

January 8, 2026

# SEE MONTEREY MCTID COMMITTEE

SEE  
MONTEREY





# PUBLIC COMMENT



# STAFF ANNOUNCEMENTS

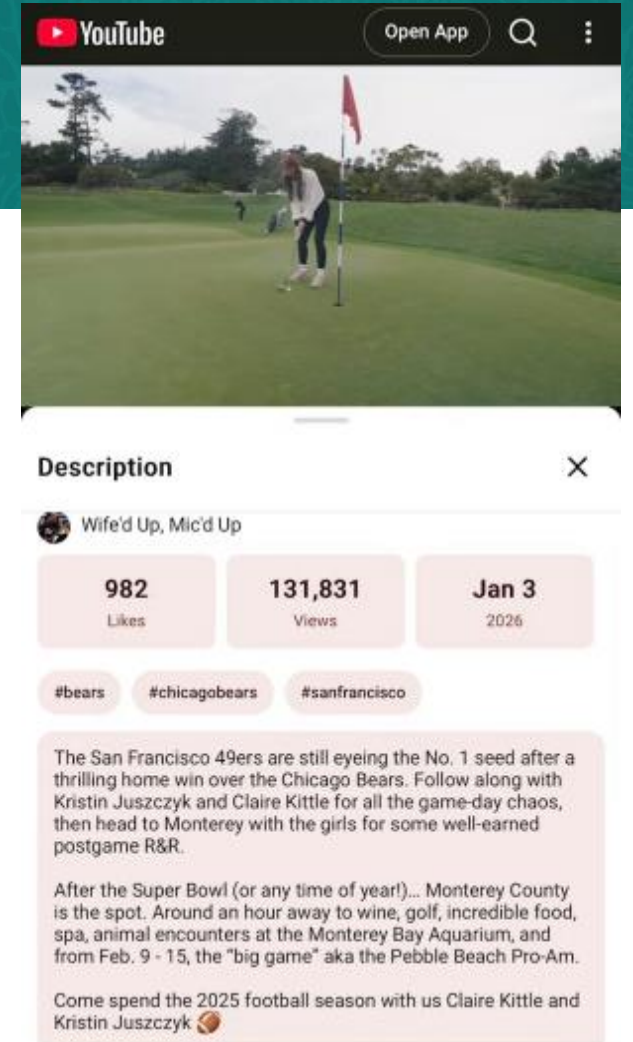
# STAFF ANNOUNCEMENTS

## Hiring Updates:

Dawn Mathes – Park  
VP of Marketing & Community Relations



# SUPER BOWL > AT&T PEBBLE BEACH PRO-AM





# SPECIAL PRESENTATION: MONTEREY REGIONAL AIRPORT



# Monterey Regional Airport

THE EASY AND CONVENIENT WAY TO TRAVEL

# MONTEREY PENINSULA AIRPORT DISTRICT

## (MPAD)

- Public Agency formed in 1941 by the California Legislature as an Independent Special District to own and operate the Monterey Regional Airport (MRY)
- Not affiliated with any other governing body and has all authority of a city or municipality
- Fully self-sufficient enterprise fund operation
- Generate all revenues through fees and charges for on-Airport activities
- Responsible for public safety on Airport property, including infrastructure, maintenance, property management, and police and fire protection

# BENEFITS TO THE REGION

- MRY provides access to the movement of goods and services, and transports residents and visitors during diverse situations
  - Medical emergency services
  - Serve as a lifeline during emergencies
    - Evacuation
    - Fire fighting
    - Urgent relief with supply delivery
  - Community structural fire support (on-Airport ARFF facility)
  - Alternative to regional vehicular travel
  - Economic Development: The local economy thrives on the presence of consistent air service. Businesses large and small depend on reliable flights

