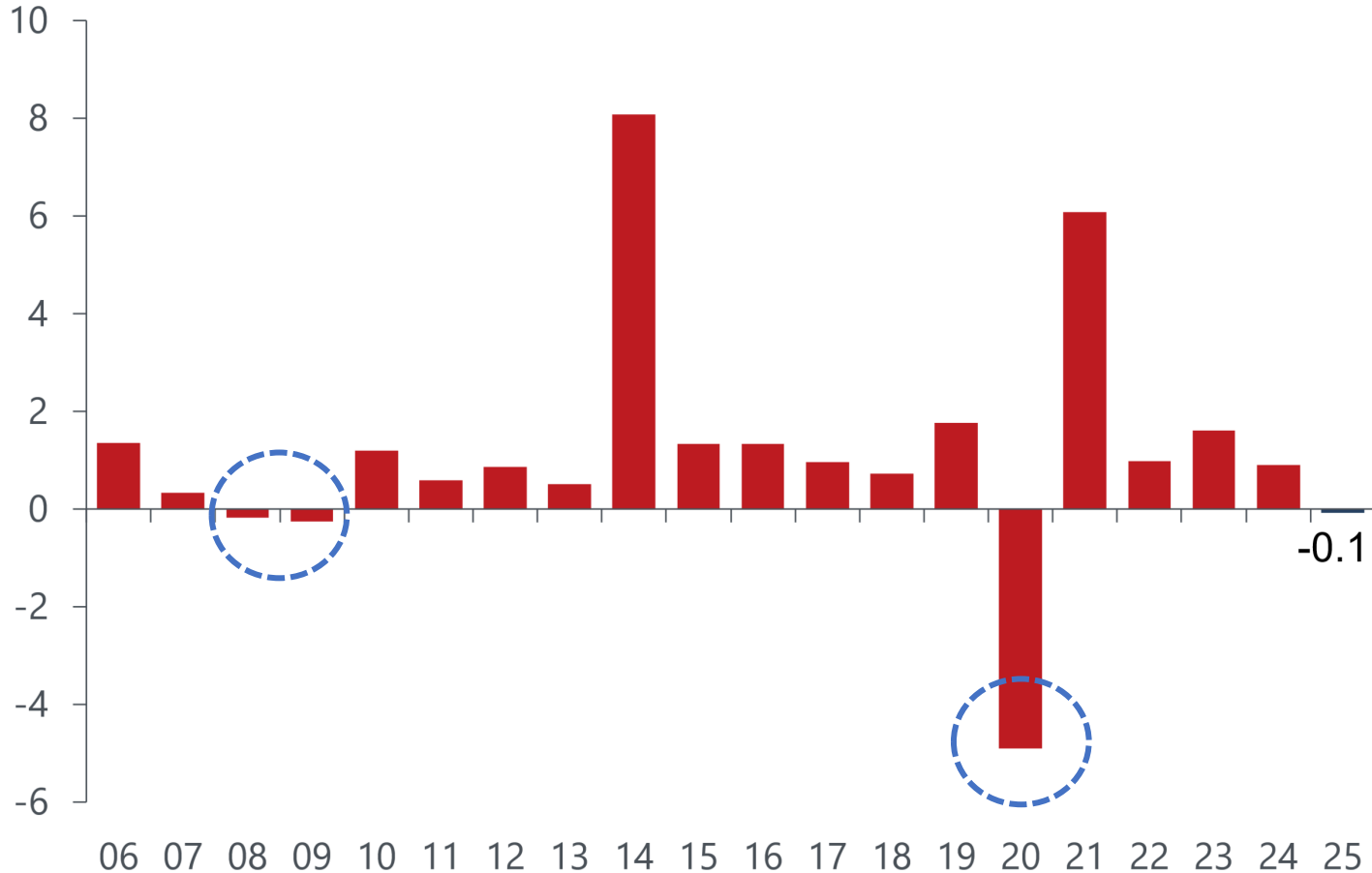
Monthly Summary Report

August 2025

Consumers put spending on hold

US: Real consumer spending, January-June

Percent change



Stagnation in consumer spending is rare outside a recession...

