



Driving Economic Development

Reporting Period
July 1, 2025 - December 31, 2025





Established in 1995, Monterey County Business Council operates a number of programs designed to support and elevate the local business community.

These programs collectively enhance the economic vitality of Monterey County, making it a thriving environment for businesses to succeed and grow.

- Monterey Bay APEX Accelerator
- Leadership Monterey County
- Monarch SBDC Affiliate
- South Salinas Valley Broadband Authority
- and more!



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During the reporting period of July 1, 2025 through December 31, 2025, Monterey County Business Council's work remained aligned with and guided by the four core goals established in the County of Monterey's Development Set-Aside (DSA) Guidelines.

MCBC advanced targeted initiatives to support economic development, strengthen workforce development, expand strategic marketing and outreach, and deepen collaborations and partnerships across the region.

These efforts collectively contributed to building a more resilient, inclusive, and competitive local economy.

- **Economic Development**
- **Workforce Development**
- **Marketing and Outreach**
- **Collaborations and Partnerships**



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MONTEREY COUNTY
BUSINESS
COUNCIL

Regional Economic Development

MCBC advances regional economic growth by leading data-driven analyses that inform policy, investment, and community development across Monterey County.

Through the support of the County of Monterey, regional municipalities, and MCBC partners, these tools are made available at no cost to local businesses and organizations.

View the reports via the below links.

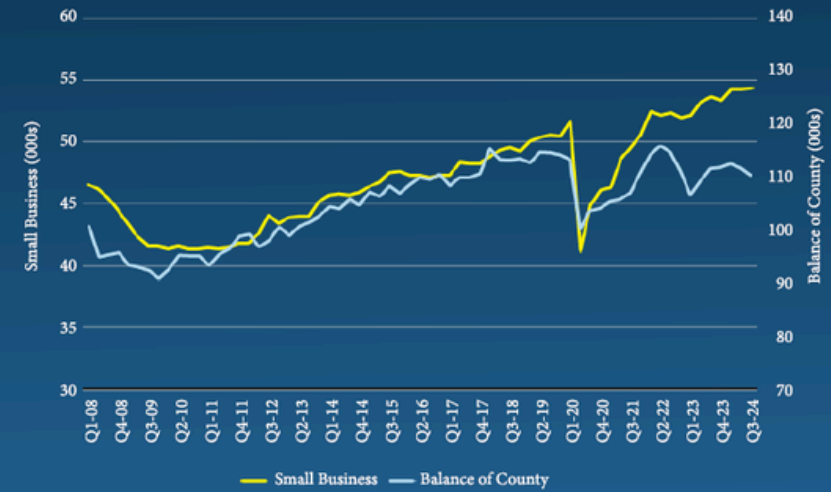
[Monterey County Economic Trends and Small Business Report](#)

[South County Retail Market Assessment](#)

[Economic Impacts of Defense Spending in Monterey County](#)

SMALL BUSINESS GRAPHICS

Private Employment
Monterey County



Source: California Employment Development Department. Analysis by Beacon Economics.



Small Business Employment by Industry Monterey County

Industry	Q3-24 Emp.	Small Business 1-Year Chg. (%)	Balance of County 1-Year Chg. (%)
Other Services	3,808	-0.7	1.2
Prof, Sci, Tech, and Mgmt	3,275	4.1	-6.0
Transport/Warehouse/Util	1,948	3.7	-0.1
Financial Activities	2,018	2.0	-1.0
Health Care	9,780	5.8	6.7
Information	370	-5.4	-0.6
Leisure and Hospitality	10,810	1.0	0.1
Manufacturing	1,850	-7.3	-7.3
Admin Support	2,565	-1.2	-3.3
Education	688	9.0	-13.3
Wholesale Trade	1,856	3.5	-4.5
Retail Trade	4,810	-3.2	1.9

Monterey County Economic Trends and Small Business Report



Narratives, Economic Realities, and the State of Small Business in Monterey County



LEADERSHIP
MONTEREY COUNTY

Our Results

July 1, 2025 - December 31, 2025

Our Leadership Monterey County program continues to thrive, bringing together a dynamic cohort of emerging leaders committed to making a meaningful impact across our region. Throughout the program, participants engage deeply with the critical issues shaping Monterey County—from education and agriculture to economic development and community resilience.

