

Lauren Schlan
Consulting

Huntington Beach 2018 Visitor Profile & Economic Impacts



August 2019



August, 2019

Susan Thomas
Vice President - Marketing
Visit Huntington Beach

Dear Ms. Thomas:

Attached is the 2018 Huntington Beach Visitor Profile and Economic & Fiscal Impacts report. The results and our findings represent tourism activity based on 1,500 on-site visitor interviews. The visitor volume and economic and fiscal impacts were estimated by CIC Research, Inc. and Tourism Economics using the base visitor survey data and econometric modeling.

If you have questions or seek further interpretation or application of the results, please contact me.

It has been our pleasure to work with you, your associates, and the Huntington Beach tourism industry during this most worthwhile engagement.

Sincerely,

A handwritten signature in dark ink, appearing to read "Lauren Schlan", is placed above the title "President".

President

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SECTION I

Executive Summary of Findings

EXECUTIVE SUMMARY - BACKGROUND

Overview: Huntington Beach is a popular Southern California coastal resort, and the embodiment of its brand, “Surf City USA.”

- Visit Huntington Beach (VHB) is the official entity marketing and managing the destination brand to ensure a satisfying visitor (and community) experience.
- **Study Objectives:** Given tourism’s importance to the local economy, VHB commissioned this comprehensive study to measure the size, economic and fiscal contributions of the city’s tourism industry, and to identify visitor characteristics and demographics.
 - A similar study was conducted in 2011 and corresponding results are compared as shown in parenthesis () after the 2018 results.
 - The study and final results represent calendar year 2018.
 - The analysis is based on quarterly intercept interviews among 1,511 visitor groups, an analysis of paid lodging performance and city tax revenue.
- The results are invaluable for guiding marketing, operations and development in order to optimize the city’s tourism market.



EXECUTIVE SUMMARY – KEY FINDINGS

- **Tourism is important to Huntington Beach and its economy.** The city attracts nearly 4 million annual visitors (from outside Orange County), accounts for \$541 million in direct spending, generates \$16 million in lodging and retail sales taxes, and supports 4,500 local jobs.
 - All these indicators are strongly and up sharply since 2011 (when this study was last conducted).
- **Surf City USA defines the city** as distinct and authentic, creates awareness and buzz, attracts a worldwide visitor base and positions Huntington Beach as *THE* quintessential beach/surf destination.
- **Reach:** Visitors originate from worldwide markets, with more in 2018 than 2011, still the vast majority are from Southern California. While regional visitors generate repeat volume, they stay shorter and spend about half versus other visitors.
- **Purpose/Segment:** Most Huntington Beach visitation is **leisure** based, i.e., vacation/pleasure and outdoor recreation, as may be expected for a coastal destination. Beach going is a key activity either by itself or with other beach activities such as bonfires and watersports.
 - The conference sector is important as attendees stay in hotels and can lengthen visits if they extend to “bleisure” trips.
- **Satisfaction and Return:** Visitors are **highly satisfied** with the destination, and **highly likely to return** to Huntington Beach.
- **Affordable:** Relative to other coastal destinations, Huntington Beach offers a **good travel value**. While (somewhat) branded as a luxury destination, visitor income suggests they are middle class, especially considering median age of 35-39 and the largest age segment, 18-29 have the lowest income.

EXECUTIVE SUMMARY

OPPORTUNITIES

- **Surf City USA defines the city:** surfing tends to be oriented to youth – but they have less disposable income for spending on retail, eating out, and amenities than older, more affluent travelers.
Opportunity: continue to leverage surfing as associated with fun and the “cool” factor, as well as water related sports and activities beyond surfing specifically to broaden reach and markets. The Bolsa Chica wetlands is also a unique advantage to eco-tourists.
- **Beach Orientation:** tends to concentrate visitation in peak summer season, like other coastal areas.
Opportunity: to ramp up marketing for other seasons, which have good or even better beach weather, especially early – mid fall and springtime – possibly through specified special events and special promotions/packages for non-summer holidays (e.g., Valentine’s Day, Mother’s Day, Thanksgiving, December holidays).
- **Reach:** 90% of visitors from Southern California do not stay overnight in Huntington Beach and 90% have visited before, on average 20 times in the past three years, while their lower spending while here lowers potential economic impact.
Opportunity: concentrate on longer haul markets (especially land locked) seeking the quintessential beach experience Huntington Beach offers. Research suggests these being Northern California and major metros in the West.
- **Segments: Opportunity:** The research data confirms that key segments (messaging) include luxury leisure, multi-generational and young (millennial) families, as well as Huntington Beach conference attendees to extend trips for pleasure.
- **Competitive Advantage:** Huntington Beach offers affordability (value), a competitive advantage relative to other beach destinations, as well as luxury, but laid-back and unpretentious.
Opportunity: message value and fun to younger segments and luxury to higher income segments.

SUMMARY OF IMPACTS – \$541 MILL. TOTAL SPENDING & \$16 MILL. IN TAXES

Huntington Beach visitors generated the following overall economic and fiscal impacts for 2018 and as compared to 2011 (shown in parentheses () after the 2018 result):

- Total of **3.7 million visitors** in 2018, up 27% from 2.9 million in 2011
- Their **1.57 (1.56) days stay** yielded **5.9 (4.6) million annual visitor days**
- Visitors spent **\$95.91 (\$61.68)** daily per-capita, generating \$541 (\$282) million of total direct spending
- Visitor spending generated **\$16.1 (\$8.2) million in tax revenue** to the City of Huntington Beach, **\$13.1 (\$6.6) million of lodging tax** and **\$2.98 (\$1.6) million of retail sales tax**
- Visitor spending supported 4,479 (2,721) local **jobs**, 5.3% (3.6%) of citywide workforce *)

Table 1 – Summary of Visitor Volume and Spending

| Measure | 2018 | 2011 | % Change 2018/2011 |
|----------------------------------|---------------|---------------|--------------------|
| Total Visitor Volume | 3,743,400 | 2,940,000 | 27.4% |
| Avg. length of stay (days) | 1.57 | 1.56 | .6% |
| Total Visitor Days | 5,883,100 | 4,570,000 | 28.7% |
| Avg. Daily Spending Per Visitor | \$91.95 | \$61.68 | 49.1% |
| Total Visitor Spending | \$540,938,600 | \$281,900,000 | 91.9% |
| Lodging and Sales Tax Generated | \$16,125,300 | \$8,200,000 | 95.6% |
| Local Jobs Supported by Visitors | 4,479 | 2,721 | 64.6% |

* Profile of City of Huntington Beach, So. California Assoc. Governments, citywide jobs of 84,151 in 2018 and 75,675 in 2011.

DAY VISITORS HIGHEST VOLUME; HOTEL GUESTS MOST SPENDING IMPACT

Comparing key measures by visitor lodging¹ provides deeper insight, discussed and shown in the table below.

- As shown, Day visitors were the largest segment at 2.9 (2.3) million and represent 77% (80%) of total volume. Another 655,400 (377,600) or nearly 18% (13%) were Hotel guests while 191,100 (219,500) or 5.1% (7.5%) were Other Lodging guests. Thus volume shifted sharply to Hotel from Other lodging.
- When factoring in length of visit, Day visitors (one-day stay) slipped to a 49% (51%) share of total visitor days, while Other Lodging guests, with a 5.2 (4.5) day stay, represented 17% (21%) of visitor days, while Hotel guests who stayed 3.1 nights, generated 2.0 (1.2) million visitor days, a 34% (27%) share.
- These dynamics are even more evident and divergent in terms of total spending, with Hotel guests' share soared to almost 69% (60%) at \$371 (\$167) million, with daily per-capita spending of \$186 (\$136). Other Lodging guests spent \$65 (\$16) million accounting for 12% (17%) of spending with \$66 (\$48) spent per capita, with Day visitor share at 19% (23%) for \$105 (\$65.9) million total spending based on \$36 (\$28) spent daily per-capita.

Table 2 – Visitor Volume, Days and Spending by Lodging Segment

| Visitor Category | Volume | Ratio Total Visitors | Avg. Stay in HB (days) | Total Visitor Days | Ratio Total Days | Avg. Group Size | Avg. Daily Per Capita Spending | Total Annual Expenditures | Ratio Spending |
|---------------------------|------------------|----------------------|------------------------|--------------------|------------------|-----------------|--------------------------------|---------------------------|----------------|
| Hotel | 655,356 | 17.5% | 3.05 | 1,998,782 | 34.0% | 3.25 | \$ 185.80 | \$ 371,365,823 | 68.7% |
| Other Paid Lodging | 31,465 | 0.8% | 5.38 | 169,147 | 2.9% | 3.43 | \$ 95.22 | \$ 16,106,650 | 3.0% |
| Private Home- unpaid | 159,652 | 4.3% | 5.13 | 818,215 | 13.9% | 2.35 | \$ 59.36 | \$ 48,570,474 | 9.0% |
| Total Other Paid & Unpaid | 191,117 | 5.1% | 5.17 | 987,362 | 16.8% | 2.48 | \$ 65.50 | \$ 64,677,123 | 12.0% |
| Day Visitors | 2,896,937 | 77.4% | 1.00 | 2,896,937 | 49.2% | 2.87 | \$ 36.21 | \$ 104,895,677 | 19.4% |
| Total Visitors | 3,743,410 | 100.0% | 1.57 | 5,883,082 | 100.0% | 2.90 | \$ 91.95 | \$ 540,938,623 | 100.0% |

¹ "Hotel" are overnight guests in a Huntington Beach hotel, motel or inn; "Other Paid Lodging" guests stayed in non-hotel paid lodging, Private home is unpaid lodging; "Day visitors" are in Huntington Beach only for the day.

VISITORS SPENT \$173 MILL. ON MEALS OUT

Aggregate annual and per-person daily visitor spending in Huntington Beach by category are discussed below and shown on the table.

- Visitors' top spending categories were:
 - Meals out was first at \$172.5 (\$90.7) million, and 32% of spending both years.
 - With beverages at \$61.5 (\$26.7) million the combined category totaled \$234 (\$117) million, or 43% (42%) of total spending.
 - Lodging was next at \$153 (\$73.7) million, 28% (26%) of the total.
 - Shopping/gift spending reached \$89.2 (\$66.9) million, 17% (24%) of the total.
- The next tier shows visitor spending of:
 - \$21.8 (\$12.8) million, 4.0% (5%) on local transportation
 - \$18.6 (\$5.1) million or 3% (2%) for groceries/incidentals
 - \$10.5 million, 2% for attractions/admissions

Table 3 – Visitor Spending by Category

| Spending Category | Spending per Visitor | Total Annual Expenditures* | Spending Ratio |
|-------------------------|----------------------|----------------------------|----------------|
| Meals | \$ 29.32 | \$ 172,511,974 | 31.9% |
| Lodging | \$ 26.08 | \$ 153,440,899 | 28.4% |
| Shopping/gifts | \$ 15.17 | \$ 89,217,111 | 16.5% |
| Beverages | \$ 10.45 | \$ 61,495,694 | 11.4% |
| Daily Transport/parking | \$ 3.71 | \$ 21,833,874 | 4.0% |
| Groceries/incidentals | \$ 3.15 | \$ 18,553,830 | 3.4% |
| Attractions/admissions | \$ 1.78 | \$ 10,493,909 | 1.9% |
| Spa/beauty/health club | \$ 1.39 | \$ 8,178,187 | 1.5% |
| Activities | \$ 0.89 | \$ 5,213,144 | 1.0% |
| Total | \$ 91.95 | \$ 540,938,623 | 100.0% |

VISITOR INDIRECT & INDUCED SPENDING ADDED \$162 MILLION TO HB ECONOMY

- In addition to the \$540.9 (\$281.9) million of direct visitor spending, additional indirect and induced impacts benefit the Huntington Beach economy:
 - On the basis of spending inputs and the econometric model the impact multiplier equates to 1.3 times direct spending.
- Huntington Beach's indirect and induced benefits impacts add another \$162.1 (\$84.6) million to the economy for total impact of \$703 (\$366.5) million.

Table 4 – Total Visitor Direct, Indirect and Induced Spending Impacts *

| | 2018 | 2011 |
|--|-----------------------|----------------------|
| Direct spending | \$ 540,900,000 | \$ 281,900,000 |
| Multiplier (indirect & induced impacts) | 1.3 | 1.3 |
| Additional Impacts | <u>\$ 162,100,000</u> | <u>\$ 84,600,000</u> |
| Total Direct, Indirect & induced Economic Impacts * | \$ 703,000,000 | \$366,500,000 |

* excludes second home-owner impacts

Source: Tourism Economics, CIC Research, Inc., and Lauren Schlau Consulting

HOTEL/MOTEL SUPPLY HAS GROWN & PERFORMS WELL

Huntington Beach, in the Orange County lodging market and Orange Coast submarket, showed substantial growth in both supply and demand since 2011.

- The 2018 Huntington Beach lodging market contained 23 (versus 17 in 2011) hotels, motels and inns with 2,468 rooms, a 35% increase from 1,826 rooms in 2011.
- The lodgings fall into three tiers: First-Class with 4 (3) properties and 1,362 (964) available rooms, Mid-Level consists of 11 (7) lodgings with 853 (623) rooms, and Value has 8 (7) motels with 253 (239) rooms.
- On an annualized basis, these properties offer 900,820 (666,490) available rooms.
- In 2018 the market achieved an overall occupancy rate of 74.3% well above 66.9% in 2011 despite the new supply as noted above. In 2018 a total of 669,300 rooms were occupied, up 50% from 445,847 in 2011.
- Average daily rate was \$210 for all marketwide, up 39.1% from \$151 in 2011.

Table 5 – Huntington Beach Hotel/Motel Supply and Demand

| 2018 HB Lodging Market | Properties | Daily Available Rooms | Annual Avail. Rooms | Annual Occupied Rooms | Occupancy Rate | Avg. Room Rate |
|------------------------|------------|-----------------------|---------------------|-----------------------|----------------|----------------|
| First Class | 4 | 1,362 | 497,130 | | | |
| Mid-Level | 11 | 853 | 311,345 | | | |
| Value | 8 | 253 | 92,345 | | | |
| Total Market | 23 | 2,468 | 900,820 | 669,300 | 74.3% | \$210 |

* 103 rooms of the growth came from the city's annexation of Sunset Beach since the last study.
Note, occupancy and rate are not available by tier in 2018.

FISCAL/TAX IMPACTS OF \$16 MILL. TO THE CITY FROM TAXABLE VISITOR SPENDING

Visitor spending generates taxes directly to the City of Huntington Beach.

- The City realizes all of the 10% "transient occupancy" (lodging) tax ¹ and one percentage point of 7.75% levied on taxable retail items, meals and beverages, and on a portion of groceries and local transportation, all of which accrue to the City's general fund.
- In 2018 the City received an estimated \$16.1 (\$8.2) million in taxes from \$430 (\$232) million of *taxable* direct visitor spending on lodging and retail items.
 - Of these taxes \$13.1 (\$6.6) million was lodging tax and \$3.0 (\$1.7) million was retail sales tax.
 - These taxes are the equivalent of \$208 for each of the city's 77,666 households.

