

The Economic Impact of Travel

Monterey County 2025 Preliminary Estimates

April 2026

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See Monterey



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The Economic Impact of Travel in Monterey County

2025 Preliminary Estimates

See Monterey

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Monterey
County

2025 Preliminary Estimates

Monterey County / Summary

Travel Impacts 2025p

Visitor travel to Monterey County continued to grow in 2025. The county welcomed more overnight and day visitors compared to 2024, and direct travel spending increased by 4.1%. The increase in travel activity led to a 1.5% increase in employment. Tax receipts paid by visitors to the county also increased by 6.1%.

- Direct travel spending in Monterey County increased 4.1%, to \$3.3 billion in 2025.
- Direct travel-generated employment grew by 400 jobs, a 1.5% increase over 2024.
- Direct travel-generated earnings increased to \$1.9 billion, a gain of 7.5% compared to 2024.
- Direct tax receipts generated by travel spending increased to \$346.0 million, a gain of 6.1% compared to 2024.

In 2025, travel spending in Monterey County **reached \$3.3 billion**, marking a 4.1% rise from the prior year.

Note: These estimates for Monterey County are subject to revision if more complete data becomes available. Estimates for 2025 are preliminary – thus “2025p.”



Monterey County / Direct Travel Impacts

Summary Table

	2019	2020	2021	2022	2023	2024	2025p	Avg. Annual % Chg	
								2024-2025p	2019-2025p
Spending (\$Millions)									
Total	3,240.5	1,552.5	2,418.8	2,952.3	2,951.5	3,132.0	3,259.9	4.1%	0.1%
Earnings (\$Millions)									
Earnings	1,420.1	1,056.3	1,209.5	1,489.5	1,640.7	1,762.9	1,894.4	7.5%	4.9%
Employment (Jobs)									
Employment	27,160	20,340	21,980	25,490	26,890	27,360	27,760	1.5%	0.4%
Tax Revenue (\$Millions)									
Total	297.8	183.2	269.3	307.7	293.0	326.0	346.0	6.1%	2.5%
Local	153.5	97.0	155.6	178.7	166.6	187.1	199.0	6.3%	4.4%
State	144.3	86.3	113.7	129.0	126.5	138.9	147.0	5.9%	0.3%

Note: Details may not add to totals due to rounding. Percent change calculated on unrounded figures.



Monterey County / Direct Travel Impacts

City-Level Summary Table, 2025p

	Carmel	Marina	Monterey	Pacific Grove	Salinas	Seaside	Unincorporated /Other	Monterey County
Spending (\$Millions)								
Total	270.7	124.9	879.1	161.1	415.7	199.0	1,209.3	3,259.9
Earnings (\$Millions)								
Earnings	157.3	72.6	510.9	93.6	241.6	115.6	702.8	1,894.4
Employment (Jobs)								
Employment	2,310	1,060	7,490	1,370	3,540	1,690	10,300	27,760
Tax Revenue (\$Millions)								
Total	28.7	13.3	93.3	17.1	44.1	21.1	128.4	346.0
Local	16.5	7.6	53.7	9.8	25.4	12.1	73.8	199.0
State	12.2	5.6	39.6	7.3	18.7	9.0	54.5	147.0