Regulatory OVERSIGHT by DOT, FAA, TSA, Caltrans division of aeronautics

# **About MRY Air Service**

**MONTEREY REGIONAL AIRPORT**

# NATIONAL PLAN OF INTEGRATED AIRPORT SYSTEMS (NPIAS)

20,000 US Airports

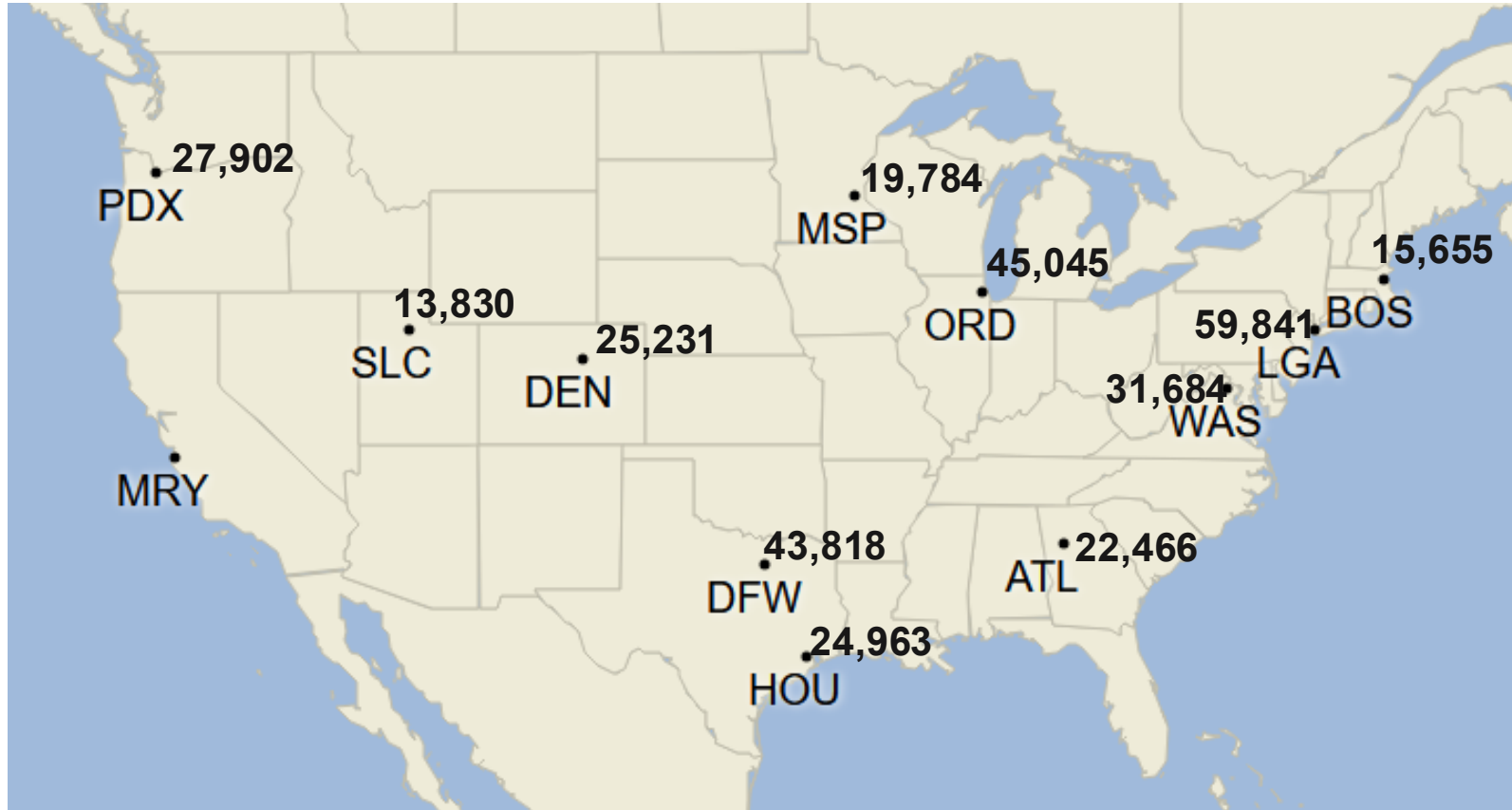
**3,300 NPIAS Airports**, Commercial Services, Reliever and Selected GA

**California** has 882 Airports, 245 Public Use (**188 NPIAS** **23** Commercial Service) (637 private)

-  3 large hub (over 1% of US PAX)- Los Angeles (LAX), San Diego (SAN), [**San Francisco**](SFO)
-  6 Medium hub (.25-1%) –Burbank (BUR), [**Oakland**] (OAK), Ontario (ONT), Sacramento (SMF), [**San Jose**] (SJC), Santa Ana (SNA)
-  4 Small hub (.05-.25%) - Fresno (FAT), Long Beach (LGB), Palm Springs (PSP), Santa Barbara (SBA)
-  10 NON hub (less than .05%) – Arcata/Eureka (ACV), Bishop (BIH), Meadows Field (BFL), **Monterey (MRY)**, Redding (RDD), San Bernardino (SBD), Santa Maria (SMX), San Luis Obispo (SLO), Sonoma County (STS), Stockton (SCK)

# TOP VISITOR MARKETS TO MONTEREY REGION: TOP MARKETS ARE FROM LARGE CITIES IN EASTERN ½ OF U.S.

## Annual Visitors (2024) by Metropolitan Area



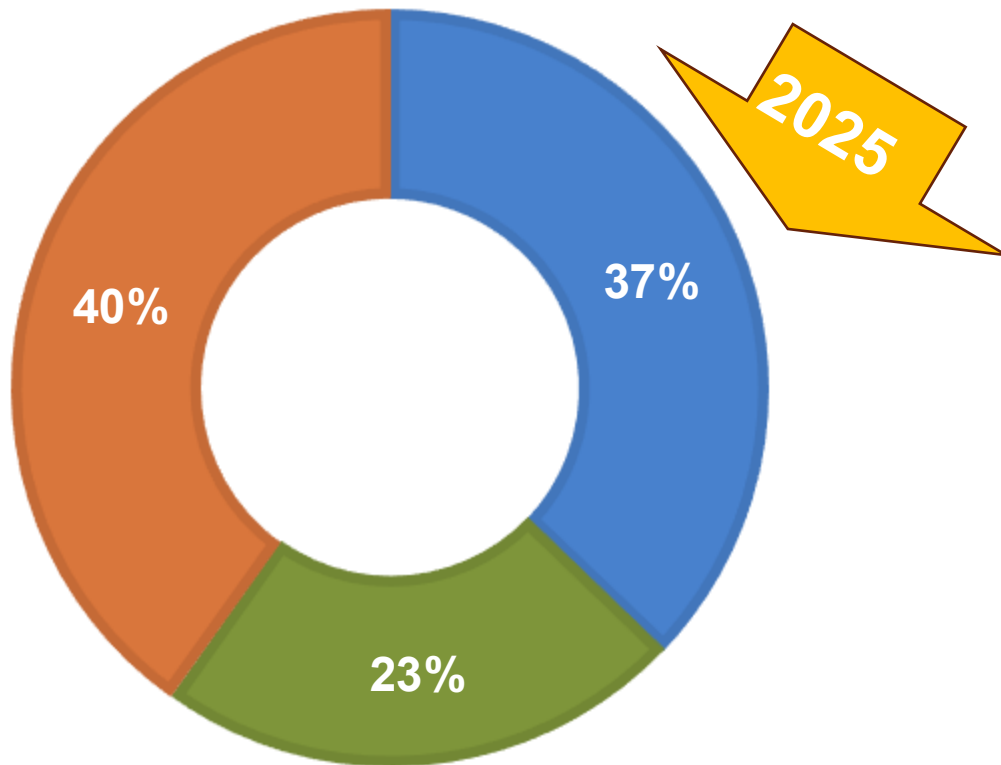
- Top visitor markets align with largest cities, with NYC #1.
  - 59,841 annually.
  - Or 164 daily visitors.
- Chicago: 45,045 annual visitors or averaging 123 daily.
- Washington, D.C.: 31,684 annual visitors or 87 daily.
- NYC, DC and Chicago are also 3 top migration markets to/from Monterey.

