

October 15, 2025

# SEE MONTEREY MARKETING COMMITTEE



MONTEREY  
FIND YOUR WAY HERE™

01



PUBLIC COMMENT



02

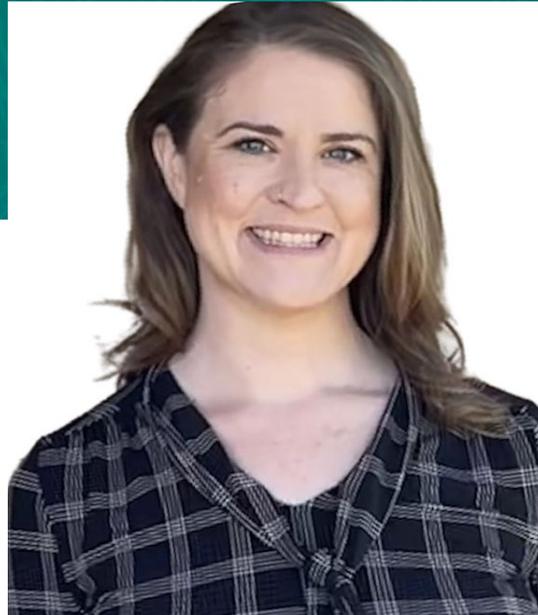


MEMBER AND  
STAFF  
ANNOUNCEMENTS

# NEW HIRES



**Jennifer Chiesa**  
Director of  
Public Relations



**Erin Burd**  
Content  
Manager



**Mackenzie Fisher**  
Marketing  
Coordinator



**Zeke Ramsell**  
Senior Business  
Development  
Executive  
(SF Bay Area)

# MARCOMM OUT & ABOUT



**VOICES CARRY**  
CALTRAVEL SUMMIT  
NORTH LAKE TAHOE  
OCTOBER 6-8, 2025

**IMEX**  
LAS VEGAS OCTOBER 7-9 2025

**IMMLUX**  
A TRAVMEDIA EVENT  
HOST CITY  
*Las Vegas*  
**IMM LUX**  
The Event Connecting  
Luxury Brands and Media

# 2025 POPPY AWARDS

## Submitted for :

- *HOW 2 HWY 1* - Best Public Relations Campaign
- *Find Your Way Here* - Best Brand Advertising Campaign
- *Road Trip Series* - Best Content Marketing
- *The Points Guy* - Best Media Activation



# MONTEREY COUNTY AWARDS

Condé Nast  
**Traveler**

## 20 Best Hotels in Northern California



## 12 Best Resorts in Northern California



## 25 Best Resorts in California



**Monterey Conference Center receives Bronze Medal for Best Conference Center**

**See Monterey wins "Best DMO/CVB"**



COURTYARD<sup>®</sup>  
BY MARRIOTT  
Residence INN<sup>®</sup>  
BY MARRIOTT

 SAND CITY

 PACIFIC GROVE

KIMPTON  
HOTELS & RESTAURANTS



## Trusted by over 5,000 purpose-driven boards

From community healthcare providers to credit unions, BoardEffect has empowered thousands of not-for-profit organizations to enhance their governance processes, streamline meetings and drive effective collaboration across the board.

“

We used to spend much more time preparing board materials. Now the process is much quicker

Joann Cragoe

Executive Assistant, American Public Media



**BoardEffect**

a Diligent brand

# MEMBER ROUNDTABLE



- Reintroduce yourself
- How was your summer business?
- What are your current marketing activities for the fall season? Holidays?
- Updates on upcoming events?

**Please keep updates to 2 minutes**



03



CONSENT AGENDA

# CONSENT AGENDA



**A**

**Minutes of the July 23, 2025 Joint  
Marketing & Sales Committee**

*Recommended Action: Approve minutes  
as presented*

**B**

**Monthly Reports**

*Recommended Action: Receive Q1 (July  
- September) Reports*

04



REGULAR AGENDA

# REGULAR AGENDA



## A

### **Q1 Results and Business Plan Updates**

*Recommended Action: Receive presentation and review Q1 results and highlights. Provide See Monterey staff with feedback.*

## B

### **Review Current and Future Marketing Communications Initiatives**

*Recommended Action: Receive presentation. Provide See Monterey staff with feedback.*

