January 30, 2019
Opening Remarks
Paul Ouimet
DestinationNEXT

Vision:
Provide destination organizations with a powerful assessment tool and practical actions and strategies for sustainable success in a dramatically changing world

Futures Study
- 75 trends & 55 strategies
- 433 respondents in 52 countries

Scenario Model & Assessment Tool
- 4 unique scenarios
- 183 detailed assessments in 11 countries
Scenario Model
Scenario Model

- **Strong Community Engagement**
- **Weak Community Engagement**

- **Developing Destination**
  - **VOYAGERS**
  - **EXPLORERS**

- **Established Destination**
  - **TRAILBLAZERS**
  - **MOUNTAINEERS**
Destination Strength Variables

- International Readiness
- Brand
- Accommodation
- Attractions and Entertainment
- Conventions & Meeting Facilities
- Air Access
- Events
- Sporting and Recreation Facilities
- Communication & Internet Infrastructure
- Mobility and Access
Community Support & Engagement Variables

Effective DMO Governance Model
Membership Strength & Support
Industry Support
Local Community Support
Policy and Regulatory Environment
Workforce
Hospitality Culture
Regional Cooperation
Funding Support & Certainty
Economic Development
Destination Assessments

350 destinations from 18 countries

183 detailed assessments completed in 11 countries

30 underway or planned, including 4 other countries

70 in discussion, including 14 other countries

- USA, Canada, Mexico, Switzerland, Colombia, Korea, Guatemala, Taiwan, Denmark, Brazil, Australia
- Dominican Republic, El Salvador, Ecuador, South Africa
- Peru, Argentina, Dubai, Germany, Honduras, Chile, New Zealand, United Kingdom, Thailand, Micronesia, Philippines, Russia, Ghana, Nigeria
* States shaded for state-wide assessment
Regional Assessments

Northwest Florida Tourism Coalition

Inspiring new ways
Online Assessments:

**Stakeholder Survey**
- Local business & community leaders
- 101 responses

**Public Survey**
- Residents
- 306 responses
Online Diagnostic Tool Results: Stakeholders

Huntington Beach, CA

January 30, 2019
101 Participants

- Community Leaders: 31%
- DMO Management Team: 17%
- DMO Board of Directors: 6%
- Customers: 9%
- Tourism Stakeholders: 37%
Age Demographic

- 50 - 64: 49%
- 35 - 49: 27%
- 18 - 34: 11%
- Over 65: 13%
Huntington Beach, CA Overall Assessment – United States

Strong Community Engagement

United States Average

Developing Destinations

Established Destinations

Weak Community Engagement

Voyagers

Trailblazers

Explorers

Mountaineers

Huntington Beach Average
Trailblazers

These DMO’s and destinations realize the benefits of their tourism vision and work to keep the community and marketplace engagement fresh and relevant.

Key Strategic Challenges

- Avoiding complacency
- Continuing to evolve the destination that delivers a compelling and authentic marketplace experience
- Keeping your eye on the ball
Huntington Beach, CA Overall Assessment – Age Group

- **Strong Community Engagement**
  - Voyagers
  - Explorers
  - Trailblazers
  - Mountaineers

- Age Groups:
  - 18 - 34
  - 35 - 49
  - 50 - 64
  - Over 65

- Developing Destinations
- Established Destinations
Destination Strength Rankings – Global Averages

- Attractions & Entertainment: 1\textsuperscript{st}
- Accommodation: 2\textsuperscript{nd}
- Brand: 3\textsuperscript{rd}
- Mobility & Access: 4\textsuperscript{th}
Mobility & Access

• Road infrastructure
• Public transportation
• Accessibility/experience for those with disabilities
Convention & Meeting Facilities

• Necessary convention and meeting space to compete in the long-term
• Unique, off-site venues for special events
Air Access

- Airport “sense of place”
- International air access (number of flights and capacity)
- Domestic air access (number of carriers and low-cost options)
## Destination Strength Rankings – Huntington Beach, CA

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<thead>
<tr>
<th></th>
<th>Relative Importance</th>
<th>Perceived Performance</th>
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</table>
## Destination Strength – Report Card

