



JULY 23, 2025

SEE MONTEREY JOINT MARKETING & SALES COMMITTEE

MONTEREY

FIND YOUR WAY HERE™



PUBLIC COMMENT



STAFF ANNOUNCEMENTS

NEW HIRES & OPEN POSITIONS



Alexa Rogalski

Client Services
Coordinator



Kelsey Shoup

Member Relations
Specialist

Open Positions

Director of Public
Relations

Content Manager

Business
Development
Executive,
NorCal/PNW

CAL TRAVEL 30 & UNDER EMERGING LEADERS



Sandy Huerta
Communications
Specialist



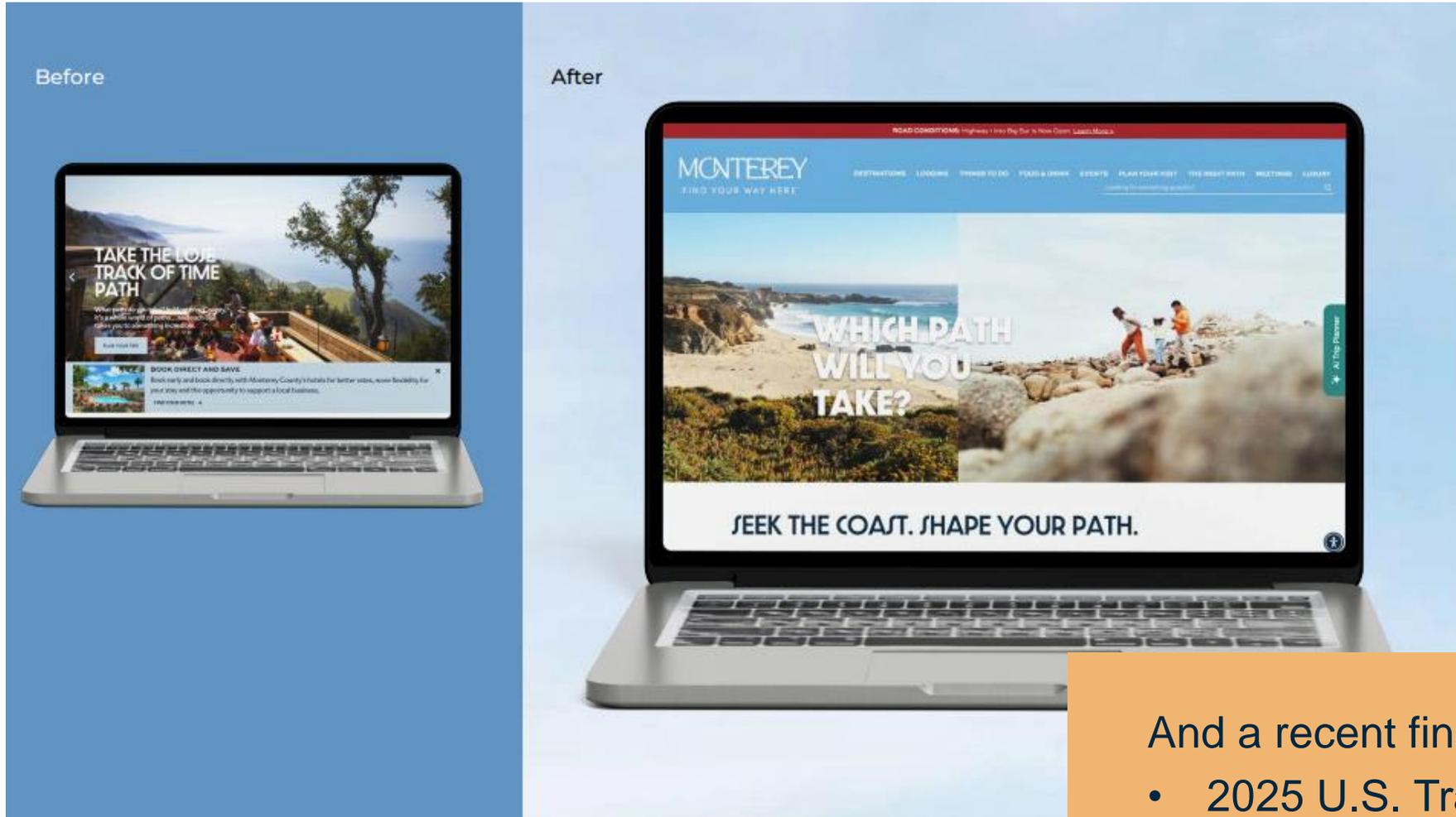
Marci Yeater
Marketing
Coordinator



Hoku Young
Digital Marketing
Manager

HERMES AWARD

Gold Winner 2025: Website Design

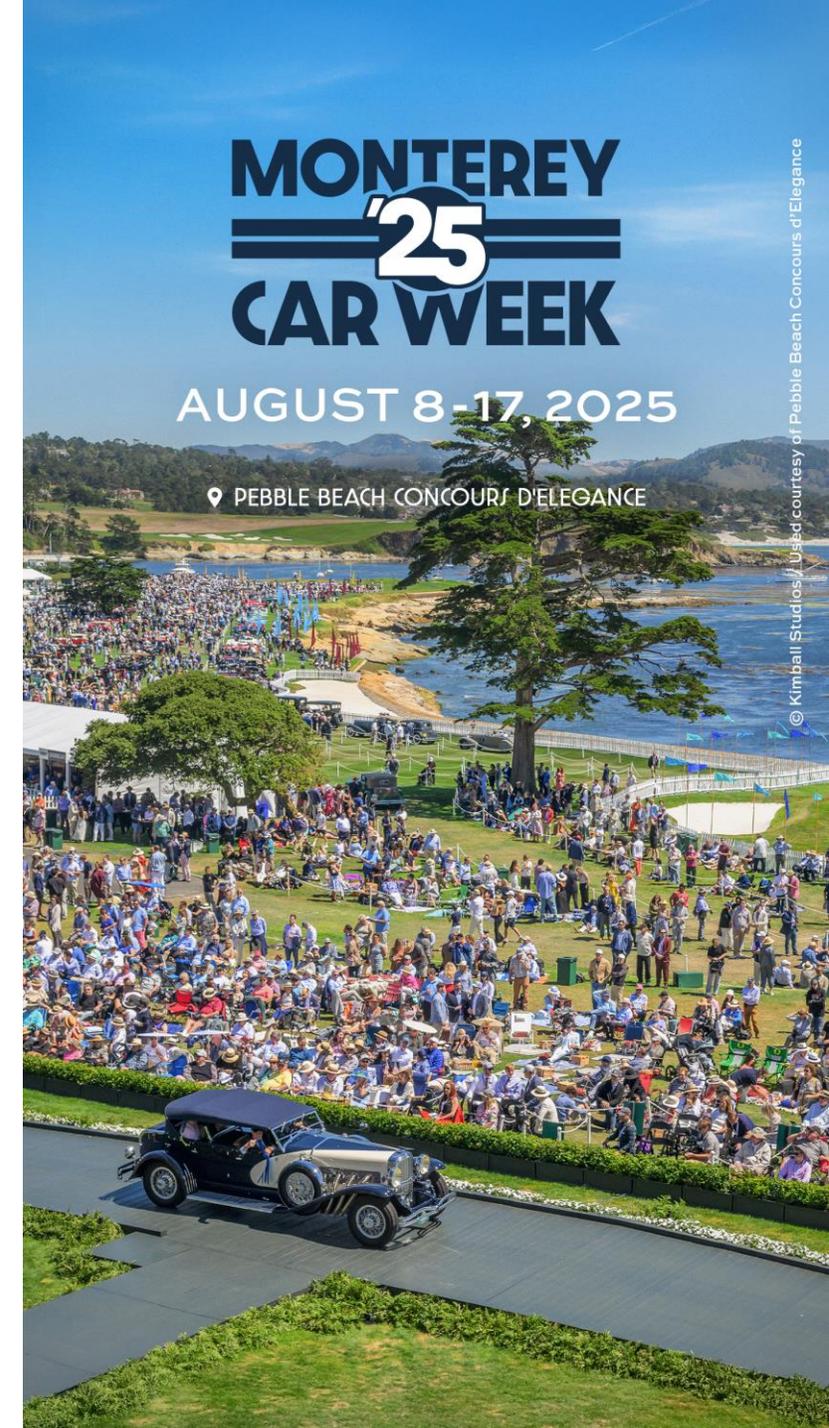


And a recent finalist for:

- 2025 U.S. Travel's ESTO Awards
- 2025 Skift IDEA Awards

MONTEREY CAR WEEK

- Car Week Media Roundtable on July 30 @ Laguna Seca
- New Content Hub on SeeMonterey.com
- Out-of-market Ads
- In-market Responsible Travel Ads





CONSENT AGENDA

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1

Minutes of the April 16, 2025, Joint Marketing and Sales Committee Meeting
Recommended Action: Approve Minutes as presented.

2

Department Reports
Recommended Action: Receive June 2025 department reports.