**Last time: Pandemic
Before that: Great Recession**



Monthly Historical Lodging

August 2025 | Sedona



Hotel Performance

Source: STR (Sedona+)

	Occupancy	ADR	RevPAR	Revenue
Aug 2025	59.6%	\$256.28	\$152.67	\$10.4M
YOY % Change	+4.4% YOY	+2.1% YOY	+6.6% YOY	+0.4% YOY
Calendar Year-to-Date	66.6%	\$346.19	\$230.67	\$126.5M
YTD YOY % Change	-1.7% YOY	+5.1% YOY	+3.3% YOY	-0.4% YOY

Short Term Vacation Rental Performance - Scraped AirBnB Data

Source: KeyData (Vacation Area - Residential Zone)

	Occupancy	ADR	RevPAR	Revenue
Aug 2025	31.4%	\$391.98	\$123.15	\$4.7M
YOY % Change	+7.0% YOY	+26.3% YOY	+35.2% YOY	+23.4% YOY
Calendar Year-to-Date	46.6%	\$410.29	\$191.34	\$58.3M
YTD YOY % Change	+4.6% YOY	+11.7% YOY	+16.9% YOY	+10.7% YOY

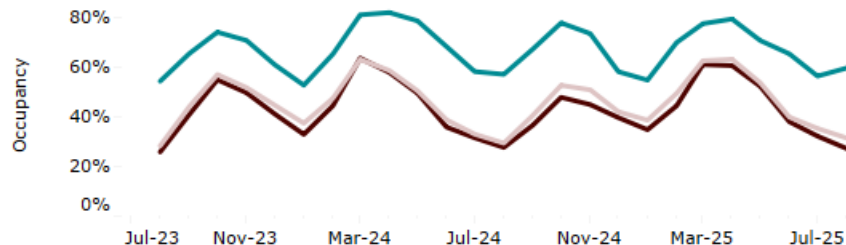
Short Term Vacation Rental Performance - Scraped VRBO Data

Source: KeyData (Vacation Area - Residential Zone)

	Occupancy	ADR	RevPAR	Revenue
Aug 2025	27.2%	\$424.02	\$115.32	\$2.4M
YOY % Change	-1.5% YOY	+9.1% YOY	+7.4% YOY	+36.0% YOY
Calendar Year-to-Date	43.8%	\$449.55	\$196.92	\$31.9M
YTD YOY % Change	+2.2% YOY	+6.1% YOY	+8.4% YOY	+35.3% YOY

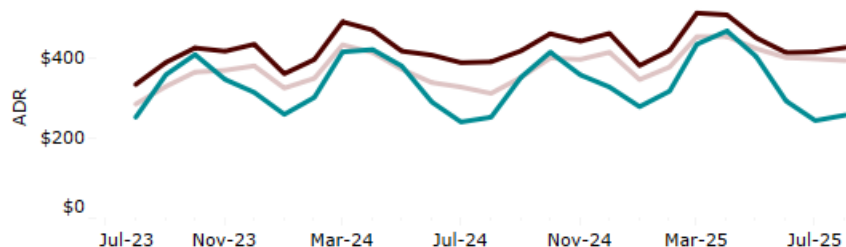
Occupancy by Month

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



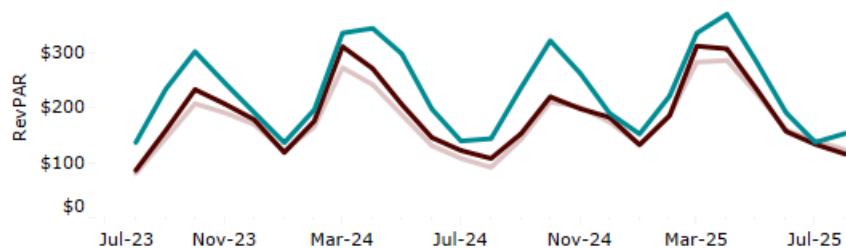
ADR by Month

■ 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
66.6%	\$346	\$231	548.4K	365.4K	\$126.5M
-1.7%	+5.1%	+3.3%	-3.6%	-5.3%	-0.4%

