



MONTEREY

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# SEE MONTEREY DESTINATION MARKETING UPDATE

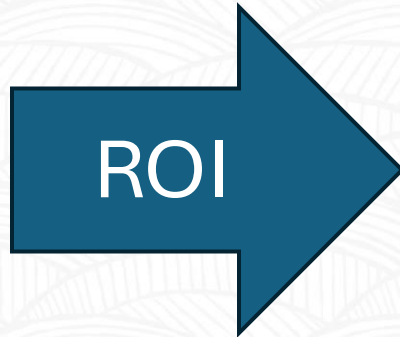
Carmel-by-the-Sea  
May 5, 2026

# Carmel-by-the-Sea Tourism Investment

## See Monterey July – March Report (FY 2025-26)

Leveraging the Carmel-by-the-Sea's YTD investment of \$178K with the combined jurisdiction and hotel investments yielded a tremendous ROI for our entire community. See Monterey's marketing communications efforts contributed to reaching over **20 million travel-ready households** and **more than 1 million ad-influenced intended trips** to Monterey County.

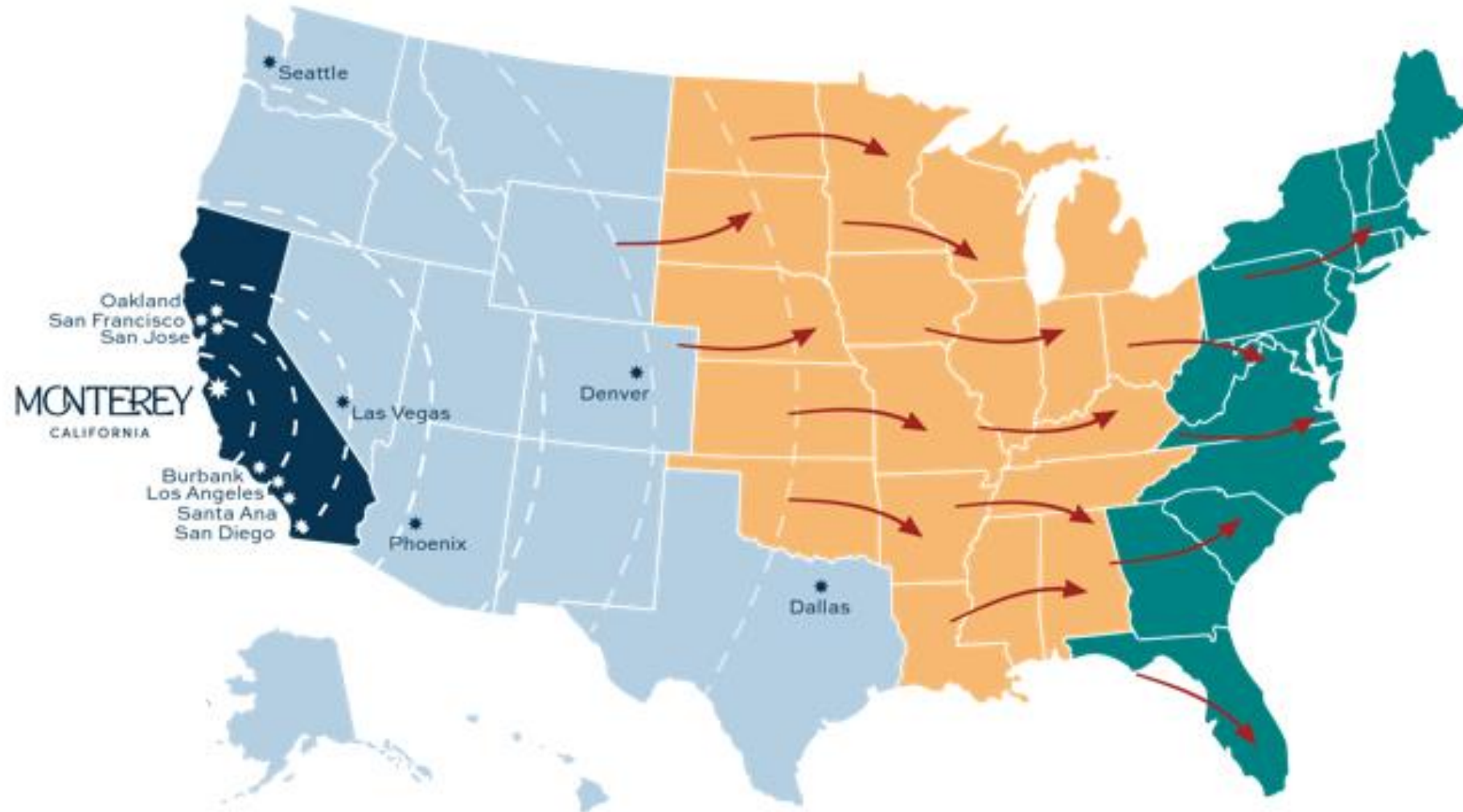
**\$178K**  
**Investment**



- **\$95M Visitor Spending in Carmel**
- **\$340,597 Meetings/Group Business Economic Impact Generated for Carmel**
- **298 Room Nights**
- **14k Website Referrals** to Carmel businesses
- **\$8.3M PR Ad Equivalency**
- **1.61B Earned Media Impressions**
- **111.7k Social Media Engagements** (likes, clicks, shares)

