

THE STATE OF PLAY

HUNTINGTON BEACH TOURISM SUMMIT

PRESENTED BY  VISIT
HUNTINGTON BEACH
SURF CITY USA®

Hyatt Regency Huntington Beach Resort & Spa

THE STATE OF PLAY

THURSDAY MAY 8, 2025
2PM – 5:30PM

An aerial photograph of Huntington Beach, California, featuring the iconic pier extending into the blue ocean. The sandy beach is populated with people, and several volleyball courts are visible in the foreground. Palm trees line the boardwalk area. The entire image is framed by a decorative border with a repeating pattern of geometric and floral motifs in white and blue.

WELCOME TO THE 2025 HUNTINGTON BEACH TOURISM SUMMIT

Kelly Miller

President & CEO,
Visit Huntington Beach



THANK YOU TO OUR SPEAKERS

- **Caroline Beteta** – President & CEO, Visit California
- **Cindy Decker** – Vice President, Americas, Tourism Economics
- **Tommy Martinez** – Senior Client Partner, Destinations, TripAdvisor
- **Coach Karch Kiraly** – U.S. Men's National Volleyball Team



THANK YOU TO OUR SPONSORS



THANK YOU TO OUR VISIT HUNTINGTON BEACH BOARD



EXECUTIVE COMMITTEE

- Justin Simpson
- Paulette Fischer
- Paul Maddison
- Janis Mantini
- Jon Benson
- Jennifer Williams
- Todd Szilagyi
- Sheik Sattaur

BOARD OF DIRECTORS

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- Meg Bernardo
- Christopher DeGuzman
- Vipe Desai
- Duke Dufresne
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- Kristi McKnight
- Brian Smith
- Dean Torrence
- Peter "PT" Townend
- Marisa Unvert
- John Villa



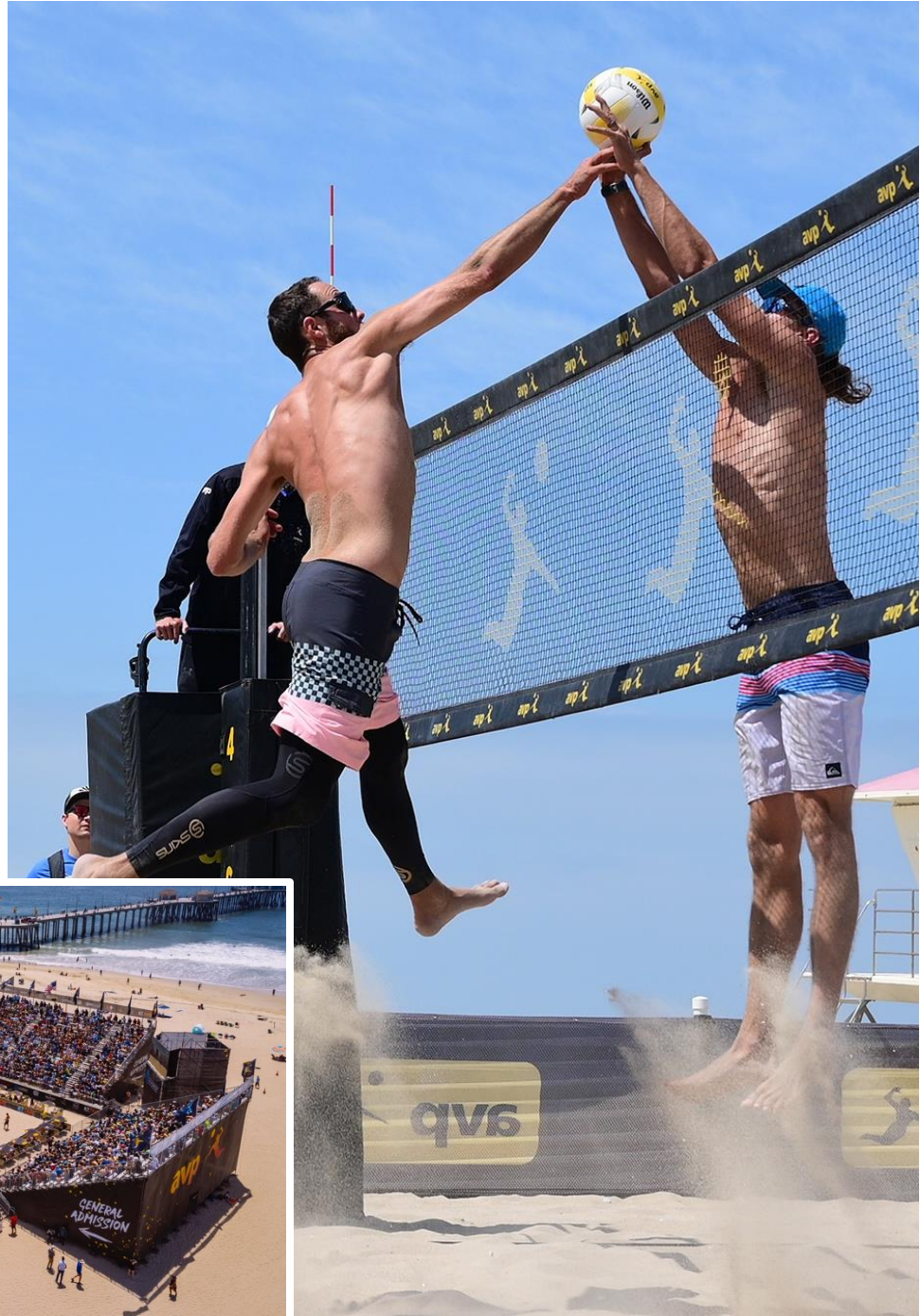
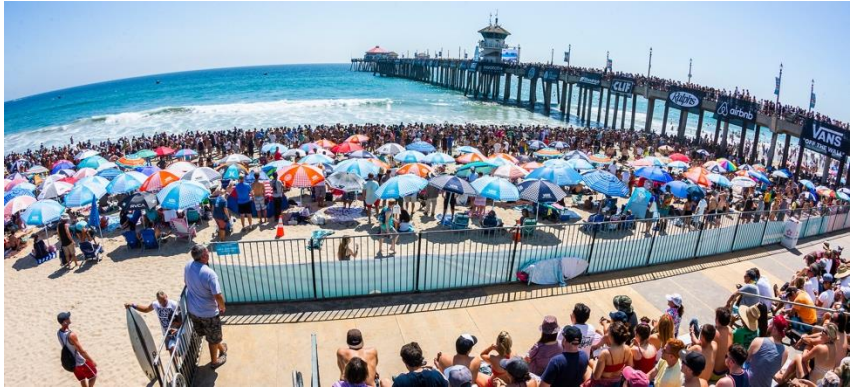
THANK YOU TO OUR ELECTED OFFICIALS





HUNTINGTON BEACH CURRENT STATE OF PLAY





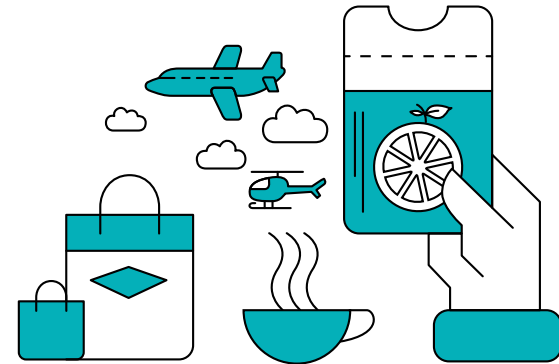
An aerial photograph of a coastal city at sunset. The scene captures a wide beach on the left, a multi-lane highway with traffic in the center, and a row of modern buildings on the right. A long pier extends into the ocean in the distance. The entire image is framed by a decorative border with Art Deco-style patterns, including geometric shapes, floral motifs, and a heart. The text "DESTINATION JOURNEY" is centered over the image in a large, white, bold, sans-serif font.

DESTINATION JOURNEY

DESTINATION JOURNEY

Success in the destination brand space doesn't happen overnight.

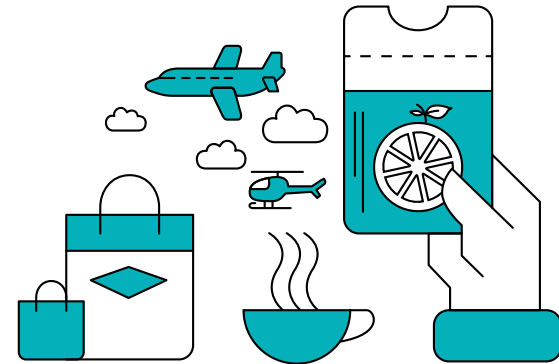
- VHB Brand Refresh
- VHB Website Relaunch
- HB Collection Launch



DESTINATION JOURNEY

COVID Pandemic

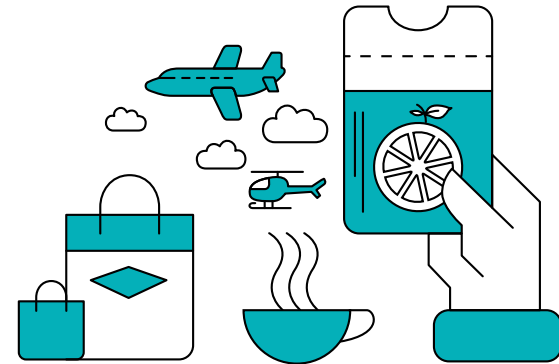
- Research & Insights



DESTINATION JOURNEY

COVID Pandemic

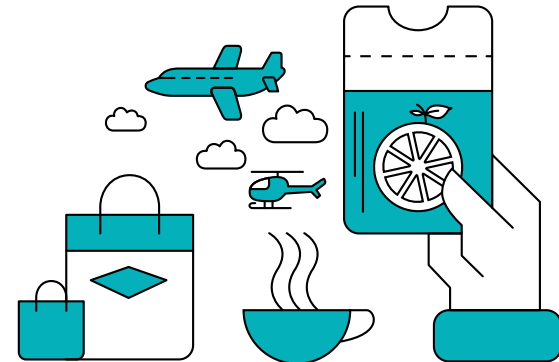
- Research & Insights
- Reinforced the **Surf City USA®** Brand



DESTINATION JOURNEY

COVID Pandemic

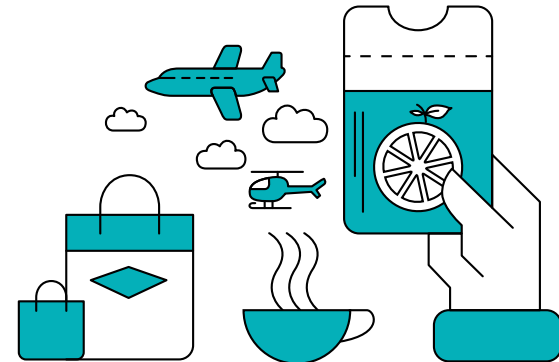
- Research & Insights
- Reinforced the **Surf City USA®** Brand
- Targeted “Block & Tackle” Marketing Campaigns



DESTINATION JOURNEY

COVID Pandemic

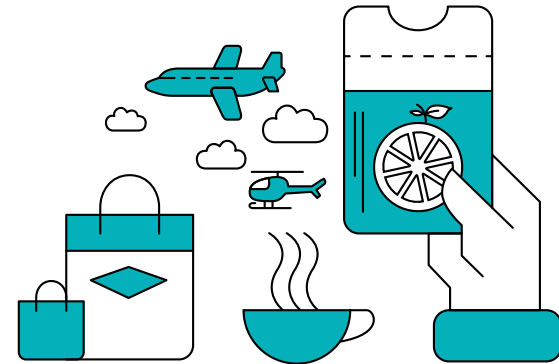
- Research & Insights
- Reinforced the **Surf City USA®** Brand
- Targeted “Block & Tackle” Marketing Campaigns
- Increased Familiarization Tours



DESTINATION JOURNEY

COVID Pandemic

- Research & Insights
- Reinforced the **Surf City USA®** Brand
- Targeted “Block & Tackle” Marketing Campaigns
- Increased Familiarization Tours
- Special Events





2023-2026 STRATEGIC PLAN

VISION • OUT	VISION • IN	MISSION	VALUES	REPUTATION	POSITION
<p>A welcoming, beach-infused community that inspires the stoke of optimism in every visitor and resident.</p>	<p>VHB is an effective destination leader representing the combined visitor industry and community partnership in the brand development, marketing and sales of the Surf City USA® experience.</p>	<p>Visit Huntington Beach supports and advocates for the economic vitality and quality of life for our Huntington Beach community through inspirational destination marketing and brand management.</p>	<p>VHB embodies a community-focused spirit of service that is proactive and strategic.</p>	<p>The Huntington Beach experience is:</p> <ul style="list-style-type: none">• Inspirational• Authentic• Friendly• Fun	<p>Huntington Beach rises above its competitive set destinations, offering unique value to visitors seeking:</p> <ul style="list-style-type: none">• Beach and Beyond Experience• Beachfront Hotels• Downtown Experience• Accessibility
IMPERATIVES	INITIATIVES				
Drive Global Brand Awareness	<ul style="list-style-type: none">• Issue RFP for creative agency of record• Leverage the World Cup and LA28 to expand global destination brand awareness• Secure year-round signature sporting and city-wide events• Efficiently leverage brand partnerships to increase Huntington Beach's global brand awareness				
Enhance the Destination Experience	<ul style="list-style-type: none">• Enhance partnership with the City, Downtown BID and other entities to enhance the Beach & Beyond experience• Develop outreach and education to enhance customer service for all visitors, including international and accessible communities• Facilitate the creation of new bookable product• Improve connectivity throughout Huntington Beach				
Champion the Value of Tourism	<ul style="list-style-type: none">• Utilize VHB Board to act as tourism ambassadors• Cultivate our advocacy relationship with the City• Articulate the quality-of-life enhancements tourism brings to Huntington Beach residents• Develop and implement partner and resident sentiment outreach and evaluation program				
Prioritize Organizational Effectiveness and Culture	<ul style="list-style-type: none">• TBID modification approved• Develop stakeholder engagement plan (Board, City, DBID, Ambassadors and Chamber)• Improve and maintain overall processes based on culture survey results• Develop and deploy customer satisfaction survey				





TBID MODIFICATION

The background of the image is a photograph of the Huntington Beach Pier, a long wooden structure extending from a sandy beach into the ocean. The pier has several buildings and a lifeguard stand. The beach is wide and sandy, with some palm trees visible in the foreground. The sky is clear and blue. The entire image is framed by a decorative border with a repeating Art Deco pattern. The pattern includes geometric shapes like circles, triangles, and rectangles, as well as stylized floral and wave motifs. The text "2025 HUNTINGTON BEACH TOURISM SUMMIT" is overlaid in the center in a bold, white, sans-serif font.


2025 HUNTINGTON BEACH TOURISM SUMMIT




THE HOUSE OF SURF CITY USA®



2024 ECONOMIC IMPACT HIGHLIGHTS

2.34  MILLION
NON-OC RESIDENT VISITORS

4.40% 
INCREASE OVER THE LAST YEAR

36%
WERE FIRST-TIMERS

64%
WERE REPEAT VISITORS

2024 ECONOMIC IMPACT HIGHLIGHTS

THEY CAME FROM...

LOS ANGELES,
PHOENIX, VEGAS,
DENVER, NEW YORK

AND THEY
DIRECTLY SPENT...

\$580 MILLION

71% OF THAT WAS SPENT
AT LOCAL BUSINESSES



2024 ECONOMIC IMPACT HIGHLIGHTS

21

MILLION IN LOCAL TAX
REVENUES GENERATED
BY TOURISM IN HB

5,604

JOBS SUSTAINED DIRECTLY
BY TOURISM IN HB

TOURISM IS NOW THE 6TH LARGEST EMPLOYMENT SECTOR IN OUR CITY.

A photograph of two women standing on a wooden pier or boardwalk. The woman on the left is wearing a light purple long-sleeved shirt and black pants, and is using binoculars to look at the distance. The woman on the right is wearing a white sleeveless top, a black baseball cap, and black pants, and is pointing her right arm towards the horizon. They are both smiling. The background shows a body of water, a marshy area with green vegetation, and a distant shoreline with some buildings and palm trees under a blue sky with scattered clouds. The image is framed by a decorative border with various geometric and organic patterns in white and light blue.

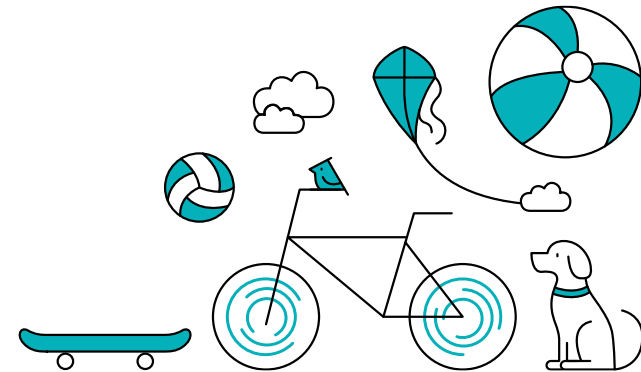
HUNTINGTON BEACH'S FUTURE STATE OF PLAY





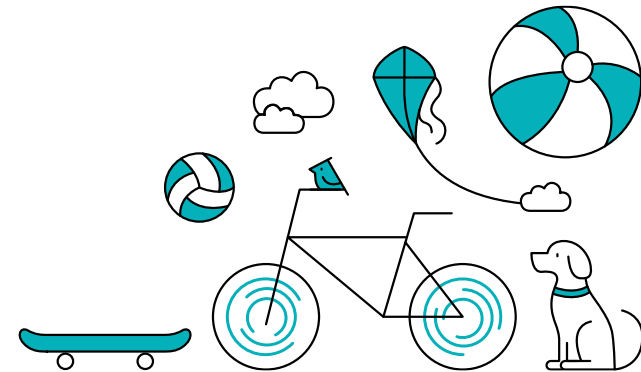
HUNTINGTON BEACH'S FUTURE STATE OF PLAY

- Dedicated TBID resources through 2028



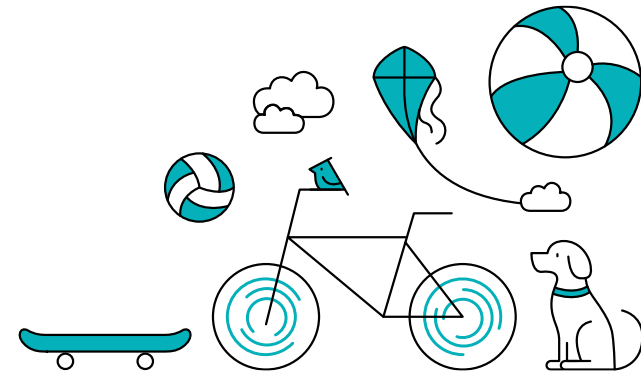
HUNTINGTON BEACH'S FUTURE STATE OF PLAY

- Dedicated TBID resources through 2028
- A bold new strategic plan in 2026



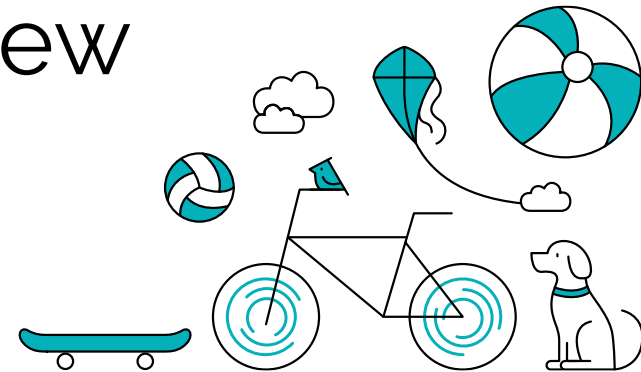
HUNTINGTON BEACH'S FUTURE STATE OF PLAY

- Dedicated TBID resources through 2028
- A bold new strategic plan in 2026
- Pre-LA28 collaborations with HB and OC partners as we prepare to welcome the world



HUNTINGTON BEACH'S FUTURE STATE OF PLAY

- Dedicated TBID resources through 2028
- A bold new strategic plan in 2026
- Pre-LA28 collaborations with HB and OC partners as we prepare to welcome the world
- New collaborations with existing and new special events during shoulder season



HUNTINGTON BEACH

CALIFORNIA

UNPLUG AND UNWIND
AT OUR TOP SPAS

2025 SURF CITY USA®
FOODIE AWARD WINNERS

DISCOVER THE
INTERNATIONAL
SURFING MUSEUM

FIND YOUR
PERFECT BEACH

MEET THE FOUNDER
OF CORGI BEACH DAY



HUNTINGTON BEACH'S FUTURE STATE OF PLAY

Family Fun in Huntington Beach

You'll find plenty of fun for every member of the family in Surf City USA®. After checking in to one of our world-class oceanfront resorts, drop your bags and head out on a fun-filled family day in Huntington Beach!



WHERE TO STAY

- **Hyatt Regency Huntington Beach Resort & Spa**
 - Three outdoor pool areas
 - Children's water playground
 - Complimentary beach amenities
 - A full slate of recreation activities from June through Labor Day, including Mermaid Magic, Cosmic Slides, Dive-In Movies, and more
- **The Waterfront Beach Resort, a Hilton Hotel**
 - Two outdoor pool areas
 - Waterslides
 - Bicycle, surrey, boogie board, and beach gear rentals
- **Paséa Hotel & Spa**
 - Ninth Island Pool
 - Beach toy rentals
- **Kimpton Shorebreak Resort**
 - Giant chess and jenga games in the outdoor courtyard
 - 40-foot climbing wall for ages 12+ in the fitness center
 - Nightly Fireside S'mores
 - Complimentary boogie boards, sand toys, and more

SURF LESSONS IN SURF CITY USA®

- **Surf Lessons** - Get the quintessential Surf City USA® experience by taking a **surf lesson** while in Huntington Beach.
 - There are numerous accredited surf schools to choose from all along the 10 miles of coastline, and they welcome surfers of all skill levels and all ages.
 - **Corky Carroll's Surf School:** (714) 969-3959
 - **OC Surf Coaching:** (714) 745-8492
 - **Clint Carroll Surf School:** (949) 355-7285
 - *Local tip: Surf lessons are better in the morning. Don't worry, wetsuits and boards are provided for you!*

1

SURFCITYUSA.COM

Planning the Perfect Day Trip to Huntington Beach

By Joshua Noble on Jun. 12, 2024

Sitting between the bustling cities of Los Angeles, San Diego, and the Inland Empire, Huntington Beach offers amazing scenic and coastal views, making it a fantastic spot for a short "day-cation." Whether you're a family, a couple, or a group of friends, there's something for everyone to enjoy. Let's dive into our recommendations for your perfect day trip to Surf City USA!

- [Arrival and Parking](#)
- [Enjoying the Beach](#)
- [Lunchtime](#)
- [Enjoying the Rest of Your Day](#)
- [Experiencing the Perfect HB Sunset](#)
- [Need Dinner Before Heading Home?](#)

Arrival and Parking [Back to Top of List](#)



To make the most of the sunshine, plan to arrive before noon. **Parking** is widely available, from beachfront spaces to enclosed garages. Our favorite spots are near Downtown and the **HB Pier**, ensuring you don't have to walk far to start your adventure.

Enjoying the Beach [Back to Top of List](#)

"It's what I call the Times Square of surfing retail"

Discover California's home of surfing through the eyes of an Aussie ex-pro surfer turned International Surfing Museum executive director



Huntington beach pier and beach, Southern California, and, above, the Sugar Shack Cafe on Main St.

You'll want to stay at ... one of the hotels overlooking the awesome beach and ocean. The Hyatt Regency Huntington Beach Resort and Spa, Paséa Hotel & Spa, The Waterfront Beach Resort, or Kimpton Shorebreak are all great choices. Out of the four, the Kimpton is a boutique hotel located in the heart of downtown that overlooks the pier. Or, if you're looking for a budget-friendly option, there are plenty of other hotel properties located up Beach Boulevard.

The best time to visit is ... midwinter, to enjoy the mild weather and still spend time outdoors, and surf in the winter months. Summers are great too but can get more crowded.

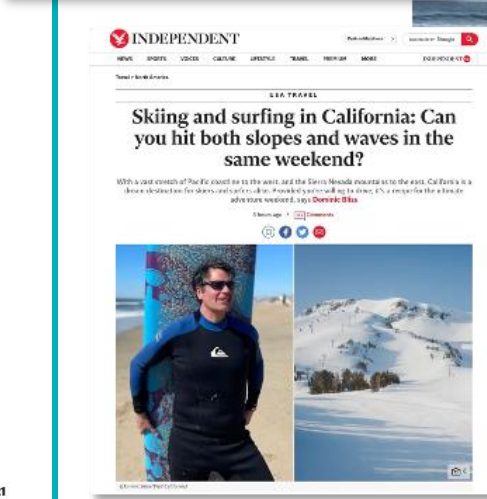
A tour you should do ... is the Historical Downtown Walking Tour offered by Visit Huntington Beach. You'll walk through Surf City USA's downtown and learn about landmarks. The tour ends with a beer at The Longboard Restaurant & Pub on Main St.

Don't miss ... Huntington Beach International Surfing Museum. The current exhibit on display is Duke's Dream Came True: Surfing's Road to the Olympics, which has 18 artists' original work, along with 16 panels showcasing the history of Duke Kahanamoku and his dream of expanding the sport of surfing.

The locals are very ... welcoming to out-of-towners. We have a couple of big international events annually for the World Surf League and the International Surfing Association, so we are used to welcoming athletes and fans from all over the world.

You should pack ... boardshorts and bikinis for the beach because the sun shines all year long. If you need to buy some, our local surf shops have a fantastic selection from classic brands.

WORDS: JENNIFER ENNON



Day in the life
Of a California girl



PETER TOWNEND - HUNTINGTON BEACH MUSEUM EXECUTIVE DIRECTOR

My favourite destination in America is ... Huntington Beach because it truly is Surf City USA®. The iconic Huntington Beach Pier and consistent waves make it a former professional surfer's dream.

