



MONTEREY

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Carmel-by-the-Sea

Visitor Management Inflection Point

July 6, 2026

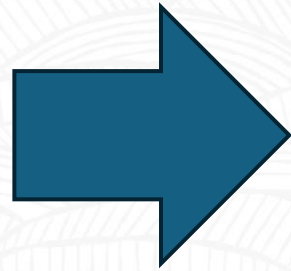
Carmel-by-the-Sea Tourism Investment

FY 26/27 Investment Request Overview

Carmel-by-the-Sea is part of a destination-wide Regional Partnership that includes eight other cities and the County of Monterey. This Public/Private partnership is centered on driving economic vitality and quality of life for our communities and residents.

3% of Projected TOT

~\$290K Investment

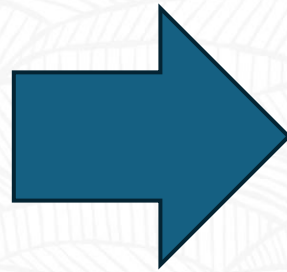


Historical Approach – 20 Year Partnership

- Global Destination Marketing
- Responsible Travel & Stewardship Collaboration
- 140+ Business Memberships
- Data, Research & Analytics
- Board Representation
- Event & Air Service Development

Decade-long Approach to Grow Fly-in Visitation

**See Monterey's
80/20 Rule**

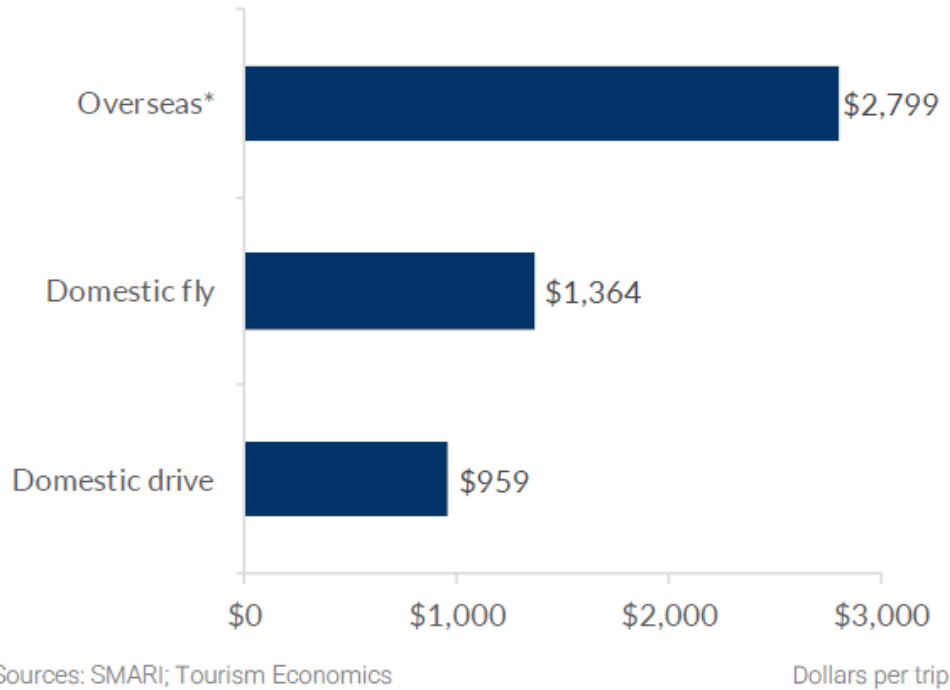


It's working

- Fly-in visitation is a decade long strategic focus
 - 2016 – 14.4%
 - 2024 – 20%
- Focus is now more than 80% of our budget
- Community invests in new air service – See Monterey maintains it
- Airlines respond to Demand
 - New Chicago flight + upgauging = over 3,000 new seats to MRY per week this summer

Value of Fly-In & International Visitation

Spending per trip by origin market



Sources: SMARI; Tourism Economics

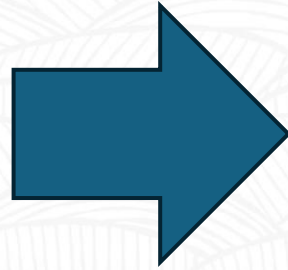
*California figure – calendar year 2020, other figures FY2021

More value—not simply more visitors.