# High-Value Travelers

## Marketing Reach



# International Travelers

## International Reach

### TIER 1 ACTIVE MARKETS



### TIER 2 DEVELOPMENT MARKETS

#### Asia Pacific

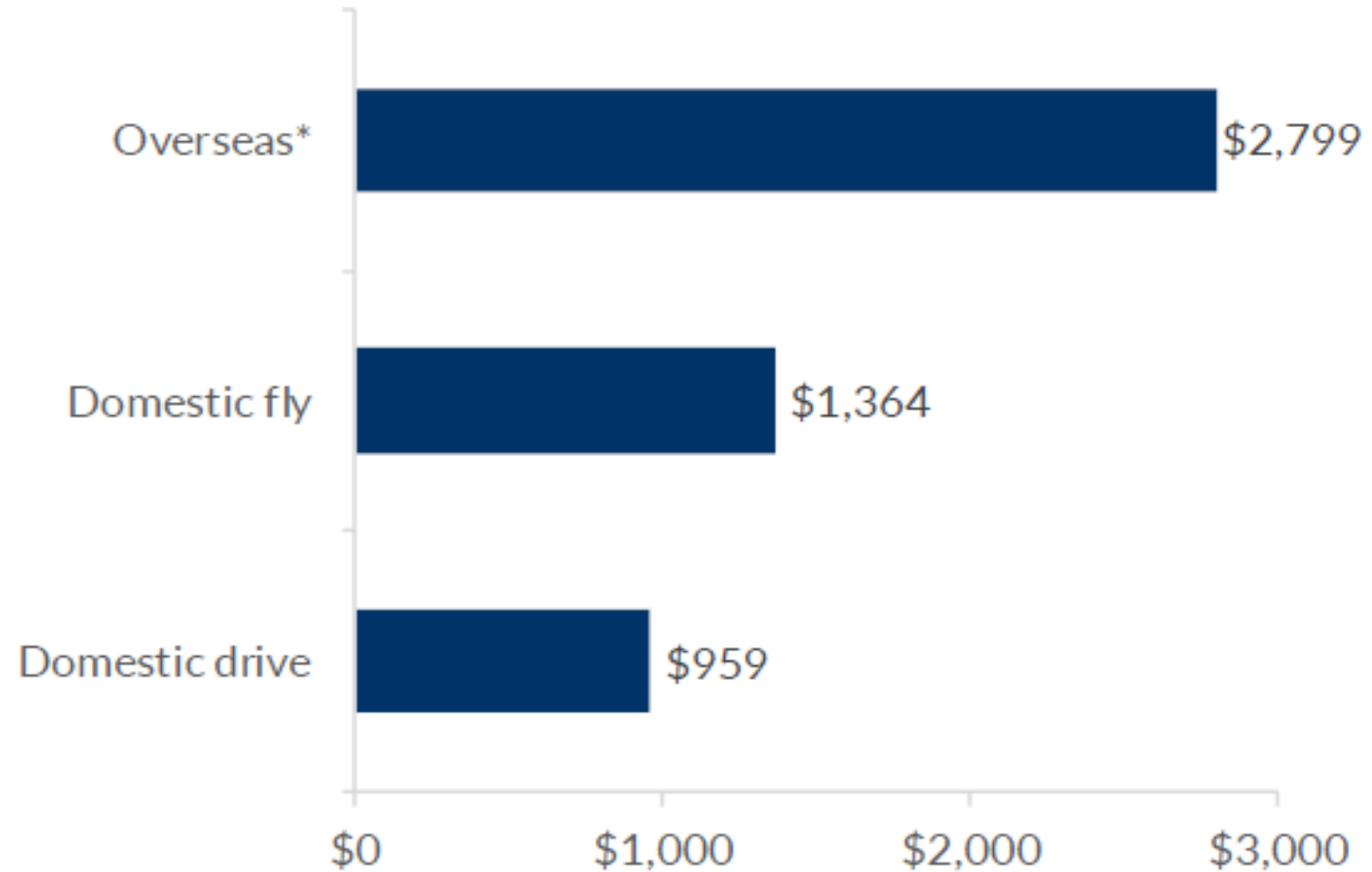


