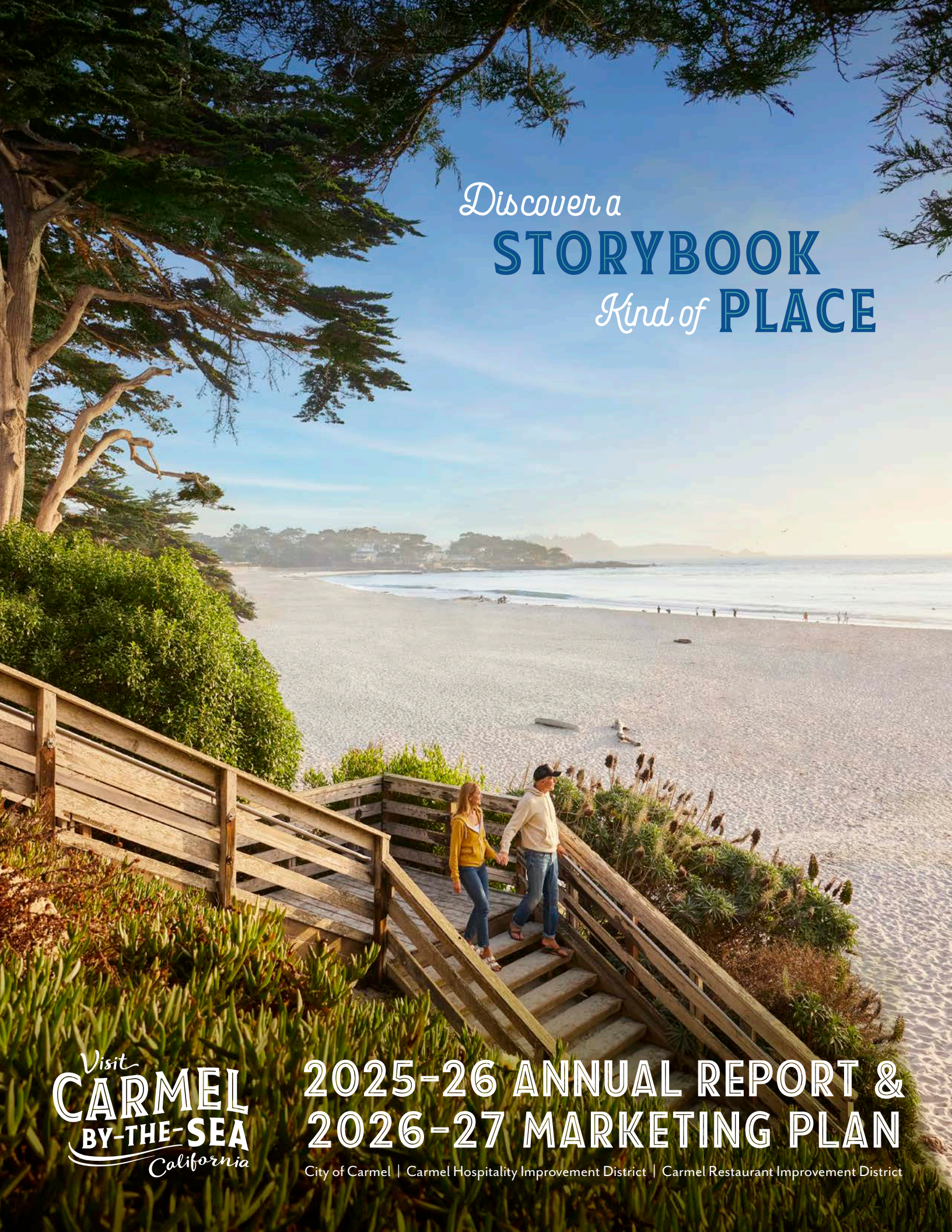
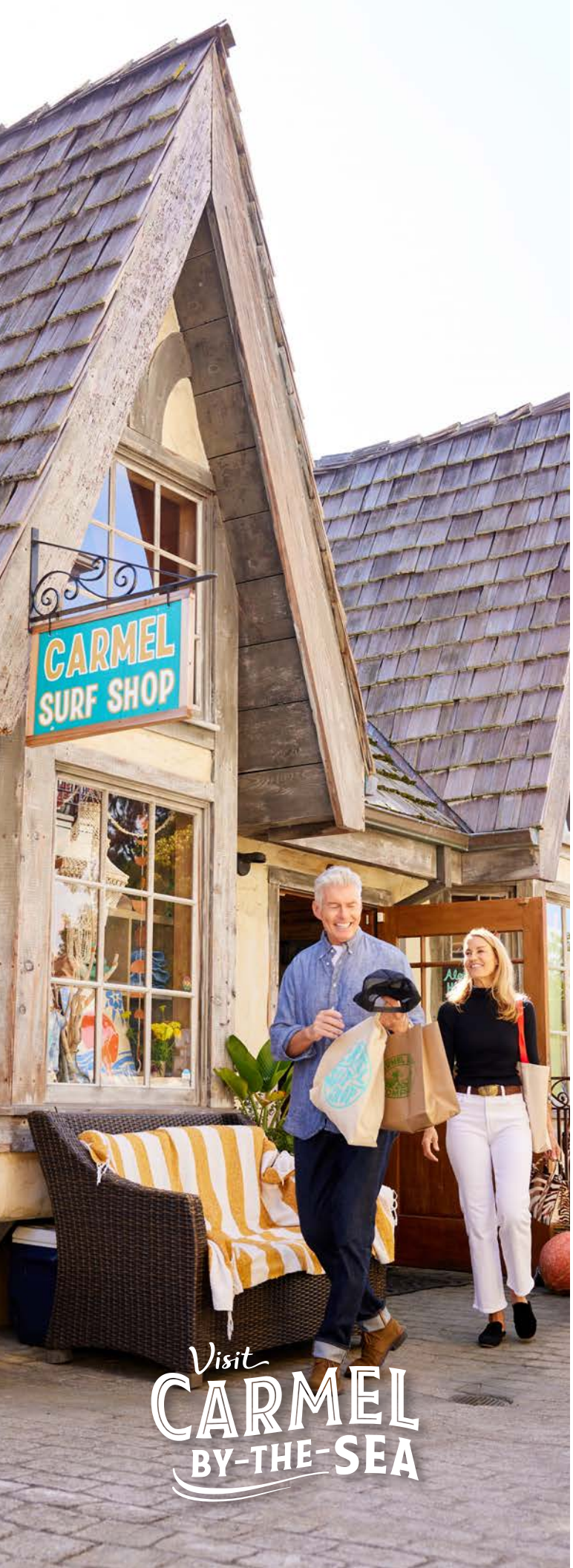


Visit CARMEL BY-THE-SEA California

2025-26 ANNUAL REPORT & 2026-27 MARKETING PLAN

City of Carmel | Carmel Hospitality Improvement District | Carmel Restaurant Improvement District



FY 2025–26 ANNUAL REPORT & FY 2026–27 MARKETING PLAN

Letter from the Chair & Executive Director 2

About Visit Carmel 3

Mission & Objectives 4

Board & Committees 4

Current Boundary 5

Assessment Methodologies 6

Tourism & Lodging Performance 7

Financial Summary & FY26-27 Budget 8

2025–26 Overview & 2026–27 Strategic Marketing Plan

a. Integrated Marketing Review 10

b. Earned and Owned Media Strategy 25

c. Marketing Results and Metrics 31

d. Community Relations & Partnerships . . 32

A LETTER FROM OUR CHAIR & EXECUTIVE DIRECTOR

Dear Carmel-by-the-Sea Community and Partners,

On behalf of Visit Carmel, we are proud to present the 2025–26 Annual Report and 2026–27 Marketing Plan—a reflection of another strong year for Carmel-by-the-Sea and an important year of opportunity and progress.

Carmel's tourism economy continued to perform well, with year-over-year growth in overnight visitation, hotel rates, and transient occupancy tax (TOT) collections. TOT revenue exceeded $10.2 million, a new record following a previous year of historic growth. These results underscore the vital role tourism plays in supporting Carmel's businesses, jobs, and the City's financial health.

Our marketing efforts expanded Carmel's reach and strengthened its position in an increasingly competitive travel marketplace. Through integrated digital, social, video, public relations, and traditional marketing, we introduced Carmel to more overnight visitors while reinforcing our *Storybook Kind of Place* brand. Targeted campaigns drove meaningful growth in engagement among high-intent overnight travelers, while coverage in high-profile media outlets elevated Carmel's visibility and lent third-party credibility to our storytelling, showcasing our hotels, restaurants, wine experiences, art, shopping, and distinctive character.

Working in partnership with the Monterey Regional Airport, we also made meaningful progress in expanding access to Carmel. The launch of seasonal nonstop service to and from Chicago opened Carmel to new longer-stay visitors from the Midwest and beyond. Additionally, after a three-year closure, the full reopening of Highway 1 through Big Sur further strengthened regional connectivity, while the 2026 FIFA World Cup presented a significant opportunity to showcase the Monterey Peninsula to visitors from around the world.

Carmel's culinary identity continued to gain momentum through another successful Carmel Culinary Week. Now firmly established as a signature destination event, the 2026 celebration brought together local chefs, restaurants, wineries, and hospitality partners to celebrate some of our community's greatest assets while encouraging visitors to stay longer and experience more of Carmel.

This year reinforced the importance of coming together as a community around the future of tourism. As Carmel continues to attract visitors and benefit from a strong tourism economy, Visit Carmel remains committed to working collaboratively with residents, businesses, city leadership, and community partners to thoughtfully manage tourism—maximizing its economic and community benefits while protecting the character, quality, and sense of place that make Carmel unique.

The opportunities ahead are significant: The return of Delta Airlines to the Monterey Regional Airport, continued investment in our lodging properties, Carmel's growing culinary and media profile, and the global attention that will arrive with the U.S. Open at Pebble Beach in June 2027, create an exciting platform for the year ahead. At the same time, increasing competition for travelers makes sustained, strategic destination marketing more important than ever.

We are grateful to our local businesses, community organizations, tourism partners, city leadership, and residents whose collaboration makes Carmel's success possible. Together, we have an opportunity not only to tell Carmel's story to the world, but to thoughtfully shape what tourism looks like here at home.

With gratitude,

Carrie Theis, *Board Chair*

Amy Herzog, *Executive Director*



ABOUT VISIT CARMEL

Visit Carmel is a private, nonprofit 501(c)(6) organization which serves as the official destination marketing organization for Carmel-by-the-Sea. Upon identifying an opportunity to generate supplemental funding in order to accomplish mutually beneficial goals, Carmel-by-the-Sea lodging properties, business leaders and City officials formed the Carmel Hospitality Improvement District (CHID) which began in March 2016.

The CHID is an assessment district proposed to provide specific benefits to payors, by funding marketing efforts. This approach has widespread use in other destinations throughout the country to provide the benefit of additional room night sales directly to assessed lodging businesses. The CHID was renewed in March 2021 for a 10-year term.

Similarly to the CHID, upon identifying an opportunity to generate supplemental funding in order to accomplish mutually beneficial goals, Carmel-by-the-Sea full-service restaurants formed the Carmel Restaurant Improvement District (CRID). In January 2024, the CRID was renewed for a 9½ year term.

Visit Carmel serves as the Owner's Association for both the CHID and the CRID pursuant to the Streets and Highways Code sections 36612 and 36651, and in accordance with each district's Management District Plan.

The formation of both the CHID and the CRID are proactive efforts to provide sustainable and adequate financing for the investment required to increase revenue for Carmel-by-the-Sea's hotels and restaurants and to remain competitive in the tourism market. With other destinations growing their marketing budgets, and with mounting competition for visitor dollars, it is important that Carmel businesses invest in sustainable marketing programs.

More about Visit Carmel including meeting schedule, agendas and minutes are available at *CarmelCalifornia.com/visit-carmel-hid/*

MISSION & OBJECTIVES

The mission of Visit Carmel is to promote Carmel-by-the-Sea as a top-rated, world-renowned destination where one-of-a-kind visitor experiences and discoveries are within walking distance of a variety of charming hotels and restaurants. Visit Carmel is focused on developing integrated destination marketing campaigns that attract off-season and midweek overnight visitors to improve year-round tourism revenue yet retain the natural beauty and integrity of our historic village by the sea. Carmel's beauty, serenity, safety, and charm are assets for businesses and residents alike, and Visit Carmel prioritizes finding the balance between sharing our beautiful village and protecting it.