New Business

# A. Q1 RESULTS AND BUSINESS PLAN UPDATES



# MARKET UPDATE



# MONTEREY COUNTY DATA - YTD AUGUST 2025

## Jan - Aug 2025, Submarket Hotel Performance vs. Previous Year

	Occ	YOY	ADR	YOY	RevPAR	YOY	Total Supply	YOY	Rooms Sold	YOY	Room Revenue	YOY
Cannery Row+	78.6%	▲ 3.5%	\$379	▼ -0.3%	\$298	▲ 3.2%	184.9K	▼ -0.4%	145.4K	▲ 3.1%	\$55.1M	▲ 2.7%
City of Monterey, CA+	72.7%	▲ 5.0%	\$244	▼ -0.3%	\$177	▲ 4.7%	1.1M	▲ 0.0%	833.8K	▲ 4.9%	\$203.5M	▲ 4.6%
Full Service+	74.4%	▲ 5.1%	\$305	▼ -0.5%	\$227	▲ 4.6%	776.1K	▼ -1.0%	577.2K	▲ 4.0%	\$175.8M	▲ 3.6%
Group properties+	73.7%	▲ 4.2%	\$437	▼ -3.0%	\$322	▲ 1.0%	1.0M	▲ 0.1%	738.4K	▲ 4.3%	\$322.8M	▲ 1.2%
Limited+	68.6%	▲ 2.8%	\$174	▲ 1.9%	\$119	▲ 4.8%	1.9M	▼ -0.1%	1.3M	▲ 2.7%	\$225.4M	▲ 4.6%
Luxury+	74.1%	▲ 1.4%	\$860	▼ -6.4%	\$638	▼ -5.1%	251.7K	▲ 0.7%	186.6K	▲ 2.1%	\$160.5M	▼ -4.4%
Monterey County, CA+	70.1%	▲ 3.1%	\$268	▼ -1.3%	\$188	▲ 1.8%	3.0M	▼ -0.3%	2.1M	▲ 2.8%	\$569.1M	▲ 1.5%

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

Source: STR

Overall County Occupancy  
70.1% (+3.1% YOY)

City of Monterey 72.7%  
(5% growth YOY)

# COMPETITIVE DATA - YTD AUGUST 2025

Jan - Aug 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+	72.7%	▲ 5.0%	\$244	▼ -0.3%	\$177	▲ 4.7%	1.1M	▲ 0.0%	833.8K	▲ 4.9%	\$203.5M	▲ 4.6%
Monterey County, CA+	70.1%	▲ 3.1%	\$268	▼ -1.3%	\$188	▲ 1.8%	3.0M	▼ -0.3%	2.1M	▲ 2.8%	\$569.1M	▲ 1.5%
Napa County, CA	64.7%	▲ 3.2%	\$412	▲ 0.3%	\$267	▲ 3.5%	1.3M	▼ -0.1%	836.1K	▲ 3.2%	\$344.6M	▲ 3.4%
San Francisco/San Mateo, CA	69.1%	▲ 5.0%	\$222	▲ 3.7%	\$153	▲ 8.8%	13.5M	▼ -0.2%	9.3M	▲ 4.8%	\$2.1B	▲ 8.6%
San Luis Obispo County, CA	67.4%	▲ 2.2%	\$194	▼ -0.3%	\$130	▲ 1.9%	2.5M	▲ 1.7%	1.7M	▲ 3.9%	\$331.7M	▲ 3.6%
Santa Barbara/Santa Maria, CA	68.2%	▼ -0.4%	\$253	▲ 1.5%	\$173	▲ 1.1%	2.6M	▼ -0.1%	1.8M	▼ -0.5%	\$453.7M	▲ 1.0%
Sonoma County, CA	60.7%	▼ -1.4%	\$211	▼ -1.0%	\$128	▼ -2.4%	1.9M	▲ 1.2%	1.2M	▼ -0.2%	\$246.2M	▼ -1.2%

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

Source: STR

Napa and SLO up in Occ  
 Santa Barbara and Sonoma  
 down

San Francisco Occupancy at  
 69.1% (+5% YOY)  
 Citywide Groups Returning

# FY 25-26 Q1 MARCOMM RESULTS REVIEW



# MARKETING

Metric	Goal	Q1 Stats	% To Goal
*Engaged Web Sessions	1,000,000	521,198	52%
<i>Organic Engaged Web Sessions</i>	<i>381,473 (FY24-25)</i>	<i>287,964 (FY25-26)</i>	<i>25% YoY</i>
MIM Engaged Web Sessions	175,000	34,349	20%
Website Impressions	54,000,000	17,000,000	31%
*Social Engagements	3,100,000	1,600,000	52%
<i>Organic Social Engagements</i>	<i>107,032 (FY24-25)</i>	<i>204,013 (FY25-26)</i>	<i>90% YoY</i>
Social Audience Growth	22,000	5,800	27%
*Partner Site Conversions	165,000	175,967	106%
Top Level Group Conversions	305	101	33%