Table 6 – Visitor Spending Generated Lodging and Sales Tax

| Taxable Category | Tax Rate | Taxable Total Visitor Spending | City HB Tax Revenues |
|--------------------------------------|----------|--------------------------------|----------------------|
| Lodging ¹ | 10.0% | \$ 131,441,133 | \$ 13,144,113 |
| Meals | 1.0% | \$ 146,506,985 | \$ 1,465,070 |
| Beverages | 1.0% | \$ 52,225,642 | \$ 522,256 |
| Shopping/gifts | 1.0% | \$ 82,800,103 | \$ 828,001 |
| Daily Transportation (parking, fuel) | 1.0% | \$ 6,079,037 | \$ 60,790 |
| Spa/Beauty/Health Club | 1.0% | \$ 1,897,491 | \$ 18,975 |
| Groceries/incidentals/other | 1.0% | \$ 8,609,666 | \$ 86,097 |
| Total | | \$ 429,560,057 | \$ 16,125,302 |
| Retail Only (less lodging) | | \$ 298,118,924 | \$ 2,981,189 |

¹ Lodging tax to the city excludes the 3% levied on hotel guests allocated for the Tourism Marketing District.

Note: Admissions and activities are non-taxable and excluded from the tax calculation.

TOURISM SUPPORTS NEARLY 4,500 LOCAL JOBS

- Direct visitor spending (net of taxes and tips) in the categories covered below supported 4,479 * (2,721) full-time equivalent jobs in Huntington Beach in 2018.
- With a citywide workforce¹ of 84,151 (75,675) tourism supported 5.3% (3.6%) of local jobs.
- The top employment categories are:
 - 2,046 (1,284) or 48% (47%) of jobs in eating and drinking outlets (combined meals and beverages)
 - 1,515 (852) or 34% (31%) of jobs in paid lodging accommodations
 - 262 (263) or 6% (10%) of jobs in retail outlets related to visitor shopping expenditures

Table 7 – Jobs Supported in Huntington Beach from Tourism Activity

| Taxable Category | Direct Tourism Jobs | Ratio Total Tourism Jobs |
|-----------------------------|---------------------|--------------------------|
| Lodging | 1,515 | 33.8% |
| Meals/restaurants | 1,582 | 35.3% |
| Beverages/drinking places | 564 | 12.6% |
| Shopping/gifts | 262 | 5.8% |
| Attractions | 178 | 4.0% |
| Transportation | 149 | 3.3% |
| Spa/Beauty/Health Club | 85 | 1.9% |
| Activities | 88 | 2.0% |
| Groceries/incidentals/other | 56 | 1.3% |
| Total | 4,479 | 100.0% |

¹ Profile of City of Huntington Beach, Southern California Assoc. Governments; 2018 and 2011

* An additional 1,418 jobs are reported as supported by tourism in an accompanying report by Tourism Economics for Visit Huntington Beach using a different approach.

HIGH SATISFACTION & INTENT TO RETURN

Satisfaction

- 90% (87%) of visitors were “highly” satisfied with Huntington Beach as a destination, that is, 48% (39%) were extremely and 42% (49%) very satisfied.
- This varied slightly by origin, with 96% (95%) of non-Southern Californians and 90% (80%) of Other U.S. most satisfied, and more so than in 2011.
- Overall satisfaction with Huntington Beach was rated at 4.37 (4.25).

Table 8a – Satisfaction with Destination

| | Total | Residence | | | |
|------------------------------|--------------|--------------|--------------|--------------|--------------|
| | | California | | U.S. | Int'l |
| | | So. CA | Other CA | | |
| Base: | 1511 | 622 | 111 | 587 | 191 |
| Extremely satisfied | 48.1% | 46.1% | 55.6% | 50.8% | 44.5% |
| Very satisfied | 41.8% | 42.6% | 40.6% | 39.1% | 47.1% |
| Extremely + Very Sat. | 90.0% | 88.7% | 96.2% | 89.9% | 91.6% |
| Somewhat satisfied | 8.8% | 10.0% | 2.8% | 9.2% | 5.9% |
| Somewhat unsatisfied | 0.4% | 0.1% | 0.0% | 0.4% | 1.5% |
| Very unsatisfied | 0.5% | 0.7% | 1.0% | 0.2% | 0.0% |
| Mean rating (5 →1) | 4.37 | 4.33 | 4.50 | 4.40 | 4.35 |

Future Return Intent

- In 2018 82% indicated they would be very or extremely (i.e., “highly”) likely to return to HB in the future versus 93% in 2011.
- This drop may be (partly) due to the higher International share who, along with Other U.S. more longer-haul visitors are less likely than regional visitors to return.
- Overall, intent to return is rated at 4.29 (4.34) or very likely.

Table 8b – Likely to Return to HB

| | Total | Residence | | | |
|---------------------------------|--------------|--------------|--------------|--------------|--------------|
| | | California | | U.S. | Int'l |
| | | So. CA | Other CA | | |
| Base: | 1511 | 622 | 111 | 587 | 191 |
| Extremely likely | 55.1% | 69.3% | 54.7% | 39.2% | 40.0% |
| Very likely | 26.8% | 23.8% | 31.3% | 29.1% | 29.9% |
| Extremely + Very Likely: | 81.9% | 93.1% | 86.0% | 68.3% | 69.9% |
| Somewhat likely | 12.6% | 5.3% | 8.7% | 21.6% | 20.3% |
| Somewhat unlikely | 3.3% | 0.4% | 3.3% | 6.7% | 5.6% |
| Very unlikely | 2.2% | 1.2% | 1.9% | 3.3% | 3.9% |
| Mean likelihood (5 →1) | 4.29 | 4.60 | 4.34 | 3.94 | 3.97 |

SUMMARY VISITOR PROFILE

Huntington Beach visitors in 2018 (and compared to 2011)...

- Mainly California residents 56% comparable to 55% in 2011, and again primarily from Southern California.
- Far more repeat, 64% (53%) with 36% (47%) first time visitors in the past three years, thus a shift to more repeat visitors, and visiting more often, taking 12 (9) trips here in the past three years.
- Huntington Beach was the main trip destination for 55% (61%) of visitors
- In 2018 60% arrived in Orange County by personal vehicle versus 68%, however fewer, 18% versus 23% in 2011 flew into the region thus reflecting HB's still strong regional visitor base.
- 53% versus 77% were in Huntington Beach for vacation/leisure purpose.
- Going to the beach was the top Huntington Beach activity, but by 43% in 2018 versus 70% in 2011.
- The share of overnight visitors rose to 23% from 20% in 2011, thus still 77% (80%) were here only for the Day. Of 2018 overnight visitors more, 77% versus 63% in 2011 lodged in a local hotel.
- Each visitor spent an overall average of \$95 (\$62) per day in Huntington Beach, a 53% increase.
- More visitor groups in 2018, 48% versus 37% in 2011 were traveling as a family, however average group size dipped slightly to 3.4 from 3.6 persons.
- Fewer, 53% reported being married versus 63% in 2011.
- Respondents were 36.8 years of age (median) both years.
- Respondents reported higher total annual average household income, \$85,000 versus \$79,000 for 2011.

PROFILE OF A TYPICAL HUNTINGTON BEACH VISITOR

Table 9 – Summary Visitor Profile Characteristics

| Characteristic | 2018 | 2011 |
|---|-------------|-------------|
| % California resident visitor | 56% | 55% |
| % Other U.S. resident visitor (excl. California) | 33% | 36% |
| % International resident visitor | 11% | 9% |
| % First-Time Visitor / % Repeat Visitor | 36% / 64% | 47% / 53% |
| # prior visits (past three years - repeat visitors) | 12.0 | 8.7 |
| Huntington Beach named main trip destination | 55% | 61% |
| % drove own vehicle / % airline into Southern California | 60% / 18% | 68%/23% |
| % Visiting Huntington Beach for pleasure/leisure/vacation (main purpose) | 53% | 77% |
| Top activities in Huntington Beach: going to the beach | 43% | 70% |
| Top Huntington Beach venue visited: beaches | 48% | 73% |
| % of visitors staying Overnight / % Day visitors in Huntington Beach | 23% / 77% | 20%/80% |
| % of Overnight Visitors staying in a Huntington Beach hotel | 77% | 63% |
| Average stay in Huntington Beach - all visitors/all overnight visitors (days) | 1.57 / 3.53 | 1.56 / 3.74 |
| Average stay in Huntington Beach - all hotel guests (days) | 3.01 | 3.27 |
| Average daily spending per person in Huntington Beach - all | \$92 | \$62 |
| Average daily spending per person in Huntington Beach – Hotel guests | \$186 | \$136 |
| Average daily spending per person in Huntington Beach – Other lodging | \$95 | \$48 |
| Average daily spending per person in Huntington Beach - Day visitors | \$36 | \$28 |
| % traveling with family | 48% | 37% |
| Average travel group size (persons) | 2.9 | 3.6 |
| % married or partnered/% single | 53% / 32% | 63%/35% |
| Average age (respondent) | 36.8 | 36.8 |
| Average annual household income | \$85,000 | \$79,000 |

TOP FEEDER MARKETS – CALIFORNIA, U.S; EUROPE INTERNATIONAL

- California was again the top domestic feeder market, with 63% (60%) of U.S. visitation share. Utah is a distant second with nearly 4% (5%), with Nevada at 3% (3%) and Arizona at 3% (11%).
 - These inland states present Huntington Beach with a good opportunity to broaden its market capture there.
- Europe was the top international feeder region at 22% (22%) share, of which western Europe was 13% (12%) and Central/eastern Europe at 9% (10%). Next was Canada with 18% (37%) share, of which western Canada had 13% (31%) and eastern Canada 5% (16%).
- Asia was third at 11% (n/a) while the U.K. with 8% was well below its 18% share in 2011.

Table 10 - Top US and International Feeder Markets

| Total Top U.S. States (of visitor origin) | Share of U.S | Total Top Countries(of visitor origin) | Share of Int'l. |
|--|-----------------|--|--------------------|
| Base: U.S. Residents | 1320 | Base: Visitors to US | 191 |
| California | 63.1% | Europe: Western (excl. UK) | 12.6% |
| Utah | 3.7% | Canada - Western | 12.5% |
| Nevada | 3.3% | Asia | 10.9% |
| Arizona | 3.1% | Europe: Central and Eastern | 8.8% |
| Washington | 2.6% | Utd. Kingdom | 7.7% |
| Colorado | 2.4% | South America | 7.1% |
| Texas | 1.5% | Central America | 5.5% |
| Illinois | 1.2% | Australia/ New Zealand | 5.2% |
| New York | 1.2% | Mexico | 4.9% |
| Florida | 1.2% | Canada - Eastern | 4.7% |
| Top 10 States | 83.3% | Top Ten | 79.9% |

SECTION 2

- Visitor Volume**
- Detailed Economic and Fiscal Impacts**

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Table 12 – Visitor Volume, Days and Spending by Lodging Segment

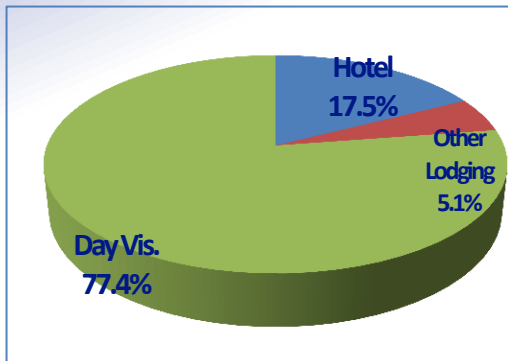
| Visitor Category | Volume | Ratio Total Visitors | Avg. Stay in HB (Days) | Total Visitor Days | Ratio Total Days | Avg. Group Size | Avg. Daily Per Capita Spending | Total Annual Expenditures | Ratio Spending |
|---------------------------|------------------|----------------------|------------------------|--------------------|------------------|-----------------|--------------------------------|---------------------------|----------------|
| Hotel | 655,356 | 17.5% | 3.05 | 1,998,782 | 34.0% | 3.25 | \$ 185.80 | \$ 371,365,823 | 68.7% |
| Other Paid Lodging | 31,465 | 0.8% | 5.38 | 169,147 | 2.9% | 3.43 | \$ 95.22 | \$ 16,106,650 | 3.0% |
| Private Home- unpaid | 159,652 | 4.3% | 5.13 | 818,215 | 13.9% | 2.35 | \$ 59.36 | \$ 48,570,474 | 9.0% |
| Total Other Paid & Unpaid | 191,117 | 5.1% | 5.17 | 987,362 | 16.8% | 2.48 | \$ 65.50 | \$ 64,677,123 | 12.0% |
| Day Visitors | 2,896,937 | 77.4% | 1.00 | 2,896,937 | 49.2% | 2.87 | \$ 36.21 | \$ 104,895,677 | 19.4% |
| Total Visitors | 3,743,410 | 100.0% | 1.57 | 5,883,082 | 100.0% | 2.90 | \$ 91.95 | \$ 540,938,623 | 100.0% |

¹ “Hotel” are overnight guests in a Huntington Beach hotel, motel or inn; “Other Paid Lodging” guests stayed in non-hotel paid lodging, Private home is unpaid lodging; “Day visitors” are in Huntington Beach only for the day.

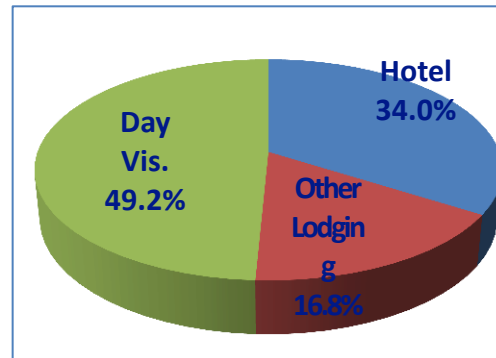
THE MAIN SHARE OF VISITOR VOLUME IS DAY VISITORS

Exhibit I: Comparative Share of Visitor Volume, Days, Spending

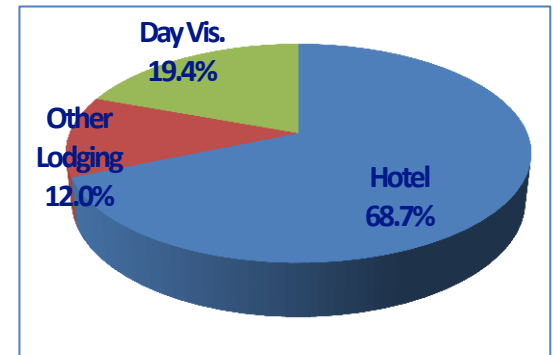
Volume



Visitor Days



Visitor Spending



VISITORS SPENT THE MOST \$173 MILL. ON MEALS OUT

By category, visitor spending in Huntington Beach on an aggregate annual basis, and per-person per-day are discussed below and shown on the table.