BOARD OF DIRECTORS

Carrie Theis, *Chair*
Hofsas House
carrie.theis@hofsashouse.com

Mark Watson, *Treasurer*
Inns-by-the-Sea
mark.watson@innsbythesea.com

Susan Dampier, *Secretary*
La Playa/Hotel Carmel
sdampier@marcandrosehospitality.com

Greg Ahn
Seventh & Dolores
greg@folktalewinery.com

Candace Fecteau
Tradewinds/Stilwell Hotel
carmel@larkhotels.com

Rich Pèpe
Pèpe International
pepe@pepeinternational.com

Pam Sheppard
Horizon Inn/Ocean View Lodge
shepcv@icloud.com

Mark Stilwell
Tradewinds/Stilwell Hotel
stilwelm@pebblebeach.com

Brandon Swanson
City of Carmel-by-the-Sea
bswanson@ci.carmel.ca.us

ADVISORY MEMBERS

Chris Morello
Monterey Regional Airport
cmorello@montereyairport.com

Kati Enea
Carmel Chamber of Commerce
kati@carmelchamber.org

Tim Twomey
Carmel Residents Association
timtwomey@aol.com

RESTAURANT MARKETING COMMITTEE

April Montgomery, *Chair*
Links Club
april@linksclubgolf.com

Greg Ahn
Seventh & Dolores
greg@folktalewinery.com

Monique Black
Chez Noir
monique@cheznoircarmel.com

Anthony Carnazzo
Stationæry
anthony@thestationaery.com

Susan Dampier
Bud's and Brophy's Tavern
sdampier@marcandrosehospitality.com

Janet Elarmo
Aubergine
jelarmo@laubergecarmel.com

Gian Pèpe
Pèpe International
gpepe@pepeinternational.com

Sunny Shour
Bud's and Brophy's Tavern
sshour@marcandrosehospitality.com

Ashley Wolff
Jeju Kitchen
ashley@jejukitchencarmel.com

CURRENT BOUNDARY

The CHID includes all lodging businesses and the CRID includes all full-service restaurants located within the boundaries of the City of Carmel-by-the-Sea. There are no proposed boundary changes for 2026-27.



CHID-Assessed Lodging Properties:

1. Adobe Inn
2. Best Western Carmel's Townhouse Lodge
3. Briarwood Inn
4. Candle Light Inn
5. Carmel Bay View Inn
6. Carmel Beach Hotel
7. Carmel Cottage Inn
8. Carmel Country Inn
9. Carmel Fireplace Inn
10. Carmel Garden Inn
11. Carmel Green Lantern Inn
12. Carmel Inn & Suites
13. Carmel Oaks Inn
14. Carmel Resort Inn
15. Carmel Wayfarer Inn
16. Carriage House Inn
17. Casa de Carmel
18. Coachman's Inn
19. Comfort Inn–Carmel-by-the-Sea
20. Cypress Inn
21. Forest Lodge
22. Heron's Lodge
23. Hofsas House
24. Horizon Inn/ Ocean View Lodge
25. Hotel Carmel
26. Lamplighter Inn
27. La Playa Hotel
28. L'Auberge Carmel
29. Le Petit Pali at 8th
30. Le Petit Pali at Ocean
31. Lobos Lodge
32. Monte Verde Inn
33. Normandy Inn
34. Pine Inn
35. Sea View Inn
36. Stilwell Hotel
37. Tally Ho Inn
38. The Homestead
39. Tradewinds Carmel
40. Vagabond's House Inn
41. Wayside Inn

CRID-Assessed Restaurants:

1. Akaoni
2. Alvarado Street Brewery & Bistro
3. Anton & Michel Restaurant
4. Aubergine
5. A.W. Shucks Cocktail & Oyster Bar
6. Barmel / Barmel Supper Club
7. Brophy's Tavern
8. Bud's at La Playa Hotel
9. Cafe Luna
10. Carmel Belle
11. Carmel's Bistro Giovanni
12. Carmel's Hidden Gem
13. Casanova Restaurant
14. Catch
15. Char Steakhouse
16. Chez Noir
17. Cultura Comida y Bebida
18. Dametra Cafe
19. El Bistro by the Sea
20. Enzo Ristorante Italiano
21. Flaherty's Seafood Grill & Oyster Bar
22. Flying Fish Grill
23. Foray
24. Grasing's Coastal Cuisine
25. Grill on Ocean Avenue
26. Hog's Breath Inn
27. Il Fornaio
28. Il Tegamino
29. Jeju Kitchen
30. Katy's Place
31. L'Escargot
32. La Bicyclette
33. Le Souffle
34. Links Club
35. Little Napoli
36. Little Swiss Cafe
37. Mission Bistro
38. Mulligan Public House
39. Nicolás Cocina de Herencia
40. Nora's Comfort Cuisine
41. Pangaea on Ocean Avenue
42. Patisserie Boissiere
43. Pizza Heaven
44. Portabella
45. Rise+Roam
46. Seventh & Dolores Steakhouse
47. Stationæry
48. Sushi Heaven
49. Terry's Restaurant + Lounge
50. The Pocket
51. Tommy's Wok
52. Toro Sushi & Sake
53. Tree House Cafe
54. Tuck Box
55. Vesuvio Restaurant
56. Village Corner
57. VIN by the Sea
58. Yafa

ASSESSMENT METHODOLOGIES

Visit Carmel manages two assessment districts—the Carmel Hospitality Improvement District (CHID) and the Carmel Restaurant Improvement District (CRID).

FY 2026-27 Projected Funding

CHID	$2,086,467
CRID	$353,393
Other	$55,812
Subtotal*	**$2,495,672**

* Excluding Cash Reserves

Carmel Hospitality Improvement District (CHID)
The CHID annual assessment rate is two percent (2%) of gross short-term (less than 31 days) room rental revenue. The assessment is levied upon and a direct obligation of the assessed lodging business which may, at its discretion, pass the assessment on to transients. The City is responsible for collecting the assessment on a bi-monthly basis from each lodging business. More detail on the assessment methodology can be found in the CHID Management District Plan* dated August 1, 2020.

Carmel Restaurant Improvement District (CRID)
The CRID annual assessment rate is one-quarter of one percent (0.25%) of gross food and drink sales revenue. The assessment is levied upon and is a direct obligation of the assessed restaurant business which may, at its discretion, pass the assessment on to customers. The City is responsible for collecting the assessment on a quarterly basis from each full-service restaurant. More detail on the assessment methodology can be found in the CRID Management District Plan,** dated July 11, 2023.

Tourism Economy & Travel Trends
Tourism is vital to Carmel-by-the-Sea and generates a substantial portion of the City's revenue. Approximately 54% of the City's budget relies on tax revenues generated by visitor spending, primarily transient occupancy tax (TOT) and sales tax.

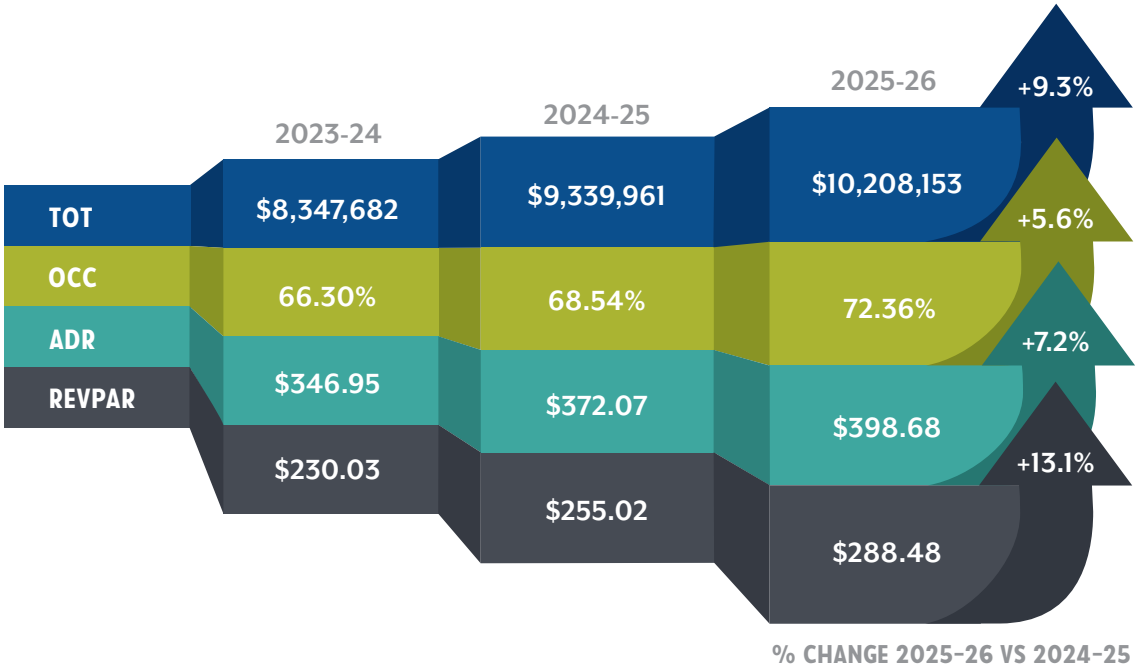
Travel and tourism are a major economic engine for California and Monterey County. In 2025, visitor spending in Monterey County reached a record $3.3 billion, a 4.1% increase over 2024, while visitor-generated state and local tax receipts reached a record $346 million, up 6.1%. Tourism supported approximately 28,000 jobs countywide.***

Carmel-by-the-Sea is well positioned to benefit from continued demand for distinctive, high-quality leisure experiences.

*https://www.carmelcalifornia.com/userfiles/file/Carmel_CHIDRenewal_ManagementDistrictPlan_10_6_20.pdf
**https://www.carmelcalifornia.com/userfiles/file/MDP_CarmelRID_Final2024-2033.pdf
***https://www.seemonterey.com/wp-content/uploads/The-Economic-Impact-of-Travel-Monterey-County-2025-Preliminary-Estimates.pdf

TOURISM & LODGING PERFORMANCE

Fiscal year 2025-26 ended with a record $10.2 million in TOT revenue for the City of Carmel, representing a 9.3% increase over the prior year. That unprecedented growth is a result of both a 5.6% increase in occupancy across hotel lodging, as well as a 7.2% growth in average room rate. Together, these gains drove a 13.1% increase in RevPAR to $288.48. The results reflect continued demand for Carmel-by-the-Sea and the effectiveness of sustained destination marketing efforts designed to drive overnight visitation throughout the year. This follows a prior year of record growth in TOT revenue thanks to a healthy re-investment in lodging properties by hotel owners and high resulting room rates due to the improved product.



Stronger performance beyond the traditional peak season is particularly important to maintaining a more balanced and sustainable tourism economy, benefiting the City and the broad range of businesses that rely on visitor spending. The following bimonthly breakdown reflects the destination's strong year-over-year occupancy growth during the traditionally slower winter and spring months, reaching a notable 76% occupancy rate during March and April coupled with a substantial increase in ADR. While the destination was impacted favorably by the opening of Hwy 1 after a 3-year closure as well as a lack of snow in competing mountain destinations, this performance demonstrates the growing strength of Carmel as a year-round destination and the impact of continued efforts to drive visitation beyond the peak summer season.

FY 2025–26 Bi-Monthly Breakdown (% Change YOY)

	July-Aug	Sept-Oct	Nov-Dec	Jan-Feb	Mar-Apr	May-June
TOT	$2,375,906 +4%	$1,851,231 +5%	$1,210,923 +1%	$1,083,315 +10%	$1,680,432 +23%	$2,006,346 +16%
Occ.	83.70% +3%	76.74% +3%	59.34% +3%	57.85% +8%	76.16% +11%	80.37% +6%
ADR	$478.42 +6%	$416.93 +7%	$352.89 +2%	$333.92 +4%	$380.75 +13%	$429.18 +11%
RevPAR	$400.44 +9%	$319.95 +10%	$209.41 +5%	$193.17 +12%	$289.98 +25%	$344.93 +18%

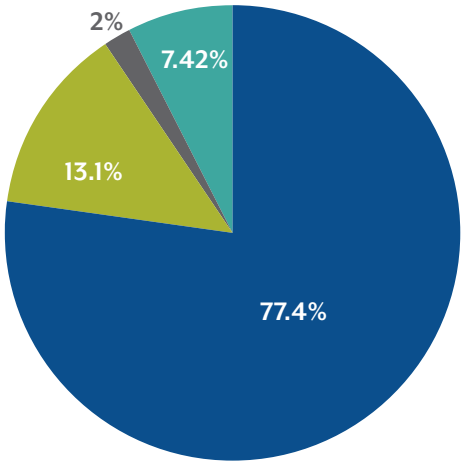
FINANCIAL SUMMARY & FY 2026–27 BUDGET

The FY 2026–27 budget reflects a positive outlook for Carmel-by-the-Sea's tourism economy and continued strength in visitor-generated revenues. Following another strong year of growth, Visit Carmel enters the new fiscal year with a solid revenue base. Total budgeted revenue is $2.70 million, including $2.09 million in CHID assessments and $353,393 in CRID assessments.

