

April 14, 2026

SEE MONTEREY JOINT MARKETING & SALES COMMITTEE

MONTEREY
FIND YOUR WAY HERE™



PUBLIC COMMENT



STAFF ANNOUNCEMENTS

STAFF ANNOUNCEMENTS

OPEN POSITION:

Community
Relations Manager

MILESTONE ANNIVERSARIES

- David Cater- 12 years
- Marissa Reader- 11 years
- Joe Marcy- 10 years
- Hoku Young- 5 years



MONTEREY HOSTING VISIT CA OUTLOOK

MARCH 2-4, 2027

1,000 INDUSTRY ATTENDEES

\$1.5M+ IN ECONOMIC IMPACT





PEBBLE BEACH FOOD & WINE - GROUP SALES ACTIVATION

- 15 Top Luxury Group Planners
 - (Bay Area, Chicago, Texas)
- Showcase Culinary Excellence
- Highlight Wine and Unique Venues
- Emphasize Inspiration and Scale
- Collect Client Testimonials



AIR SERVICE DEVELOPMENT

Air Service Updates – Summer 2026

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

Burbank

Orange County







CONSENT AGENDA

CONSENT AGENDA

1

Minutes of the January 21, 2026 Joint Marketing and Sales Committee Meeting

Recommended Action: Approve Minutes as presented.

2

Department Reports

Recommended Action: Receive February 2026 Report.



REGULAR AGENDA

REGULAR AGENDA

A. FY 25-26 YTD RESULTS & BUSINESS PLAN UPDATES



TOURISM ECONOMICS

2026-2027 FORECAST

2026

- Occupancy Growth flat +.4%
- ADR Growth +1.5%
- Overall Revenue +3.9%
- Supply +1.9%

Study conducted Feb 2026

Indicator Levels

	2025	2026	2027
Occupancy	68.7%	68.9%	69.5%
ADR	\$266	\$270	\$275
Rev PAR	\$183	\$186	\$191
Supply	4.55M	4.64M	4.64M
Demand	3.12M	3.20M	3.23M
Revenue	\$832.3M	\$864.4M	\$888.1M

% Change vs. Previous Year

	2025	2026	2027
Occupancy	2.7%	0.4%	0.8%
ADR	-0.5%	1.5%	1.9%
RevPAR	2.1%	1.9%	2.8%
Supply	-0.4%	1.9%	0.0%
Demand	2.3%	2.4%	0.8%
Revenue	1.8%	3.9%	2.7%

% Change vs. 2019

	2025	2026	2027
Occupancy	-5.1%	-4.7%	-3.9%
ADR	16.2%	17.9%	20.1%
RevPAR	10.2%	12.3%	15.4%
Supply	4.1%	6.2%	6.2%
Demand	-1.2%	1.1%	2.0%
Revenue	14.8%	19.2%	22.5%

MONTEREY COUNTY STR – JAN 1 – APR 4, 2026 VS. 2025



- **Occupancy: 64.7%** (+7.6%)
 - **ADR: \$202.71** (+6.0%)
 - **RevPAR: \$131.08** (+14.1%)
 - **Demand: 769.4K** (+9.7%)
 - **Revenue: \$156M** (+16.4%)
 - **Supply: +2.0%** (315 Rooms)
- Revenue growth (+16.4%) is the standout
 - RevPAR up (14.1%) signals a highly productive market—outpacing both occupancy and rate growth.
 - Occupancy gains (+7.6%) significantly exceed supply growth (+2.0%)
 - Growth in all Tiers –
 - Luxury 11.9%, Full-Service 5.1%, Limited Service 9.1%

GROUP BUSINESS DEVELOPMENT PRODUCTIVITY

Monterey County (FY 25-26 Jul-Mar)

FY2025-26	Leads	Booked Leads	Contracted Rooms	EIC
Single Property	594	137	21,550	\$ 19,044,498
MCC	120	40	33,311	\$ 29,235,337
Grand Total	714	177	54,861	\$ 48,279,835

FY2024-25	Leads	Booked Leads	Contracted Rooms	EIC
Single Property	452	117	31,542	\$ 28,541,058
MCC	114	40	31,917	\$ 38,269,861
Grand Total	566	157	63,459	\$ 66,810,919

Leads are up 20%
Bookings are up 11.2%

Booked EIC -27%
Booked RN's -13.5%

*Single Property Group
Size 157 TY vs. 269 LY*

BUSINESS DEVELOPMENT

FY25-26 JANUARY - JUNE

Corporate Partnerships

- MPI WEC – San Antonio
- HelmsBriscoe Annual Conference
- IMEX Frankfurt

Sales Missions/Co-ops

- Sacramento - Association
- Midwest – Corporate and Association
- *Bay Area – Corporate Event and FAM*
- Dallas/Houston Rodeo - Corporate

Conferences and Industry Events

- MPI Northern California ACE
- PCMA NCC Leap – Sacramento
- Associations West ELEVATE

International Travel Trade

- VCA Sales & Media Mission - Mexico
- IPW – Fort Lauderdale
- VCA Luxury Forum – Lake Tahoe
- *Luxury Travel Agent Activations*
- B2B Campaigns and FAMs