<table>
<thead>
<tr>
<th>Variable</th>
<th>Relative Importance (0-100%)</th>
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<tr>
<td></td>
<td>Industry Average</td>
<td>Huntington Beach Average</td>
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<td>Brand</td>
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<tr>
<td>Accommodation</td>
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<td>9.1%</td>
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<tr>
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<td>Events</td>
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<tr>
<td>Outdoor Recreation &amp; Sports Facilities</td>
<td>9.5%</td>
<td>9.2%</td>
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**DESTINATION STRENGTH - Huntington Beach** 3.66

**INDUSTRY AVERAGE DESTINATION STRENGTH** 3.36

**RESULTING SCENARIO** TRAILBLAZERS

**Note**

Green shading signifies that the destination outperformed the industry average by greater than 0.2.

Yellow shading signifies that the destination underperformed the industry average by greater than 0.2 but less than 0.4.

Red shading signifies that the destination underperformed the industry average by greater than 0.4.
## Destination Strength - Stakeholder Report Card

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<tr>
<th>Variable</th>
<th>Huntington Beach Average</th>
<th>DMO Management Team</th>
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**DESTINATION STRENGTH - Huntington Beach**

**INDUSTRY AVERAGE DESTINATION STRENGTH**

**RESULTING SCENARIO**

**TRAILBLAZERS**

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**Note**

Greenshading signifies that the stakeholder group outperformed the destination average by greater than 0.2.

Yellow shading signifies that the stakeholder group underperformed the destination average by greater than 0.2 but less than 0.4.

Red shading signifies that the stakeholder group underperformed the destination average by greater than 0.4.
Main iconic image is the beach and pier

Is known as being healthy and an outdoor, active city

Has an established brand that is simple, memorable and market-tested

Tourism industry leverages social media/press coverage to support the brand

Appeals to a wide range of visitors

Is known for having a lot of things to see and do

Is known for being an environmentally conscious and sustainable destination

Is known for being safe, clean and secure for visitors

Is known as an innovative destination
Accommodation

- Hotels are performing well
- Has adequate accommodations capacity
- Location and proximity of accommodation options meets visitor needs
- Sufficient number of large, headquarter hotels to meet demand
- Offers a diversity of accommodation price options with the presence of well-known hotels
Attractioins & Entertainment

- The beach and pier, supports the destination’s brand
- Unique and high-quality dining options
- Has an assortment of authentic and unique attractions and entertainment opportunities
- Shopping areas like Pacific City and Bella Terra, supports the destination’s brand
- Offers diverse and high-quality shopping opportunities
- Large, famous attractions that cause people to stay (or plan to stay) an extra day
- Unique and vibrant neighborhoods that are attractive and accommodating to visitors
- Downtown Huntington beach/ Main Street, supports the destination’s brand
- High-quality and wide-ranging arts and cultural attractions
- Adequate historical and cultural tours available to visitors and residents
Air Access

- SNA offers a true destination “sense of place” that supports the brand
- Offers a wide variety of domestic air access (e.g. number of carriers and low-cost options)
- Offers variety and quality domestic air access (e.g. number of flights, schedule, and capacity)
- SNA is a state-of-the-art facility with capacity to grow
- LGB is a state-of-the-art facility with capacity to grow
- LGB offers a true destination “sense of place” that supports the brand
- LAX is a state-of-the-art facility with capacity to grow
- Offers variety and quality international air access (e.g. number of flights, schedule, and capacity)
- Offers a wide variety of international air access (e.g. number of carriers and low-cost options)
- LAX offers a true destination “sense of place” that supports the brand
International Readiness

- Restaurants have to ability to serve visitors with diverse culinary requirements
- Has adequate front-line training for international visitors
- Can accommodate the diverse language requirements of foreign visitors
- Has available multi-lingual travel guides
- Has adequate money exchanges
- Has multi-language street signage and wayfinding capabilities
Events

- Has an abundance of parks and outdoor spaces for handling special events
- Offers a year-long series of major events that attract visitors and drive economic impact
- Diverse and quality facilities/venues with capacity and availability to host major events
- Government is cooperative and supportive in attracting and hosting major events
- Citizens are supportive of hosting major sporting/national or international events
Mobility & Access