Monterey County / Direct Travel Impacts

Detailed Table

	2019	2020	2021	2022	2023	2024	2025p
Direct Travel Spending (\$Millions)							
Destination Spending	3,127.6	1,511.9	2,345.6	2,844.3	2,846.8	3,025.0	3,152.8
Other Travel*	113.0	40.6	73.2	108.0	104.7	107.0	107.1
TOTAL	3,240.5	1,552.5	2,418.8	2,952.3	2,951.5	3,132.0	3,259.9
Visitor Spending by Type of Traveler Accommodation (\$Millions)							
Hotel, Motel, STVR	2,280.8	1,145.1	1,736.7	2,055.8	2,050.1	2,203.5	2,308.3
Private Home	205.0	71.2	199.7	223.3	226.3	234.6	238.7
Campground	49.6	41.5	53.9	70.3	69.9	70.4	73.7
Vacation Home	73.3	100.7	90.5	93.0	95.3	96.5	98.0
Day Travel	518.8	153.5	264.7	401.7	405.3	420.1	434.1
TOTAL	3,127.6	1,511.9	2,345.6	2,844.3	2,846.8	3,025.0	3,152.8
Visitor Spending by Type of Commodity Purchased (\$Millions)							
Accommodations	879.1	449.2	823.9	985.7	962.1	1,026.6	1,067.4
Food Service	966.6	485.0	663.1	800.5	828.2	894.1	945.1
Food Stores	77.7	43.4	69.0	86.2	90.2	94.2	98.1
Local Tran. & Gas	266.7	102.6	174.8	240.3	230.2	234.4	239.4
Arts, Ent. & Rec.	394.0	184.2	260.4	298.9	304.8	327.7	341.5
Retail Sales	519.7	240.7	340.3	403.5	401.3	411.6	424.1
Visitor Air Tran.	23.8	6.9	14.2	29.2	30.0	36.4	37.2
TOTAL	3,127.6	1,511.9	2,345.6	2,844.3	2,846.8	3,025.0	3,152.8

Note: Details may not add to totals due to rounding.

*Other Travel includes resident air travel, travel arrangement, and convention/trade shows.



Monterey County / Direct Travel Impacts

Detailed Table

	2019	2020	2021	2022	2023	2024	2025p
Travel Industry Earnings (\$Millions)							
Accom. & Food Serv.	786.1	561.2	672.8	854.2	915.1	969.5	1,040.2
Arts, Ent. & Rec.	454.5	348.6	374.4	461.3	537.4	591.1	643.2
Retail	86.4	87.0	97.7	101.8	107.9	111.6	116.2
Ground Tran.	49.4	17.6	17.3	18.5	20.0	23.0	24.6
Visitor Air Tran.	20.1	19.5	22.9	27.4	30.8	34.1	35.2
Other Travel*	23.5	22.3	24.3	26.3	29.5	33.5	35.0
TOTAL	1,420.1	1,056.3	1,209.5	1,489.5	1,640.7	1,762.9	1,894.4
Travel Industry Employment (Jobs)							
Accom. & Food Serv.	18,160	13,350	14,580	17,020	17,780	17,740	17,790
Arts, Ent. & Rec.	5,360	3,750	4,020	4,910	5,460	5,810	6,060
Retail**	2,220	2,090	2,180	2,180	2,190	2,240	2,280
Ground Tran.	980	760	740	890	960	1,040	1,090
Visitor Air Tran.	140	120	160	180	190	200	200
Other Travel*	310	270	300	300	310	330	340
TOTAL	27,160	20,340	21,980	25,490	26,890	27,360	27,760
Tax Receipts Generated by Travel Spending (\$Millions)							
Local Tax Receipts	153.5	97.0	155.6	178.7	166.6	187.1	199.0
Visitor	109.4	53.6	102.5	123.3	121.8	130.0	135.5
Business or Employee	44.1	43.4	53.1	55.4	44.8	57.1	63.5
State Tax Receipts	144.3	86.3	113.7	129.0	126.5	138.9	147.0
Visitor	106.5	50.9	75.7	87.2	89.4	94.7	98.8
Business or Employee	37.8	35.4	38.0	41.8	37.0	44.2	48.2
TOTAL	297.8	183.2	269.3	307.7	293.0	326.0	346.0

Note: Details may not add to totals due to rounding.

*Other Travel includes resident air travel, travel arrangement, and convention/trade shows.