We are proud of the continued contributions of both our alumni and current cohort. Through meaningful connections and ongoing collaboration, our network of leaders is driving positive change and strengthening communities across the region.

Building Leaders Through a Program Focused on the County's Issues & Economic Drivers



Nonprofit Day



Military & Defense Day



Hospitality Day

32

Class
Size

65

Guest
Speakers

35

Site
Visits



Our Results

July 1, 2025 - December 31, 2025

During the first half of the fiscal year, Monterey Bay APEX Accelerator served 252 businesses across Monterey County, helping small businesses navigate and succeed in the government contracting space.

Despite the recent federal government shutdown, our procurement counselors remained actively engaged—continuing to support clients and proactively preparing them to pursue future contracting opportunities.

Helping Businesses Bid & Win Government Contracts



Monterey Bay APEX Accelerator Staff at the Fresno SBA Office

64

Federal Contracts Won by Monterey County APEX Clients

\$70,677,602

Value of Federal Contracts Won by Monterey County APEX Clients

252

APEX Clients Served in Monterey County

Client Demographics

- 57** Women-Owned
- 66** Hispanic-Owned
- 54** Veteran-Owned
- 34** Service-Disabled Veteran-Owned
- 12** 8(a) or DBE
- 34** HUB Zone

1,120

Jobs Created/Maintained in Monterey County

Please note that the data reported only reflects federal contracts. Any state or local government contract awards are not reflected in the numbers.



MONARCH
Small Business Development Center
HOSTED BY UNIVERSITY OF CALIFORNIA MERCED

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Our Results

July 1, 2025 - December 31, 2025

304

Monterey County
Businesses Served

454

Monterey County
Advising Hours

40 Spanish-Speaking
Businesses

163 Woman-Owned
Businesses



We Provide FREE:

- Business Advising in Multiple Languages
- Workshops and Trainings
- Marketing Assistance
- Other Helpful Resources to Small Businesses and Entrepreneurs

Outreach Center Locations:

- Mondays in **Monterey** 10 AM - 5 PM
- Wednesdays in **Soledad** 9 AM - 4 PM
- Weekdays in **Salinas** 9 AM - 4PM



Inaugural El Mercadito



2025 SBDC Day Business Expo



Serreza Beauty Grand Opening



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Supporting Childcare Entrepreneurs

Through a partnership between the Central CA SBDC Network and Nurture, this free, bilingual 12-week program is expanding access to quality childcare across Monterey County.

Designed to support aspiring providers in obtaining licenses for small, home-based childcare businesses, participants also received a \$1,000 startup grant—helping them successfully launch and sustain their businesses while strengthening our workforce and communities.

Growing Childcare Options for Monterey County Families



160

Monterey County Participants

113

Spanish Speaking Participants

47

English Speaking Participants

62

New Licensed, Operating Home Childcare Providers

372-496

Monterey County Childcare Slots Created

Small Home-Based Childcare Licensees care for 6 children on average (62 licensees x 6 children = 372 childcare slots). On the higher-end, these licensees can care for up to 8 children depending on the age and needs configuration (62 licensees x 8 children = 496 childcare slots).



Veloz Cafe, SBDC Client



Zelia's Mediterranean Y Más, SBDC Client



Lavender Creek Co., SBDC Client

Thank You Supervisors



✉ info@mcbc.biz

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☎ (831) 216-3000

🌐 linktr.ee/MontereyCountyBusiness





MONTEREY

FIND YOUR WAY HERE®

SEE MONTEREY STRATEGIC UPDATE

Monterey County Board of Supervisors
May 12, 2026



Updates

Staffing Update



Dawn Mathes-Park

Vice President of Marketing &
Community Relations



Colleen Courtney

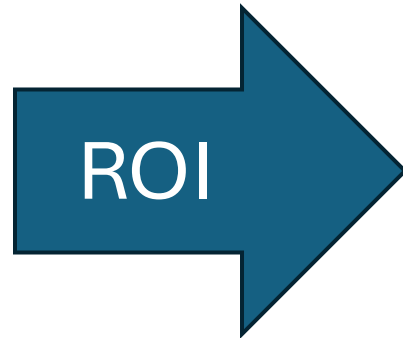
Community Relations Director

***“If Sales and Marketing are the bricks DMO’s build with,
strategic Community Relations is the mortar.”***

COUNTY OF MONTEREY TOURISM INVESTMENT Q3 REPORT (FY 2025-26)

Leveraging the County of Monterey investment of **\$956,747** with the combined jurisdiction and hotel investments yielded a tremendous ROI for our entire community. See Monterey's marketing communications efforts contributed to reaching over **20 million travel-ready households** and **more than 1 million ad-influenced intended trips** to Monterey County.