- Adequate pedestrian-friendly infrastructure including crosswalks, lighting, pedestrian wayfinding, etc.
- Known as a walkable destination
- Provides good access and mobility for those with disabilities
- Is a bicycle-friendly city with easy, well-marked bike routes throughout
- Has great directional signage and highways that make it easy to get around
- Has adequate public transportation that makes it easy for visitors to get around
Convention & Meeting Facilities

- Hotels and other meeting venues take full advantage of the views that are available here
- Successfully converting leads for meetings and conventions
- Abundance of professional and experienced convention services suppliers
- Has the necessary meeting facilities to compete today
- Has good, unique off-site venues for special events
- Has the necessary meeting facilities to compete for the next 10 years
Communication & Internet Infrastructure

- Substantial Wi-Fi access in meeting/convention facilities
- Good mobile coverage/availability at all attractions and entertainment areas
- Offers sufficient free Wi-Fi in outdoor/public areas
Outdoor Recreation & Sports Facilities

- Provides visitors with a wide variety of outdoor experiences
- Offers a wide diversity of parks and bike trails
- Has adequate suppliers that coincide with outdoor recreational offerings
- Local sports leadership are engaged and helpful in pursuing sporting events
- Has the sports fields and availability to host amateur sporting
- Adequate number of campgrounds and camping facilities in the area
- Has adequate number of tours available for outdoor enthusiasts
- Has the venues to host major sporting events
Community Support & Engagement – Global Averages

<table>
<thead>
<tr>
<th>Category</th>
<th>Relative Importance</th>
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<tbody>
<tr>
<td>Hospitality Culture</td>
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<td>Economic Development</td>
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<tr>
<td>Workforce</td>
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</tbody>
</table>
Workforce

- Workforce attraction & retention
- Affordable housing
- Public transportation
- Labor relations environment
Funding Support & Certainty

- Sufficient revenue sources
- Stable revenue sources
Local Community Support

• Support from local residents and media
## Community Support & Engagement – Huntington Beach, CA

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# Community Support & Engagement - Report Card

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<td>Effective DMO Governance Model</td>
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**COMMUNITY SUPPORT & ENGAGEMENT - Huntington Beach**

**INDUSTRY AVERAGE COMMUNITY SUPPORT & ENGAGEMENT**

**RESULTING SCENARIO**

**TRAILBLAZERS**

**Note**

Green shading signifies that the destination outperformed the industry average by greater than 0.2.

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**COMMUNITY SUPPORT & ENGAGEMENT - Huntington Beach**  
**INDUSTRY AVERAGE COMMUNITY SUPPORT & ENGAGEMENT**  
4.18  
3.55

**RESULTING SCENARIO**  
**TRAILBLAZERS**

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Funding Support & Certainty

- DMO revenue sources are stable and sustainable for the future
- DMO has sufficient revenue sources to fund their strategies and initiatives today
Workforce

- Workforce is stable and has a positive labor relations environment
- Hospitality industry is able to attract and retain a high-quality workforce
- Workforce is adequately trained in customer service
Partnership Support & Certainty

- Businesses that benefit from tourism/conventions find value in being a partner

- Partners are active, engaged, and supportive
Industry Support

- DMO is seen as a leader in the state
- Tourism industry leaders and stakeholders are supportive of the direction
- DMO is seen as a leader in the regional tourism industry
Regional Cooperation

- Tourism marketing efforts have broad economic benefits across the region
- Broad collaboration and coordination among tourism partners
Hospitality Culture

- Street ambassador program positively impacts the Downtown Huntington Beach visitor experience
- Hospitality-minded culture that welcomes visitors and improves their experience
- Reputation for offering high-quality customer service
Economic Development

- Tourism and the meetings industry are identified as key economic drivers
- DMO has a good working relationship with local chambers and economic development agencies
- DMO and the tourism industry play an important role in our community's economic strategies
- Tourism industry is seen as a clean industry that sustains and grows local jobs
- There is a tourism master plan that includes future capital investment and programming
Effective Advocacy Program

- Local government relies on DMO for input on destination management

- Local government is supportive of DMO programs and the tourism industry

- Advocacy program is successful in educating/informing government policy
Local Community Support