DEMAND 360

Future Booking Data Resource

- Forward-looking demand intelligence tool
- Market-Level Demand Insights (*Not Just Your Hotels*)
- True Competitive Market Visibility
- Stronger Revenue Management Decisions

The logo for Amadeus Demand360+ is displayed on a dark blue rounded rectangular background. The word "aMADEUS" is written in a white, lowercase, sans-serif font, with the 'a' being smaller and positioned to the left of the 'MADEUS'. Below it, "Demand360+®" is written in a white, uppercase, sans-serif font.

aMADEUS
Demand360+®

FY 25-26 JULY-MARCH RESULTS REVIEW

MARKETING COMMUNICATIONS KPIS

Metric	Goal	Q1-Q3 Stats	% To Goal
*Engaged Web Sessions	1,400,000 <i>(was 1,000,000)</i>	1,074,943	77%
MIM Engaged Web Sessions	175,000	158,441	90%
Website Impressions	54,000,000	46,970,000	87%
*Social Engagements	4,000,000 <i>(was 3,100,000)</i>	3,109,030	77%
Social Audience Growth	22,000	17,533	80%
*Partner Site Conversions	290,000 <i>(was 165,000)</i>	203,196	70%
*Top Level Group Conversions	450 <i>(was 305)</i>	545	121%

*Goal adjusted at mid-year

FY 25-26 JULY-MARCH RESULTS REVIEW

MARKETING COMMUNICATIONS KPIS

Metric	Goal	Q1-Q3 Stats	% To Goal
*Top 125 Outlets	70 <i>(was 55)</i>	50 'Firsts' <i>(87 total)</i>	71%
Media Impact Score	14/20	16/20	n/a
Earned Media Impressions	2.25 billion	1,762,001,983	78.31%

TOP OUTLETS



*Goal adjusted at mid-year

ANOTHER DAY IN MONTEREY

Offer Period: Oct 2025 through Mar 2026

Economic Impact

\$1.7M = hitting during need time periods

Promotion:

- Dedicated campaign landing page on SeeMonterey.com
- E-Newsletters: Travelzoo, Visit California & *SF Chronicle*
- Paid social, coordinated organic social & website content
- Earned media & PR pitching

Results:

- **20,000+** partner referrals (*clicks to partner sites*)
- Over **72,000+** NEW users to landing page (*reaching new audiences*)
- Over **90,000** total web sessions



SOCIAL MEDIA STAND OUTS

So close to 100K!

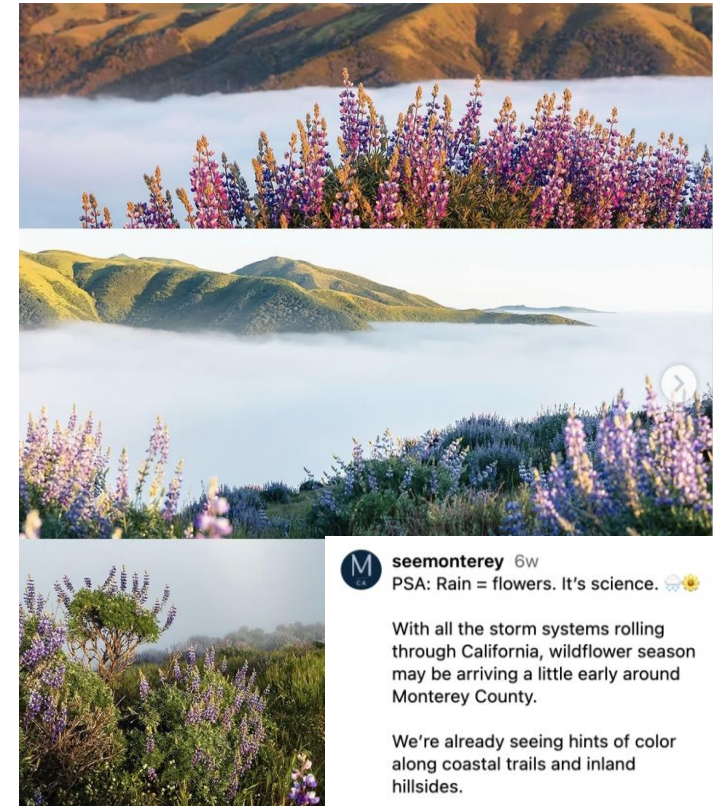
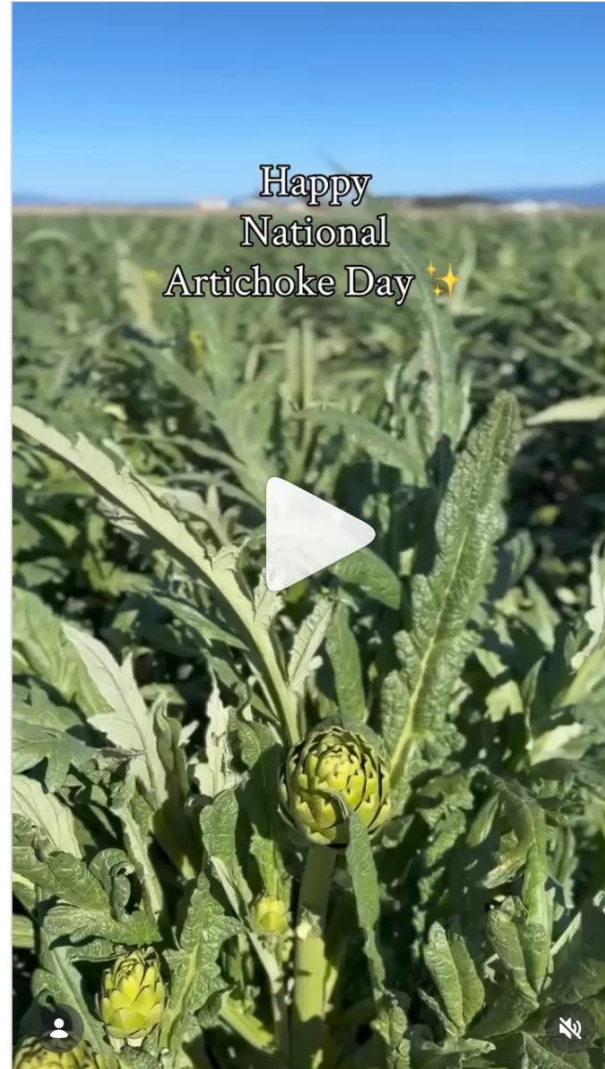