Monthly Performance

	OCC	% CHG	ADR	% CHG	RevPAR	% CHG
Jun	65.3%	-4.3%	\$291	+0.8%	\$190	-3.4%
Jul	56.3%	-3.1%	\$243	+1.5%	\$137	-1.7%
Aug	59.6%	+4.4%	\$256	+2.1%	\$153	+6.6%

Village of Oak Creek+ Hotel Performance

Calendar Year-to-Date Performance
compared to last year

Occupancy	ADR	RevPAR	Supply	Demand	Revenue
65.6%	\$207	\$136	190.0K	124.6K	\$25.8M
+3.8%	+2.3%	+6.1%		+3.8%	+6.1%

Monthly Performance

	OCC	% CHG	ADR	% CHG	RevPAR	% CHG
Jun	64.5%	-3.8%	\$179	-2.6%	\$116	-6.3%
Jul	56.9%	-7.5%	\$159	-1.2%	\$91	-8.6%
Aug	60.1%	+8.6%	\$165	+5.8%	\$99	+14.9%

Short Term Rental Review

August 2025



Residential Zone (Airbnb) Performance

Calendar Year-to-Date Performance
compared to last year

Occupancy
46.6%
+4.6%

ADR
\$410
+11.7%

RevPAR
\$191
+16.9%

Monthly Performance

	OCC	% CHG	ADR	% CHG	RevPAR	% CHG
Jun	39.8%	+2.9%	\$399	+18.4%	\$159	+21.8%
Jul	35.3%	+7.0%	\$396	+21.6%	\$140	+30.1%
Aug	31.4%	+7.0%	\$392	+26.3%	\$123	+35.2%

Residential Zone (VRBO) Performance

Calendar Year-to-Date Performance
compared to last year

Occupancy
43.8%
+2.2%

ADR
\$450
+6.1%

RevPAR
\$197
+8.4%

Monthly Performance

	OCC	% CHG	ADR	% CHG	RevPAR	% CHG
Jun	38.0%	+6.1%	\$412	+1.5%	\$156	+7.6%
Jul	32.2%	+2.2%	\$413	+6.9%	\$133	+9.2%
Aug	27.2%	-1.5%	\$424	+9.1%	\$115	+7.4%

Note: Occupancy is not reflective of overall changes in short term rental demand
Source: KeyData (Direct Source methodology = directly submitted by property managers)