The best thing about Huntington Beach is ... it's a beautiful, laid-back beach city with a longstanding surf culture, and it reminds me of my original hometown of Coolangatta, Queensland.

I've lived here for ... over 45 years. I married a girl from Huntington Beach, and there was also a business opportunity here for me that I couldn't pass up as I wrapped up my professional surfing career.

The most unique thing about Huntington is ... the pier and 16km of beach, the most of any city in California. The beaches are wide and you can hire a bicycle and ride 9km from the pier to Newport Beach Pier.

If you visit, surf at ... Huntington Beach Pier if you're an experienced surfer with a high level of ability. For a less crowded spot, there are plenty of good waves to the north or south of the pier, and sometimes you can find a

peak to yourself. If you need to rent a board, you have what I call "the Times Square of surfing retail" – two giant surf shops, Huntington Surf & Sport and Jack's Surfboards, at the entrance to the pier.

If you're with kids visit ... one of the many kid-friendly surf schools located along the beaches. They can join group lessons or have a private lesson, and wetsuits and boards are included.

After a surf, I head to ... The Sugar Shack Cafe on Main St, owned by a local surfing family. I always order the egg dishes and pancakes.

For a beer, go to ... Duke's at the foot of the pier because it has the best ocean views. My other favourite local hangout is G's Boat House, it's like the Cheers bar of Huntington Beach.

The suburb is perfect ... for everyone because you can make it your own. Whether you are a surfer or just want to spend time relaxing by the beach, you can have a great time here.

HUNTINGTON BEACH'S FUTURE STATE OF PLAY

THE BEST OF
California
VISITCALIFORNIA.COM

2025
OFFICIAL
VISITOR'S
GUIDE



John Stamos

"SUNSHINE, PALM TREES, OPTIMISM... I'M A CALIFORNIA BOY"

visit
California

Paséa Hotel & Spa, Huntington Beach

HUNTINGTON BEACH'S FUTURE STATE OF PLAY



8 GREAT GOLDEN STATE ITINERARIES

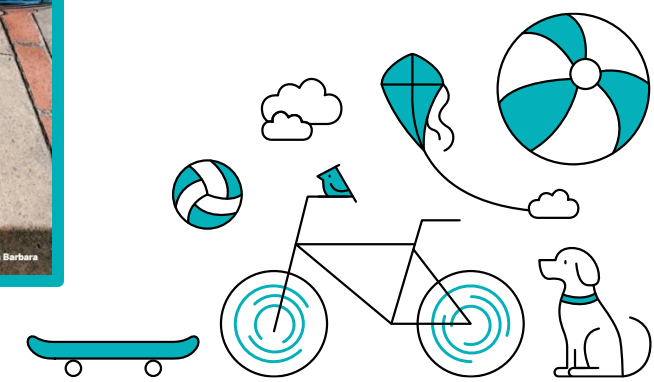
California
ROAD TRIPS

JENNIFER HUDSON

THE CELEBRATED PERFORMER HITS THE OPEN ROAD

visit
California

El Encanto, Santa Barbara



HUNTINGTON BEACH'S FUTURE STATE OF PLAY



HUNTINGTON BEACH'S FUTURE STATE OF PLAY

New Advertising Agency Partner

HUNTINGTON BEACH'S FUTURE STATE OF PLAY

New Advertising Agency Partner



J N S | N E X T

The background image is a photograph of a beach at sunset. The sky is a mix of orange, pink, and blue. In the foreground, several people are silhouetted against the bright horizon. Some are standing, while others are carrying surfboards. The ocean is visible in the distance. The entire image is framed by a decorative border with a repeating pattern of geometric and organic shapes in white and gold.

2025 HUNTINGTON BEACH TOURISM SUMMIT



The background of the image is a teal-colored photograph of the Huntington Beach Pier and its lifeguard tower. The pier is a long wooden structure extending into the ocean, with many people walking on it. The lifeguard tower is a multi-story building with a distinctive roof, situated at the end of the pier. The sky is clear and blue, and the water is a deep blue. The entire image is framed by a decorative border with a repeating pattern of geometric and organic shapes, including circles, squares, and stylized waves. The text "2025 HUNTINGTON BEACH TOURISM SUMMIT" is overlaid in the center of the image in a large, bold, white sans-serif font.

2025 HUNTINGTON BEACH TOURISM SUMMIT

Caroline Beteta

President & CEO,
Visit California



An aerial photograph of Huntington Beach, California, featuring the iconic Pacific Coast Tower in the center. The image is framed by a decorative border with a teal top and bottom section and orange side sections, all containing white geometric and nature-inspired patterns. The text "2025 HUNTINGTON BEACH TOURISM SUMMIT" is overlaid in large, bold, white capital letters.

2025 HUNTINGTON BEACH TOURISM SUMMIT

The background of the image is a teal-colored photograph. It features a silhouette of a surfer in the center, riding a wave. To the left, a lighthouse is visible in the background. The entire image is framed by a decorative border with an Art Deco style, featuring various geometric and organic patterns in white lines. The text is centered in the lower half of the image.

2025 HUNTINGTON BEACH TOURISM SUMMIT

Omark A. Holmes

MBA, CDME

Chief Marketing Officer



Cindy Decker

Senior Manager, Client
Relations & Insight



Drivers and Roadblocks for Travel

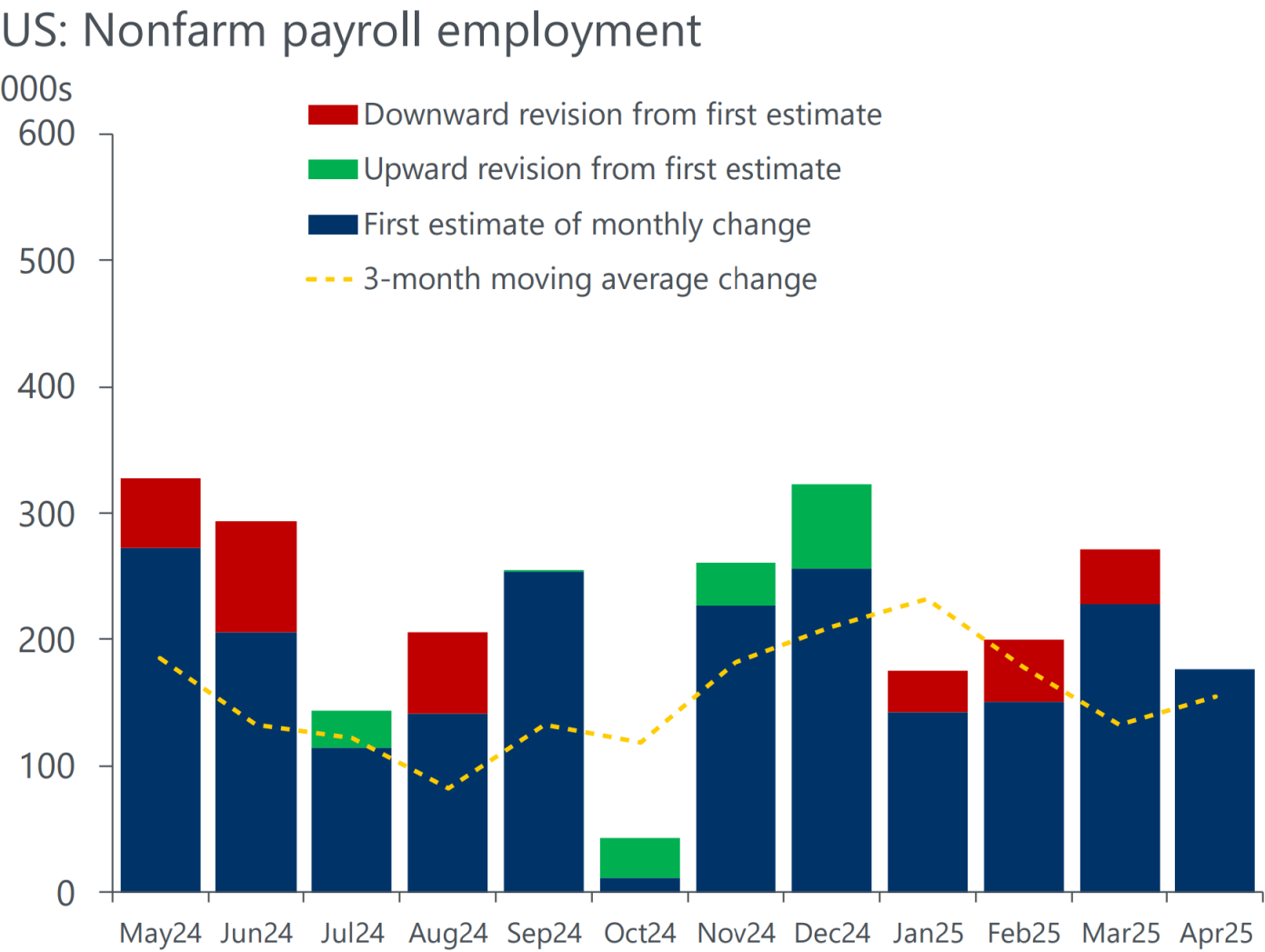
Where do we go from here?

Cindy Decker | Senior Client Relationships & Insights, Tourism Economics |
cdecker@oxfordeconomics.com



State of the Economy

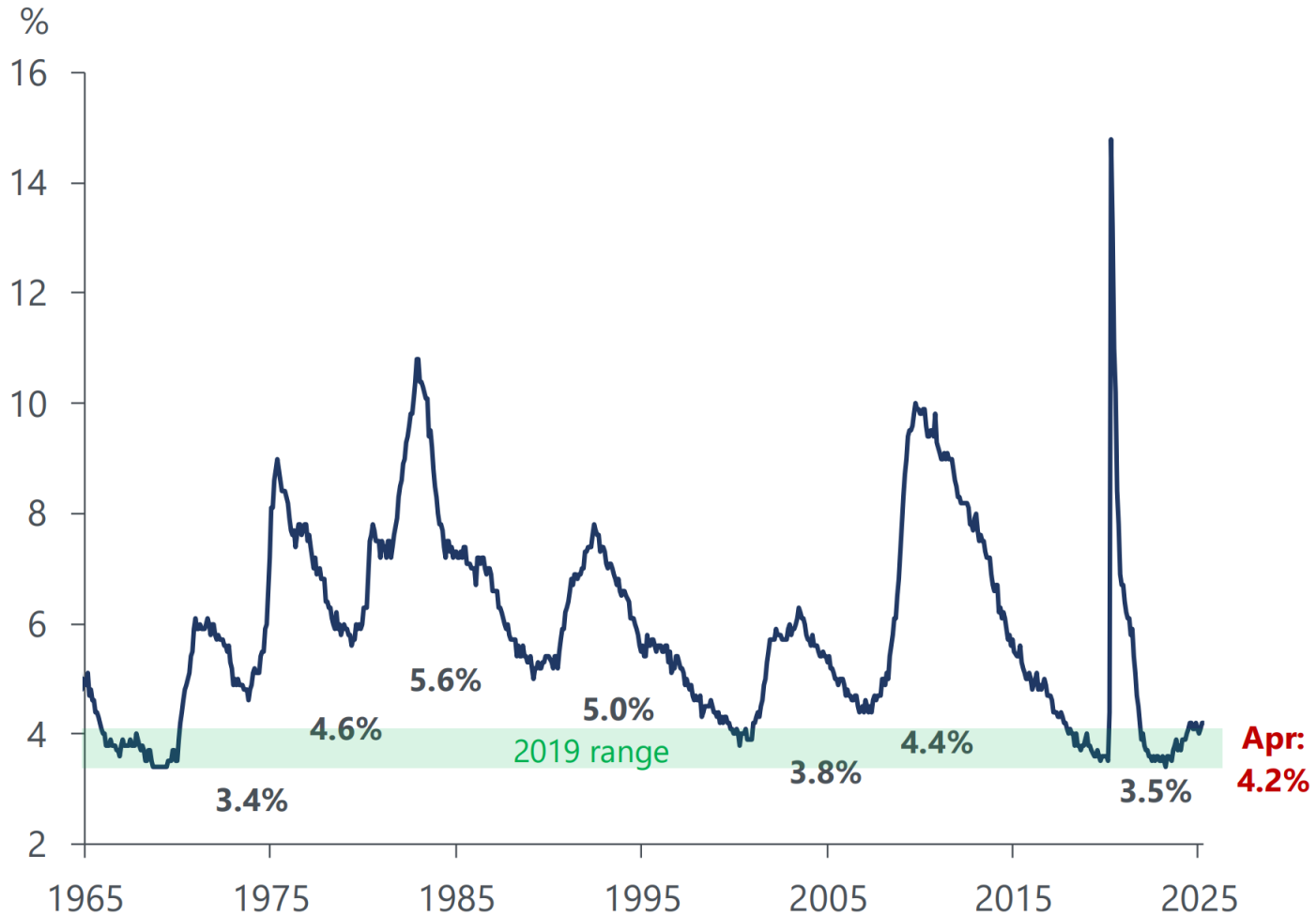
Jobs growth rose in April, even after downward revisions



Source: Oxford Economics/BLS/Haver Analytics

Unemployment remains at 4.2%

US: U-3 unemployment rate



Source: Oxford Economics/Haver Analytics

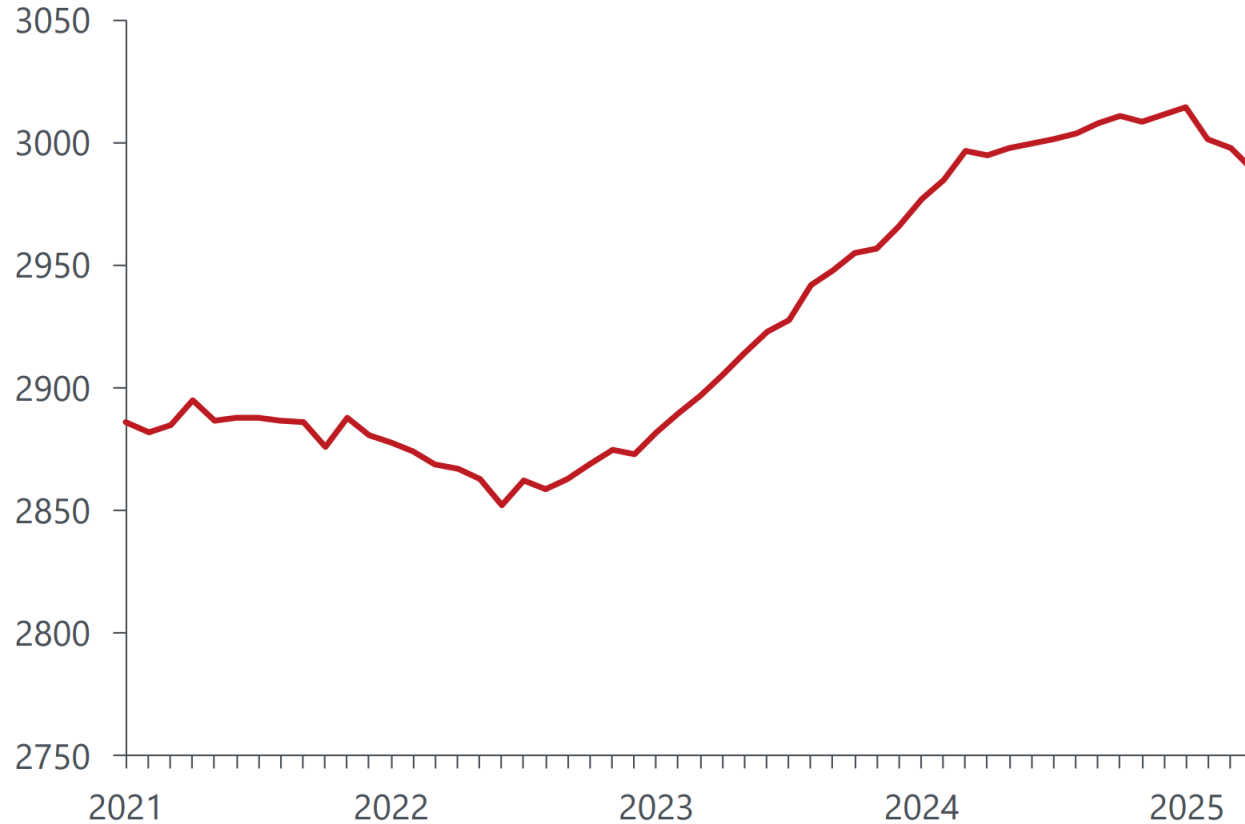
Layoffs are low...

But those seeking work are finding it harder to secure jobs.

Federal employment declined again, more weakness to come

US: Federal employment

Thousands



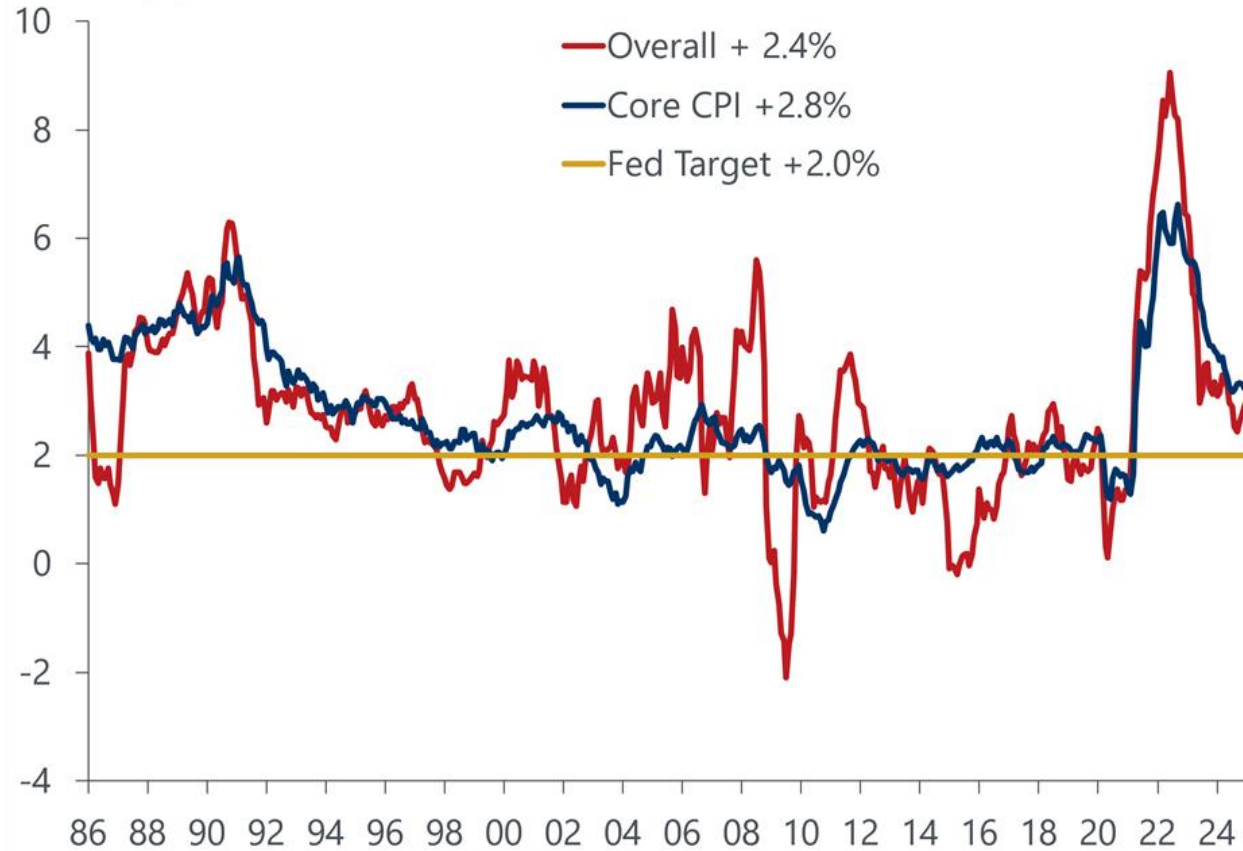
Source: Oxford Economics/Haver Analytics

The federal hiring freeze and federal layoffs will result in a **net decline of 200,000 federal workers this year.**

Inflation fell to 2.4% in March

US: Consumer Prices

Percent y/y



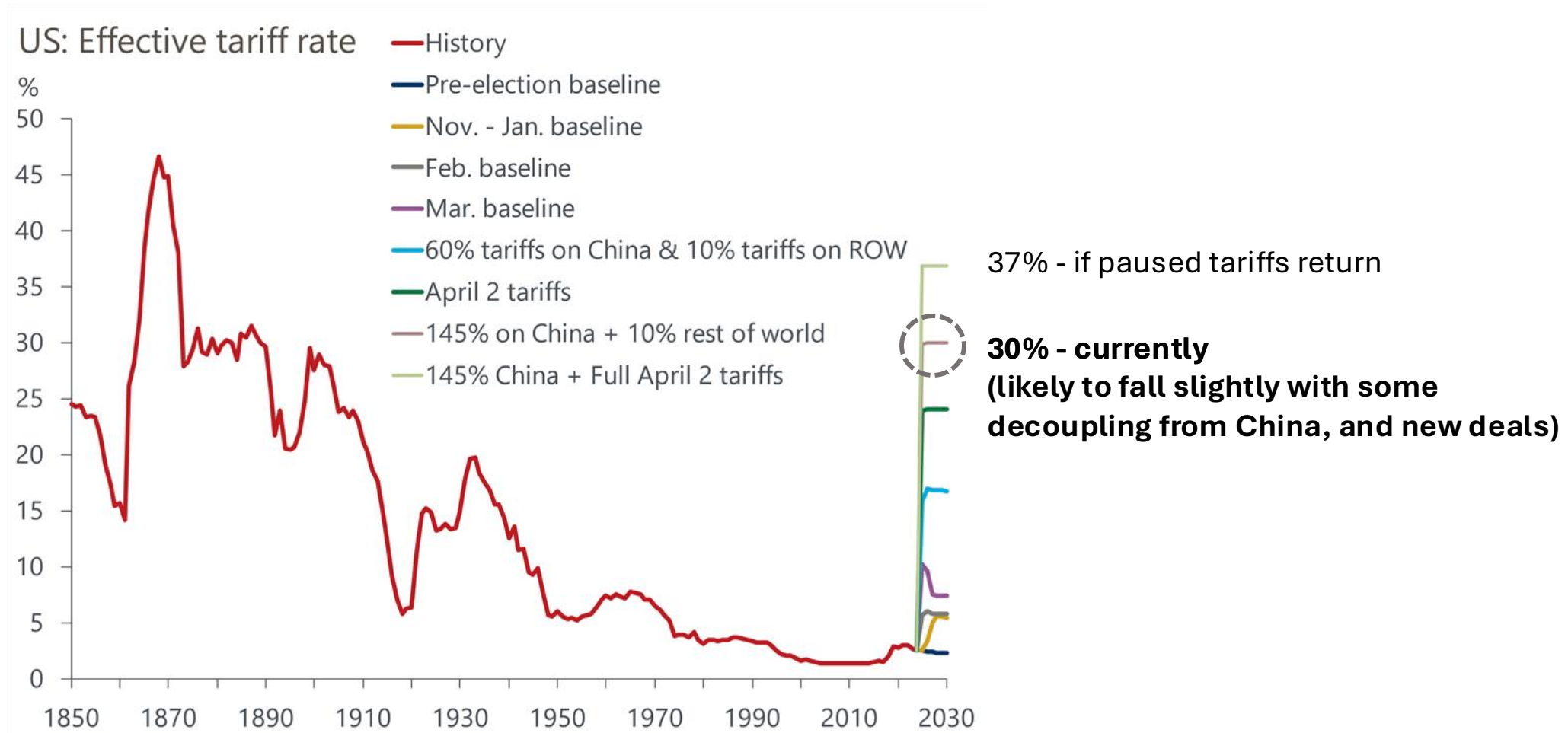
Source: Oxford Economics/Bureau of Labor Statistics

But.....