\* Source: PLACER.

# PASSENGER LEAKAGE

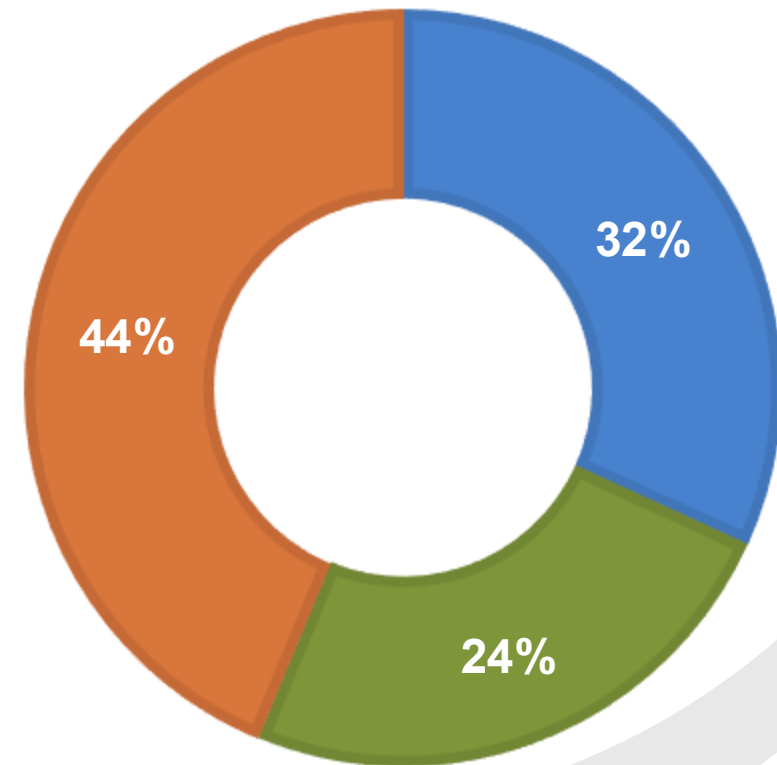
AIRPORT OF ORIGIN  
MAY 2025 (WITHIN 15 MILES)

■ MRY ■ SJC ■ SFO



AIRPORT OF ORIGIN  
MAY 2024 (WITHIN 15 MILES)

■ MRY ■ SJC ■ SFO



# NONSTOP DESTINATIONS

- 30 total combined arrivals and departures daily
- 9 nonstop destinations
  - With one stop connections across the world
- 4 commercial airlines
  - Alaska Airlines
  - Allegiant Air
  - American Airlines
  - United Airlines

**FLY NONSTOP**  
FROM MONTEREY  
with one-stop connections  
around the world.

**NEW ROUTE**  
STARTING  
SPRING  
2026

**FLY local  
FLY MRY**

MontereyAirport.com

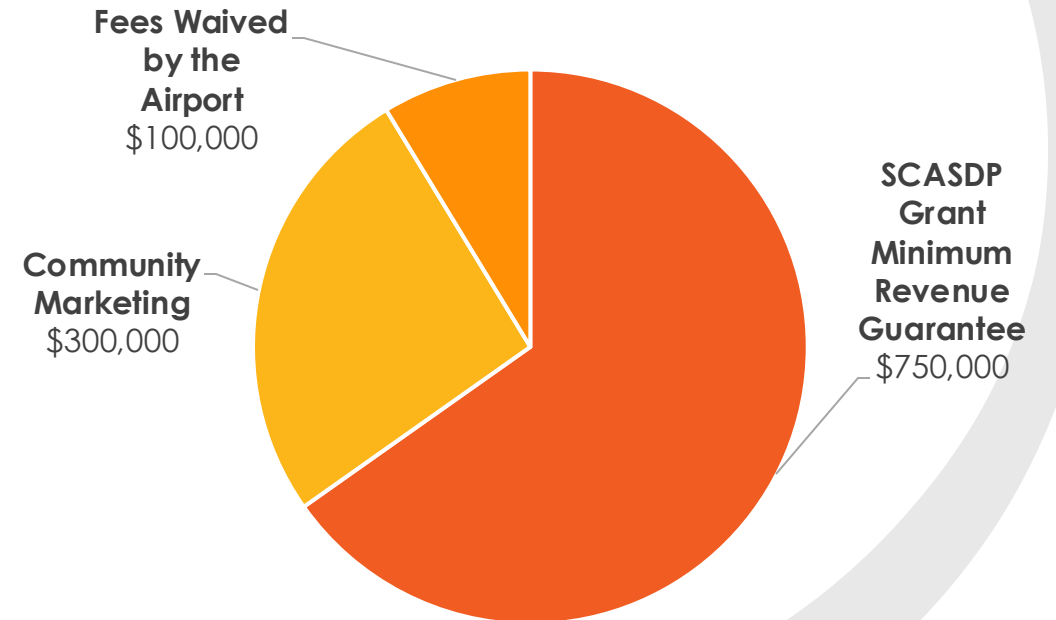
# COMMUNITY MARKETING SUPPORT

**See Monterey's and Visit Carmel's role in securing and sustaining air service**

It's not just about landing a route; it's about keeping it viable

Invest in every direct air-service market through ongoing campaigns

- Direct flight to Chicago, IL
- Pledged funding support of \$1,150,000




# INDUSTRY AIR SERVICE OPTIONS

- Minimum Revenue Guarantees (MRGs) are employed by the airline industry, **especially for smaller airports**, because they act as **financial safety nets, reducing risk for airlines starting new routes** by covering potential revenue shortfalls, thereby encouraging carriers to serve underserved markets, boost regional economic development, and maintain vital community connectivity for business, tourism, and essential travel.