REGULAR AGENDA

REGULAR AGENDA

A. FY2024-25 YEAR END RESULTS



Hotel Report Generator

Monterey County, CA+, January 2025 - June 2025



X

Report Filters

Report Region: Monterey County, CA+ | From: January 2025 | To: June 2025 | Compare to: Previous Year

To compare to 2019 please limit date range to 12 months or less

Aggregated Hotel Performance

Period: January 2025 to June 2025

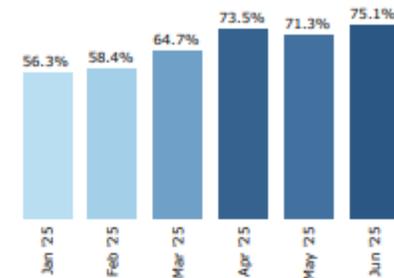


Monthly Hotel Performance

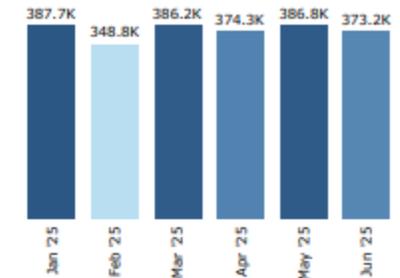
January 2025 to June 2025 compared to the same months in Previous Year

	Occ	YOY	ADR	YOY	RevPAR	YOY	Supply	YOY	Demand	YOY	Revenue	YOY
Jan 2025	56.3%	▲17.4%	\$211	▲3.5%	\$119	▲21.6%	387.7K	▲0.5%	218.1K	▲18.0%	\$46.0M	▲22.2%
Feb 2025	58.4%	▲5.7%	\$217	▼2.2%	\$127	▲3.4%	348.8K	▲0.1%	203.6K	▲5.8%	\$44.3M	▲3.6%
Mar 2025	64.7%	▼0.1%	\$226	▲0.4%	\$146	▲0.3%	386.2K	▼0.6%	249.8K	▼0.7%	\$56.5M	▼0.4%
Apr 2025	73.5%	▲8.9%	\$248	▲1.1%	\$182	▲10.0%	374.3K	▼0.2%	275.2K	▲8.7%	\$68.3M	▲9.8%
May 2025	71.3%	▲4.3%	\$273	▲0.7%	\$195	▲5.1%	386.8K	▼0.9%	275.7K	▲3.4%	\$75.3M	▲4.1%
Jun 2025	75.1%	▼0.4%	\$273	▼1.8%	\$205	▼2.2%	373.2K	▼0.7%	280.2K	▼1.0%	\$76.4M	▼2.8%