Restaurant assessment revenue is expected to remain strong, supported by continued visitor spending and healthy lodging performance. For the first time in nearly a decade, the City of Carmel-by-the-Sea is not providing a direct financial contribution to destination marketing. As a result, the CHID and CRID assessments, together with Visit Carmel's other resources, are increasingly important to sustaining a coordinated marketing program that supports visitation and the broader visitor economy.

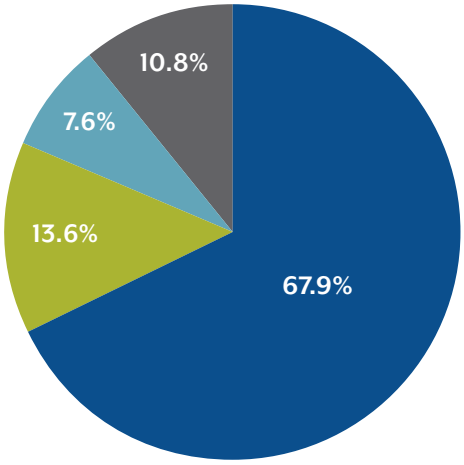
Visit Carmel is also contributing $200,000 from its cash reserve balance to the FY 2026–27 budget, providing additional resources to support strategic marketing initiatives while maintaining a prudent approach to financial management.

The FY 2026–27 budget positions Visit Carmel to build on the momentum of the past year. With tourism performing well but competition for visitors intensifying, maintaining a consistent and coordinated marketing presence remains essential to keeping Carmel-by-the-Sea top of mind, protecting its share of visitor spending, and supporting the long-term economic vitality of the community.



2026-27 BUDGET REVENUE

CHID Assessment	$2,086,467
CRID Assessment	$353,421
City of Carmel-by-the-Sea	$0
Other	$59,466
Use of Cash Reserve	$200,000
TOTAL REVENUE	$2,699,354



2026-27 BUDGET EXPENDITURES

Marketing	$1,831,638
Public Relations/Social Media	$368,400
Sales & Promotion	$206,360
Administrative	$292,717
TOTAL EXPENDITURES	$2,699,115

Beginning Reserve Balance	$903,890
Projected Ending Reserve Balance	$704,130

2025–26 YEAR-END FINANCIAL REPORT

Visit Carmel

Balance Sheet

As of June 30, 2026

	TOTAL
ASSETS	
Current Assets	
Bank Accounts	
1060 Pinnacle Bank Ckg	190,797.09
1062 Pinnacle Bank Svgs	12,773.63
1064 Pinnacle Bank MMA	100,123.36
1065 Pinnacle Bank MMA Cash Mgr	600,136.38
Total Bank Accounts	**$903,830.46**
Other Current Assets	
1200 Undeposited Funds	0.00
Total Other Current Assets	**$0.00**
Total Current Assets	**$903,830.46**
Fixed Assets	
1500 Furniture and Equipment	0.00
1510 Accumulated Depreciation	0.00
Total Fixed Assets	**$0.00**
TOTAL ASSETS	**$903,830.46**
LIABILITIES AND EQUITY	
Liabilities	
Current Liabilities	
Other Current Liabilities	
2100 Payroll liabilities	0.00
2200 Prepaid Seminar Fees	0.00
2210 Sales Tax Payable	0.00
Total Other Current Liabilities	**$0.00**
Total Current Liabilities	**$0.00**
Long-Term Liabilities	
2725 SBA EIDL Funded 7/27/20	0.00
Total Long-Term Liabilities	**$0.00**
Total Liabilities	**$0.00**
Equity	
300 Opening Balance Equity	0.00
32000 Unrestricted Net Assets	967,679.70
Net Revenue	-63,849.24
Total Equity	**$903,830.46**
TOTAL LIABILITIES AND EQUITY	**$903,830.46**

CERTIFICATION OF FINANCIAL STATEMENTS

In accordance with Visit Carmel bylaws, this letter certifies that the financial statements included in this report were prepared by an authorized officer of the corporation from its books and records, and were not independently audited.



Mark Watson

Visit Carmel Treasurer

2025-26 OVERVIEW & 2026-27 STRATEGIC MARKETING PLAN





STRATEGIC PRIORITIES FOR FY 26-27

Visit Carmel uses a strategic and integrated approach to destination marketing based on these specific objectives:

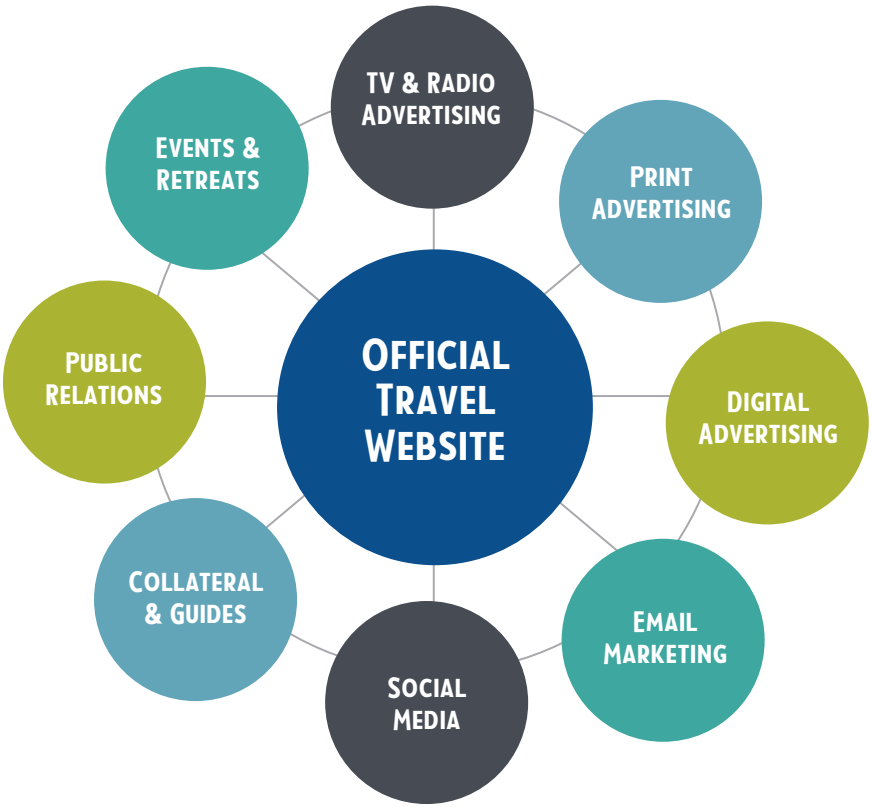
- Target high-value, multi-day visitors who live in our primary drive and fly markets: San Francisco Bay Area, Los Angeles region, Sacramento, and Fresno—along with Dallas, Denver, Phoenix, Seattle, San Diego, Salt Lake City, and Chicago.
- Increase visitation during the off-season from November–May and midweek from Sunday–Thursday.
- Encourage visitors to book hotel reservations direct via the official travel website (www.CarmelCalifornia.com) to increase hotel revenue and reduce commissions paid to third-party online travel agencies (OTAs).
- Brand and promote Carmel-by-the-Sea as a world-class destination by focusing on brand pillars which include natural beauty, food & wine, arts & culture, wellness & fitness, and responsible travel.
- Continue to tell fresh stories through new brand campaigns, imagery, events, and paid, earned and owned media.

MARKETING PARTNERSHIP

The destination marketing planning and execution of all advertising, public relations, and social media is a collaboration between the Carmel Hospitality Improvement District (CHID) and Carmel Restaurant Improvement District (CRID). Final decisions are made by the Visit Carmel Board of Directors.

OUR VISION

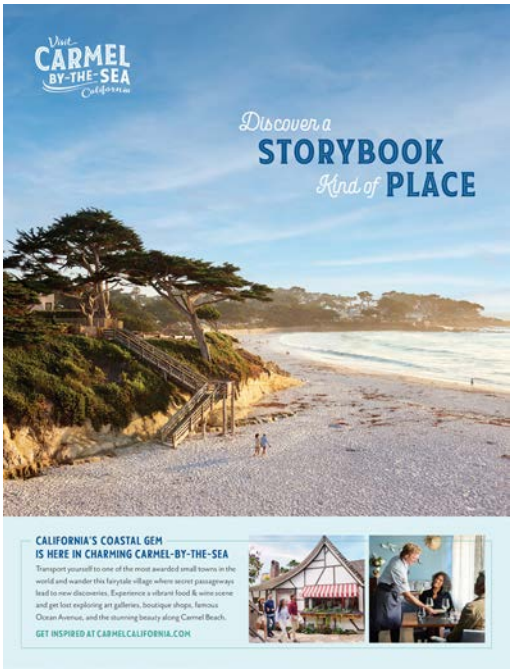
A commitment to promote safe, responsible, and respectful travel which, in turn, safeguards the vital components of our community for a vibrant future.

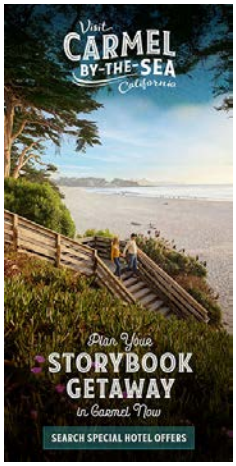




VISIT CARMEL'S STORYBOOK BRAND CAMPAIGN ELEVATES CARMEL-BY-THE-SEA AS CALIFORNIA'S COASTAL GEM AND DELIVERS RECORD RESULTS AGAIN THIS YEAR

The "Discover a Storybook Kind of Place" Brand Campaign was created to highlight Visit Carmel's most defining quality—its whimsical, storybook charm set against a backdrop of breathtaking coastal beauty. By positioning Carmel-by-the-Sea as "California's Coastal Gem," the campaign connects the village's enchanting character and stunning scenic beauty to the larger California travel brand, reinforcing its image as a truly one-of-a-kind destination. Supported by an integrated marketing strategy and expanded media presence, the campaign continued to gain momentum in FY 2025–26, driving strong digital performance, increasing new website users, and generating significant growth on the Hotel Specials landing page.