- DMO does a good job at communicating the performance and economic impact
- Tourism industry gets positive media coverage locally
- Media have a general understanding and positive perception of tourism
- DMO has great support from local corporations
- Residents have a general understanding and positive perception of tourism
Effective Destination Organization Governance Model

- Adequately measures and tracks the performance of our tourism industry
- DMO has an effective governance structure, with appropriate and effective oversight
- Local leaders are engaged in governance structure
Key Takeaways

• Currently in Trailblazers quadrant with above industry average destination strength and community support & engagement

• Stakeholders are aligned on perceptions about destination and community support

Destination Opportunities

• Innovative destination
• Arts & cultural attractions
• Historical and cultural tours
• Main street to support the brand
• International readiness
• Public transportation
• Long-term meeting facilities
• Public Wi-Fi
• Sporting venues
• Tours for outdoor enthusiasts

Community Support & Engagement Opportunities

• Tourism master plan
• Residents perception of tourism
What one thing could Huntington Beach do to become a better or world-class visitor destination?

**Attractions & Entertainment (25%)**
- Add more culturally diverse restaurants at places like Bella Terra and Pacific City
- Add additional tourist friendly businesses, restaurants and nightclubs in the downtown area
- More attractions and activities — it’s time for new products in destination
- More attractions, ‘things to do’. Find attractions and proactively bring them to Huntington Beach
- Provide higher end retail and dining
- More beachfront events i.e. car shows
- A theater for live performances
- Close second block of Main Street permanently to create a plaza environment

**Economic Development (25%)**
- Clean up Main Street
- Homelessness becomes an issue when we entertaining out of town guest in our hotels. Something must be done
- Revitalize downtown while reducing homeless impact
- Help with the homeless and the drug-users on Main Street. It has gotten much better over the last 6 months, so I am hoping the forward momentum keeps up
- Solve the homelessness problem. More parking in the downtown area
- Cut down on the amount of homeless in downtown area
- Improve the pedestrian and retail experience on Main Street
- Reduce the homeless population living on the streets

**Access and Mobility (12%)**
- Local transportation needs an infrastructure and support from not only local business but government and City officials
- Have less driving and walking congestion
- Better mass transportation
- Better signage
- Provide more public transportation
- Improve transportation access to major tourist destinations in the Greater Southern California region
Are there certain issues that Visit Huntington Beach should specifically address?

**Economic Development (45%)**
- Main street is a mess and a big turn off to visitors. Turn it into something fun
- Continue with security and cleanliness - it needs to be non-stop
- Cleaning up the down town area; restricting the number of liquor licenses
- Street lighting, cleaning of streets and thoroughfares, upkeep of landscape around the City
- Safety is always important and the city has had some bad experiences
- Make downtown a cleaner, more visitor friendly destination with more diversity of businesses

**Attraction & Entertainment (15%)**
- Help build a new Surfing Museum
- Take greater interest/ownership in surf culture
- Bring more attractions to Huntington Beach and address the homelessness issue in Downtown
- Not enough attention paid to Huntington Harbour
- Beautification of the City. Making HB feel like a resort. Parking in downtown

**Marketing (10%)**
- Visit HB is too passive, focusing their assets on reports, ad agencies, and surveys. They need to get out and actively develop new events to bring people to HB
- PR efforts to local residence
- Getting their message out to residents
306 Participants - Age Demographic

- 50 - 64: 50%
- 35 - 49: 28%
- Over 65: 17%
- 18 - 34: 5%
## Destination Strength - Public Report Card