- Visitors' top spending categories were:
 - Meals out was first at \$172.5 (\$90.7) million, and 32% of spending both years.
 - With beverages at \$61.5 (\$26.7) million the combined category totaled \$234 (\$117) million, or 43% (42%) of total spending.
 - Lodging was next at \$153 (\$73.7) million, 28% (26%) of the total.
 - Shopping/gift spending reached \$89.2 (\$66.9) million, 17% (24%) of the total.
- The next tier shows visitor spending of:
 - \$21.8 (\$12.8) million, 4.0% (5%) on local transportation
 - \$18.6 (\$5.1) million or 3% (2%) for groceries/incidentals
 - \$10.5 million, 2% for attractions/admissions

Table 13 – Visitor Spending by Category

| Spending Category | All Visitors to Huntington Beach | | |
|-------------------------|----------------------------------|----------------------------|----------------|
| | Spending per Visitor | Total Annual Expenditures* | Spending Ratio |
| Meals | \$ 29.32 | \$ 172,511,974 | 31.9% |
| Lodging | \$ 26.08 | \$ 153,440,899 | 28.4% |
| Shopping/gifts | \$ 15.17 | \$ 89,217,111 | 16.5% |
| Beverages | \$ 10.45 | \$ 61,495,694 | 11.4% |
| Daily Transport/Parking | \$ 3.71 | \$ 21,833,874 | 4.0% |
| Groceries/incidentals | \$ 3.15 | \$ 18,553,830 | 3.4% |
| Attractions/admissions | \$ 1.78 | \$ 10,493,909 | 1.9% |
| Spa/Beauty/Health Club | \$ 1.39 | \$ 8,178,187 | 1.5% |
| Activities | \$ 0.89 | \$ 5,213,144 | 1.0% |
| Total | \$ 91.95 | \$ 540,938,623 | 100.0% |

HOTEL GUESTS SPENT MOST BY FAR VERSUS OTHER LODGING SEGMENTS IN 2018

Table 14a - Spending by Lodging Segment – 2018

| Spending Category | Hotel Visitors | | | Day Visitors | | | Other Overnight Visitors | | | All Visitors | | |
|------------------------------|------------------|-----------------------|---------------|------------------|-----------------------|---------------|--------------------------|---------------------|---------------|------------------|-----------------------|---------------|
| | Daily Per Capita | Total Annual | Ratio Total | Daily Per Capita | Total Annual | Ratio Total | Daily Per Capita | Total Annual | Ratio Total | Daily Per Capita | Total Annual | Ratio Total |
| Lodging | \$ 74.31 | \$ 148,528,480 | 40.0% | \$ - | \$ - | 0.0% | \$ 4.98 | \$ 4,912,420 | 7.6% | \$ 26.08 | \$ 153,440,899 | 28.4% |
| Meals | \$ 51.84 | \$ 103,620,593 | 27.9% | \$ 15.19 | \$ 44,003,865 | 42.0% | \$ 25.21 | \$24,887,516 | 38.5% | \$ 29.32 | \$ 172,511,974 | 31.9% |
| Beverages | \$ 19.29 | \$ 38,557,697 | 10.4% | \$ 5.12 | \$ 14,844,193 | 14.2% | \$ 8.20 | \$ 8,093,805 | 12.5% | \$ 10.45 | \$ 61,495,694 | 11.4% |
| Shopping/gifts | \$ 21.02 | \$ 42,020,156 | 11.3% | \$ 10.60 | \$ 30,711,013 | 29.3% | \$ 16.70 | \$16,485,943 | 25.5% | \$ 15.17 | \$ 89,217,111 | 16.5% |
| Attractions/ admissions | \$ 3.81 | \$ 7,620,678 | 2.1% | \$ 0.36 | \$ 1,047,856 | 1.0% | \$ 1.85 | \$ 1,825,374 | 2.8% | \$ 1.78 | \$ 10,493,909 | 1.9% |
| Local transportation | \$ 6.99 | \$ 13,971,253 | 3.8% | \$ 2.09 | \$ 6,065,103 | 5.8% | \$ 1.82 | \$ 1,797,518 | 2.8% | \$ 3.71 | \$ 21,833,874 | 4.0% |
| Spa/beauty/health club | \$ 3.25 | \$ 6,502,727 | 1.8% | \$ 0.38 | \$ 1,096,138 | 1.0% | \$ 0.59 | \$ 579,322 | 0.9% | \$ 1.39 | \$ 8,178,187 | 1.5% |
| Activities | \$ 1.05 | \$ 2,088,755 | 0.6% | \$ 0.80 | \$ 2,313,635 | 2.2% | \$ 0.82 | \$ 810,754 | 1.3% | \$ 0.89 | \$ 5,213,144 | 1.0% |
| Groceries/incidentals/ other | \$ 4.23 | \$ 8,455,483 | 2.3% | \$ 1.66 | \$ 4,813,874 | 4.6% | \$ 5.35 | \$ 5,284,472 | 8.2% | \$ 3.15 | \$ 18,553,830 | 3.4% |
| Total | \$ 185.80 | \$ 371,365,823 | 100.0% | \$ 36.21 | \$ 104,895,677 | 100.0% | \$ 65.50 | \$64,677,123 | 100.0% | \$ 91.95 | \$ 540,938,623 | 100.0% |
| Share | | 68.7% | | | 19.4% | | | 12.0% | | | 100.0% | |

COMPARATIVE VISITOR SPENDING BY CATEGORY BY LODGING SEGMENT 2011

Table 14b – Spending by Lodging Segment – 2011

| Spending Category | Hotel Visitors | | | Private Home/Other Overnight Visitors | | | Day Visitors | | |
|--------------------------|--------------------|----------------------|---------------|---------------------------------------|----------------------|---------------|--------------------|----------------------|---------------|
| | Spending | | Ratio | Spending | | Ratio | Spending | | Ratio |
| | Daily Per Capita * | Total Annual | | Daily Per Capita * | Total Annual | | Daily Per Capita * | Total Annual | |
| Lodging | \$ 57.04 | \$ 70,328,000 | 41.9% | \$ 3.41 | \$ 3,405,000 | 7.1% | \$ - | \$ - | 0.0% |
| Meals | \$ 37.12 | \$ 45,768,000 | 27.3% | \$ 18.37 | \$ 18,322,000 | 38.0% | \$ 11.34 | \$ 26,563,000 | 40.3% |
| Beverages | \$ 10.40 | \$ 12,822,000 | 7.6% | \$ 4.58 | \$ 4,572,000 | 9.5% | \$ 3.97 | \$ 9,294,000 | 14.1% |
| Shopping/gifts | \$ 25.29 | \$ 31,186,000 | 18.6% | \$ 16.13 | \$ 16,088,000 | 33.4% | \$ 8.37 | \$ 19,614,000 | 29.8% |
| Admissions (attractions) | \$ 1.03 | \$ 1,269,000 | 0.8% | \$ 0.05 | \$ 53,000 | 0.1% | \$ 0.14 | \$ 332,000 | 0.5% |
| Local Transport/parking | \$ 2.46 | \$ 3,029,000 | 1.8% | \$ 1.86 | \$ 1,855,000 | 3.9% | \$ 3.38 | \$ 7,907,000 | 12.0% |
| Amenities/health/spa | \$ 0.66 | \$ 811,000 | 0.5% | \$ 1.33 | \$ 1,330,000 | 2.8% | \$ 0.10 | \$ 228,000 | 0.3% |
| Activities | \$ 0.88 | \$ 1,088,000 | 0.6% | \$ - | \$ - | 0.0% | \$ 0.43 | \$ 1,008,000 | 1.5% |
| Groc./Conv./Incidentals | \$ 1.30 | \$ 1,603,000 | 1.0% | \$ 2.54 | \$ 2,532,000 | 5.3% | \$ 0.40 | \$ 940,000 | 1.4% |
| Total | \$ 136.17 | \$167,904,000 | 100.0% | \$ 48.29 | \$ 48,157,000 | 100.0% | \$ 28.13 | \$ 65,886,000 | 100.0% |
| Share | | 59.6% | | | 17.1% | | | 23.4% | |

* Spending is for all visitors whether or not they spent in a specific category. Includes taxes and tips.

VISITOR INDIRECT & INDUCED SPENDING ADDED \$162 MILLION TO HB ECONOMY

- In addition to the \$540.9 (\$281.9) million of direct visitor spending, additional indirect and induced impacts benefit the Huntington Beach economy:
 - *indirect* benefits accrue to sectors providing goods and services as inputs into production such as food wholesalers, utilities, and financial or legal services
 - *induced* impacts are generated by employees whose incomes are driven directly or indirectly by tourism, and spend that income in the local regional economy.
 - the impact multiplier is 1.3 times direct spending.
- Huntington Beach's indirect and induced benefits impacts add another \$162.1 (\$84.6) million to the economy for total impact of \$703 (\$366.5) million.

Table 15 – Total Visitor Direct, Indirect and Induced Spending Impacts *

| | 2018 | 2011 |
|--|-----------------------|----------------------|
| Direct spending | \$ 540,900,000 | \$ 281,900,000 |
| Multiplier (indirect & induced impacts) | 1.3 | 1.3 |
| Additional Impacts | <u>\$ 162,100,000</u> | <u>\$ 84,600,000</u> |
| Total Direct, Indirect & induced Economic Impacts * | \$ 703,000,000 | \$366,500,000 |

* excludes second home-owner impacts

Source: Tourism Economics, CIC Research, Inc., and Lauren Schlau Consulting

INTERNATIONAL VERSUS DOMESTIC VISITATION & SPENDING

Table 16 – International and Domestic Visitation

| | HB Inter- national | HB Domestic | All HB Visitors |
|----------------------------------|-----------------------|-------------------------|-------------------------|
| Day Visitor Volume | 297,523 | 2,599,414 | 2,896,937 |
| Overnight Visitor Volume | <u>125,691</u> | <u>720,782</u> | <u>846,473</u> |
| Total Estimated Visitors | 423,214 | 3,320,196 | 3,743,410 |
| Share of Total Visitors | 11.3% | 88.7% | 100.0% |
| Share Overnight in HB | 29.7% | 21.7% | 22.6% |
| Day Visitor (visitor days) | 297,523 | 2,599,414 | 2,896,937 |
| Overnight Visitor Days | 557,177 | 2,428,968 | 2,986,145 |
| Total Visitor Days | <u>854,701</u> | <u>5,028,381</u> | <u>5,883,082</u> |
| Share of Total Visitor Days | 14.5% | 85.5% | 100.0% |
| Avg. Days (overnight) | 4.43 | 3.37 | 3.53 |
| Avg. Days in H.B. (all visitors) | 2.02 | 1.51 | 1.57 |
| Spending Per Visitor Day | \$ 117.28 | \$ 116.51 | \$ 91.95 |
| Total Spending | \$99,581,800 | \$441,356,900 | \$540,938,700 |
| Share of Total Spending | 18.4% | 81.6% | 100.0% |
| Average Travel Group Size | 2.86 | 2.91 | 2.90 |

- Of the 3.7 (2.9) million total Huntington Beach visitors, 3.3 (2.7) million 89% (91%) were U.S. residents and 423,200 (259,100) 11% (9%) were from other countries. Clearly the destination is heavily U.S. visitor based, but International volume and share grew in 2018 from 2011.
- However, as 30% (39%) of International versus 22% (18%) of U.S. visitors stayed overnight in HB, they had a higher share of visitor days relative to their volume, 15%(14%), while U.S. visitors accounted for 86% (86%) of visitor days.
- And because International visitors slightly outspent U.S. visitors, \$117 (\$75) versus \$117 (\$59) per day respectively, their share of total spending was 18% (18%) versus 82% (82%) for U.S. visitors.
- In total, International visitors spent nearly \$100 (\$50) million but far less than the \$441 (\$232) million by U.S. visitors.

VISITORS GENERATED \$16 MILLION OF TAX TO CITY OF HUNTINGTON BEACH

Visitor spending generates taxes directly to the City of Huntington Beach (and the county and state).

- The City's general fund earns all of the 10% "transient occupancy" (lodging) tax * and one percentage point of 7.75% levied on taxable retail items, meals, beverages, and on a portion of groceries and local transportation.
- In 2018 the City received an estimated \$8.2 million in taxes from \$232.1 million of *taxable* visitor spending for lodging and retail items.
 - Of these taxes attributable to direct visitor spending, nearly \$6.6 million was lodging tax and \$1.7 million was retail sales tax.
- Thus, for Huntington Beach's 74,291 households, visitors contributed the equivalent of \$110 per household in taxes to the City general fund used to deliver services and programs to residents.

Table 17 – Visitor Direct Spending Taxes Generated to City of Huntington Beach

| Taxable Category | Taxable Total Spending | Huntington Beach Tax Revenues | Ratio |
|------------------------------------|------------------------|-------------------------------|---------------|
| Lodging | \$ 131,441,133 * | \$ 13,144,113 * | 81.5% |
| Meals | \$ 146,506,985 | \$ 1,465,070 | 9.1% |
| Beverages | \$ 52,225,642 | \$ 522,256 | 3.2% |
| Shopping/gifts | \$ 82,800,103 | \$ 828,001 | 5.1% |
| Local Transportation | \$ 6,079,037 | \$ 60,790 | 0.4% |
| Spa/Beauty/Health Club | \$ 1,897,491 | \$ 18,975 | 0.1% |
| Groceries/incidentals/Other | \$ 8,609,666 | \$ 86,097 | 0.5% |
| Total | \$ 429,560,057 | \$ 16,125,302 | 100.0% |
| Retail Only (excl. lodging) | \$ 298,118,924 | \$ 2,981,189 | 18.5% |

* lodging revenue excludes 3% of tourism marketing district assessment revenues

Note: Activities and admissions are non-taxable and excluded from the calculation

TOURISM SUPPORTED NEARLY 4,500 LOCAL JOBS

Visitor spending supports local employment which are estimated from visitor spending *net* of taxes and tips, and the level of spending that supports one full-time equivalent position (by category).

