



Town Hall - 551 Hot Springs Blvd.
Pagosa Springs, CO 81147

AGENDA

Pagosa Springs Area Tourism Board Meeting
Wednesday, September 3, 2025 @ 4:00 PM

1. REMOTE PARTICIPATION

The public is highly encouraged to join via Zoom conference call as space is limited in the meeting room

Join Zoom Meeting By Computer - <https://us06web.zoom.us/j/81573456458>

Dial by Phone - 1-669-900-6833 US - Meeting ID: 815 7345 6458

I. CALL MEETING TO ORDER

II. PUBLIC COMMENT

Please sign in to make public comment

III. CONSENT AGENDA

1. Approval of the August 6th, 2025 Meeting Minutes

[Draft minutes080625](#)

IV. REPORTS TO BOARD

1. Chair Report
2. Director Report
[Agenda Brief - Director Report Sept](#)
3. Chamber of Commerce Report
4. Board of Realtors Report
5. Lodging Association Report
6. Other Board Member Reports

V. NEW BUSINESS

1. PARC Presentation - Amanda Gadowski / Bob Milford
2. Draft 2026 Lodging Tax Budget

VI. OLD BUSINESS

VII. NEXT TOURISM BOARD MEETING OCTOBER 1ST AT 4:00 PM

VIII. ADJOURNMENT



Town Hall - 551 Hot Springs Boulevard
Pagosa Springs, CO 81147

MINUTES

Pagosa Springs Area Tourism Board Meeting
August 6, 2025 @ 4:00 PM

A regular meeting of the Pagosa Springs Area Tourism Board was called to order on August 6, 2025, at 4:00 PM in the Town Hall - 551 Hot Springs Boulevard.

BOARD PRESENT: Board Member Johnson, Board Member Lucero, Board Member Dufour, Shane Prince, Board Member Marchand, Board Member Ranson, and Board Member Scull

BOARD ABSENT: Council Member Williams and Sarah Mashue

I. CALL MEETING TO ORDER

II. PUBLIC COMMENT – There was no public comment.

III. CONSENT AGENDA

1. Approval of the July 2nd Meeting Minutes

Shane Prince moved to approve consent agenda, Board Member Marchand seconded.

Carried.

IV. REPORTS TO BOARD

1. Chair Report

Board Chair Lucero thanked everyone for being at the meeting. We have one hour for the Board meeting tonight because the joint Town and County Work Session will begin at 5pm to discuss 2026 budget priorities.

2. Director Report

Director said last week, the Colorado Tourism Office released the 2024 visitor spend data. Archuleta County saw a 4.8% increase in visitor spending. 2024 statewide visitor spend was up 0.5% over 2023. The state has been working with Dean Runyan for 20 years to produce this report. Director said she will be on an RV Explorers pod cast next week. Director said we have now received all of the outstanding lodging tax collections. The report is updated and the finance team credited the payments to the month they were due. The piece of that puzzle that we don't have clarity on is vacation rentals, because Airbnb and Vrbo pay tax when the booking takes place. So unless they're staying that same month they book it's not recognized for that month. About 30% of our town's lodging tax collections come from vacation rentals. June numbers were not reflected in the Blue Room reports because they sent the report before we got the June numbers. For Town collections, June totaled \$93,967 and reflected a 19.4% increase over 2024, or \$15,265. Year to date collections show a 14.3% increase, or \$54,448.85. Q1 County collections reflect a 15.8% increase, or \$18,344. Combined Q1, reflected an 11.65% increase, or \$35,988. Q2 for Town collections shows an increase of 19.57%, or \$36,805. For placer data we will be able to pull June data in a few weeks. The folder is updated through May 2025. We don't have sales tax for June yet. Sales tax comes out about 2 months later. May sales tax was up about 3%.

3. Chamber of Commerce Report

Chamber of Commerce Representative Austin Marchand said the new Chamber of Commerce Director Sandy Douthey has started training with Mary Jo. There are several Chamber events coming up. Grillin'

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& Distillin' is on 8/23/25 and they still need more grillers. ColorFest has moved to Yamaguchi Park. The Wednesday Wine Walk had a great turn out with about 118 people vs the first one had about 75. The next Wine Walk is hosted by Rotary on 8/27/25. The Chamber is getting a lot of people contacting them about the housing at the Enclave by Walmart. There is a business happy hour at Cross Fit on 8/22/25.

4. Board of Realtors Report

Board of Realtors and Tourism Board member Amy Johnson said her report is looking at single family homes up to a million dollars for May, June and July 2024 vs 2025. In 2024 the median sale price was \$700,000 for a single family home and this year it is \$614,500. Pricing has softened a bit in the market. The median price per square foot last year was \$366, now it is \$360. The number of active listings in 2024 was 175, right now we have 222 up almost 27%. The sold listings are holding steady. We had 77 last year and 78 this year. We have recently flipped to being more of a buyer's market with 9 months of supply. The Board of Realtors meets bimonthly and are very active in scholarships and escrow where brokers can choose to make donations out of their closings. High school students upon graduation get paid for all A's and B's so the checks can be significant up to \$1,800 for their high school career. They are working on ramping up this program and increasing participation by more brokers. The board also supports Bucks for Bikes, Pagosa Outreach Connection and Veterans Fly fishing.

5. Lodging Association Report

Jesse Hensle with The Springs Resort said the Lodging Association currently has 13 members with more in the process of joining. The full member list is not yet public. Pacing for August and September bookings is down, which aligns with a recent Colorado Sun article reporting a 2% year-over-year decrease in statewide visitation and a 10% decrease in short-term rentals (STRs). Jesse said the good news is that previous dips in May and June were successfully recovered with short-term bookings. The focus is on finding ways to use marketing to quickly impact these numbers. Jesse Hensle said the Lodging Association and the Tourism Boards main goal is to drive overall visitation to Pagosa Springs, not just to lodging or STRs specifically. The Lodging Association believes that mobile data, like that from placer.ai, is a valuable tool for tracking visitation. He noted a strong correlation between placer.ai occupancy data and tax collections. Moving forward, the group wants to develop a plan using multiple metrics to measure tourism effectiveness, advocating for marketing transparency and focusing on effective strategies. The Lodging Association wants to partner with the tourism board on an ad for the 2026 Colorado Tourism Visitor Guide, which has a deadline in October and a cost of approximately \$16,000. They hope to be included in the discussion to provide input on the ad and how Pagosa Springs is promoted. Jesse thanked the community for their support, which led to The Springs Resort being named the #1 Hot Springs and the #1 Best Spa Resort in the U.S. by USA Today. He hopes this recognition will bring significant marketing value to the entire Pagosa Springs community.

6. Other Board Member Updates

County Commissioner Rep John Ranson said they picked up the keys today for the new temporary County offices at the Wyndham and are hoping to be open at the end of Aug. The County Fair last week went well overall. They are preparing for budget now. They are going to work on a survey regarding lodging tax for next year. They decided not to take it to the voters this year because they need more time to get the word out. They just received the RFP for the Admin building and it will be coming out soon.

Board Chair Lucero said he finds it interesting that the Lodging Association ask for transparency but they are not willing to share the names of their members. We know who the members of the Realtors Association are and they members of the Chamber of Commerce.

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V. NEW BUSINESS

1. Consideration of Construction Transportation Funding Request

The Tourism Board has \$64,800 in the 2025 budget for construction transportation. While there was no specific plan for the funds, the idea was to have funds available as needs were identified once construction began. The Director has been meeting with Andrew Mylroie, Transportation Coordinator, for Mountain Express Transit. Director and Andy worked together to create new MET bus stop signs to make the bus stops stand out a little more. The signs are in the process of being installed. Additionally, Director has been meeting with Jason Cox regarding his new Pagosa Zip Trips, a pedal cab concept. Town Council approved Pagosa Zip Trips to operate during their July 15th meeting. A recent discussion with Jason, Andy and the Director focused on leveraging the MET to get people downtown and considering the Pagosa Zip Trips as last mile service around the core downtown area. Pagosa Zip Trips plans to operate as a free service during the fall 2025 season. To expand use of the MET, the group discussed having a transit app developed. Andy has met with Durango's transit team and connected with transit app developer, VIA. He is awaiting pricing from VIA, as it is based on number of buses operating. A transit app is a mobile application designed to help passengers plan, track, and pay for public transportation. It connects riders with real-time bus schedules, maps, service alerts, and ticketing systems. Included in the packet for review is a request from Pagosa Zip Trips for \$10,707 to cover operating expenses for it to be a free service in 2025. Pagosa Zip Trips is not requesting capital expenses to start the business (i.e. Pedal Cabs). Director would also like the Tourism Board to consider funding the development of the transit app. Expanded transportation will benefit tourism long after the construction project is completed.

Jason Cox and Mike Candelaria were present at the meeting. Jason Cox said they are ordering the pedicab this week. They decided to order a new one with motorcycle tires and it can haul 4-6 passengers. They should have the vehicle by mid to late September and will run it through the fall to test the market. They will not charge for rides this fall. He said his friend in Pueblo who has a similar company also goes to senior citizen homes and give the residents rides for entertainment. They originally planned to patrol and hit up the large parking areas downtown that were made for the construction project but they aren't seeing much occupancy in those lots. They are also figuring out details for the dispatch option. So this request is to help cover the cost of drivers, employees, insurance fees. This could end up being a last mile solution for the core downtown and they would ideally like to run some uptown as well. It will also be used for events. They are buying one pedicab this year and hopefully adding another 1-2 next year.

Andy Mylroie, Transportation Coordinator for Mountain Express Transit was also present at the meeting. Director said Andy met with an app developer VIA. We are hoping the quote was on the high end. We intend to connect the pedicab into the transit app and have a robust transportation app for the community. We are aiming for the app and pedicab costs to be around \$54,000. Some transit apps have yearly fees so we will need to factor that into the future budgets. The remaining \$10,000 was requested by Town Council for Tourism to help pay for upgrades at the new skyrocket trail at the new property behind Tractor Supply.

Board Chair Lucero said he has a concern that since this is taxpayer money it might look like we are supporting a business. Mike Candelaria said that it is not their intent to make money off of this business. They are doing this to help the community. He said for every dollar you put into public transit \$4-7 are put back into the community. They feel it will help more people move around down town and enjoy the riverwalk and coffee shops and easily hop from one business to the next. It will benefit all of the

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businesses. They are not going to charge for rides this year. They will have other revenue streams and will be advertising.

Board Member Johnson moved to approve funding Pagosa Zip Trips for \$10,707 to cover operating expenses for it to be a free service in 2025 and to consider funding the development of the transit app, Board Member Marchand seconded.

Carried.

2. Visitor Sentiment Survey

Director would like the Tourism Board's input on pursuing a Visitor Sentiment Survey. We had elements of visitor sentiment as part of the Destination Master Plan, adopted in 2019. However, a lot has changed in the last 6 years. A visitor sentiment study provides destinations with insight into how travelers perceive and emotionally respond to their experiences. This goes beyond typical satisfaction scores or economic data, uncovering what visitors truly value or dislike about a place. For destinations, it becomes a strategic tool to identify both strengths and areas needing improvement, such as infrastructure, customer service, or branding alignment. It helps ensure that a destination's messaging reflects the actual visitor experience or, conversely, that the experience evolves to fulfill the brand promise. From an operational standpoint, sentiment data guides resource allocation and improvement efforts. Destinations can use it to prioritize enhancements that will most affect visitor satisfaction and loyalty. It also allows them to track sentiment over time, especially during peak seasons or after major events, to measure impact and adjust strategies as needed. This continuous feedback loop helps improve the visitor experience in real-time and supports ongoing destination management. For marketing, sentiment analysis helps tailor campaigns to match the emotional drivers of travelers, increasing resonance and conversion. It also provides compelling evidence to stakeholders—like local businesses and public agencies—of tourism's value and areas for collaboration. Director reached out to Market to Mission, Dave Santucci for an estimate, included in the packet. If approved, Director would find funds in the 2025 budget and begin his effort soon.

Director said we'll target existing visitors and people who may have chosen another destination. We want to understand what they enjoyed about Pagosa, what their experience was like, what they did not like, why they chose another destination if they did not choose Pagosa. They might help identify strengths and weaknesses of us as a tourism destination. The price for the survey through Mission to Market is \$9,750. The avenue to get the survey out will likely be email and there will be an enter to win cash incentive to do the survey. We will survey visitors at the visitor center and businesses can promote the survey. We will also have the survey on our welcome page. We can target our leads from colorado.com. Board Member DuFour said it might be better to do the survey during an average time rather than doing it now with the construction project going. Director said she sees this as something we will do on an annual basis and maybe even seasonal surveys.

Shane Prince moved to approve Mission2Market to conduct a Visitor Sentiment Survey in 2025, Board Member Johnson seconded.

Carried.

3. 2026 CTO Marketing Grant

The Colorado Tourism Office offers an annual Marketing Grant program. The CTO's Marketing Grant Program provides funding to not-for-profit organizations in the State of Colorado for the purpose of promoting the state or a region as a tourism destination. For every \$1 the organization allocates to the program, the Colorado Tourism Office will provide \$2 in matching funds. The Colorado Tourism Office will award grants up to \$49,000. Funds will be awarded to organizations whose objective is to promote

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the state or the defined region, targeting audiences outside of Colorado. For FY 2026 grant, applications that include 250/150 promotions will receive bonus points. Since fall 2015, Pagosa Springs has partnered with Ouray, Glenwood Springs, Steamboat Springs and Chaffee County to create and promote the Colorado Historic Hot Springs Loop. The partnership has been awarded funds from the Colorado Tourism Office each year from 2016 - 2024. The Pagosa Springs Area Tourism Board (through the Town) served as the fiscal agent for the Hot Springs Loop between 2015 and 2020. Steamboat Springs served as the fiscal agent between 2021 and 2024. We continue to work with the Hot Springs Loop and continue to receive a lot more impact than our annual \$2,500 contribution. The Loop did not pursue a grant in 2025, however, all participating destinations provided \$2,500 towards continued promotions via email, social media and media opportunities. In 2024 and 2025, Visit Pagosa partnered with Visit Alamosa for a grant to target high value international audiences. The grants were both awarded the full amount, resulting in a \$60,000 project budget in 2024 and \$75,000 in 2025. Visit Pagosa and Visit Alamosa recently met to discuss the future of the partnership. We have determined investing in advertising efforts reaching international audiences is not ideal given the current political climate. While the implementation of the FY 2025 grant is underway, the deadline to apply for FY 2026 grant funding is August 28th. We are interested in applying for the grant once again in 2026, however with a focus on domestic advertising focused on historical offerings, targeting shared markets of both destinations. The grant favors collaborations and in 2026, inclusion of 250/150 efforts will be rewarded. Visit Pagosa and Visit Alamosa staff are currently evaluating various opportunities to include in the 2026 grant application. The match of \$12,250 for FY 2026 would be budgeted in the 2026 marketing line item of the lodging tax budget. At this time, staff is requesting approval of a letter of support for the grant application. With approval of each board, staff will meet to draft marketing plan for this opportunity to include in the grant application. We will be notified in early November if the application is accepted. This is an extremely competitive grant. One additional change for 2026, if your organization has been awarded a Tourism Marketing Grant for the past 3 consecutive years, you are required to "sit out" a year and will be ineligible to apply. If the application is successful for 2026, Visit Pagosa will not be able to apply for the grant in FY 2027.