## Importance for Airlines & Communities:

- Risk Mitigation: MRGs provide a financial cushion, protecting airlines from losses on new, unproven routes, which might otherwise be too risky to launch.
- Market Entry & Expansion: They help attract new service to smaller or regional airports and keep existing, valuable routes operational.

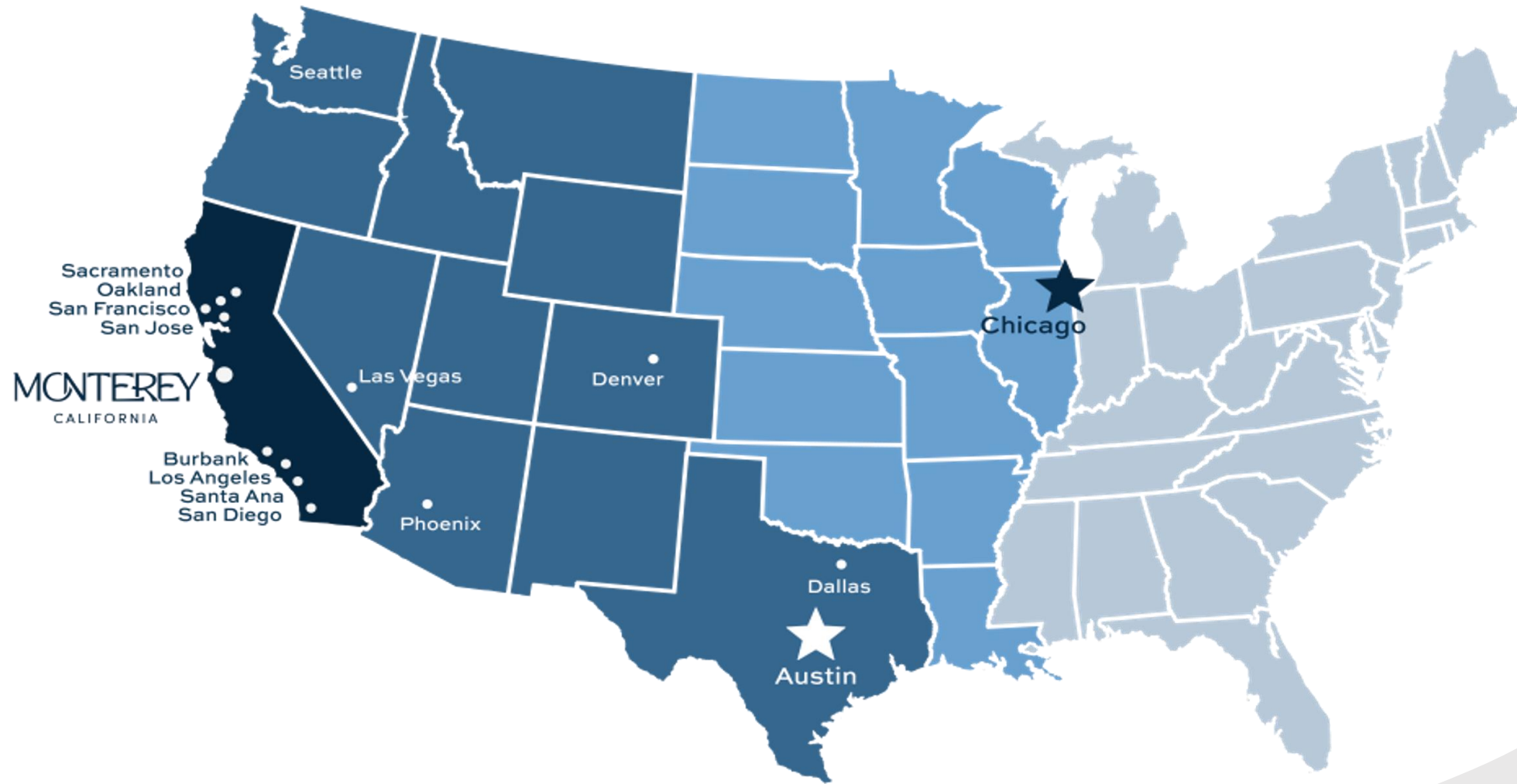
 **The FAA prohibits the use of airport revenue for airline subsidies, such as a minimum revenue guarantee.**

# INDUSTRY AIR SERVICE OPTIONS

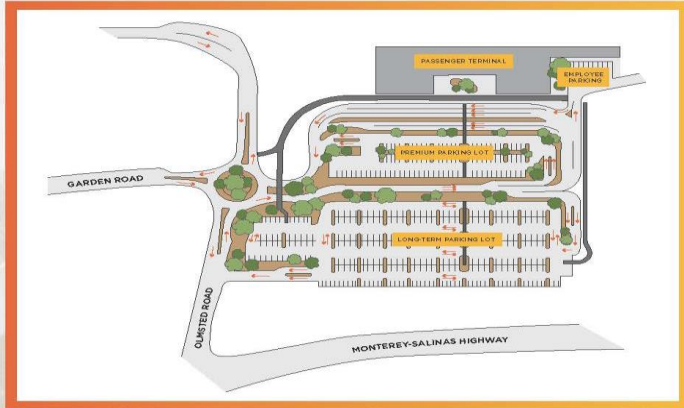
**MPAD adopted an Air Carrier Incentive Program – waive fees for 2 years.**

- Includes waiving landing fees (calculated by weight), apron fees, and remain overnight fees (RON).
  - For an existing carrier that increases seat capacity by 50% or more to an existing destination on a weekly basis, incentives are available only if the increase is sustained year-round. If the increase is limited to seasonal periods, any potential incentives will be prorated based on the percentage of seat growth and whether the increase is achieved through aircraft up gauging rather than frequency.
  - For new seasonal nonstop service by an existing carrier or new carrier, incentives are available for period specified in table. If the service transitions to year-round, year-round service incentives may be applied retroactively, totaling 24 months of eligibility.
  - For new year-round nonstop service by either an existing or new carrier, this incentive only applies to routes not currently served by another airline.