<table>
<thead>
<tr>
<th>Variable</th>
<th>Industry Average</th>
<th>Huntington Beach Public Average</th>
<th>Standard Deviation</th>
<th>Perceived Performance (1-5 scale)</th>
<th>Industry Average</th>
<th>Huntington Beach Public Average</th>
<th>Standard Deviation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Brand</td>
<td>10.4%</td>
<td>10.7%</td>
<td>0%</td>
<td>3.46</td>
<td>3.47</td>
<td>3.91</td>
<td>0.53</td>
</tr>
<tr>
<td>Accommodation</td>
<td>10.5%</td>
<td>10.6%</td>
<td>0%</td>
<td>3.60</td>
<td>3.47</td>
<td>3.51</td>
<td>0.66</td>
</tr>
<tr>
<td>Attractions &amp; Entertainment</td>
<td>10.8%</td>
<td>10.5%</td>
<td>0%</td>
<td>3.10</td>
<td>3.00</td>
<td>3.63</td>
<td>0.59</td>
</tr>
<tr>
<td>Air Access</td>
<td>9.1%</td>
<td>10.2%</td>
<td>0%</td>
<td>3.00</td>
<td>3.00</td>
<td>2.90</td>
<td>0.53</td>
</tr>
<tr>
<td>International Readiness</td>
<td>10.0%</td>
<td>10.1%</td>
<td>0%</td>
<td>3.55</td>
<td>3.55</td>
<td>3.93</td>
<td>0.58</td>
</tr>
<tr>
<td>Events</td>
<td>9.8%</td>
<td>9.9%</td>
<td>0%</td>
<td>3.02</td>
<td>3.02</td>
<td>3.63</td>
<td>0.67</td>
</tr>
<tr>
<td>Mobility &amp; Access</td>
<td>10.1%</td>
<td>9.8%</td>
<td>0%</td>
<td>3.07</td>
<td>3.07</td>
<td>3.67</td>
<td>0.60</td>
</tr>
<tr>
<td>Convention &amp; Meeting Facilities</td>
<td>9.8%</td>
<td>9.6%</td>
<td>0%</td>
<td>3.23</td>
<td>3.23</td>
<td>3.30</td>
<td>0.63</td>
</tr>
<tr>
<td>Communication &amp; Internet Infrastructure</td>
<td>10.0%</td>
<td>9.4%</td>
<td>0%</td>
<td>3.19</td>
<td>3.19</td>
<td>3.37</td>
<td>0.59</td>
</tr>
<tr>
<td>Outdoor Recreation &amp; Sports Facilities</td>
<td>9.5%</td>
<td>9.2%</td>
<td>0%</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**DESTINATION STRENGTH - Huntington Beach Publ**: 3.59

**INDUSTRY AVERAGE DESTINATION STRENGTH**: 3.36

**RESULTING SCENARIO**: TRAILBLAZERS

**Note**
- Greenshading signifies that the public group outperformed the destination average by greater than 0.2.
- Yellow shading signifies that the public group underperformed the destination average by greater than 0.2 but less than 0.4.
- Red shading signifies that the public group underperformed the destination average by greater than 0.4.
## Destination Strength - Public Report Card

<table>
<thead>
<tr>
<th>Variable</th>
<th>Huntington Beach Stakeholders</th>
<th>Public</th>
</tr>
</thead>
<tbody>
<tr>
<td>Brand</td>
<td>4.14</td>
<td>3.91</td>
</tr>
<tr>
<td>Accommodation</td>
<td>4.21</td>
<td>4.00</td>
</tr>
<tr>
<td>Attractions &amp; Entertainment</td>
<td>3.50</td>
<td>3.51</td>
</tr>
<tr>
<td>Air Access</td>
<td>3.81</td>
<td>3.63</td>
</tr>
<tr>
<td>International Readiness</td>
<td>2.78</td>
<td>2.90</td>
</tr>
<tr>
<td>Events</td>
<td>4.00</td>
<td>3.93</td>
</tr>
<tr>
<td>Mobility &amp; Access</td>
<td>3.73</td>
<td>3.63</td>
</tr>
<tr>
<td>Convention &amp; Meeting Facilities</td>
<td>3.77</td>
<td>3.67</td>
</tr>
<tr>
<td>Communication &amp; Internet</td>
<td>3.19</td>
<td>3.30</td>
</tr>
<tr>
<td>Outdoor Recreation &amp; Sports Facilities</td>
<td>3.35</td>
<td>3.37</td>
</tr>
</tbody>
</table>

DESTINATION STRENGTH - Huntington Beach | 3.59
INDUSTRY AVERAGE DESTINATION STRENGTH | 3.36

**RESULTING SCENARIO**

| TRAILBLAZERS |

**Note**
Green shading signifies that the public outperformed the stakeholder average by greater than 0.2.
Yellow shading signifies that the public underperformed the stakeholder average by greater than 0.2 but less than 0.4.
Red shading signifies that the public underperformed the stakeholder average by greater than 0.4.
## What one thing could Huntington Beach do to become a better or world-class visitor destination?