\$ 956,747
Investment



- **25 Group Meetings Business**
Generated for the County of Monterey
- **3,060 Booked Room Nights**
- **\$2.8M Economic Impact**
Generated for the County of Monterey
- **42,414 website referrals to 153 businesses**
- **\$10.5M Earned Media** Equivalency
- **2.5B** Earned media impressions
- **155.8k social media engagements**
(likes, clicks, shares)

Wine Country PROMOTIONS



Located off HWY 101 in Chualar, promoting Salinas Valley wineries



CHICAGO FLIGHT LAUNCH

- **New Service - United: Chicago (ORD)** launching May (166 seats)
- Paid media campaign running in Chicago (March – June)
- 18 mtgs with writers, editors, producers and influencers in Chicago market
- Media FAM tied to inaugural flight on May 23

See Monterey CA Verified
Sponsored ·

Looking for an easy getaway? Nonstop flights on United Airlines from Chicago to Monterey County are now available!

NEW DIRECT FLIGHTS FROM CHICAGO.

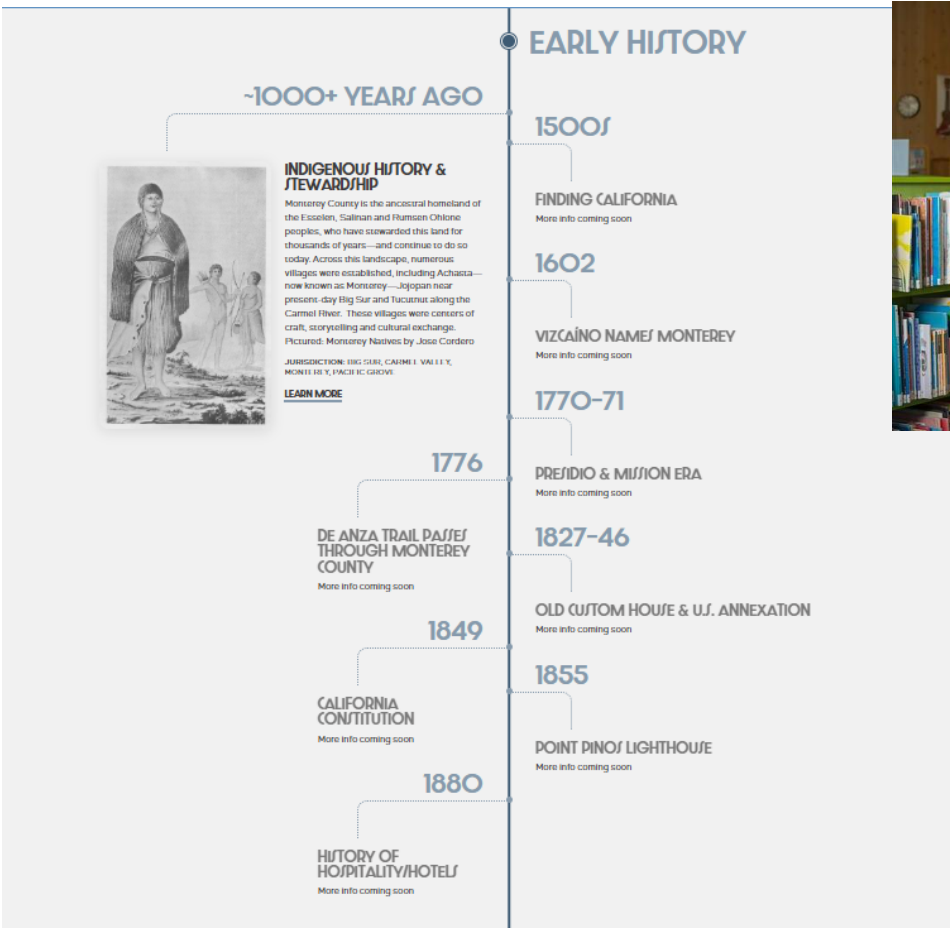
Schedules subject to change.

Direct flights: (ORD) to (MRJ). [LEARN MORE](#)
Find your way here.

