



Visit **CARMEL** BY-THE-SEA

SEE MONTEREY

Resident Sentiment on Tourism Study

Preliminary Results

Research Framework

Methodology

- Data collection includes:
 - **An open community survey** distributed via city channels, social media, newsletters, and stakeholder networks
 - E-mails to registered voters went out Oct. 8
- The survey remains open through October 23, 2026.
- The report includes 262 responses

Sample Characteristics

Local Stakeholders

155 local residents, including 104 live/work residents and 60 local business owners.



Resident Profiles

132 respondents were full-time residents, averaging 19 years in the community

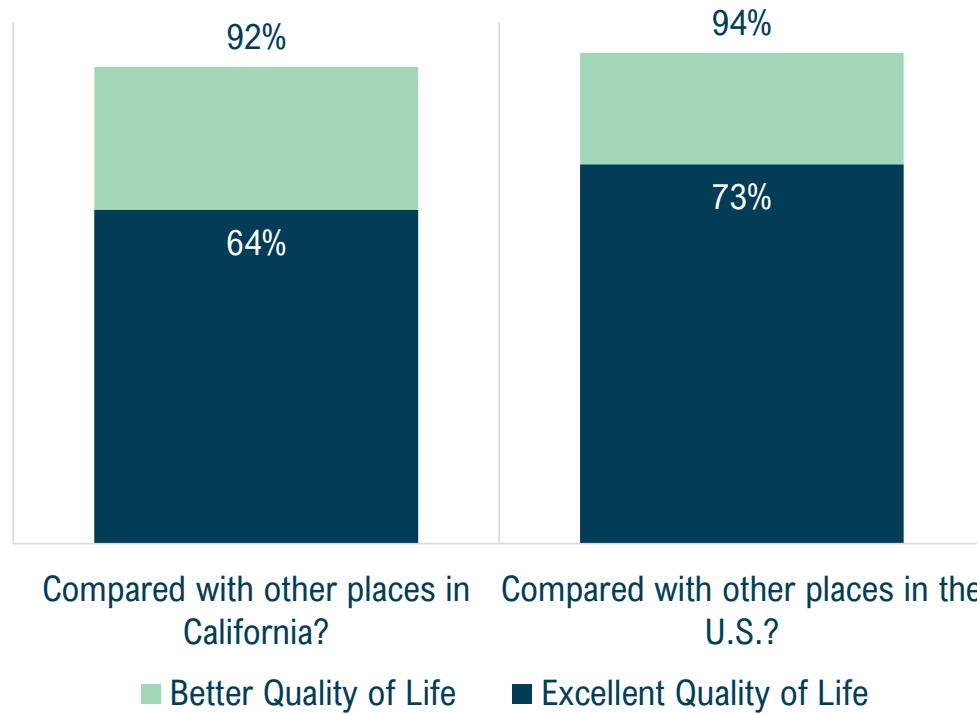


Baseline Perceptions

Quality of Life Ratings

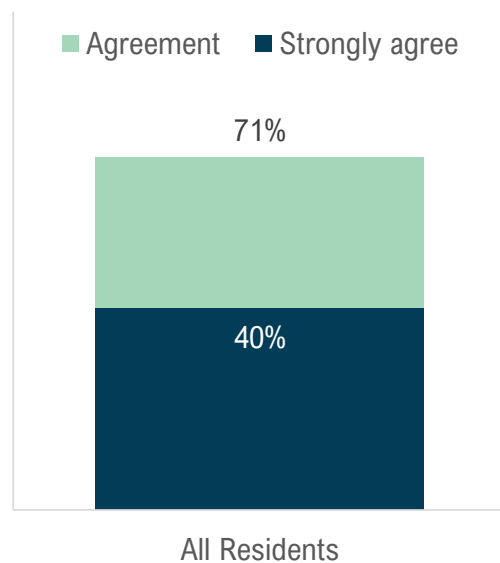
Quality of Life Ratings

Carmel Residents Only | Overall



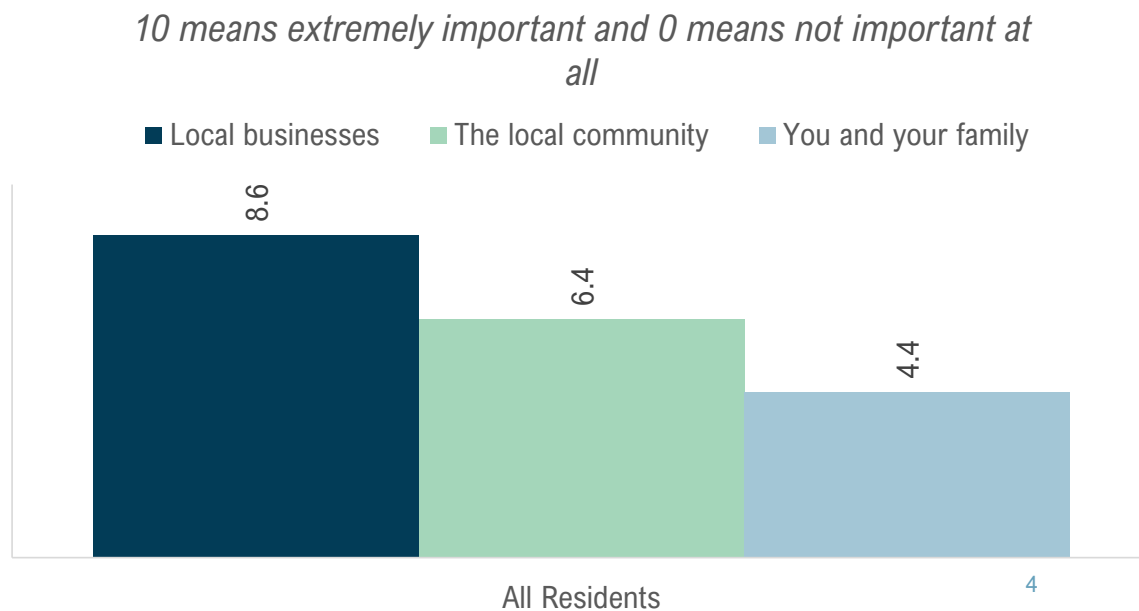
Positive Perceptions and Benefits

Most residents agree tourism benefits the community.



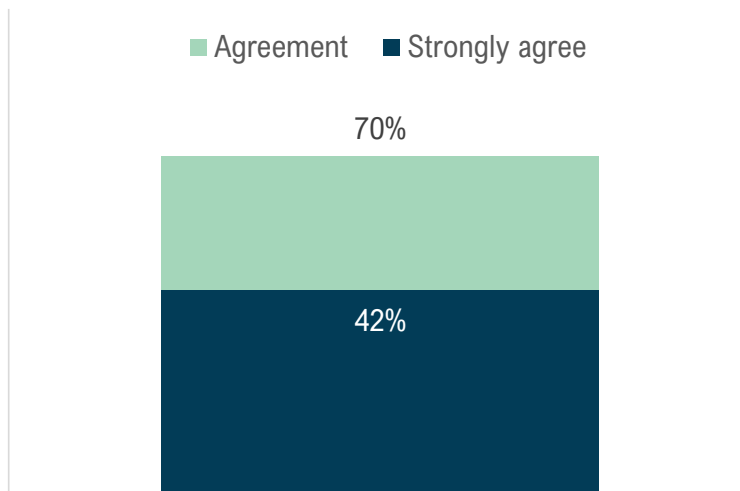
SMARinsights

Resident strongly agree that tourism is important for local businesses.