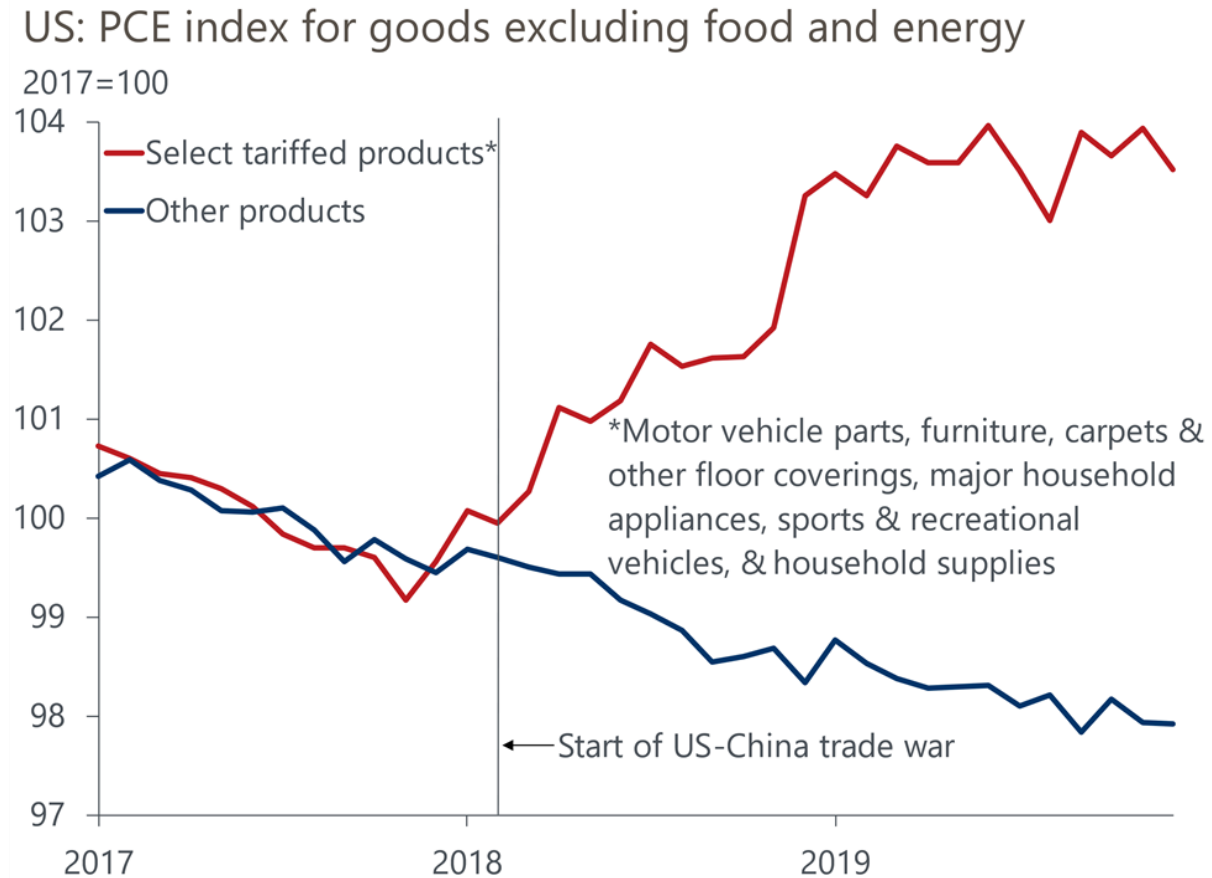
**U.S. TARIFFS
AHEAD**

Trade-weighted tariff rate highest in since 1880s



Source: Oxford Economics

Tariffs pose risk to inflation and supply chains



Source: Oxford Economics

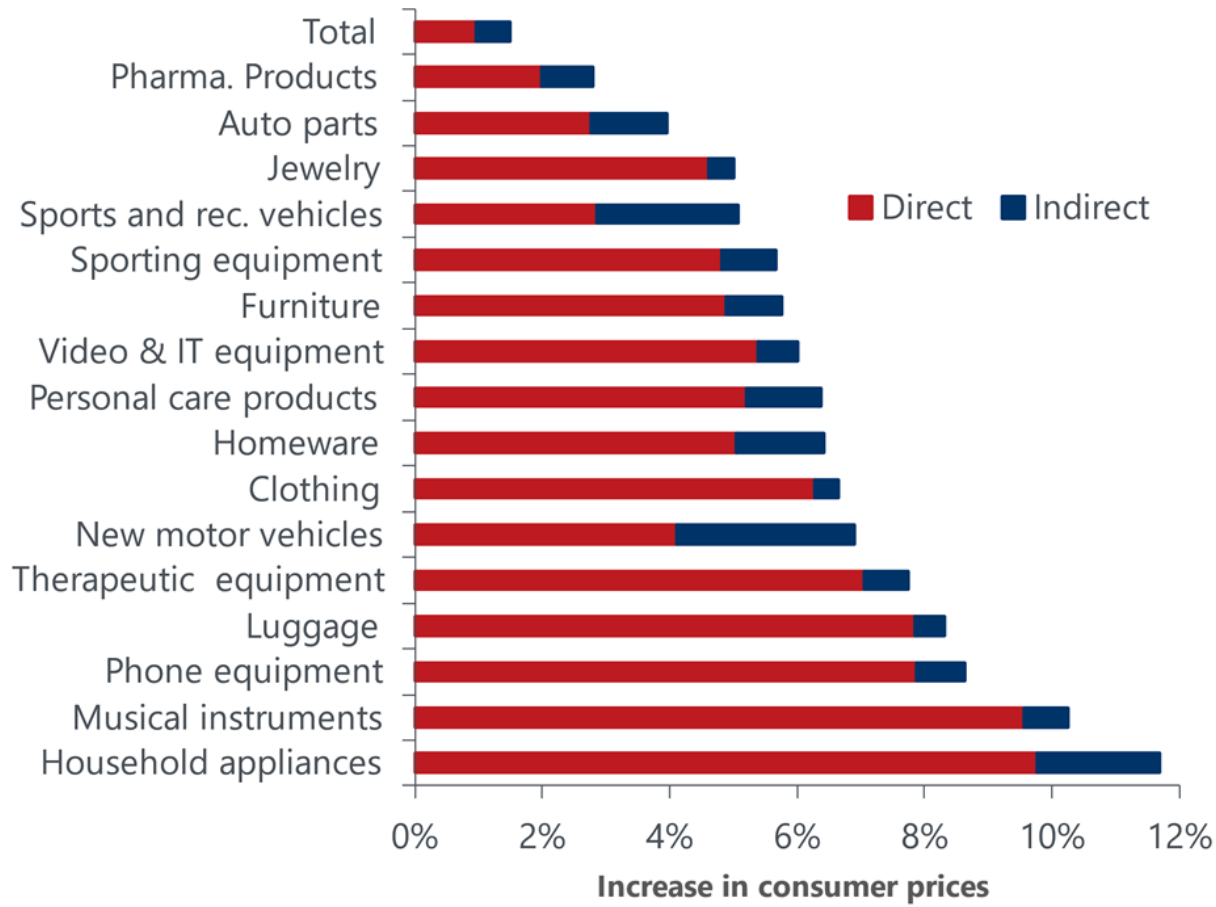
US core inflation to rise to 4.5%

Building factories here has pros and cons:

- Shield us from tariffs but will take years to build.
- Add jobs but US production has higher input costs than other countries, meaning higher prices.
- Be made in America but requires significant tech advancements

Some goods will experience large price hikes

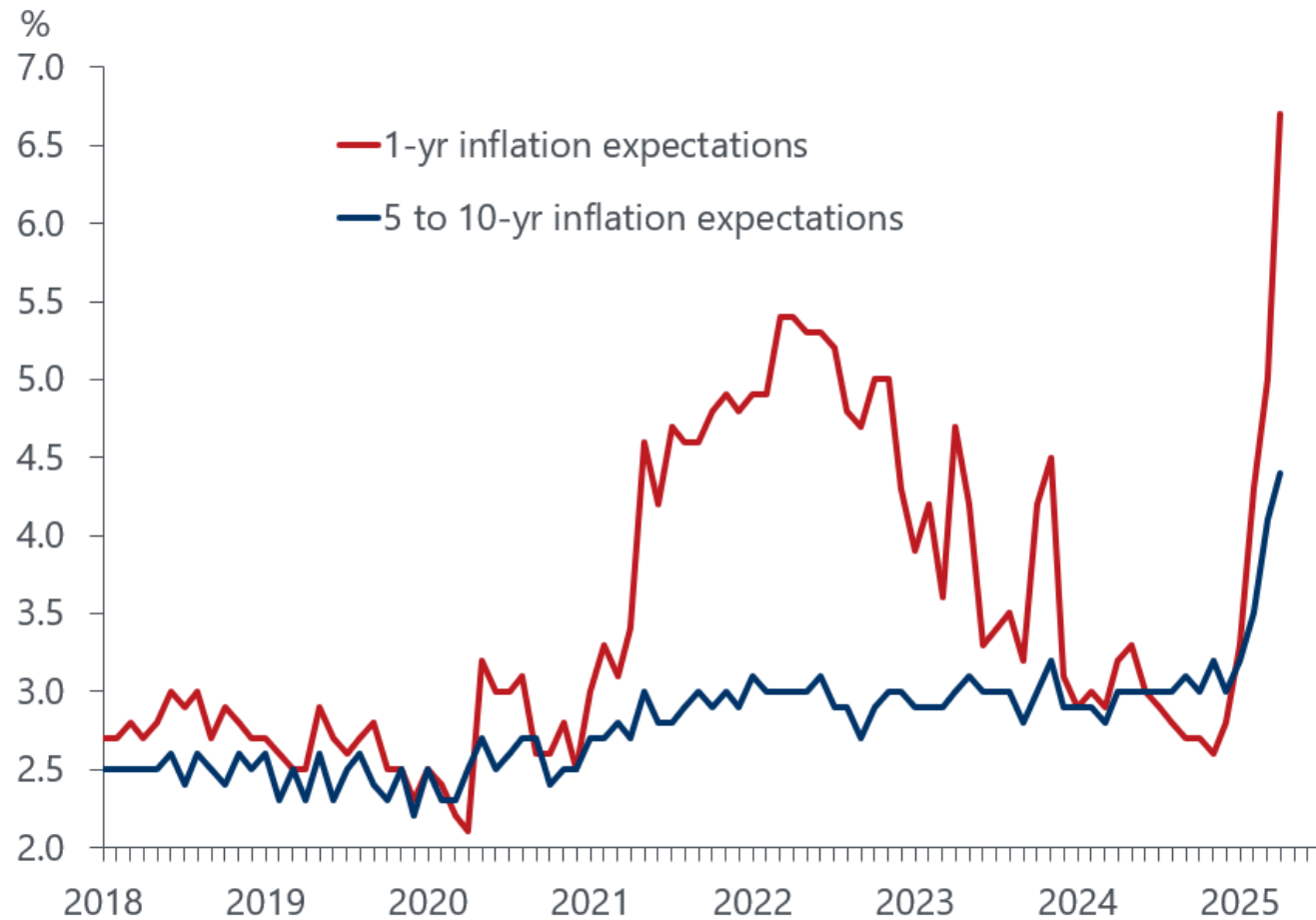
US: Potential tariff impact on consumer prices



Source: Oxford Economics

Inflation expectations have skyrocketed

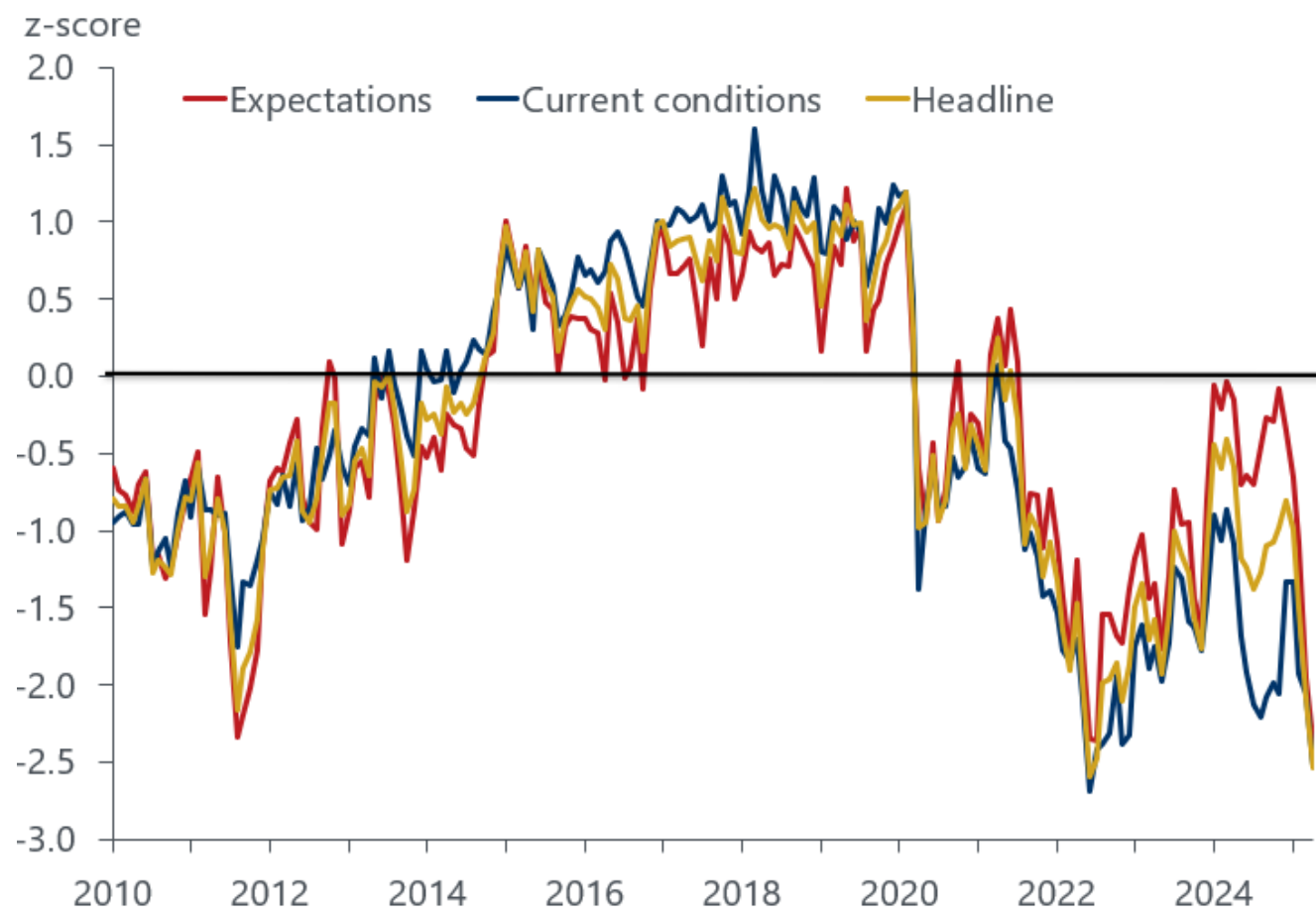
US: Michigan consumer inflation expectations



Source: Oxford Economics/University of Michigan

Consumer more downbeat

US: Michigan consumer sentiment



Source: Oxford Economics/University of Michigan

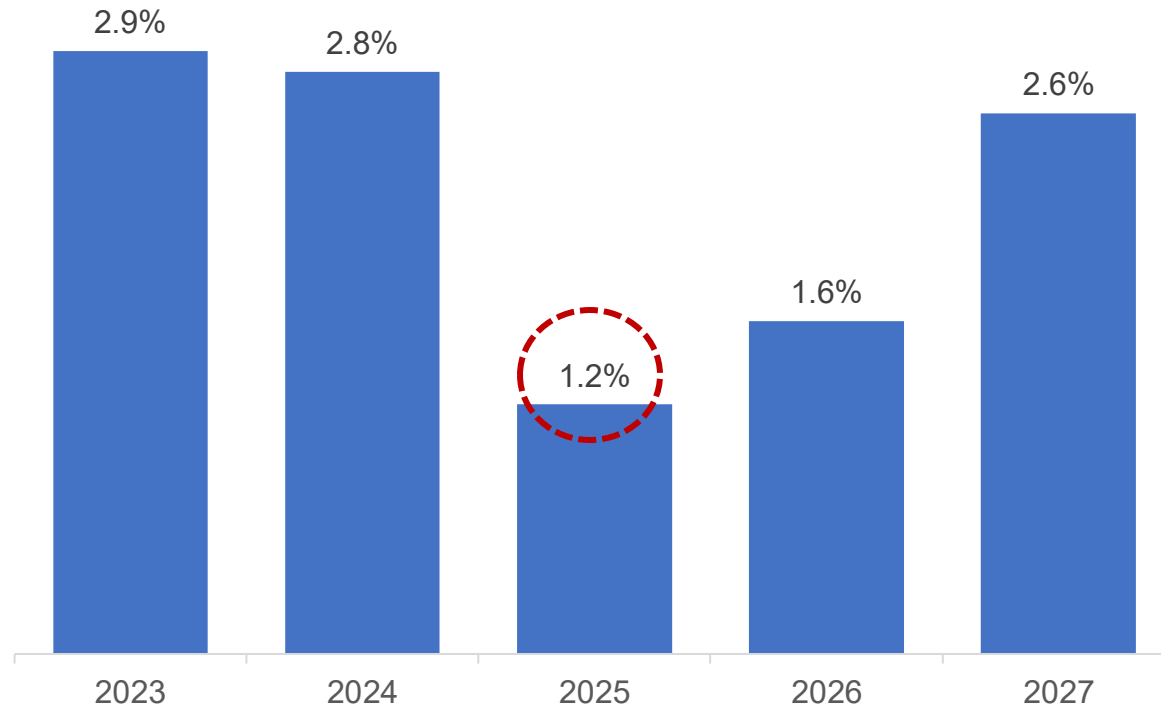
The drop in sentiment due to the turbulence in the stock market, fear over economy, impact on jobs, and tariffs.

Consumers likely to frontload or delay purchases, resulting in a period of weakness into H2.

Economic growth will slow markedly in 2025

US Real GDP

\$ annualized



Source: Oxford Economics

The economy is vulnerable and has little margin for error.

Un-pausing reciprocal tariffs will plunge the US into a recession.

Unemployment rises to 4.8% this year

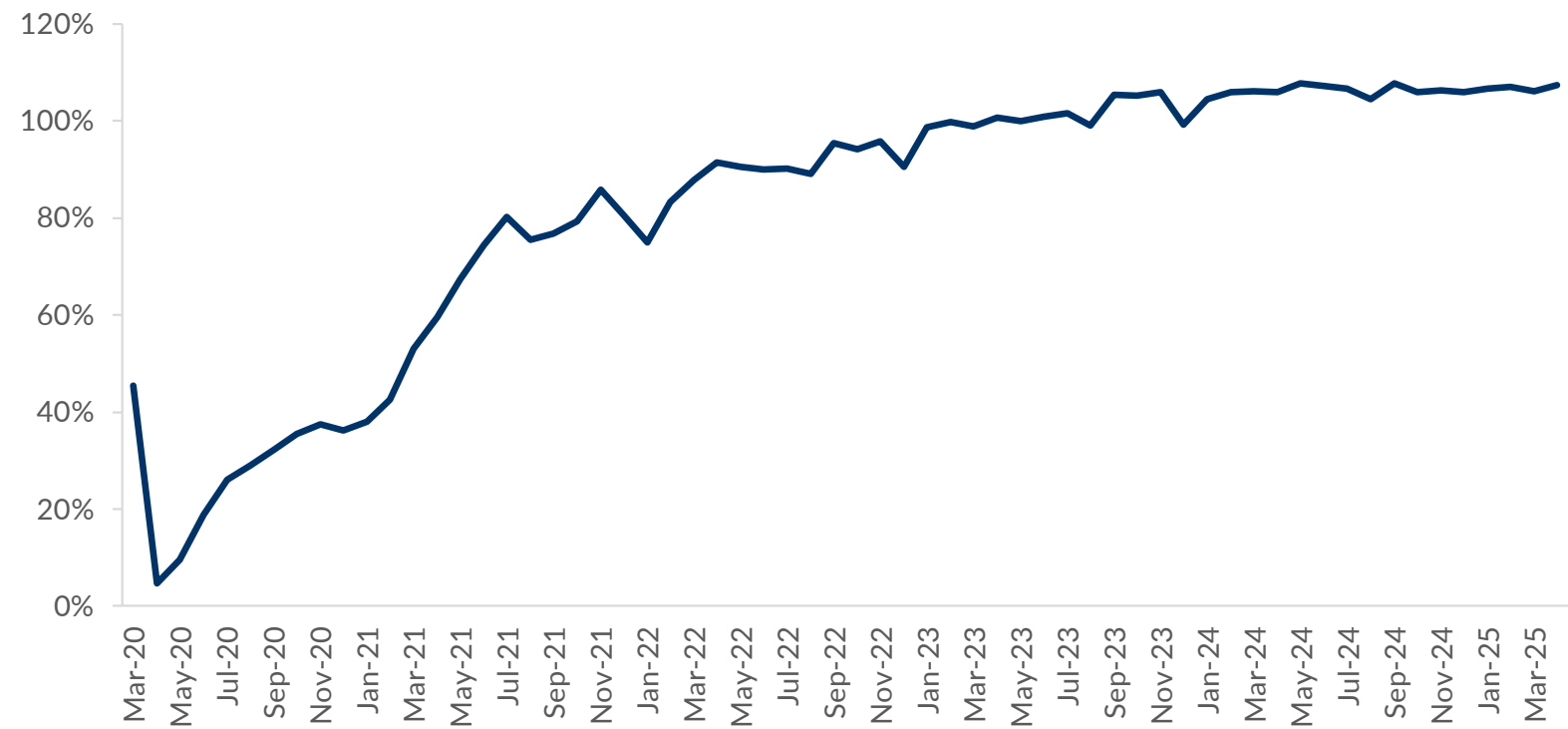
The economy will improve next year, supported by tax cuts/extensions and the fading effects of tariffs on inflation and real disposable income.

Leisure Travel



Air travel is holding up

US Air Passenger Volume
% of 2019 level



Source: TSA

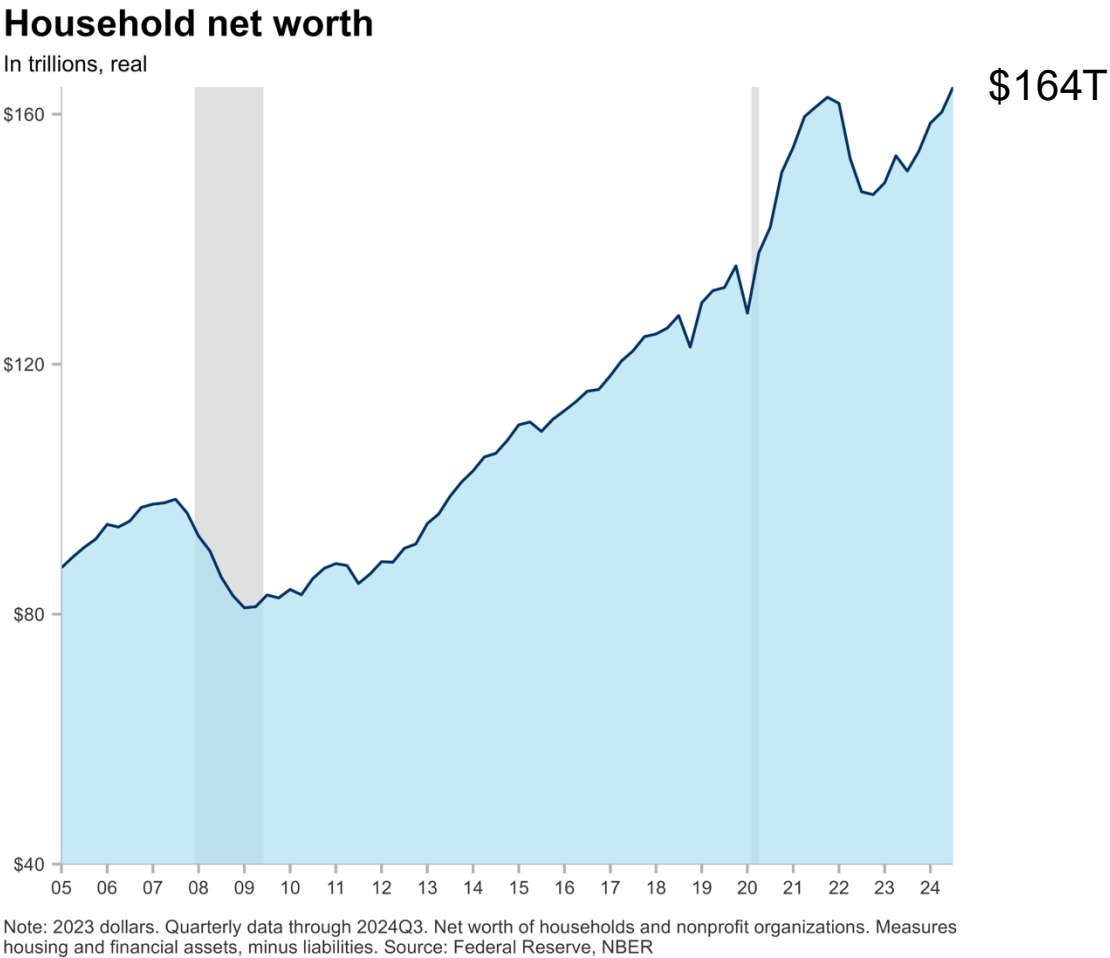
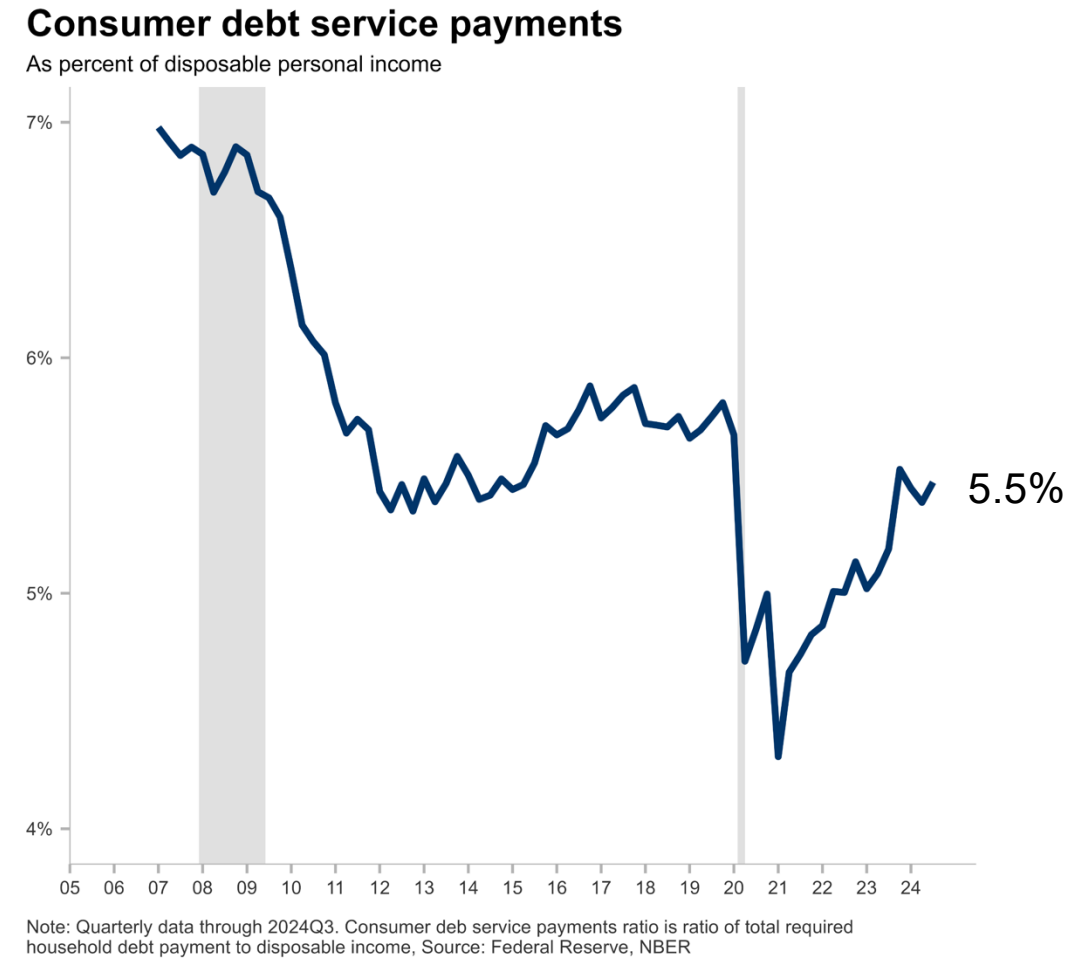
Income growth will sustain some spending growth