***\*Will re-evaluate at mid-year***

# COMMUNICATIONS

Metric	Goal	Q1 Stats	% To Goal
Top 125 Outlets	55	25	45%
Referral Traffic from Earned Media	1,800	592	32%
Media Impact Score	14/20	15/20	n/a
Earned Media Impressions	2.25 billion	901,639, 525	40%

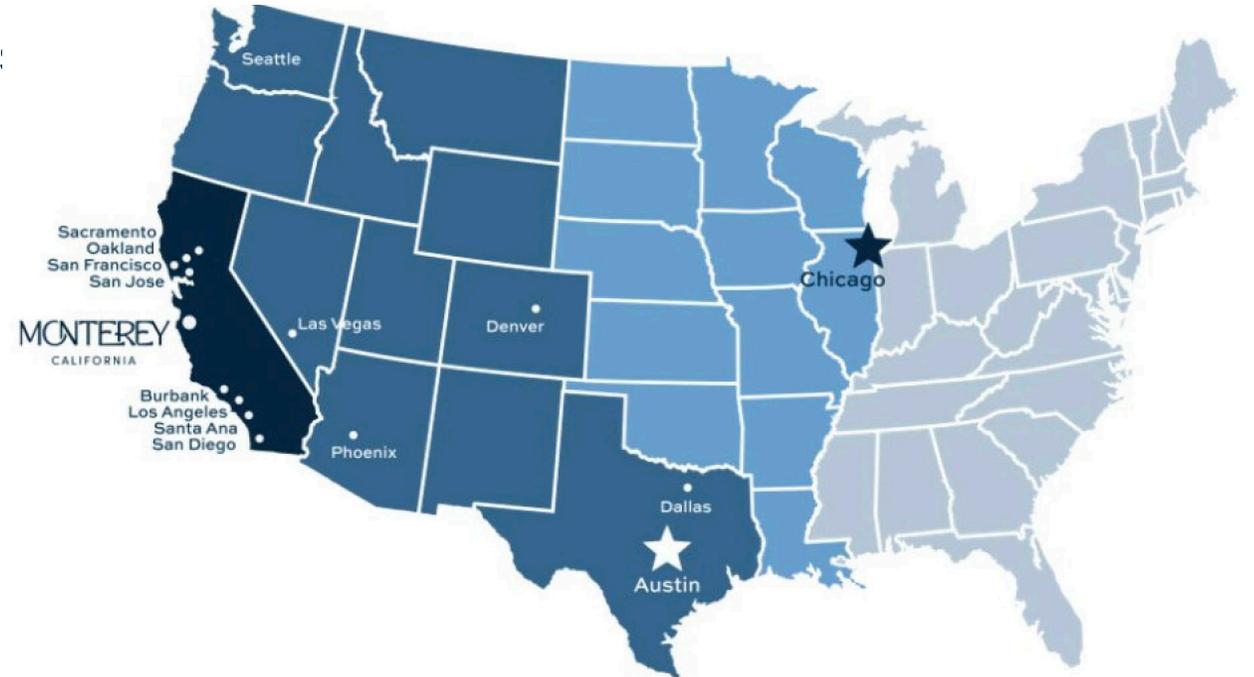
## TOP OUTLETS

AFAR	Fodor's	Forbes	HGTV	Lonely Planet
Meetings Today	Modern Luxury	Real Simple	Smart Meetings	Sunset Magazine
The Points Guy	The Quality Edit	Travel + Leisure	USA Today	Bay Area News Group
Los Angeles Times	KPIX/KRON/KTVU	New York Observer	PaperCity Magazine	Southern California News Group
Seattle Refined	Conde Nast Traveller UK	Independent	Roadbook	Wallpaper