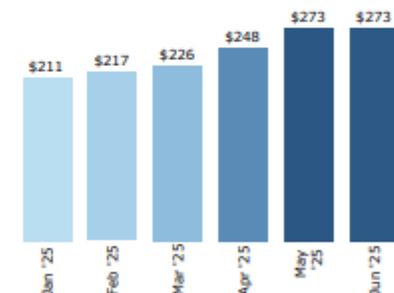
Occupancy



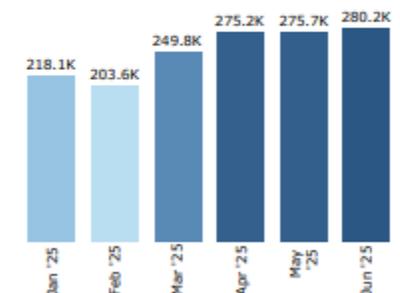
Supply



ADR



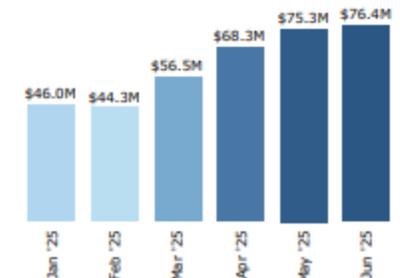
Demand



RevPAR



Revenue



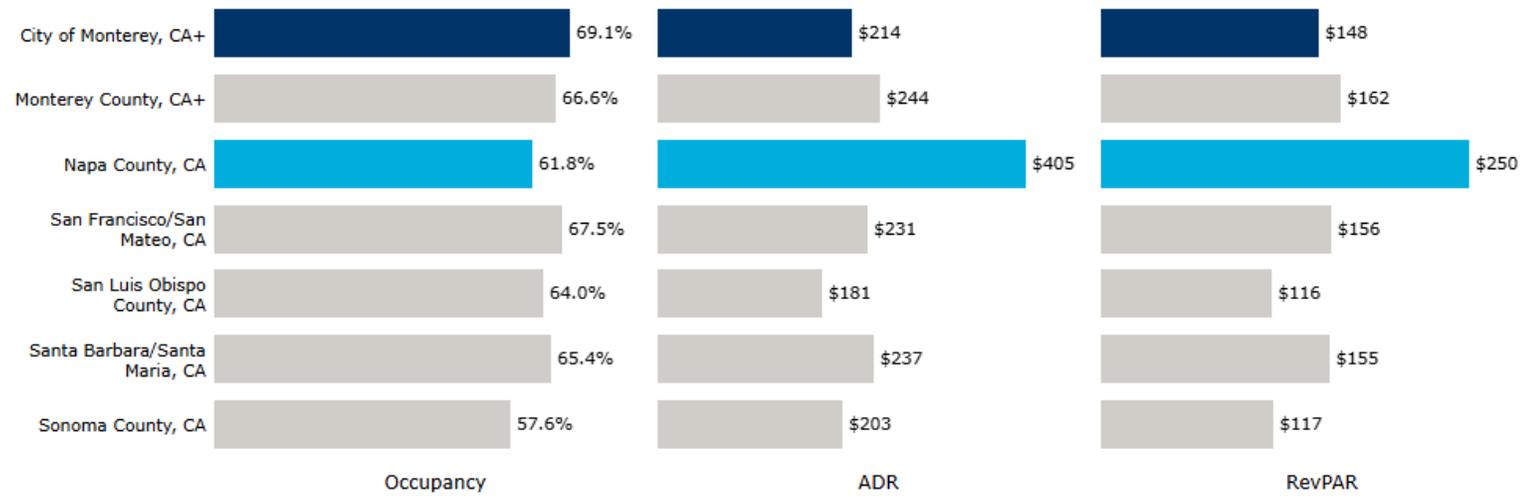
Competitive Markets Hotel Performance

Napa County, CA vs. Comp. Markets



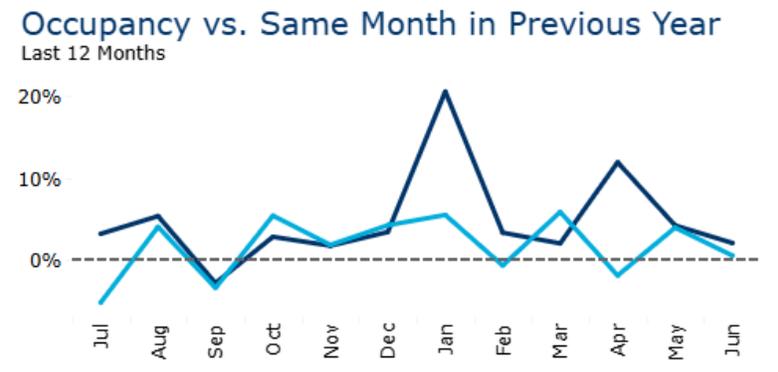
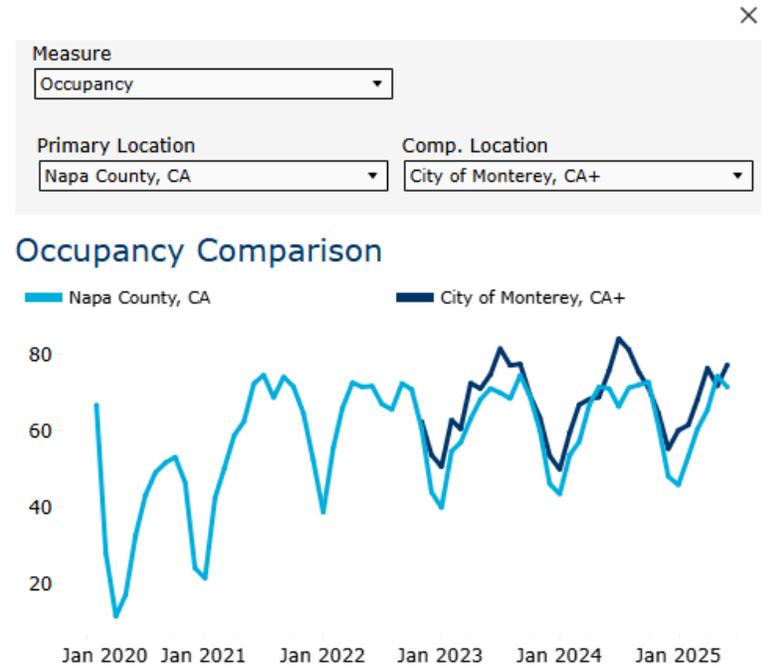
Month:
 Report Type:
 Compare to:
 Supply:
 Markets:
 Measures:

Jan - Jun 2025, Comp. Markets Hotel KPIs



Jan - Jun 2025, Comp. Markets Hotel Performance vs. Previous Year

	Occ	YOY	ADR	YOY	RevPAR	YOY	Total Supply	YOY	Demand	YOY	Revenue	YOY
City of Monterey, CA+	69.1%	▲ 6.8%	\$214	▼ -0.4%	\$148	▲ 6.4%	854.5K	▼ -0.1%	590.4K	▲ 6.8%	\$126.3M	▲ 6.3%
Monterey County, CA+	66.6%	▲ 5.3%	\$244	▼ -0.2%	\$162	▲ 5.0%	2.3M	▼ -0.3%	1.5M	▲ 4.9%	\$366.7M	▲ 4.7%
Napa County, CA	61.8%	▲ 2.1%	\$405	▲ 0.9%	\$250	▲ 3.0%	960.2K	▲ 0.1%	593.1K	▲ 2.1%	\$239.9M	▲ 3.1%
San Francisco/San Mateo, CA	67.5%	▲ 5.3%	\$231	▲ 4.0%	\$156	▲ 9.4%	10.0M	▼ -0.3%	6.8M	▲ 4.9%	\$1.6B	▲ 9.0%
San Luis Obispo County, CA	64.0%	▲ 3.4%	\$181	▲ 0.7%	\$116	▲ 4.1%	1.9M	▲ 1.1%	1.2M	▲ 4.6%	\$218.3M	▲ 5.3%
Santa Barbara/Santa Maria, CA	65.4%	▲ 0.7%	\$237	▲ 2.4%	\$155	▲ 3.1%	2.0M	▼ -0.2%	1.3M	▲ 0.4%	\$302.8M	▲ 2.9%
Sonoma County, CA	57.6%	▼ -2.3%	\$203	▼ -1.2%	\$117	▼ -3.5%	1.4M	▲ 1.1%	824.4K	▼ -1.2%	\$167.2M	▼ -2.4%



History for markets varies. Click on a market to check its history in the line charts

Source: STR

Business Plan Update – Major Programs



Marketing Communications

- Connected Leisure, Group, Lux and Responsible Travel under “Find Your Way Here” brand
- Launched new SeeMonterey.com
- Grew international and luxury marketing programs

Business Development

- Major in-market activations – CalSAE Elevate, MPI NCC, FAMs
- Partnership growth – Maritz, SITE and Prestige
- Show up Bigger- MPI WEC

Public Relations

- The Points Guy editorial retreat hosting
- James Beard Foundation media event + culinary activation
- HOW 2 HWY 1 Launch: SMT, national newswire release, influencer collaboration

Tour & Travel

- Wider global distribution for Monterey County product
- Increased partnerships with travel advisor networks
- Active at tradeshow and international sales missions, hosted FAM trips