Board Member Dufour moved to approve submitting an application for The Colorado Tourism Office 2026 Marketing Grant program, Shane Prince seconded.

Carried.

- VI. OLD BUSINESS**
- VII. BOARD IDEAS AND COMMENTS**
- VIII. NEXT TOURISM BOARD MEETING SEPTEMBER 3RD AT 4:00 PM**
- IX. ADJOURNMENT**



AGENDA BRIEF

MEETING: Pagosa Springs Area Tourism Board - 03 Sep 2025
FROM: Jennifer Green, Executive Director

PROJECT: Director Report
ACTION: Update and Discussion

PURPOSE/BACKGROUND:

TOURISM BOARD INFORMATION

The google drive folder featuring all materials related to the Tourism Board continues to be updated. The folder includes a variety of information, such as meeting minutes, contact information, brand overview, marketing plan, budget, research, bylaws, data, statewide research, mission statement and much more.
https://drive.google.com/drive/folders/12Cy6vSyq_8oF5_nEMsG0tfe8aZgPV3Hu?usp=sharing

LODGERS TAX FINANCIAL REPORT

Town lodging tax collections are due on the 20th of each month, following the month of collections. Reports from the Town are usually available at the beginning of each month. July collections have missing collections and a glitch with the Town's online payment system. Town finance staff has submitted a trouble ticket, however no additional information was provided given the holiday weekend.

July 2024 indicated a large payment that was due in March 2024. For 2025, Town finance team is once again crediting the payments for the month they are due and not when they are received. Additionally, one property that reported a decent amount was sold and is now workforce housing. While 2025 town lodging tax will be down, it will not be an apples to apples comparison to 2024.

The spreadsheet has been updated with all payments through June. All outstanding payments for 2025 have been applied to the month they were due. For Town collections, June totaled \$93,967 and reflected a 19.4% increase, or \$15,265. Year to date collections show a 14.3% increase, or \$54,448.85.

Q1 County collections reflect a 15.8% increase, or \$18,344. Combined Q1, reflected an 11.65% increase, or \$35,988. Q2 for Town collections shows an increase of 19.57%, or \$36,805. Q2 County shows a 10.64% increase, or \$11,288. Total Q2 collections between town and county shows 16.35% increase, or \$48,093.

The full detailed report is available through google drive:
<https://drive.google.com/drive/folders/1VCvv4F3PFlixRkzwkXxmdAMoVS-9Ksrp?usp=sharing>

BLUE ROOM RESEARCH

The most recent report through Blue Room is in the 2025 data folder on google drive:
<https://drive.google.com/drive/folders/1BhAKSC8LD5zdX2ZogJX1oJK17RSDZm9o?usp=sharing>. The report has been included in the packet. The report does not include July lodging tax until we have more accurate information.

VISITOR CENTER UPDATE

The Visitor Center lobby is open 7 days per week from 10am - 4pm. We aim to be open 362 day a year, closed only on Thanksgiving, Christmas and New Years. Continuous promotion of the app across all channels helps complete the virtual operations. We currently have two part time staff ensuring hours of operation and one very part time filler; Director manages day to day operations and is on call 7 days a week for any issues that arise. We have seen strong app usage.

The recent monthly report in the data folder. Visitor Center staff is actively encouraging visitors to download the app for alert information, parking lot "tour and scavenger hunts.

STAFFING UPDATE

The Tourism Department currently has three (3) full time employees: Director, Marketing Manager and Administrative Assistant, plus 2 part time visitor center employees and one bonus very part time person to help fill in weekends, holidays and summer. All employees report to the Director and the Director oversees all activities, projects and manages visitor center operations. Director is taking on a lot of additional work in order to keep the rest of staff okay. Based on discussions during the joint budget work session, staff is proposing one additional full time employee in 2026 for overall tourism needs.

VISITOR EDUCATION / FIRE UPDATE

The Tourism Department continues to promote Stage 2 restrictions to visitors. Visitors do not know annexation lines and we want to ensure they are aware fire danger is extremely risky. We have all materials ready based on current situation - posters (Visitor Center doors with current restrictions and smaller posters for Stage 2 specifying what is and is not permitted), video PSAs and Thank You Firefighter yard signs as needed. We keep these printed and ready to switch out, so that we can quickly adapt as needed. We are also extremely cognizant of any social media posts from Visit Pagosa Springs during an active fire. The recent moisture has been welcomed, but much more is needed.

CONSTRUCTION PLANNING / MESSAGING

Tourism staff has distributed all of the temporary people moving signs currently in place, with more for parking lots and other high traffic areas. The aluminum pedestrian signs are printed will be installed by other town departments. Staff is ready to adjust temporary signage as road closures are anticipated to change in the next few weeks. Director is presenting to the middle school on Tuesday, September 2nd with CDOT PIO team. The goal is to educate on safe pedestrian access. A future meeting with the elementary school is anticipated. Director continues to work closely with CDOT PIO on anything tourism can assist with during the construction "disruption." Upcoming sign / sidewalk decal movement is anticipated based on project needs. Staff will be ready to assist as needed. Director has been involved in recent requests and meetings with sign stakeholders regarding additional business signage. Additionally, Director is joining CDOT team on Tuesday, September 2nd to speak with the middle school students about construction safety.

SOCIAL MEDIA UPDATE

- Facebook - www.facebook.com/visitpagosasprings: 40,208 followers
- Instagram - www.instagram.com/visitpagosa: 26,893 followers
- Twitter / X - www.twitter.com/visitpagosa - 2,196 followers
- Youtube - www.youtube.com/visitpagosa - 1,570+ subscribers; 683,203 video views
- TikTok @visitpagosa - 3,850 followers, 20.9k likes

All detailed social media data can be reviewed in the google drive by month:

<https://drive.google.com/drive/folders/1U7dqMzDtK4YsLLSVySGWHeQqe1Qb1Fw?usp=sharing>

Paid Meta campaigns currently running include: (1) Stage 2 Fire Restriction PSA (until rescinded), (2) event carousel with events through December, and (3) launching week of 9/1 fall video. Campaigns are being constantly evaluated to maximize results. Blog promotion will begin soon in the paid Meta mix.

RECENT & UPCOMING PROMOTIONS

The 2025 Marketing Plan and advertising schedule can be found at:

<https://drive.google.com/drive/folders/1MjwPBL1yKxFtMoj8sFtWVOWykPWwlqL?usp=sharing>

We currently have ads running through YouTube and Meta through August. In early September, our fall ad campaigns will begin. Youtube ads are seeing 15%+ click through rate and paying \$0.01 - \$0.02 per click. The ad placement schedule has been updated with everything committed thus far. Fall and early winter campaigns have not yet been committed.

Alamosa and Pagosa have begun to work on 2025 CTO grant, to launch late summer / early fall. The 2025 grant focused on international tourism efforts in UK and German-speaking markets. While international travel is down in the US due to many factors out of our control, the UK and German-speaking markets are still booking and traveling. Colorado is typically the 4th visit to the US (NY, FL and CA and National Parks are typically the first few visits). Colorado's international visitors are experienced US travelers and are not as impacted by political changes or other concerns. The most impacted international markets showing strong declines are Canada and Mexico, neither are key international markets for Pagosa.

The sponsored content "template" ad for the Colorado State Vacation Guide is due to the Miles team by the end of September. For the 2026 guide, there are now 4 different templates to consider, versus only 2 in 2025. The CTO has moved the State Vacation Guide away from an ad heavy publication to more of an editorial / advertorial concept over the the last 3 years. Director has negotiated a decrease in cost (\$15k for 2026) and also an extended deadline for the end of September. We were asked to provide materials by September 8th initially.

2026 CTO MARKETING GRANT

For the 2026 CTO marketing grant, the Tourism Board approved the change in direction to focus on domestic and highlighting the 250/150 events. The grant application was submitted on 8/28. The application proposed creating a Southern CO Heritage Trail with Alamosa. The plan is to create storytelling video assets, promote video through CTV and paid Meta efforts. Award notifications are announced in early November. The grant proposal was for the max amount of \$74,000, including a \$12,500 match from each destination. The campaigns will target shared domestic audiences and aligns closely with the State's focus on 250/150 promotions.

PRESS & MEDIA RELATIONS

All media tracking can be found at: https://docs.google.com/spreadsheets/d/1d1pXYOK_IUk6dxSps9b9GRv`NJ2_-4UNh5XLRvzFIs2g/edit?usp=sharing. We have recently hosted quite a few media / trade. We were also recently featured in Forbes: "[Four Awesome Colorado Hot Springs Adventures](#)". This article was the result of the ongoing promotion of the Hot Springs Loop, which Director was a lead in creating 10+ years ago. While we were not asked to host the writer, Pagosa was one of 4 destinations featured. Basically, "free" coverage. Forbes has a potential audience reach of 56M.

DESTINATION BLUEPRINT

Staff continues to work with website vendor on adding Business Resources and Blog feature on website. Director presented to Rotary on August 7th.

SIGNAGE

Director is currently working with various Town departments on new construction signage, river access signage, PARC on their overall signage efforts, post-construction community-wide wayfinding signage (paused in 2019), geothermal building interpretive signage, and more. As much as we would like to get out of the signage business, it does not seem possible.

CERTIFIED PAGOSA PARTNER & TOURISM AMBASSADOR PROGRAM

Director is scheduled to provide training to all of Town staff on September 10th and Wyndham staff will be trained in mid September. We are using 2025 to roll out overall program. One role of a new staff member would be help grow this program.

2026 BUDGET

A draft overall budget will be considered during the September Board meeting. The budget process will continue through November, with work sessions with electeds to drive into each line item. While there was recently a budget provided by the lodging association, the work session held on August 6th with the Tourism Board, members of Town Council and members of the Board of County Commissioners guided staff's recommendations. Much of the budget provided by the lodging association was focused on marketing. Staff will present a more detailed marketing plan in December. The November meeting will review the 2025 visitor audience to help drive 2026 marketing plans. The Tourism Board will review the draft 2026 budget during the September meeting and can hold off on approving it until the October 1st meeting. Staff's goal is to consider all of the requests, needs and direction of the elected officials.

ATTACHMENTS:

[Visit Pagosa Springs - Research Update - July 2025 Review](#)



PAGOSA
SPRINGS
COLORADO

- REFRESHINGLY AUTHENTIC -

Research Insights July 2025 Review

U.S. Market Review



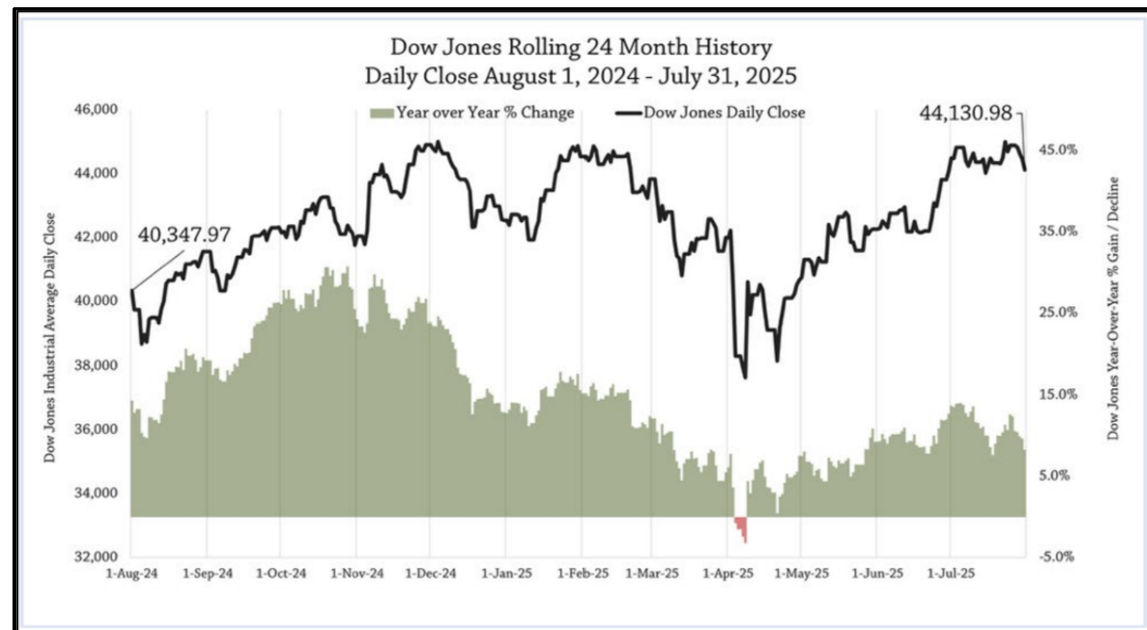
U.S. Market Review



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The Dow Jones Industrial Average

- “The DJIA increased very slightly in July following strong gains in both May and June, with the index climbing just 0.1 percent, or 36.21 points, to finish the month at 44,130.98 points.”
- “Strong corporate earnings and a few trade deals helped bring positivity to the DJIA, while concerns about outstanding trade tensions with some major partners, worries about inflation, and jobs data created dynamic tension that kept both growth and decline in check.”
- “The Dow is currently 8.1 percent – or 3,288.2 points – higher than July 31 last year.”