# SWEEP TO THE EAST

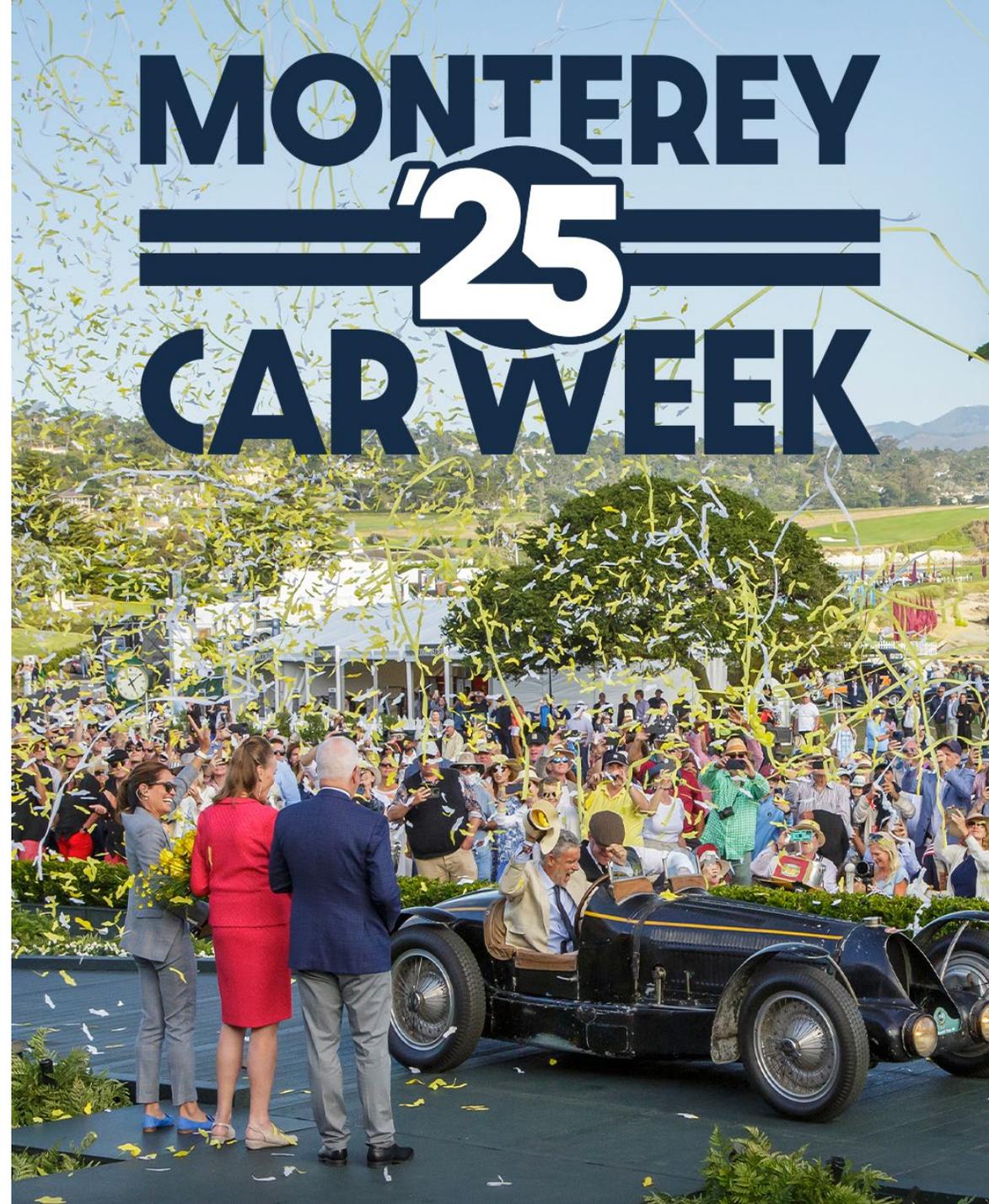
## STANDOUT STATS

- **Chicago:** +385% YOY in website visits (25.5K users)
- **Austin:** +55.8% YOY in website visits (1.7K users)
- Growing Chicago presence on social media: 10% of Instagram audience



# CAR WEEK STANDOUT STATS

- Nearly **70%** of all Q1 website traffic came from Car Week
- **175K+** engaged sessions during Car Week
- **+90%** vs. prior week
- **+20%** in average engagement time → deeper visitor actions
- Car Week homepage saw **20% more engaged sessions YOY**



# EARNED MEDIA STANDOUT STATS

- **105 media placements** secured in Q1
  - 25 placements in Top 125 Outlets
- **901 million impressions** year to date
- **592 clicks to SeeMonterey.com** meeting 32% of the annual target of 1,800.
- **7 media hosted** from outlets including *Good Morning America, San Francisco Chronicle, Harper's Bazaar UK* and others

PAPER  
CITY.