US: AHE total vs production & nonsupervisory



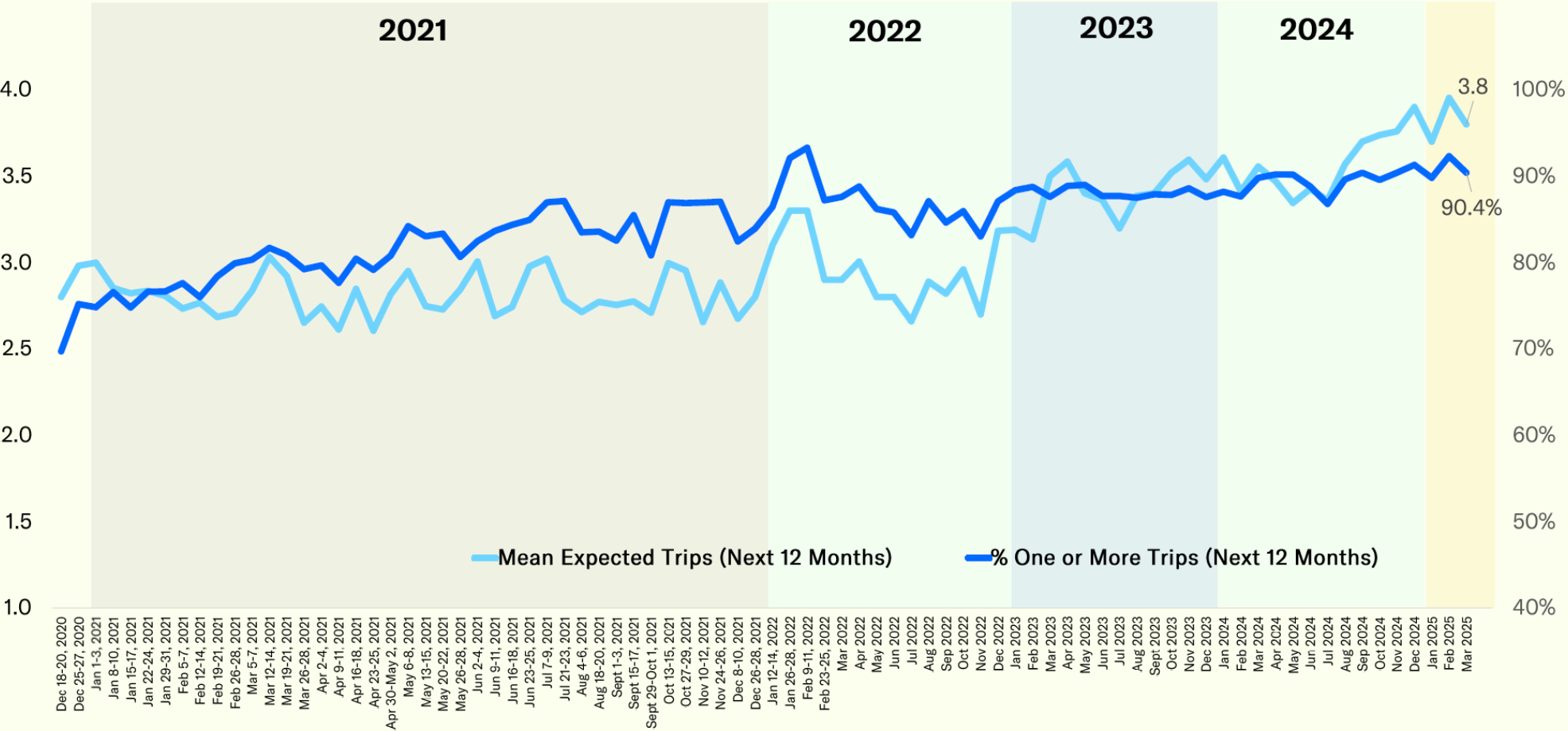
Higher inflation will weigh on real disposable incomes

Balance sheets strong



Intended leisure trips dipped in March

Question:
IN TOTAL, how many
leisure trips (of 50
miles or more from
your home) do you
expect to take in the
NEXT TWELVE (12)
MONTHS? (Select
one)



MMGY's recent survey reveals weakening environment

- **4% drop in travel intentions** over the next 12 months compared to mid-February study
- In the next six to 12 months, **80% of U.S. consumers say their travel behavior will change as a result of the recent financial news.**
 - 33% say they will travel closer to home
 - 24% say they will change to a less expensive mode of transportation
 - 22% say they will change their length of stay
 - **29% say they will change from an international destination to a domestic destination**
- **Over half (53%) of U.S. consumers believe that American travelers will be less welcome in other countries** as a result of the recent tariff policy decisions.

MMGY Flash survey fielded April 3–5

<https://mmgyintel.com/u-s-travelers-undeterred-by-tariffs-and-recession-talk/>

Business and Group Travel

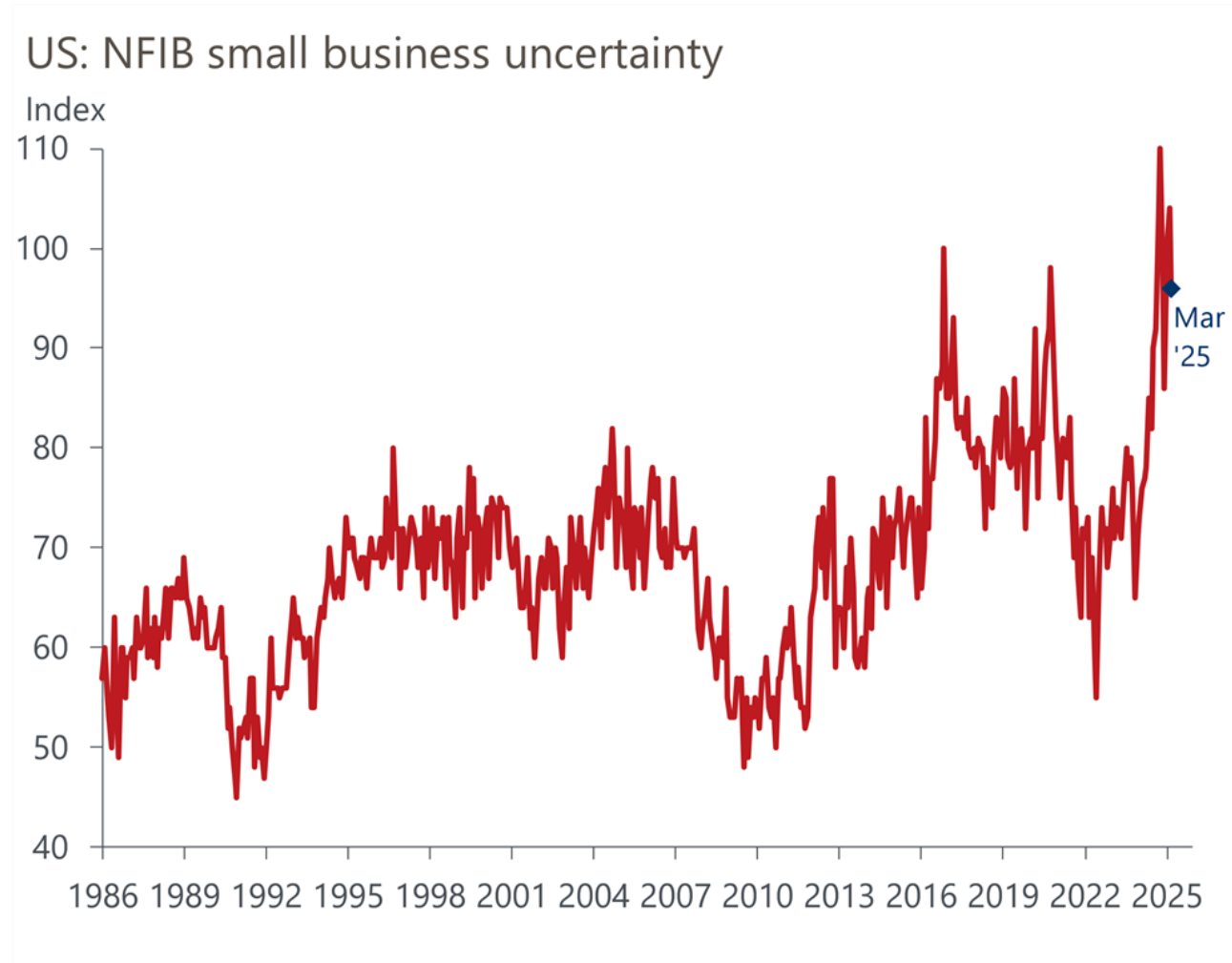
A wide-angle, low-perspective shot of a modern airport terminal. The space is characterized by a high ceiling with a series of parallel wooden beams and large windows on the left side that let in natural light. The floor is highly reflective, showing the silhouettes of people and the structural elements of the building. In the foreground and middle ground, several people are walking away from the camera, some pulling rolling suitcases. The overall atmosphere is one of a busy, yet orderly, travel hub. The text 'Business and Group Travel' is superimposed in a large, bold, white sans-serif font on the left side of the image.

Business travel intentions strong

Planning Business Travel Within the Next 6 Months
% of American Consumers



Business uncertainty poses a major risk

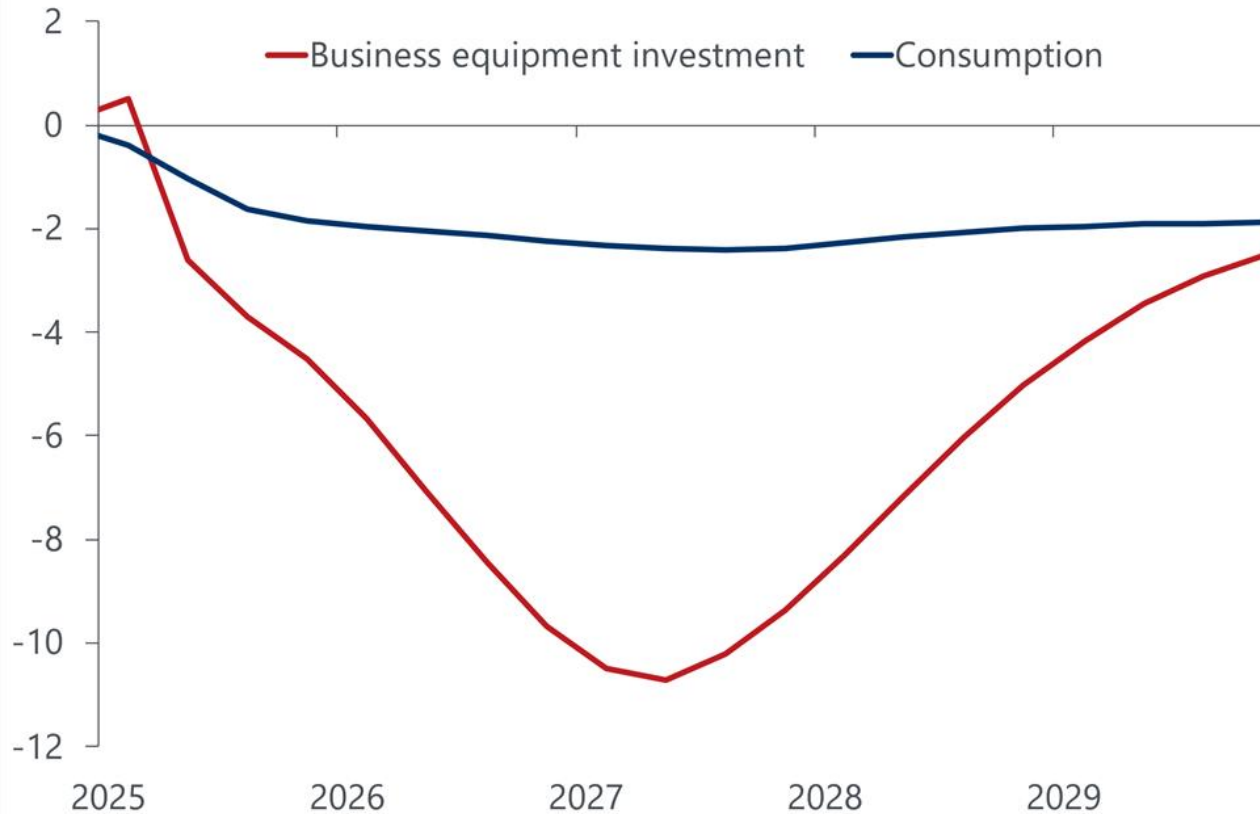


Source: Oxford Economics/NFIB

Weaker corporate investment will impact business travel

US: Change in Oxford Economics April baseline

% difference from March baseline



Capital spending and hiring by firms is held back by trade policy uncertainty, higher interest rates, and higher prices.

Tariffs are particularly **harmful for small businesses** as they attempt to manage their cashflow.

Budget cuts likely to curtail government employee travel.

International



Visitor sentiment toward the US is falling

Strained relationships over policies and proclamations:

- Trade war and rhetoric

Fear Factor:

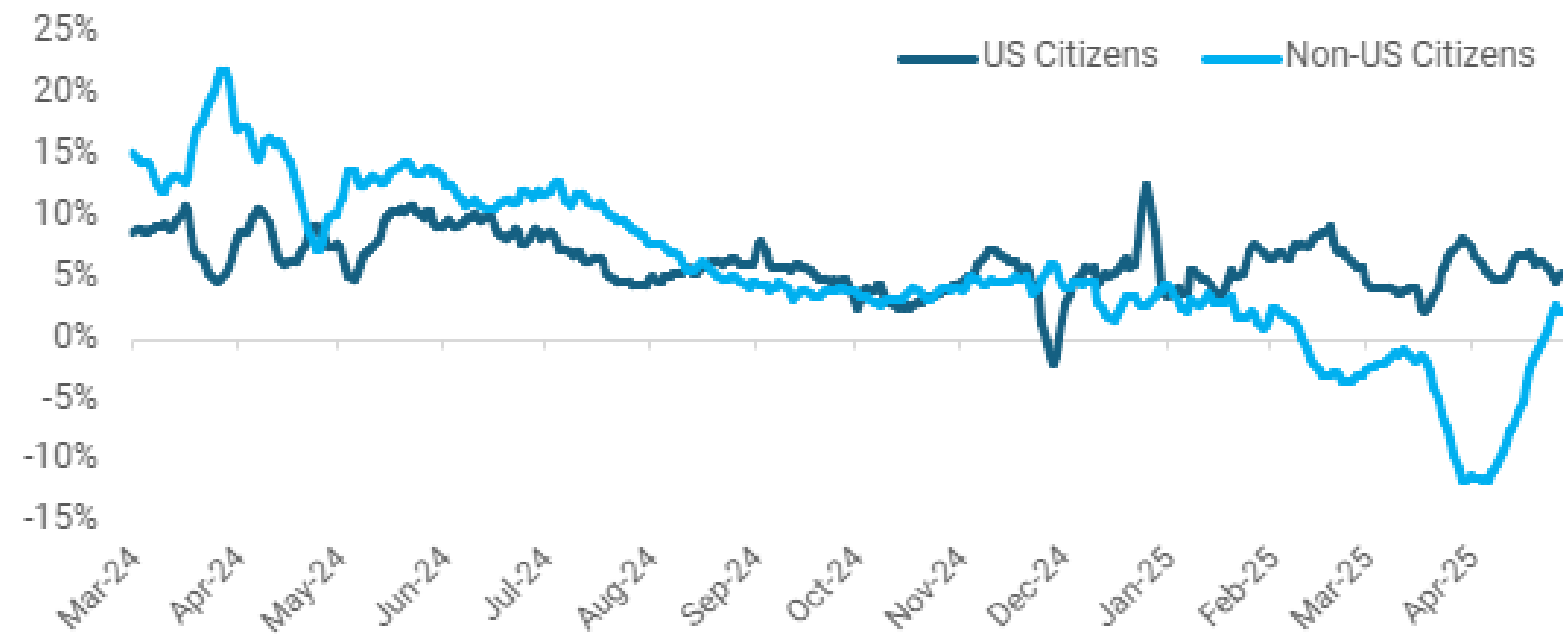
- Deportations, detainments and associated travel warnings

(+ Potential expanded travel ban in the wings)

CBP data show a steep slide

Inbound screened passengers

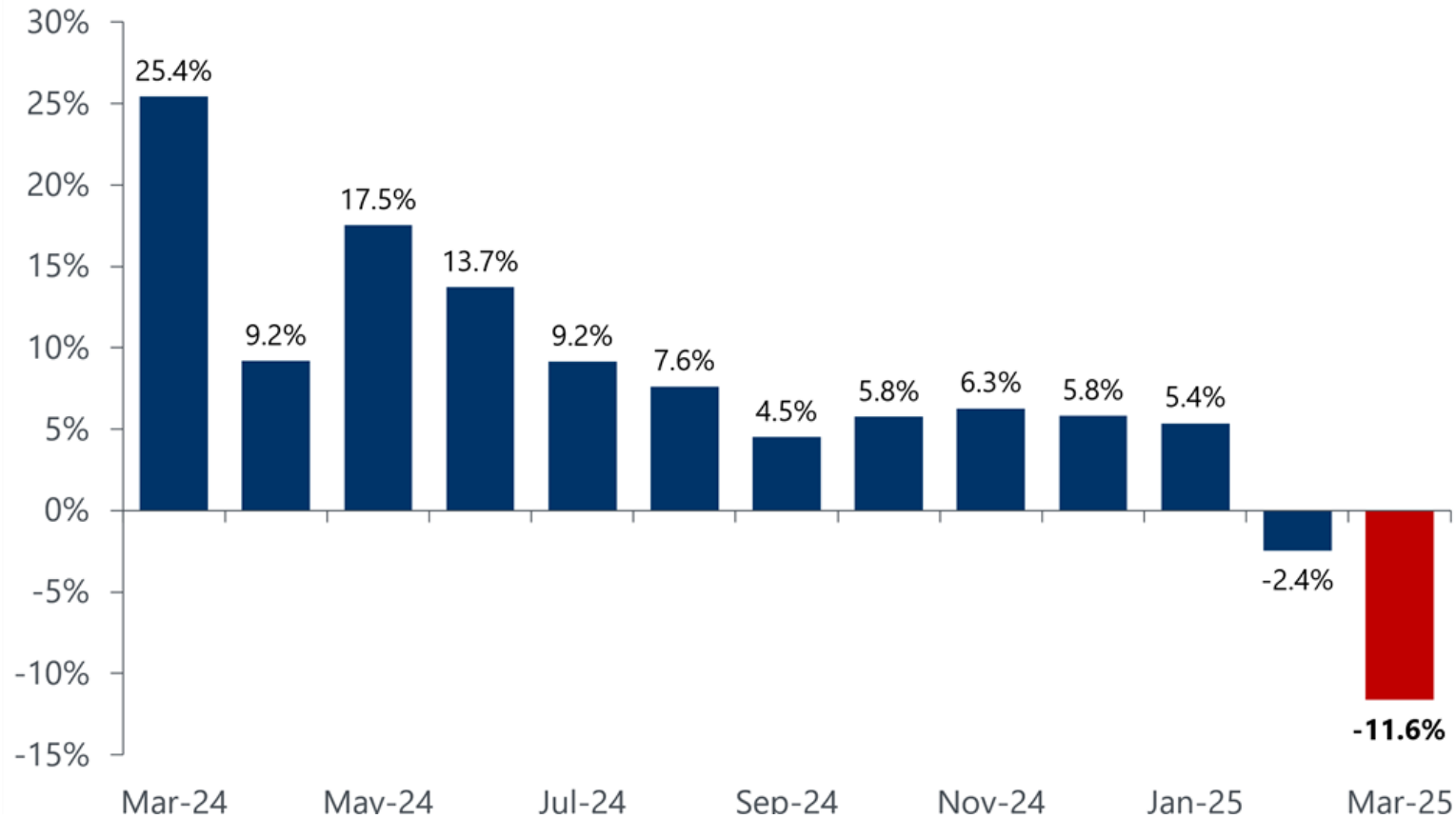
Percent change in average pax over 28 days vs same 28 days last year



Effects are already evident

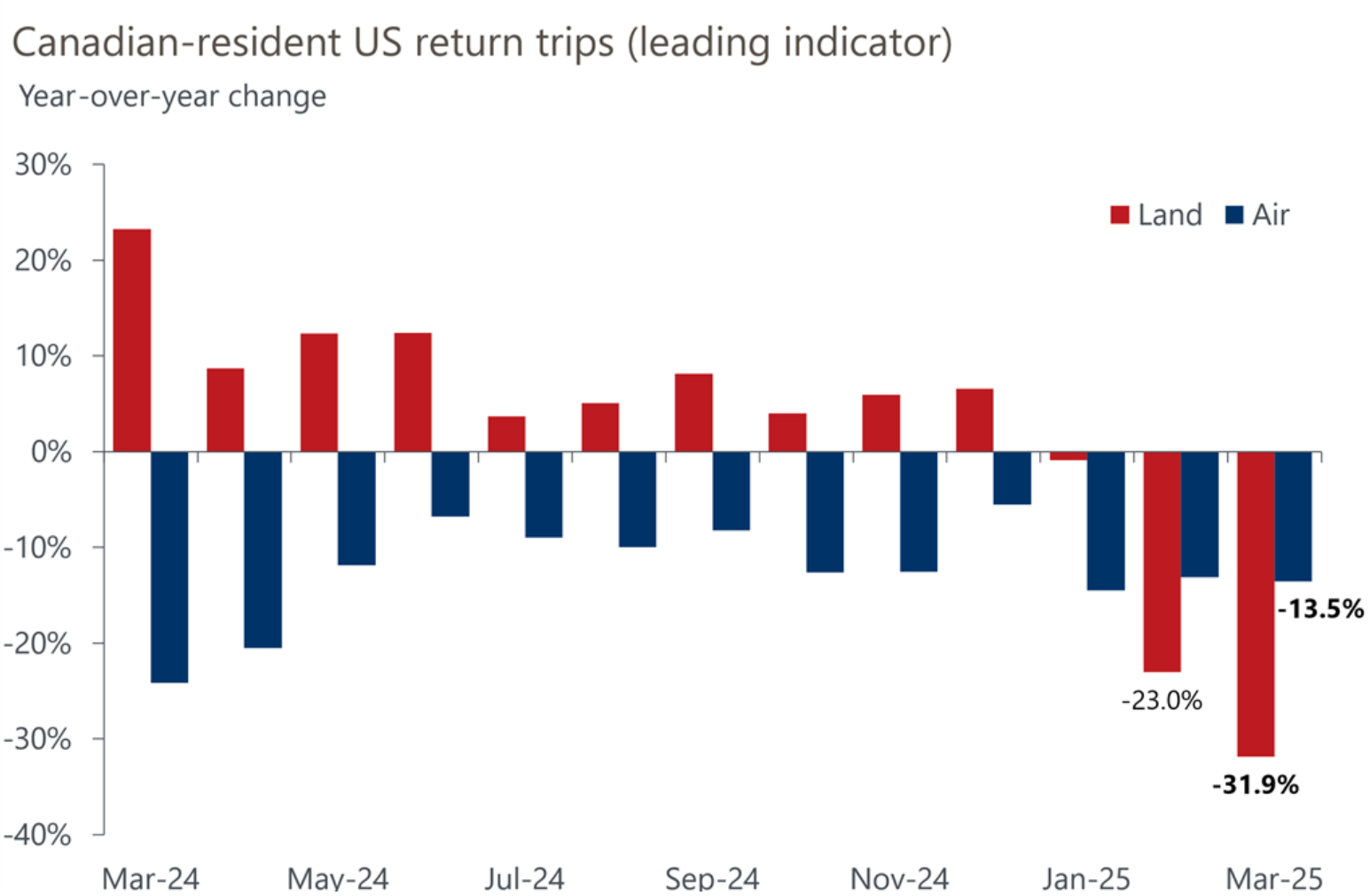
Overseas visitor arrivals to the US

Year-over-year change



Source: National Travel and Tourism Office

Particularly in Canada

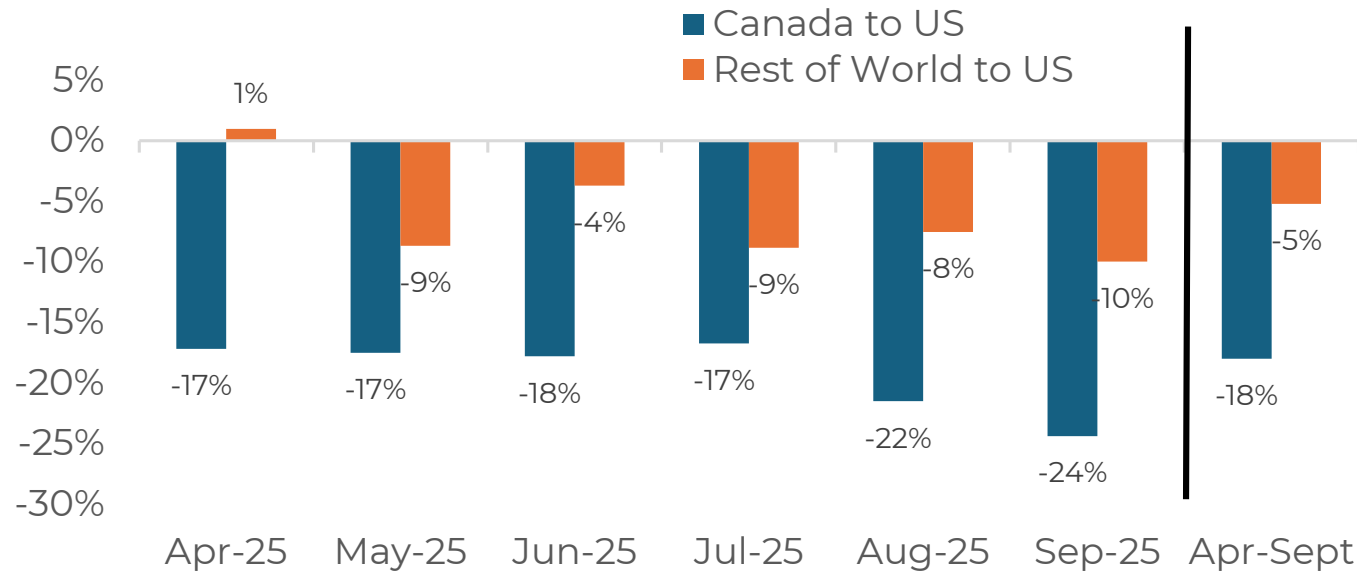


Source: Statistics Canada

Forward bookings point to steeper declines

Air bookings as of February 2025 to the US, by month

Year-over-year % change (bookings in February 25)



“We've already started the process of reducing capacity with a big drop in Canadian traffic into the US.”