Source: DestiMetrics (8/12/2025)

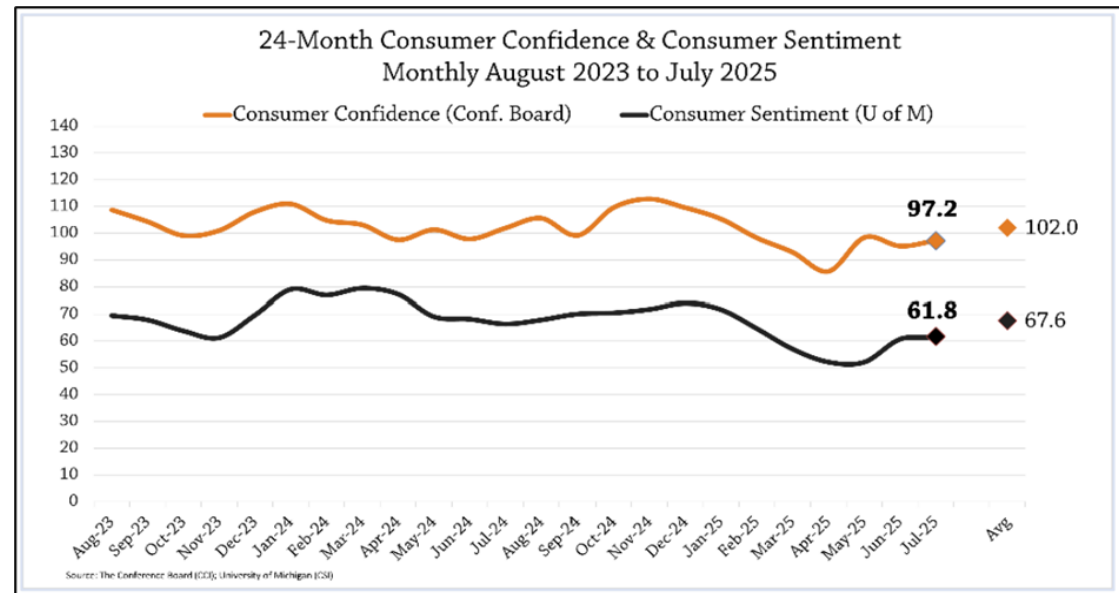
U.S. Market Review



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The Consumer Confidence & Consumer Sentiment Index

- “The CCI and CSI both gained modestly in July, with the CCI continuing to fluctuate between gains and losses while the CSI is on a modest streak. Both remain down sharply from their 12-month highs and 24-month averages.”
- “The Conference Board’s CCI added a modest 2.0 points, or 2.1 percent, and is now at 97.2 points, its highest point since February (98.3 points).”
- “Consumers’ mood was mixed, with a slight improvement in their short-term outlook for income, business, and employment but a modest retreat in their assessment of current conditions.”
- “The CSI from the University of Michigan inched up just a single point in July, but logged its second consecutive gain, and at 61.8 points is also at its highest point since February.”



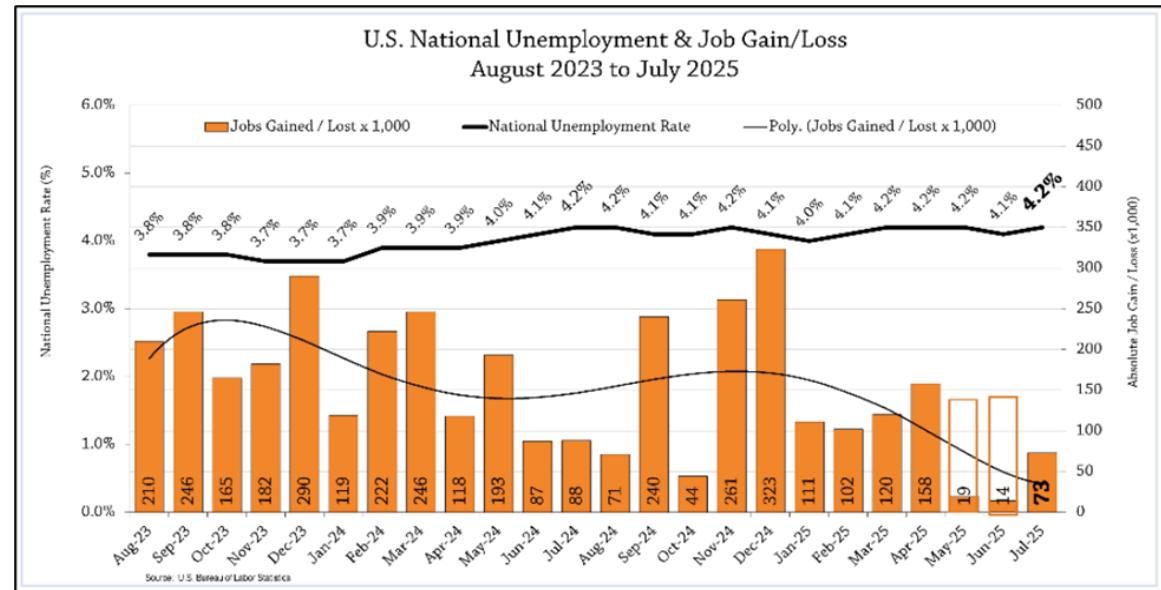
Source: DestiMetrics (8/12/2025)

U.S. Market Review



The National Unemployment Rate

- “Unemployment and Jobs softened considerably in July, and May and June were adjusted sharply downwards, as employers added just 73,000 jobs during the month and the unemployment rate inched up to 4.2 percent.”
- “May was adjusted from 144,000 to just 19,000, and June from 147,000 to 14,000, a total adjustment of 258,000 jobs.”
- “The weaker jobs report is likely an overdue reflection of the impact of trade policy on hiring as employers wait to see what impact both cost and retail price will have on supply and demand and is more closely aligned with the Automatic Data Processing (ADP) jobs data.”
- “The weaker jobs data likely guarantees an interest rate cut from the Federal Reserve Bank in September and perhaps another in December.”



Source: DestiMetrics (8/12/2025)

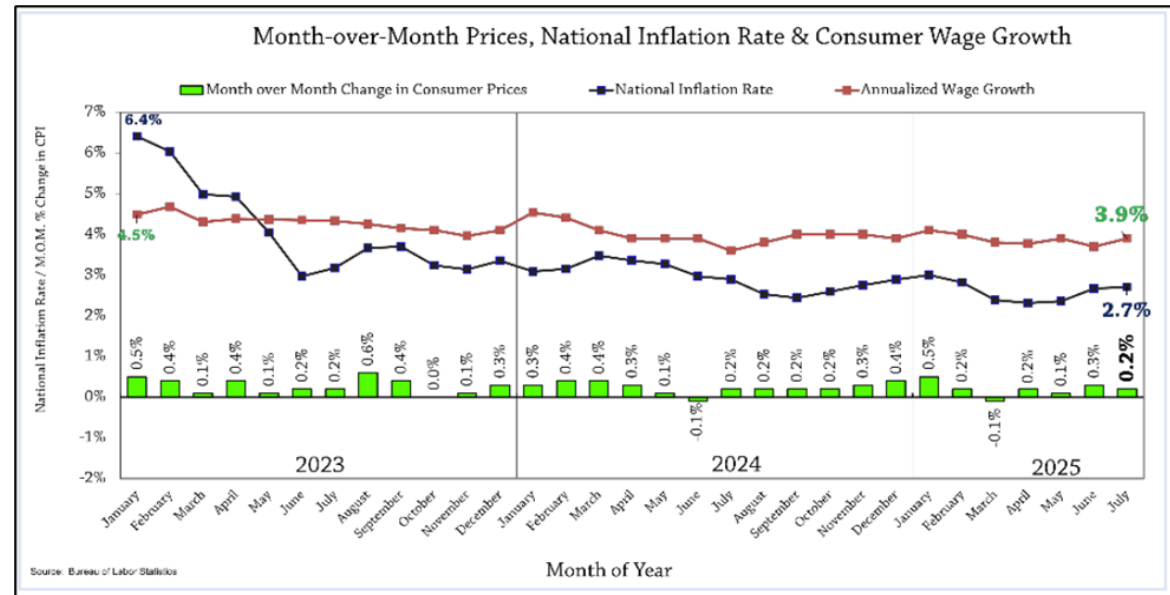
U.S. Market Review



- REFRESHINGLY AUTHENTIC -

The National Inflation Rate

- “In a highly anticipated report, the national inflation rate was steady at 2.7 percent, up from 2.3 percent in April and just slightly above the 2.6 percent 12-month average.”
- “However, core inflation, which strips out the volatile energy and food categories, was considerably higher, up 3.1 percent from last year, and up 0.3 percent from last month.”
- “Despite the increase in core inflation, there is some good news in this month’s report, including the increase in annual wage growth compared to inflation, with wages up 3.9 percent compared to the 2.7 percent national inflation rate, and even up versus the 3.1 percent core inflation rate.”
- “The higher rate is not likely enough to deter the Federal Reserve Bank from their plans to cut interest rates in September.”



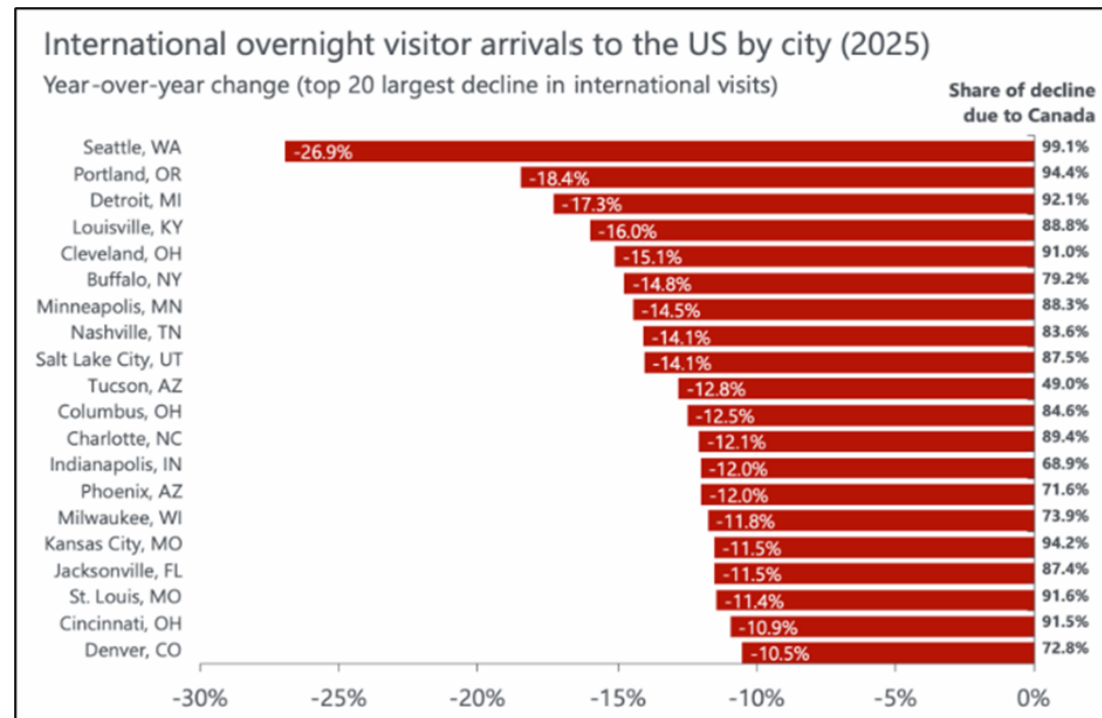
Source: DestiMetrics (8/12/2025)

U.S. Market Review



International Overnight Arrivals

- “Recent data releases through June confirm our forecast of an 8.2% decline in international overnight arrivals to the US for 2025, as sentiment headwinds persist.”
- “The fallout from Canada has been steepest, as land crossings and air arrivals contracted 28.0% and 13.3% year-to-date (YTD), respectively.”
- “The pullback in Canadian travel is expected to most negatively impact cities such as Seattle (-26.9% fall in overnight international visitors expected in 2025), Portland (-18.3%), and Detroit (-17.3%).”
- “Overseas arrivals fell 3.4% in June compared to a year ago, bringing the YTD decline to 1.2%. Among key markets, visitors from Ecuador, South Korea, Germany, and France have fallen the most. Strength in Argentina, Italy, and some Asian countries is partly offsetting the declines.”
- “The contraction in international arrivals is most acute in cities highly dependent on Canadian travel, particularly those closer to the northern border. For 2025, we forecast the steepest year-over-year declines will occur in Seattle, Portland, and Detroit.”



Source: *Tourism Economics* (7/22/2025)

U.S. Market Review



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Visa Integrity Fee

- “On July 4, 2025, H.R.1, the One Big Beautiful Bill Act (“OBBBA”), was signed into law. It outlines a new Visa Integrity Fee that will affect individuals who need to secure a visa at a U.S. embassy or consulate outside the United States.”
- “Beginning on October 1, 2025, a \$250 Visa Integrity Fee will be imposed on foreign nationals applying for non-immigrant visas.”
- “The fee is intended to address visa over-stays. By providing an incentive to receive the fee back after complying with the terms of the visa, the government aims to reduce non-compliance by foreign nationals. It remains unclear how the amount will be credited back to applicants.”
- “The fee does not apply to individuals who are visa-exempt, such as Canadian nationals or nationals of Visa Waiver Program (VWP) countries who are required to apply for Electronic System for Travel Authorization (ESTA).”

Source: KPMG (7/25/2025)

U.S. Market Review



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U.S. Hotel Growth Forecast

- “CoStar and Tourism Economics further downgraded growth projections in a revised 2025-26 U.S. hotel forecast.”
- “Given continued underperformance and elevated macroeconomic concerns, forecasted growth rates were lowered across the top-line metrics: demand (-0.6ppts), ADR (-0.5 ppts) and RevPAR (-1.1 ppts).”
- “Similar adjustments were made for 2026: demand (-0.5 ppts), ADR (-0.3 ppts) and RevPAR (-0.7 ppts).”