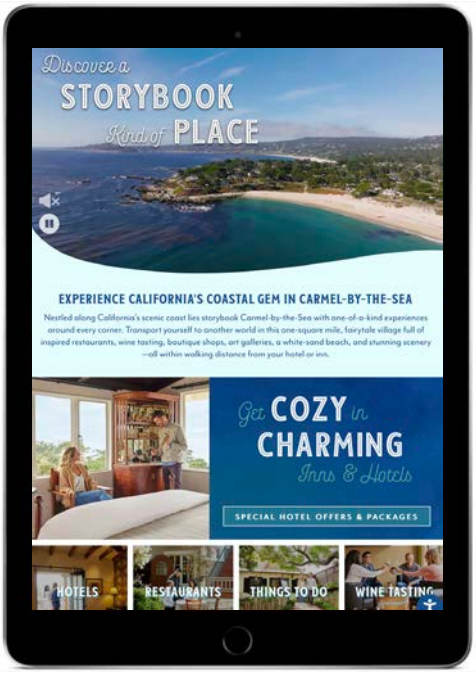










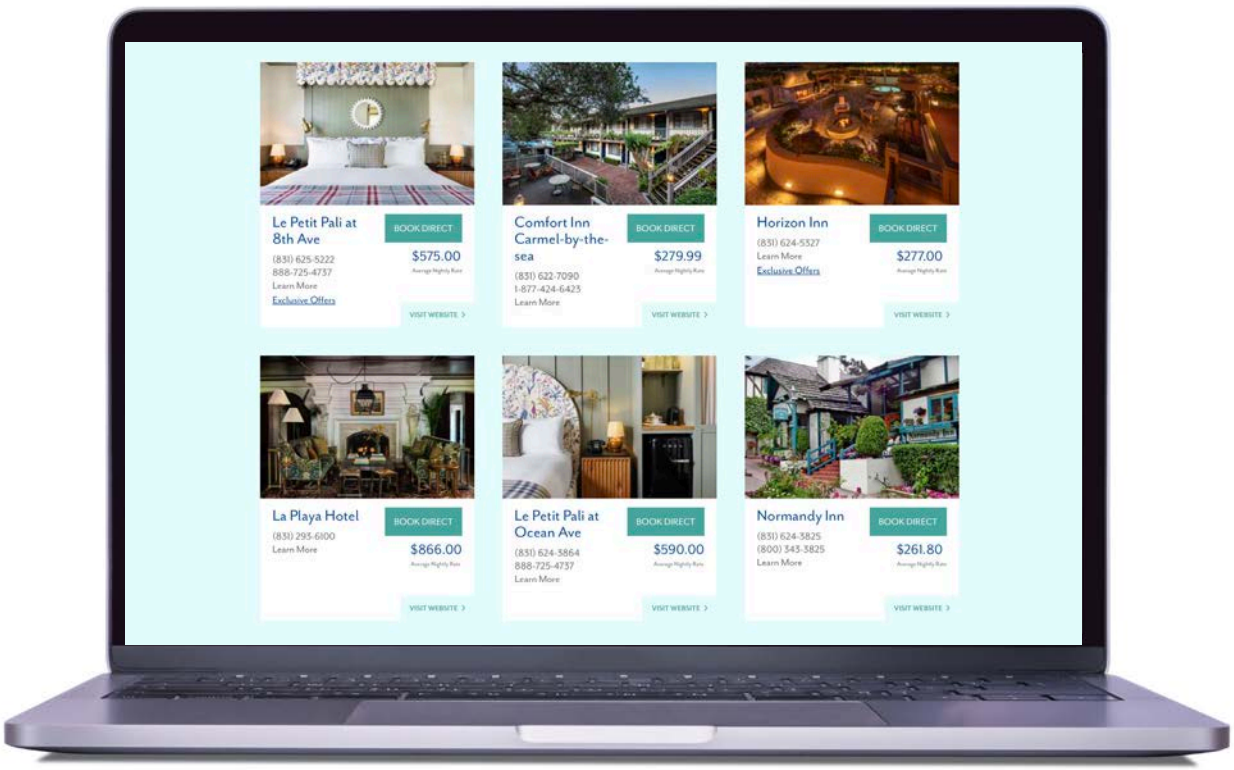


1.7 MILLION
Website New Users
+2.3% YOY Increase

482,287
Hotel Offers Page Visits
+30.2% YOY Increase

INCREASED WEBSITE REFERRALS TO CARMEL HOTELS & INNS ACHIEVE RECORD OCCUPANCY AND TAX REVENUE RESULTS

At the heart of Visit Carmel's integrated marketing strategy is swiftly moving website visitors directly to Carmel hotel and inn websites to book directly. This streamlined web referral approach delivers substantial hotel web bookings each year—contributing to record hotel occupancy and tax revenue in FY 2025–26 which achieved historic gains during the second half of the fiscal year.



Hostelry Average Daily Occupancy Rate - Bi-Monthly

How many rooms, on average, are occupied daily within the City during the reporting period?

Fiscal Year	Jul-Aug	Sep-Oct	Nov-Dec	Jan-Feb	Mar-Apr	May-Jun	Annual Avg.
2024-25	81.65%	74.72%	57.37%	53.46%	68.36%	75.70%	68.54%
2025-26	83.70%	76.74%	59.34%	57.85%	76.16%	80.37%	72.36%
% change vs LY	**2.51%**	**2.71%**	**3.43%**	**8.20%**	**11.41%**	**6.17%**	**5.57%**

Average Hotel Occupancy Rate 72.36% (+5.57% YOY Increase)

Receipts of Hostelry Tax - Bi-Monthly

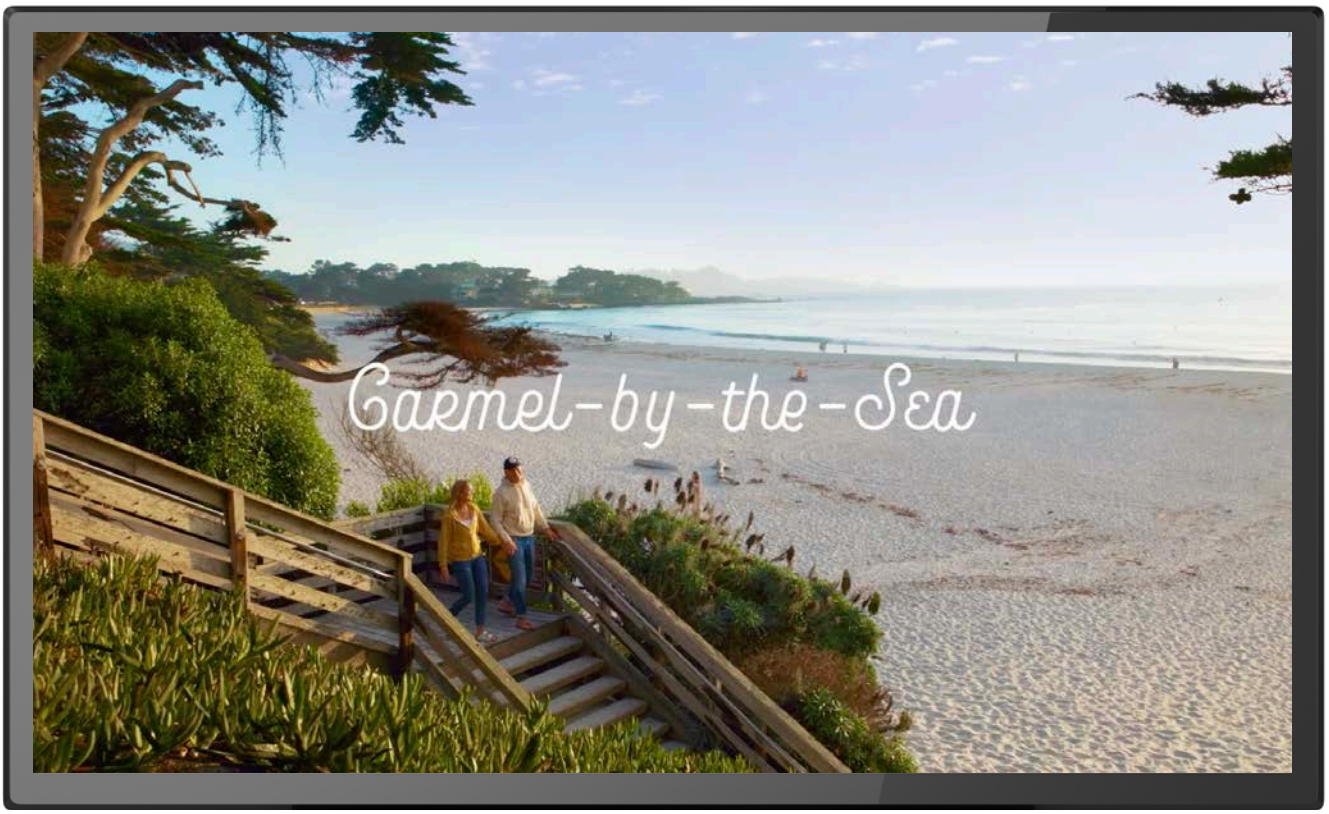
How much Hostelry Tax was collected by the City for the reporting period?

Fiscal Year	Jul-Aug	Sep-Oct	Nov-Dec	Jan-Feb	Mar-Apr	May-Jun	Annual Total
2024-25	$ 2,290,176	$ 1,769,436	$ 1,202,872	$ 984,305	$ 1,368,398	$ 1,724,775	$ 9,339,961
2025-26	$ 2,375,906	$ 1,851,231	$ 1,210,923	$ 1,083,315	$ 1,680,432	$ 2,006,346	$ 10,208,153
% change vs LY	**3.74%**	**4.62%**	**0.67%**	**10.06%**	**22.80%**	**16.33%**	**9.30%**

Total TOT Revenue $10,208,153 (+9.30% YOY Increase)

CARMEL'S STORYBOOK CHARM REACHES MILLIONS ON BROADCAST AND CONNECTED TV, DRIVING OFF-SEASON VISITATION FROM CORE DRIVE AND FLY MARKETS

Top-rated broadcast TV programming targets our primary overnight visitor markets of the San Francisco Bay Area, Los Angeles region, and Sacramento. Connected TV expands our reach across both core drive and fly markets, adding Dallas, Denver, Phoenix, San Diego, and Seattle. In addition, Connected TV retargets website visitors, extending our campaign reach to prospective visitors nationwide.



NBC BAY AREA · TODAY · abc7 BAY AREA · GOOD MORNING AMERICA · KPIX 5 SF BayArea · KCRA 3 · KTVU FOX 2 · effectv · HGTV · food network · CNN · GOLF · Hallmark CHANNEL

mntn

Mountain CTV Prospecting Targets Drive and Fly Markets, plus Reaches Nationally with Remarketing. It also provides "Verified Website Visits" that tracks website traffic generated by CTV views.

19.1 MILLION
TV & CTV Total Impressions
-39% YOY Decrease*

1.3 MILLION
CTV Households Reached
+8.3% YOY Increase

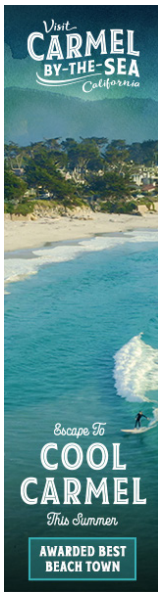
* Decreased Linear TV & Connected TV Impressions are a result of a higher CTV cost-per-spot as well as more targeted Linear TV buys. While CTV impressions were lower, it reached more qualified households through AI optimizations.













TARGETED DIGITAL CAMPAIGNS ATTRACT QUALITY VISITORS & DELIVERS RESULTS

Visit Carmel's digital-first media strategy continues to be the leading driver of website traffic that converts into hotel bookings. In FY 2025–26, targeted digital campaigns focused on quality-over-quantity by reaching the right visitors who are more seasoned, conscious travelers.

Google Meta

76 MILLION
Total Impressions
-38% YOY Decrease*

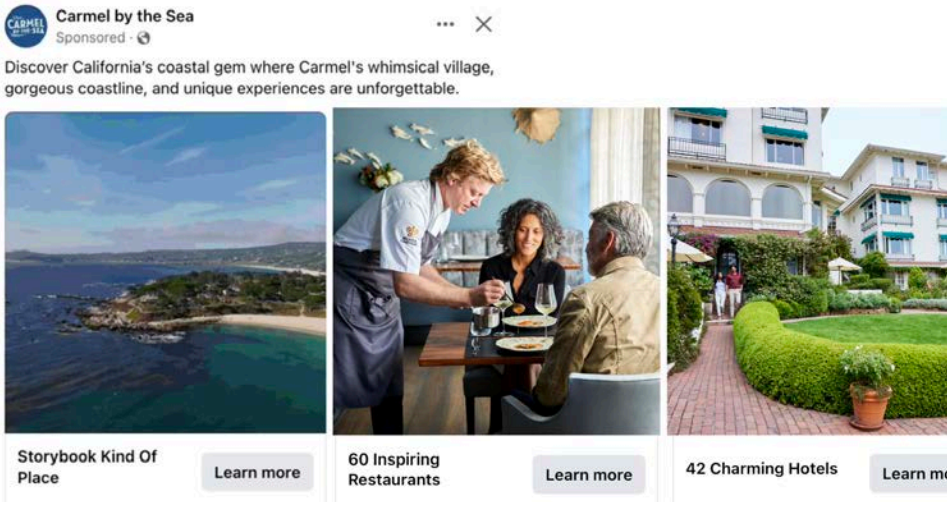
1.7 MILLION
Total Clicks
+9% YOY Increase

8.2 MILLION
Total Engagements
+2.2% YOY Increase

* Despite the decrease in Digital Media Impressions, the Total Clicks achieved strong growth along with engagements—demonstrating a more qualified audience in our effort to attract quality over quantity.