**Retail includes gasoline station employment and earnings



Monterey County / Overnight Visitor Details

Overnight Visitor Volume and Average Expenditure

Overnight visitor volume for Monterey County is based on cross-referencing visitor surveys and lodging data. Volume estimates therefore will differ from methodologies that rely solely on visitor surveys. Visitor Spending is a more reliable metric than Visitor Volume in accounting for changes in the travel industry, as it is more closely tied to economic data and lessens the variability from visitor surveys. Day travel estimates are not included because of data limitations.



51%
Hotel, Motel, STVR
share of overnight
person-trips

Average Expenditure for Overnight Visitors, 2025p

	Party		Person		Length of Stay	Party Size
	Day	Trip	Day	Trip		
Hotel, Motel, STVR	\$1,299	\$3,360	\$397	\$1,028	2.6	3.3
Private Home	\$165	\$580	\$79	\$275	3.5	2.1
Other Overnight	\$125	\$371	\$46	\$136	3.0	2.7
All Overnight	\$591	\$1,741	\$216	\$622	2.9	2.8

Overnight Visitor Volume, 2023-2025p

	Person-Trip (Thousands)			Party-Trips (Thousands)		
	2023	2024	2025p	2023	2024	2025p
Hotel, Motel, STVR	2,075	2,190	2,245	636	671	687
Private Home	857	868	868	407	412	412
Other Overnight	1,221	1,225	1,260	449	450	462
All Overnight	4,154	4,283	4,373	1,491	1,533	1,561

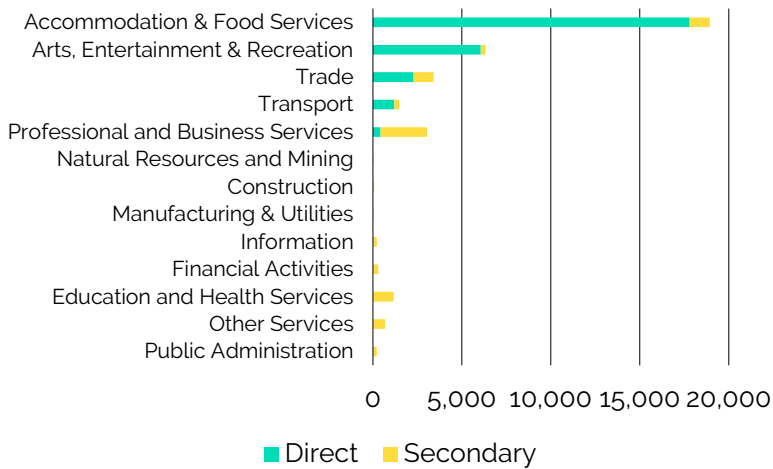
	Person-Nights (Thousands)			Party-Days (Thousands)		
	2023	2024	2025p	2023	2024	2025p
Hotel, Motel, STVR	5,367	5,664	5,810	1,642	1,733	1,776
Private Home	3,002	3,041	3,040	1,425	1,443	1,443
Other Overnight	3,617	3,628	3,725	1,339	1,343	1,378
All Overnight	11,986	12,332	12,575	4,406	4,519	4,597

Note: Private Home represents visitors staying with friends or family. (Glossary on page 14)