U.S. Hotel Forecast

YoY – year over year (% change)

	2024 Actual	2025 Forecast	2026 Forecast
Supply (YoY)	+0.5%	+0.8%	+0.8%
Demand (YoY)	+0.5%	-0.1%	+0.6%
Occupancy	63.0%	62.5%	62.3%
ADR (YoY)	+1.8%	+0.8%	+1.0%
RevPAR (YoY)	+1.9%	-0.1%	+0.8%

Source: STR (8/7/2025)

U.S. Market Review



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Short Term Rentals Update July 2025

- “Demand growth rebounded in July, rising to 3.6% year-over-year — up from 2.7% in June. While still below the pace seen in summer 2024, the increase was enough to set a new monthly record for the U.S. STR market, with 26.4 million demand nights.”
- “Bookings made in July were up just 0.7% YoY, reflecting a slight slowdown in forward momentum compared to June. Still, that’s an improvement over May, which saw a mild year-over-year decline.”
- “Notably, the timing of Independence Day (falling on a Friday) drove a spike in demand for early July, with many reservations made in June. As a result, fewer July bookings were captured during the month itself, slightly skewing the month-on-month booking growth comparison.”
- “Occupancy has remained slightly lower than in 2024 throughout the summer, largely due to softer demand rather than rapid supply expansion. In July, occupancy fell 1.0% YoY—a continuation of the trend seen since May. However, strong performance earlier in the year (notably January and April) has kept 2025 occupancy ahead of 2024 on a year-to-date basis.”

Source: AirDNA (8/19/2025)

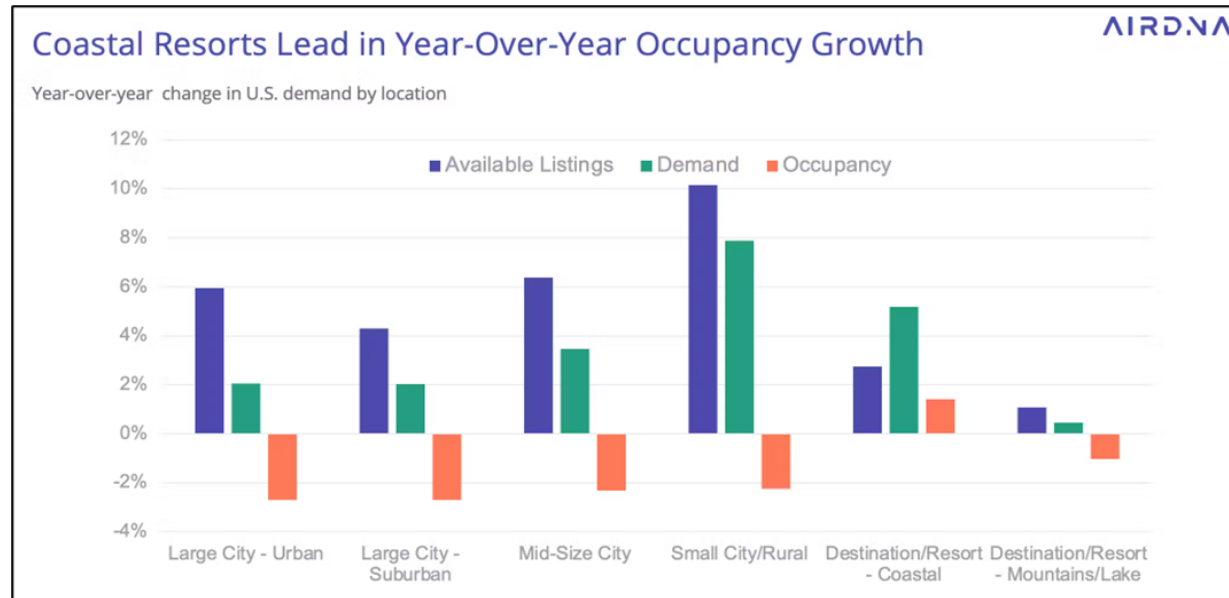
U.S. Market Review



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Short Term Rentals Update July 2025 (continued)

- “Among location types, coastal resorts led occupancy growth with a 1.4% YoY increase—driven by strong demand and relatively flat supply. Mountain resorts saw the second-highest change, but in the opposite direction: demand and supply both declined, resulting in a 1.0% drop in occupancy. Large suburban and urban markets posted the weakest results, each seeing occupancy fall by 2.7% YoY.”



Source: AirDNA (8/19/2025)

U.S. Market Review



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Short Term Rentals Update July 2025 (continued)

- “Average daily rate (ADR) growth remained strong in July, holding at +6.9% year-over-year after three months of acceleration.”
- “A key driver of this trend may be the growing interest in larger homes. Since February, demand for 6+ bedroom properties has grown more than 13 times faster than for single-bedroom listings, and about four times faster than for two-bedroom homes.”
- “While summer occupancy remains slightly below 2024 levels, higher nightly rates have more than compensated, pushing RevPAR up 5.7% YoY across the U.S.”

Key U.S. Short Term Rental Performance Metrics for July 2025

- Available listings reached 1.77 million, a 4.5% increase year-over-year
- Demand nights rose 3.6% compared to July 2024
- Occupancy averaged 67.4%, down 1.1% year-over-year
- Average Daily Rates (ADR) climbed to \$351.67, up 6.9% from last year
- Revenue per Available Rental (RevPAR) increased 5.7% year-over-year (YOY) to \$237.06

Source: AirDNA (8/19/2025)

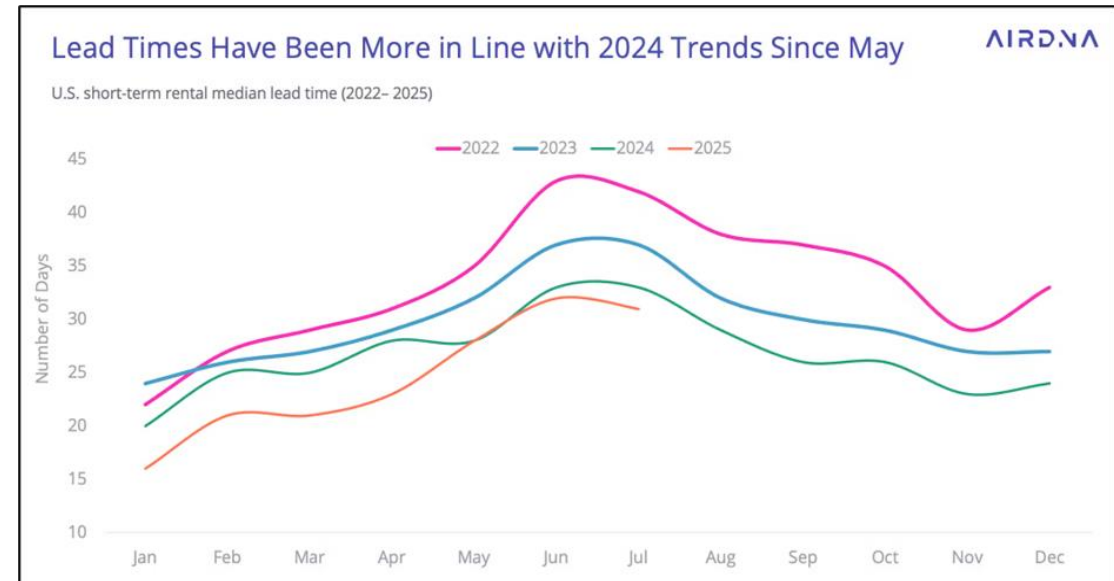
U.S. Market Review



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Short Term Rentals Update July 2025 – Pacing Deep Dive

- “Over the past year, shorter lead times have made pacing data less reliable as a predictor of future demand. Bookings have increasingly skewed toward very short notice, or, in the case of some luxury properties, unusually long lead times, making it harder to interpret pacing trends.”
- “However, recent months suggest a modest return to stability. In May, the median lead time matched the previous year at 28 days, narrowing what had been a 4–5 day gap earlier in the year. Lead times in June and July remained slightly shorter year-over-year (but by only one and two days, respectively), indicating a more consistent booking pattern than earlier in 2025.”



Source: AirDNA (8/19/2025)

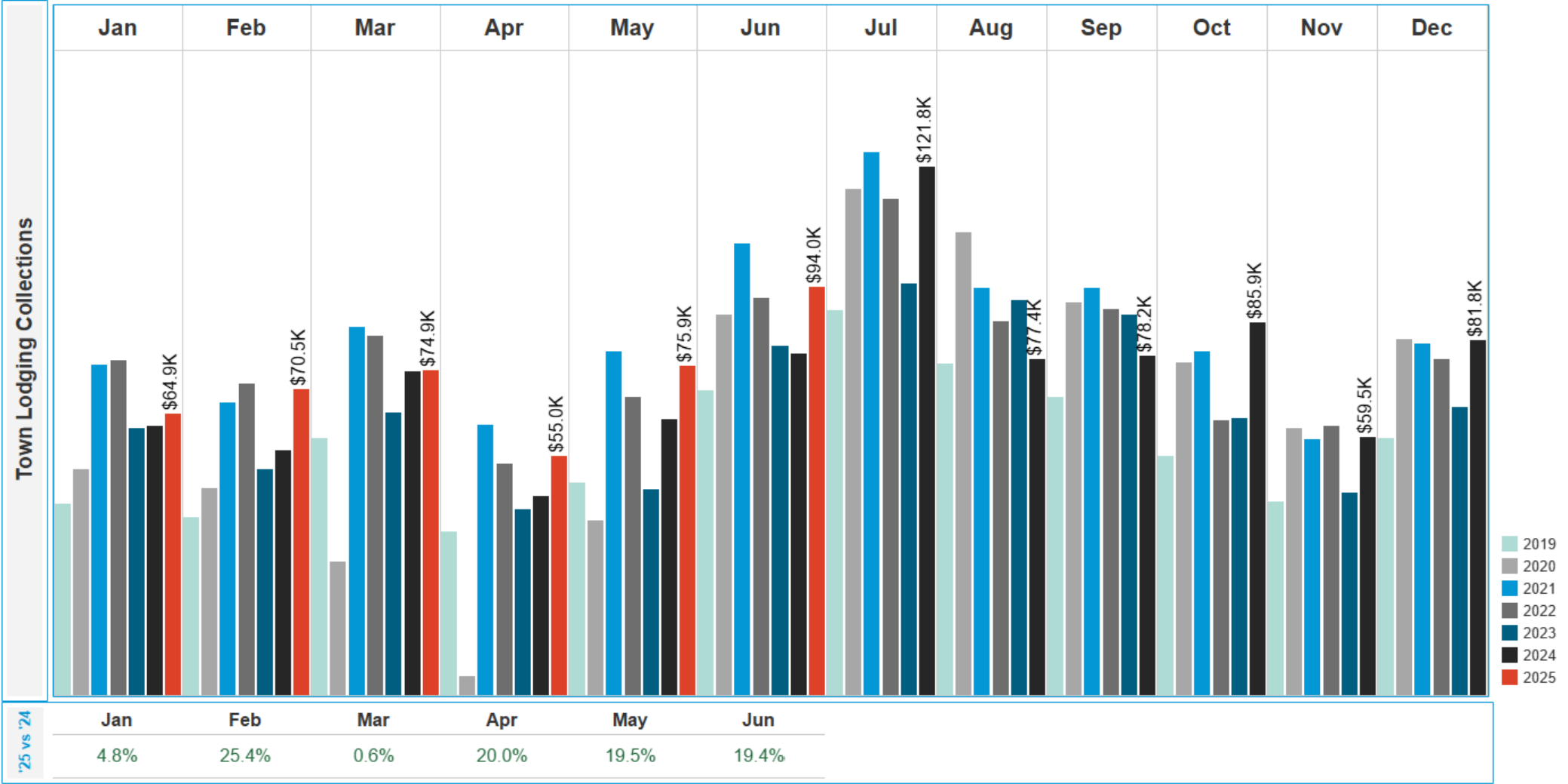
Lodging Tax Collections



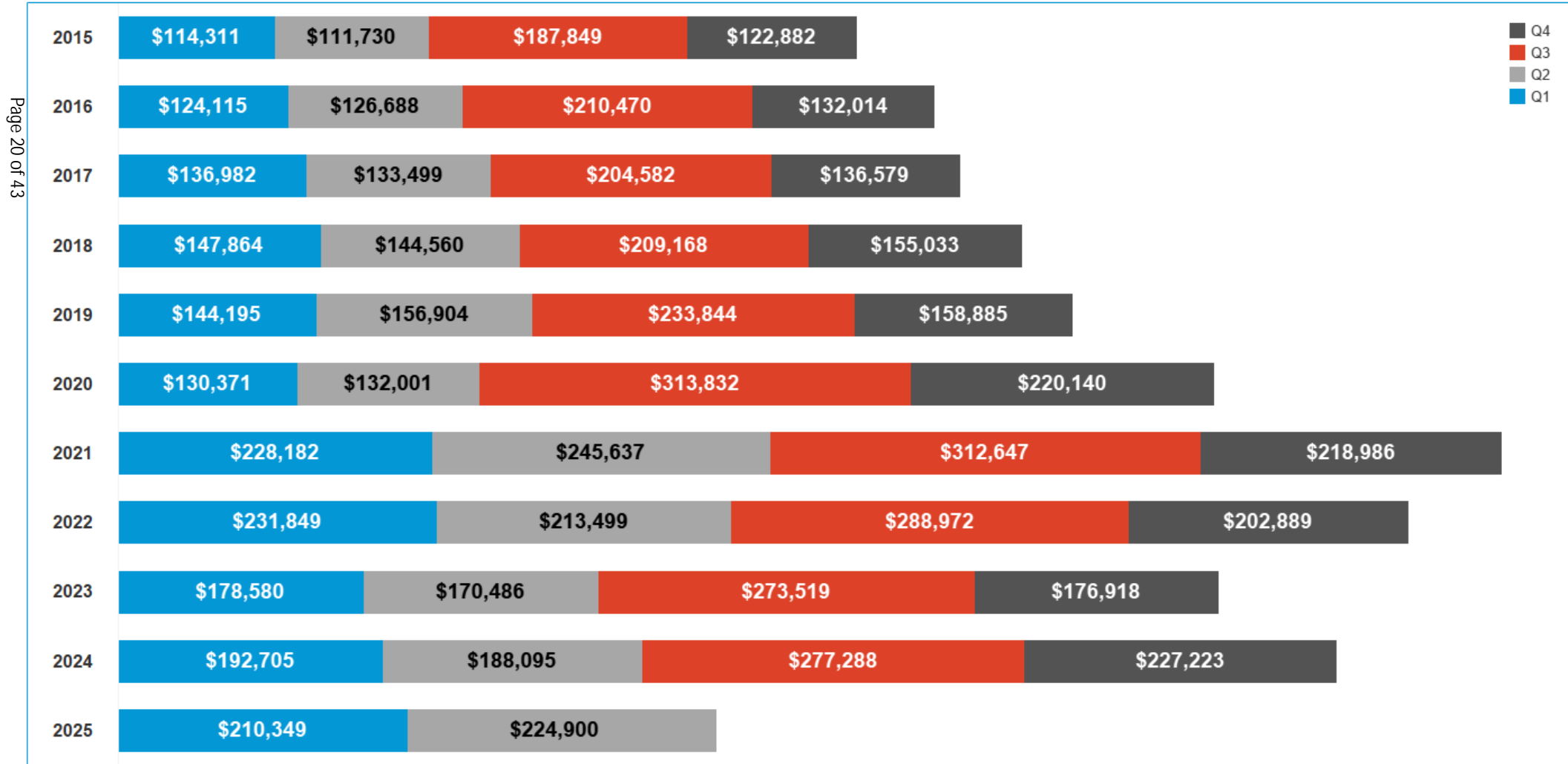
Pagosa Springs Monthly Lodging Tax Collections Town Collections Through June 2025