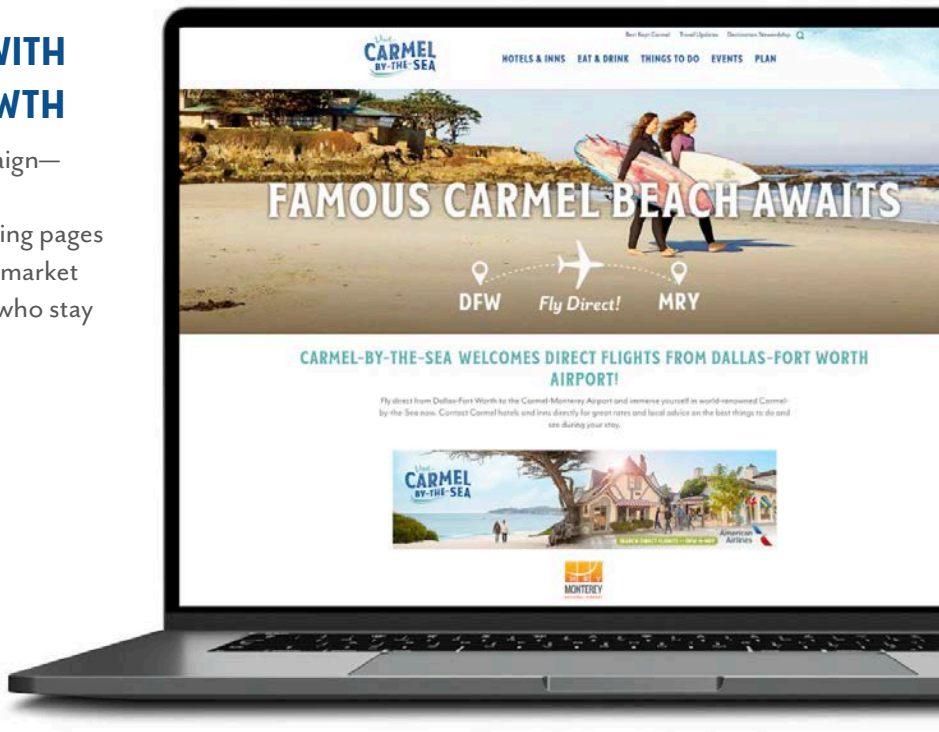


FLY MARKET CAMPAIGN SOARS WITH CONTINUED LANDING PAGE GROWTH

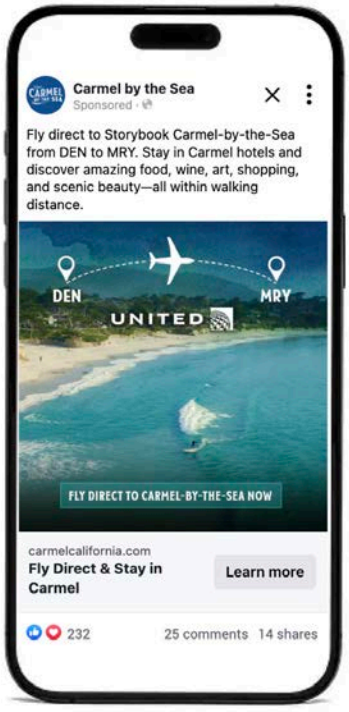
Through Visit Carmel's integrated digital campaign—spanning Facebook, Instagram, and Mountain Connected TV—traffic to the six Fly Direct landing pages achieved double-digit growth. This targeted fly market campaign attracts high-value overnight visitors who stay longer and spend more.

LANDING PAGE GROWTH

Phoenix (PHX)	+36%
Denver (DEN)	+40%
Dallas (DFW)	+52%
Seattle (SEA)	+33%
San Diego (SAN)	+44%
Chicago (ORD)	*New This Year*





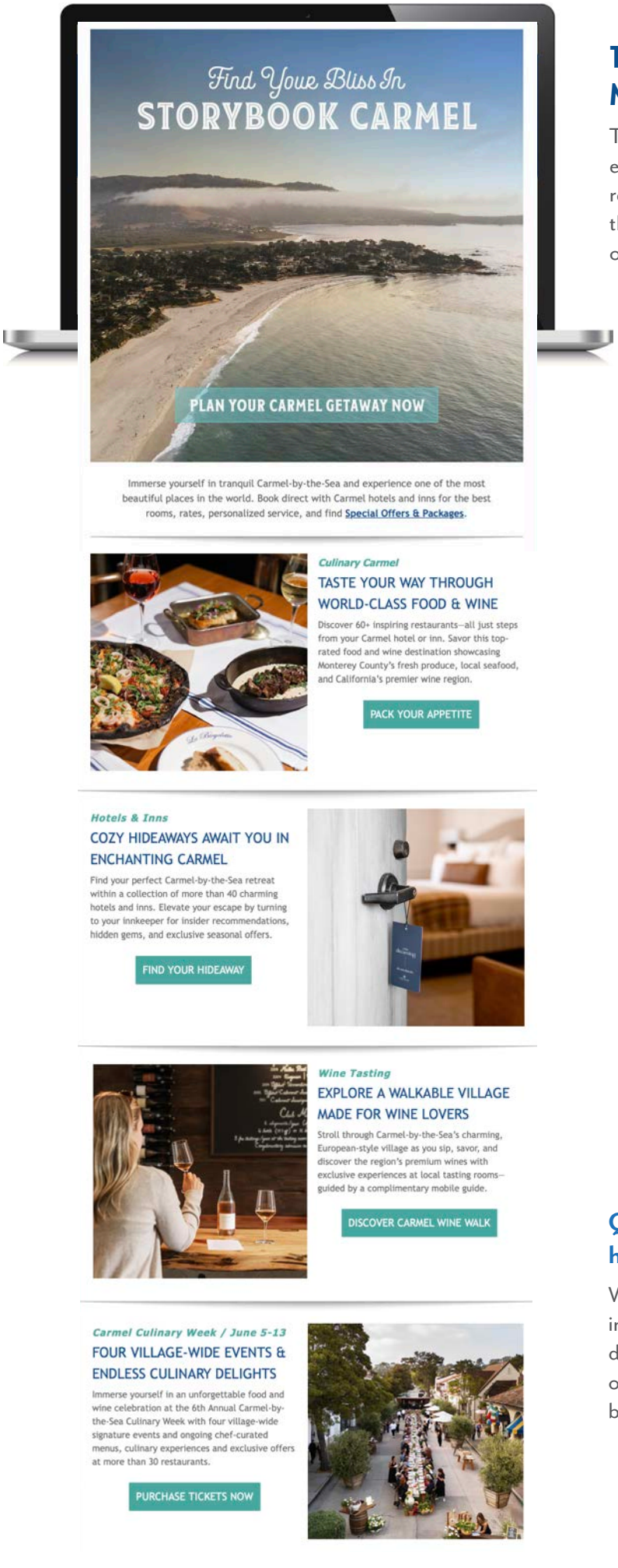


Meta

418,281
Total Website Clicks
+26% YOY Increase

mntn

25,687
Verified Website Visits
+27% YOY Increase



TOP PERFORMING EMAIL MARKETING PERFORMANCE

The image-driven design and engaging content delivers exceptional performance with each deployment and reaches a highly qualified, opt-in audience of more than 90,000 consumers. As a result, the campaign outperforms the travel industry average.

Best Open Rate	*Best Click Through Rate*
39.9%	6.5%
Industry Avg. 20.44%	*Industry Avg. 2.62%*
(Mailchimp.com)	*(Mailchimp.com)*



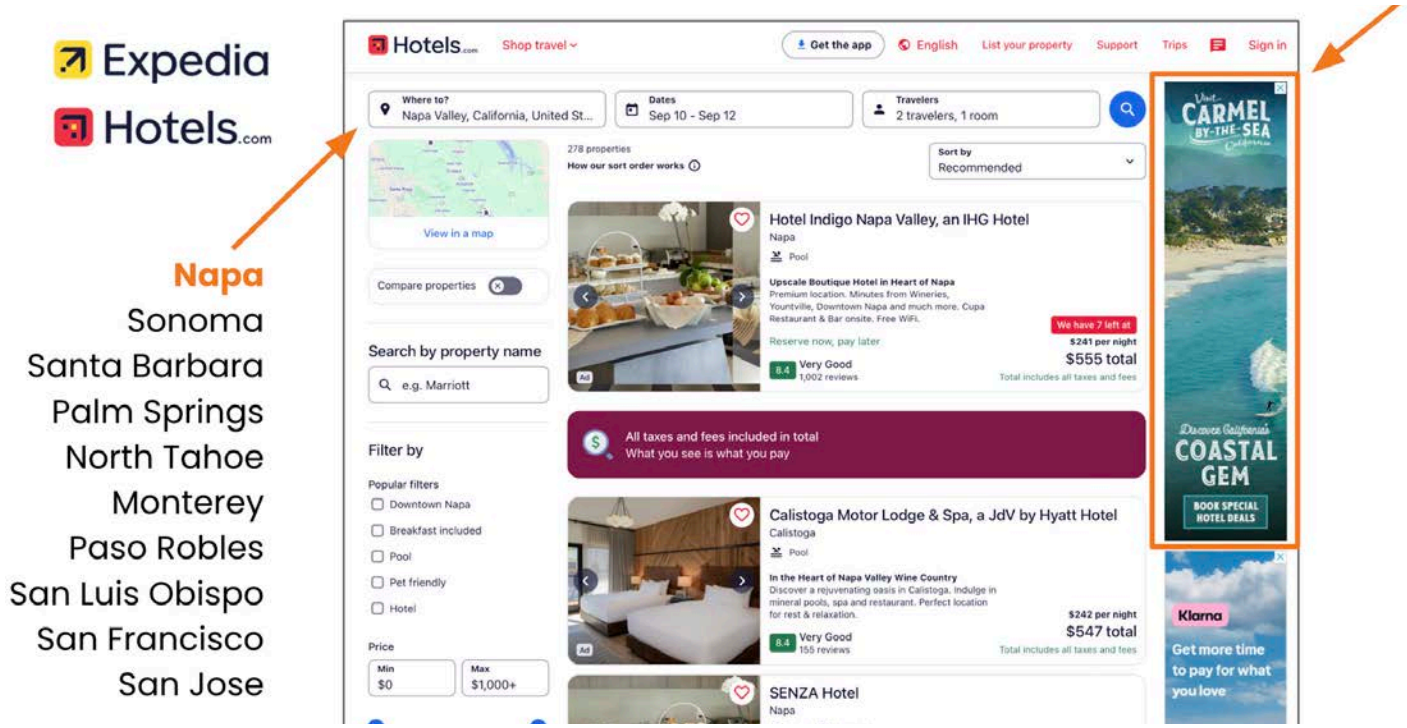
Qualified clicks mean business for Carmel hotels, restaurants, shops, and more!

With numerous clickable buttons, images, and navigation included in the content blocks, e-newsletter deployments drive clicks that lead to bookings and purchases. Plus, our email audience is the most loyal and provides the best source for increasing return visitors.



CONQUESTING ADS CONVERT COMPETITOR SEARCHES INTO CARMEL-BY-THE-SEA HOTEL BOOKINGS

Many travelers remain loyal to Online Travel Agencies (OTAs) like Expedia and Hotels.com when booking hotels and resorts. Visit Carmel's conquesting digital media strategy targets these high-intent consumers by intercepting searches for competing destinations such as Napa, Santa Barbara, and San Luis Obispo—and redirecting them to Carmel-by-the-Sea hotel bookings.



Ad Spend	Impressions	Clicks	CTR	Revenue	ROAS
$95,602	5.5M	6,925	0.12%	$1.2M	12.5

$95,602 Ad Spend = $1.2 Million Hotel Revenue / +55.6% YOY Increase and 12.5x ROAS



FY 2025-26 MEDIA MIX

This past year's media mix remained a digital-first strategy with an "always on" focus to increase year-round website traffic and visitation. Traditional print and broadcast TV were added for multi-media brand campaigns to drive shoulder and off-season awareness and hotel bookings. In addition, Connected TV through Mountain (MNTN) used an "always on" strategy to expand Carmel's visitor base nationwide with an emphasis on the primary drive and fly markets.