The  
SUNDAY POST

TRAVEL+  
LEISURE

the  
Quality  
Edit

New Business

# B. REVIEW CURRENT AND FUTURE MARKETING COMMUNICATIONS INITIATIVES



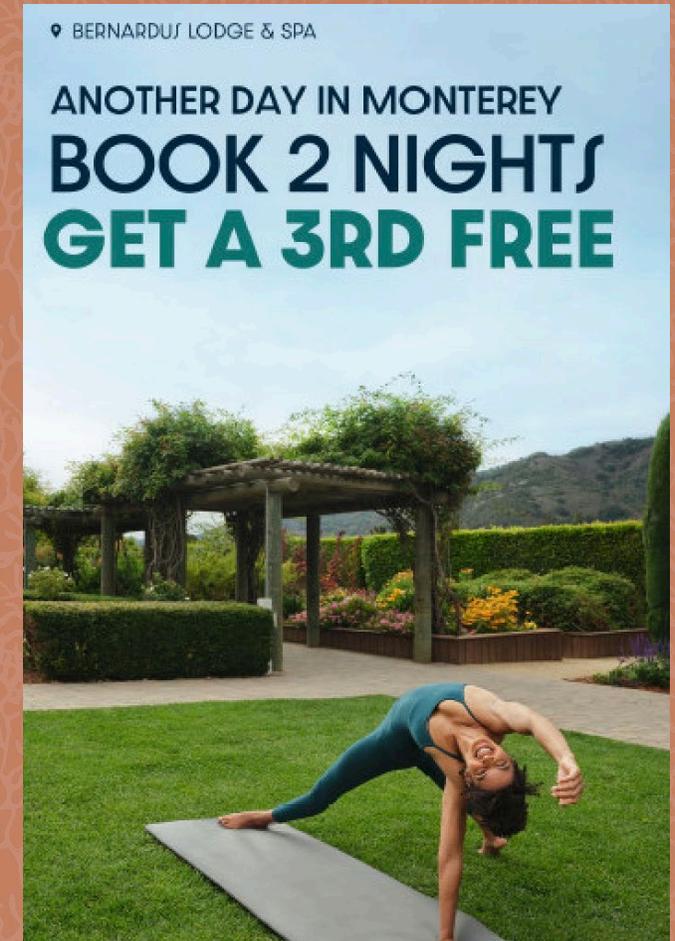
# ANOTHER DAY PROMO FALL 2025

## Spring Results

- 13 hotels | **\$840K economic impact**
- 7:1 ROI on campaign spend

## Fall Campaign

- **Book:** Oct 1 - Dec 31, 2025
- **Stay:** Nov 1, 2025 - Mar 31, 2026
- **Offer:** “Third Night Free”
- **Strategy:** Paid social + dedicated newsletters (TravelZoo, SF Chronicle & VCA)
- **Participants:** 22 hotels (still open to participants)



# INTERNATIONAL UPDATE

- U.S. inbound international visits projected to **decrease 6.3%** in 2025
- California inbound international visits projected to decrease **9.2% in 2025**
- Decreases impacted significantly by Canada
- Markets on the rise in CA:
  - Mexico +6/1%
  - Japan +4.9%
  - Italy +5.7%
  - China +2.4%
  - India +0.6%



# INTERNATIONAL MARKETING

- India Sales & Marketing Mission (Sept.)
- Brand USA Travel Week in London (Oct.)
- Canada CEO Mission (Nov.)
- IMM in NYC (Jan.)
- Mexico Sales & Media Mission (Feb.)
- IMEX Frankfurt (May)
- Evaluate Asia Pacific Market representation at mid-year



# MEETINGS & GROUP MARKETING

## Paid Media:

- Focus spend in proven partners and highlight incentive deal with increased return, up to \$20K!
- Allocate budget for strategic testing (e.g., SMERF, Business Journal, CVENT)

## Earned Media:

- Meetings Media FAM Nov. 16-20
- 3 confirmed to-date - *Smart Meetings*, *Prevue*, *California Meetings & Events*
- Hosting along side a Meeting Planner FAM to maximize exposure
- Media to meet with planners directly, which is a request we often receive from journalists