- Higher-value visitors. Greater economic impact
- Fly and international visitors spend substantially more per trip
- Supports higher occupancy, TOT, Sales Tax, and local business sales
- Building on and beyond Visit Carmel efforts, See Monterey is Carmel's consistent reach into long-haul and international markets.

Seat at the Regional Table

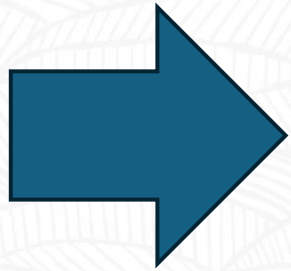
A Voice in Shaping the Region's Future



- See Monterey Board Representation
- Shape regional tourism strategy
- Build stronger partnerships
- Ensure Carmel's voice is represented
- Leverage See Monterey's regional partnerships with MRY, CSUMB, MST, the Monterey Bay Aquarium, and other key organizations

Today's Inflection Point

**Finding
New
Balance**

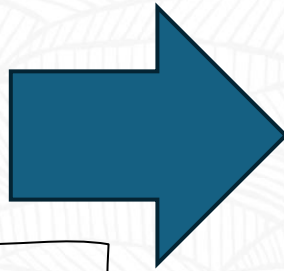


Today's Reality

- Situational Overcrowding
- Underperforming Occupancy & Revenue
- Resident Quality of Place Under Pressure
- Visitor Experience Falling Short

See Monterey proposes: one-third of investment back into Carmel-by-the-Sea Visitor Management Analysis

Visitor Management Analysis



Relevant Experience

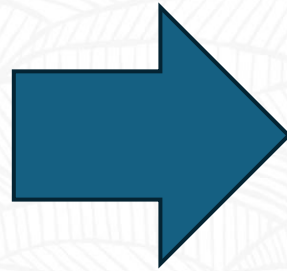
- Hawaii Tourism Authority
- Vail: 'Community-Positive' destination stewardship
- Lake Tahoe Regional Destination Stewardship Plan.

Potential Areas of Focus

- Reduce congestion & improve visitor flow
- Collaboration on current parking & infrastructure strategies
- Grow overnight stays & visitor value
- Improved understanding of overnight vs day-trip visitors
- Apply destination best practices
- Timeline: July Kickoff • Initial Draft: November 2026

Community Focused, Community Led

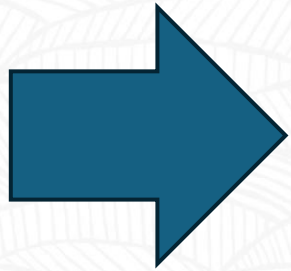
Carmel-wide Partnership



- Open and transparent process led by CRA, Chamber, City, Visit Carmel
- Include the both voice of residents, businesses, and visitors
- Funded by See Monterey
- Built through collaboration
- Driven by community priorities
- Focused on balanced economic vitality and maintaining character of community

Visitor Profile Study

**Who visits, why
and impact**



- Year-long, seasonal reports
- Identify the highest-value visitor segments
- Measure visitor spending and economic impact
- Understand visitor behavior and movement
- Identify seasonal and daily visitation trends
- Bolster visitor management strategies
- Sharpen focus on attracting high-value overnight guests

“To protect and preserve the rugged, scenic, natural beauty of Big Sur and its cultural heritage, benefit the local economy, and foster a welcoming and sustainable community for generations to come.”

- Big Sur Destination Stewardship Plan Vision Statement

Thank You