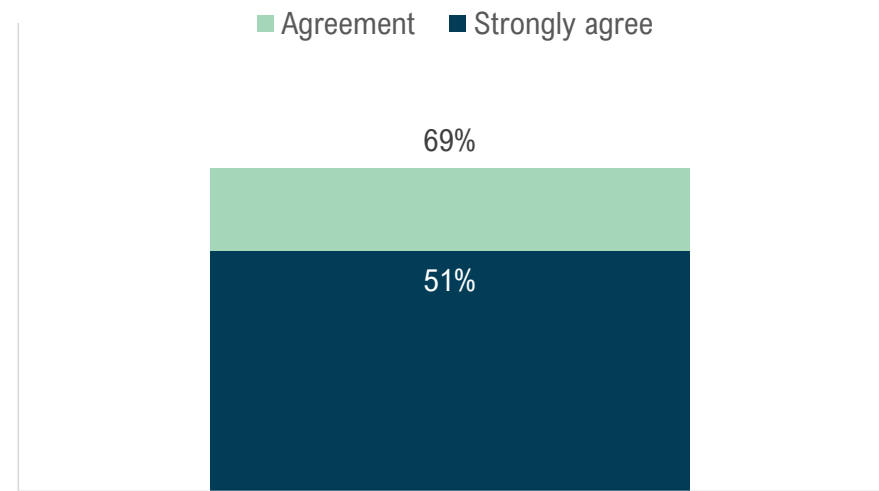
Positive Perceptions and Benefits

Tourism creates jobs for people in the area



All Residents

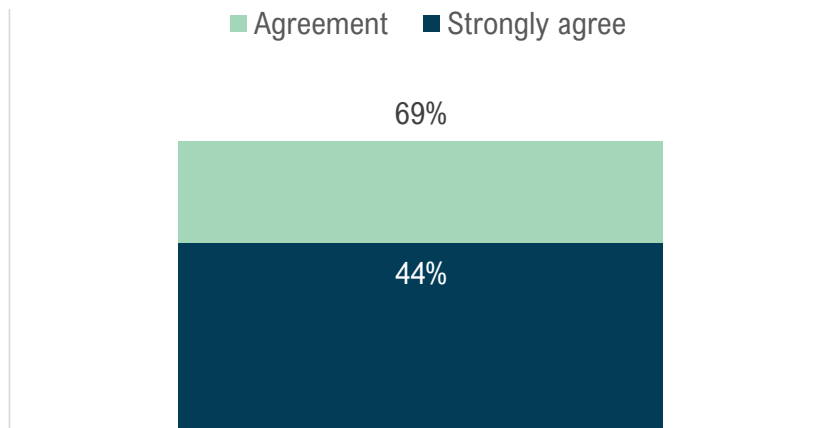
Tourism generates tax revenue that helps pay for services the community needs



All Residents

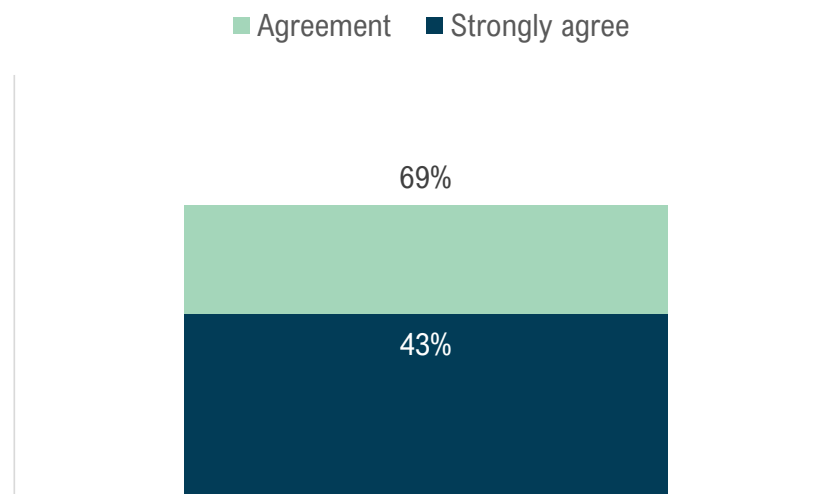
Positive Perceptions and Benefits

Tourism drives visitor spending in the community, which is important to the economy