439 100 Comments 28 Shares

Like Comment Share

MONTEREY 1000



**Brian
Edwards
Library &
Museums
Director for
Monterey**

**Indigenous History
Linda Yamane
(Rumsen Ohlone artist &
cultural practitioner)**



MONTEREY 1000



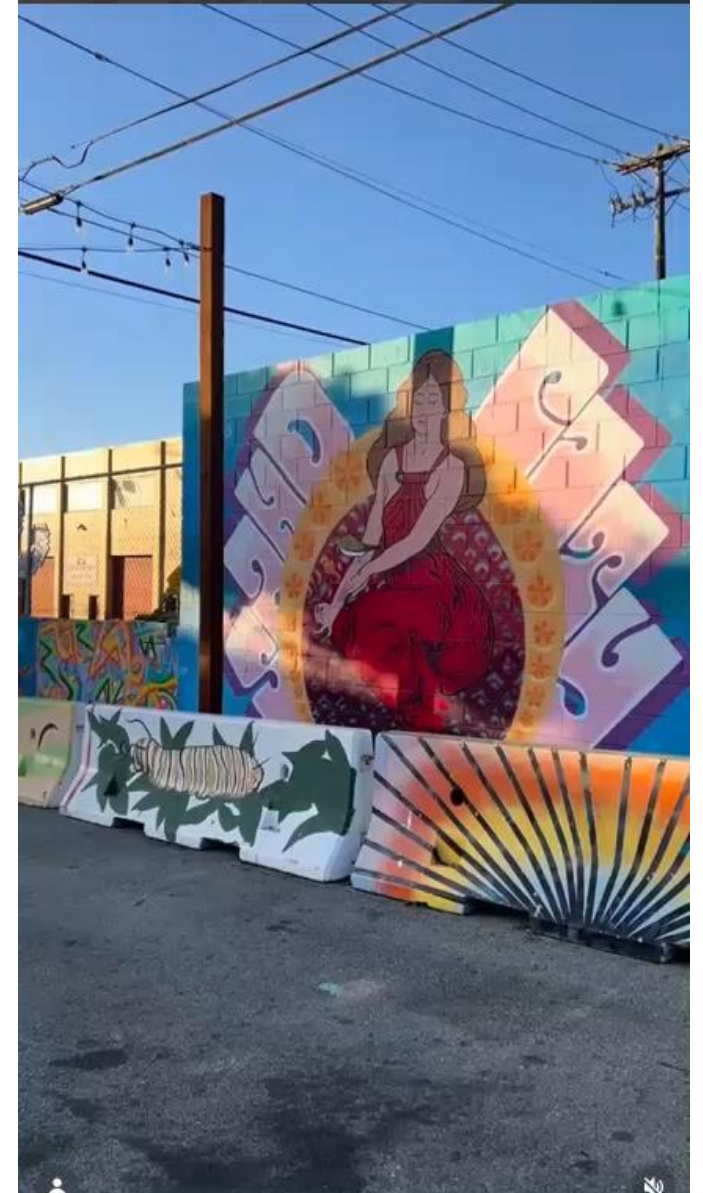
Monterey County Firsts
Sam Farr
(Ret. Congressman)

OFF THE CANVAS: ARTS & CULTURE



"Monterey County is a living canvas – our murals, galleries and stages reflect the people and stories that call this place home."

– Jacquie Atchison, Executive Director, [Arts Council for Monterey County](#)



COUNTY OF MONTEREY

COMMUNITY RELATIONS & LOCAL BUSINESS SUPPORT

- Thanks to the County's investment, **businesses in Monterey County** receive free membership and marketing support from See Monterey
 - **1,200+** hospitality business members across Monterey County
- 2 Member Familiarization (FAM) trips held
- Recent **new** members: Cowgirl Winery, MIRTH, A Taste of Elegance Fine Catering & Events, Quench Bar Catering, The Bagel Bakery, Thai Village, and Healing Home
- Car Week information hub for visitors and residents
- **800 Monterey County events** promoted by See Monterey
- Collaboration with regional chambers and key groups (MCHA, MCBC, MCVGA, MCFB, MBEP, CSUMB)
- Representation on See Monterey's Board: Supervisor Daniels, Jacquie Atchison-MCAC, Norm Groot-MCFB, Paula Joy-MacNab-MCFC, Michelle Overmeyer- MST, Mel Harder-WeatherTech, Donna Langley- Pebble Beach, Hartmut Ott-Carmel Valley