DIGITAL

54%

Google
facebook
Instagram
YouTube
Expedia
LOCALE
edible

PRINT

11%

Sunset
SAN DIEGO
San Francisco Chronicle
Carmel magazine
The Carmel Pine Cone
MONTEREY COUNTY WEEKLY

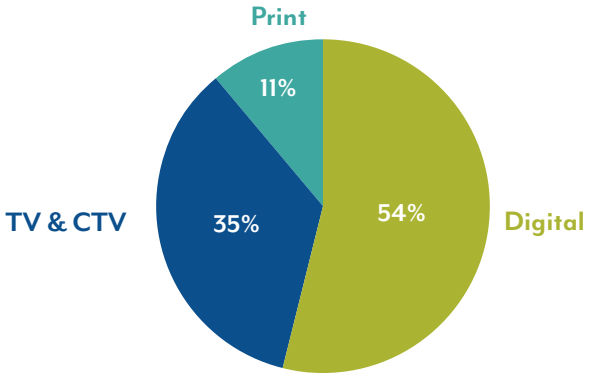
TV & CTV

35%

mntn
TODAY
GOOD MORNING AMERICA
NBC BAY AREA
abc7 BAY AREA
KCRA 3 SACRAMENTO
COMCAST
CNN
food network
GOLF
HGTV
KSBW

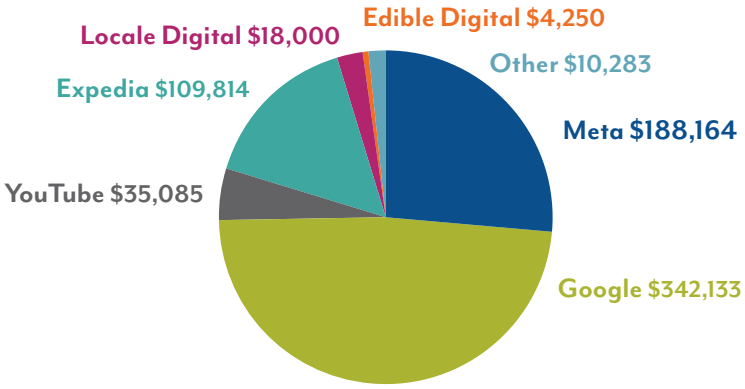
FY 2025-26 Overall Media Mix

This full-funnel media mix emphasizes digital media and combines linear/connected TV and print to maximize brand awareness, increase engagement, and drive bookings and sales.



FY 2025-26 Digital-First Media Mix

Google, Meta, and YouTube focus on impressions, clicks, and engagement, while Expedia delivers Return On Ad Spend (ROAS) reporting with actual hotel booking revenue.



CARMEL CULINARY & RESTAURANT ONGOING MARKETING

Custom website, digital advertising, dining guide, eblasts, PR & social media make Carmel-by-the-Sea a top-rated food destination.

As part of the CRID marketing program, a year-round integrated restaurant campaign attracts both visitors and locals to dine at Carmel restaurants. This image and video-driven campaign elevates the overall culinary destination image for Carmel and positions it as "California's Food & Wine Paradise."





Google Meta

5.3 Million Impressions
61,629 Total Clicks
471,616 Total Engagements

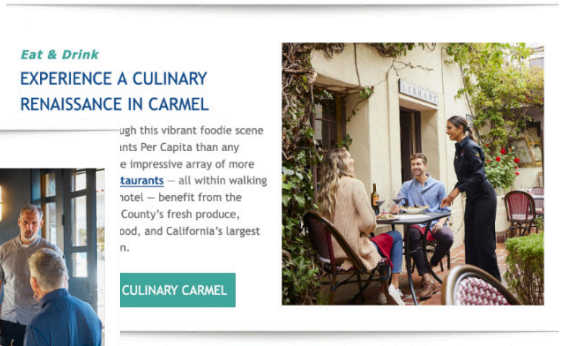
85,000 Dining Guides

A total of about 3,750 Dining Guides are printed quarterly and distributed regularly to Carmel Hotels, Visitor Center, Monterey Airport, and top area hotels. Plus, this 8-page guide is printed in *Carmel Magazine* 2x a year for a total of 70,000+ circulation.

Monthly eNewsletters Reach more than 90,000+ Opt-in Subscribers

Food and wine content is a key pillar in Visit Carmel's monthly email marketing which links to all the restaurants and wine tasting rooms.

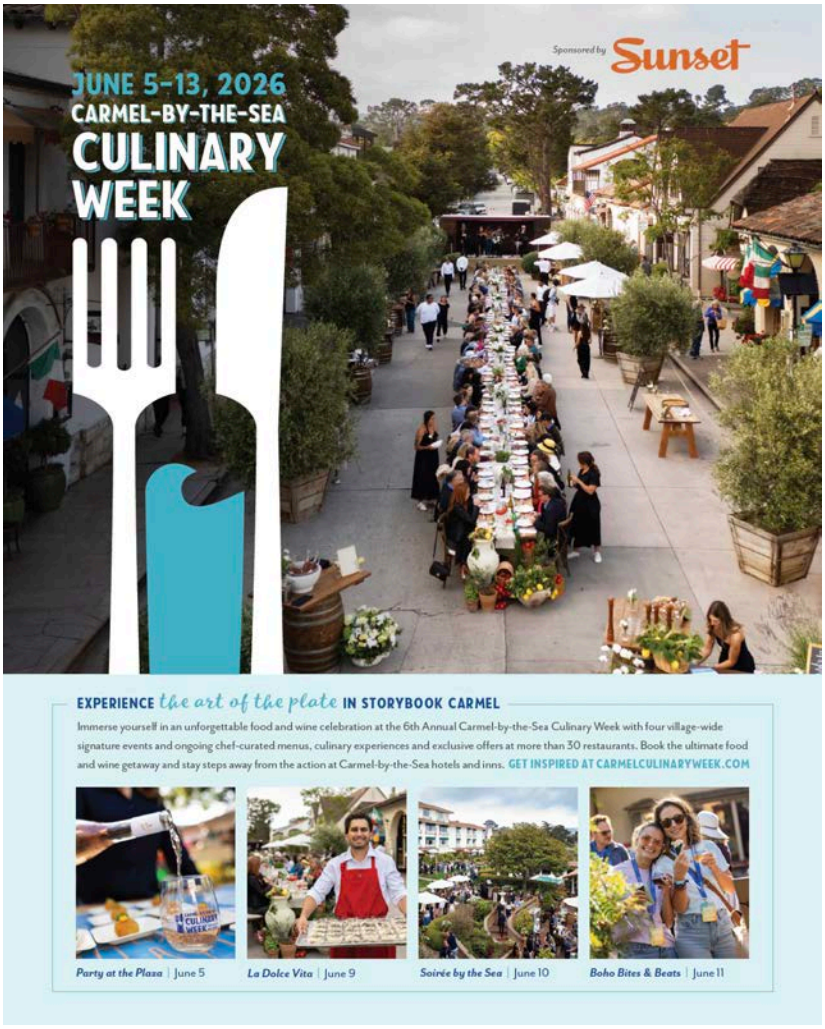




A TASTE OF SUCCESS: CARMEL CULINARY WEEK SERVES UP ITS MOST FLAVORFUL YEAR YET

The 6th Annual Carmel Culinary Week transformed the village into a vibrant celebration of food, wine, and community. The nine-day festival brought back four citywide events that wowed attendees with creative culinary pairings, live entertainment, and signature Carmel charm. Tickets were sold out for the signature events, drawing guests from across California, the U.S., and the local community. More than 30 restaurants and nearly 20 wineries participated, offering special menus and exclusive tastings at their restaurants throughout the village. The event also reinforces Carmel's reputation as a hub for exceptional food and wine experiences, helping generate year-round interest among culinary-minded travelers.







Google Meta

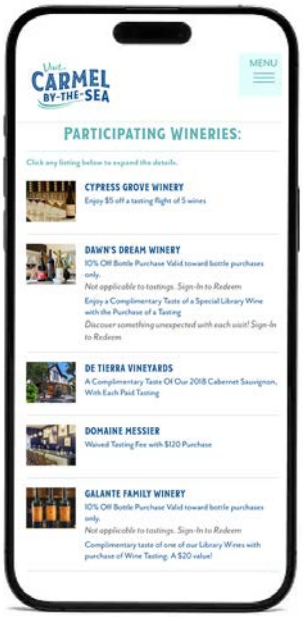
1.7 Million Impressions
98,602 Total Clicks
630,689 Total Engagements

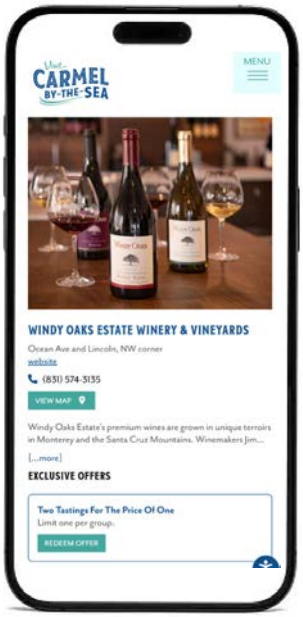
mntn

289,449 CTV Commercials
16,145 Verified Web Visits

Sunset

1.2 Million Print Circulation
900,000 Digital Reach





CARMEL WINE WALK

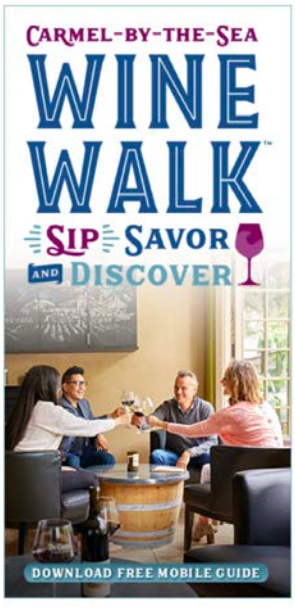
Custom Carmel Wine Walk app, website, digital advertising and brochure make Carmel a "wine lover's destination" and "crown jewel" of Monterey County wine country.

The Carmel Wine Walk app and website promote exclusive offers and experiences at participating tasting rooms. This custom program is promoted year-round using digital advertising, PR, social media, and brochure distribution. The app recorded 803 tasting redemptions during the fiscal year. However, many visitors do not check-in through the app, so the total redemptions are estimated to be more than 2,000 over the 12-month period.

10,000+ Brochures
distributed regularly to Carmel Hotels, Carmel Visitor Center, Monterey Airport, and top area hotels.







Google Meta

6.7 Million Impressions
61,843 Total Clicks
115,213 Total Engagements

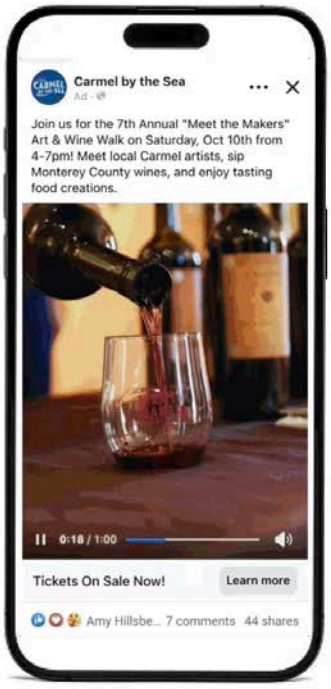


CHEERS TO AN INSPIRING 7TH ANNUAL "MEET THE MAKERS" ART & WINE WALK

Celebrating the local artist-owned galleries that carry on Carmel's bohemian art colony heritage, Visit Carmel unites the Carmel Art Walk and Carmel Wine Walk to invite the public to connect, socialize, and discover local art and wine. This year's integrated advertising, social media, and PR efforts attracted visitors from across California while cultivating strong local engagement.

- **421 Ticketed Attendees** (Sold Out / Goal 400)
- **19 Local Artist-Owned Galleries**
- **15 Local Wineries**
- **6 Local Food Crafters**
- **8 Local Musicians**