# COMMUNITY MARKETING SUPPORT






# PARKING & ACCESS



Roundabout at Olmsted Road and Garden Road will enhance traffic flow and reduce vehicle emissions.

## Improved roadway designs, including airport entrance roundabout

-  Reduce curbside congestion
-  Increase safety
-  440 public parking spaces



Scan the QR code to follow along!



[montereyairport.com/transform](https://montereyairport.com/transform)

**MRY** METAMORPHOSIS  
SAFETY ENHANCEMENT PROGRAM

Funding for the MRY Metamorphosis Safety Enhancement Program comes from grants and airport revenues, not local tax dollars.

# REPLACEMENT PASSENGER TERMINAL



*A modern and welcoming passenger terminal representing the beauty and charm of the Monterey region.*

## Transforming How Residents and Visitors Travel



Common-use ticketing and boarding gates



5 passenger boarding bridges



LEED Platinum certified (goal)



Scan the QR code to follow along!



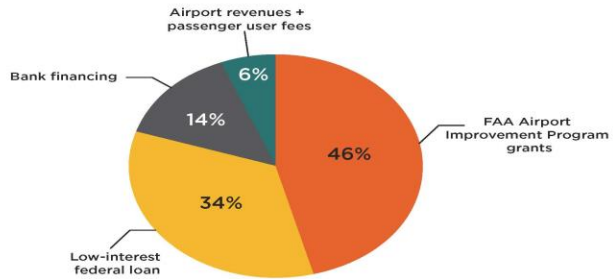
[montereyairport.com/transform](https://montereyairport.com/transform)

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# PROGRAM FUNDING

## Safety Enhancement Program Funding



Airport revenues include:

- Parking fees
- Landing fees
- Concessions and other tenant rents



State and local taxes are not funding the MRY Metamorphosis.

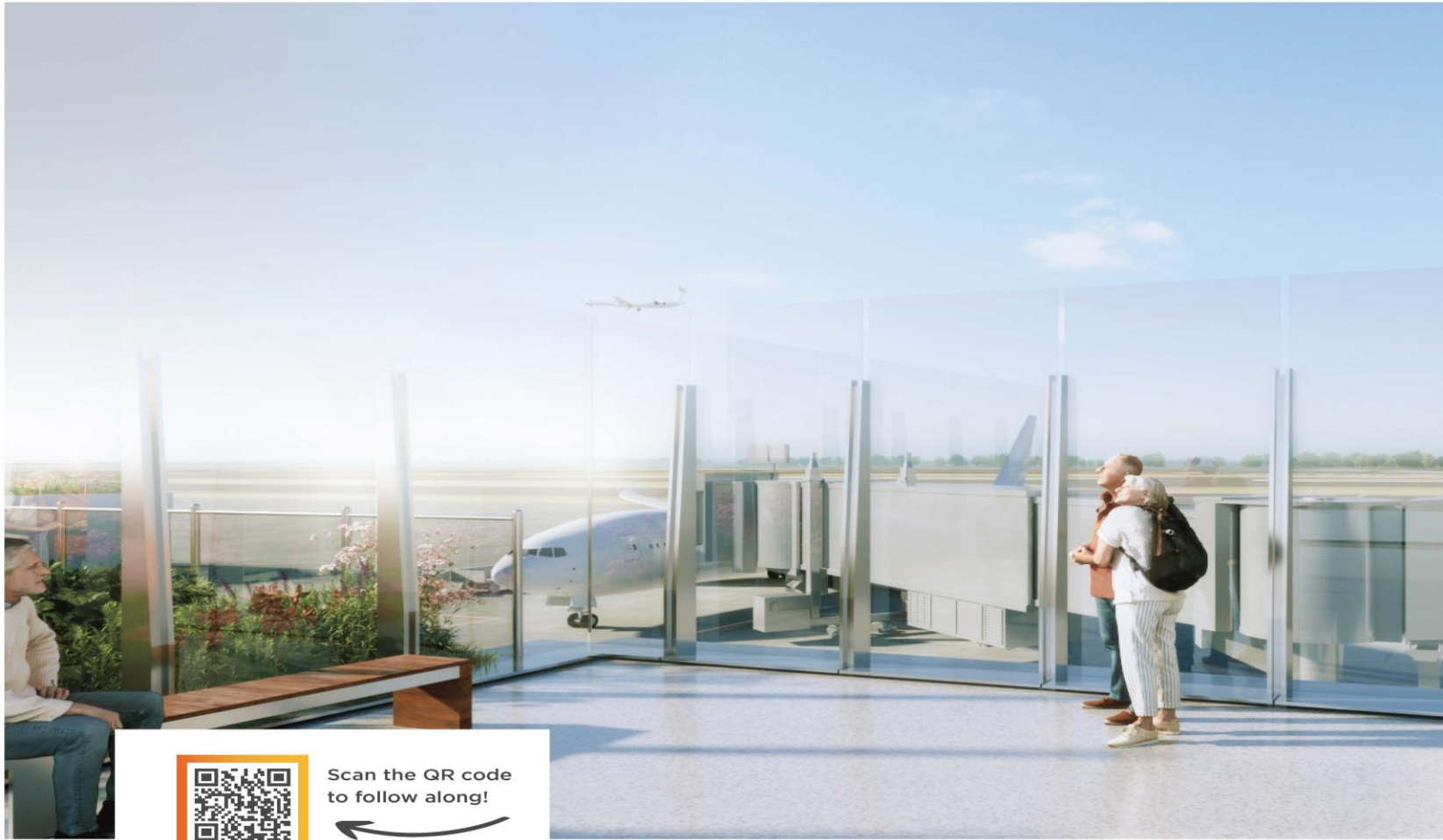


Scan the QR code to follow along!