Hotel 4 Month Outlook

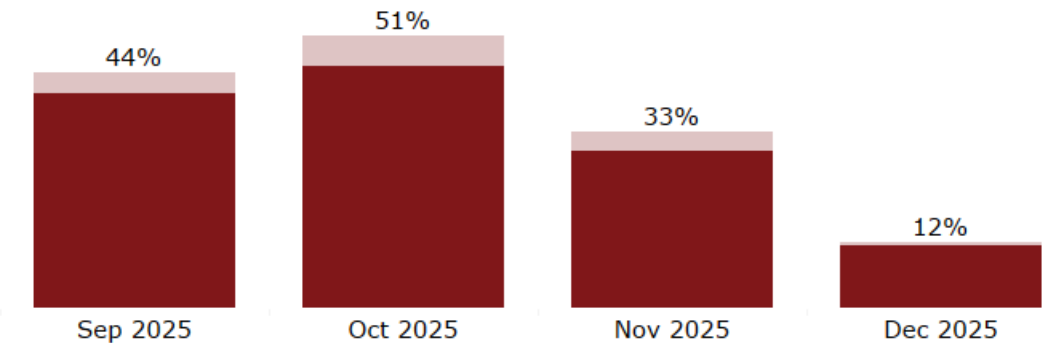
Data for zip code 86336



Occupancy as of 10/8/2025

Current Occupancy

Group Committed Transient



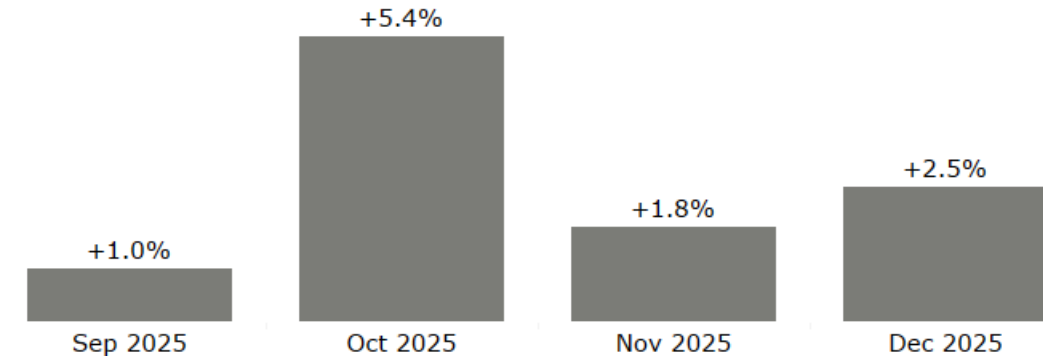
Bookings by Segment

	Sep 2025	Oct 2025	Nov 2025	Dec 2025
Transient	13.7K	15.9K	10.0K	4.1K
Group Committed	1.4K	2.1K	1.2K	265
Total with Group Committed	15.1K	18.0K	11.3K	4.4K

Rooms
Booked

Booking Pace

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

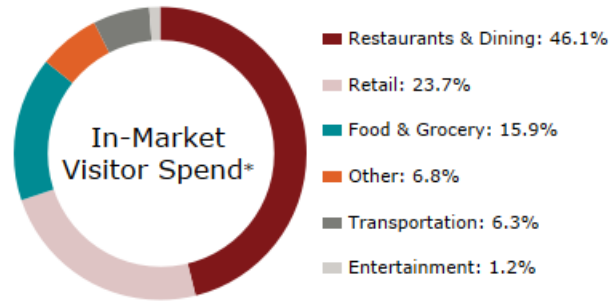


YOY % Change

	Sep 2025	Oct 2025	Nov 2025	Dec 2025
Transient	+2.5%	+10.8%	+1.8%	+2.8%
Group Committed	-11.8%	-23.4%	+1.7%	-1.5%
Total with Group Committed	+1.0%	+5.4%	+1.8%	+2.5%

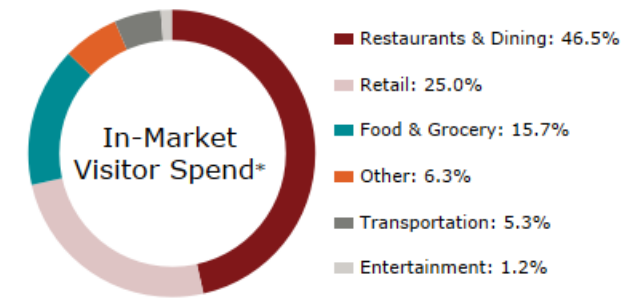
Monthly Visitor Credit Card Spending

August 2025 Card Spend
\$17.4M
+5.3% YOY



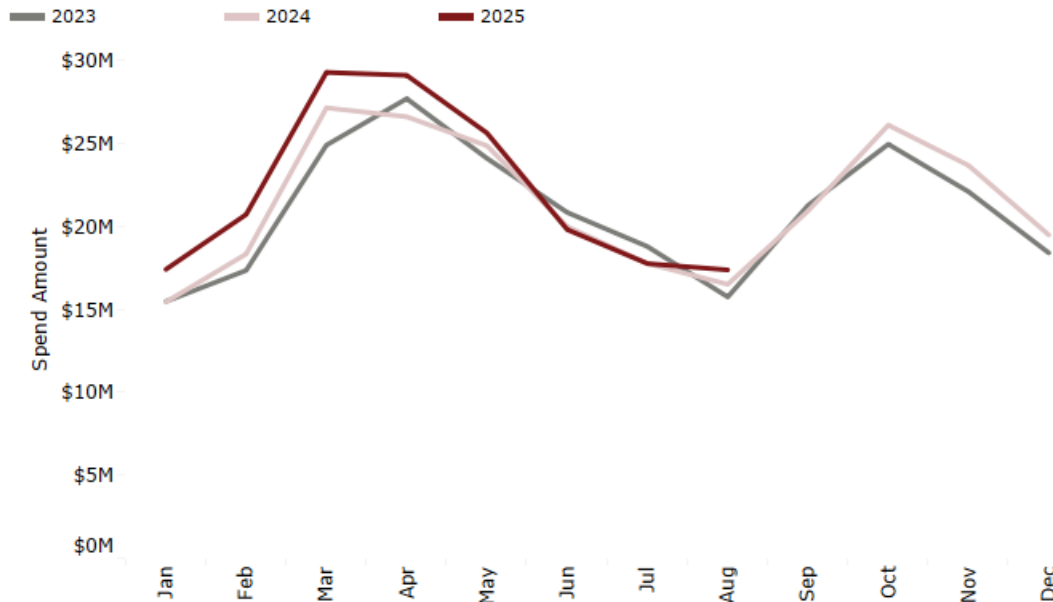
Calendar Year-to-Date Visitor Credit Card Spending