#### Western Europe



# Distance = Higher Spending

Spending per trip by origin market



Sources: SMARI; Tourism Economics

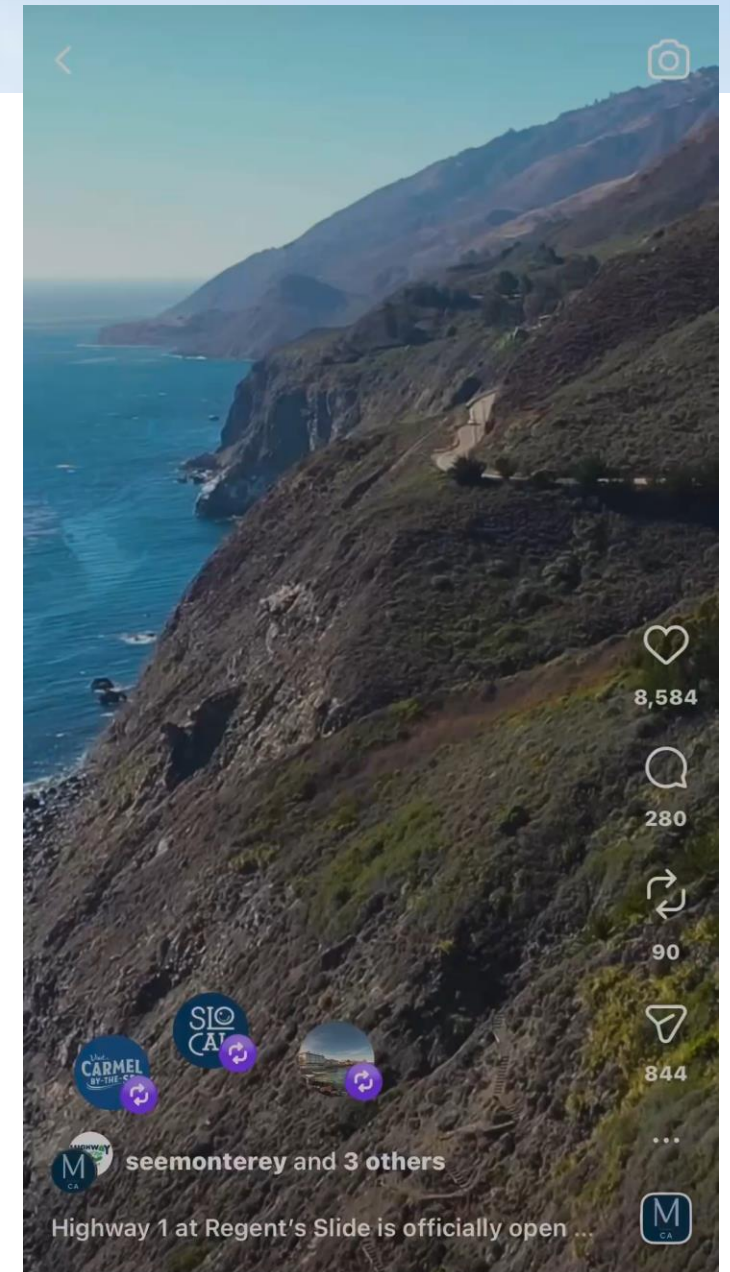
\*California figure – calendar year 2020, other figures FY2021