United Airlines earnings call
(March 11, 2025, edited for brevity)

Source: OAG

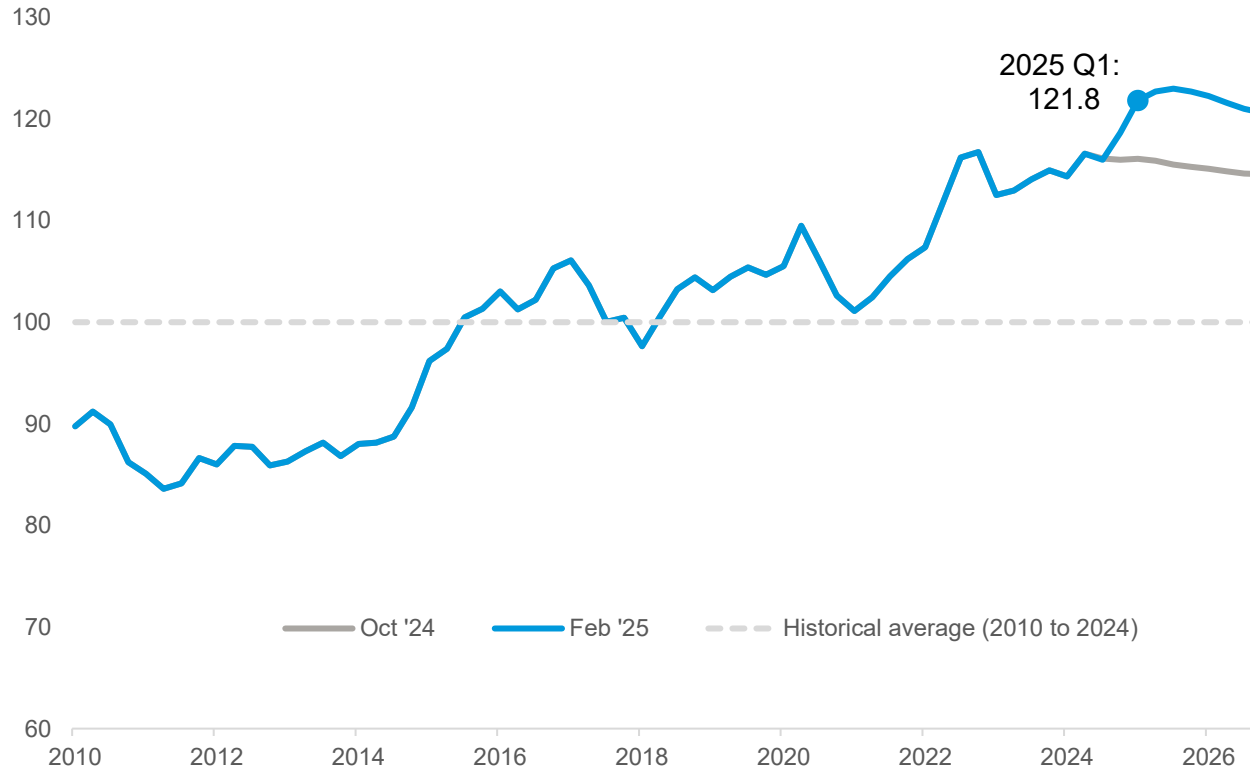
Bookings on U.S.-bound routes down about 10% amid tariff backlash: Air Canada

Mar 31, 2025 Updated Mar 31, 2025

Further strengthening in US dollar reduces affordability

Forecast comparison: US dollar

Exchange rate index (historical average=100)



The current forecast anticipates a US dollar that is 6% stronger than in the pre-election forecast.

The dollar is now approximately 22% stronger than its recent historical average (2010 to 2024).

Making the US a more expensive destination.

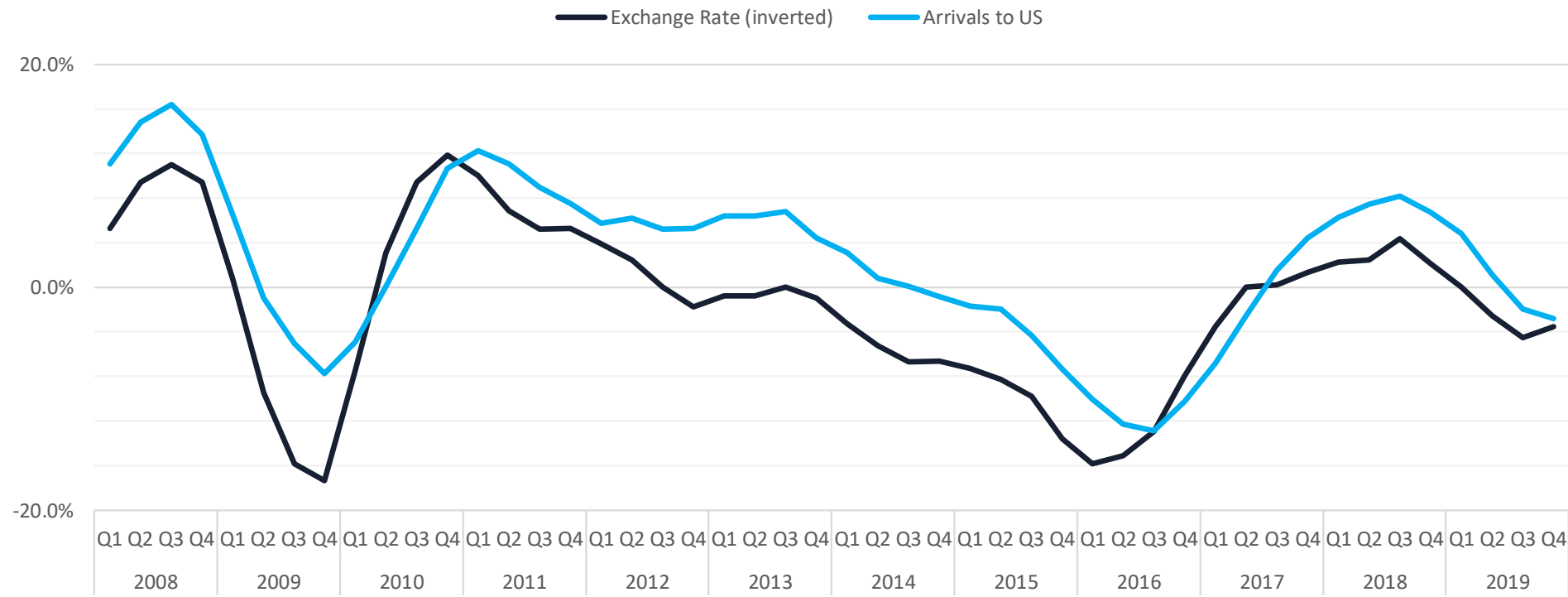
Note: The exchange rate index shows the value of the domestic currency relative to a trade-weighted basket of foreign currencies. The index is calculated on a real basis, adjusting for differentials in price inflation between countries. Periods in which the index is above its historical average (2010 to 2024) represent periods in which the domestic currency is relatively stronger than it has been historically.

Source: Oxford Economics, Haver Analytics

...which alone will constrain the Canadian market

Canada's exchange rate (inverted) vs arrivals to US

Year-over-year growth

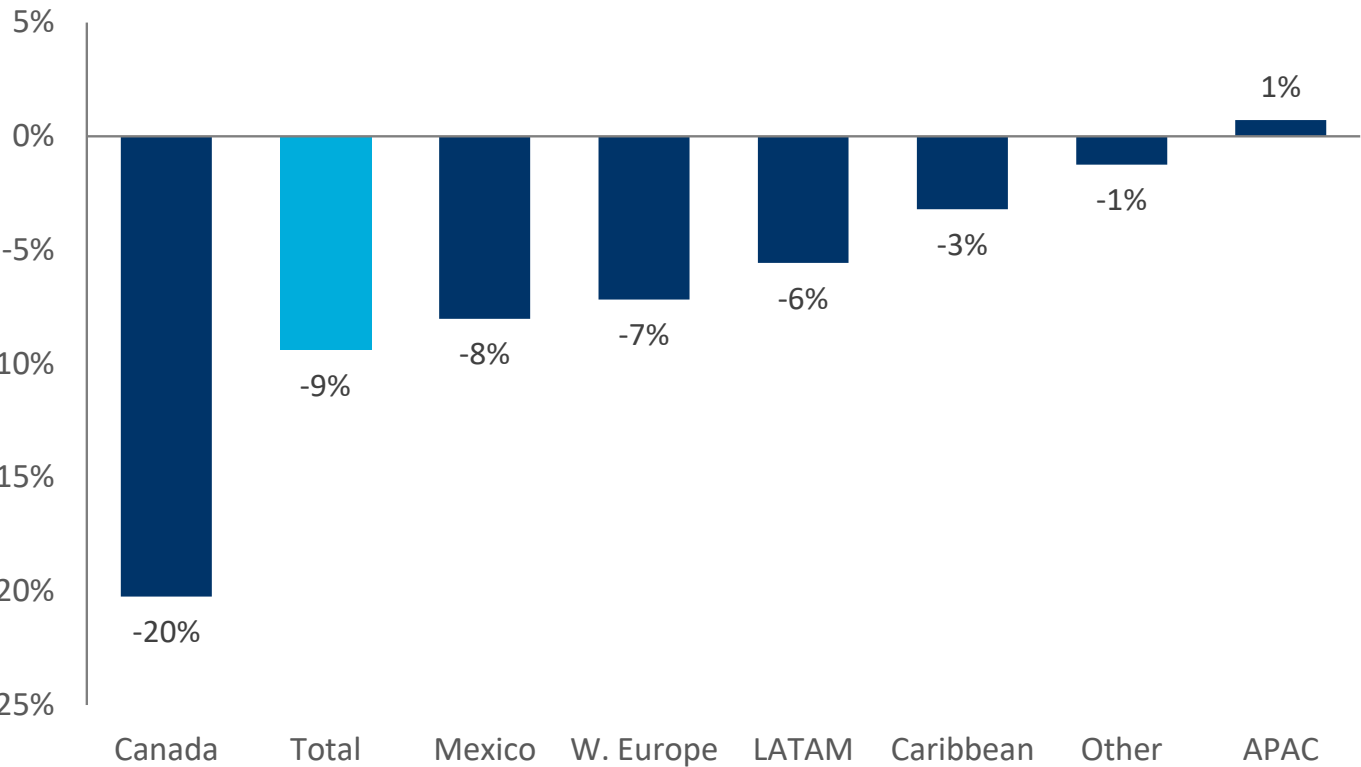


Source: Oxford Economics/Haver Analytics, NTTO, Tourism Economics

Losses are expected to be widespread

US inbound arrivals growth by key source region, 2025

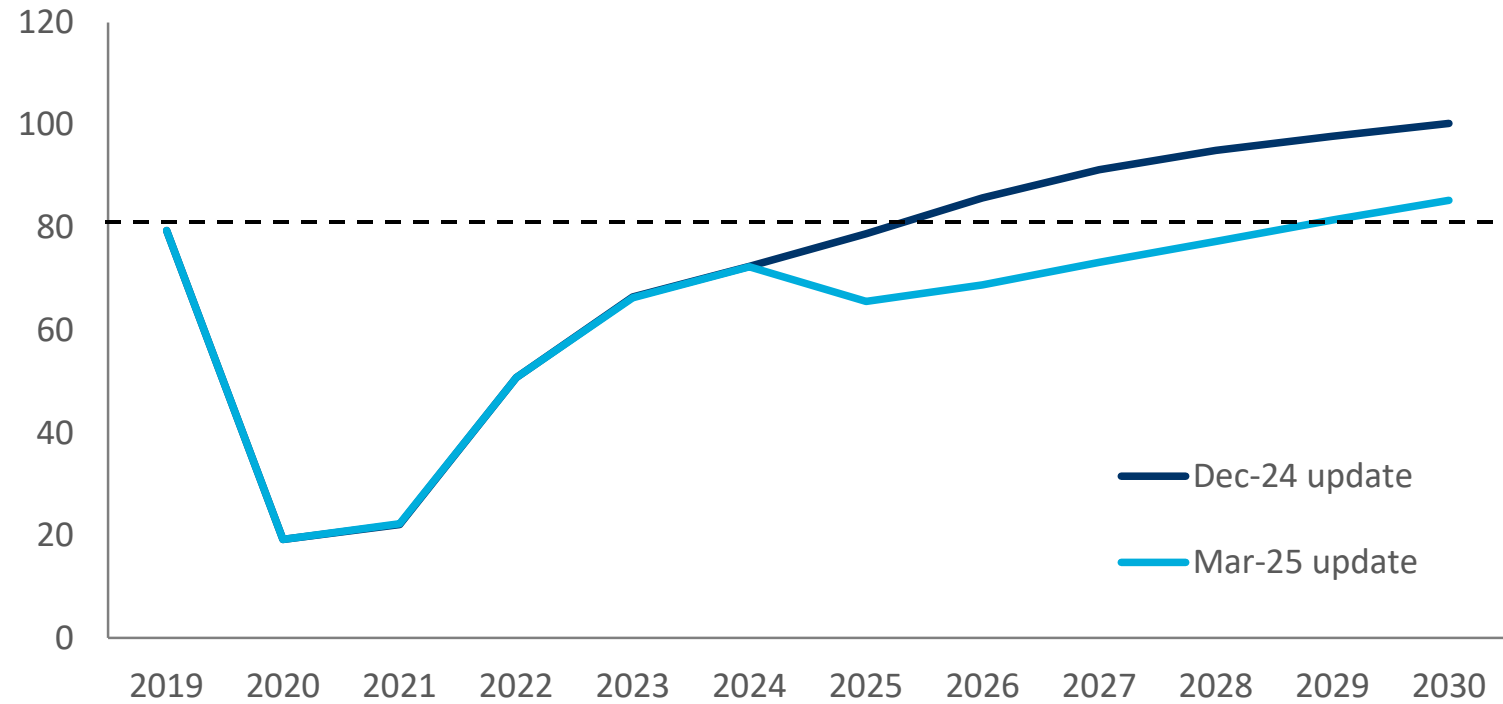
% y-y growth



US inbound arrivals recovery delayed to 2029

US inbound arrivals

Visits, mns



In December, we forecasted inbound arrivals would recover by **2026**.

Our latest estimate suggests this will occur in **2029**.

Recovery delayed to
2029

Source: Tourism Economics

Final thoughts

Drivers **and** Roadblocks

Domestic Leisure

- + Real income growth
- + Solid balance sheets
- + Tax cut extensions
- Tariff effects on prices
- Tariff effects on income
- Economic policy uncertainty
- Softening labor market

Domestic Business

- + Tax cut extensions
- Tariff effects
- Immigration restrictions

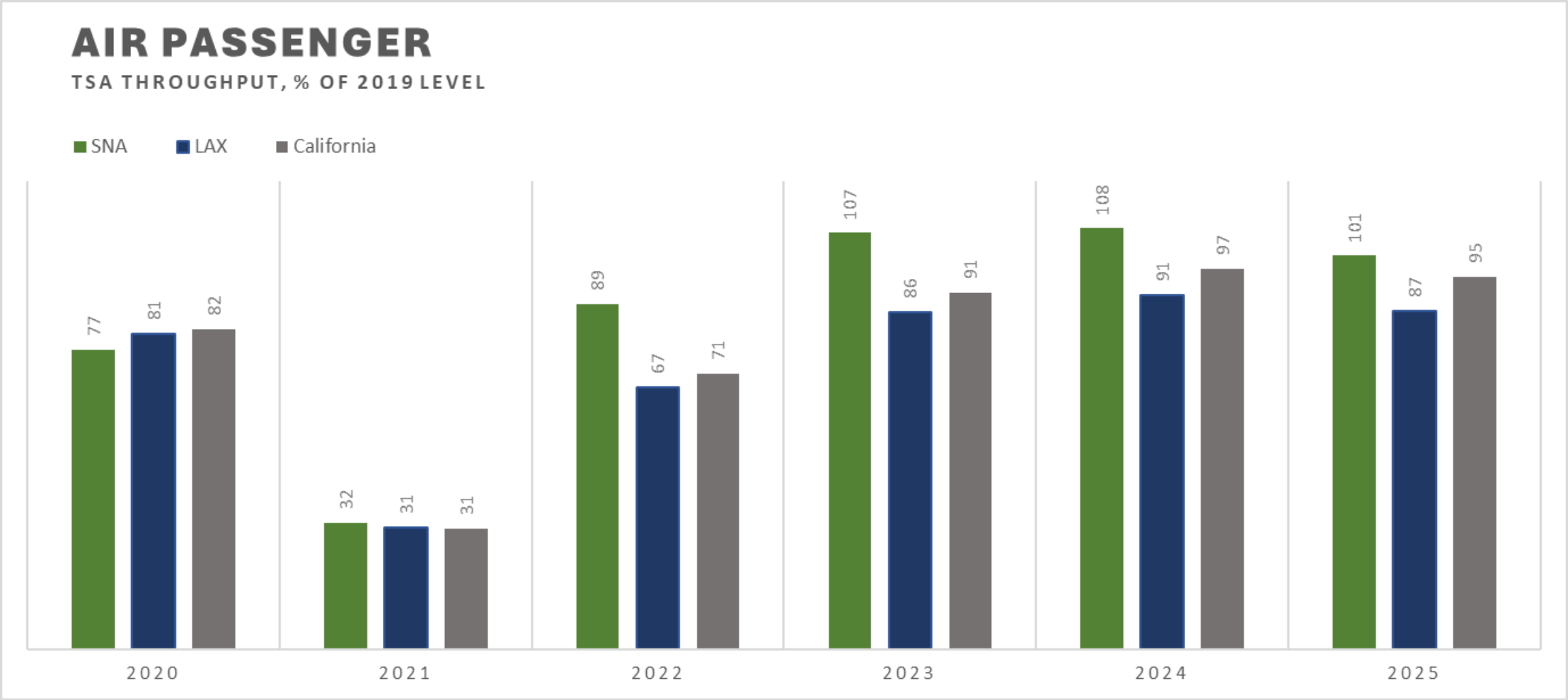
International

- + Pent up demand
- + Upcoming events
- Dollar strength
- Travel sentiment



Huntington Beach

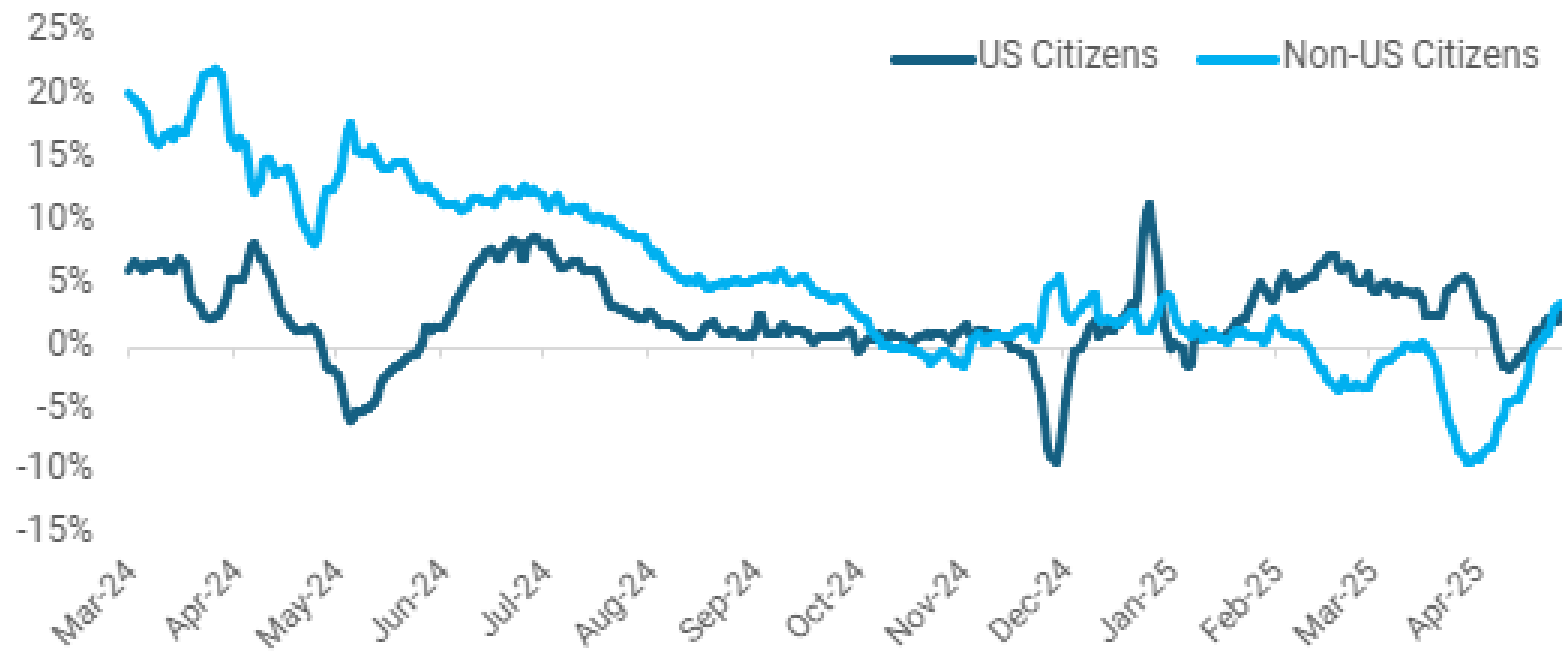
Air Travel to SNA is still strong, but slowing



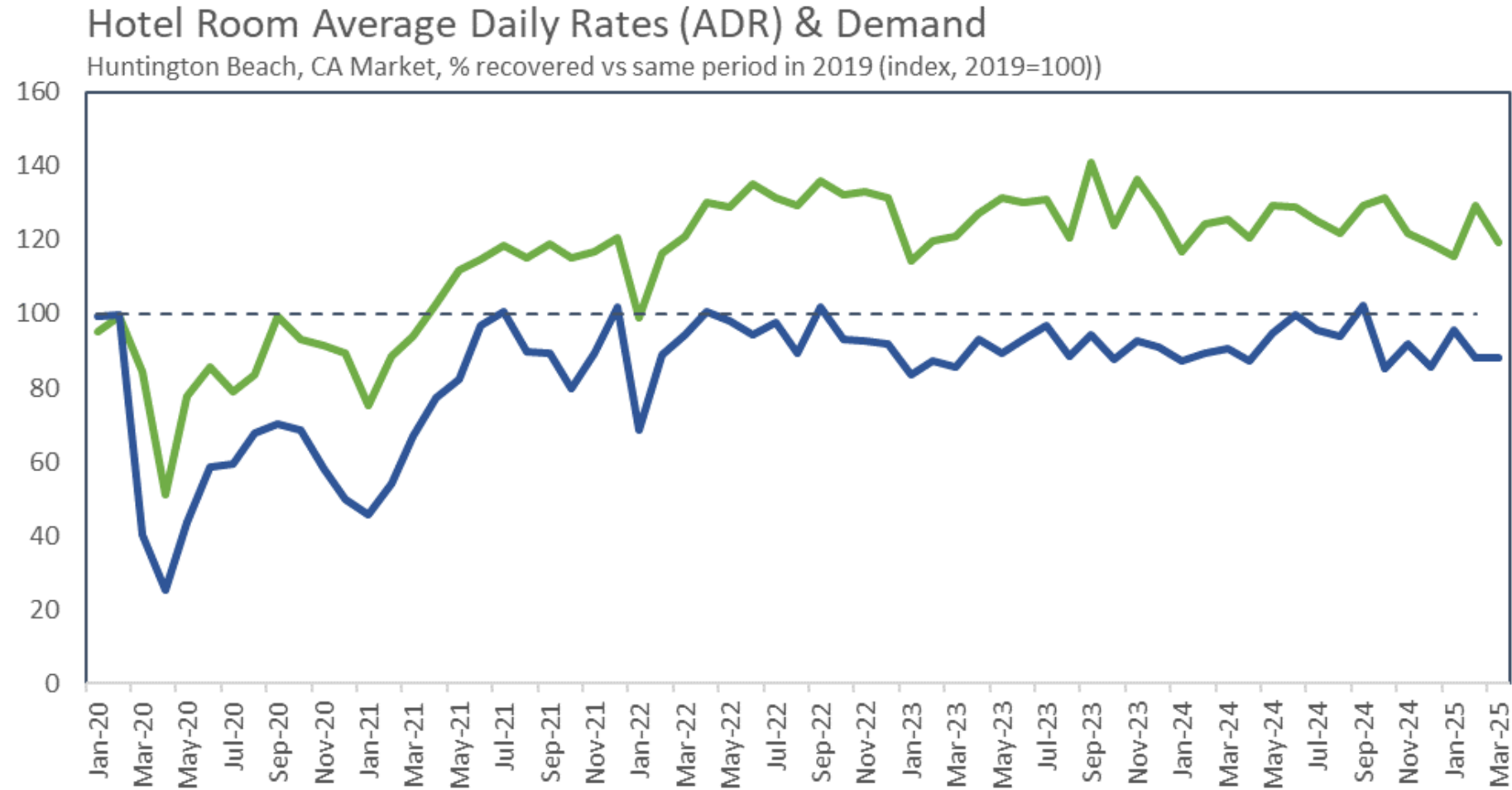
Source: TSA

CBP data show a steep slide for LAX

Inbound screened passengers at LAX (Interntaional Terminal)
Percent change in average pax over 28 days vs same 28 days last year