BUSINESS TRAVEL PROMOTION: MEETINGS & CONFERENCES

“Travelers for Conferences are 158% the spend of Leisure visitors”

~Tourism Economics

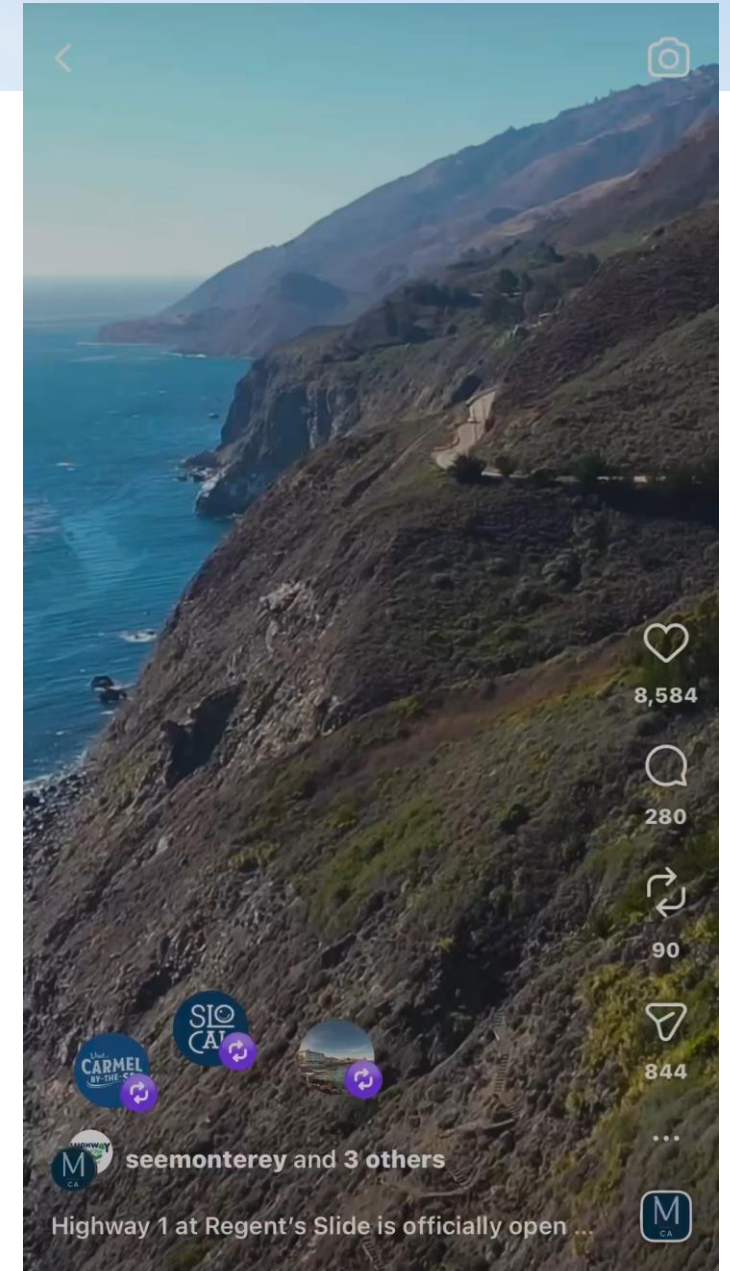
Travelers attending meetings and conferences are among the highest-value visitors in terms of destination spending.

- Promoted the jurisdiction at 75+ industry events across the nation
- Presented 15 Co-Op Opportunities in 2025 for County Partners.
- In-Market Events and FAMS: HB Conclave, Maritz, Pebble Beach Food & Wine, Northstar Leadership Forum
- Mega-Exposure at Major Industry Events:
 - IMEX America - 15,500 (attendees)
 - American Society of Association Executives Conference - 5,500
 - Professional Convention Management Association (PCMA) Convening Leaders - 4,500
 - Meeting Professionals at MPIWEC – 2,200

HIGHWAY 1 – NOW OPEN!