Dollars per trip

# HIGHWAY 1 – NOW OPEN!

## HWY1 – California's FIFA Road Trip

- Major global push celebrating full reopening of HWY 1
- Leveraging FIFA spotlight to position HWY 1 as the best route between SF and LA matches
- Re-establishing HWY 1 as a must-do on international itineraries
- Coordinating with Caltrans and the Governor's Office on a high-impact reopening moment (May 2026)
- Doubling down on Responsible Travel messaging – renewed collaboration with Big Sur Byways Organization
- Early momentum: strong demand returning, with coastal hotels and restaurants filling fast



# Air Service Development

***4K Additional Seats per week!***

**New Service - United: Chicago (ORD)** launching May (166 seats)

**Capacity Growth (Upgauges to 737-800 | +90 seats per flight)**

**LAX** – Begins Apr 30; 6:10pm arrival | Overnight | 7:03am departure  
*Planned through September*

**DEN** – Begins May 21; 8:55pm arrival | Overnight | 5:00am departure  
*Planned indefinitely (performance-based)*

**DFW (American)** – Returns May 21; 11:55am arrival | 12:40pm departure  
*Planned through summer; previously upgauged to 737-800*

**JSX – Service Resumes June 11**



# Wine Country PROMOTIONS



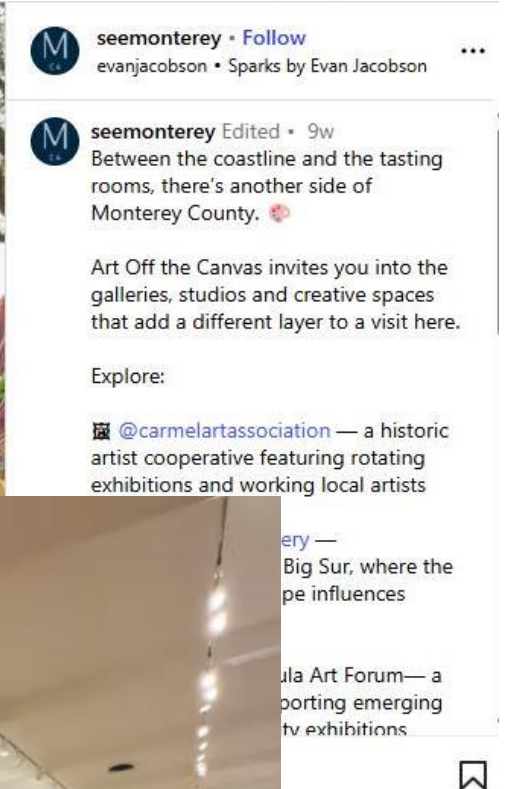
# OFF THE CANVAS: ARTS & CULTURE



Carmel-by-the-Sea's roots are planted firmly in the earth of its artistic and cultural heritage. Originally formed as an artists' community, it remains a central point for both fine arts and performing arts on California's Central Coast. Why else would the [Cultural Council for Monterey County](#) call Carmel-by-the-Sea its home?