All Residents

Tourism supports restaurants and shops that local residents can also enjoy

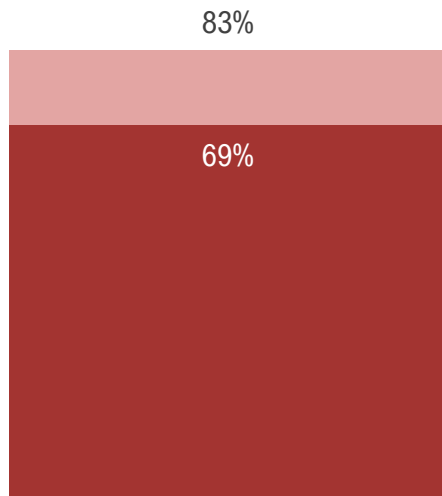


All Residents

Negative Perceptions

Tourism creates too much traffic

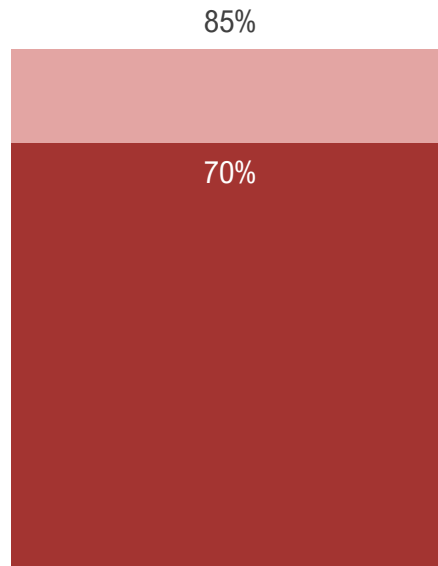
Agreement Strongly agree



All Residents

Tourism creates crowding

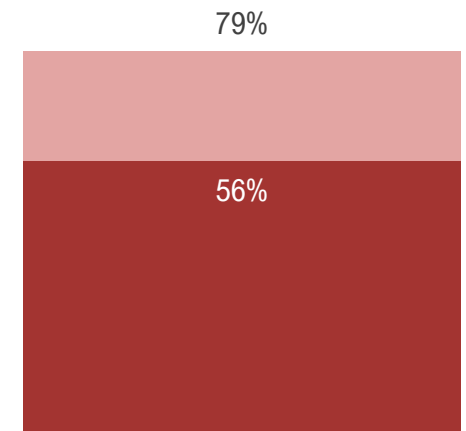
Agreement Strongly agree



All Residents

Tourism creates stress on the natural environment

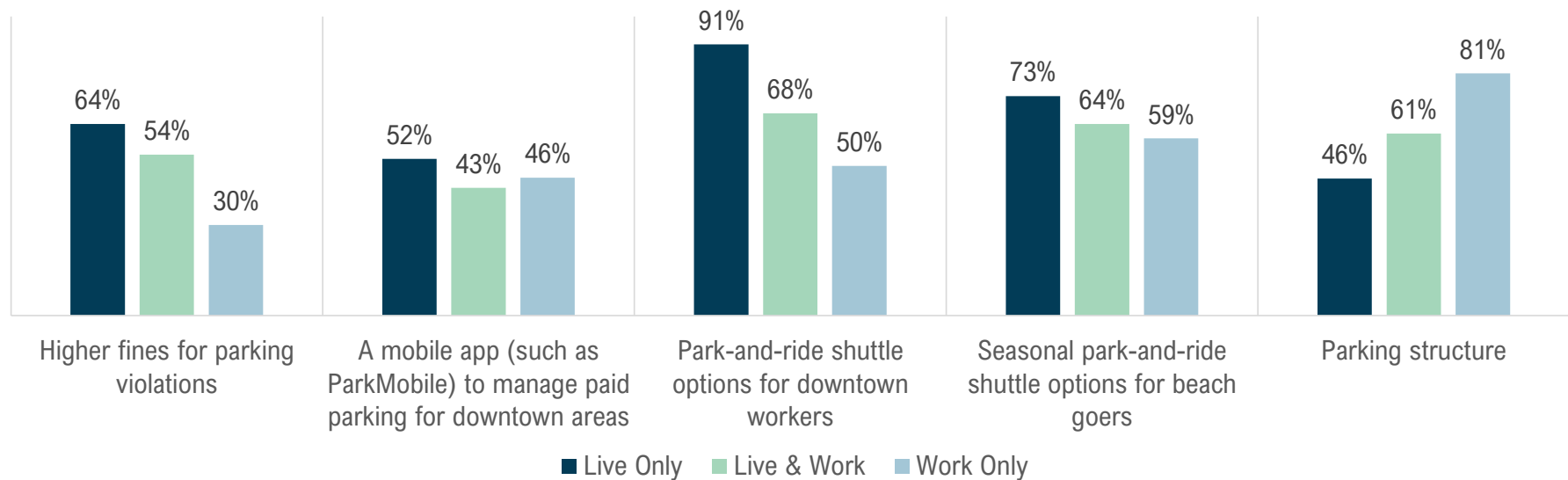
Agreement Strongly agree



All Residents

Parking Solutions

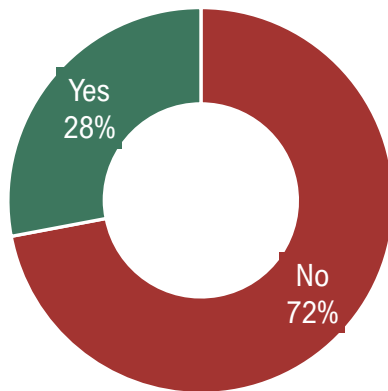
Parking Solution Favorability



Tourism Drives Local Business Revenue