See Monterey

4,336 posts

99.5K followers

2,406 following



seemonterey 6w
PSA: Rain = flowers. It's science. 🌧️🌻

With all the storm systems rolling through California, wildflower season may be arriving a little early around Monterey County.

We're already seeing hints of color along coastal trails and inland hillsides.

👉 Explore responsibly and stay on trails. Find the best places to catch them in action in our blog at the link in bio.

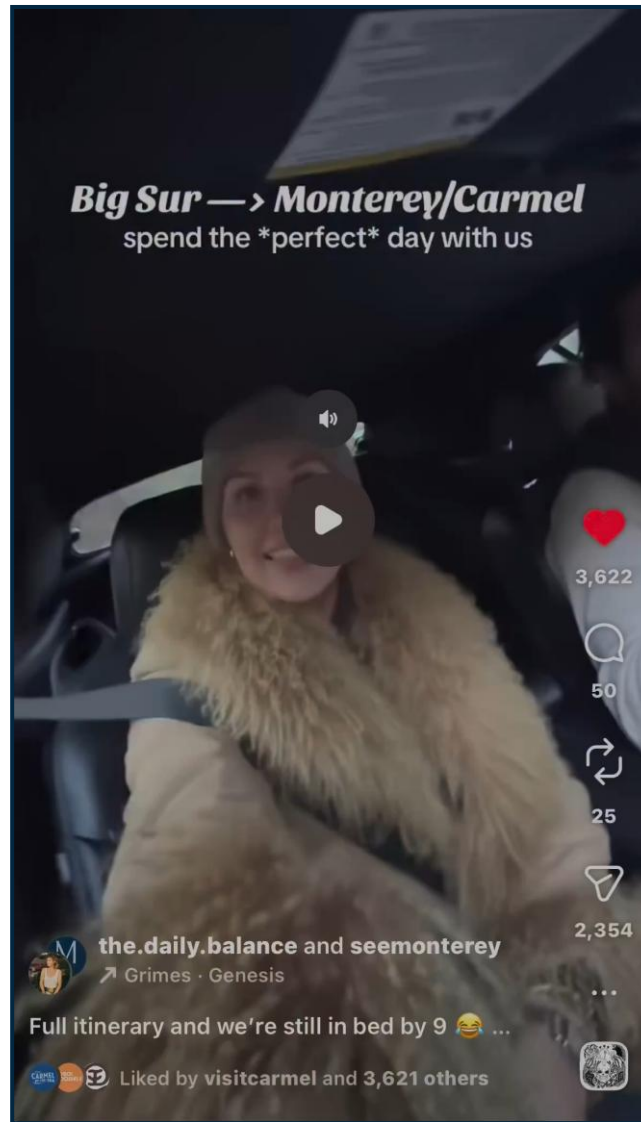
[@elliothawkey](#)