**BOLD IDEAS**  
**MEET**  
**BIG SAVINGS**

**SAVE UP TO \$20,000\***

**MONTEREY**  
MEETINGS

INSPIRATION MEETS HERE

\*Restrictions apply, full details at MeetInMonterey.com

# WINE COUNTRY MARKETING

- MCVGA dissolved, SLH Wine Artisans looking to help fill the gap
- \$500,000 CDFA Specialty Crop block grant to “*enhance the competitiveness of California specialty crops.*”
- Planned to increase awareness in Bay Area and drive traffic to Monterey County tasting rooms



# HISTORY & CULTURE PROGRAMMING

## Monterey 1000

- Celebrate and commemorate 1,000 years of Monterey County history
- Content development led by a small team of local “histography” experts
- Bite-sized, social-first content supported by website presence, PR and paid media partnership

## Arts Tourism

- Cast Monterey art, artists and the stories behind the art through a tourism lens
- Partner with Arts Council and others to highlight/promote what they are already doing



# AIRLIFT UPDATE

- Big Announcement on 10/23!
- Bring industry together to shore up marketing support for any new flights



# DISCUSSION: MEGA EVENT ACTIVATIONS



# EVENT STRATEGY

- Make existing events work harder
  - Laguna Seca Partnership
  - AT&T Pro AM Activation
- Attract and develop new events *when we need them*
  - Event Audit & Feasibility Study
  - Industry Task Force to support and guide
- Max out mega events
  - Superbowl connectivity to AT&T Pro AM
  - Bay Area FIFA World Cup Games



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

## Programming Ideas:

- **Advertising:** Add brand marketing to playoff markets in January
- **Influencer Partnerships:** Leverage NFL wives & girlfriends to position Monterey as the *(un)official* Super Bowl escape
- **Activation:** Tailgate Media Dinner
- **Coast of Champions Offer:** Launch themed hotel packages; align with 2026 Pro-Am ticket release
- **Where Champions Recharge:** Invite the *losing team* to “recover” in Monterey

who is going to win the 2026 superbowl in santa clara?

I can't say for sure who *will* win, but based on current betting odds and expert predictions:

- The **Kansas City Chiefs** are among the favorites at +650. FOX Sports +1
- The **Buffalo Bills** are also strongly in the mix, and some models (like Opta) actually give them the best odds to win. New York Post +2
- The **Baltimore Ravens** show up often in expert predictions as a dark-horse contender. NFL.com +1
- Some pundits favor the **Philadelphia Eagles**, citing their depth and proven roster. Scores And Stats +2

If I had to pick one based on the current info, I'd lean **Bills** or **Chiefs**, maybe tipping toward the **Bills** because of the supercomputer model backing them.

Do you want me to simulate a few matchups and give a “most likely” pick closer to game day?