- Of the \$540.9 (\$261.9) million of total direct visitor spending, \$484.8 (\$250.4) million was *net spending*.
- Net visitor spending is estimated to support 4,479 (2,721) Huntington Beach jobs. The city has a reported 84,151 (75,675) jobs; thus tourism supports 5.3% (3.6%) of the citywide workforce.²
- The top employment categories are:
 - 2,046 (1,284) or 48% (47%) of jobs in eating and drinking outlets (combined meals and beverages)
 - 1,515 (852) or 34% (31%) of jobs in paid lodging accommodations
 - 262 (263) or 6% (10%) of jobs in retail outlets related to visitor shopping expenditures

Table 18 – Huntington Beach Employment Supported by Net Visitor Spending

| Taxable Category | Net Sales by Sector (no taxes/tips) | Visitor Spending to Support One Job ¹ | Direct Tourism Jobs | Ratio Total Tourism Jobs |
|-----------------------------|--|---|------------------------|-----------------------------|
| Lodging | \$ 140,296,786 | \$ 92,601 | 1,515 | 33.8% |
| Meals | \$ 146,506,985 | \$ 92,601 | 1,582 | 35.3% |
| Beverages | \$ 52,225,642 | \$ 92,601 | 564 | 12.6% |
| Shopping/gifts | \$ 82,800,103 | \$ 316,602 | 262 | 5.8% |
| Attractions/ Admissions | \$ 10,493,909 | \$ 59,012 | 178 | 4.0% |
| Local Transportation | \$ 21,362,749 | \$ 143,413 | 149 | 3.3% |
| Spa/Beauty/Health Club | \$ 8,031,131 | \$ 94,687 | 85 | 1.9% |
| Activities | \$ 5,213,144 | \$ 59,012 | 88 | 2.0% |
| Groceries/incidentals/Other | \$ 17,886,581 | \$ 316,602 | 56 | 1.3% |
| Total | \$ 484,817,031 | \$ 108,200 | 4,479 | 100.0% |

¹ Source: Visit California; Dean Runyan Assoc., California Travel Impacts by County 2018, May 2019

² Southern California Association of Governments – Huntington Beach City Profile, 2018, 2011.

SECTION 3

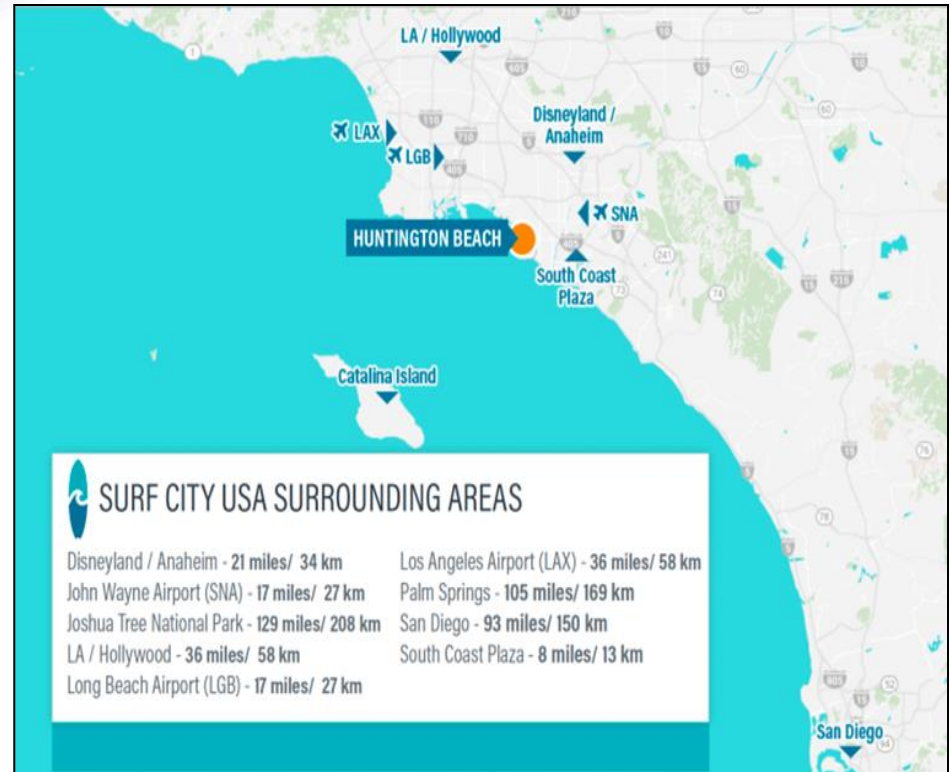
Huntington Beach Visitor Environment

- **Location**
- **Offerings and Brand**
- **Lodging**
- **Attractions and Amenities**
- **Infrastructure/Airport**

HUNTINGTON BEACH – CENTRAL ORANGE Co. COAST LOCATION

- Huntington Beach is located along Southern California's scenic and popular Orange County "OC" coast.
- Adjacent to the south is the "luxury" resort Newport Beach and further south by the quaint arts oriented Laguna Beach.
 - The city is about a 60 minute drive south of Los Angeles and 90 minutes north of San Diego.
 - It is accessible and about an equidistant 30 minute drive to John Wayne/Orange County airport and Long Beach airport, with LAX 45-60 minutes up the coast.
- Nearby and easily accessible are Anaheim and famed Disneyland Resort, Long Beach featuring the Queen Mary and Aquarium of the Pacific, and Costa Mesa, home of the South Coast Plaza luxury retail center and Segerstrom Performing Arts Complex.

Huntington Beach Location



QUINTESSENTIAL BEACH CULTURE BRAND POSITION & OFFERINGS

- Huntington Beach is characterized as the ultimate Southern California beach city; its ten miles of beach frontage along the Orange County coast define the city, the brand and the visitor experience.
- The California beach culture and vibe so identified with the state remain relevant: casual and cool, with trendsetting West Coast fashion, food and lifestyle.
- Known for the most consistent waves on the west coast, the destination earned the moniker of “Surf City USA.” This brand has positioned the city as the place for all things surf and beach related.
 - The U S Open of Surfing, held on the city’s main beach each August, attracts surfers and thousands of spectators and million by media from around the world.
- Local venues popular among visitors include the 1,800 foot Huntington Beach Pier, Main Street and downtown area for shopping, eating, drinking, and entertainment, and Pier Plaza for arts and events.



HUNTINGTON BEACH OFFERS AN ARRAY OF VISITOR ATTRACTIONS & VENUES

- Huntington Beach offers an array of amenities centered around the Pacific Ocean and the city's 10 mile coastline including Huntington City Beach/Dog Beach across from downtown; Huntington State Beach, the southernmost beach, and Bolsa Chica State Beach on the north.
- Other key assets are the 880 acre Bolsa Chica Ecological Reserve wetlands where visitors can observe natural wildlife and plant habitat, Talbert Wetlands, and Shipley Nature Center in the city's Central Park, where visitors engage in outdoor activities including equestrian, fishing and golf.
- Much of the city's visitor activity is centered in or adjacent to the walkable downtown area:
 - Main Street features an array of shops, eating and drinking places and entertainment, which retains much of the original surf culture vibe and look
 - Fifth Street features newer hotels, retail, and dining amenities
 - Just south along Pacific Coast Highway are high rise hotels, spas and Pacific City retail/dining center
- Directly across Coast Highway from downtown and beach adjacent is the iconic 1,800 foot Huntington Beach Pier fronted by the popular VHB Visitor Kiosk.
- On the north side of town are other visitor oriented retail venues Bella Terra and 5 Points Plaza.
- Beach casual to fine-dine restaurants throughout the city form a growing culinary scene
- Cultural venues include Huntington Beach Art Center, International Surfing Museum, Surfing Walk of Fame and Surfers' Hall of Fame.
- Various special events attract visitors year-round including the U.S. Open of Surfing, Surf City U.S.A. Marathon, AVP Beach Volleyball, and Great Pacific Airshow, among others.

HUNTINGTON BEACH LODGING MARKET - SUPPLY

The Huntington Beach lodging market is discussed below with a census of its transient lodging properties presented on the next slide.

- For 2018 Huntington Beach contained a total of 2,468 (1,826) rooms in 23 (17) tourist quality transient hotels, motels and inns.
 - On an annualized basis, Huntington Beach hotels offer 900,820 rooms a 35% increase from the 666,490 annual available rooms in 2011.
- Huntington Beach is part of the greater Orange County lodging market that contained 16.6 million annual rooms in 2018. Therefore, Huntington Beach's supply comprises 5.4% of the countywide room inventory.
- Huntington Beach is located within the Orange County Coastal hotel submarket encompassing the beach communities from Huntington Beach to San Juan Capistrano. With a total of 2.12 million annual rooms in 2018, Huntington Beach's 900,820 annual rooms comprised 42% of the coastal submarket.

¹ Southern California Lodging Forecast, 2012, 2018, CBRE (formerly PKF)

HUNTINGTON BEACH OFFERS HOTEL AND OTHER LODGING ACROSS TIERS

Hotel/Motel Sector

- The hotel lodging supply is divided into three tiers as discussed below and shown in the table on the next slide.
 - **First Class**, contains 4 (3) hotels with 1,362 (964) available rooms. They offer a full range of high-quality services, meeting space and amenities with nightly room rates from \$200 up.
 - **Mid-Level**, with 11 (7) properties and 853 (623) rooms, offering medium levels of service and room rates averaging \$120 - \$200 per night.
 - **Value**, with 8 (7) properties totaling 253 (239) rooms, much smaller in size and offering basic services, with nightly rates from about \$80 – \$120.

Other Paid Lodging Sector

- In addition to hotels Huntington Beach offers other types of overnight lodging:
 - **short term rentals**: in 2018 an average of 400 units or rooms per month were available for transient occupancy by visitors *
 - **vacation homes/townhouses/condos**: while we do not have the supply for this sector, a small share of visitors indicated using such lodging in the intercept survey
 - **recreational vehicle spaces**: the City and state beaches as well as private providers offer RV spaces during the year but not all are available year-round. Our research indicated that on average 170 RV spaces were available for rental on a daily basis

* As per AirDNA and Visit Huntington Beach

HUNTINGTON BEACH OFFERS LODGING ACROSS TIERS

Table 19 – Huntington Beach Transient Lodging Census

| First-Class (4) | | Mid-Level (11) | | Value (8) | |
|---|--------------|-----------------------------------|------------|--------------------|------------|
| Property | Rooms | Property | Rooms | Property | Rooms |
| Hilton Waterfront Beach Resort - Hilton Hotel | 437 | Springhill Suites - Marriott | 127 | Beach Inn Motel | 38 |
| Hyatt Regency Huntington Beach Resort & Spa | 517 | Best Western Surf City | 62 | Huntington Suites | 66 |
| Kimpton Shorebreak Resort | 158 | Huntington Beach Inn | 50 | Oceanview Motel | 29 |
| Paséa Hotel & Spa | <u>250</u> | Best Western Harbour Inn & Suites | 25 | Surf City Inn | 20 |
| Total First Class | 1,362 | Comfort Suites Huntington Beach | 106 | Starlight Inn | 36 |
| | | Extended Stay America | 104 | Sun N' Sands Motel | 17 |
| | | The Hotel Huntington Beach | 224 | 777 Motor Inn | 35 |
| | | Quality Inn & Suites | 65 | Hotel Europa | <u>12</u> |
| | | Huntington Surf Inn | 9 | Total Value | 253 |
| | | Ocean Surf Inn & Suites | 31 | | |
| | | Travelodge Ocean Front | <u>50</u> | | |
| | | Total Mid-Level | 853 | | |

THE CITY OFFERS A RANGE OF MEETING SPACE

- More than 171,000 square feet of meeting and event space is available hotels and other private venues in Huntington Beach, as shown below.
- The city's four largest hotels have about 160,000 total square feet of public event space.
 - The single largest space by far is the 20,000 square foot ballroom in the Hyatt Regency.
- In addition to those listed are rooms in hotels and in other venues including the Huntington Beach Art Center, the historic Newland House, the Public Library and private clubs that accommodate a range of business, civic and social events.

Table 20 – Lodging Market Meeting and Event Space

| Venue | Number of Rooms (interior) | Total Square Footage | Largest Ballroom (sq. ft.) |
|--------------------------------------|----------------------------|----------------------|----------------------------|
| Hyatt Regency Huntington Beach Hotel | 19 | 100,000 | 20,000 |
| Hilton Waterfront Beachfront Resort | 15 | 32,000 | 5,800 |
| Kimpton Shorebreak Hotel | 7 | 8,000 | 3,000 |
| Paséa Hotel & Spa | 7 | 21,100 | 8,400 |
| Old World | 6 | 5,000 | 2,200 |
| SeaCliff Country Club | 3 | 6,800 | 3,600 |
| Meadowlark Country Club | 1 | n/a | 2,886 |

HOTEL MARKET DEMAND AND RATE SUMMARY

Lodging Demand

- As mentioned, 2018 annualized hotel/motel lodging market supply totaled 900,820 rooms, a 35% rise from 666,490 in 2011.
- Analysis of hotel operating data¹ reveals that the market achieved an overall occupancy rate of 74.3% in 2018 versus 66.9%, in 2011.
- Therefore, demand totaled 669,304 occupied rooms, versus 445,847 rooms in 2011, a 50% rise indicating real growth driven by demand over the period.
- By quarter not surprisingly demand peaked in summer (Q3) with 83.8% (79.4%) occupancy, while was lowest in fall (Q4) at 66.9% (54.8%). Spring (Q2) at 77.8% (71.0%) leaped from winter (Q1) at 68.6% (62.4%), likely driven by corporate (versus leisure) demand.

Table 21a – 2018 Quarterly Hotel Demand

| 2018 | Q1 | Q2 | Q3 | Q4 | Annual |
|------------------|---------|---------|---------|---------|---------|
| Quarterly Supply | 222,120 | 224,588 | 227,056 | 227,056 | 900,820 |
| Occupancy | 68.6% | 77.8% | 83.8% | 66.9% | 74.3% |
| Qtr. Demand | 152,446 | 174,678 | 190,301 | 151,878 | 669,304 |

Room Rate

- The overall market average daily room (ADR) rate reached \$210 in 2018, a 39% rise from \$151 in 2011.
- Again not surprisingly and like occupancy, room rate was highest in summer (Q3) at \$243 (\$171), well above the other quarters. Lowest ADR was in winter (Q1) at \$190 (\$143), with fall (Q4) at \$195 (\$139) and then spring (Q2) at \$207 (\$145).
- These rates combined with room demand resulted in 2018 total hotel room revenue of \$140.7 (\$67.3) million, a 109% increase since 2011, indicating that revenue was rate driven.

Table 21b – 2018 Quarterly Room Rate

| 2018 | Q1 | Q2 | Q3 | Q4 | Annual |
|-----------------------|-----------|-----------|-----------|-----------|-----------|
| ADR | \$ 189.61 | \$ 206.63 | \$ 242.52 | \$ 194.61 | \$ 210.23 |
| Room Revenue (\$mill) | \$ 28.9 | \$36.1 | \$ 46.2 | \$ 29.6 | \$ 140.7 |
| REVPAR | \$ 130.14 | \$ 160.71 | \$ 203.26 | \$ 130.18 | \$ 156.20 |

¹ Source: actual aggregated monthly occupancy and rate data supplied by the hotels to STR, provided by Visit Huntington Beach.

NEARBY JOHN WAYNE /ORANGE COUNTY AIRPORT SERVES THE DESTINATION

- John Wayne/Orange County Airport (SNA) is the closest to Huntington Beach, although LAX and Long Beach airports also generate passenger volume to the area.
- SNA is served by 10 airlines to 22 non-stop markets, most in the west, but several in the mid-west and east and since 2011 has been serving international markets.
- In 2018, SNA airport volume reached 10.66 million passengers, up by 24% from 8.6 million in 2011. Note the airport is nearing its annual negotiated passenger cap of 10.8 million until 2021 when the cap is lifted to 11.8 million.
- The airport underwent a major renovation that in 2011 and 2016 added new terminals gates and commuter terminals, parking and passenger services. As expected that and the new routes increased air demand to the airport and to the Orange County region.