2.3K 26

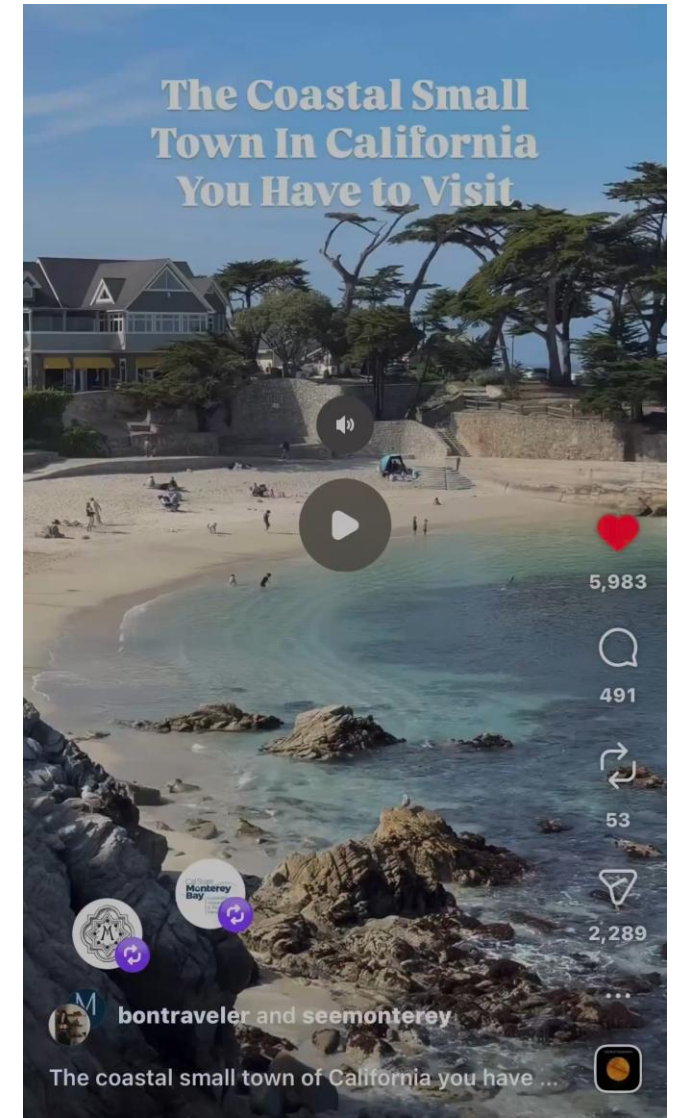
SOCIAL MEDIA STAND OUTS

@BonTraveler and
@daily.balance

Two high-performing recent
influencer collaborations!

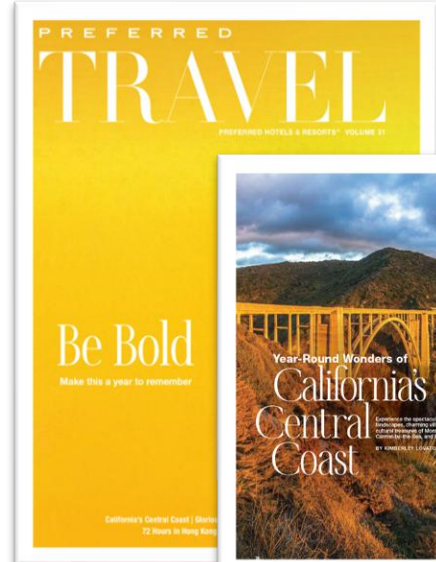
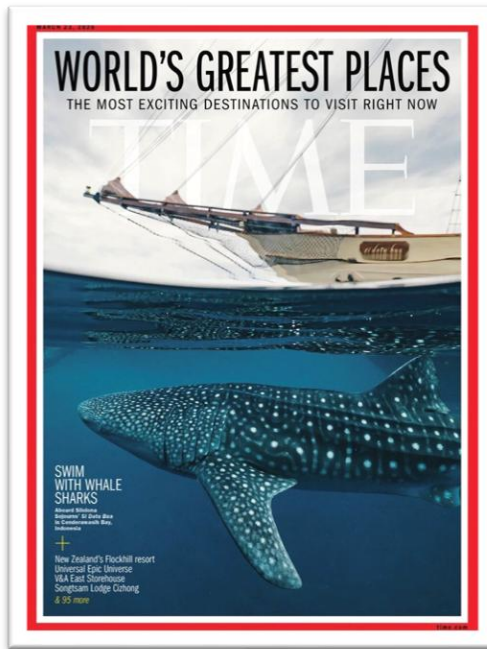


@DailyBalance
43 stories - 425,994 views
6 reels - 1.4 M views



@BonTraveler
18 stories - 116,803 views
2 Grid posts - 1.5 M views

PR STAND OUTS



Q4 MAJOR PROJECTS & PROGRAMS



Promoting HWY 1

- Domestic + international paid media campaigns running
- HWY 1 influencer road trip with Visit California
- Continuing to collab with SLO CAL on social media & future activations



Chicago Flight Launch

- Paid media campaign running in Chicago
- 18 mtgs with writers, editors, producers and influencers in Chicago market
- Media FAM tied to inaugural flight on May 23