[montereyairport.com/transform](https://montereyairport.com/transform)

# REPLACEMENT PASSENGER TERMINAL PROJECT OVERVIEW



## Replacement Terminal and Commercial Apron Overview

*The \$200+ million MRY Metamorphosis Safety Enhancement Program includes a replacement passenger terminal, roadway circulation and safety upgrades, and a new 440-space public parking lot.*



Similar terminal footprint – not an expansion



More accessible, sustainable, and convenient



Net zero carbon-ready building



New commercial aircraft apron

- Safe and efficient aircraft and personnel movement
- Envision sustainability certified



Local skilled jobs and economic benefits



Project completion in June 2027



Scan the QR code to follow along!



[montereyairport.com/transform](https://montereyairport.com/transform)

Funding for the MRY Metamorphosis Safety Enhancement Program comes from grants and airport revenues, not local tax dollars.

**MRY** | METAMORPHOSIS  
SAFETY ENHANCEMENT PROGRAM



**Thank you!**

**FLY LOCAL. FLY MRY.**



# CONSENT AGENDA

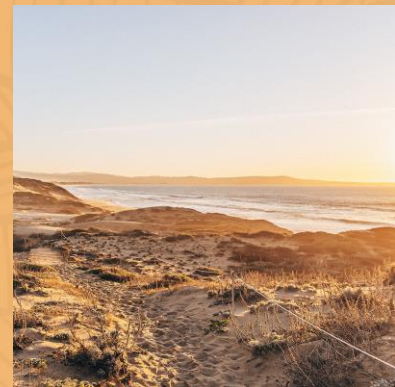
# Consent Agenda

1

**Minutes of the June 12, 2025  
MCTID Oversight Meeting**

*Recommended Action: Approve the  
draft minutes as presented.*





# REGULAR AGENDA

REGULAR AGENDA

# A. MARKET BUSINESS UPDATE



# STR DATA YTD THRU NOVEMBER 2025

	Occ	YOY	ADR	YOY	RevPAR	YOY
City of Monterey, CA+	72.2%	▲ 3.9%	\$240	▲ 0.1%	\$173	▲ 4.0%
Monterey County, CA+	69.7%	▲ 2.5%	\$270	▼ -0.5%	\$188	▲ 2.0%
Napa County, CA	66.3%	▲ 3.0%	\$429	▲ 0.9%	\$284	▲ 3.9%
San Francisco/San Mateo, CA	70.1%	▲ 5.4%	\$228	▲ 6.1%	\$160	▲ 11.8%
San Luis Obispo County, CA	66.5%	▲ 1.1%	\$192	▼ -0.4%	\$128	▲ 0.7%
Santa Barbara/Santa Maria, CA	67.8%	▼ -1.1%	\$256	▲ 1.6%	\$174	▲ 0.6%
Sonoma County, CA	61.2%	▼ -1.5%	\$214	▼ -1.9%	\$131	▼ -3.4%

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

Source: STR

## OCCUPANCY GROWTH

MRY +2.5%

SF +5.4%

NAPA +3.0%

## OCCUPANCY DECLINE

SB -1.1%

SONOMA - 1.5%

# STR DATA YTD THRU NOVEMBER 2025

	Occ	YOY	ADR	YOY	RevPAR	YOY
Cannery Row+	79.3%	▲ 3.7%	\$374	▲ 0.1%	\$296	▲ 3.8%
City of Monterey, CA+	72.2%	▲ 3.9%	\$240	▲ 0.1%	\$173	▲ 4.0%
Full Service+	74.2%	▲ 4.0%	\$300	▲ 0.2%	\$222	▲ 4.2%
Group properties+	73.9%	▲ 3.9%	\$445	▼ -1.7%	\$329	▲ 2.2%
Limited+	68.1%	▲ 2.3%	\$171	▲ 1.1%	\$117	▲ 3.4%
Luxury+	75.2%	▲ 1.8%	\$912	▼ -3.7%	\$686	▼ -2.0%
Monterey County, CA+	69.7%	▲ 2.5%	\$270	▼ -0.5%	\$188	▲ 2.0%

History for submarkets varies. Click on a submarket to check its history in the line charts

Source: STR

## OCCUPANCY GROWTH

LTD SERVICE +2.3%  
FULL SERVICE +4.0%  
LUXURY +1.8%

# Hotel Performance by Period

Monterey County, CA+ (12/25/2025 - 1/1/2026)

Location: Monterey County, CA+  
Measure Selector: Occupancy

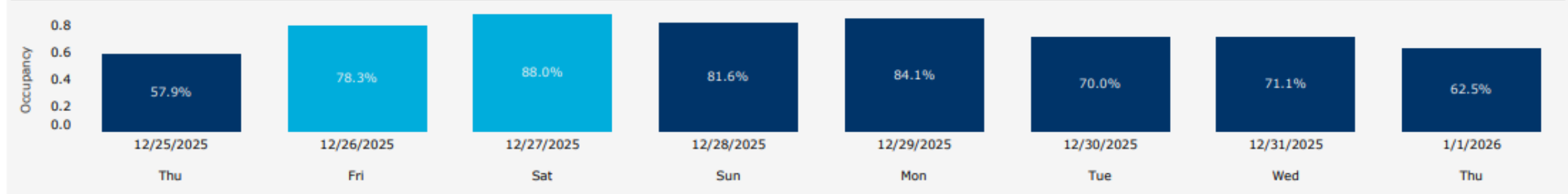
**Selected Period**  
From: 12/25/2025  
To: 1/1/2026