Jan - Aug 2025 Card Spend
\$177.0M
+6.3% YOY



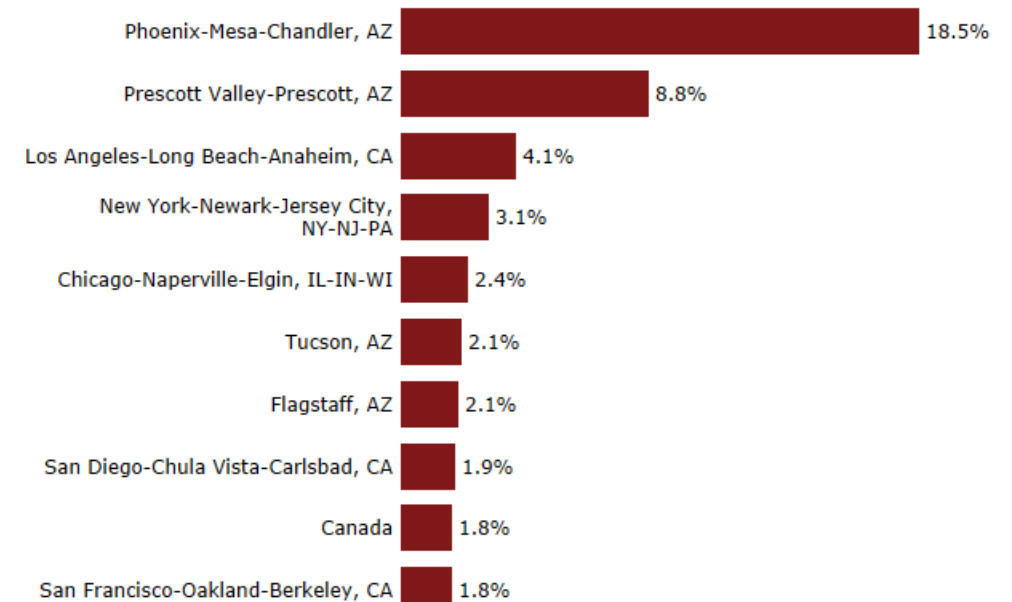
Visitor Spending by Month

Last Three Calendar Years



Top Visitor Origins by Spending

Jan - Aug 2025



Sedona Traffic Data

Month	179 North			89A North			89A South			Total		
	2024	2025	%	2024	2025	%	2024	2025	%	2024	2025	%
May	62,002	74,230	16%	77,764	142,069	45%	93,377	101,668	8%	233,143	317,967	27%
June	69,673	55,501	-26%	87,540	104,312	16%	107,573	77,737	-38%	264,786	237,550	-11%
July	55,898	54,716	-2%	62,917	104,310	40%	84,371	77,010	-10%	203,186	236,036	14%
August	69,468	67,721	-3%	91,848	127,940	28%	98,236	94,363	-4%	259,552	290,024	11%
September	57,107	55,411	-3%	104,311	106,637	2%	77,908	73,824	-6%	239,326	235,872	-1%
TOTAL	257,041	252,168	-2%	320,069	478,631	33%	383,557	350,778	-9%	1,199,993	1,317,449	9%



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THANK YOU