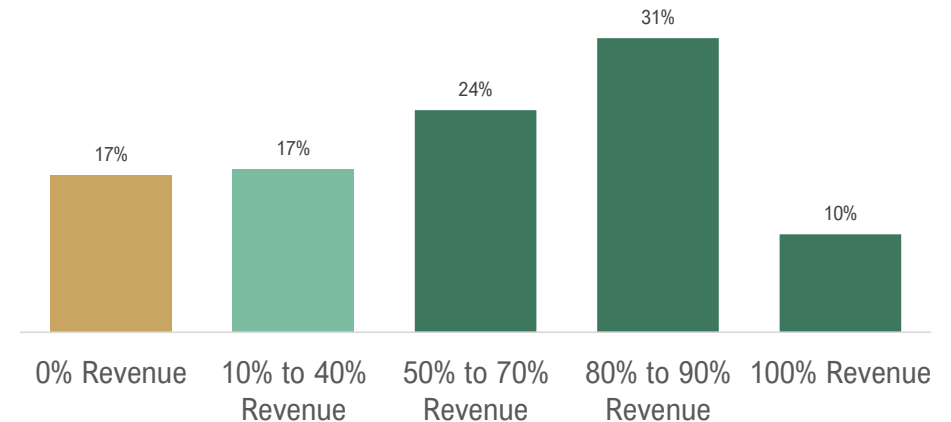
Local Businesses Rely on Tourism

Would your local businesses be able to survive **ONLY** on the revenue currently generated by area residents?



Tourism Drives Revenue for Local Businesses

Revenue Share Generated by Tourism

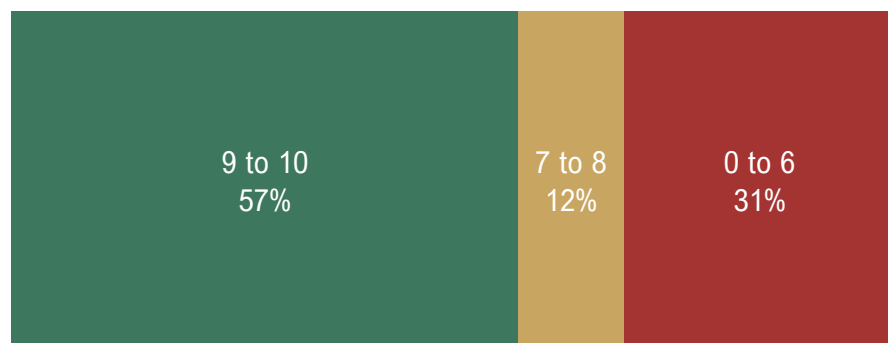


Tourism Means Business

Tourism is Critical to Local Businesses

Importance of Tourism to Local Businesses

Scale of 0 (Not important at all) to 10 (Extremely important)



Businesses Would Close If Tourism Slowed

If all tourism to Carmel-by-the-Sea stopped or slowed significantly, what impact would that have on your local businesses?