Hotel Demand trends are leveling, while rates hold



Competitive markets trending similarly this quarter

Year-over-Year % Change in Demand

	Huntington Beach, CA	Dana Point, CA	Laguna Beach, CA	Monterey, CA	Newport Beach, CA	Santa Monica, CA
Oct-24	-3.2%	8.6%	-12.7%	2.7%	2.3%	1.4%
Nov-24	-1.1%	6.9%	-14.4%	1.6%	1.0%	2.2%
Dec-24	-5.6%	-0.2%	-14.1%	3.3%	-1.2%	1.5%
Jan-25	9.5%	-1.3%	6.3%	20.5%	12.4%	-5.9%
Feb-25	-1.1%	4.8%	2.3%	3.3%	7.0%	4.0%
Mar-25	-2.8%	-2.2%	-1.8%	1.9%	5.5%	-4.4%

Source: STR

While holding more rate

Year-over-Year % Change in ADR

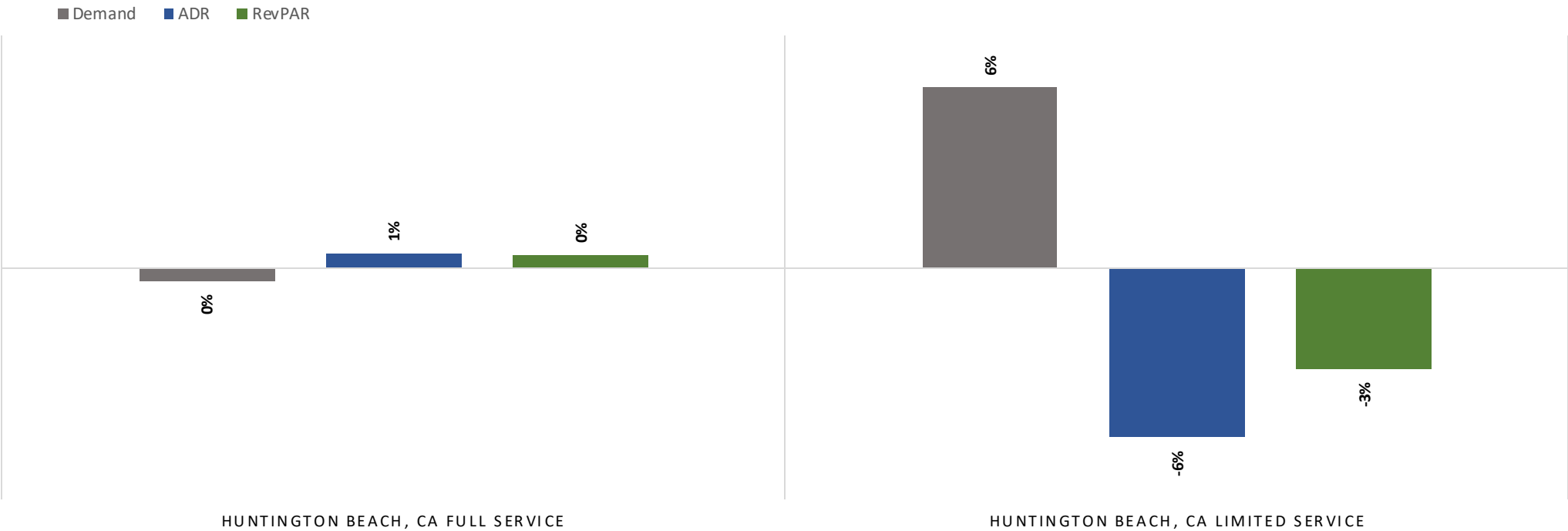
	Huntington Beach, CA	Dana Point, CA	Laguna Beach, CA	Monterey, CA	Newport Beach, CA	Santa Monica, CA
Oct-24	6.0%	-0.9%	7.1%	-3.9%	4.4%	-4.4%
Nov-24	-10.7%	-1.1%	3.2%	3.8%	0.5%	-6.1%
Dec-24	-7.4%	0.6%	7.9%	2.5%	3.3%	-0.2%
Jan-25	-1.2%	8.5%	35.8%	5.1%	12.4%	4.7%
Feb-25	4.0%	2.1%	9.7%	-2.8%	2.1%	2.0%
Mar-25	-4.8%	-10.8%	-4.6%	0.0%	-0.6%	0.4%

Source: STR

Select Service Properties affecting market ADR

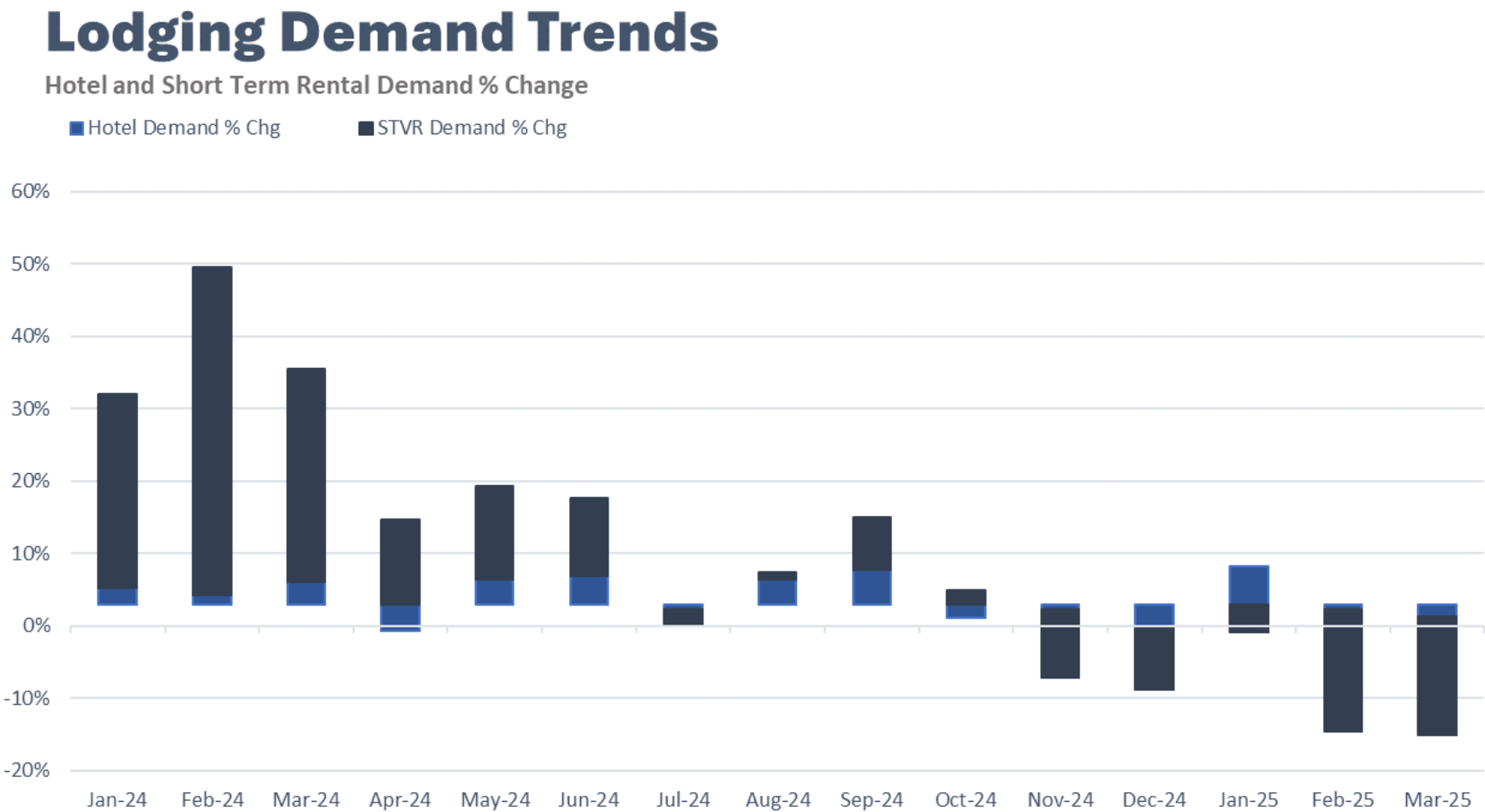
HOTEL TYPE PERFORMANCE

HUNTINGTON BEACH, CA HOTELS YTD MARCH 2025



Source: STR, Inc

Lodging Trends still increasing in STR

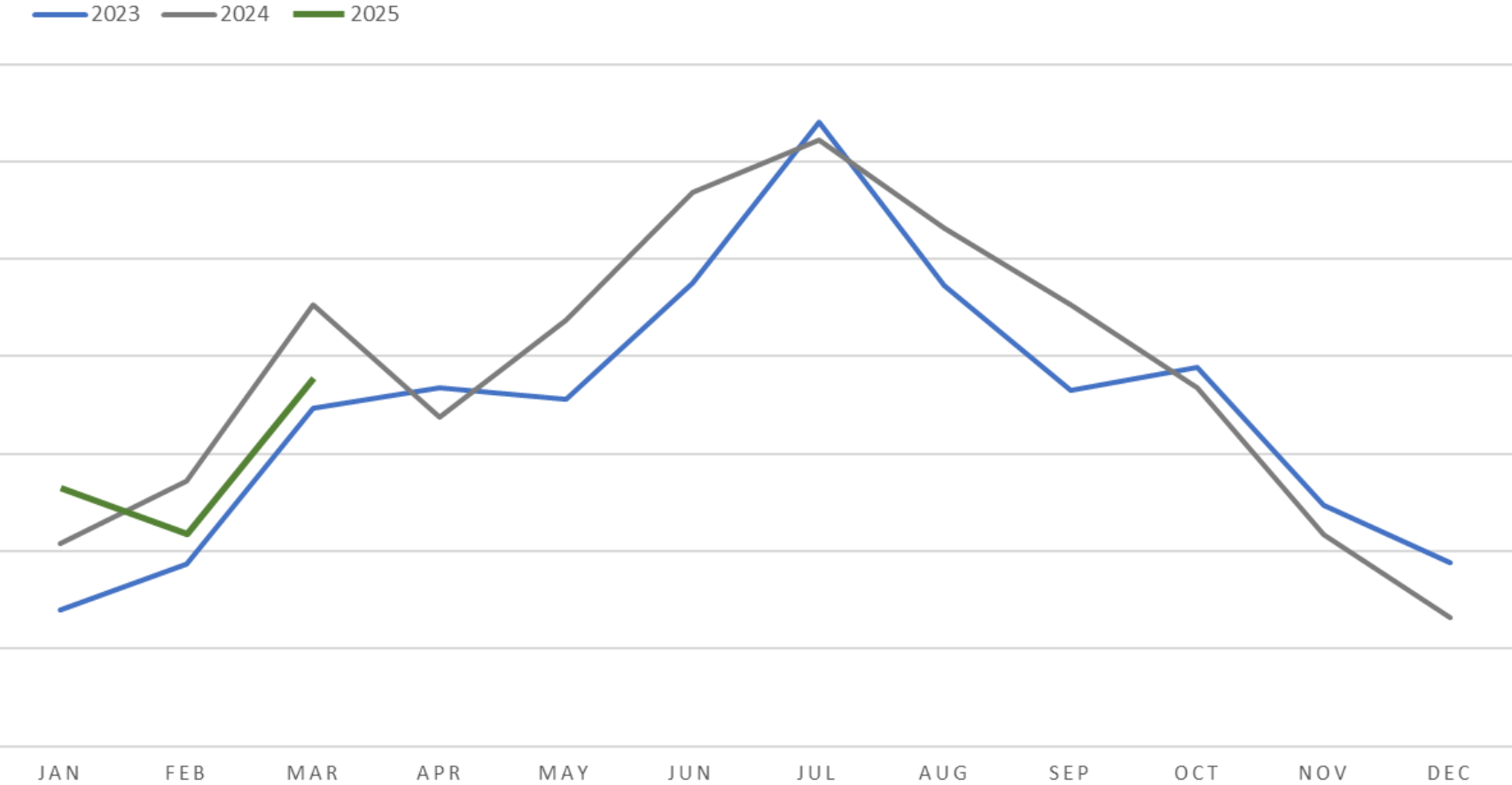


Source: STR, Inc & KeyData

Aggregated lodging demand is down

LODGING DEMAND CHANGES

HUNTINGTON BEACH AGGREGATED SHORT TERM RENTALS AND HOTEL



Hotel Demand YTD
March +1.4% vs
2024

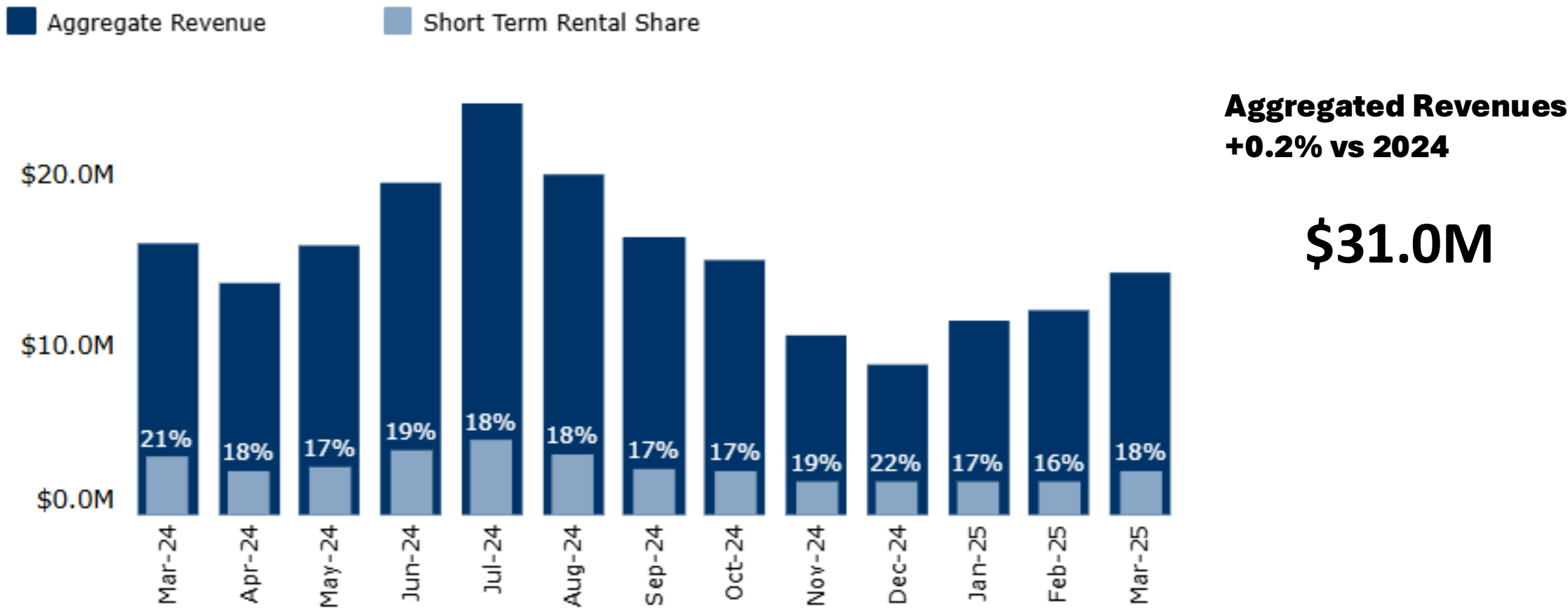
Short Term lodging
YTD March -29.6%
vs 2024

Source: STR, Inc & KeyData

Hotels make up over 80% of the lodging revenues

Lodging Revenue & Contribution

Hotels: Huntington Beach, CA; KeyData: Vacation Area - Huntington Beach



Source: STR, Inc & KeyData

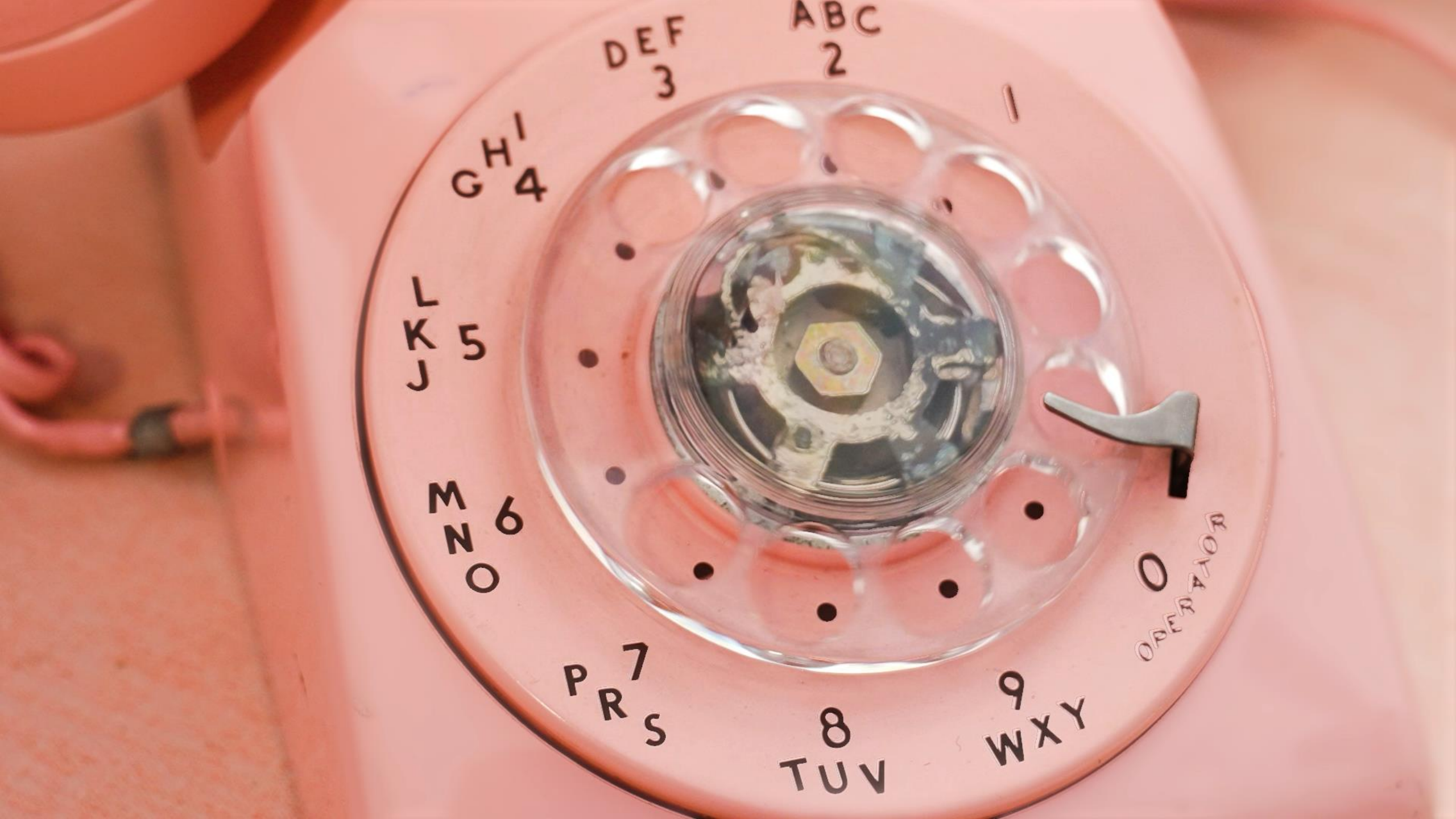
The best thing about travel?

Travel is resilient!



A photograph of the Huntington Beach Pier, a long wooden structure extending into the ocean. The pier features several buildings, including a prominent one with a red roof and a blue facade. The water is calm, and the sky is a clear blue. The entire image is framed by a decorative border with a repeating pattern of geometric and organic shapes in white and teal.

2025 HUNTINGTON BEACH TOURISM SUMMIT



ABC
2
DEF
3

GHI
4

L
K J
5

M
N O
6

P
R S
7

8
TUV

9
WXY

0
OPERATOR

The background of the image is a teal-colored silhouette of the Huntington Beach Pier and its lifeguard tower. The pier extends from the left towards the center, with many small figures of people walking on it. The lifeguard tower is a multi-story structure with a flat roof and a small antenna on top. In the foreground, there are more silhouettes of people on the beach, some standing and some sitting. The entire image is framed by a decorative border with various geometric and organic patterns in white lines.

2025 HUNTINGTON BEACH TOURISM SUMMIT

Tommy Martinez

Senior Client Partner,
Destinations





Tripadvisor

2025

Huntington Beach Tourism Summit

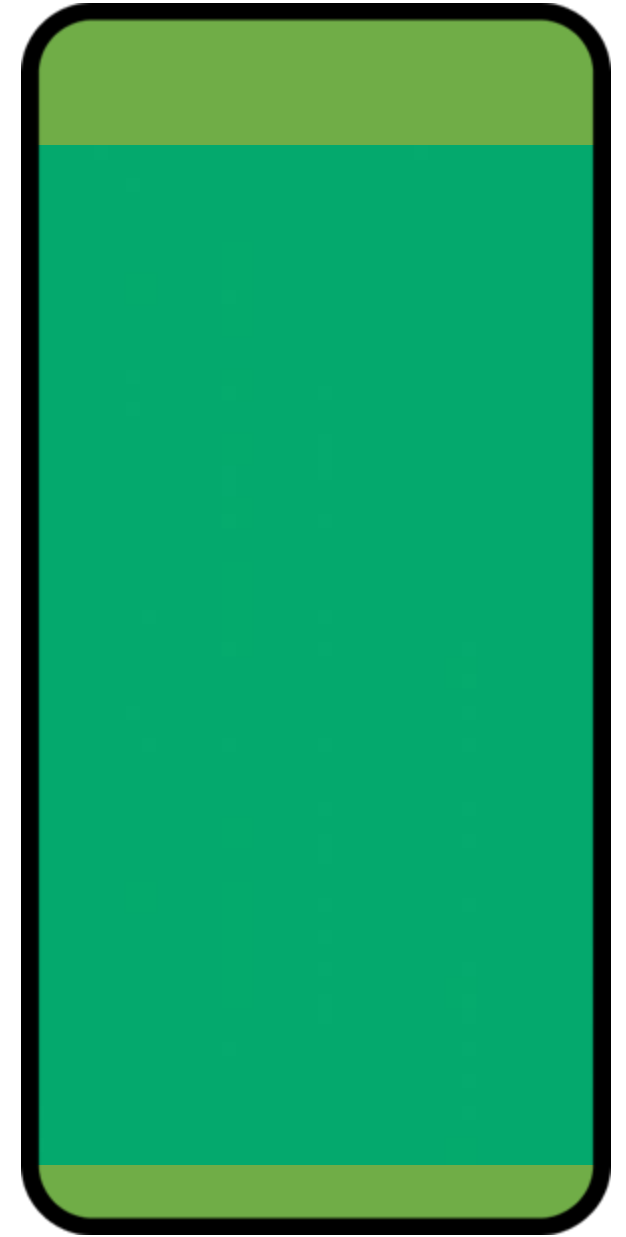
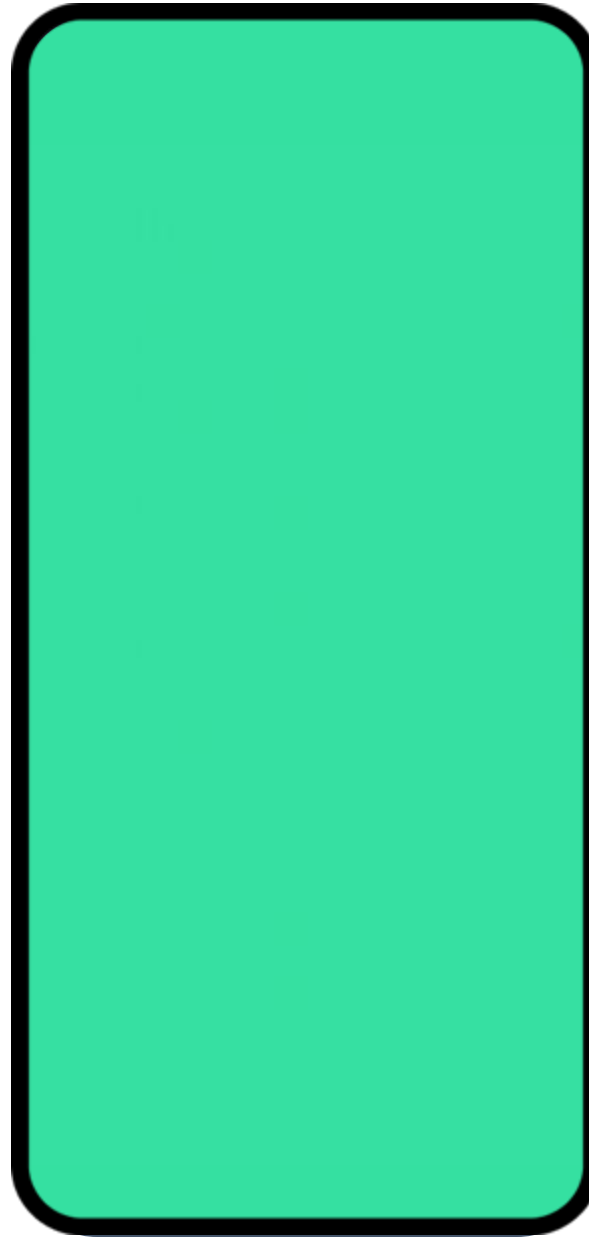


The New Generation of Travelers

Unlocking Insights of Gen Z & Millennials

2025

A new
generation
of travelers
has entered
the chat.