Countywide Impacts

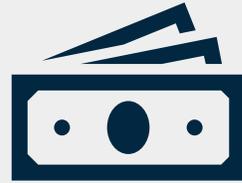
Marketing Communications



Influenced

547K

Overnight Visitor Trips



Generated

\$1.1B

Influenced Visitor Spending



Resulted in

\$448

Visitor Spending for Every Ad Dollar



Reached

9M

Traveling Households

Business Development



Generated

775

Leads



Accounted for

203

Groups Booked



Accounted for

83.1K

Room Nights Booked



Booked

\$86M

In Economic Impact

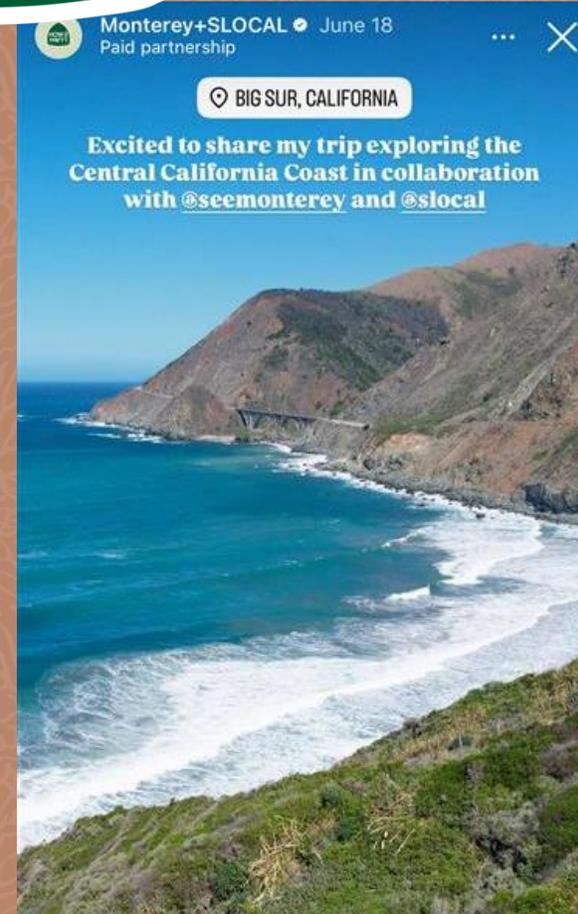
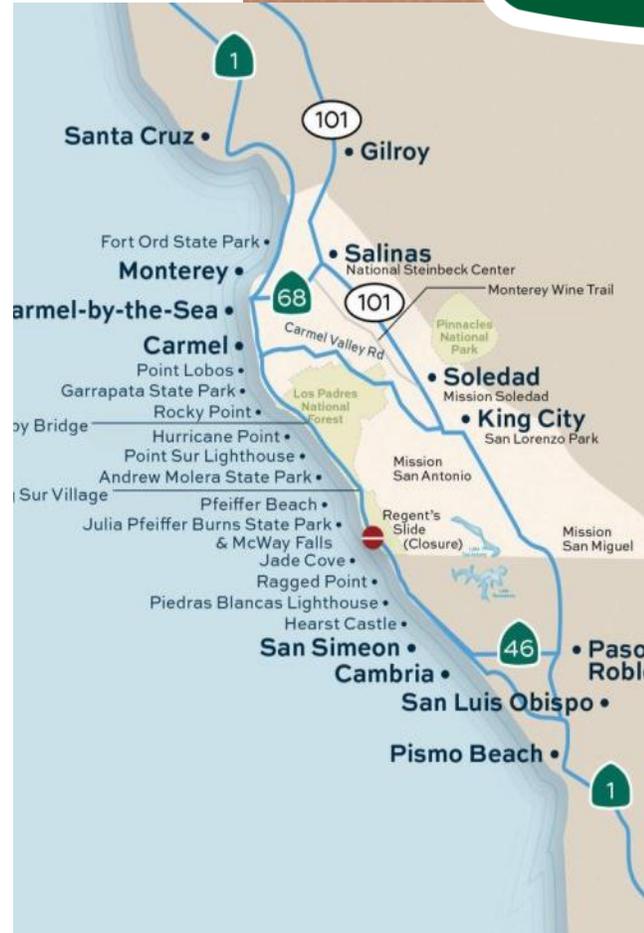
HOW 2 HWY 1

Goal:

Support a long-term shift in messaging that communicates the ease and options of a Big Sur Road Trip regardless of highway conditions or closures

Launch Results:

Landing Page Visits: **1.6K**
Social Engagements: **7K+**
Media Placements: **1,374**
Audience: **175 million**
Ad Value: **\$528,000**



Another Day in Monterey County

- April – June offer period
- **60K+ Sessions**, including **50K New Users** to the campaign landing page
- **17.3K+ partner referrals** to hotel booking links
- **752** room nights booked
- **\$823K** Economic Impact

TRAVELZOO[®]

3rd night free—Monterey stays through June

By Camille Guzman



See Monterey 
Sponsored · 

Another day to hit the beach. Or take that hike. Or try that restaurant. Or ... you get the idea. However you spend the extra day, the extra night is free.

 PACIFIC GROVE



**ENJOY YOUR
3RD NIGHT FREE**

BOOK 2 NIGHTS, GET A 3RD FREE

[SEEMONTEREY.COM/STAY-ANOTHER-DAY-IN-MONTEREY-COUNTY](https://seemonterey.com/stay-another-day-in-monterey-county)

Claim Your Free Night Before Offer Ends.

See Monterey

BOOK NOW

  439

100 Comments 28 Shares

 Like

 Comment

 Share



The Right Path

Goal:

Encourage more respectful travel, ensuring all travel paths contribute to a better quality of place

Focus Areas:

Educate visitors before they arrive and remind while they are here

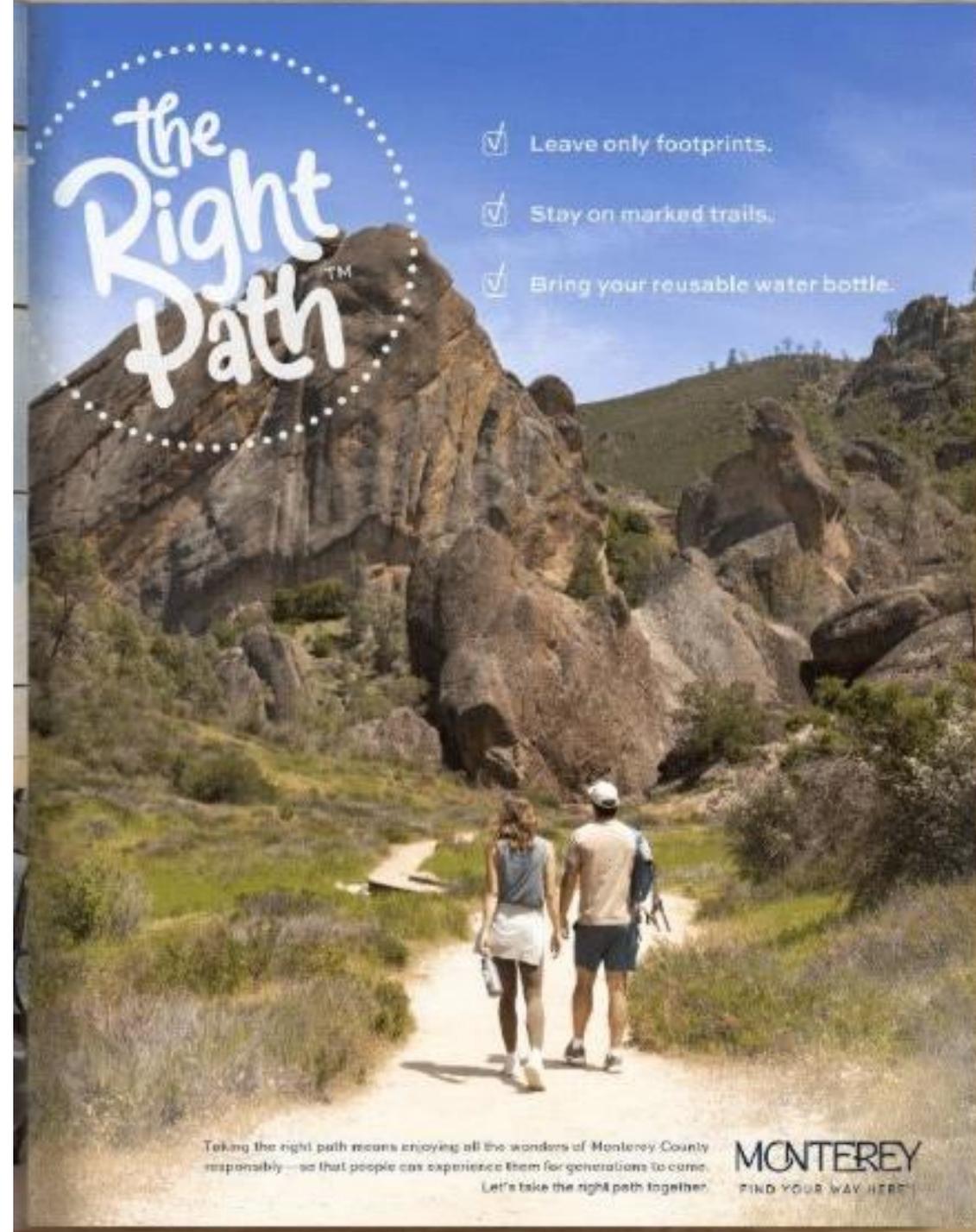
Key Assets:

Billboards in Bay Area + Salinas

MST bud-side ads

Local print ads

In-market social



REGULAR AGENDA

B. FY2025-26 BUSINESS PLAN



Hotel Forecast: Monterey County, CA+ - Total Segment Summary



Indicator Levels

	2024	2025	2026
Occupancy	66.9%	68.5%	68.3%
ADR	\$268	\$271	\$276
Rev PAR	\$179	\$186	\$189
Supply	4.57M	4.56M	4.66M
Demand	3.05M	3.13M	3.18M
Revenue	\$817.8M	\$847.9M	\$877.7M

% Change vs. Previous Year

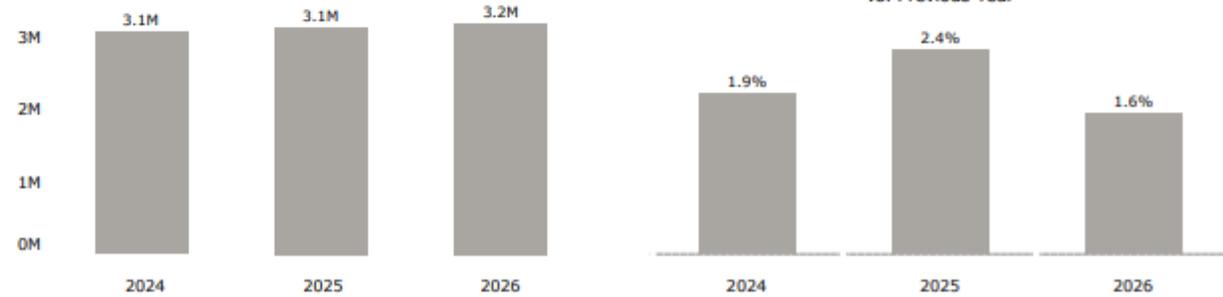
	2024	2025	2026
Occupancy	1.1%	2.4%	-0.4%
ADR	0.4%	1.3%	1.9%
RevPAR	1.5%	3.7%	1.5%
Supply	0.8%	-0.1%	2.0%
Demand	2.3%	3.7%	3.5%
Revenue	2.3%	3.7%	3.5%

% Change vs. 2019

	2024	2025	2026
Occupancy	-7.6%	-5.3%	-5.7%
ADR	16.8%	18.3%	20.5%
RevPAR	8.0%	12.0%	13.7%
Supply	4.5%	4.4%	6.5%
Demand	-3.4%	-1.1%	0.5%
Revenue	12.8%	17.0%	21.1%