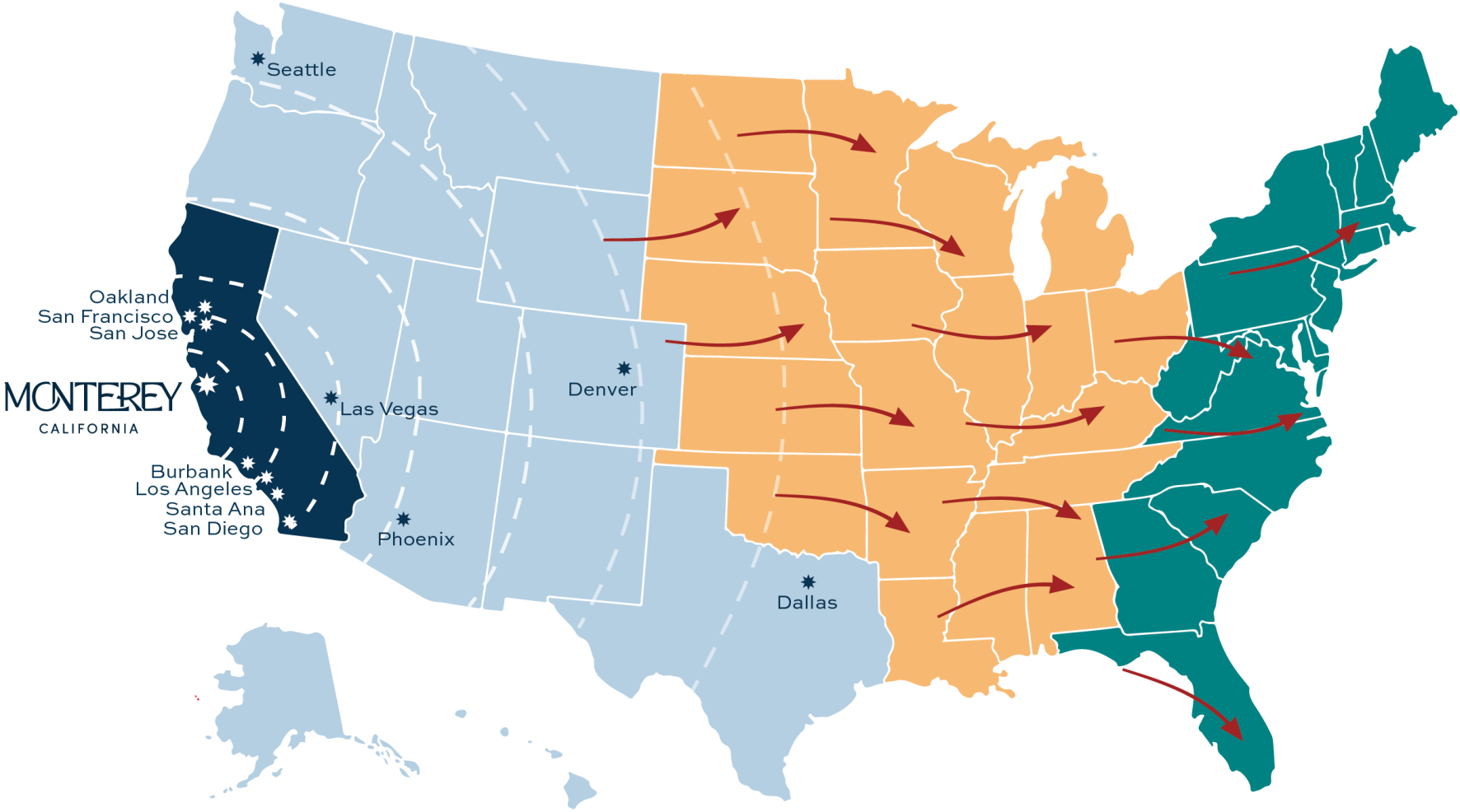
Wheel of Fortune

- Airing April 22nd cross ABC, CBS, and NBC affiliates (8 million viewers)
- Next-day streaming availability for one week on Peacock, Hulu, and Disney+
- National consumer sweepstakes



FY 25-26 MARKETING COMMUNICATIONS

MARKETING REACH



Marketing Reach - New Markets

	Chicago	Minneapolis	Detroit
FY25 Sessions	12,229	2,638	789
FY26 Sessions	69,323	2,166	1,558
% Change YOY	466.87%	-17.89%	97.47%
FY25 New Users	9,108	2,104	572
FY26 New Users	67,085	1,729	1,336
% Change YOY	636.55%	-17.82%	133.57%

	Austin	Salt Lake City	Nashville
FY25 Sessions	2,811	1,605	1,062
FY26 Sessions	5,219	1,848	1,672
% Change YOY	85.66%	15.14%	57.44%
FY25 New Users	2,128	1,191	732
FY26 New Users	4,456	1,455	1,407
% Change YOY	109.40%	22.17%	92.21%