Table 22 - John Wayne/Orange County Airport Passenger Volume

| | 2018 | 2011 | % change |
|---------------------|------------|-----------|----------|
| Total passengers | 10,664,038 | 8,609,008 | 23.9% |
| Enplaned passengers | 5,317,149 | 4,287,955 | 24.0% |
| Deplaned passengers | 5,346,889 | 4,321,053 | 23.7% |

Source: John Wayne Airport Facts at a Glance, 2018

SECTION 5

Profile of Visitor Behavior & Trip Characteristics

ANALYSIS BASED ON ON-SITE VISITOR INTERVIEWS

- Visitor characteristics and visitor behaviors impact the economic indicators which are used to measure Huntington Beach's viability as a visitor destination.
- The responses from visitor groups interviewed by the intercept survey provide the bases for visitors' behavioral and demographic profile, as well as for the economic model that estimates visitor volume and economic and fiscal impacts.
- In this section, each survey question is summarized with an accompanying table. The questions relate to visitors' trip planning, actions/ activities and spending while in Huntington Beach, and demographics.

SECTION 5a

Visitor Origin

OVER HALF CAME FROM CALIFORNIA

- Overall, 56% (55%) of Huntington Beach visitors were Californians, with 33% (36%) from other U.S. areas, and 11% (9%) of international origin.
 - Thus visitation shifted slightly to International, from longer-haul U.S. origin since 2011, yet maintaining a majority of Californians.
- Of note, 55% (58%) of Huntington Beach Hotel guests were from Other U.S. areas, as were 54% (73%) of travelers here for business or a meeting.
- Californians dominate those engaged in action sports and Day visitors, at 63% each.
- Of those here for luxury/leisure, 18% were International as were 16% (20%) of Hotel guests both segments above their share of the total.

Table 23 – Visitor Origin

| | Total | Activity Type | | HB Lodging | | | Family Tvlr | Biz/Mtg |
|---------------------------------|-------------|----------------|-----------------|------------|---------------|------------|----------------|------------|
| | | Act. Sports | Lux. Leisure | Hot/Mot | Other Paid | Day Vis | | |
| Base: Visitor | 1511 | 360 | 459 | 382 | 150 | 775 | 444 | 113 |
| California | 56.0% | 62.7% | 46.2% | 29.3% | 64.3% | 62.9% | 52.6% | 38.1% |
| Other United States (excl. Cal) | 32.7% | 22.7% | 35.9% | 54.5% | 30.4% | 26.8% | 36.7% | 54.8% |
| Another country | 11.3% | 14.6% | 17.9% | 16.2% | 5.3% | 10.3% | 10.8% | 7.2% |

CALIFORNIA TOP US FEEDER STATE

- Of U.S. feeders California was top with 63% (60%), with a dramatic drop to the next states, Utah with 4% (5%) and both Nevada at 3% (3%) and Arizona with 3% (11%).
- The top 10 states accounted for 83% (89%) of total US visitation, suggesting a little more geographic diversity since 2011.

Table 24 – Top States of Origin for US Visitors

| | Total | Activity Type | | HB Lodging | | | Family Tvlr | Biz/Mtg |
|-----------------------------|--------------|----------------|-----------------|--------------|---------------|--------------|----------------|--------------|
| | | Act. Sports | Lux. Leisure | Hot/Mot | Other Paid | Day Vis | | |
| Base: U.S. Residents | 1320 | 303 | 379 | 326 | 127 | 692 | 388 | 106 |
| California | 63.1% | 73.4% | 56.3% | 35.0% | 67.9% | 70.1% | 58.9% | 41.0% |
| Utah | 3.7% | 2.2% | 6.5% | 3.3% | 1.2% | 4.0% | 5.3% | 1.2% |
| Nevada | 3.3% | 2.6% | 3.0% | 9.2% | 2.4% | 2.1% | 4.3% | 4.9% |
| Arizona | 3.1% | 1.1% | 3.4% | 5.9% | 3.5% | 2.4% | 3.1% | 4.6% |
| Washington | 2.6% | 3.7% | 5.4% | 5.5% | 0.1% | 2.0% | 2.8% | 1.0% |
| Colorado | 2.4% | 1.7% | 3.2% | 3.6% | 0.0% | 2.0% | 3.2% | 3.5% |
| Texas | 1.5% | 1.1% | 2.0% | 5.1% | 0.1% | 0.6% | 1.1% | 6.4% |
| Illinois | 1.2% | 0.6% | 1.4% | 1.8% | 0.2% | 1.0% | 1.6% | 1.0% |
| New York | 1.2% | 1.7% | 0.9% | 2.5% | 1.2% | 0.8% | 1.1% | 0.3% |
| Florida | 1.2% | 1.9% | 1.1% | 5.4% | 0.1% | 0.4% | 1.5% | 1.7% |
| Top Ten States | 83.3% | 90.0% | 83.2% | 77.3% | 76.7% | 85.4% | 82.9% | 65.6% |

OVER HALF OF CALIFORNIANS CAME FROM LOS ANGELES AREA

- Specific California origin markets show greater Los Angeles first with 53% (54%) of which 36% (32%) was from Central LA and 17% (22%) from LA Valley areas, followed by the Inland Empire with 29% (34%).
 - Thus, including San Diego and Palm Springs, a consistent 56% in 2018 versus 57% 2011 of California visitation share was from Southern California.
- For Other California, Sacramento accounted for a notable 29%.

Table 25 – Top California Feeder Markets

| | Total | Residence | | Activity Type | | HB Lodging | | | Family Tvlr | Biz/Mtg |
|-----------------------------------|------------|------------|------------|---------------|--------------|------------|------------|------------|-------------|-----------|
| | | So. CA | Other CA | Act. Sports | Lux. Leisure | Hot/Mot | Other Paid | Day Vis | | |
| Base: CA Residents | 733 | 622 | 111 | 175 | 181 | 106 | 72 | 481 | 211 | 35 |
| Central LA | 36.0% | 41.4% | 0.0% | 28.3% | 29.4% | 18.4% | 18.8% | 38.3% | 30.2% | 39.5% |
| San Bernardino-Riverside | 29.3% | 33.7% | 0.0% | 34.7% | 36.2% | 25.3% | 56.8% | 29.5% | 30.4% | 37.6% |
| LA Valley Areas | 17.4% | 20.0% | 0.0% | 18.9% | 13.0% | 9.9% | 12.6% | 18.2% | 15.7% | 7.2% |
| San Diego | 3.9% | 4.5% | 0.0% | 3.5% | 3.0% | 6.3% | 4.0% | 3.6% | 4.0% | 3.7% |
| Sacramento Area | 3.7% | 0.0% | 28.6% | 5.2% | 3.2% | 6.9% | 2.8% | 3.4% | 7.4% | 0.9% |
| Oakland/ East Bay | 2.3% | 0.0% | 17.3% | 3.2% | 4.4% | 6.3% | 0.4% | 1.9% | 3.1% | 6.3% |
| San Joaquin Valley/Stockton | 1.8% | 0.0% | 13.9% | 0.4% | 1.0% | 4.1% | 0.4% | 1.6% | 1.8% | 0.9% |
| Bakersfield/ Mojave | 1.8% | 0.0% | 13.7% | 0.6% | 2.6% | 5.8% | 0.0% | 1.4% | 2.9% | 2.6% |
| San Francisco | 1.3% | 0.0% | 9.8% | 2.4% | 2.2% | 4.9% | 0.1% | 0.9% | 2.2% | 0.0% |
| Montry/Sta Cruz/Sn Jose/Palo Alto | 0.9% | 0.0% | 7.0% | 0.6% | 2.4% | 6.0% | 0.0% | 0.2% | 1.2% | 0.0% |
| Central Coast | 0.8% | 0.0% | 6.1% | 0.9% | 0.5% | 3.3% | 4.1% | 0.4% | 0.7% | 0.5% |
| Northern California | 0.5% | 0.0% | 3.6% | 0.1% | 0.8% | 2.7% | 0.0% | 0.2% | 0.4% | 0.9% |
| Palm Springs | 0.3% | 0.4% | 0.0% | 1.4% | 1.3% | 0.0% | 0.0% | 0.4% | 0.0% | 0.0% |

CANADA & EUROPE TOP INTERNATIONAL MARKETS; GROWTH FROM ASIA

- Of International visitors, just 18% in 2018 versus 47% in 2011 were Canadian, with 13% (31%) from Western and 5% (16%) from Eastern Canada, notable decreases.
- Another 29% (40%) of international visitors were European, of which 8% (18%) were from the UK, 13% (12%) from Western Europe and 9% (10%) from Central & Eastern Europe.
- Asia at 11% (n/a) appears to be the big growth area of HB international visitation.

Table 26 – International Origin

| | Total | Activity Type | | HB Lodging | | | Family Tvlr | Biz/Mtg |
|---|------------|---------------|--------------|------------|------------|-----------|-------------|----------|
| | | Act. Sports | Lux. Leisure | Hot/Mot | Other Paid | Day Vis | | |
| Base: Non-U.S. Residents | 191 | 57 | 80 | 56 | 23 | 83 | 56 | 7 |
| Europe: Western (excl. UK) | 12.6% | 9.0% | 17.7% | 14.9% | 26.9% | 11.8% | 13.1% | 61.1% |
| Canada - Western | 12.5% | 1.9% | 9.0% | 9.5% | 0.7% | 14.0% | 16.0% | 0.0% |
| Asia | 10.9% | 4.9% | 3.4% | 7.5% | 12.4% | 12.7% | 8.4% | 0.0% |
| Europe: Central and Eastern | 8.8% | 8.5% | 4.4% | 8.5% | 1.4% | 8.8% | 4.2% | 2.9% |
| Utd. Kingdom | 7.7% | 2.2% | 8.2% | 7.5% | 20.7% | 7.5% | 9.5% | 0.0% |
| South America | 7.1% | 16.4% | 7.6% | 2.5% | 0.0% | 8.8% | 10.4% | 0.0% |
| Central America | 5.5% | 7.3% | 10.1% | 4.5% | 2.1% | 6.1% | 8.6% | 0.0% |
| Australia/ New Zealand | 5.2% | 4.4% | 5.2% | 5.0% | 23.4% | 4.8% | 1.7% | 22.4% |
| Mexico | 4.9% | 5.9% | 3.3% | 3.0% | 2.8% | 5.3% | 10.5% | 0.0% |
| Canada - Eastern | 4.7% | 5.8% | 7.9% | 7.0% | 0.0% | 3.9% | 2.8% | 9.1% |
| Middle East | 3.7% | 2.8% | 4.9% | 3.5% | 0.0% | 3.5% | 4.7% | 0.0% |
| Scandinavia (Den, Finl, Icel, Nor, Swe) | 2.1% | 2.9% | 3.7% | 2.0% | 3.5% | 2.2% | 2.3% | 0.0% |
| Africa continent | 1.7% | 6.5% | 3.3% | 0.5% | 0.0% | 2.2% | 0.0% | 0.0% |
| All Other (any not listed above) | 12.7% | 21.5% | 11.1% | 24.4% | 6.2% | 8.3% | 7.8% | 4.5% |

SECTION 5b

- Visitor Behaviors and Characteristics on Huntington Beach Trip

HIGH REPEAT VISITATION SHARE AND NUMBER OF REPEAT TRIPS

- In the last three years nearly two-thirds or 64% (53%) had visited Huntington Beach, thus 36% (47%) were on their first trip, indicating a shift to repeat visitation versus 2011.
- By residence, 84% (75%) of Californians, 54% (28%) of Other U.S., and a surprising 38% (19%) of International visitors had been to Huntington Beach in the past three years.
- As well, repeaters came here more often in 2018 averaging 12 trips, versus 9 in 2011 or about 4 (3) times per year (over the past three years).

Table 27 – Prior or First Time Visitation

| Have visited in the past three years | Total | Residence | | | | Activity Type | | HB Lodging | | | Family Tvlr | Biz/Mtg |
|--------------------------------------|--------------|--------------|-------------|-------------|-------------|---------------|--------------|-------------|-------------|--------------|--------------|--------------|
| | | So. CA | Other CA | U.S. | Int'l | Act. Sports | Lux. Leisure | Hot/Mot | Other Paid | Day Vis | | |
| Base: | 1511 | 622 | 111 | 587 | 191 | 360 | 459 | 382 | 150 | 775 | 444 | 113 |
| Yes | 64.3% | 84.0% | 53.8% | 46.4% | 37.9% | 73.7% | 63.0% | 58.1% | 68.2% | 65.1% | 62.7% | 49.5% |
| No | 35.7% | 16.0% | 46.2% | 53.6% | 62.1% | 26.3% | 37.0% | 41.9% | 31.8% | 34.9% | 37.3% | 50.5% |
| Base: Visited Before/Trips | 969 | 531 | 62 | 295 | 81 | 245 | 290 | 216 | 94 | 509 | 283 | 61 |
| 1 time | 11.2% | 6.8% | 11.0% | 20.6% | 19.6% | 4.7% | 9.2% | 9.4% | 4.7% | 11.8% | 9.7% | 10.5% |
| 2 times | 15.0% | 9.1% | 23.1% | 24.7% | 29.1% | 13.9% | 15.4% | 27.6% | 15.6% | 12.7% | 18.3% | 8.8% |
| 3-4 times | 17.8% | 12.7% | 16.1% | 29.3% | 27.0% | 20.5% | 19.5% | 24.0% | 9.4% | 16.5% | 14.4% | 12.9% |
| 5-6 times | 15.0% | 16.5% | 14.8% | 11.4% | 13.4% | 17.5% | 17.1% | 14.8% | 32.9% | 14.9% | 14.9% | 14.5% |
| 7-12 times | 16.2% | 20.3% | 13.5% | 8.5% | 6.5% | 19.9% | 16.9% | 12.5% | 20.6% | 16.8% | 19.4% | 16.0% |
| 13+ times | 24.9% | 34.5% | 21.5% | 5.4% | 4.4% | 23.6% | 21.8% | 11.8% | 16.8% | 27.2% | 23.2% | 37.3% |
| Mean (all visitors): | 7.74 | 16.88 | 3.18 | 1.69 | 1.27 | 8.91 | 5.81 | 3.04 | 5.38 | 8.83 | 6.32 | 9.09 |
| Mean (repeat visitors): | 12.04 | 20.10 | 5.90 | 3.66 | 3.36 | 12.09 | 9.23 | 5.23 | 7.90 | 13.56 | 10.08 | 18.37 |

MOST VISITORS HIGHLY SATISFIED

- Visitors across the board were highly satisfied with Huntington Beach as a visitor destination. The vast majority, 90% (87%), were either “Extremely” or “Very Satisfied” with Huntington Beach as a destination.
- Across all visitor segments, the mean satisfaction rating was 4.37 (4.25) or “Very Satisfied.”
- While all ratings were well above 4.00, the most satisfied were Other Californians rating the destination at 4.50 (4.34), while those on business rated it lowest at 4.28 still in the “very satisfied” range.