HWY1 – California's FIFA Road Trip

- Major global push celebrating full reopening of HWY 1
- Leveraging FIFA spotlight to position HWY 1 as the best route between SF and LA matches
- Re-establishing HWY 1 as a must-do on international itineraries
- Coordinating with Caltrans and the Governor's Office on a high-impact reopening moment (May 2026)
- Doubling down on Responsible Travel messaging – renewed collaboration with Big Sur Byways Organization
- Early momentum: strong demand returning, with coastal hotels and restaurants filling fast





COMMUNITY COMMUNICATIONS: Car Week

1. Early Alignment & Partner Coordination

- Car Week Organizer Kick Off (June)
- Ongoing Collaboration with Event Organizers

2. Centralized Trip Planning Experience

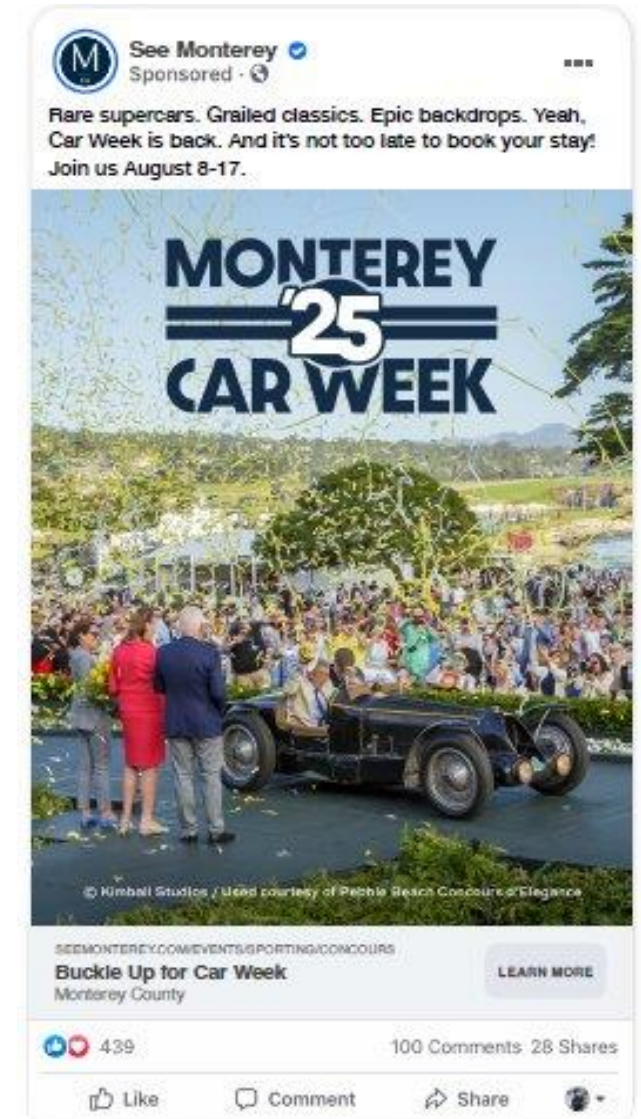
- Car Week Content Hub (SeeMonterey.com/CarWeek)
- Interactive event map

3. Targeted Paid & Social Promotion

- Paid campaign targeting car enthusiasts in key markets
- Always-on social promotion beginning in May

4. Media and Amplification

- Media Roundtable (July)
- Event planners to share highlights with regional media



2025 TOURISM ECONOMY GROWTH

DEAN RUNYAN

ANNUAL TOURISM IMPACTS REPORT

We're Back! Sort of...

- Direct travel spending increased 4.1% to **\$3.3B**
- Direct travel-generated employment grew by **400 jobs** (+1.5%)
- Direct travel-generated earnings increased to **\$1.9 B** (+7.5%)
- Travel spending increased to **\$346M** (+6.1%)