Working Residents Depend on Tourism

Livelihoods threatened if tourism stopped or slowed significantly

Carmel Residents Working Locally Only

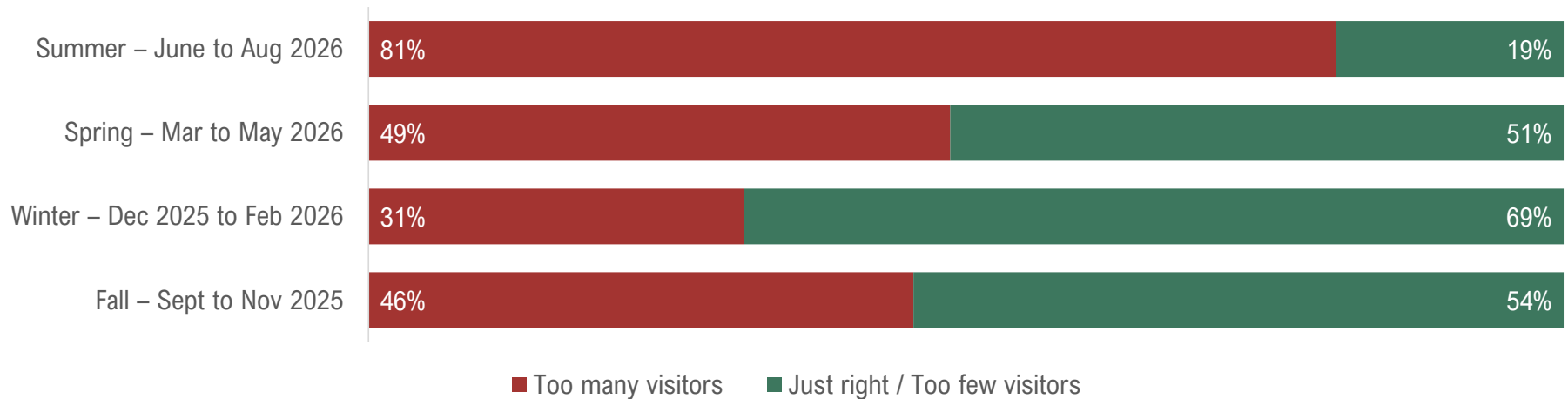


Seasonal Resident Sentiment

Concerns about too many visitors is focused on summer

Did Carmel-by-the-Sea attract too many or too few visitors during these periods?