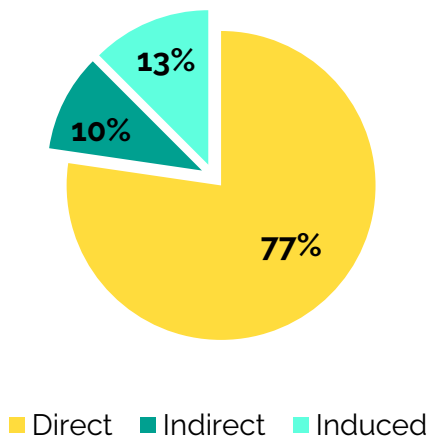
Monterey County / Secondary Impacts

Total Employment

Direct and Secondary Employment



Share of Total Employment



Industry Group	Direct	Secondary			Grand Total
		Indirect	Induced	Total	
Accommodation & Food Services	17,793	459	674	1,133	18,926
Arts, Entertainment & Recreation	6,059	120	150	270	6,329
Trade	2,278	253	883	1,136	3,414
Transport	1,198	129	161	289	1,487
Professional and Business Services	433	2,037	567	2,604	3,037
Natural Resources and Mining	0	16	21	37	37
Construction	0	42	28	69	69
Manufacturing & Utilities	0	26	13	38	38
Information	0	144	66	210	210
Financial Activities	0	99	202	302	302
Education and Health Services	0	25	1,135	1,160	1,160
Other Services	0	207	471	678	678
Public Administration	0	104	115	220	220
All Industries	27,761	3,661	4,486	8,147	35,908

Note: Values may not add to totals due to rounding. Employment includes full-time employees, part-time employees, seasonal employees, and proprietors.

MOST DIRECT JOBS

 Accommodations & Food Services

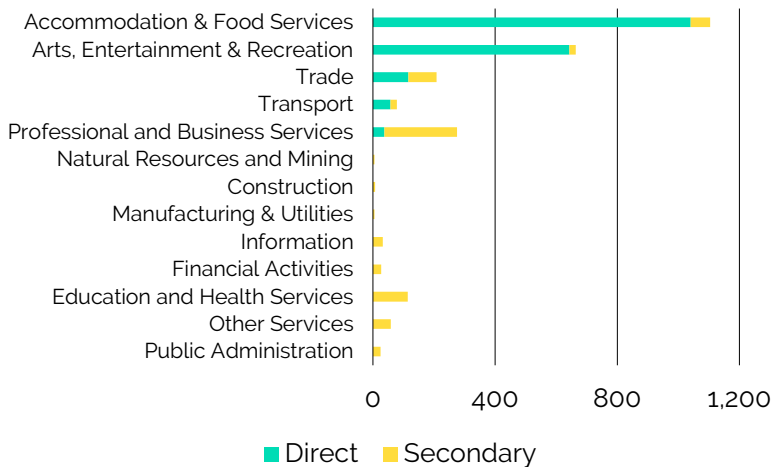
MOST SECONDARY JOBS

 Professional & Business Services

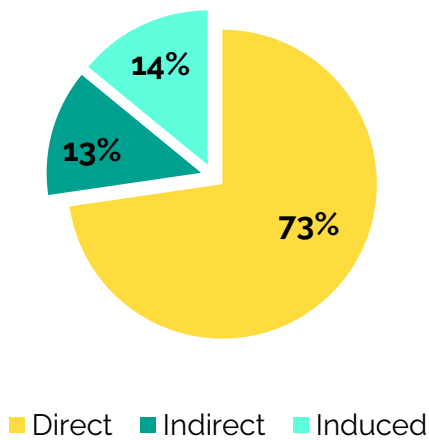
Monterey County / Secondary Impacts

Total Earnings

Direct and Secondary Earnings



Share of Total Earnings



Industry Group	Direct	Secondary			Grand Total
		Indirect	Induced	Total	
Accommodation & Food Services	1,040.2	26.7	37.2	63.9	1,104.0
Arts, Entertainment & Recreation	643.2	9.4	11.6	21.0	664.2
Trade	116.2	26.7	66.0	92.7	208.8
Transport	57.7	10.8	10.0	20.8	78.4
Professional and Business Services	37.1	187.9	50.6	238.6	275.7
Natural Resources and Mining	0.0	2.8	2.5	5.3	5.3
Construction	0.0	4.1	2.6	6.7	6.7
Manufacturing & Utilities	0.0	3.5	1.8	5.3	5.3
Information	0.0	25.2	7.0	32.2	32.2
Financial Activities	0.0	9.2	17.8	27.0	27.0
Education and Health Services	0.0	1.7	112.6	114.4	114.4
Other Services	0.0	20.8	38.2	59.0	59.0
Public Administration	0.0	16.1	8.7	24.7	24.7
All Industries	1,894.4	344.9	366.6	711.4	2,605.8

Note: Values may not add to totals due to rounding.