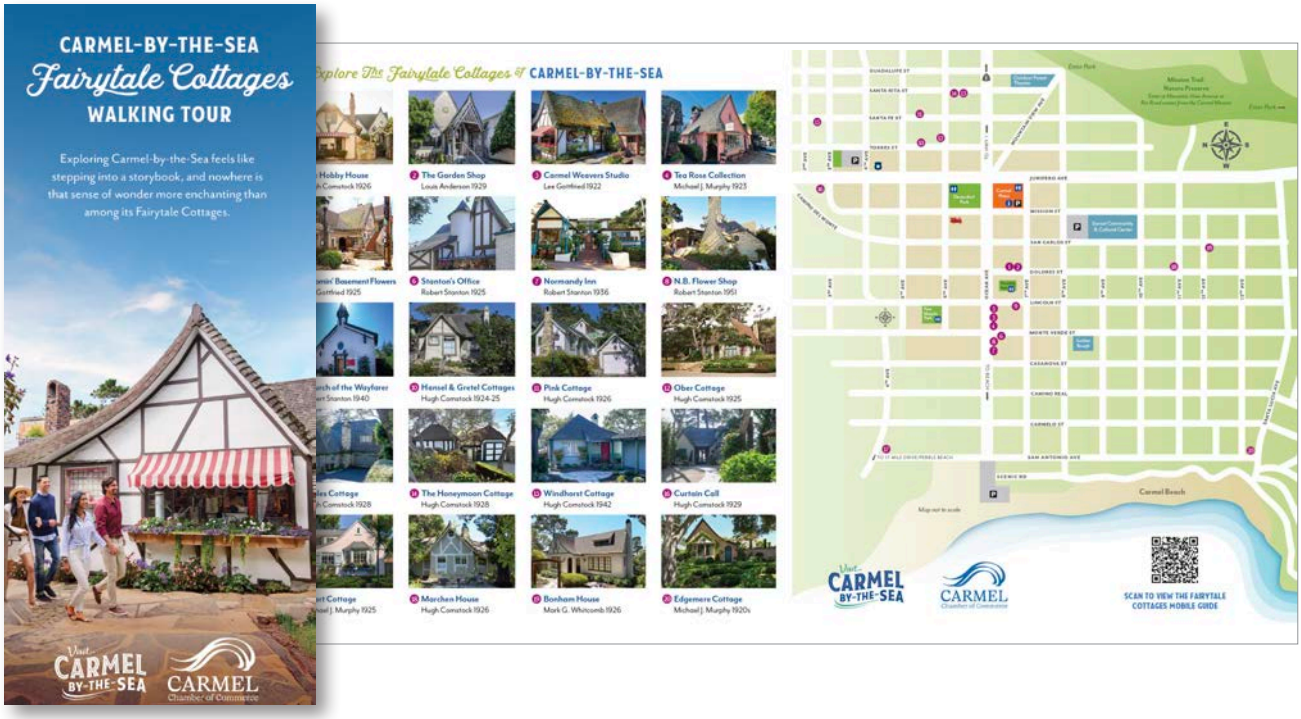




EXCLUSIVE GUIDES & BROCHURES TO ENRICH THE VISITOR EXPERIENCE

The *Official Visitor Guide & Map* (on the left) is Visit Carmel's primary fulfillment brochure for potential and visitors already in Carmel. It is distributed at more than 60 locations and designed to showcase the destination. The *Scenic Runs, Hikes & Walks* guide and new *Best of Big Sur* guide are found exclusively at Carmel hotels and provide guests with locally curated experiences. Lastly, the new *Fairytale Cottages Walking Tour Guide* is the most recent addition and perhaps the most requested brochure at the Carmel Visitor Center.







FY 2025-26 EARNED MEDIA

Also known as public relations, earned media elevates brand awareness, amplifies brand messaging, and inspires potential visitors with its innate third-party credibility. Visit Carmel focuses on a three-tiered approach to reach target audiences:

- Targeted regional and national media relations to drive earned media coverage with meaningful reach
- Generation of meaningful, KPI message-rich coverage that supports SEO and GEO efforts
- Brand building PR that expands upon Carmel-by-the-Sea's reputation as a world-class destination



Earned Media Coverage Results:

2.2B
Total Reach

20.8%
Average Share-of-Voice

115
Quality Earned Media Placements

25
Hosted Media/ Influencer Visits

94
Average Barcelona Principles Score
(94 out of 100)

Condé Nast Traveler
TRAVEL+ LEISURE
Sunset
Forbes
San Francisco Chronicle
ELLE

Earned Media Coverage Results: FY 2025–26 Key Media Placements

The Fall Getaway That's Perfect for Your Personality Type, *Parade*

Inn Tours with a room for a Holiday Getaway, *San Francisco Chronicle*

California's Most Charming Small Towns for a Quiet Holiday Retreat, *Observer*

I've Taken 20+ Road Trips in California — This Is the One I Keep Coming Back To for the Best Food, Wine, and Scenic Views, *Travel + Leisure*

Take a Restorative Staycation at These Wellness-First Retreats, *Sunset Magazine*

Sea Change (6-pg feature on Carmel), *Travel + Leisure*

A Snob's Guide to Escaping L.A. for the Weekend, *Town & Country*

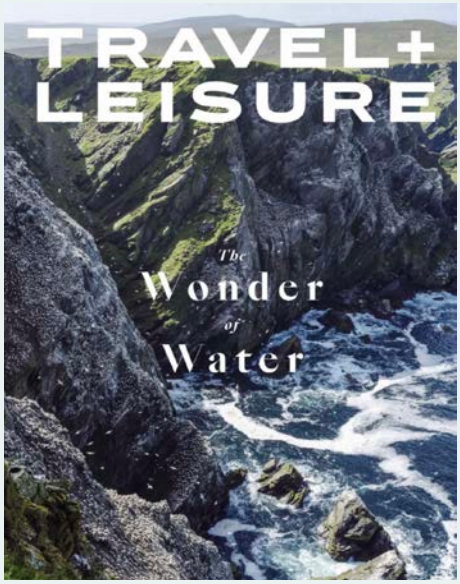
Most Delicious Food & Wine Festivals Along California's Highway 1, *Forbes*

This Charming California Beach Town Is Hosting a Weeklong Food Festival With 30 Restaurants and Unique Dining Events, *Travel + Leisure*

Michelin-lauded Carmel Restaurant is Selling Out of Favorites by 10 a.m., *SF Gate*

California Roadtrip: Carmel-By-The-Sea, *LA Magazine*

ELLE Escapes: Carmel-by-the-Sea, *ELLE*




Sea Change




courtesy of Visit Carmel, Palisociety, Getty

CULTURE > TRAVEL & FOOD

ELLE Escapes: Carmel-by-the-Sea

It feels straight out of a fairy tale.

BY SARA AUSTIN, MARKET BY MEG DONOHUE AND EMMA AERIN BECKER PUBLISHED: JUN 30, 2026


TRAVEL+ LEISURE

TRIP IDEAS DESTINATIONS WORLD'S BEST AWARDS HOTELS + RESORTS TRAVEL PRODUCTS LUXURY STYLE VIDEOS

This Charming California Beach Town Is Hosting a Weeklong Food Festival With 30 Restaurants and Unique Dining Events

Carmel-by-the-Sea will host a culinary week from June 5 to June 13 featuring special events and themed dining experiences.

By Michael Coppetta | Published on April 10, 2026

1 COMMENT Add Us On

Beautiful aerial view of a beach with homes in Carmel, California.
Credit: Ian Philp-Miller/Getty Images

Advertisement

Capital One
Earn unlimited 2X miles on every purchase
VENTURE X

Advertisement



FY 2025-26 Key Accolades

The Best Small Town In California For a 3-Day Weekend, *worldatlas.com*

The Best Christmas Towns in the U.S. in 2025, *hellomagazine.com*

12 Most Walkable Cities that are Simply Stunning to See in the Fall, *House Beautiful*

2026 Sunset Travel Awards - "Where to Go: Coastal Classics," Sunset *Magazine*

10 of the Cutest California Christmas Towns to Visit This Winter, *Secret Los Angeles*

10 Small Towns Across the U.S. You Don't Need a Car to Visit, *Travel + Leisure*

TRAVEL+ LEISURE

10 Small Towns Across the U.S. That You Don't Need a Car to Visit

06 of 10 Carmel-by-the-Sea, California



Credit: Lauren Breedlove/Travel + Leisure

California's Central Coast is world-famous for its scenic drives, but it's just as stunning to explore on foot. The storybook town of Carmel especially prizes walkability, with a one-square-mile downtown that's laced with pedestrian-only lanes. Take a stroll along the beach before tucking in for dinner at the Michelin-starred Chez Noir and a night at L'Auberge Carmel. The Monterey Regional Airport is a 10-minute Uber ride away, making Carmel easy to fly into, but ambitious hikers and cyclists can also access the town via the California Coastal Trail, a statewide network that includes 144 miles of trails in Monterey County.

WorldAtlas CONTINENTS COUNTRIES GEOGRAPHY EDUCATION SOCIAL SCIENCE



The Best Small Town In California For A 3-Day Weekend

Californians could easily spend a lifetime exploring their state and still not see it all. After all, the state is bigger than countries like Japan, Italy, and Germany. As a result, the possibilities for a long weekend getaway are practically endless. Among all of the incredible places to explore in California, Carmel-by-the-Sea stands out as a top contender for a weekend trip. In addition to its beautiful beaches, it offers highlights like an 18th-century mission, 20th-century stone cottages, and a biodiverse nature reserve to explore. Its inns provide the perfect refuge for a weekend of rest, varying from historic to modern and chic. Don't be surprised if you find yourself

Ocean Avenue



View of Ocean Avenue in Carmel-by-the-Sea, California. Editorial credit: Albert Pego / Shutterstock.com

ADVERTISEMENT



Porta Bella Restaurant on Ocean Avenue in the heart of Carmel-by-the-Sea. Editorial credit: TMP - An Instant of Time / Shutterstock.com

For lunch, you have several options as well. Right off Ocean Avenue, on Dolores Street, you'll find The Tuck Box, a local cafe that is housed in a fairytale-like cottage that dates back to 1927. Dishes on the lunch menu include casual items like sandwiches, salads, scones, and homemade pies. For an elegant lunch, consider dining at Porta Bella Restaurant, an Italian establishment that serves a variety of dishes, including risotto, ravioli, and carbonara.

OWNED MEDIA HIGHLIGHTS

From original storytelling to emerging content formats, we continue to find new ways to spotlight Carmel's unique character, lesser-known gems and experiences worth sharing. For engagement, 2024-25 was an outlier year, with rates well above the four-year norm. 2025-26 outperformed both 2022-23 and 2023-24 on Instagram (our priority growth platform) and TikTok. It is also expected that engagement rates will decrease as followers increase.

@visitcarmel

Followers YOY Growth

+17.1%

2025-26 Followers: 93,383
2024-25 Followers: 79,729

Engagement Rate Per Impression YOY

-4.5%

2025-26: 4.2%
2024-25: 4.4%
Industry Average: 0.5%

@visitcarmel

Followers YOY Growth

+17.4%

2025-26 Followers: 128,147
2024-25 Followers: 109,159

Engagement Rate Per View YOY

-10.5%

2025-26: 5.1%
2024-25: 5.7%
Industry Average: 2.2%

@visitcarmel

Followers YOY Growth

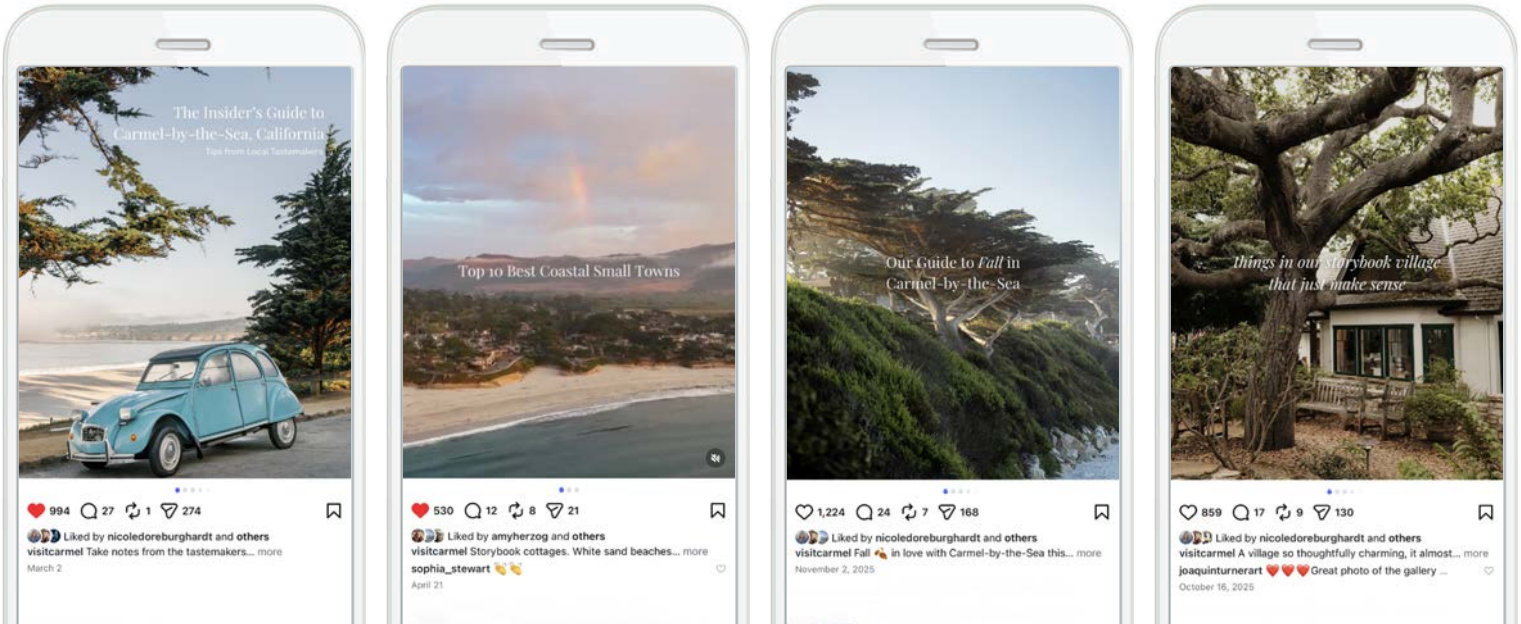
+6.4%

2025-26 Followers: 24,543
2024-25 Followers: 23,068

Engagement Rate YOY

-9.1%

2025-26: 5%
2024-25: 5.5%
Industry Average: 1.7%



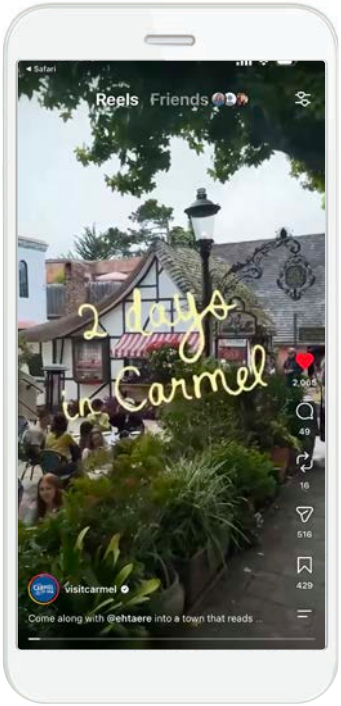
SOCIAL MEDIA POST HIGHLIGHTS & CAMPAIGNS

The below represents top-performing evergreen and campaign posts from 2025-26.