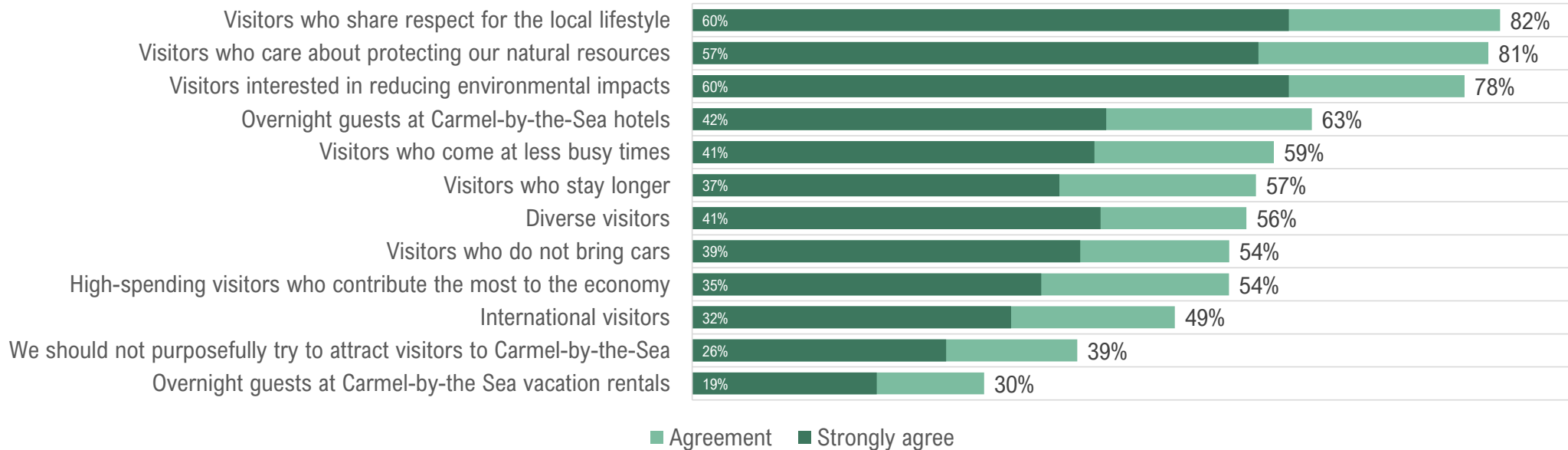
Carmel-by-the-Sea Residents Only



The Visitors that Residents Prefer

Prioritize attracting visitors who *share respect for lifestyle and environment.*

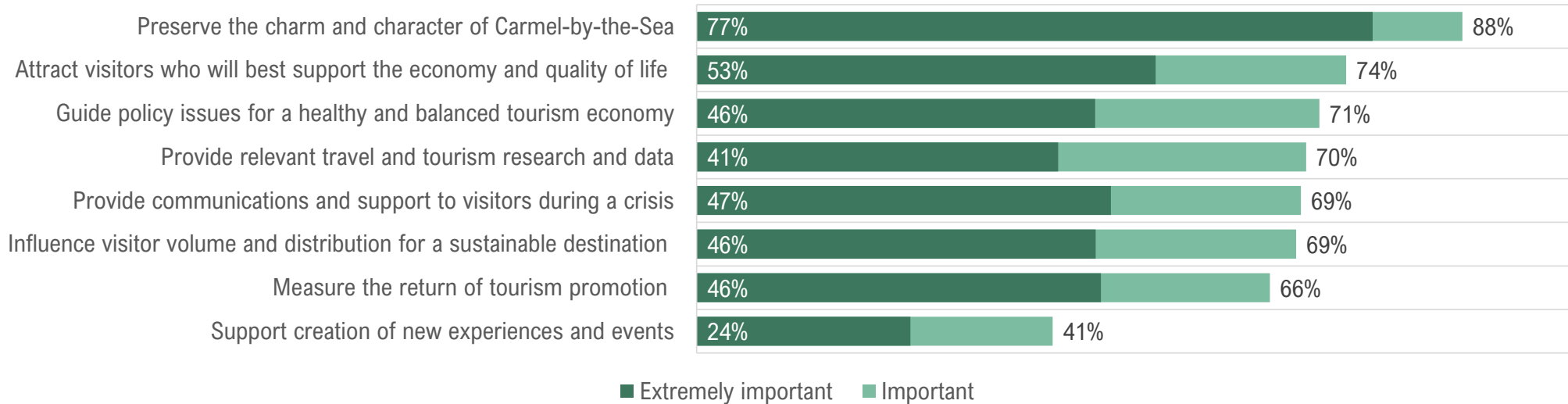
Carmel Residents Only



What Residents Want

Top mandate is to *preserve the charm and character of Carmel-by-the-Sea*

Carmel Residents Only



Key Findings

Carmel-by-the-Sea residents understand that tourism is extremely important for local businesses—a point that is only further reinforced by the findings in the full report.

72% of local businesses would not be able to survive only on the revenue generated by residents of Carmel-by-the-Sea, across all industries—not just traditional hospitality businesses.

Overall, Carmel-by-the-Sea residents know that visitor spending is an economic driver, but differences exist based on age, length of residency and work status.