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Pagosa Springs Monthly Lodging Tax Collections Town Collections Through June 2025



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Pagosa Springs Monthly Lodging Tax Collections

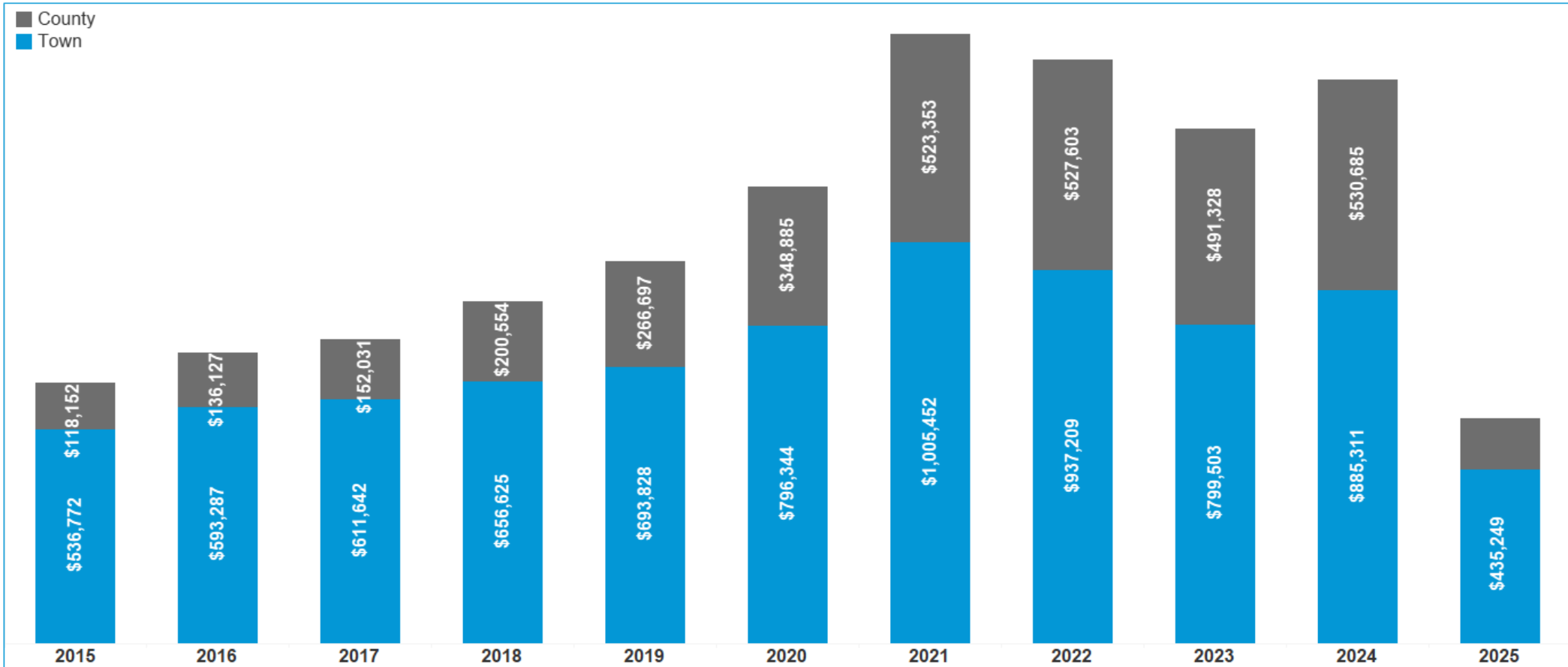
Total Collections Through June 2025



Note: County collections are reported quarterly.

2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025
\$654,924	\$729,414	\$763,673	\$857,179	\$960,525	\$1,145,229	\$1,528,805	\$1,464,812	\$1,290,831	\$1,415,996	\$565,671

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Pagosa Springs Quarterly Lodging Tax Collections

Total Collections Through June 2025

Note: County collections are reported quarterly.



		2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025
Q1	County	\$25,952	\$18,416	\$35,792	\$29,030	\$46,261	\$57,791	\$128,910	\$127,543	\$125,829	\$116,111	\$130,422
	Town	\$114,311	\$124,115	\$136,982	\$147,864	\$144,195	\$130,371	\$228,182	\$231,849	\$178,580	\$192,705	\$210,349
	Total	\$140,263	\$142,531	\$172,774	\$176,894	\$190,456	\$188,162	\$357,092	\$359,392	\$304,409	\$308,816	\$340,771
Q2	County	\$16,326	\$33,172	\$29,896	\$56,080	\$45,483	\$52,809	\$115,041	\$129,385	\$90,666	\$106,066	
	Town	\$111,730	\$126,688	\$133,499	\$144,560	\$156,904	\$132,001	\$245,637	\$213,499	\$170,486	\$188,095	\$224,900
	Total	\$128,056	\$159,860	\$163,395	\$200,640	\$202,387	\$184,810	\$360,678	\$342,884	\$261,152	\$294,161	\$224,900
Q3	County	\$47,765	\$47,929	\$49,470	\$65,609	\$93,349	\$136,452	\$166,440	\$158,901	\$155,889	\$158,877	
	Town	\$187,849	\$210,470	\$204,582	\$209,168	\$233,844	\$313,832	\$312,647	\$288,972	\$273,519	\$277,288	
	Total	\$235,614	\$258,399	\$254,052	\$274,777	\$327,193	\$450,284	\$479,087	\$447,873	\$429,408	\$436,165	
Q4	County	\$28,109	\$36,610	\$36,873	\$49,835	\$81,604	\$101,833	\$112,962	\$111,774	\$118,944	\$149,631	
	Town	\$122,882	\$132,014	\$136,579	\$155,033	\$158,885	\$220,140	\$218,986	\$202,889	\$176,918	\$227,223	
	Total	\$150,991	\$168,624	\$173,452	\$204,868	\$240,489	\$321,973	\$331,948	\$314,663	\$295,862	\$376,854	
Grand Total		\$654,924	\$729,414	\$763,673	\$857,179	\$960,525	\$1,145,229	\$1,528,805	\$1,464,812	\$1,290,831	\$1,415,996	\$565,671

Sales Tax Collections

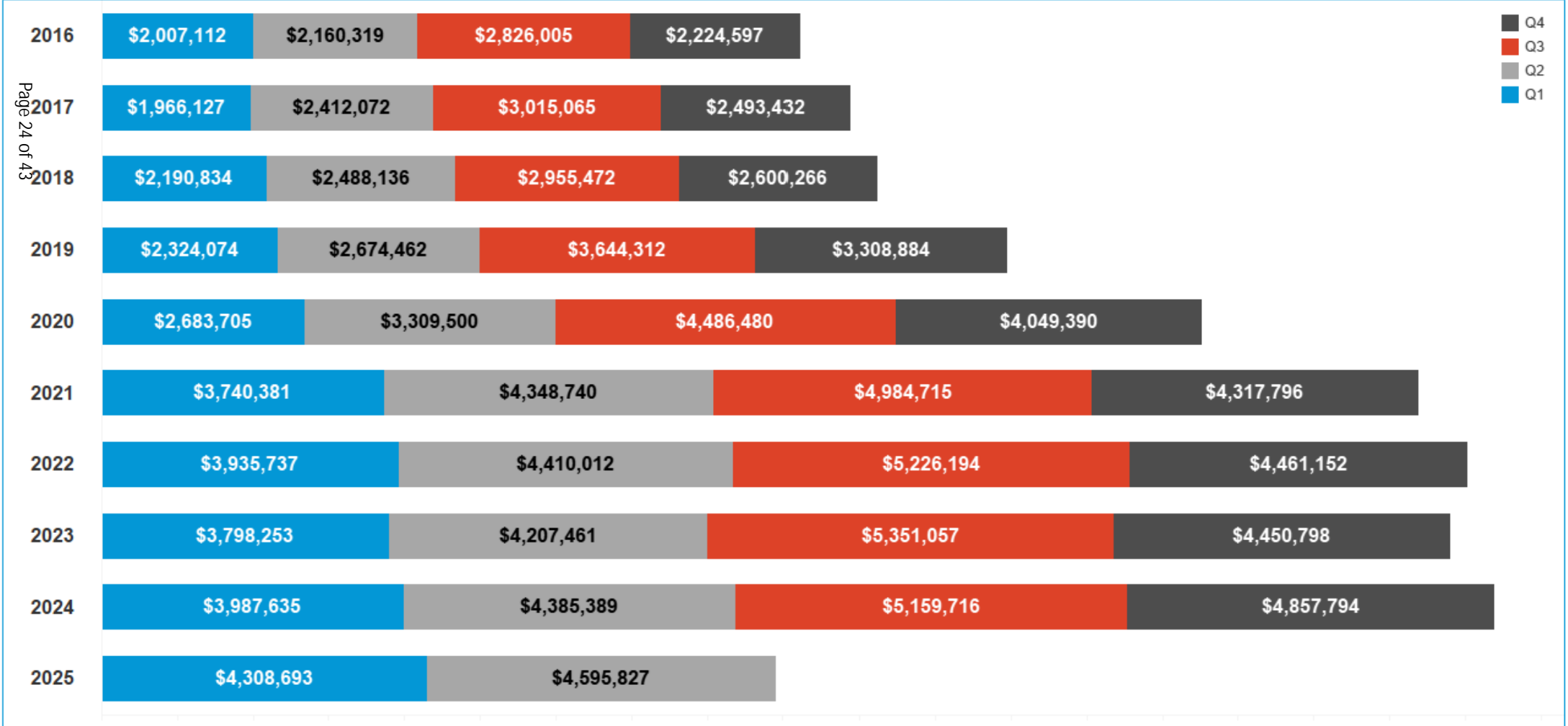
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REPORTS TO BOARD IV.2.

Pagosa Springs Quarterly Sales Tax Collections

Collections Through June 2025



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Pagosa Springs Quarterly Sales Tax Collections Collections Through June 2025

	Jan	Feb	Mar	Q1 Total	Apr	May	Jun	Q2 Total	Jul	Aug	Sep	Q3 Total	Oct	Nov	Dec	Q4 Total		
2016	\$630,442	\$600,885	\$775,785	\$2,007,112	\$582,924	\$639,544	\$937,851	\$2,160,319	\$970,231	\$991,688	\$864,087	\$2,826,005	\$698,521	\$667,832	\$858,244	\$2,224,597		
2017	\$602,618	\$614,496	\$749,013	\$1,966,127	\$654,961	\$766,390	\$990,721	\$2,412,072	\$1,050,936	\$1,034,538	\$929,591	\$3,015,065	\$802,192	\$735,197	\$956,044	\$2,493,432		
2018	\$720,250	\$653,308	\$817,277	\$2,190,834	\$685,584	\$778,029	\$1,024,523	\$2,488,136	\$1,055,648	\$975,397	\$924,427	\$2,955,472	\$894,585	\$760,714	\$944,967	\$2,600,266		
2019	\$748,135	\$705,628	\$870,311	\$2,324,074	\$722,725	\$847,452	\$1,104,285	\$2,674,462	\$1,330,750	\$1,156,262	\$1,157,300	\$3,644,312	\$1,160,328	\$966,585	\$1,181,971	\$3,308,884		
2020	\$893,260	\$861,387	\$929,059	\$2,683,705	\$881,784	\$1,029,961	\$1,397,755	\$3,309,500	\$1,478,390	\$1,414,702	\$1,593,388	\$4,486,480	\$1,351,716	\$1,210,111	\$1,487,563	\$4,049,390		
2021	\$1,230,886	\$1,118,790	\$1,390,705	\$3,740,381	\$1,243,257	\$1,382,546	\$1,722,937	\$4,348,740	\$1,744,911	\$1,544,973	\$1,694,832	\$4,984,715	\$1,389,189	\$1,328,089	\$1,600,518	\$4,317,796		
2022	\$1,285,659	\$1,224,286	\$1,425,792	\$3,935,737	\$1,265,285	\$1,428,491	\$1,716,237	\$4,410,012	\$1,831,470	\$1,793,418	\$1,601,307	\$5,226,194	\$1,425,011	\$1,430,027	\$1,606,114	\$4,461,152		
2023	\$1,271,275	\$1,186,669	\$1,340,310	\$3,798,253	\$1,155,340	\$1,376,511	\$1,675,610	\$4,207,461	\$1,846,753	\$1,867,837	\$1,636,468	\$5,351,057	\$1,518,791	\$1,391,273	\$1,540,735	\$4,450,798		
2024	\$1,338,250	\$1,230,171	\$1,419,214	\$3,987,635	\$1,261,412	\$1,433,936	\$1,690,041	\$4,385,389	\$1,855,193	\$1,655,248	\$1,649,275	\$5,159,716	\$1,718,686	\$1,434,372	\$1,704,736	\$4,857,794		
2025	\$1,405,815	\$1,364,117	\$1,538,761	\$4,308,693	\$1,370,948	\$1,469,254	\$1,755,625	\$4,595,827										
YOY Change					YOY Change					YOY Change					YOY Change			
2022	4%	9%	3%	5%	2%	3%	0%	1%	5%	16%	-6%	5%	3%	8%	0%	3%		
2023	-1%	-3%	-6%	-3%	-9%	-4%	-2%	-5%	1%	4%	2%	2%	7%	-3%	-4%	0%		
2024	5%	4%	6%	5%	9%	4%	1%	4%	0%	-11%	1%	-4%	13%	3%	11%	9%		
2025	5%	11%	8%	8%	9%	2%	4%	5%										

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Short-Term Rental Performance (Airbnb & Vrbo)