Table 28 – Destination Satisfaction

| | Total | Residence | | | | Activity Type | | HB Lodging | | | Family Tvlr | Biz/Mtg |
|------------------------------------|--------------|--------------|--------------|--------------|--------------|----------------|-----------------|--------------|---------------|--------------|----------------|--------------|
| | | So. CA | Other CA | U.S. | Int'l | Act. Sports | Lux. Leisure | Hot/Mot | Other Paid | Day Vis | | |
| Base: | 1511 | 622 | 111 | 587 | 191 | 360 | 459 | 382 | 150 | 775 | 444 | 113 |
| 5- Extremely satisfied | 48.1% | 46.1% | 55.6% | 50.8% | 44.5% | 50.1% | 52.1% | 50.6% | 58.2% | 46.8% | 47.9% | 43.7% |
| 4 - Very satisfied | 41.8% | 42.6% | 40.6% | 39.1% | 47.1% | 39.3% | 37.8% | 38.3% | 33.3% | 43.2% | 43.9% | 40.8% |
| Extremely + Very Satisfied: | 90.0% | 88.7% | 96.2% | 89.9% | 91.6% | 89.4% | 89.9% | 89.0% | 91.5% | 90.0% | 91.8% | 84.5% |
| 3 - Somewhat satisfied | 8.8% | 10.0% | 2.8% | 9.2% | 5.9% | 10.0% | 8.4% | 9.4% | 1.9% | 8.9% | 6.6% | 15.1% |
| 2 - Somewhat unsatisfied | 0.4% | 0.1% | 0.0% | 0.4% | 1.5% | 0.6% | 0.2% | 0.0% | 0.1% | 0.5% | 0.5% | 0.0% |
| 1 - Very unsatisfied | 0.5% | 0.7% | 1.0% | 0.2% | 0.0% | 0.0% | 1.1% | 0.6% | 5.3% | 0.3% | 0.5% | 0.0% |
| DK/Refused | 0.4% | 0.4% | 0.0% | 0.3% | 1.0% | 0.0% | 0.3% | 1.0% | 1.1% | 0.3% | 0.5% | 0.3% |
| Mean rating (5 → 1): | 4.37 | 4.33 | 4.50 | 4.40 | 4.35 | 4.39 | 4.40 | 4.38 | 4.39 | 4.36 | 4.38 | 4.28 |

VISITORS LIKE THE BEACHES AND WEATHER/CLIMATE

- The top reasons for being highly satisfied with Huntington Beach were: good/great beaches by 47% (30%), the location by 44% (29%), great weather/climate by 40% (14%), the general environment and ambiance by 31% (14%) and pleasant walking area also by 31% (3%), all rated so well above levels in 2011.

Table 29 –Why Highly Satisfied

| | Total | Residence | | | | Activity Type | | HB Lodging | | | Family Tvlr | Biz/Mtg |
|--------------------------------|-------------|------------|------------|------------|------------|---------------|--------------|------------|------------|------------|-------------|------------|
| | | So. CA | Other CA | U.S. | Int'l | Act. Sports | Lux. Leisure | Hot/Mot | Other Paid | Day Vis | | |
| Valid Base: Satisfied | 1487 | 613 | 109 | 579 | 186 | 357 | 453 | 376 | 144 | 766 | 437 | 110 |
| Good/great beaches | 47.1% | 49.4% | 39.4% | 43.3% | 53.3% | 53.8% | 46.8% | 51.0% | 34.1% | 45.9% | 45.2% | 52.1% |
| Great/like the location | 43.6% | 45.6% | 41.4% | 42.5% | 39.3% | 44.2% | 46.3% | 44.2% | 48.7% | 43.1% | 44.8% | 36.2% |
| Great weather/climate | 39.5% | 36.6% | 41.0% | 41.7% | 44.4% | 43.1% | 46.4% | 50.0% | 18.0% | 36.4% | 39.3% | 48.1% |
| Great environment/ambiance | 31.4% | 35.4% | 16.7% | 28.6% | 32.4% | 35.2% | 34.8% | 35.5% | 22.9% | 30.4% | 27.7% | 32.0% |
| Easy/pleasant walking areas | 31.2% | 32.4% | 27.4% | 28.8% | 35.4% | 36.9% | 34.8% | 35.5% | 16.2% | 29.7% | 29.5% | 30.3% |
| Friendly/helpful/nice people | 28.6% | 27.4% | 32.2% | 26.6% | 37.0% | 38.6% | 33.2% | 31.6% | 21.0% | 26.9% | 28.5% | 24.8% |
| Many things to see and do here | 28.4% | 30.9% | 22.7% | 26.2% | 28.0% | 32.3% | 34.3% | 30.9% | 15.1% | 27.3% | 27.0% | 26.5% |
| The outdoor activities | 26.2% | 29.0% | 22.9% | 22.4% | 27.3% | 38.6% | 27.2% | 27.7% | 7.3% | 25.7% | 27.2% | 26.0% |
| Great restaurants/cuisine | 25.6% | 26.1% | 24.2% | 22.8% | 32.4% | 32.1% | 37.9% | 30.7% | 11.6% | 24.1% | 23.3% | 28.6% |
| Great shopping/stores | 20.2% | 19.7% | 17.2% | 19.8% | 25.5% | 27.6% | 31.1% | 27.7% | 9.3% | 18.0% | 19.5% | 28.2% |
| Excellent service | 13.8% | 12.6% | 17.0% | 13.3% | 17.9% | 22.7% | 17.5% | 19.4% | 3.9% | 12.2% | 13.3% | 17.7% |
| Good value | 10.8% | 12.0% | 9.0% | 9.2% | 11.5% | 12.6% | 10.8% | 12.8% | 5.8% | 10.4% | 8.7% | 11.6% |
| Like my hotel/lodging | 10.0% | 5.4% | 12.1% | 13.5% | 18.6% | 14.6% | 14.5% | 37.8% | 1.2% | 3.8% | 10.2% | 31.2% |
| Other (Specify) | 14.3% | 14.3% | 18.1% | 15.8% | 7.1% | 12.1% | 15.2% | 6.1% | 23.5% | 16.3% | 14.7% | 7.1% |

VISITORS HIGHLY LIKELY TO RETURN

- A strong 82% of visitors were either extremely or very likely to return to Huntington Beach in the future. This was lower than the 93% saying this in 2011, but both reflect the high level of repeat visitation to the area.
- Less frequent higher yield segments, that is, who like Huntington Beach and more likely to stay overnight would include Other (Northern) Californians, Other U.S. visitors and *young at heart luxury/leisure* retirees who have more time and income to travel.

Table 30 - Likelihood to Return

| | Total | Residence | | | | Activity Type | | HB Lodging | | | Family Tvlr | Biz/Mtg |
|---------------------------------|--------------|--------------|--------------|--------------|--------------|----------------|-----------------|--------------|---------------|--------------|----------------|--------------|
| | | So. CA | Other CA | U.S. | Int'l | Act. Sports | Lux. Leisure | Hot/Mot | Other Paid | Day Vis | | |
| Base: | 1511 | 622 | 111 | 587 | 191 | 360 | 459 | 382 | 150 | 775 | 444 | 113 |
| Extremely likely | 55.1% | 69.3% | 54.7% | 39.2% | 40.0% | 59.0% | 55.0% | 50.0% | 82.5% | 55.4% | 54.7% | 57.7% |
| Very likely | 26.8% | 23.8% | 31.3% | 29.1% | 29.9% | 31.3% | 27.7% | 30.3% | 11.2% | 26.7% | 26.1% | 16.2% |
| Extremely + Very Likely: | 81.9% | 93.1% | 86.0% | 68.3% | 69.9% | 90.2% | 82.7% | 80.3% | 93.7% | 82.1% | 80.9% | 73.9% |
| Somewhat likely | 12.6% | 5.3% | 8.7% | 21.6% | 20.3% | 6.0% | 10.4% | 14.7% | 3.6% | 12.2% | 13.5% | 13.0% |
| Somewhat unlikely | 3.3% | 0.4% | 3.3% | 6.7% | 5.6% | 1.7% | 3.9% | 3.3% | 0.1% | 3.4% | 3.2% | 8.1% |
| Very unlikely | 2.2% | 1.2% | 1.9% | 3.3% | 3.9% | 2.0% | 3.1% | 1.7% | 2.2% | 2.3% | 2.5% | 4.2% |
| DK/No response | 0.0% | 0.0% | 0.0% | 0.0% | 0.3% | 0.0% | 0.0% | 0.0% | 0.4% | 0.0% | 0.0% | 0.8% |
| Mean likelihood (5 → 1): | 4.29 | 4.60 | 4.34 | 3.94 | 3.97 | 4.43 | 4.28 | 4.24 | 4.72 | 4.30 | 4.27 | 4.15 |

HALF HERE FOR VACATION/PLEASURE PURPOSE

- Vacation/pleasure was the main (overall) reason for being in Huntington Beach, cited by 53% (67%) of all visitors, consistent with the city's messaging as a beach & surf locale.
- Another 11% (11%) came mainly for outdoor recreation/water activities, with 8% (1%) sightseeing and 7% (9%) visiting friends/family.

Table 31 – Main Purpose

| | Total | Residence | | | | Activity Type | | HB Lodging | | | Family Tvlr | Biz/Mtg |
|--|-------------|------------|------------|------------|------------|---------------|--------------|------------|------------|------------|-------------|------------|
| | | So. CA | Other CA | U.S. | Int'l | Act. Sports | Lux. Leisure | Hot/Mot | Other Paid | Day Vis | | |
| Base: | 1511 | 622 | 111 | 587 | 191 | 360 | 459 | 382 | 150 | 775 | 444 | 113 |
| Vacation/pleasure/to visit | 52.5% | 44.9% | 65.3% | 57.9% | 61.0% | 55.3% | 58.2% | 56.1% | 75.5% | 51.8% | 58.8% | 0.0% |
| Outdoor recreat. and/or water activities | 10.9% | 18.8% | 3.0% | 2.0% | 7.4% | 16.0% | 6.7% | 4.2% | 1.5% | 12.7% | 8.5% | 0.0% |
| Sightseeing/entertainment | 7.7% | 8.7% | 2.9% | 4.6% | 15.0% | 8.1% | 6.4% | 3.3% | 9.9% | 8.7% | 6.0% | 0.0% |
| To visit relatives/friends/personal visit | 7.0% | 6.2% | 9.9% | 9.1% | 2.3% | 5.7% | 6.5% | 7.0% | 4.4% | 6.4% | 7.5% | 0.0% |
| To dine out/culinary visit | 3.1% | 5.3% | 1.0% | 1.1% | 1.1% | 1.5% | 5.1% | 1.1% | 0.2% | 3.5% | 2.4% | 0.0% |
| To conduct business | 2.8% | 2.0% | 1.3% | 4.9% | 1.1% | 2.6% | 2.0% | 6.7% | 3.2% | 1.9% | 0.5% | 64.5% |
| To attend a special event/festival | 2.5% | 2.6% | 1.3% | 1.7% | 4.6% | 3.1% | 1.4% | 6.3% | 0.4% | 1.7% | 2.9% | 0.0% |
| Family or school reunion | 2.3% | 0.5% | 1.7% | 5.5% | 1.2% | 1.3% | 3.0% | 3.1% | 0.2% | 1.7% | 3.7% | 0.0% |
| Shopping | 1.7% | 1.9% | 4.0% | 1.1% | 1.0% | 1.0% | 4.2% | 0.8% | 0.4% | 1.9% | 1.5% | 0.0% |
| To attend a meeting/conference | 1.5% | 1.0% | 1.4% | 2.4% | 1.6% | 0.4% | 1.3% | 5.8% | 0.1% | 0.7% | 0.2% | 35.5% |
| Business or meeting and pleasure | 1.4% | 0.8% | 0.6% | 2.6% | 1.3% | 0.9% | 1.6% | 1.8% | 0.5% | 1.4% | 0.9% | 0.0% |
| Passing through to another place | 1.2% | 0.5% | 0.5% | 2.7% | 0.0% | 0.2% | 0.0% | 0.7% | 0.5% | 1.3% | 1.2% | 0.0% |
| Attend a wedding | 0.7% | 0.1% | 1.0% | 1.4% | 0.9% | 0.7% | 0.9% | 1.7% | 0.0% | 0.4% | 0.7% | 0.0% |
| Cultural activity, e.g., museum/performance, historical site | 0.2% | 0.4% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.3% | 0.0% | 0.0% |
| Other | 4.6% | 6.2% | 6.3% | 3.0% | 1.4% | 3.2% | 2.7% | 1.4% | 3.1% | 5.6% | 5.2% | 0.0% |

PAST EXPERIENCE OR REFERRAL MAIN SOURCE FOR HB DESTINATION INFORMATION

Visitors used various sources for Huntington Beach information when planning this trip as discussed below and charted on the next slide.

- Overall 82% of visitors used resources for information in planning this trip to Huntington Beach.
 - 29% (42%) of total visitors relied on a prior visit/own experience, while 23% (20%) relied on friends/relatives for advice.
 - Californians were more likely to rely on their own experience, which makes sense given their high share of repeat visitation, whereas the top named source by International and other U.S. visitors was friend/family referral, reflecting the importance of word-of-mouth for generating visitation.
 - Overall 16% (10%) used any internet source to plan this trip including 7% (n/a) using social media.
 - A specific Huntington Beach resource was mentioned by 3% (3%) of visitors for planning this trip.