       Sources

# FIFA WORLD CUP

## Programming Ideas:

- Engaging media vendors for targeted digital strategies

## Audience Focus

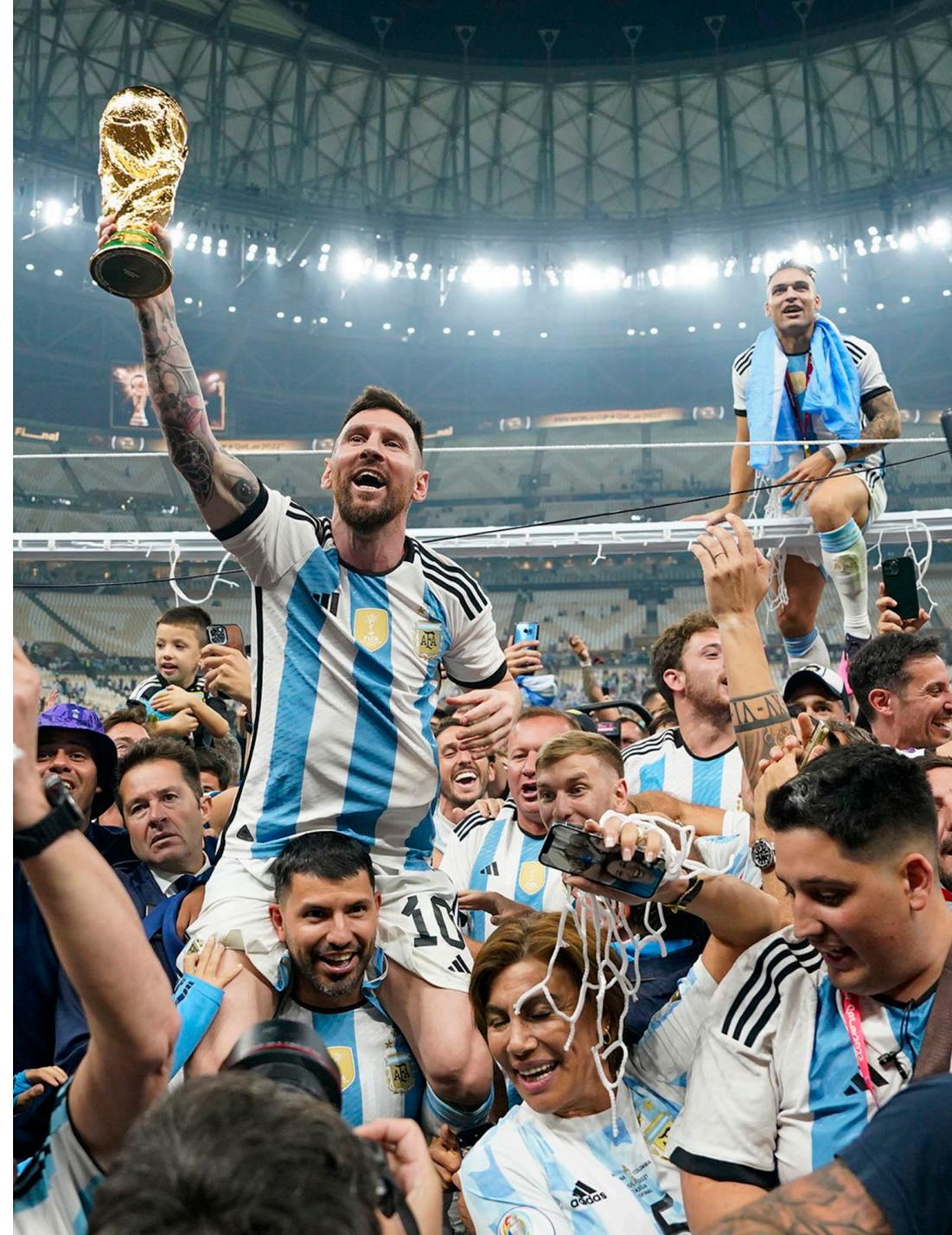
- World Cup travelers/intenders
- Luxury travelers seeking high-end experiences

## Strategy

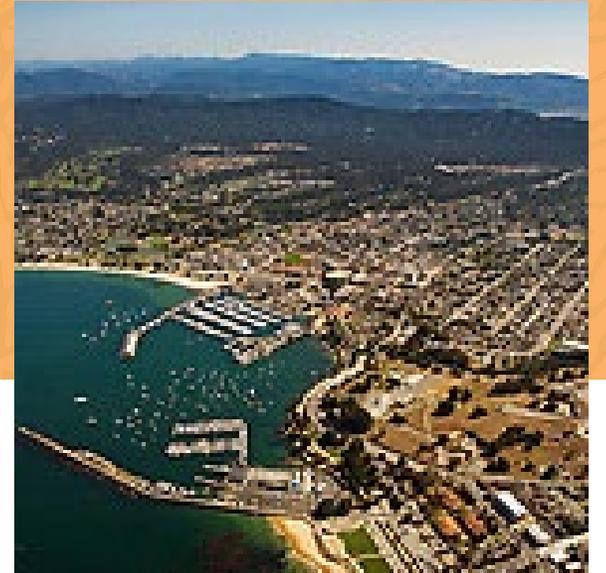
- Focused multi-media approach

## Goal

- Inspire this audience to extend their trip and visit Monterey County while in-destination



# DISCUSSION: REGIONAL IDENTITIES



# REGIONAL IDENTITIES CONTENT SERIES

## Found In Monterey County

- 14 regional videos
- 60-90 seconds each
- Will live on individual jurisdiction landing pages
- New footage + existing b-roll from satellite media tours & previous shoots
- All about the vibes

## One More in Monterey

- 5 multi-region videos featuring 3 – 4 locations each
- 30 seconds each with social cut downs
- If you had time for One More...
  - Bite
  - Sip
  - Wildlife Adventure
  - Story
  - Moment to relax

# REGIONAL VIBES



## Big Sur

Soulful. Breathtaking. Untamed.