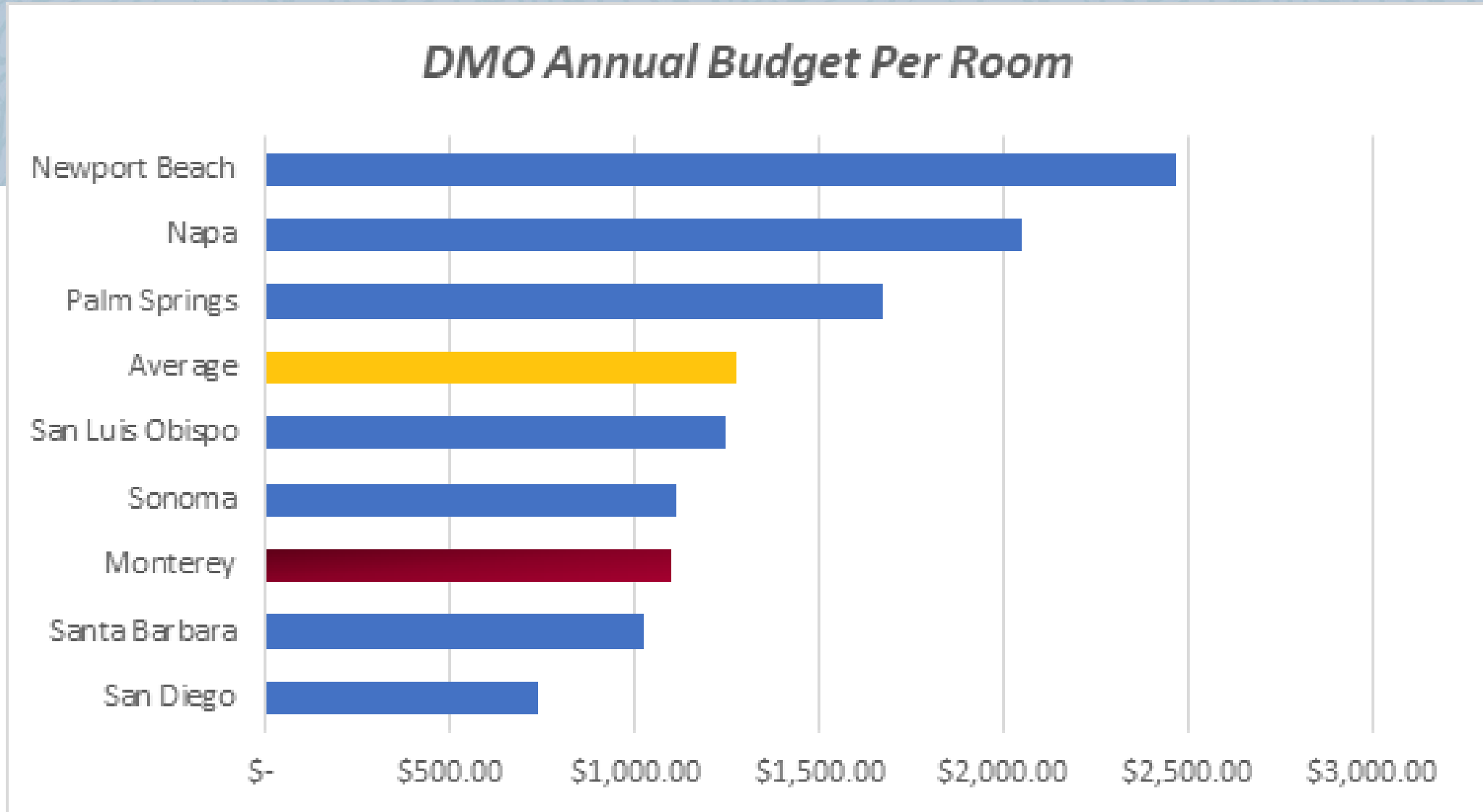




What's Next

DMO annual budgets

Competitive analysis



Tourism economics

2026-2027 Forecast

2026

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

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%

Punching above our weight!

Travel Outlook

Good

Strong alignment with demand: travelers seeking inspiration, outdoor experiences, and diverse, authentic destinations

Bad

Group/business travel growth flattening, with longer booking windows and increased competition