MOST DIRECT EARNINGS

 Accommodations & Food Services

MOST SECONDARY EARNINGS

 Professional & Business Services

Glossary

Key Terms

Term	Definition
2nd Home	Homes under private ownership for personal use as a seasonal property where a lodging tax is not collected.
Day Travel	A trip that involves non-routine travel of greater than 50 miles to the destination and but no overnight stay in the destination.
Destination Spending	Direct spending made by visitors in a destination. Interchangeable with "Visitor Spending."
STVR	STVR stands for "short term vacation rental." The category includes private and semi-private lodging rented by owners or property management companies (e.g., Airbnb & VRBO).
State Taxes	State taxes generated by travel spending.
Local Taxes	City and county taxes generated by travel spending.
Direct Employment	Employment generated by direct travel spending. It includes full-time employees, part-time employees, seasonal employees, and proprietors.
Direct Earnings	Total after-tax net income generated from travel spending. It includes wages and salary disbursements, proprietor income, and other earned income or benefits.
Other Spending	Spending by residents on travel arrangement services and/or spending for convention activity.
Visitor Spending	Spending by visitors in a destination.
Hotel, Motel, STVR	Accommodation types that house transient lodging activity.
Other Overnight	Overnight visitors who stay in a campground or 2nd home.
Private Home	Personal residences used to host friends and family visiting overnight in the destination.
NAICS	North American Industry Classification System.
Vacation Home	Privately owned homes for personal use as a seasonal property.
Person Trip	A trip made by a person to the destination.



Methodology

Travel Impacts Methodology

The direct travel impacts reported in this analysis were estimated using DRA's Regional Travel Impact Model (RTIM). First developed in 1985, this model estimates direct impacts at a local level without relying on annual survey research. The "bottom up" approach of the RTIM involves modeling of private and public data at the county level, ensuring that the final findings correspond closely with the various travel indicators available for each respective county. Results are then aggregated to regions and the state or disaggregated to the city level based on relevant indicators at these geographic levels. The result is a detailed profile of taxes, employment, wages, and spending that can be tracked consistently over time.

The economic impact associated with day visitors and overnight visitors is a primary breakout included in this report. Lodging tax data and survey data on visitor expenditures inform estimates of total spending associated with overnight visitors who stay in commercial lodging in the studied region. DRA maintains our own expenditure distribution database for each state we work in, with input from multiple major survey providers. Inventory of campgrounds are collected for commercial and public sites, and occupancy is modeled based on a representative subset of sites. Sales attributable to travelers staying in their second homes are calculated from inventories from the US Census and public information on average utilization rates. Visitation of friends and relatives (VFR) is generally stable across time and geography, the primary driver for a destination being the local resident population. Estimates of visitor spending related to day travel can be driven by several factors, including proximity to nearby populous areas, opportunities for recreation and shopping, and inventory of lodging options compared to surrounding areas. Baseline estimates for day visitation are calculated as a factor of overnight visitation, the factor being derived from regional results of national visitor profile data.

Spending on travel-related activities translates into jobs, earnings, and taxes. Calculation of these direct impacts relies on public data on jobs, wages, and business receipts by industry for each geographical area. State and local taxes on travel-related business also factor into triangulating direct travel impacts.

Findings in this report have been compared to various public and private data sources to ensure that the economic impacts estimates are as accurate as possible. Key private data sources used for purposes of this analysis include STR, KeyData, AirDNA, and OmniTrak. Public data sources include the US Census, Bureau of Economic Analysis (BEA), Bureau of Labor Statistics (BLS), Energy Information Administration (EIA), Bureau of Transportation Statistics (BTS), California Employment Development Department (EDD), and the city governments of Carmel, Gonzales, Greenfield, King City, Marina, Monterey, Pacific Grove, Salinas, Seaside, and Soledad in California.