Find Your Way Here 2.0: Upcoming Video + Photoshoot

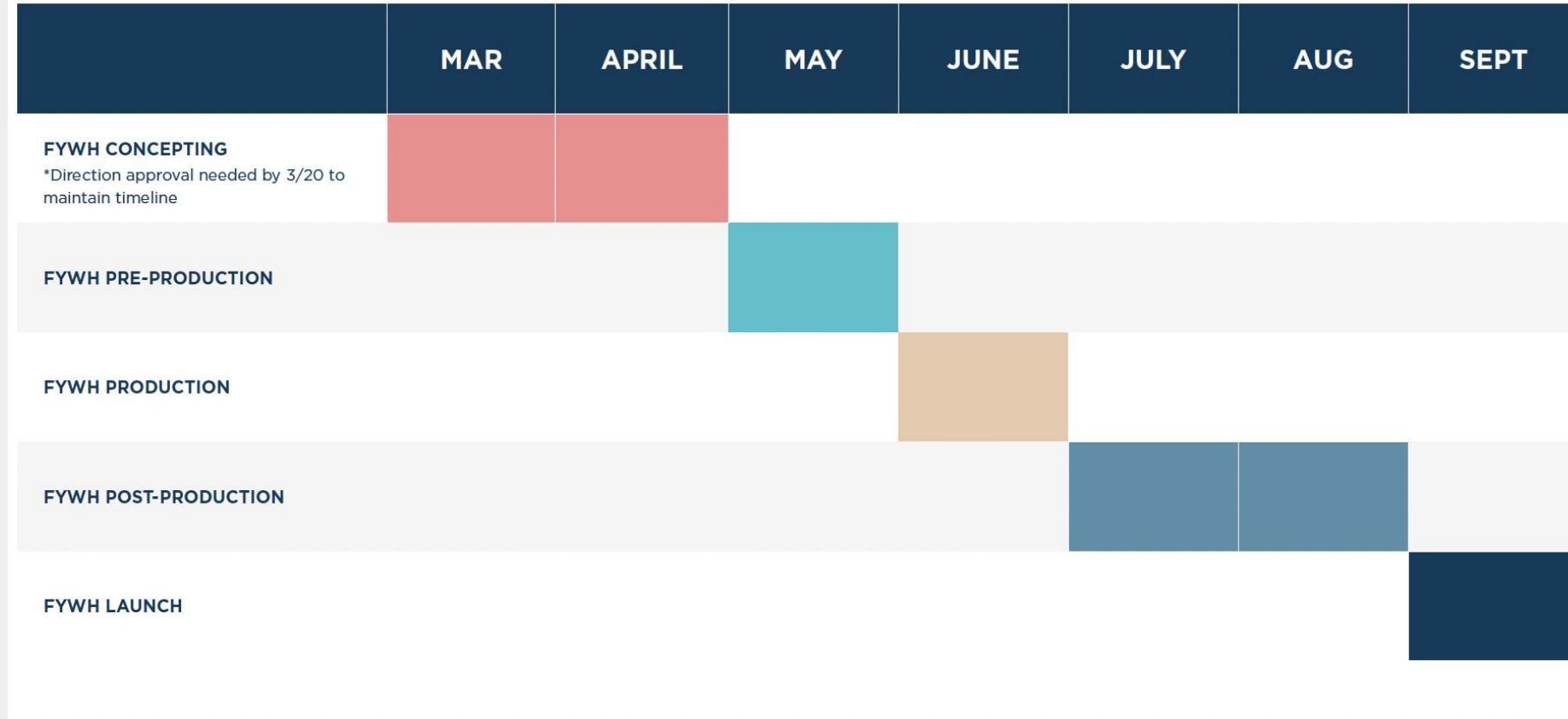
SCOPE:

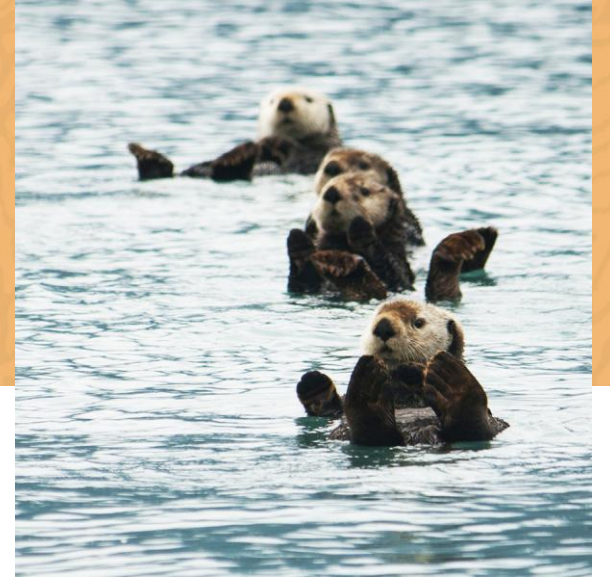
- Landmark Assets
- Luxury, Wine Country
- Destination Identities

TIMELINE:

- Concepting (Apr)
- Pre-Production (May)
- Production (Jun – Jul)
- Post-Production (Jul – Aug)
- Launch (Sept)

CREATIVE PRODUCTION TIMELINE





REGULAR AGENDA

B. FY 2026-27 BUSINESS PLAN AND BUDGET

LEVERAGE!

LEISURE TRAVEL TRENDS AND INSIGHTS

- “Slow Travel” on the rise longer stays, deeper experiences
- Kids influencing travel decisions more than ever
- Travel advisors resurging (62% plan to use them)
- Leisure demand remains strong despite uncertainty
- Travelers spending more intentionally, taking fewer trips

Skift

Internova
TRAVEL GROUP

Deloitte.
Insights

Forbes

LEVERAGE!

LUXURY TRAVEL TRENDS AND INSIGHTS

- Luxury travel continues to outperform overall market with high-end travelers driving a disproportionate share of spending
- Luxury market is expected to reach \$1.83T in 2026
- Shift from status-driven travel to personalization and meaning
- Growth in immersive, experiential luxury (cultural and gastronomy)
- 83% of luxury travelers seek distinctive, non-generic experiences

TRAVEL+
LEISURE

ELITE
TRAVELER

The Business
Research Company


LUXURY TRAVEL IN MONTEREY COUNTY

The most diverse portfolio of luxury properties and experiences anywhere on the West Coast

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

Alila[®]
VENTANA BIG SUR


BERNARDUS
LODGE & SPA

L'AUBERGE
CARMEL
1929
HOTEL & RESTAURANT

Casa Palmero[®]
PEBBLE BEACH[®]



THE LODGE
PEBBLE BEACH[®]


Post Ranch Inn
BIG SUR

La Playa Hotel

CARMEL BEACH
HOTEL



CARMEL VALLEY RANCH



PEBBLE BEACH[®]

LEVERAGE!