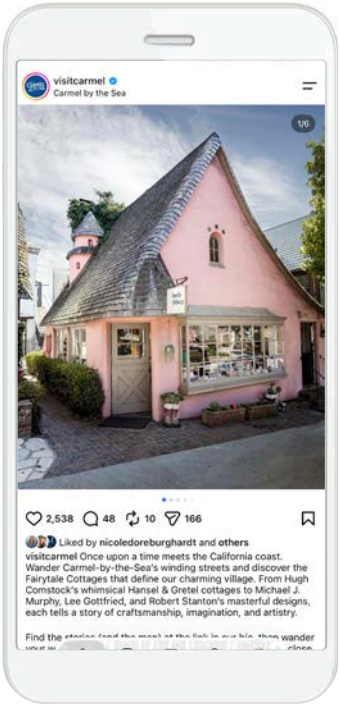
Carmel-by-the-Sea in Bloom

29.4K total engagements



2 Days in Carmel

14.1K total engagements



Fairytale Cottages

9.9K total engagements



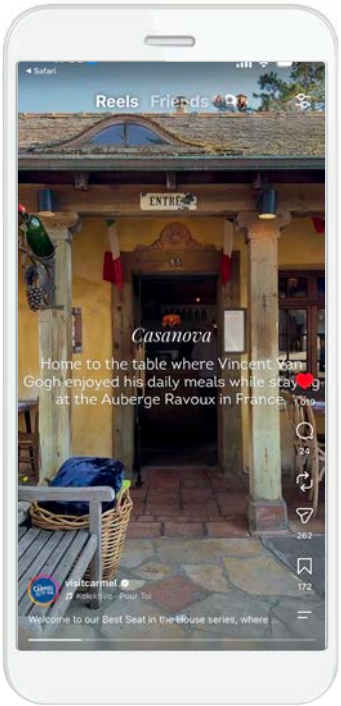
Hog's Breath Inn Reopening

9.1K total engagements



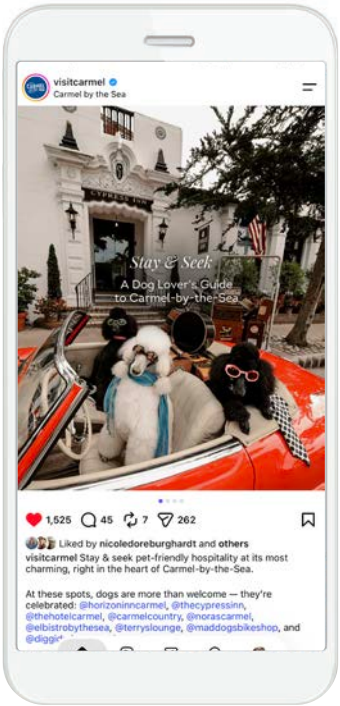
Gateway to Best of Big Sur

5.7K total engagements



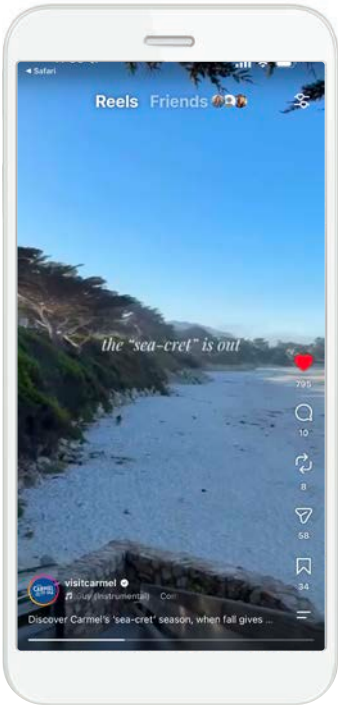
Best Seat in the House: Casanova

4K total engagements



Stay & Seek: Dog Lover's Getaway

1.7K total engagements



Sea-Cret Season

1.9K total engagements

2026-27 EARNED & OWNED MEDIA APPROACH & GOALS

Building upon tremendous strategic growth and media success in 2025-2026, J/PR, the public relations and social media agency for Visit Carmel, remains focused on generating targeted coverage and awareness through impactful storytelling, awards & accolades, strategic hostings, support of signature destination events, compelling creative ideas and thoughtful messaging intended to drive overnight visitation with target audiences during key need periods.

J/PR's prime focus for both its Earned and Owned efforts is elevating the destination to drive high-value travelers to explore Carmel-by-the-Sea while also supporting key audiences who know and love the destination.

J/PR's 2026-27 Key Objectives:

1. Elevate Signature Destination Events Through Earned Media Efforts
2. Continue Penetrating New Media Outlets with a Focus on Substack and Emerging Media
3. Create New Storytelling Opportunities That Align Carmel with Relevant Trends
4. Spotlight the People & Partners Behind Carmel's Unique Charm
5. Elevate Brand Authority via AI Search (Through Cohesive, Message-Rich Storytelling)

J/PR's earned media efforts will be evaluated using both qualitative and quantitative analysis, intended to evaluate the contribution of strategic communication by its outcome and impact. Quantitative metrics for measurement will include:

- Total media impressions
- Share of Voice
- Total number of media and influencer hostings
- Total number of earned media placements
- Barcelona Principles Score
- AI visibility

2026-27 SOCIAL POSITIONING STRATEGY

This is effortless coastal luxury in its most charming form.

We remain focused on this central storytelling priority. In 2026/27, we are honing in on encouraging longer overnight stays and off-season getaways, sharing consistent destination stewardship messaging, ensuring balanced visibility across our partners, and expanding awareness amongst cities with new flight routes.

Carmel is not a "destination dupe" for anywhere else in the US. It is singularly unique, and we will lean into what this town does best: timeless charm. Be it a historic inn or the shiny new hotel on the block, a 1970s-founded eatery or a two MICHELIN star restaurant, we have something for everyone with great taste.

We'll continue to inspire awe, whimsy and relaxation through authentic lifestyle imagery and video that immerse viewers in the experience. J/PR's social media efforts will be evaluated from both qualitative and quantitative perspectives, with a focus on engaging current followers and expanding reach to new audiences, while spotlighting partner content and elevating storytelling for the destination.



FY 2025-26 RESULTS & METRICS: WEBSITE, ADVERTISING, SOCIAL & BROCHURE

	FY 2023-24	FY 2024-25	FY 2025-26	% Change YOY
CarmelCalifornia.com				
New Users	1,053,868	1,631,619	1,669,546	+2.3%
Sessions	1,434,492	2,291,242	2,259,291	-1.4%
Book Direct Referrals	215,369	227,115	196,078	-14%
Opt-In Emails	86,277	88,595	92,346	+4.2%
Digital Advertising				
Paid Digital Impressions	73,845,356	123,326,633	76,132,140	-38%
Paid Digital Clicks	585,045	1,536,156	1,669,494	+8.7%
Average CTR	0.79%	1.25%	2.19%	+75%
Connected TV Advertising				
TV Commercials Aired	762,135	10,633,484	5,002,976	-53%
Verified Visits	2,737	188,661	136,616	-28%
Verified Visit Rate	1.64%	15.73%	10.41%	-34%
Social Media				
Instagram Followers	95,297	109,159	128,147	+17.4%
Facebook Followers	73,335	79,729	93,383	+17%
YouTube Video Views	1,398,137	1,532,937	2,356,122	+54%
TikTok Followers	20,320	23,068	24,543	+6.4%
Brochure Requests				
City Guide Fulfillment	2,163	1,638	2,853	+74%

COMMUNITY RELATIONS & PARTNERSHIPS









PROVIDE MARKETING SUPPORT FOR COMMUNITY EVENTS

In addition to producing signature events, Visit Carmel provides marketing and promotional support for numerous local events and performances to help boost attendance and offer visitors with more to experience. These events are executed by the Carmel Chamber of Commerce, City of Carmel, Carmel Art Festival, Carmel Art Walk, Car Week event producers, Carmel Bach Festival, Monterey Symphony, Sunset Cultural Center, Pac Rep Theater, Outdoor Forest Theater and more.











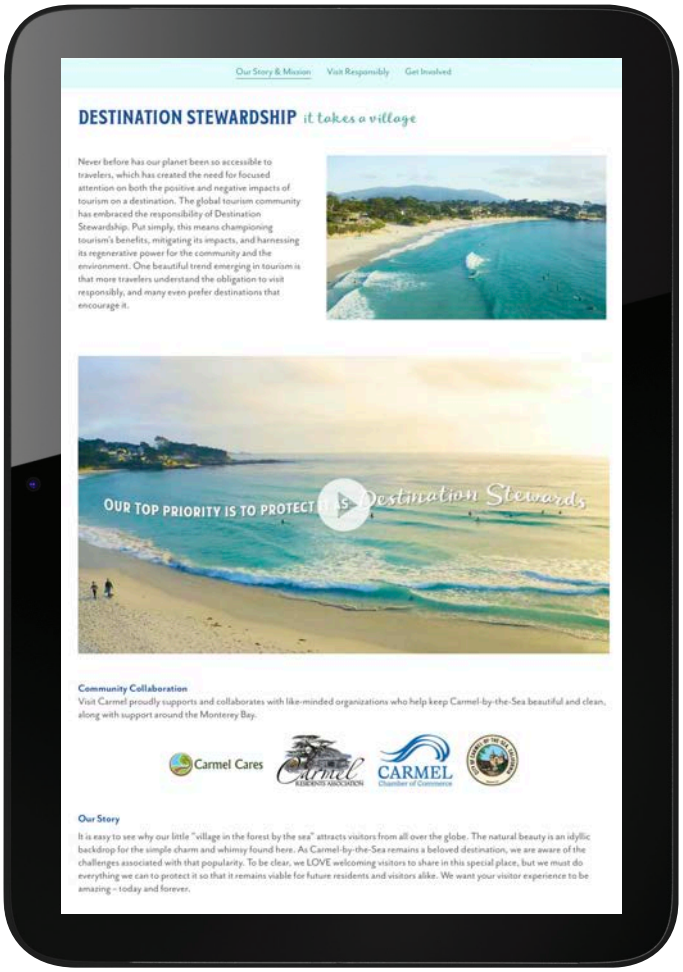




DESTINATION STEWARDSHIP

Our destination stewardship initiative is committed to promoting safe, responsible, and respectful travel, which safeguards the vital components of our community for a vibrant future. To generate awareness and support, a comprehensive website provides all the details, how to get involved, and highlights the amazing work done by community organizations, specifically Carmel Cares, Carmel Residents Association, Carmel Chamber of Commerce, and the City of Carmel-by-the-Sea.





EXPERIENCE MANAGEMENT PLAN

Visit Carmel is taking a broader view of our role in the community through the development of an Experience Management Plan. An initial task force made up of members from the Carmel Residents Association, the Carmel Chamber of Commerce and Visit Carmel, are working under the guidance of See Monterey and outside consultants to identify opportunities to manage Carmel tourism while safeguarding the community's unique character, economic vitality, resident quality of life, and visitor experience. The objective is to work collaboratively with residents, businesses, city leadership, and community partners to identify ways in which we can work together to thoughtfully manage tourism into the future.