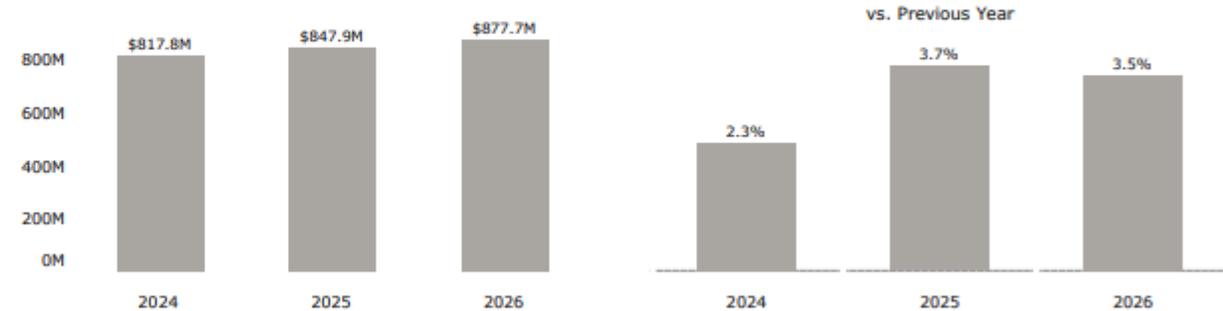
Room Demand

Monterey County, CA+ - Total Segment



Room Revenue

Monterey County, CA+ - Total Segment



Sources: STR, Tourism Economics; Forecast as of May 2025

Business Development Strategies

1. **Grow “NEW”**- SMERF & Niche Group Leads
2. **Increase In-Market Visits** - Industry events and FAMs
3. **Trade Show Strategy** - “Show up Bigger”
4. **Incentivize Meetings** - Drive Need Periods
5. **Maintain Momentum** - International Travel Trade



Business Development Budget

FY2024-25 comparison to FY 2025-26

Business Development	FY2024-25 Reforecast	FY2025-26 Budget	Difference	% Chg	
BD Programs	116,603	115,618	(985)	-1%	
Group Events	1,109,442	1,319,150	209,709	19%	Showing up Bigger at IMEX, PCMA, CEMA
Leisure Events	400,221	402,900	2,679	1%	
Meeting Incentives	99,746	120,000	20,254	20%	Promoting group incentive earlier and more often
Group Marketing	863,467	985,000	121,533	14%	Budget added to media to expand campaigns, grow reach and add additional support for sales activities.
BD Operations	109,249	104,759	(4,490)	-4%	Reclassification of sponsored events out of market to grow next years attendance; moved from BD operations to Group Events.
Total Business Development	2,698,726	3,047,427	348,701	13%	