AirDNA - Definitions



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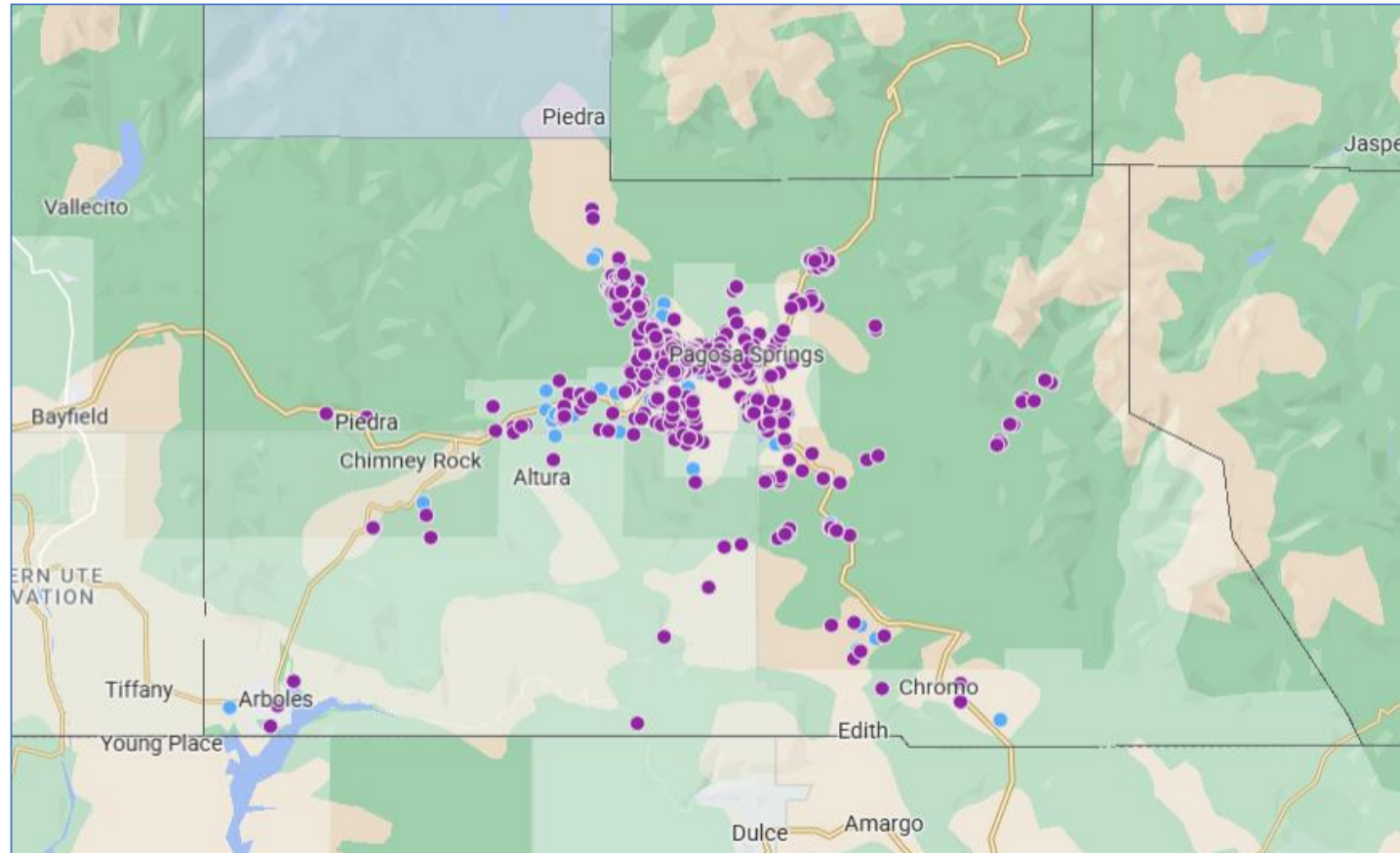
- **Active Listings** – Total number of listings whose calendars had at least one day classified as available or reserved during the reporting period.
- **Average Daily Rate** – Average daily rate (ADR) of booked nights in USD ($ADR = \text{Total Revenue} / \text{Booked Nights}$).
- **Demand (Listing Days Booked)** – Total number of days booked during the reporting period.
- **Supply (Listing Days Available)** – Total number of days available during the reporting period.
- **Occupancy Rate** – $\text{Occupancy Rate} = \text{Total Booked Days} / (\text{Total Booked Days} + \text{Total Available Days})$. The calculation only includes vacation rentals with at least one Booked Night.
- **Revenue (USD)** – Total revenue (in US dollars) earned during the reporting period. Includes the advertised price from the time of booking, as well as cleaning fees.
- **RevPAR** – $\text{Revenue Per Available Rental} = ADR * \text{Occupancy Rate}$

Source: AirDNA

AirDNA Geographical Boundary



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Source: AirDNA

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Pagosa Springs Monthly Short-Term Rental Performance

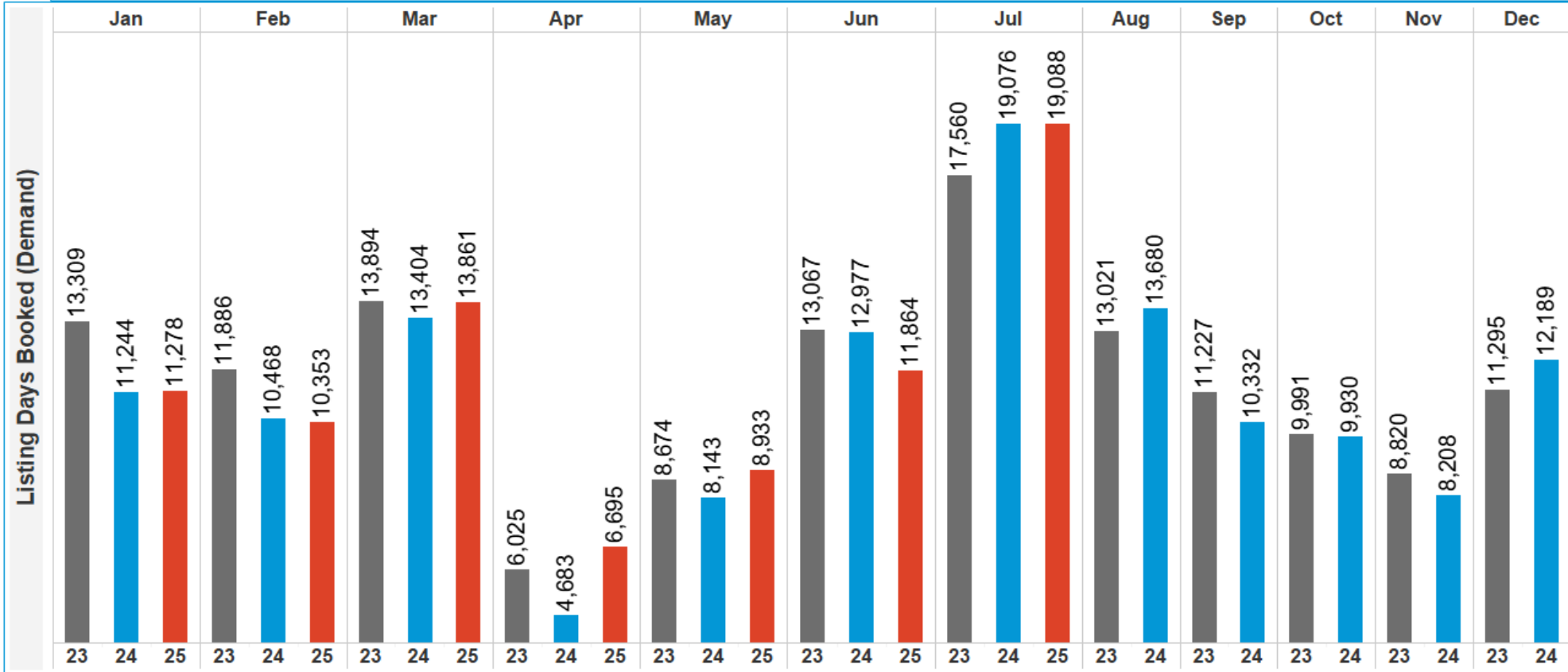
July 2025



Source: AirDNA, 'Entire Place' Listings Only

YOY	Occupancy	ADR	RevPAR	Active Listings	Listing Days Booked	Revenue
Jul '25	75.8%	\$296.64	\$224.89	1,004	19,088	\$5,662,264
	1.8%	4.2%	6.1%	-3.5%	0.1%	4.3%

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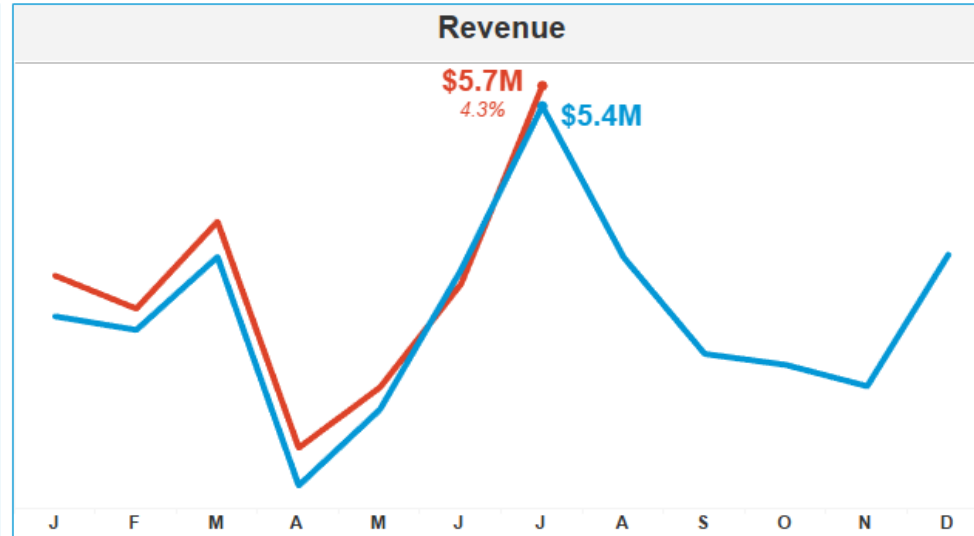
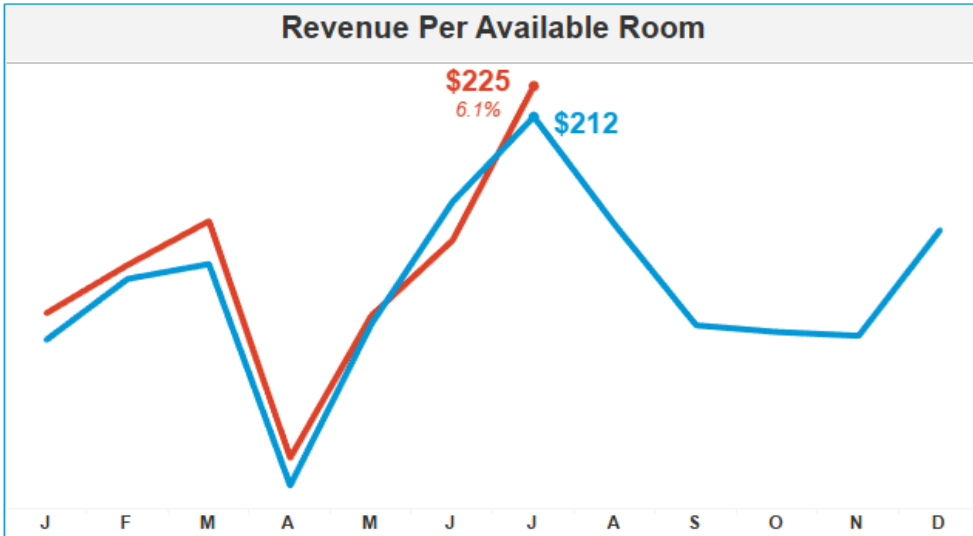
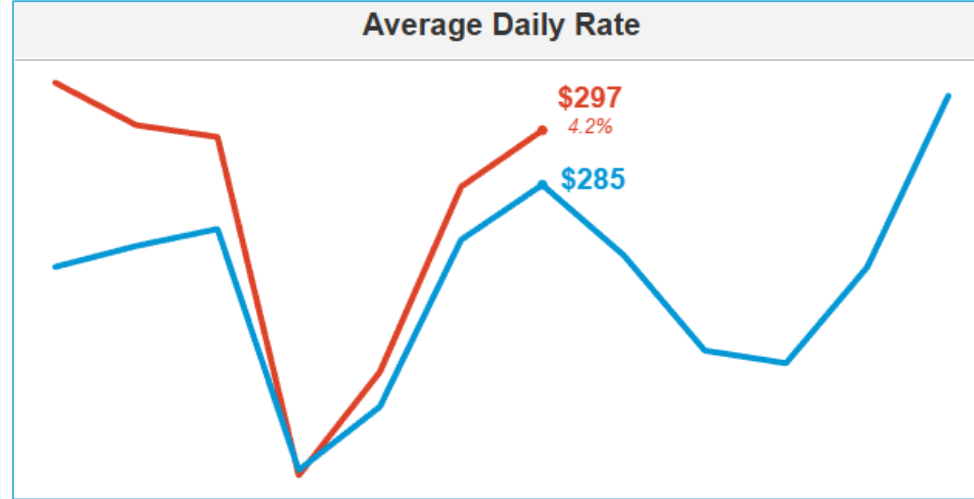
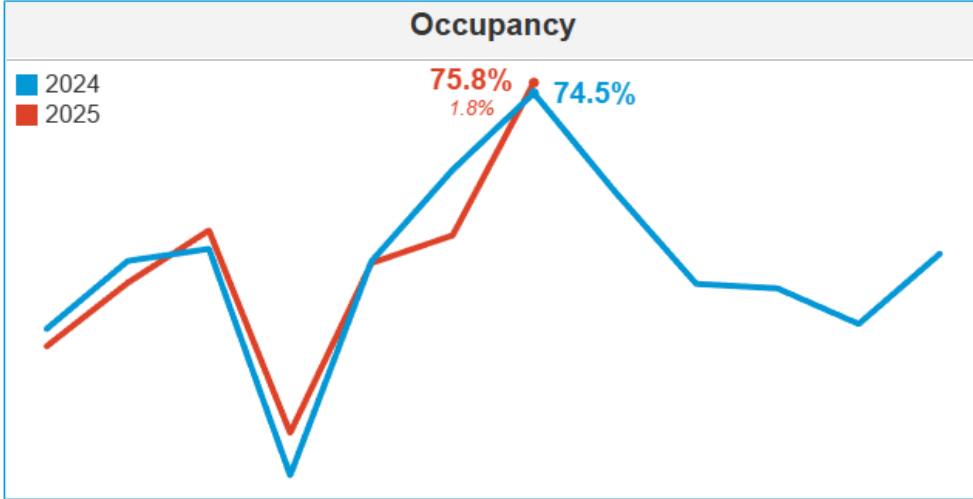
Pagosa Springs Monthly Short-Term Rental Performance