## CARMEL-BY-THE-SEA ART GALLERIES

Carmel-by-the-Sea's walkable community makes it convenient to shop for and enjoy established and emerging artists in its dozens of galleries. The [Carmel Art Association](#) is one of the oldest cooperative art galleries in the United States. Its monthly art openings, lecture series and constantly changing exhibit of work all contribute to its enduring success.



"Monterey County is a living canvas – our murals, galleries and stages reflect the people and stories that call this place home."  
– Jacquie Atchison, Executive Director, [Arts Council for Monterey County](#)



# Local Business Membership & Support

Thanks to the City's investment, **190+ businesses in Carmel-by-the-Sea** receive FREE membership and marketing support from See Monterey

190+ local businesses supported by See Monterey, include:

- 50+ Restaurants
- 20+ Galleries
- 16 Tasting Rooms
- Retail
- Jewelers
- Cultural establishments, theatres
- Farmers market

**10 NEW** local members

- Lighthouse Wellness Studio
- Nora's Restaurant
- Owl & Kittycat
- Robin Winfield Gallery
- Sea Shack Candy
- VIN by the Sea
- Bea's Studio
- Windy Oaks
- Antieau Gallery
- Nancy Dodd's Gallery

# 3 Luxury Resorts in Carmel-by-the-Sea

*Monterey County has the most diverse portfolio of luxury properties and experiences anywhere on the West Coast*

~ ~ ~

10 luxury properties account for 27% of total County TOT revenue

Alila.  
VENTANA BIG SUR

*La Playa Hotel*

L'AUBERGE  
CARMEL  
1929  
HOTEL & RESTAURANT

CARMEL BEACH  
HOTEL



THE LODGE  
PEBBLE BEACH®

  
Post Ranch Inn  
BIG SUR

  
BERNARDUS  
LODGE & SPA

*Casa Palmero*  
PEBBLE BEACH®

  
CARMEL VALLEY RANCH

THE INN AT  
SPANISH BAY  
  
PEBBLE BEACH®

# Harnessing the Value of Events

## Event Development Strategy

Goal – Evaluate Existing/Attract New

- Formed Event Task Force
- Stakeholder Sessions, 2/17 and 2/19
- Destination Tours
- Discussions with key Event Organizers
- Gather Data from City & County on permitting process
- Final Analysis Completed April 2026



# Destination Stewardship & Responsible Travel

- Responsible Travel 2.0
- Elevated Destination Stewardship
- Dedicated Investment
- Direct Messaging to Visitors
- Local Partnerships – KRML, Big Sur Byways, ParkIt!, BSMAAC, MST, County Parks



# Carmel-by-the-Sea Extension

- Dedicate one-third of Carmel's investment to a Carmel-specific extension of the Responsible Tourism program
- Prioritize traffic mitigation and visitor flow management
- Co-developed with Visit Carmel, City staff, and the CRA
- Always-on, year-round campaign deployment



# Travel Outlook

## **Good**

Strong alignment with demand: travelers seeking inspiration, outdoor experiences, and diverse, authentic destinations

## **Bad**

Group/business travel growth flattening, with longer booking windows and increased competition