DESTINATION INFORMATION SOURCES WHEN PLANNING THIS TRIP

Table 32 – Huntington Beach Destination Information Sources

| | Total | Residence | | | | Activity Type | | HB Lodging | | | Family Tvlr | Biz/Mtg |
|--|-------------|------------|-------------|------------|------------|----------------|-----------------|------------|---------------|------------|----------------|------------|
| | | So. CA | Other CA | U.S. | Int'l | Act. Sports | Lux. Leisure | Hot/Mot | Other Paid | Day Vis | | |
| Base: | 1511 | 622 | 111 | 587 | 191 | 360 | 459 | 382 | 150 | 775 | 444 | 113 |
| Own experience/been here before | 28.5% | 36.6% | 24.4% | 20.8% | 18.5% | 33.0% | 31.1% | 18.9% | 47.4% | 30.8% | 29.5% | 13.3% |
| Family member/friend | 23.0% | 15.0% | 26.3% | 31.5% | 31.0% | 22.0% | 23.0% | 25.0% | 16.5% | 21.8% | 27.2% | 11.0% |
| Any internet | 16.0% | 12.5% | 20.1% | 18.2% | 22.1% | 15.5% | 23.7% | 21.6% | 26.2% | 14.6% | 18.6% | 17.7% |
| Any social media | 6.6% | 6.7% | 7.6% | 5.2% | 10.2% | 9.7% | 6.7% | 7.7% | 2.7% | 6.3% | 5.3% | 12.6% |
| Hotel/lodging sites | 3.4% | 2.0% | 3.3% | 4.9% | 5.0% | 3.0% | 4.9% | 11.9% | 0.8% | 1.5% | 3.9% | 7.9% |
| Visit California web site | 2.6% | 1.2% | 0.0% | 2.4% | 11.0% | 3.4% | 1.9% | 4.0% | 7.5% | 2.1% | 2.1% | 2.6% |
| General travel website like travelocity.com, etc. | 2.4% | 0.6% | 1.9% | 3.5% | 7.4% | 4.6% | 4.3% | 4.2% | 1.3% | 2.0% | 2.5% | 3.2% |
| Visit Huntington Beach web site - surfcityusa.com | 2.3% | 1.8% | 1.9% | 2.1% | 5.2% | 3.2% | 3.5% | 3.5% | 7.1% | 2.0% | 2.0% | 2.9% |
| Travel Agent/Tour Operator | 1.3% | 0.5% | 5.0% | 0.5% | 4.7% | 1.3% | 1.8% | 1.0% | 1.4% | 1.4% | 0.8% | 7.9% |
| Meeting planer | 1.3% | 1.2% | 0.0% | 1.7% | 1.5% | 1.0% | 0.7% | 3.2% | 0.0% | 0.9% | 0.5% | 15.1% |
| Visit California Visitor Guide | 1.2% | 0.5% | 1.0% | 1.8% | 2.6% | 1.7% | 1.0% | 1.4% | 1.3% | 1.2% | 0.6% | 1.9% |
| Visit Huntington Beach Visitor Guide | 1.1% | 0.9% | 3.1% | 1.3% | 0.3% | 2.7% | 2.0% | 2.8% | 0.6% | 0.5% | 1.0% | 1.4% |
| Newspaper or magazine article or ad | 0.6% | 0.5% | 0.0% | 0.6% | 1.6% | 1.0% | 1.2% | 2.6% | 0.1% | 0.0% | 0.9% | 0.8% |
| Retail Guide books/Auto Club | 0.3% | 0.0% | 1.9% | 0.4% | 0.6% | 1.2% | 0.7% | 1.9% | 0.0% | 0.0% | 0.5% | 0.0% |
| Other | 6.6% | 7.9% | 10.5% | 3.9% | 6.5% | 6.0% | 3.1% | 4.7% | 3.6% | 7.1% | 3.7% | 10.5% |
| None/didn't use any | 17.8% | 21.4% | 13.3% | 16.9% | 7.8% | 16.3% | 13.2% | 11.0% | 4.4% | 19.7% | 15.2% | 21.0% |
| Refused/No response | 1.0% | 1.7% | 0.0% | 0.3% | 0.7% | 1.6% | 1.4% | 0.7% | 0.1% | 1.1% | 1.3% | 0.0% |

ONCE IN HUNTINGTON BEACH VISITORS ALSO RELY ON EXPERIENCE & REFERRALS

Visitors also indicated their information resources *once in* the Huntington Beach area as follows and shown in the next table.

- Overall 81% (77%) used information resources once they arrived in the area.
- Visitors' own experience of the area was their most used source, by 29% (43%), followed by 27% (6%) who used any Internet sources and 19% (17%) who relied on friends/family.
 - In short, about the same share relied on past experience for both planning the trip and once in Huntington Beach but far more used internet sources *in* the area than when planning.
- And once here Californians again were the most likely to use their own prior experience, while International visitors were more likely to rely on the internet for local information.

INFORMATION SOURCES ONCE IN HUNTINGTON BEACH

Table 33 – Information Sources Once in the Destination

| | Total | Residence | | | | Activity Type | | HB Lodging | | | Family Tvlr | Biz/Mtg |
|---|-------------|------------|-------------|------------|------------|----------------|-----------------|------------|---------------|------------|----------------|------------|
| | | So. CA | Other CA | U.S. | Int'l | Act. Sports | Lux. Leisure | Hot/Mot | Other Paid | Day Vis | | |
| Base: | 1511 | 622 | 111 | 587 | 191 | 360 | 459 | 382 | 150 | 775 | 444 | 113 |
| Own experience/been here before | 29.1% | 37.1% | 28.0% | 22.3% | 15.1% | 32.9% | 32.7% | 22.1% | 48.8% | 31.0% | 28.2% | 18.9% |
| Any internet | 26.6% | 21.2% | 24.2% | 28.9% | 44.3% | 28.7% | 34.5% | 41.5% | 37.2% | 23.1% | 26.5% | 34.9% |
| Family member/friend | 19.4% | 14.8% | 25.4% | 23.8% | 22.6% | 14.5% | 17.1% | 18.9% | 10.5% | 18.8% | 23.2% | 9.5% |
| Any social media | 9.0% | 9.2% | 12.2% | 7.3% | 11.4% | 11.9% | 10.1% | 11.1% | 2.1% | 8.6% | 7.2% | 8.3% |
| Hotel/Concierge/front desk | 2.1% | 0.5% | 1.2% | 3.0% | 7.1% | 3.5% | 1.9% | 9.2% | 1.4% | 0.6% | 1.7% | 11.0% |
| Visit California Internet/web site | 1.9% | 1.9% | 1.3% | 1.3% | 3.9% | 4.2% | 2.6% | 1.8% | 6.8% | 1.8% | 1.1% | 1.8% |
| Travel online site like travelocity, expedia, hotel.com etc. | 1.6% | 0.4% | 4.0% | 2.2% | 3.9% | 2.2% | 1.6% | 5.2% | 1.4% | 0.8% | 2.5% | 2.3% |
| Visit Huntington Beach Internet/web site surfcityusa.com | 1.4% | 1.9% | 2.5% | 0.6% | 1.4% | 1.2% | 1.5% | 2.7% | 1.7% | 1.2% | 1.2% | 1.6% |
| Newspaper or magazine | 1.3% | 1.5% | 0.3% | 1.7% | 0.2% | 1.0% | 0.3% | 2.0% | 0.0% | 1.2% | 1.4% | 3.1% |
| Visit California Visitor Guide | 1.3% | 1.2% | 0.4% | 1.8% | 0.9% | 3.0% | 0.0% | 2.5% | 0.0% | 1.0% | 1.0% | 5.5% |
| Visit Huntington Beach Visitor Guide | 1.2% | 0.9% | 0.4% | 1.8% | 1.5% | 1.6% | 1.5% | 4.3% | 2.1% | 0.5% | 1.1% | 1.8% |
| Local visitor bureau/visitor kiosk | 1.2% | 0.5% | 2.1% | 0.7% | 4.8% | 1.2% | 1.4% | 1.6% | 2.2% | 1.0% | 1.2% | 1.1% |
| Visit Huntington Beach Information Kiosk at the Pier | 1.1% | 0.6% | 1.0% | 1.0% | 4.1% | 1.8% | 2.3% | 3.2% | 0.1% | 0.6% | 1.1% | 0.3% |
| Retail or Auto Club guide books | 0.6% | 0.2% | 0.0% | 1.6% | 0.0% | 0.4% | 0.0% | 1.3% | 0.0% | 0.5% | 0.8% | 4.2% |
| Travel Agent/Tour Operator | 0.5% | 0.6% | 0.0% | 0.5% | 0.6% | 0.7% | 0.4% | 1.3% | 0.0% | 0.3% | 0.2% | 2.9% |
| Other | 3.4% | 2.5% | 1.9% | 3.3% | 8.5% | 4.4% | 2.9% | 4.4% | 6.2% | 3.3% | 3.2% | 4.0% |
| No other sources | 18.5% | 20.4% | 13.6% | 18.8% | 12.7% | 13.4% | 14.7% | 9.7% | 5.7% | 20.7% | 18.4% | 22.3% |

GOOGLE MOST POPULAR ONLINE RESOURCE

- Among total visitors who used the internet when planning or once in the area, over half, 56% (44%) searched on Google.
- A distant second was Facebook at 18% well above the 3% using it in 2011 while 16% used Instagram.

Table 34 – Specific Internet Sources Used for Travel Information

| | Total | Residence | | | | Activity Type | | HB Lodging | | | Family Tvlr | Biz/Mtg |
|---|------------|------------|-----------|------------|------------|---------------|--------------|------------|------------|------------|-------------|-----------|
| | | So. CA | Other CA | U.S. | Int'l | Act. Sports | Lux. Leisure | Hot/Mot | Other Paid | Day Vis | | |
| Base: Used internet sources | 734 | 269 | 60 | 280 | 125 | 204 | 257 | 234 | 87 | 327 | 208 | 65 |
| Google search engine | 56.0% | 43.6% | 43.5% | 69.6% | 68.5% | 47.8% | 61.0% | 58.0% | 69.4% | 55.4% | 61.8% | 54.9% |
| Facebook | 18.0% | 19.4% | 7.9% | 14.8% | 25.1% | 22.1% | 19.3% | 15.4% | 11.7% | 18.5% | 16.8% | 10.9% |
| Instagram | 16.4% | 20.4% | 14.8% | 11.0% | 17.3% | 20.9% | 19.2% | 15.4% | 2.1% | 17.0% | 12.9% | 11.2% |
| Interactive website, Yelp, etc. | 10.7% | 8.0% | 12.9% | 13.3% | 11.7% | 5.1% | 17.3% | 14.0% | 2.8% | 9.9% | 10.2% | 9.3% |
| Twitter | 6.9% | 12.0% | 5.6% | 2.4% | 2.6% | 12.1% | 6.6% | 5.5% | 3.8% | 7.4% | 3.7% | 12.0% |
| Other social media | 6.2% | 7.0% | 10.8% | 2.2% | 9.4% | 6.8% | 5.6% | 3.1% | 0.2% | 7.4% | 4.8% | 1.9% |
| You Tube | 5.0% | 3.6% | 2.2% | 4.7% | 10.5% | 9.1% | 6.5% | 6.4% | 1.4% | 4.2% | 3.3% | 11.0% |
| Travel online site like travelocity, expedia, hotel.com etc | 3.5% | 0.8% | 5.4% | 8.0% | 1.1% | 2.9% | 3.7% | 10.9% | 0.6% | 1.2% | 3.1% | 11.9% |
| Other internet based resource | 3.4% | 3.7% | 3.6% | 2.2% | 4.5% | 2.3% | 1.9% | 7.3% | 14.4% | 2.0% | 4.0% | 10.3% |
| Pinterest | 3.2% | 3.2% | 5.6% | 3.6% | 1.5% | 5.9% | 5.5% | 5.0% | 0.2% | 2.5% | 3.5% | 1.5% |
| Other search engine | 2.6% | 2.1% | 4.4% | 1.7% | 4.7% | 2.2% | 1.5% | 3.5% | 0.1% | 1.9% | 2.2% | 0.6% |
| Mobile voice activated search | 1.8% | 0.9% | 0.7% | 1.7% | 5.1% | 4.3% | 2.2% | 5.4% | 0.0% | 0.6% | 0.8% | 2.8% |
| Attraction sites | 1.6% | 0.9% | 5.9% | 1.8% | 1.0% | 0.3% | 2.5% | 4.2% | 0.8% | 0.6% | 1.7% | 0.0% |
| Air or other transportation sites | 0.2% | 0.0% | 0.0% | 0.7% | 0.0% | 0.0% | 0.0% | 0.3% | 0.0% | 0.2% | 0.0% | 0.0% |
| None of these | 5.8% | 6.1% | 16.1% | 5.2% | 1.3% | 10.6% | 2.2% | 5.3% | 4.6% | 6.2% | 7.3% | 3.1% |

NAMED HUNTINGTON BEACH THEIR MAIN DESTINATION

- Huntington Beach was the main trip destination for 55% (61%) of visitors overall.
 - For 21% (26%) other Orange County areas were the main destination.
- By residence, Huntington Beach was the main destination for 80% (90%) of Californians, 38% (28%) of other U.S. residents and for 26% (17%) of International residents.
 - This suggests that Huntington Beach is a secondary destination among longer-haul visitors.

Table 35 – Main Trip Destination

| | Total | Residence | | | | Activity Type | | HB Lodging | | | Family Tvlr | Biz/Mtg |
|--|--------------|--------------|--------------|--------------|--------------|----------------|-----------------|--------------|---------------|--------------|----------------|--------------|
| | | So. CA | Other CA | U.S. | Int'l | Act. Sports | Lux. Leisure | Hot/Mot | Other Paid | Day Vis | | |
| Base: | 1511 | 622 | 111 | 587 | 191 | 360 | 459 | 382 | 150 | 775 | 444 | 113 |
| HUNTINGTON BEACH | 54.5% | 79.6% | 38.2% | 30.7% | 25.6% | 58.2% | 46.5% | 59.3% | 79.1% | 52.7% | 53.2% | 53.9% |
| Other area(s) within Orange County | 20.9% | 9.0% | 29.7% | 36.9% | 19.9% | 14.2% | 24.3% | 11.9% | 1.0% | 23.7% | 23.0% | 20.8% |
| Los Angeles area | 12.8% | 5.0% | 22.3% | 18.2% | 24.3% | 11.5% | 14.1% | 8.9% | 6.0% | 14.0% | 13.4% | 13.2% |
| Southern California areas (non Orange Co/LA, Santa Barbara to San Diego) | 5.2% | 2.9% | 4.6% | 8.5% | 6.0% | 5.7% | 6.9% | 8.9% | 0.6% | 4.5% | 5.3% | 6.4% |
| All of California | 1.6% | 0.5% | 2.3% | 0.9% | 8.0% | 3.0% | 3.0% | 4.0% | 2.6% | 0.9% | 1.2% | 0.0% |
| USA (California & other areas) | 1.5% | 0.5% | 2.0% | 1.0% | 6.4% | 1.4% | 1.8% | 2.3% | 4.5% | 1.2% | 1.9% | 0.0% |
| San Francisco Bay area | 0.9% | 0.2% | 0.8% | 0.5% | 4.8% | 1.1% | 0.6% | 1.6% | 0.0% | 0.5% | 0.5% | 0.4% |
| California and/or other Western States | 0.6% | 0.2% | 0.0% | 1.0% | 1.9% | 0.5% | 0.5% | 0.4% | 0.3% | 0.6% | 0.5% | 0.0% |
| Central California coastal cities | 0.6% | 0.2% | 0.0% | 0.7% | 2.5% | 1.1% | 1.3% | 0.8% | 0.0% | 0.6% | 0.5% | 0.3% |
| Other Northern California | 0.3% | 0.2% | 0.0% | 0.7% | 0.0% | 0.7% | 0.4% | 1.4% | 0.0% | 0.1% | 0.1% | 4.2% |
| All other areas (not listed above) | 1.2% | 1.7% | 0.0% | 1.0% | 0.6% | 2.5% | 0.4% | 0.6% | 5.7% | 1.2% | 0.2% | 0.8% |

¾ NAMED HUNTINGTON BEACH AS A MAIN OR OTHER DESTINATION

- When main destination + other destinations visiting are totaled, 78% (98%) of visitors named Huntington Beach as a destination on this trip. *
- Again, the farther visitors' origin from Huntington Beach the more likely they were to visit more areas (than just Huntington Beach).
 - More Other U.S. visitors went to other O C areas, whereas more International visitors also visited the Los Angeles area.