GROUP/MEETING TRAVEL TRENDS AND INSIGHTS

- Niche is winning
- Bleisure is now expected
- Personalization is redefining meetings, from agendas to experiences
- Incentive travel is going VIP
- Smaller groups, bigger spend, and once-in-a-lifetime experiences
- Destination appeal is critical
- Planners are prioritizing locations with strong sense of place, unique off-site experiences, and easy accessibility



CADENCE®



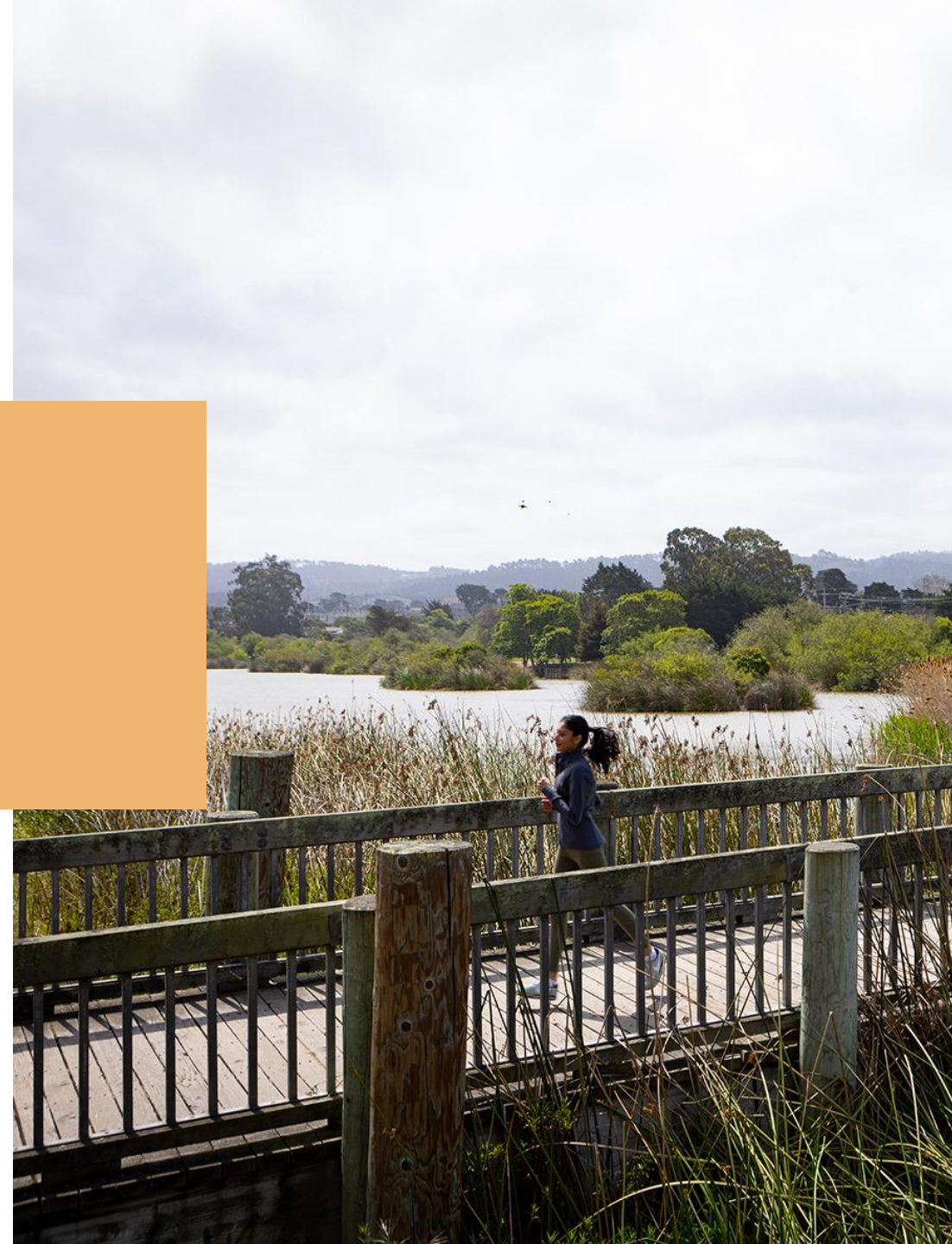
FY 26-27 CONSIDERATIONS

Industry Trends



Q & A

What are you seeing?