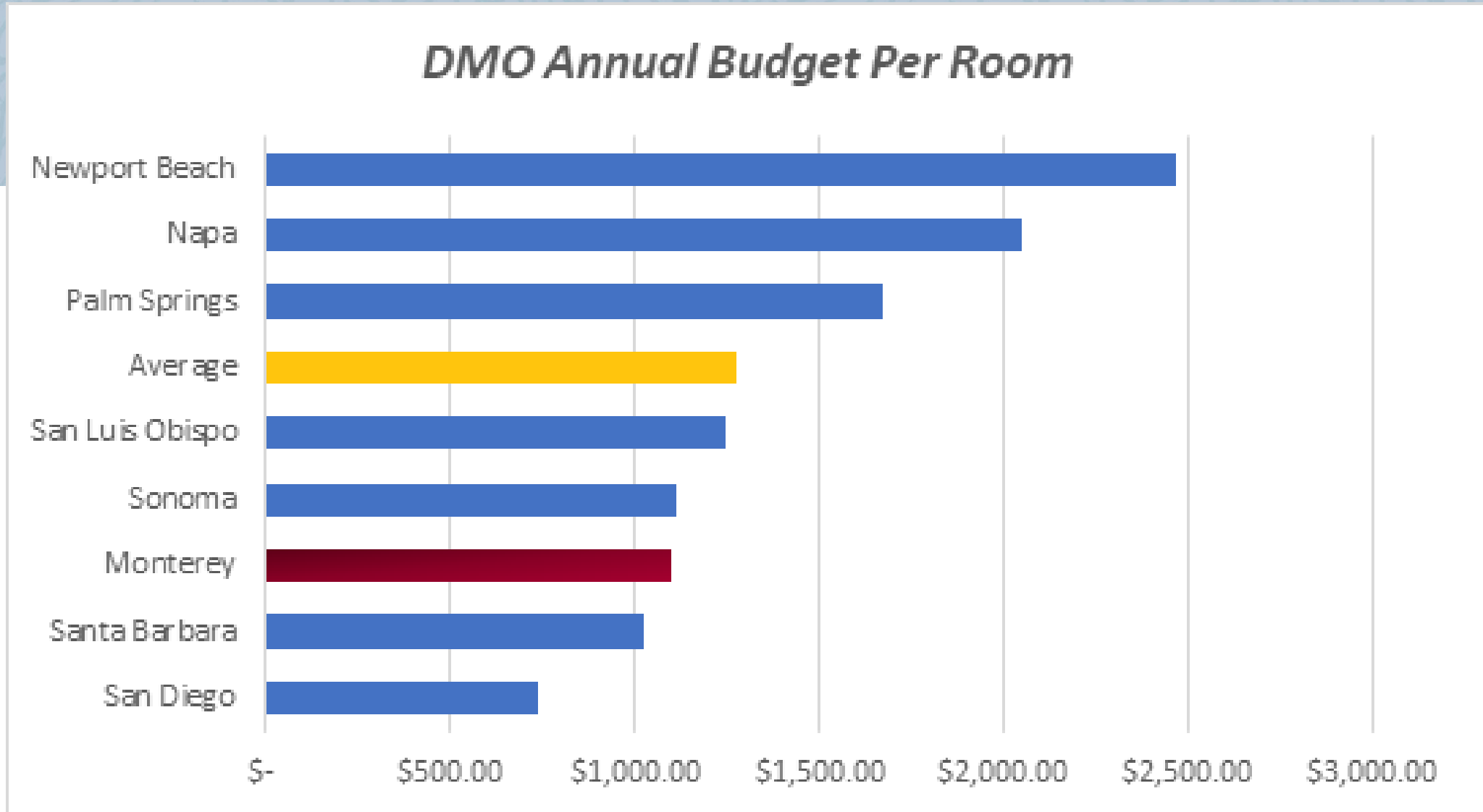
## **Ugly**

Heightened uncertainty: declining international visitation, stronger global competition, reduced Brand USA funding, and dollar volatility impacting inbound demand



# DMO annual budgets

*Competitive analysis*



# PLANNING FOR LONG TERM SUCCESS

High-Value Destinations with Stronger Occupancy Performance  
Typically have 75–80% Occupancy

Bar Harbor, ME

Sedona, AZ

Nantucket, MA

Aspen, CO

Park City, UT

Jackson Hole, WY

Santa Fe, NM

Telluride, CO

St. Helena / Yountville,  
CA

***Thank You*** for  
your continued partnership.