<table>
<thead>
<tr>
<th>Economic Development (45%)</th>
<th>Mobility and Access (15%)</th>
<th>Attractions &amp; Entertainment (10%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Address homeless encampments in the Downtown and Beach areas</td>
<td>• Transportation for visitors. The shuttle was a good idea</td>
<td>• Better dining options</td>
</tr>
<tr>
<td>• Address homeless in downtown area</td>
<td>• Turn Main street into a walking only street</td>
<td>• Better restaurants with a diverse cuisine. Bring in famous chefs</td>
</tr>
<tr>
<td>• Alleviate the homeless and panhandling traffic</td>
<td>• We need more protected bike lanes and bike paths</td>
<td>• Diverse experiences besides surfing</td>
</tr>
<tr>
<td>• Become environmentally friendly green city and plant more trees</td>
<td>• Make downtown Main Street pedestrian only, closed to cars</td>
<td>• Have a street performing program that brings in world class performers to make people have some fun, smile and laugh</td>
</tr>
<tr>
<td>• Better programs to deal with the increasing homeless population at the beach and public parks</td>
<td>• More frequent public transportation and expanded routes</td>
<td>• HB needs more variety of things to do on and near the beach</td>
</tr>
<tr>
<td>• Better security on main street</td>
<td>• Improve public transport</td>
<td>• More advertising</td>
</tr>
<tr>
<td>• Clean up and diversify downtown</td>
<td>• Extend Main street and parallel streets to pedestrian only, with more diverse dining and shopping options</td>
<td>• Build a new International Surfing Museum. And work on our history for visitors to see</td>
</tr>
<tr>
<td>• Reduce Air Traffic noise</td>
<td>• The traffic for major events is a problem. Events need more parking and shuttle options for large crowds</td>
<td>• Continue supporting the US Open of Surfing</td>
</tr>
<tr>
<td>• Reduce crime</td>
<td></td>
<td>• More free outdoor concerts and movies</td>
</tr>
<tr>
<td>• Care about the Environment since HB is tied to the Beach</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Are there certain issues that Visit Huntington Beach should specifically address?

<table>
<thead>
<tr>
<th>Economic Development (50%)</th>
<th>Accommodation (12%)</th>
<th>Mobility and Access (10%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>• The airplane noise</td>
<td>• Enforce existing laws against short term vacation rentals</td>
<td>• Too much traffic on Main street</td>
</tr>
<tr>
<td>• Clean up downtown, the beaches, the wetlands, and get rid of the oil rigs out in the ocean</td>
<td>• Economy accommodation</td>
<td>• Traffic is a concern</td>
</tr>
<tr>
<td>• Homelessness</td>
<td>• Capacity for short stays</td>
<td>• Traffic along PCH, Orange, Main street</td>
</tr>
<tr>
<td>• Litter on streets and at beach, especially after rains.</td>
<td>• Short term rentals should be allowed, encouraged, and taxed</td>
<td>• Parking and traffic flow during large events</td>
</tr>
<tr>
<td>• Downtown doesn’t always feel safe</td>
<td>• Allow residents to host visitors in their homes, thus providing them with a hosted, American experience</td>
<td>• Traffic and synchronization of traffic lights</td>
</tr>
<tr>
<td>• Safety-homeless, drug users, thefts, assaults. Step up enforcement even of minor crimes</td>
<td>• Allow Airbnb like most other tourist destinations</td>
<td>• Better bike lanes / access through the city, especially in the downtown vicinity, and better wider sidewalks for strolling</td>
</tr>
<tr>
<td>• Poverty and homelessness</td>
<td>• During high tourist season, there is no room for the locals</td>
<td>• Improved public transport</td>
</tr>
<tr>
<td></td>
<td>• Allow home owners the option to rent to short term stays (Airbnb, etc) to make HB more accessible to families</td>
<td>• Traffic around Bella Terra and Pacific City</td>
</tr>
</tbody>
</table>
Questions & Comments
Thank You!

paul.ouimet@nextfactorinc.com