FY 26-27 STRATEGIC PRIORITIES

- Extended Leisure Markets
- Group – Large & Small; Bleisure, C-Suite
- International

Key Programs

- Wine & Culinary
- Luxury
- Destination Stewardship/ Responsible Travel
- Leverage Global Spotlight Moments
 - World Cup
 - Outlook Forum in MRY
 - US Men's Open
 - LA Olympics



MCT 2030

STRATEGIC IMPERATIVES

Event Strategy

- Provide direct promotional support to major events to maximize attendance
- Leverage unique/opportunistic opportunities – e.g., Pebble Beach Pro-Am/Super Bowl 60
- Create Event Task Force – focus on attracting new events in need periods

Brandtailing

- Special offers, local's specials, OTA partnerships, Group Incentives

Economic Development

- Leverage increased focus on Economic Development by various jurisdictions

EVENTS STRATEGY- Activations

INDY Car Race Championship

September 2026

Cannery Row and Alvarado Street
Championship Dinner

County Wide Holiday Activation

December 2026

U.S. Men's Open, Pebble Beach

June 2027

Large Scale FAM Activation-
Meeting Planners, International and
PR

VCA Outlook Conference

March 2027

Downtown Monterey
1,000 attendees

DATA-DRIVEN STRATEGY & MARKET INSIGHTS

- Market Intelligence Survey- May 2026
- DMO Benchmarking Analysis
- Sales Deployment Assessment



GROUP & DESTINATION EVENT CONSIDERATIONS

*Maintain Always on Group
Tactics but layer in...*

- Advance Monterey County's Group & Meetings Sweet Spot
- Drive Incremental Revenue Through Bleisure & Length-of-Stay Strategies
- Expand Consideration & Capture Proximity-Driven Group Demand



FY 26-27 BUSINESS DEVELOPMENT CONSIDERATIONS

GOALS & KEY METRICS

Metrics that show increased REACH and NEW Business growth

ORGANIZATION GOALS

Leads (Range 850 to 900)

Conversion (25%)

NEW Business Leads (55%)

POSSIBLE KPIs

- Solicitation Goal Targets
- % growth in >400 on peak leads
- Need Time and Mid-Week Bookings
- Growth in Further out Markets
- MCC Booking Pace
- Usage of Meeting Incentive Payout
- Growth in Market Segments

FY 26-27 BUSINESS DEVELOPMENT CONSIDERATIONS

DRAFT BUDGET APPROACH

Business Development	FY2025-26 Reforecast	FY2026-27 Budget	Difference	% Chg
BD Programs	117,792	126,154	8,362	7%
Group Events	1,253,800	1,348,765	94,965	8%
Leisure Events	426,156	448,180	22,024	5%
Meeting Incentives	141,760	100,000	(41,760)	-29%
Group Marketing	1,010,676	1,052,750	42,074	4%
BD Operations	98,079	91,140	(6,939)	-7%
Total Business Development	3,048,263	3,166,989	118,726	4%

FY 26-27 MARKETING COMMUNICATIONS- *CONSIDERATIONS*

- Strengthen and Expand Core Markets and Invest in High-Value Growth Markets
- Elevate Monterey County's Luxury, Wine & Culinary Identity — Own the Narrative of Place
- Leverage Global Spotlight Moments to Accelerate Brand Elevation & Leisure Demand
- Expand Leadership in Destination Stewardship & Responsible Travel



FY 26-27 MARKETING COMMUNICATIONS CONSIDERATIONS

GOALS & KEY METRICS

Metrics that show increased REACH and Visitor Intent

GOALS

- Engaged Social Audience Growth (grow followers without losing engagement)
- % Website Impressions instead of Website Sessions (Measures presence across search + AI - a more stable measurement, even as traffic declines)
- Intent to Visit Score; Growth of Awareness in Fly Markets, Foot Traffic Attributed to Advertising

POTENTIAL KPIs

- Partner Site Conversions
- Top Level Group Conversions
- Referral Traffic from Earned Media/Influencers
- Earned Media Impressions
- Media Impact Score
- Social Engagements

AI-FOCUSED METRICS

- *Referrals from LLMs (AI Referrals from ChatGPT, Perplexity, etc.)*
- *AI Overview Entrances*
- *Retrievals and Citations*
- *Traffic from AI*

FY 26-27 MARKETING COMMUNICATIONS CONSIDERATIONS

DRAFT BUDGET APPROACH

Marketing Expense	FY2025-26 Reforecast	FY2026-27 Budget	Difference	% Chg
Leisure Marketing	3,552,588	3,677,025	124,437	4%
International Marketing	262,390	295,500	33,110	13%
Luxury Marketing	478,669	545,200	66,531	14%
Public Relations	455,021	466,000	10,979	2%
Agency Fees	423,456	427,818	4,362	1%
Marketing Operations	708,000	701,365	(6,635)	-1%
Community Relations	105,642	160,300	54,658	52%
Total Marketing Expense	5,880,124	6,112,908	232,784	4%

FY 26-27 COMMUNITY RELATIONS –

CONSIDERATIONS

- Strengthen Proactive Community Engagement & Partnership Alignment
- Advance the “Tourism Matters” Local Narrative
- Support Responsible Growth Through Dialogue, Data & Preparedness

Educational Series (Fall/Spring), It-Takes-Two, Meet a Member, and FAMs





GOOD OF THE
ORDER



**NEXT MEETING
MARKETING & SALES:
JULY TBD**



ADJOURNED
Thank you!