**Comparison Period**  
From: 12/25/2024  
To: 1/1/2025

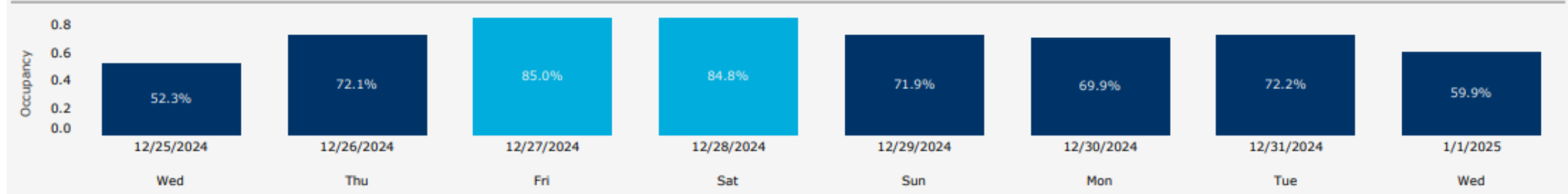


Weekend Weekday

Selected Period	Occupancy	ADR	RevPAR	Supply	Demand	Revenue
(12/25/2025 - 1/1/2026)	<b>74.2%</b>	<b>\$239.09</b>	<b>\$177.37</b>	<b>99.6K</b>	<b>73.9K</b>	<b>\$17.7M</b>



Comparison Period	Occupancy	ADR	RevPAR	Supply	Demand	Revenue
(12/25/2024 - 1/1/2025)	<b>71.0%</b>	<b>\$228.95</b>	<b>\$162.57</b>	<b>99.9K</b>	<b>70.9K</b>	<b>\$16.2M</b>



% Change	Occupancy	ADR	RevPAR	Supply	Demand	Revenue
(12/25/2025 - 1/1/2026) vs. (12/25/2024 - 1/1/2025)	+4.5%	+4.4%	+9.1%	-0.3%	+4.2%	+8.8%

# WEEKLY DATA THRU - December 27, 2025

## STR WEEKLY DA TA – YoY Comparison

- Occupancy at 68.5% (+2.9%)
- ADR: \$235.38 (+3.0%)
- Total Rooms Revenue: \$726.6M(+5.1%)

Market performance remains promising over YoY growth and relative to comp set

*But we need to keep the peddle to the metal!*

REGULAR AGENDA

# B. MCTID OVERSIGHT COMMITTEE OPEN POSITIONS UPDATE



# MCTID COMMITTEE MEMBERS

Committee Roster	TERM EXPIRY
John Turner, InterContinental The Clement (Monterey) CHAIR	2 Year Term – 6/30/26
Chris Sommers, Monterey Plaza Hotel & Spa (Monterey) Vice Chair	2 Year Term – 6/30/27
Kevin Ellis, Hyatt Regency Hotel & Spa (Monterey)	2 Year Term – 6/30/27
Janine Chicourrat, Portola Hotel & Spa (Monterey)	2 Year Term – 6/30/27
Stefan Lorch, Monterey Marriott (Monterey)	2 Year Term – 6/30/26
Tim McGregor, Inns of Monterey (Monterey)	2 Year Term – 6/30/26
Hartmut Ott (County of Monterey)	2 Year Term – 6/30/26
Donna Langley, Pebble Beach Company (County of Monterey)	2 Year Term – 6/30/27
Vacant (County of Monterey)	
Vacant (County of Monterey)	
Amrish Patel, Green Lantern Inn (Carmel-by-the-Sea)	2 Year Term – 6/30/26
Open (Seaside)	
Harvey Dadwal, Holiday Inn Express (Salinas)	2 Year Term – 6/30/27
Sylvain Briens (Marina)	2 Year Term – 6/30/27
Open (Pacific Grove)	2 Year Term – 6/30/27

# MCTID OPEN POSITIONS

## **Seaside**

- 1 open position
- Dale Johnson, Embassy Suites

## **Sand City- NEW SEAT**

- 1 open position
- Fady Hanna, Courtyard & Residence Inn

## **Pacific Grove**

- 1 open position
- Alex Marin, Asilomar Conference Grounds

## **County of Monterey**

- 2 open positions
- Bob Lambert, Carmel Mission Inn
- Colin Twohig, Big Sur River Inn

REGULAR AGENDA

# C. SEE MONTEREY MAJOR INITIATIVES & EVENT STRATEGY



# MAJOR INITIATIVES

- HWY 1 Reopening
- Super Bowl/AT&T
- Monterey 1000
- Arts Tourism – Off the Canvas
- Chicago – New Flight
- FIFA