July 2025

Source: AirDNA, 'Entire Place' Listings Only



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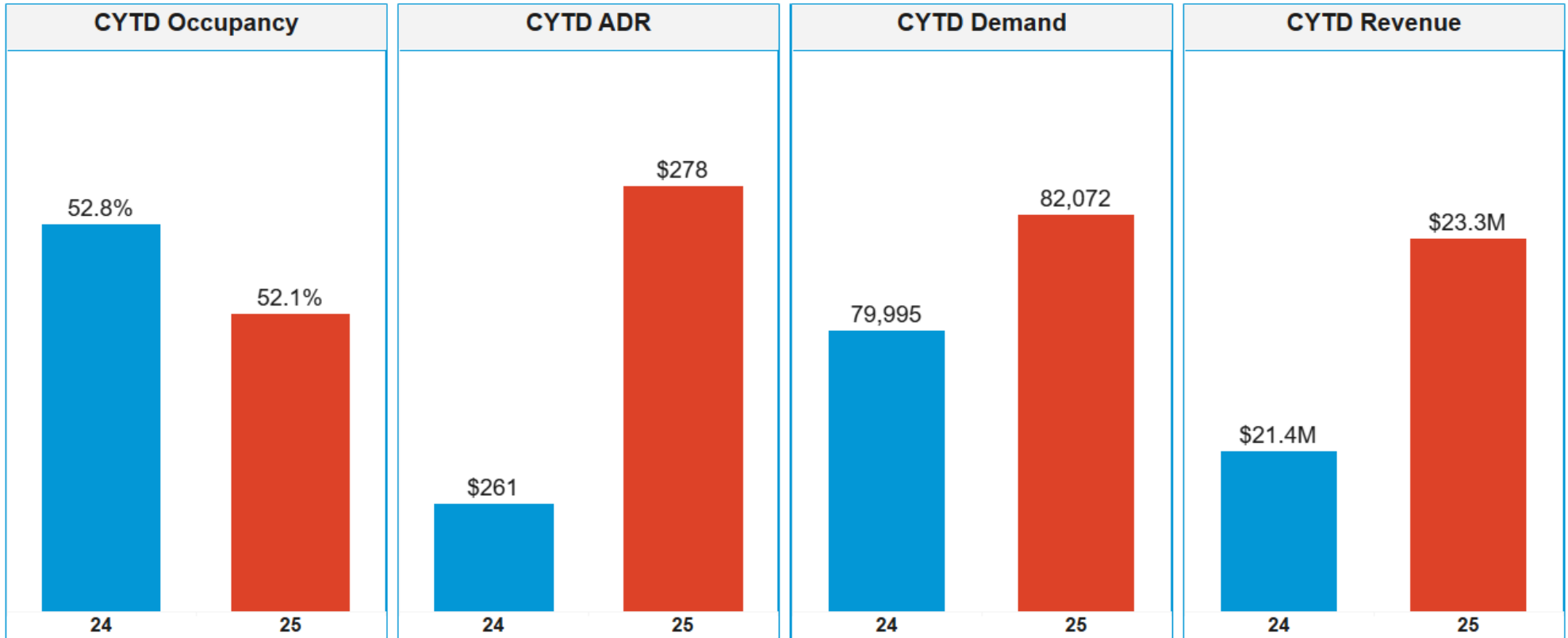


Pagosa Springs Monthly Short-Term Rental Performance

Calendar YTD Through July 2025

Source: AirDNA, 'Entire Place' Listings Only

	Occupancy	ADR	RevPAR	Avg. Active Listings	Listing Days Booked	Revenue
YTD '25	52.1%	\$277.72	\$146.77	934	82,072	\$23,316,732
YOY	-1.2%	6.5%	4.8%	3.4%	2.6%	8.8%



Social Media Performance

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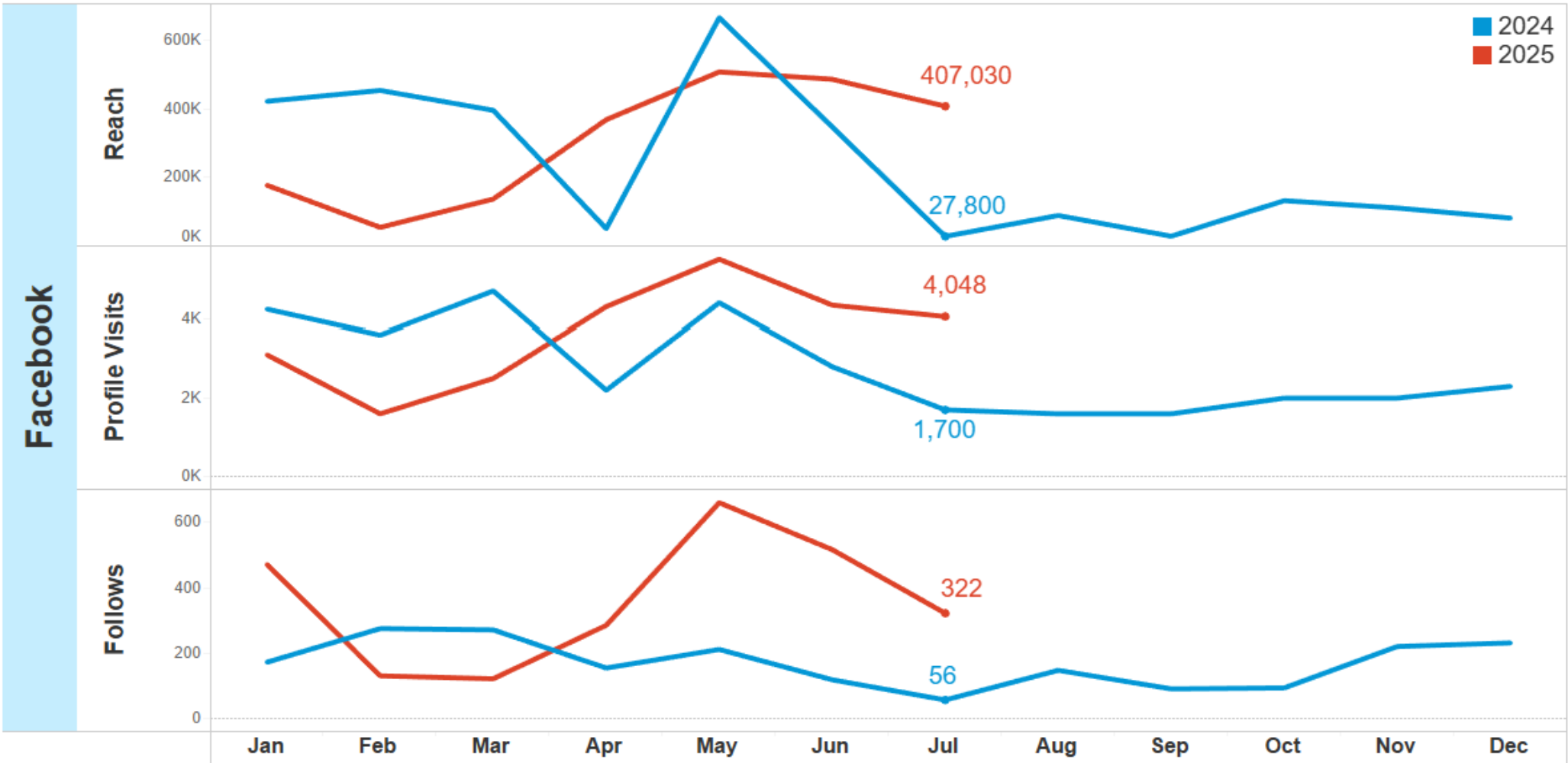


REPORTS TO BOARD IV.2.

Pagosa Springs Monthly Social Media Performance Through July 2025

Source: Meta

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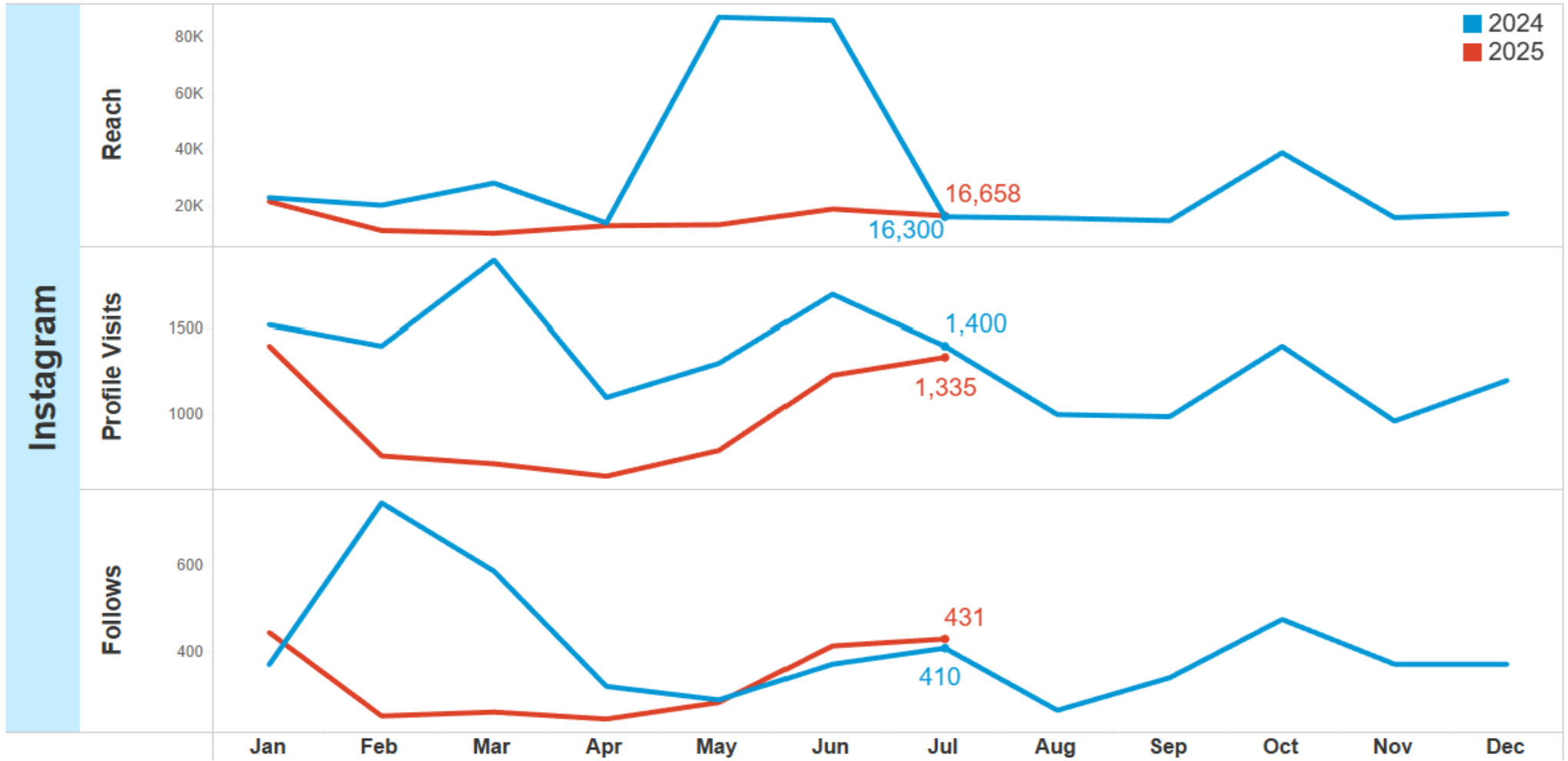