By 2030...

Gen Z and Millennials
are projected to
represent

48%
of global spend



These generations are
influential, powerful, and key to
growing your brand.

Together they:

drive consumer trends

are early adopters

prioritize brand authenticity

With increasing amounts of spending power, it's crucial to understand Gen Z and Millennial **preferences, behaviors, & motivations.**

Utilizing these insights, Tripadvisor can help tailor your marketing strategy to make more of an impact.



Why trust Tripadvisor?

These users make up **more than half** of our audience.

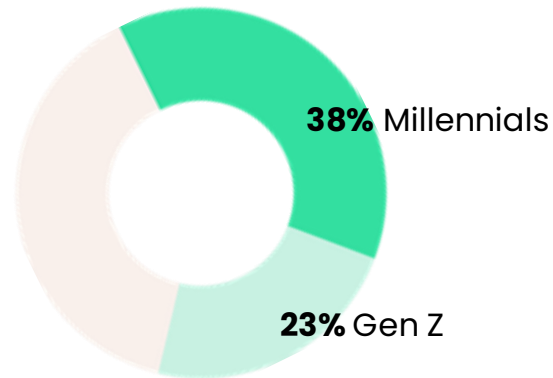
~150M

Tripadvisor Millennial and Gen Z
users guided per month



61%

of Tripadvisor users are
Gen Z or Millennials



Leveraging Tripadvisor's proprietary research, **here's what we know about them.**



Receptive & ready
to try new things



Social media
means more



Excited about new
experiences



Love to plan ahead



Environmentally
conscious



Value cultural
immersion



Prioritize their
health & wellness



Always sharing
their experiences

Tripadvisor Gen Z & Millennial travelers are...

more open to trying new products
and **receptive to brands.**

38% more likely*
to be the first to
try new things

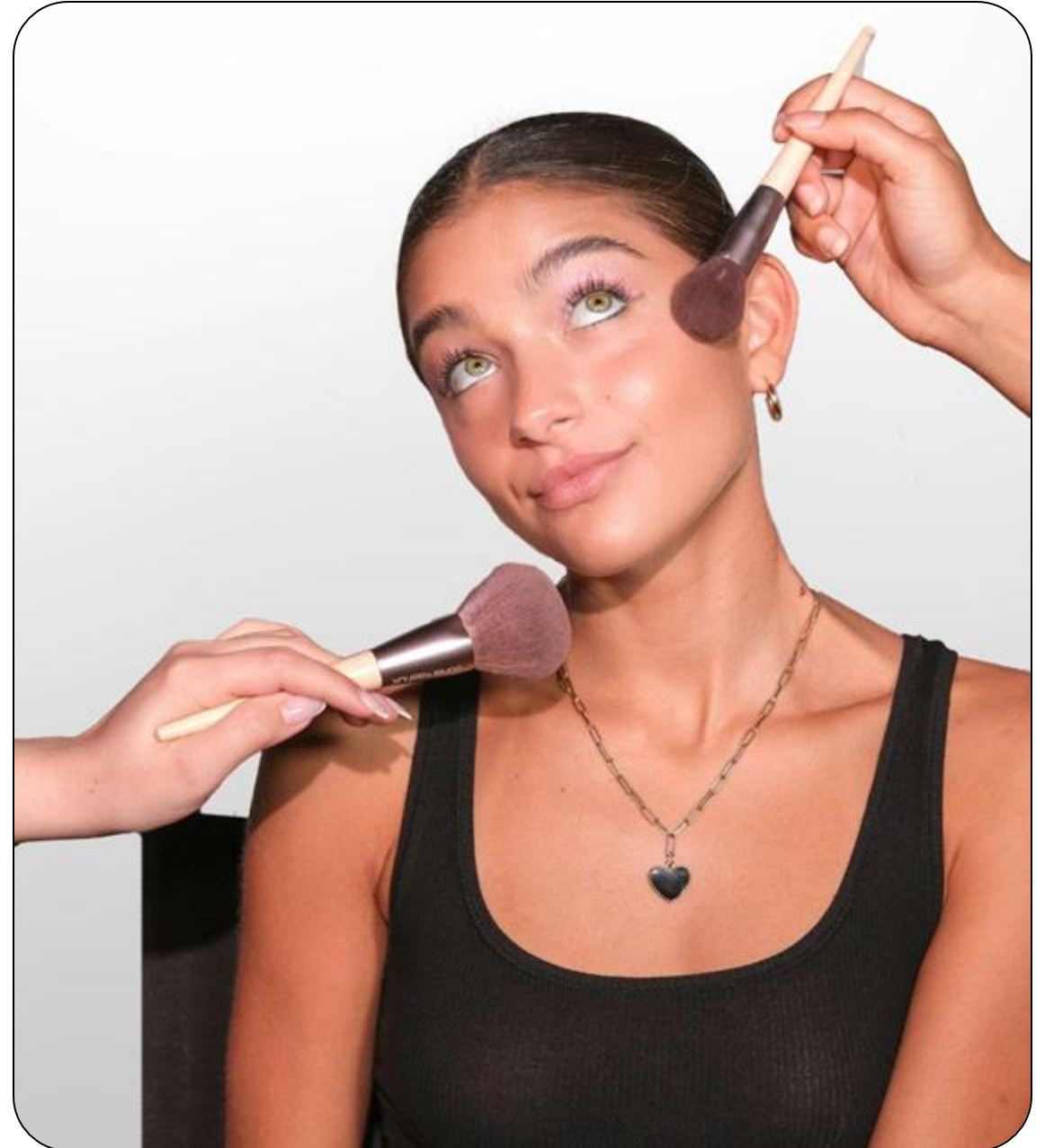
51% more likely* to
buy brands they
see advertised

**and they do their
research before they buy**

60% research a product online before
buying, **21% more likely* than the average.**

Source: GWI, Q2 2024

*than the average Gen Z and Millennial internet user



Tripadvisor Gen Z & Millennial travelers are...

more likely to use **social media** to fuel their wanderlust.

Our audience is even more social-focused than the average. They are **32% more likely*** to follow content creators or other experts on social media.

In general, Gen Z & Millennials are more likely than Boomers & Gen X...

for their destination choice to be influenced by social media (145%)

to go to social media for travel guidance (200%)

to turn to social media content creators (233%)

Source: Travel Through Life 2024; GWI, Q2 2024; Tripadvisor Winter Travel Beats Report 10/2024, N=4,850; AU, FR, JP, SG, UK, US

*than the average Gen Z and Millennial internet user



Tripadvisor Gen Z & Millennial travelers are...
even more open and excited
about **new experiences.**

20%

more likely to consider themselves
open minded

33%

more likely to be **interested in other**
cultures/countries

29%

more likely to **explore the world**



Source: GWI, Q2 2024

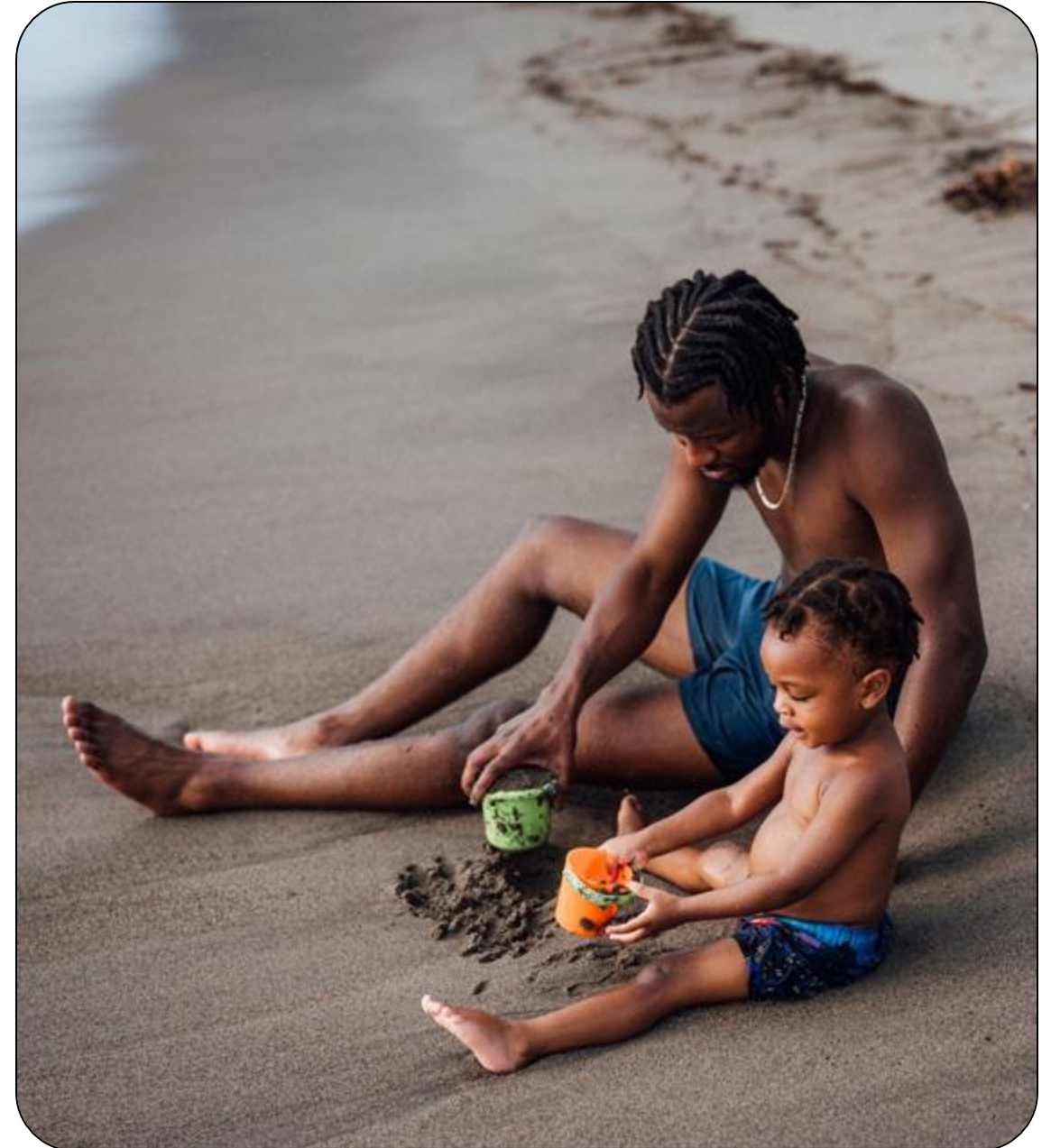
*than the average Gen Z and Millennial internet user

Tripadvisor Gen Z & Millennial travelers are...
more likely than other
generations to **plan ahead.**

60%

more likely to have **booked or plan to book any on-trip activities** in advance*

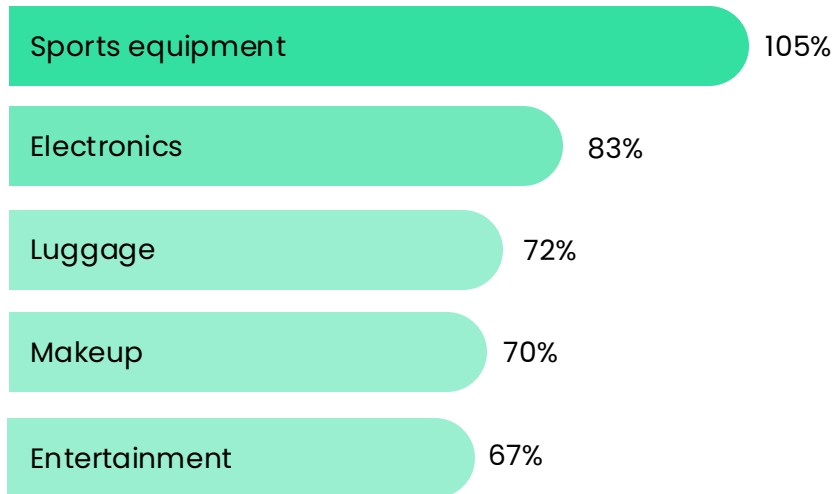
They are **twice as likely** to **book or plan to book restaurant reservations** in advance of their trip*



Source: Tripadvisor Winter Travel Beats Report 10/2024, N=4,850; AU, FR, JP, SG, UK, US
*than the older generations

Tripadvisor Gen Z & Millennial travelers are...
more likely to **make purchases** in preparation of their travel.

Thinking ahead to their travel plans over the next year, they are **more likely to purchase across all categories than older generations** (Boomers & Gen X), most notably...



What's your summer travel style?

Take the quiz for your trend-inspired packing guide

Packing for your getaway? Find which of summer's trends suit you and your destination. Take this quick quiz to see your custom Stitch Fix TSA (Travel Style Advisor) packing list, and start planning for your most fashionable summer yet.

Take the quiz



Tripadvisor Gen Z & Millennial travelers are...

more **socially & environmentally conscious** than the average.

111 INDEX

Want brands to be eco-friendly

132 INDEX

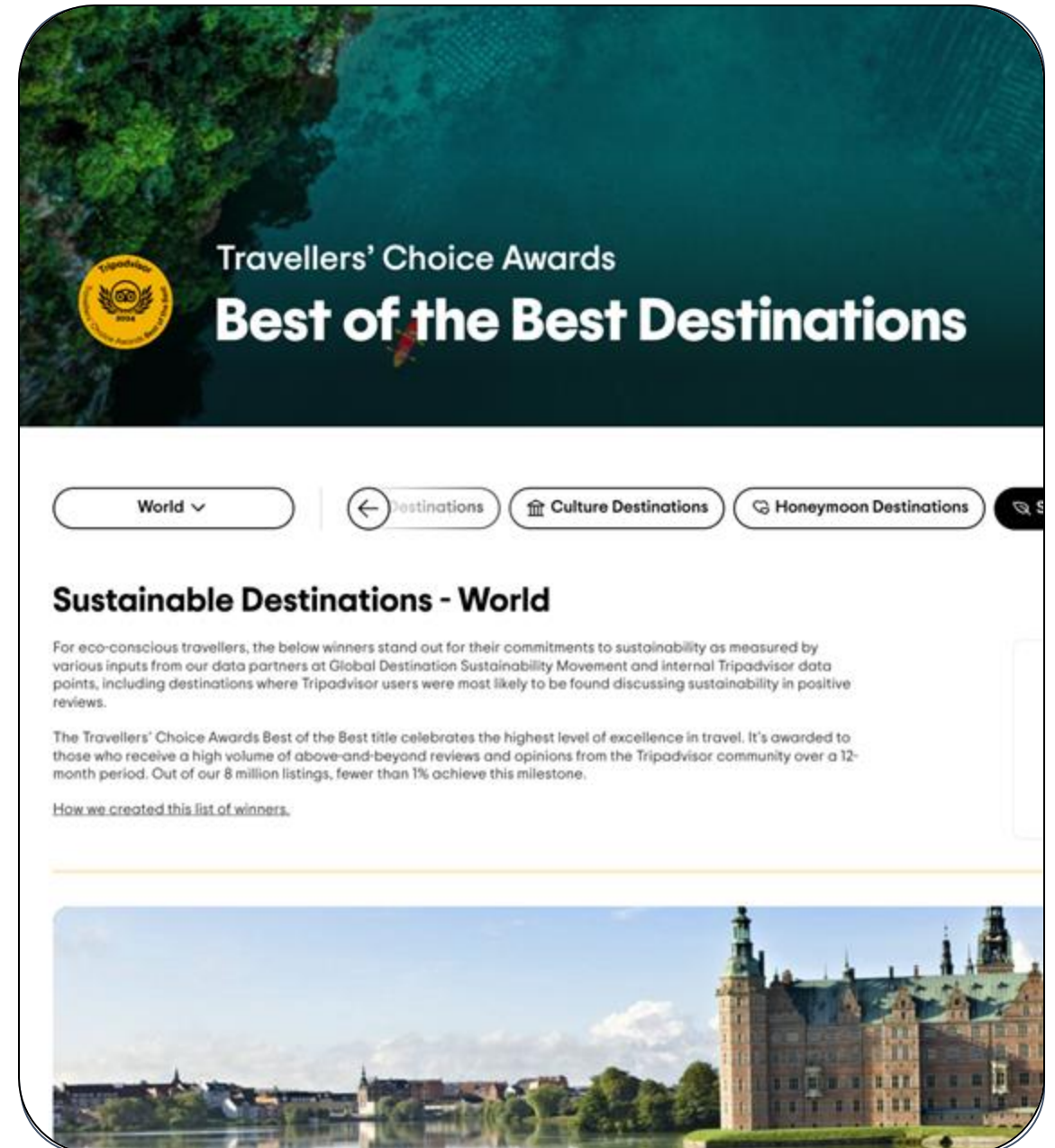
Want brands to support local suppliers

117 INDEX

Want brands to be socially responsible

183 INDEX

Buy products/services to access the community built around them



Tripadvisor Gen Z & Millennial travelers...

put more value on
experiences & seek
cultural immersion.

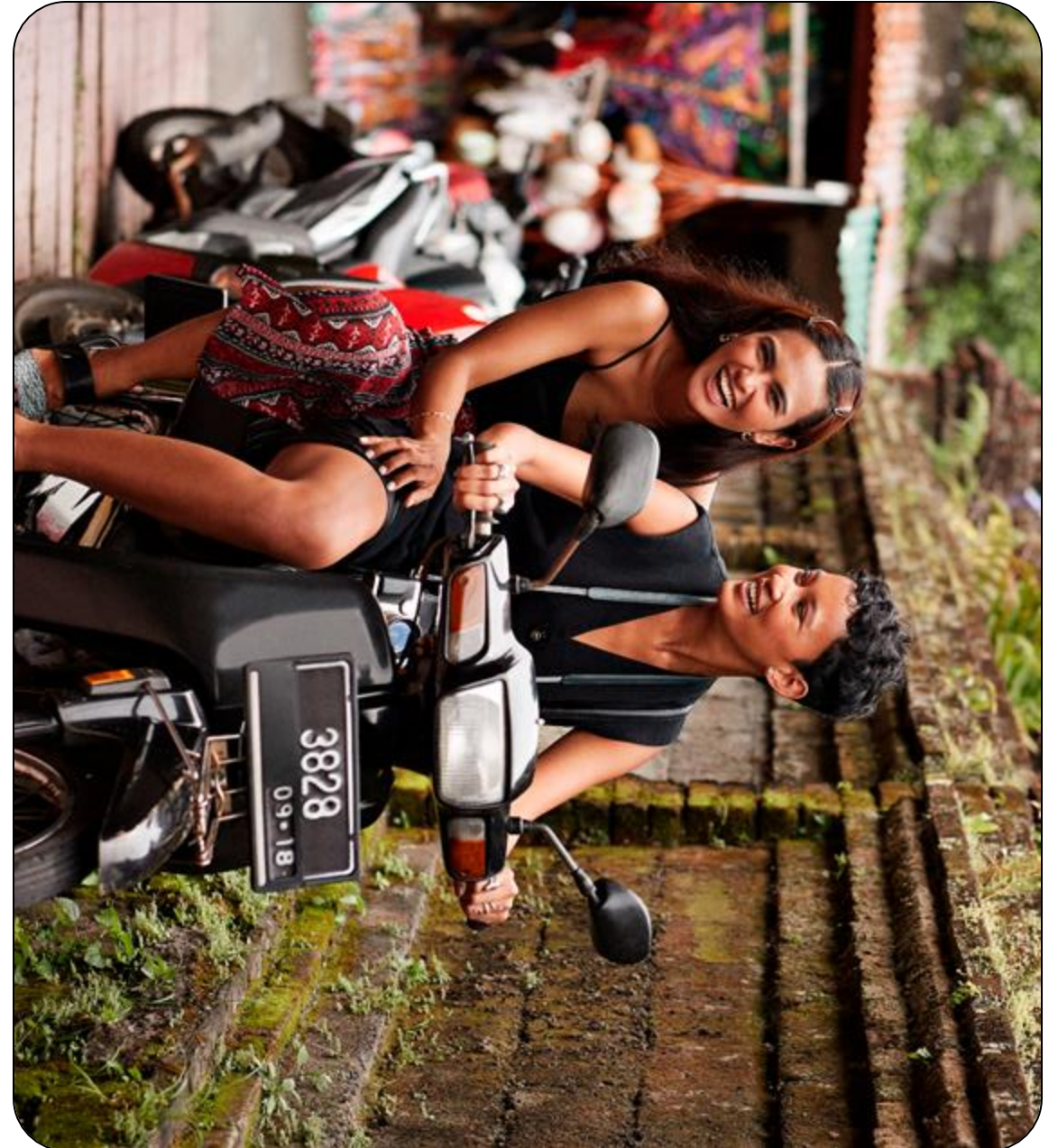
They are more inclined to spend on experiences over products compared to their generational peers. They actively seek unique, meaningful travel adventures that allow them to immerse themselves and live like a local.

84%

Prefer off-the-beaten-path destinations

79%

Say that they would love to partake in a day in the life of locals in the destination they are visiting

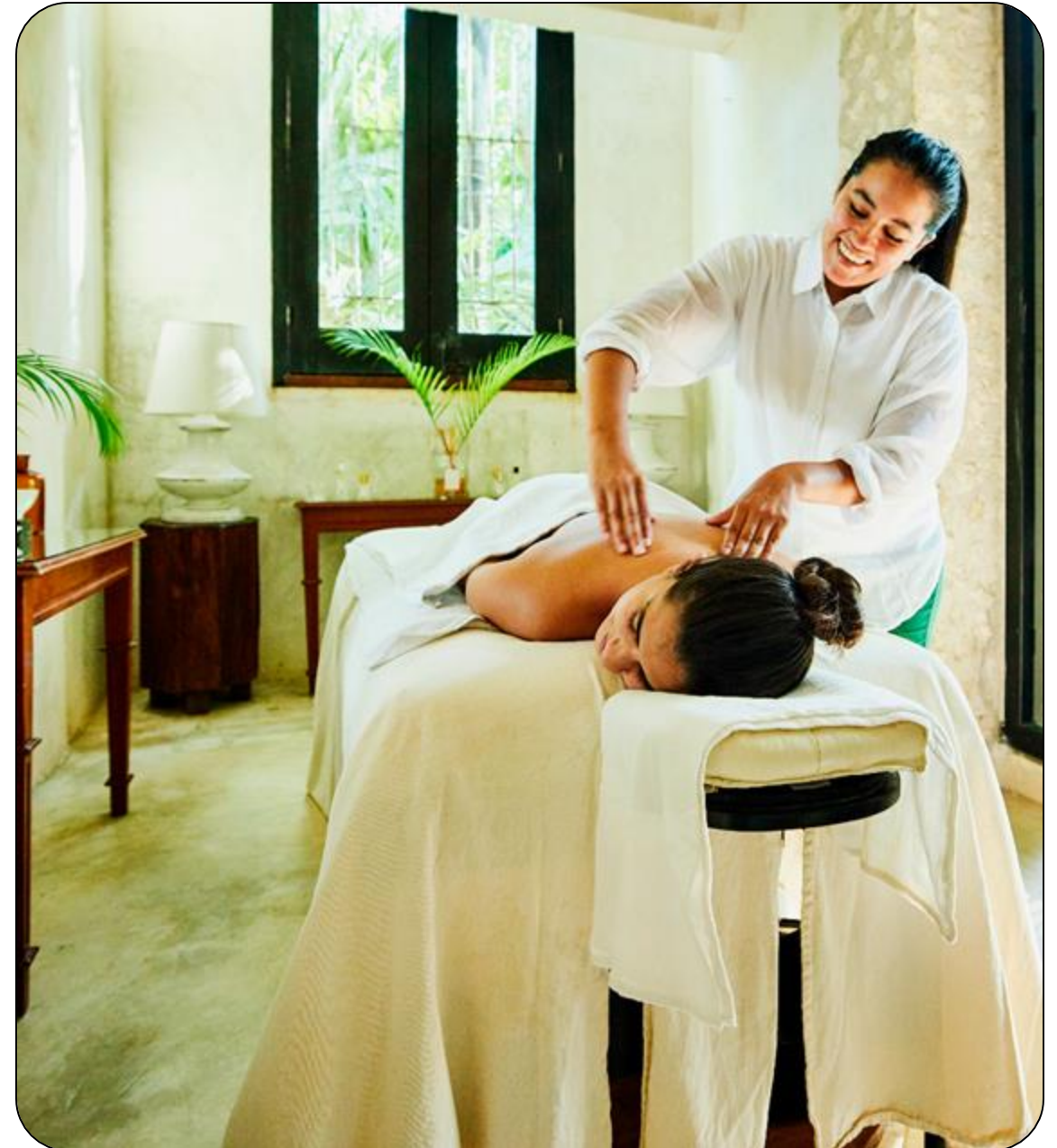


Tripadvisor Gen Z & Millennial travelers are...
more likely to prioritize
personal wellness.