- Here, nature's grandeur and the community's artistic soul combine to create an untamed path all your own.

## Monterey

Iconic. Historic. Trailblazing.

- With rich history, a world-class aquarium and fresh-off-the-boat seafood, this is where ocean and culture meet in unforgettable ways.

## Carmel Valley

Warm. Rustic. Relaxed.

- Sun-drenched hills and rolling vineyards with an upscale but laidback vibe invite you to slow down and savor.

## Carmel-by-the-Sea

Artistic. Whimsical. Epicurean

- A storybook brought to life, with hidden passageways and courtyards, whimsical cottages and an arts community that's thrived for over a century.

# REGIONAL VIBES



## Marina

Adventurous. Eclectic. Multicultural.

- This unpretentious town offers adventure sports, global dining and uninterrupted views that feel like your own slice of Monterey Bay.

## Moss Landing

Eco-Friendly. Nautical. Unhurried.

- The perfect blend of rugged heritage and natural wonder, offering both fresh-caught flavors and abundant wildlife just offshore.

## Pacific Grove

Nostalgic. Charming. Sanctuary.

- Nicknamed America's Last Hometown, this seaside town allows nature to guide a slower pace and small-town intimacy pairs with ocean horizons.

## Pebble Beach

Legendary. Luxurious. Pristine.

- Prestige with a view: championship fairways meeting the Pacific, premier hotel stays and a scenic road that feels like a private gallery of cypress and coastline.

# REGIONAL VIBES



## Salinas

Rooted. Story-Rich. Authentic.

- Famous as the hometown of John Steinbeck, this welcoming city celebrates its agricultural heritage and cultural diversity through immersive experiences and local flavors.

## Salinas Valley

Open. Abundant. Wine Country.

- Known as the “Salad Bowl of the World,” explore scenic country roads, sip award-winning wines and discover a place where heritage and harvest thrive side by side.

## Sand City

Edgy. Expressive. Creative.

- Murals climb concrete walls, art studios hum inside converted spaces and sand dunes press against the industrial fringe.

## Seaside

Bold. Genuine. Rising.

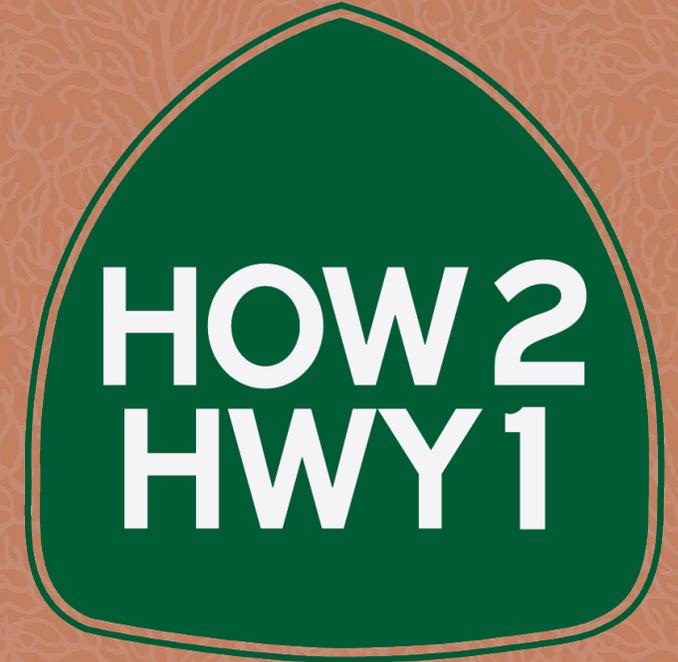
- Lively, youthful and proudly authentic, a gateway to Monterey Bay with stories still being written.

# DISCUSSION: HIGHWAY 1 REOPENING



# HIGHWAY 1 RE-OPENING

- Caltrans projects **full reopening by March 2026**
- Current closure is the **longest in history**
- Estimated **\$438M+ in losses** since 2023
- What kind of re-opening activation do we want to plan?



MONTEREY COUNTY

05



GOOD OF THE  
ORDER



06



NEXT MEETING OF  
THE COMMITTEE:  
JANUARY 26, 2026,  
JOINT MEETING



**Thank you!**