Facebook

Pagosa Springs Monthly Social Media Performance Through July 2025

Source: Meta

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Instagram

Reach

Profile Visits

Follows

Jan

Feb

Mar

Apr

May

Jun

Jul

Aug

Sep

Oct

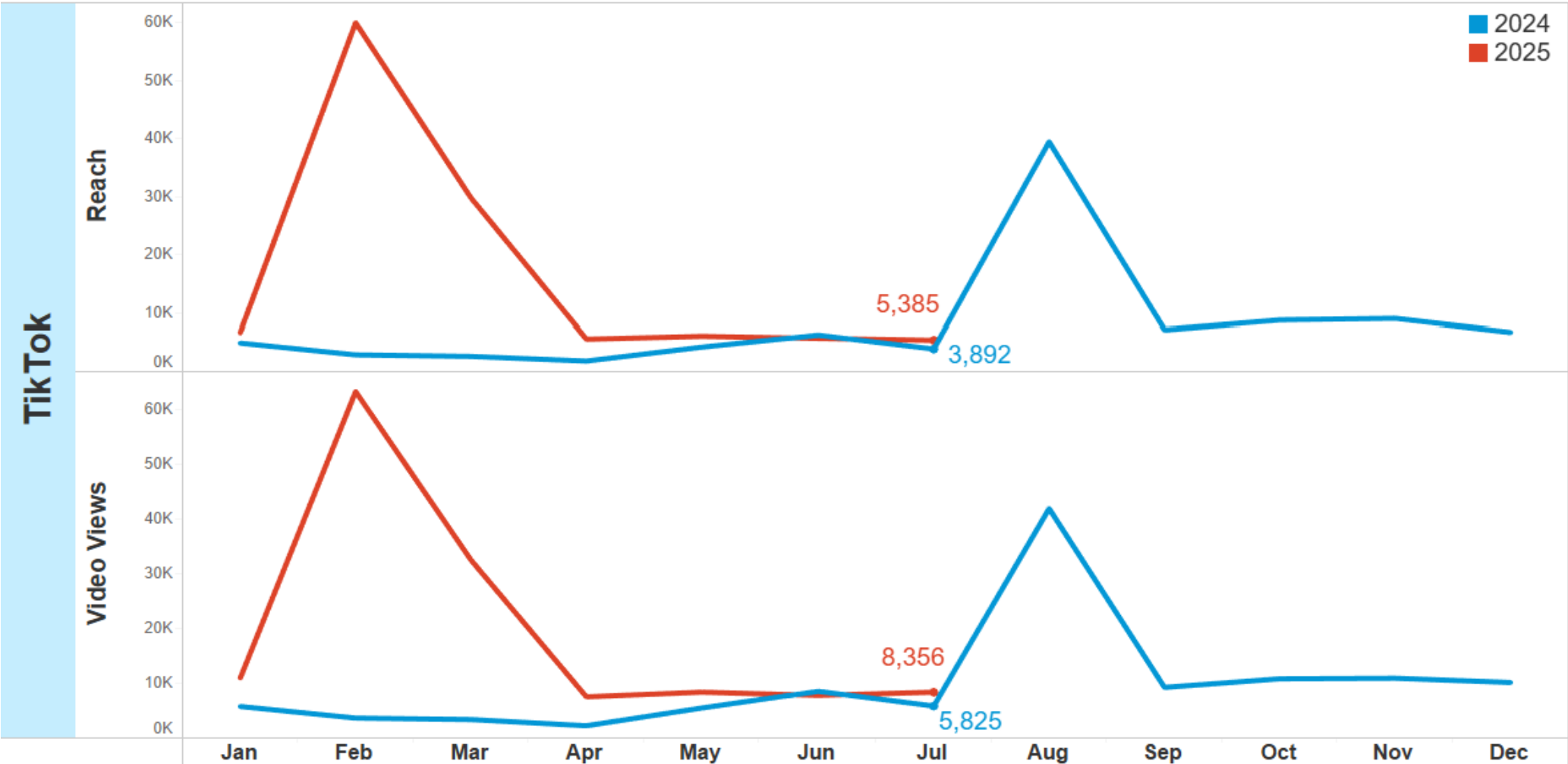
Nov

Dec

Pagosa Springs Monthly Social Media Performance Through July 2025

Source: Tiktok

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TikTok

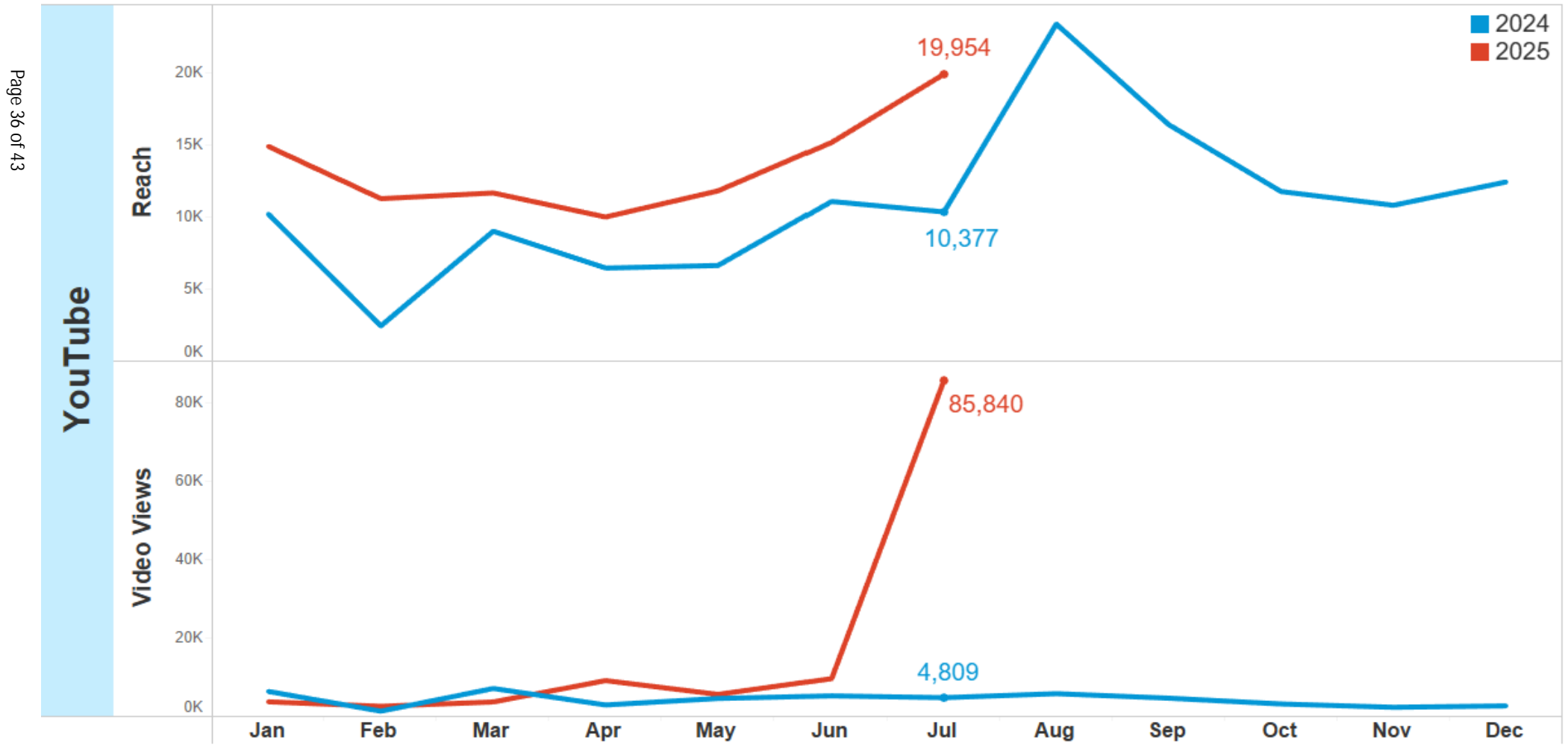
Reach

Video Views

2024
2025

Pagosa Springs Monthly Social Media Performance Through July 2025

Source: YouTube



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YouTube

Consumer Sentiment

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American Travel Sentiment Study Wave 98



*Survey fielded July 1, 2025; US National Sample of 1,000 adults 18+

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American Travel Sentiment Wave 98 Highlights

Key Findings:

- 1. Concerns About Gas Prices Return to Previous Levels**
Concerns about gas prices were at a low in June 2025 with 17% of travelers indicating it was greatly impacting their travel decisions. It has since returned to previous levels with a six-point increase in July 2025 (23%). Despite fuel prices remaining lower than last summer, this is likely due to the overall impact of inflation and personal financial concerns.
- 2. Half of Travelers Have Spent At Least One Night Following a Touring Route**
Half (56%) of travelers have spent at least one night following a touring route or scenic/historic highway in the last five years. A quarter (25%) of travelers followed a touring route once and three in ten (31%) have done so multiple times.
- 3. Majority of Travelers Used Their Personal Vehicle on a Touring Route**
Seven in ten (68%) travelers who have spent time following a touring route used their own car/truck on the route. About one third (35%) used a rental car.
- 4. Dining, Outdoor Scenery, and Historical Sites/Attractions are Top Interests on Touring Routes**
The top three interests while on touring routes are great local restaurants, cafes and dining (40%); wonderful outdoor scenery (40%); and historical sites/attractions (36%).
- 5. A Third of Travelers are Extremely Interested in Touring Route 66**
With Route 66's 100th year anniversary coming up, a third (33%) of travelers are extremely interested in touring all or part of Route 66 at some point.

Source: Longwoods International ATS Wave 98



Longwoods | miles
INTERNATIONAL PARTNERSHIP

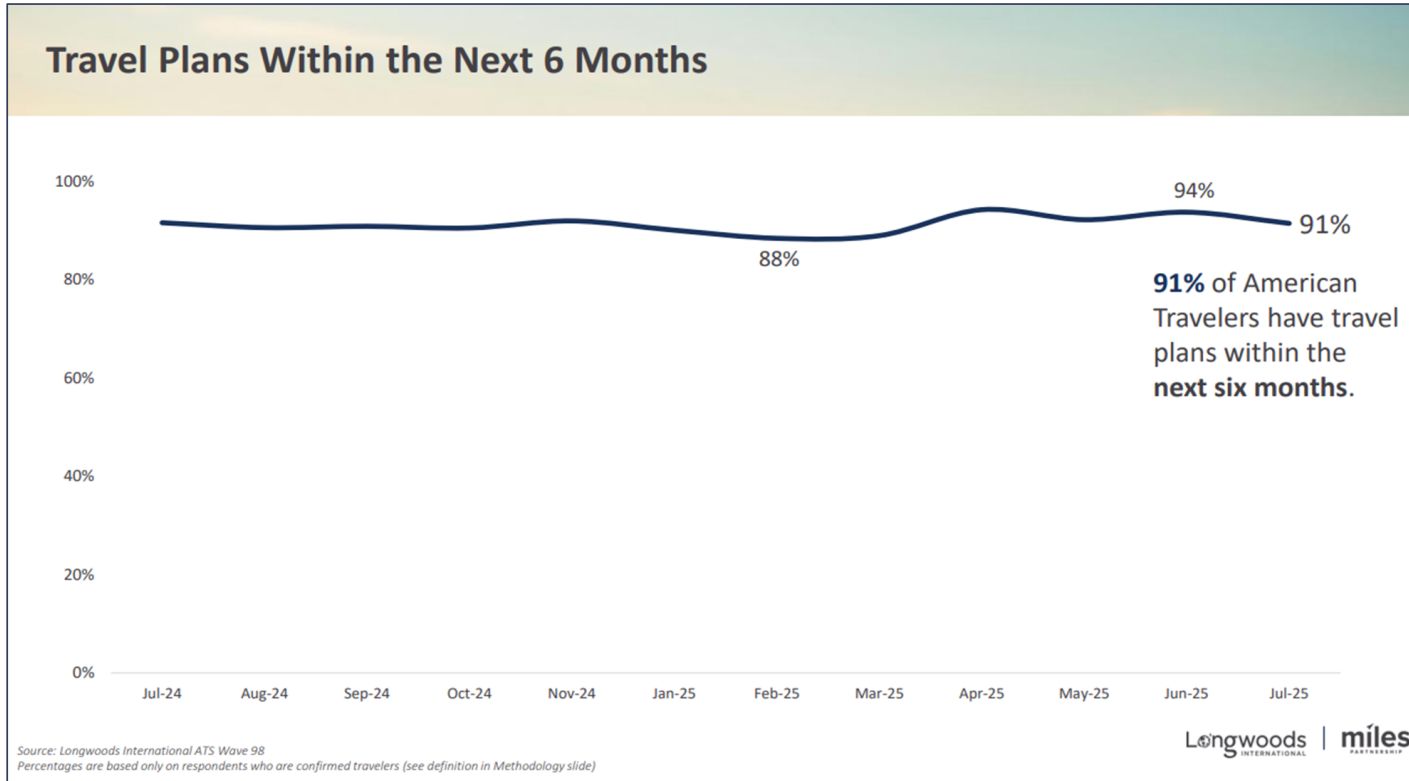
Source: Longwoods International

American Travel Sentiment Study Wave 98



*Survey fielded July 1, 2025; US National Sample of 1,000 adults 18+

*Page 39 of 43



Source: Longwoods International

American Travel Sentiment Study Wave 98



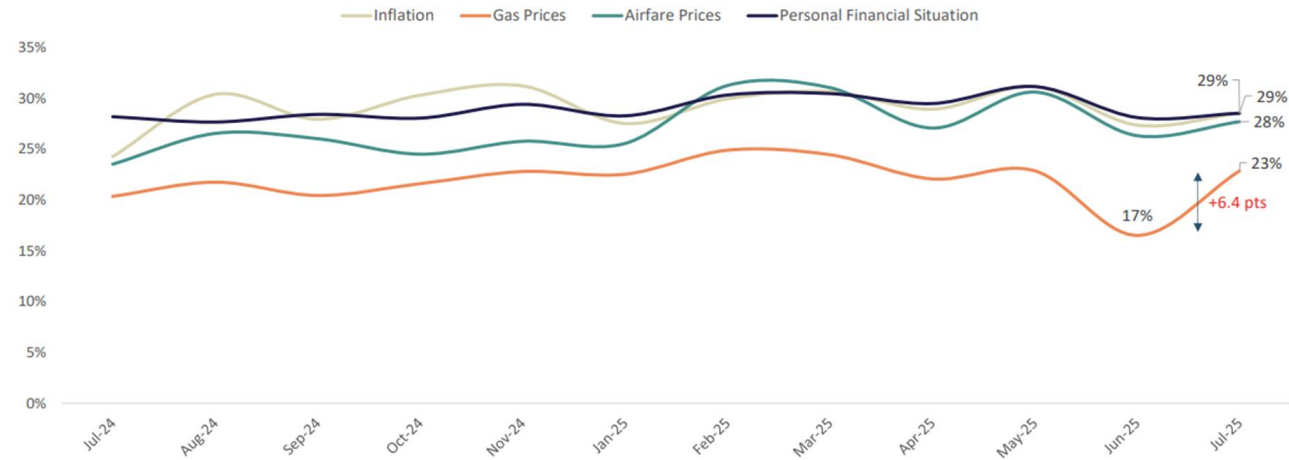
*Survey fielded July 1, 2025; US National Sample of 1,000 adults 18+

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Increase in Concern About Gas Prices Greatly Impacting Travel Plans

Concerns Impacting Your Travel Decisions in the Next Six Months

The chart shows the percentage of respondents who rated each factor as "Greatly impact" their travel plans (a 5 on a 1-5 scale) over the period from June 2024 to June 2025.



Source: Longwoods International ATS Wave 98
Percentages are based only on respondents who are confirmed travelers and intend on traveling in the next six months



Source: Longwoods International

American Travel Sentiment Study Wave 98



*Survey fielded July 1, 2025; US National Sample of 1,000 adults 18+

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American Travel Sentiment Methodology

The American Travel Sentiment Study is the most comprehensive and longest-running survey of its kind, offering valuable insights into the factors influencing American travel behaviors.

Key Details:

- Survey Date: July 1, 2025
- Sample Size: 1,000 U.S. adults (18+)
- Margin of Error: $\pm 3\%$
- Representative of U.S. population demographics (age, gender, region)

Travelers are only respondents that have taken a trip in the last 3 years and intend to take a trip in the next 2 years.

Conducted with support from Miles Partnership, this study remains a vital tool for understanding the dynamic landscape of American travel.



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Source: Longwoods International

THANK YOU

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