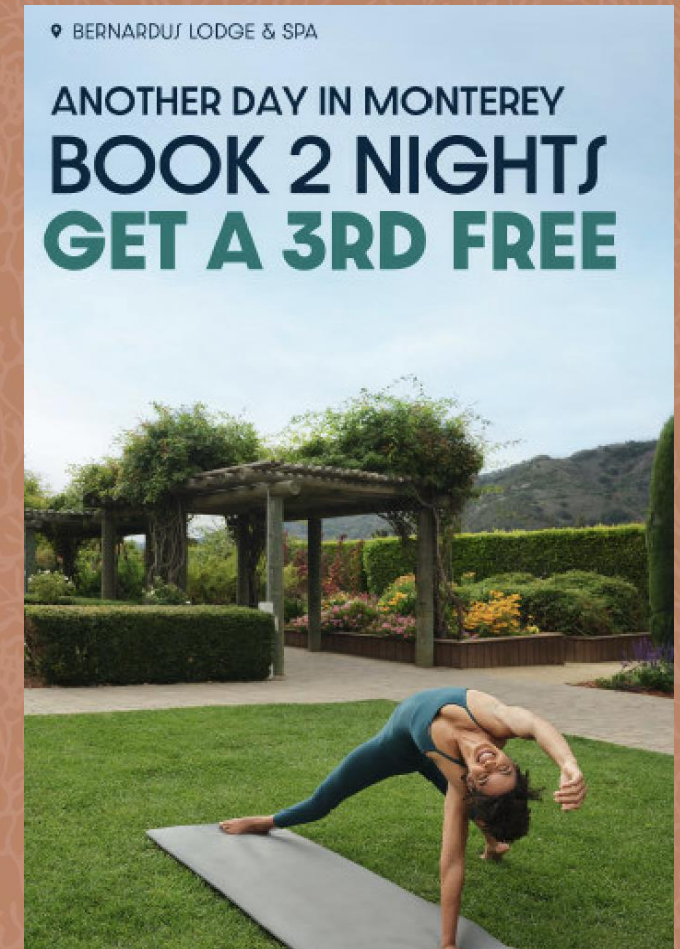
# ANOTHER DAY PROMO FALL 2025

## Spring Results

- 13 hotels | **\$900K economic impact**
- 7:1 ROI on campaign spend

## Fall Campaign

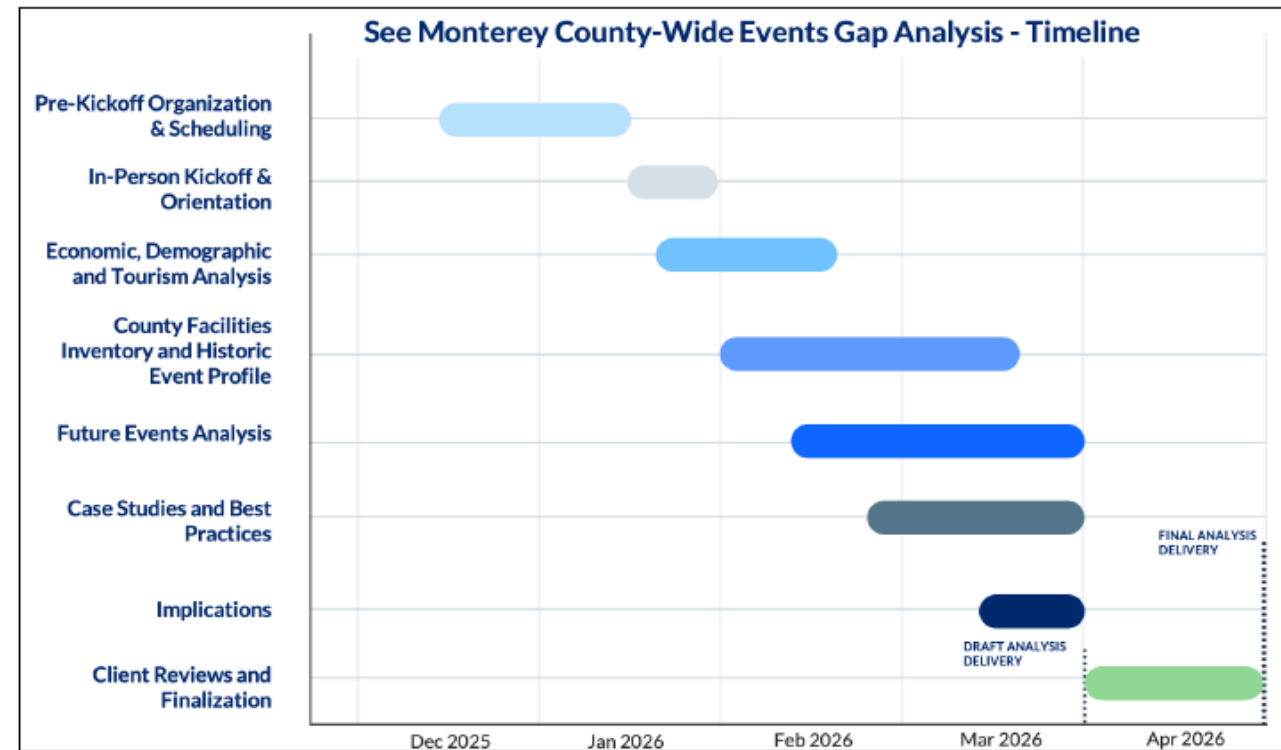
- **Hotels:** 22, ranging from Limited to Lux
- **Book:** Oct 1 - Dec 31, 2025- EXTENDED 3/31/26
- **Stay:** Nov 1, 2025 - Mar 31, 2026
- **Offer:** “Third Night Free”
- **Strategy:** Paid social + dedicated newsletters (TravelZoo, SF Chronicle & VCA)
- **Participants:** 22 hotels



# EVENT STRATEGY- County Wide Events Gap Analysis - Moving forward

Goal – evaluate/identify opportunities to develop existing/attract new events

- Formed Event Task Force
- Hired Hunden Partners
- Onboarding now
- Presentation and Kick Off at January Board Meeting
- Final Analysis Completed April 2026





# COMMITTEE MEMBER ANNOUNCEMENTS



GOOD OF THE  
ORDER



NEXT MEETING OF  
THE MCTID:  
APRIL 2, 2026  
*ADJOURNED*