50% more likely* to
enjoy spa/retreat
centric vacations

26% more likely* to be
interested in **personal**
healthcare

With self-care in mind, 61% of Gen Z and
Millennial travelers prioritize making travel
plans that focus on personal wellness.



Source: Travel Perk; GWI, Q2 2024

*than the average Gen Z and Millennial internet user

Tripadvisor Gen Z & Millennial travelers are...
more likely to **share their experiences.**

72%

more likely* to **have written a review of a product/service online** in the last week

24%

more likely* to cite **sharing their opinion** as an important reason for using the internet

38%

more likely* to **tell friends and family about new products**



Source: GWI Q2 2024, Global

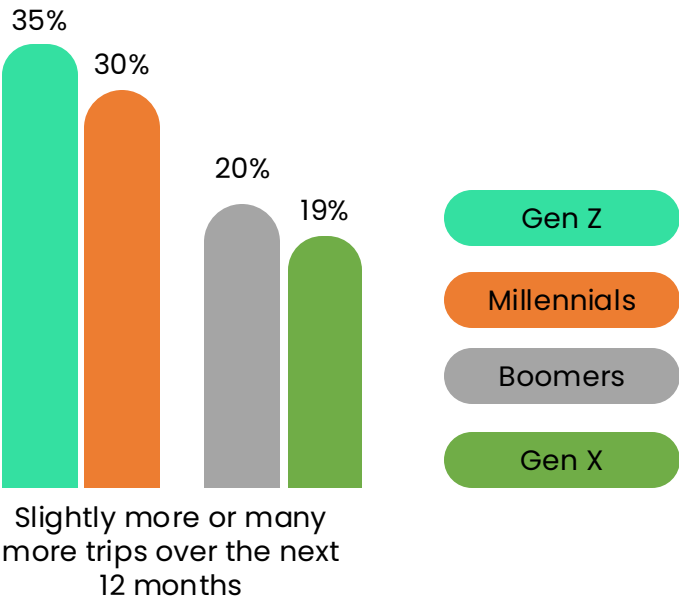
*than the average Gen Z and Millennial internet user

A photograph of a courtyard with a swimming pool, lounge chairs, and a couple sitting on a bench, with text overlay.

When targeting the
Gen Z & Millennial travelers
specifically, here are some things
to keep in mind...

They **travel more than other generations**

Expects to take more trips this year than last year



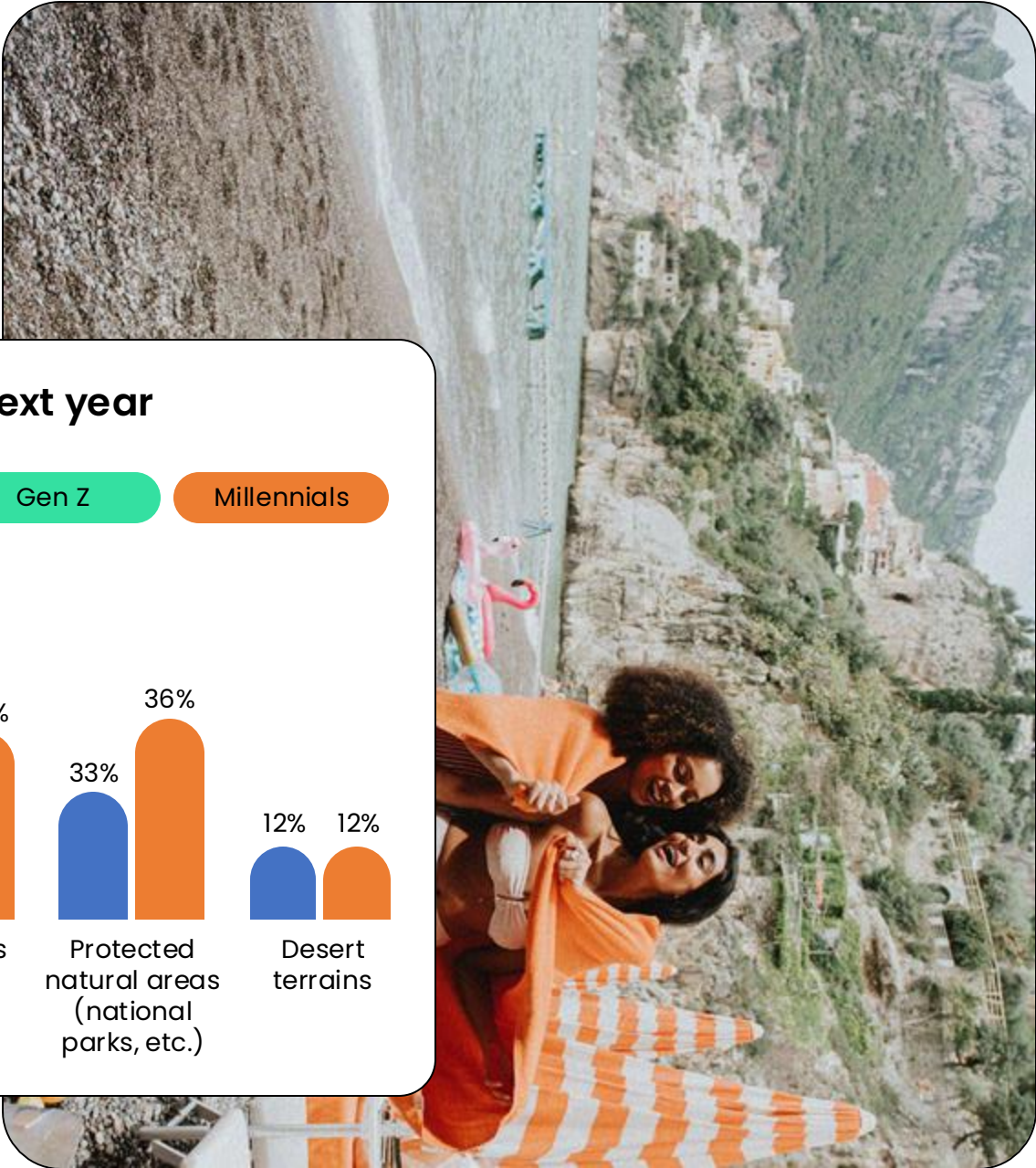
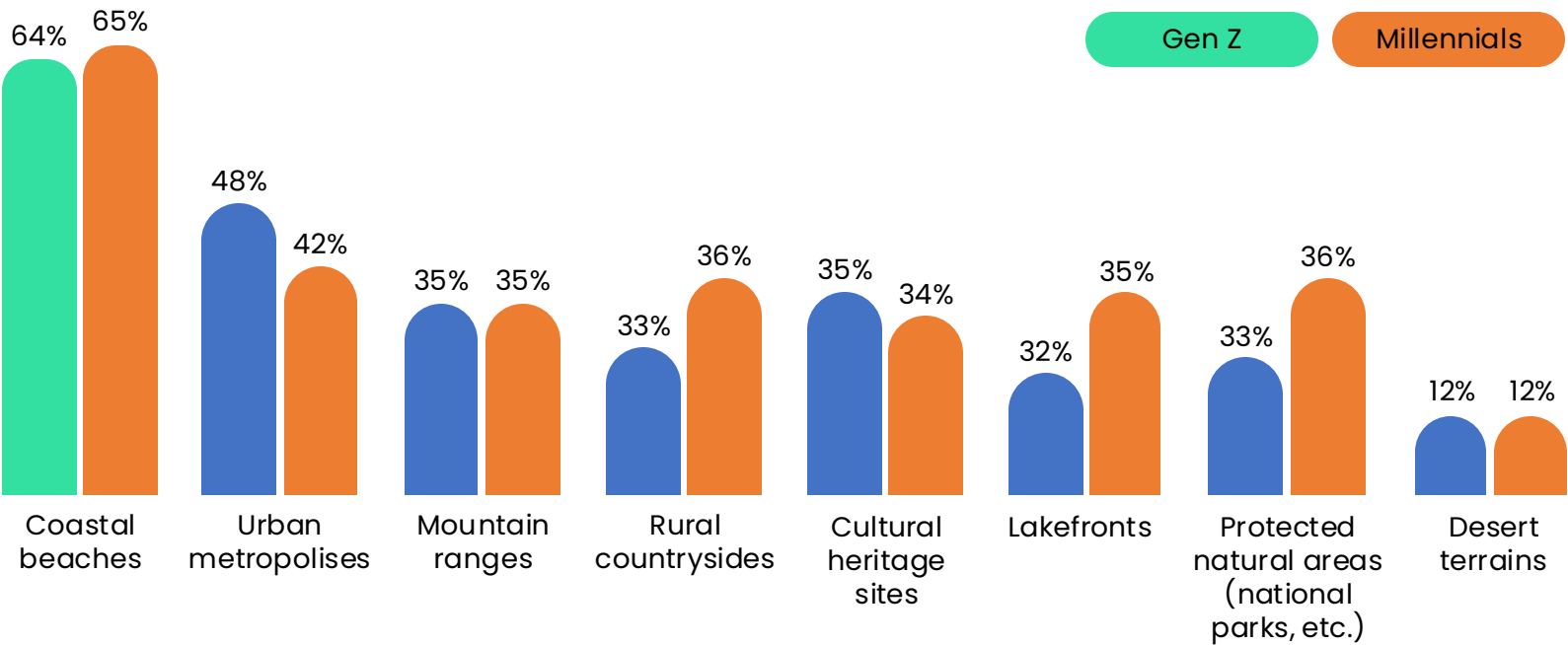
Gen Z are 77% more likely than Boomers and Gen X

Millennials are 50% more likely than Boomers and Gen X



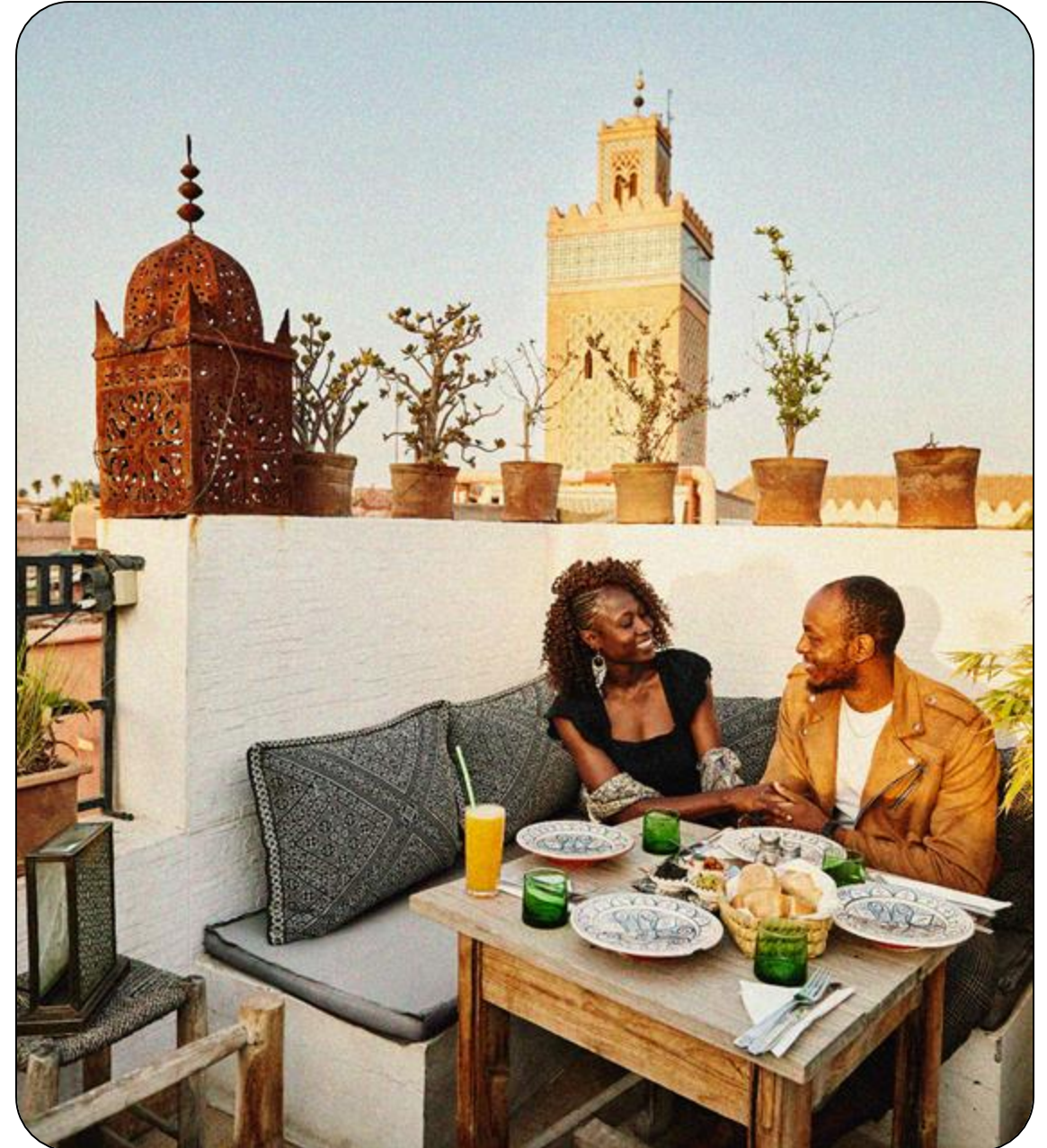
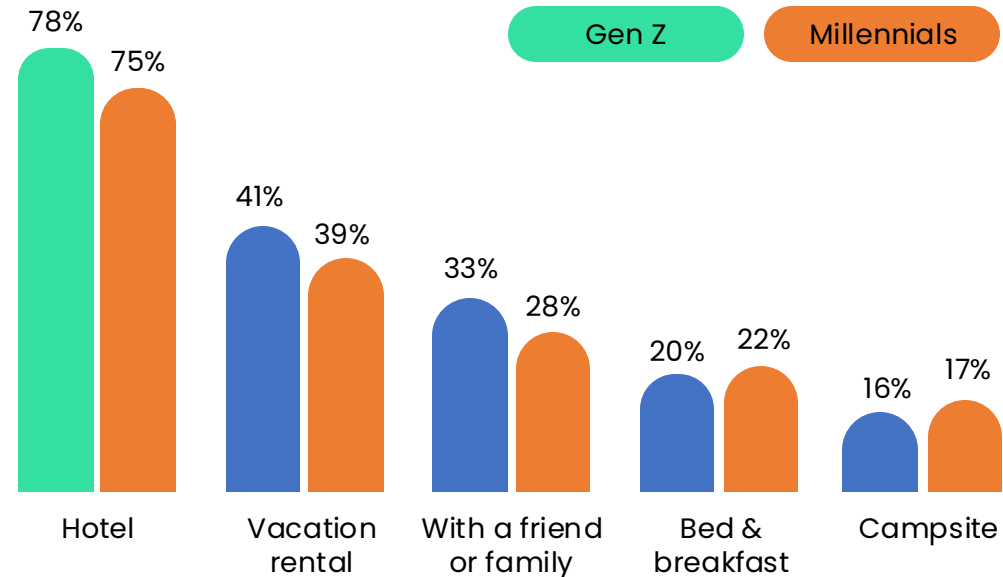
They prefer **beaches** **and urban** destinations

Ideal vacation spots for Gen Z and Millennials in the next year



Gen Z and Millennials **prefer hotels over other accommodations**

Where will you stay on your trips in the next year?



Pre-trip

On-trip / Post trip

How these generations **differentiate** themselves across the **travel journey**

Dreaming

It's all about the visuals.

61%

agree that a top motivation for traveling in 2023 was to visit a destination because it looks great in photos/videos – **25%** more than older generations.

Planning

Activities are top of mind.

~50%

of Gen Z and Millennials are planning 3-5 activities for their next trip.

Booking

More likely to book or plan to book in advance.

60%

more likely to book **on-trip activities** in advance of their trip (67% vs 42% older age groups)

Twice as likely to book **restaurants** in advance of their trip (50% vs 25% older age groups)

Experiencing

Immerse themselves in culture and splurge on experiences.

94%

more likely to splurge on in-destination paid activities.

69% more likely than older generations to splurge on events & **79%** would love to partake in a day in the life of locals.

Sharing

Unafraid to inspire FOMO.

79%

say they love to post digital content about their travels on social media.

165% more likely to always or often share their travel experiences on social media compared to older generations.



These generations are **redefining the travel landscape.**

Focused on authenticity, sustainability, and personalization in their experiences, Gen Z and Millennials are influencing and reshaping how the industry markets destinations, products, & services.



Tripadvisor's Gen Z & Millennial audience amplifies these consumer-centric behaviors, making our platform **the perfect place to connect with them.**





Thanks!



125



The background image shows a lifeguard stand on a beach. A lifeguard is sitting inside the stand, looking out towards the ocean. The stand is elevated and has a canopy. The beach is sandy, and there are palm trees in the background. The entire image is framed by a decorative border with various patterns, including waves, flowers, and geometric shapes. The text is overlaid in the center of the image.

2025 HUNTINGTON BEACH TOURISM SUMMIT



CELEBRATING 120 YEARS

1904

2024

OF BUSINESS ADVOCACY, CONNECTION, AND SUPPORT

HUNTINGTON BEACH
Chamber of Commerce

The background of the image is a photograph of the Huntington Beach Pier, a long wooden structure extending from the beach into the ocean. The pier has several buildings and a lifeguard stand. The beach is sandy with some palm trees in the foreground. The entire image is overlaid with a semi-transparent teal color. A decorative white Art Deco border frames the image, featuring various geometric and organic patterns like waves, stars, and floral motifs.

2025 HUNTINGTON BEACH TOURISM SUMMIT

Coach Karch Kiraly

Head Coach, U.S. Men's
National Volleyball Team



The background is a teal-tinted photograph of a beach scene. In the foreground, several people are sitting or standing on the sand. In the middle ground, a wooden pier extends into the water, featuring a large pavilion with a peaked roof and several tall, thin light poles. The sky is hazy. The entire image is framed by a decorative border with a repeating pattern of geometric and organic shapes, including circles, waves, and stylized figures.

Q&A WITH KELLY MILLER AND COACH KARCH KIRALY















An aerial photograph of Huntington Beach, California, featuring the iconic Pacific Coast Tower in the center. The image is framed by a decorative border with a teal top and bottom section and orange side sections, all containing white geometric and nature-inspired patterns. The text "2025 HUNTINGTON BEACH TOURISM SUMMIT" is overlaid in large, bold, white capital letters.

2025 HUNTINGTON BEACH TOURISM SUMMIT



The background of the image is a teal-colored photograph of the Huntington Beach Pier and its lifeguard tower. The pier is a long wooden structure extending into the ocean, with many people walking on it. The lifeguard tower is a multi-story building with a flat roof and a small antenna on top. The sky is a clear, light blue. The entire image is framed by a decorative border with a repeating pattern of geometric and organic shapes, including circles, squares, and stylized waves. The text "2025 HUNTINGTON BEACH TOURISM SUMMIT" is overlaid in the center of the image in a large, bold, white sans-serif font.

2025 HUNTINGTON BEACH TOURISM SUMMIT

Nicole Llido

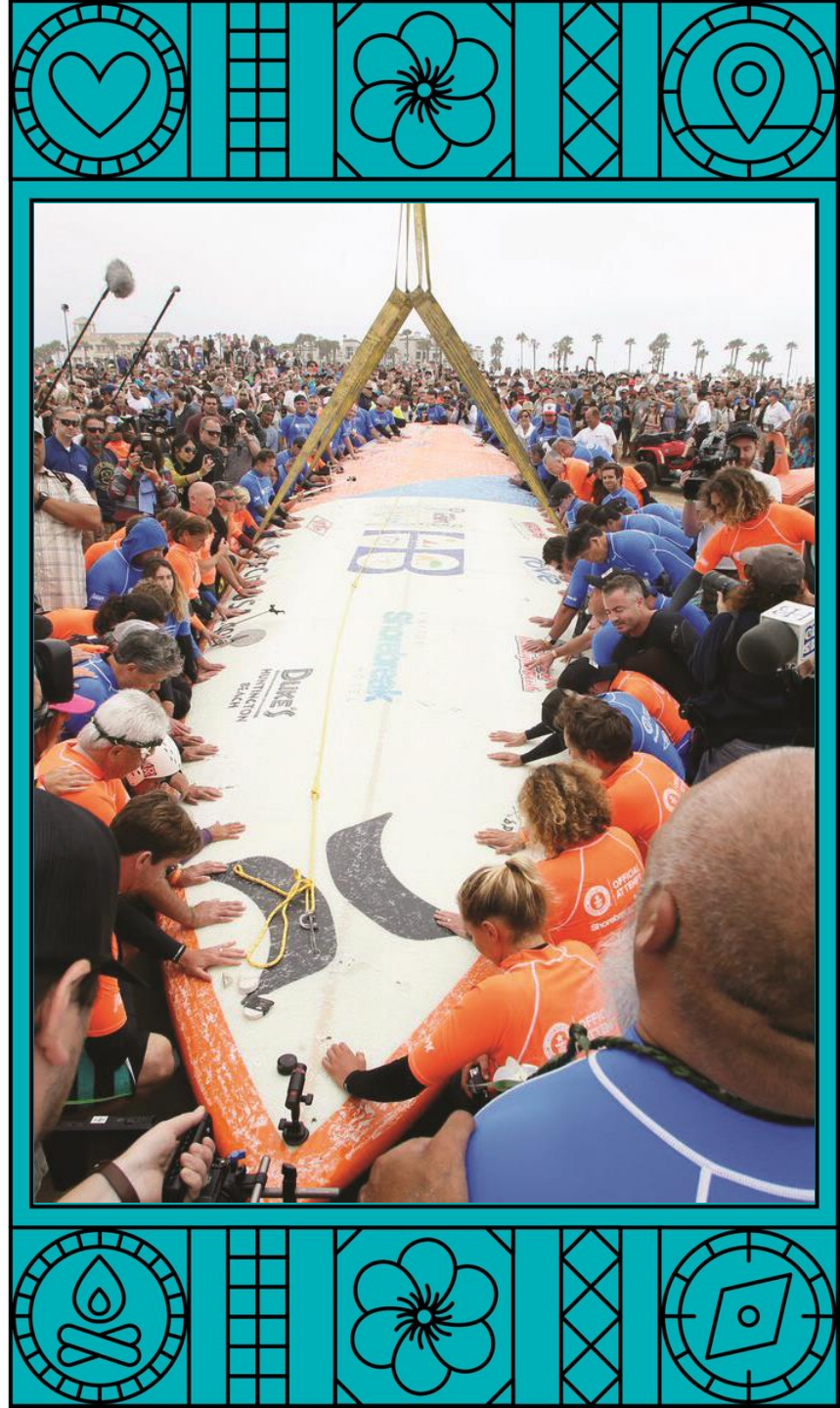
IOM, CTA

Vice President of
Administration &
Community Engagement,
Visit Huntington Beach



SURF CITY USA® INDUSTRY LEADER AWARD

The Surf City USA® Industry Leader Award recognizes a leader at a visitor-serving business who has made a meaningful impact on the Huntington Beach visitor industry.



SURF CITY USA® INDUSTRY LEADER AWARD

- **Hayley Barg**, Culture & Engagement Manager at The Waterfront Beach Resort
- **Victoria Davis**, General Manager at HB Limo Services
- **Matthew Shipp**, Assistant Director of Food & Beverage at the Hyatt Regency Huntington Beach Resort & Spa



**SURF CITY USA® INDUSTRY
LEADER AWARD WINNER**

Hayley Barg

Culture & Engagement Manager at
The Waterfront Beach Resort

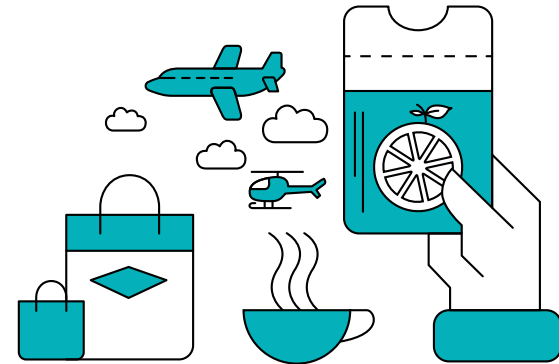


The background of the image is a photograph of the Huntington Beach Pier, a long wooden structure extending from a sandy beach into the ocean. The pier features a lifeguard tower and a building at its end. The beach is wide and sandy, with some palm trees visible in the foreground. The sky is a clear, pale blue. The entire image is framed by a decorative border with a repeating pattern of geometric and organic shapes in white and teal. The text "2025 HUNTINGTON BEACH TOURISM SUMMIT" is overlaid in the center in a large, bold, white sans-serif font.

2025 HUNTINGTON BEACH TOURISM SUMMIT

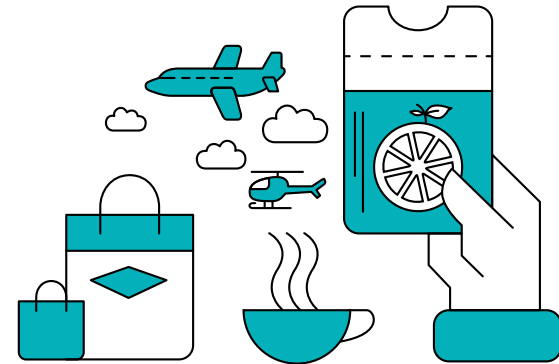
VISION IN

VHB is an effective leader representing the combined visitor industry and community partnership in the brand development, marketing and sales of the Surf City USA® experience.



VISION OUT

**A welcoming, beach-infused community that
inspires the stoke of optimism in every
resident and visitor.**



THANK YOU!

Please join us outside to
enjoy a coastal reception!