Business Development Goals

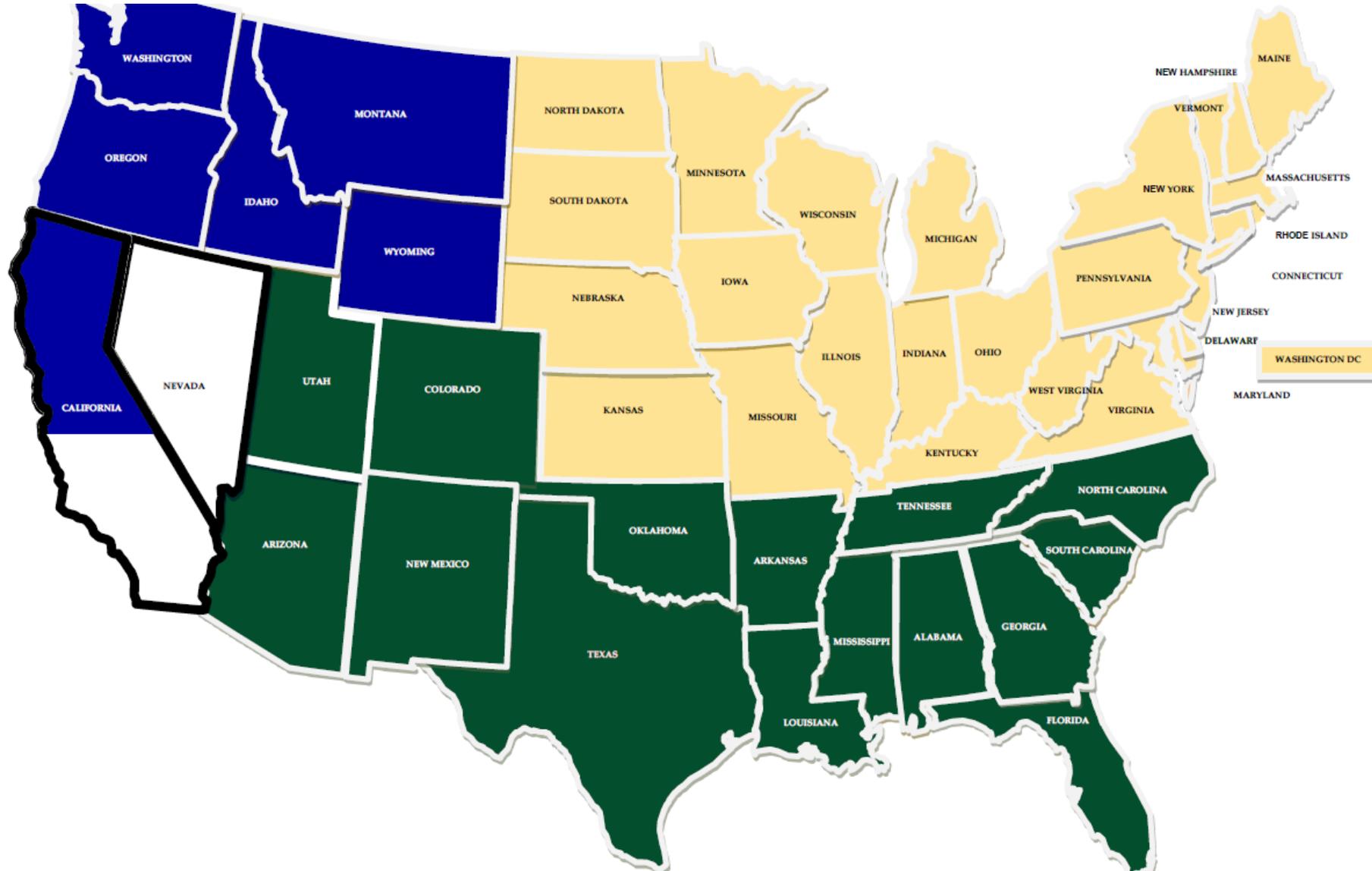
Goal

- ✓ Sales Leads
- ✓ Conversion
- ✓ New Business
- ✓ Stretch Goal

Recommended Target

- 🎯 725
- 🎯 25%
- 🎯 35%
- 🎯 Converted New Business

Group Business Development Deployment



Inspiration Pays Off- *an incentive worth* **\$20,000**

In Monterey County, Inspiration Meets Here

- Drive Larger Group= 1,000 RN's
- Increase to \$20,000 maximum
- Ongoing



2025 Co-Ops

BDE	Date	Description	Target Market Segment	Co-Op Cost	#
<i>JM/RH /KB</i>	<i>October 7-9, 2025</i>	<i>IMEX, Las Vegas (Rendezvous, Papi Steak Client Dinner)</i>	<i>Corporate</i>	<i>\$ 2,500</i>	<i>8</i>
<i>JM</i>	<i>November 17-19, 2025</i>	<i>LA/OC Sales Mission Bryan Adams & Sabrina Carpenter</i>	<i>Corporate</i>	<i>\$ 500</i>	<i>4</i>
<i>JM</i>	<i>December 10-12, 2025</i>	<i>SITE SoCal Holiday Event La Quinta, CA</i>	<i>Incentive</i>	<i>\$ 500</i>	<i>3</i>
<i>MP</i>	<i>December 16-17, 2025</i>	<i>CalSAE Seasonal Spectacular and Client Entertainment</i>	<i>Association/ Intermediary</i>	<i>\$ 850</i>	<i>6</i>

SAVE THE DATE

2026 Co-Ops

Type	BDE	Date	Description	Target Market Segment	Co-Op Cost	#
SM	JM	January 2026	Sacramento Sales Mission	Association	\$500	2
SM	KB	February 2026	Arizona Sales Mission	Third Party	\$500	5
TS + SM	KB	March 12-13, 2026	MIC Denver + Sales Mission	Corporate/Association	\$500	3
SM	KB	March 20-22, 2026	Texas Sales Mission (Dallas & Houston Rodeo)	Corporate	\$500	4
TS	JM	March/April 2026	MPI Northern California ACE	Corporate/Association	\$500	3
SM	RH	April 2026	Midwest Sales Mission & Destination Celebration	Corporate/Association	\$500	3
TS	JM/RH /KB	October 12-15, 2026	IMEX, Las Vegas (Rendezvous, Client Dinner)	Corporate	\$ 2,500	8
SM	JM	November 2026	LA/OC Sales Mission	Corporate	\$ 500	4
TS	JM	December 2026	SITE SoCal Holiday Event	Incentive	\$ 500	3
TS	MP	December 2026	CalSAE Seasonal Spectacular & Client Entertainment	Association/Intermediary	\$ 850	6
TS	DC	May 2026	IPW- Ft. Lauderdale	Travel Trade	\$2000	3



Marketing Communications Strategies

1. Extend **REACH** into New & Under-tapped Markets
2. Targeted Event Promotion & Development
3. Further Develop Regional Identities
4. Reinforce Key Content Pillars
5. Drive Demand in International & Luxury Segments



Marketing Communications Budget

Marketing Expense	FY2024-25 Reforecast	FY2025-26 Budget	Difference	% Chg	
Leisure Marketing	2,616,142	3,401,380	758,238	30%	Budget added to media to expand campaigns, grow reach, and enhance event promotion.
International Marketing	203,560	240,140	36,580	18%	Budget added to expand programming into Asia Pacific region.
Luxury Marketing	416,929	477,350	60,421	14%	Budget added to expand reach into luxury segment.
Public Relations	310,130	364,500	54,370	18%	Budget added to include brand and media partnership opportunities and culinary events.
Agency Fees	393,000	456,456	63,456	16%	Budget added to account for contracted agency fee increases, inclusion of every-other-year All Agency Meeting and event development agency.
Marketing Operations	636,457	673,855	37,398	6%	Budget added for additional research studies and data purchase.
Total Marketing Expense	4,576,219	5,613,681	1,037,462	23%	

Marketing Communications Goals



Goal

- ✓ Engaged Web Sessions
- ✓ Engaged Social Growth
- ✓ Intent to Visit



Recommended Target

- 🎯 1M sessions* (-23% YOY)
- 🎯 22K new followers (+8% YOY)
@ 6% average engagement
- 🎯 4.3

*Revisit at Mid-Year

Expanding Reach

Rising to the top:

- Chicago
- Houston or Austin
- Washington DC
- Atlanta
- Miami/Ft Lauderdale

**Continued investment in current
Drive & Fly markets.**



Regional Identities: Creating Extraordinary Experiences

- Expand digital content to highlight the unique appeal of each area
- Leverage AI trip planner to personalize itineraries and connect regions
- Integrate interactive maps to showcase local attractions, parks, and businesses
- Create social and digital content to reinforce regional branding



International Strategy

Target Markets

- UK
- Mexico
- Canada
- Asia TBD

Marketing

- Direct-to-consumer advertising through co-ops
- Continued PR representation in UK
- Media Missions and activity in other markets

Travel Trade

- Continued Trade representation in UK
- Stay the course
- Look into Pac Rim representation mid-year

Luxury Strategy

MARKETING

- “Seek & Find” advertising campaign
- IMM Luxury media event
- Targeted brand partnership
- Focused media and Influencer hosting

BUSINESS DEVELOPMENT

- Luxury network partnerships
- ILTM attendance
- Regional Luxury Travel Agent Activations





BOARD MEMBER ANNOUNCEMENTS



GOOD OF THE
ORDER



NEXT MEETING
MARKETING: OCT. 15
SALES: OCT. 16