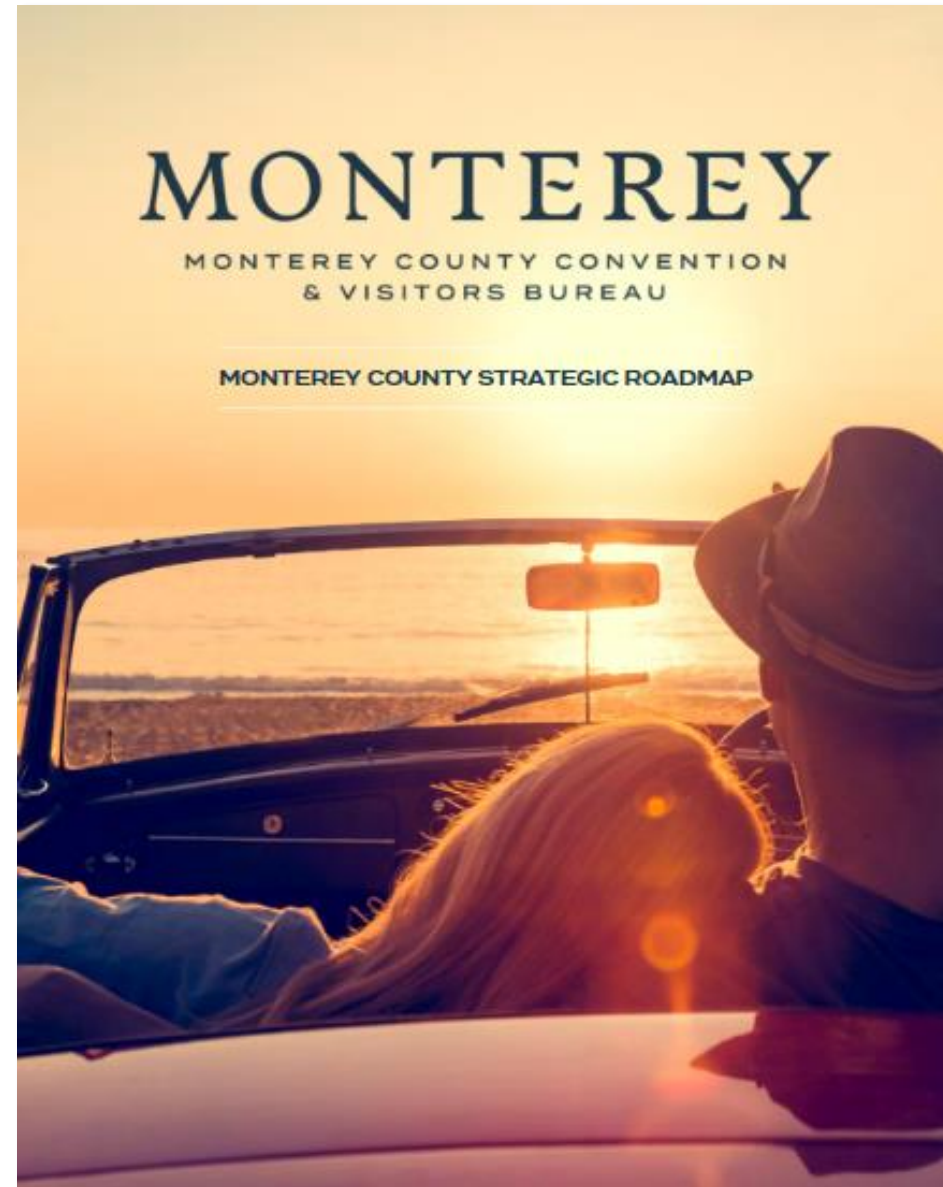
Ugly

Heightened uncertainty: declining international visitation, stronger global competition, reduced Brand USA funding, and dollar volatility impacting inbound demand



General parameters, FY 26-27

- Guided by longer term strategic roadmap MCT 2030
- Based on steady MCTID and Jurisdiction Investment partners
- Key Areas of Focus for Managed Growth
 - Market Growth – *1,000 new rooms & One More Night*
 - Upgraded Investment in Responsible Travel Program
 - Reinvigorating Monterey Wine Country
 - Visitor Dispersion – Monterey 1000, Art Tourism
 - Event Development – Soccer/Sports, Laguna Seca, Entertainment, Seasonal
 - Air Service Growth
 - Luxury & International Visitation





Next Five Years

PLANNING FOR LONG TERM SUCCESS

Monterey County's tourism economy depends on long-term strategy, stable investment, and strong community partnerships.

Our greatest opportunity: the ability to shape what comes next.



**UNLOCK
HIGH-VALUE
NEW MARKETS**



**OWN THE
CENTRAL COAST
SPORTS STAGE**



**EXPAND AND
OPTIMIZE
AIR SERVICE**



**TURN EVENTS
INTO ECONOMIC
ENGINES**



**FULLY LEVERAGE
CAR WEEK**



**REDISTRIBUTE
DEMAND
COUNTYWIDE**
UNLOCK SOUTH COUNTY'S
FULL POTENTIAL



**SET A NEW INDUSTRY
STANDARD FOR
RESPONSIBLE TRAVEL**



**TOURISM
MASTER PLAN**

Thank You for
your continued partnership.