Table 36 – Main + Other Destinations

| | Total | Residence | | | | Activity Type | | HB Lodging | | | Family Tvlr | Biz/Mtg |
|------------------------------------|--------------|--------------|--------------|--------------|--------------|----------------|-----------------|--------------|---------------|--------------|----------------|--------------|
| | | So. CA | Other CA | U.S. | Int'l | Act. Sports | Lux. Leisure | Hot/Mot | Other Paid | Day Vis | | |
| Base: | 1511 | 622 | 111 | 587 | 191 | 360 | 459 | 382 | 150 | 775 | 444 | 113 |
| HUNTINGTON BEACH | 77.5% | 86.4% | 75.2% | 71.5% | 57.7% | 75.0% | 77.7% | 72.1% | 86.1% | 78.7% | 78.9% | 75.7% |
| Other area(s) within Orange County | 31.7% | 18.4% | 44.5% | 47.9% | 33.7% | 29.4% | 39.9% | 28.1% | 15.6% | 33.0% | 34.9% | 24.2% |
| Los Angeles area | 28.8% | 11.4% | 44.6% | 39.5% | 62.0% | 29.5% | 33.6% | 30.8% | 11.6% | 28.2% | 30.1% | 29.1% |
| Southern California areas (non-OC) | 12.4% | 5.2% | 11.0% | 20.1% | 22.4% | 14.3% | 15.6% | 19.4% | 8.3% | 10.6% | 12.9% | 15.0% |
| All of California | 3.9% | 2.7% | 2.3% | 2.8% | 13.1% | 9.1% | 7.3% | 5.9% | 10.2% | 3.2% | 2.5% | 6.0% |
| San Francisco Bay area | 3.6% | 0.8% | 3.3% | 2.7% | 18.9% | 4.5% | 5.8% | 5.9% | 4.5% | 3.0% | 3.6% | 1.5% |
| USA (California plus other areas) | 2.6% | 1.3% | 2.0% | 2.1% | 10.3% | 4.3% | 2.7% | 3.0% | 10.8% | 2.3% | 2.4% | 0.2% |
| California and/or Western States | 1.9% | 0.2% | 0.2% | 2.8% | 7.3% | 1.8% | 2.3% | 1.9% | 1.6% | 1.8% | 1.6% | 4.4% |
| Central California coastal cities | 1.8% | 0.6% | 4.8% | 1.8% | 4.6% | 2.8% | 2.6% | 2.7% | 1.2% | 1.6% | 1.5% | 0.3% |
| Other Northern California | 0.8% | 0.2% | 2.3% | 1.3% | 1.3% | 1.7% | 1.4% | 3.5% | 0.1% | 0.2% | 0.7% | 5.2% |
| All other areas (not listed above) | 2.6% | 2.2% | 11.5% | 1.8% | 1.2% | 3.2% | 2.0% | 1.4% | 5.8% | 2.8% | 2.0% | 0.8% |

* Not all visitors named Huntington Beach as they have been only passing through.

MOST VISITING ORANGE COUNTY WENT TO THE ANAHEIM AREA

The 32% (34%) who indicated visiting Orange County areas outside of Huntington Beach specified which ones as follows.

- Nearly half, 45% (58%) visited the Anaheim/ Disneyland area, while 29% (12%) named Newport Beach, and 16% (6%) also went to Laguna Beach.
- Another 25% (29%) visited other additional Orange County areas.

Table 37 – Other Orange County (non-Huntington Beach) Areas Visited

| | Total | Residence | | | | Activity Type | | HB Lodging | | | Family Tvlr | Biz/Mtg |
|-----------------------------------|------------|------------|-----------|------------|-----------|---------------|--------------|------------|------------|------------|-------------|-----------|
| | | So. CA | Other CA | U.S. | Int'l | Act. Sports | Lux. Leisure | Hot/Mot | Other Paid | Day Vis | | |
| Base: Visiting other areas | 475 | 121 | 47 | 241 | 66 | 107 | 179 | 112 | 34 | 271 | 156 | 27 |
| Anaheim/Disneyland area | 45.0% | 21.0% | 46.5% | 56.2% | 54.4% | 40.4% | 49.6% | 42.1% | 17.4% | 45.9% | 50.9% | 52.5% |
| Newport Beach area | 28.6% | 32.1% | 27.3% | 21.3% | 51.5% | 44.3% | 34.2% | 36.1% | 60.9% | 26.9% | 24.3% | 25.5% |
| Laguna Beach Area | 16.3% | 7.1% | 17.4% | 17.0% | 33.9% | 20.0% | 17.2% | 16.3% | 6.4% | 15.7% | 13.0% | 14.2% |
| Costa Mesa | 11.9% | 9.8% | 16.4% | 10.4% | 19.4% | 18.2% | 17.9% | 14.6% | 6.1% | 10.9% | 10.4% | 12.8% |
| Irvine | 10.2% | 4.9% | 21.3% | 9.7% | 15.0% | 6.5% | 13.6% | 23.2% | 3.5% | 7.4% | 11.0% | 6.2% |
| Buena Park | 4.2% | 2.3% | 4.1% | 5.3% | 3.7% | 2.7% | 7.7% | 9.2% | 0.9% | 3.3% | 4.6% | 1.3% |
| San Juan Capistrano | 2.2% | 2.1% | 0.0% | 2.4% | 3.5% | 3.3% | 2.3% | 1.7% | 0.2% | 2.0% | 2.6% | 0.0% |
| Other Orange County areas | 24.7% | 33.4% | 21.1% | 21.5% | 20.7% | 19.7% | 17.2% | 18.9% | 35.4% | 25.7% | 22.3% | 22.1% |

BEACH AND R & R MOST PREFERRED GENERAL TRIP TYPES

- In general when seeking to get away, 37% of visitors prefer beach trips, 29% prefer rest & relaxation, 26% named food/drink experiences and 22% prefer outdoor fun in the sun.

Table 38 – Top Types of Trips Prefer in General

| | Total | Residence | | | | Activity Type | | HB Lodging | | | Family Tvlr | Biz/Mtg |
|---|-------------|------------|-------------|------------|------------|----------------|-----------------|------------|---------------|------------|----------------|------------|
| | | So. CA | Other CA | U.S. | Int'l | Act. Sports | Lux. Leisure | Hot/Mot | Other Paid | Day Vis | | |
| Base: | 1511 | 622 | 111 | 587 | 191 | 360 | 459 | 382 | 150 | 775 | 444 | 113 |
| Beach, beach, beach | 36.6% | 33.4% | 31.5% | 41.5% | 39.6% | 38.9% | 39.9% | 40.2% | 39.2% | 36.1% | 37.9% | 36.8% |
| Rest & relaxation | 29.4% | 26.2% | 24.4% | 34.6% | 31.7% | 24.8% | 31.4% | 35.1% | 40.1% | 28.0% | 31.2% | 33.8% |
| Food and drink experience | 25.7% | 26.1% | 31.3% | 22.2% | 30.1% | 26.0% | 32.7% | 29.1% | 15.7% | 25.2% | 23.6% | 29.1% |
| Outdoor adventure/fun in the sun | 21.8% | 22.8% | 21.8% | 20.3% | 22.1% | 22.7% | 22.9% | 16.2% | 41.4% | 23.0% | 21.0% | 22.7% |
| Short get-away | 17.5% | 21.4% | 15.8% | 15.9% | 6.3% | 15.8% | 16.9% | 14.8% | 18.0% | 18.4% | 18.0% | 23.4% |
| Theme parks/attractions | 14.3% | 8.9% | 18.4% | 21.7% | 13.2% | 10.3% | 20.6% | 14.7% | 6.3% | 14.6% | 18.3% | 17.5% |
| Family connections | 13.5% | 11.6% | 24.1% | 15.5% | 8.9% | 16.7% | 13.8% | 15.2% | 6.4% | 12.7% | 17.7% | 13.9% |
| Visiting/socializing with friends or family | 12.9% | 8.4% | 14.8% | 17.0% | 18.5% | 13.9% | 17.0% | 16.6% | 11.1% | 11.8% | 15.9% | 8.1% |
| Being in or around nature/camping | 9.9% | 13.0% | 10.3% | 6.0% | 7.4% | 8.9% | 7.9% | 4.4% | 29.2% | 11.0% | 9.5% | 10.0% |
| Nature/eco-tourism | 9.0% | 10.8% | 5.0% | 5.4% | 14.0% | 8.9% | 7.3% | 6.5% | 9.4% | 9.6% | 5.6% | 11.6% |
| Water activities of any type | 8.7% | 11.6% | 2.7% | 6.2% | 7.8% | 15.7% | 8.1% | 6.9% | 12.3% | 9.1% | 9.3% | 3.8% |
| Arts and culture | 7.2% | 8.8% | 8.7% | 4.5% | 6.8% | 9.4% | 5.9% | 5.5% | 1.6% | 7.6% | 6.2% | 4.0% |
| Shop till I drop | 7.0% | 5.6% | 12.6% | 6.1% | 11.6% | 3.8% | 12.8% | 7.6% | 7.8% | 6.8% | 8.4% | 1.3% |
| Music festivals/concerts | 6.9% | 8.1% | 4.1% | 6.0% | 6.2% | 6.6% | 6.7% | 5.5% | 2.1% | 7.3% | 4.5% | 9.5% |
| So. California adventure - do it all! | 6.9% | 6.0% | 3.7% | 7.7% | 10.6% | 8.6% | 10.3% | 9.8% | 2.0% | 6.2% | 6.0% | 5.4% |
| Exploring area cultural/historical sites | 6.6% | 6.7% | 5.5% | 5.3% | 10.5% | 3.7% | 7.7% | 7.6% | 3.7% | 6.4% | 5.4% | 10.7% |
| Surf, surf, surf | 5.7% | 4.9% | 14.4% | 4.6% | 6.6% | 17.6% | 4.9% | 7.6% | 2.1% | 5.3% | 5.0% | 2.7% |
| Urban adventure | 4.4% | 4.9% | 0.6% | 4.4% | 4.5% | 6.2% | 2.7% | 1.4% | 7.1% | 4.9% | 2.4% | 0.7% |
| Special events/non-music festivals | 3.9% | 4.7% | 4.3% | 3.1% | 3.2% | 3.9% | 4.3% | 4.5% | 5.8% | 3.8% | 4.3% | 2.3% |
| Out on the water boating, sailing cruising | 3.3% | 2.8% | 5.3% | 3.0% | 4.6% | 5.3% | 3.2% | 2.7% | 3.9% | 3.2% | 2.2% | 3.4% |
| Other | 4.2% | 5.4% | 0.4% | 4.1% | 1.5% | 1.8% | 1.7% | 2.1% | 2.5% | 4.6% | 2.2% | 7.8% |

BEACH AND R & R MOST ENVISIONED FOR HUNTINGTON BEACH

- When thinking about visiting Huntington Beach specifically, 30% envisioned beach, 26% rest & relaxation, 22% a food/drink experience and 16% said a short get-away.
- Little variance is seen between segments for the top three considerations.

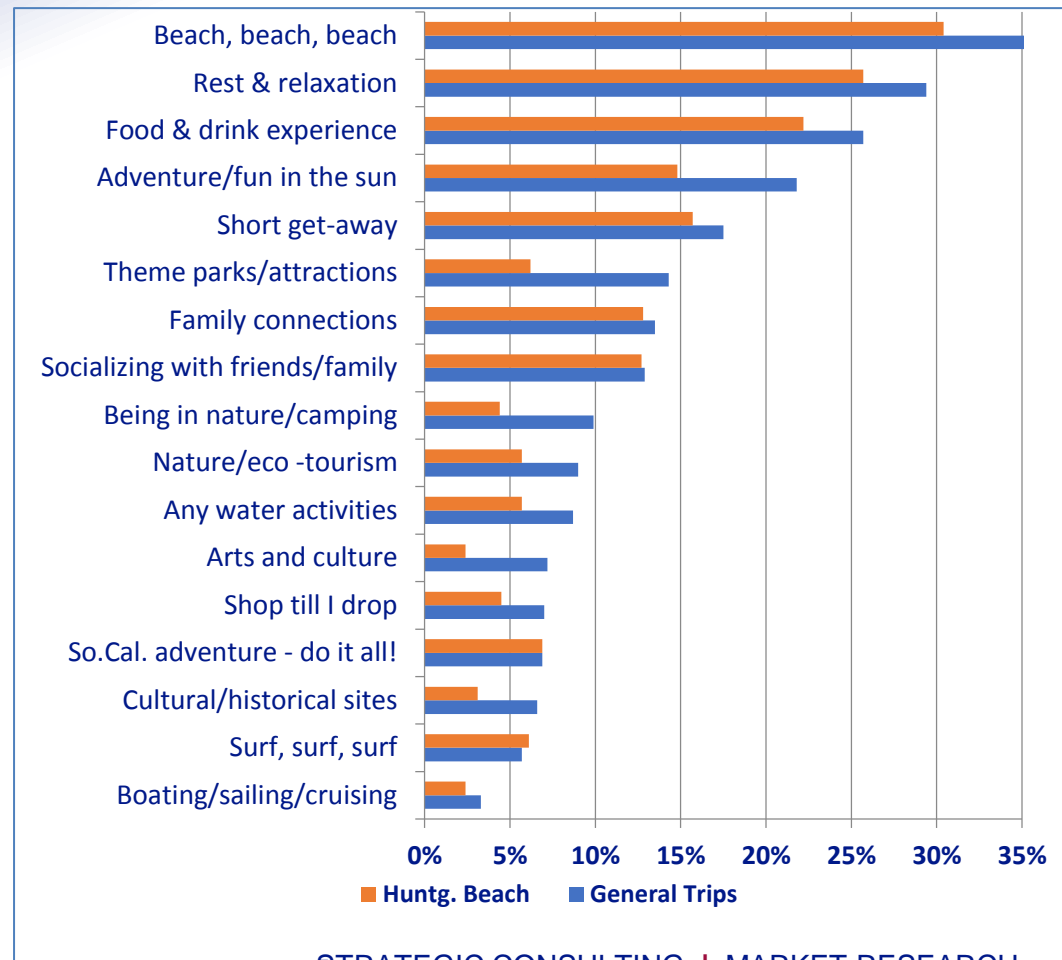
Table 39 – Trip Envisioned When Planning Visit to Huntington Beach

| | Total | Residence | | | | Activity Type | | HB Lodging | | | Family Tvlr | Biz/Mtg |
|--|-------------|------------|-------------|------------|------------|----------------|-----------------|------------|---------------|------------|----------------|------------|
| | | So. CA | Other CA | U.S. | Int'l | Act. Sports | Lux. Leisure | Hot/Mot | Other Paid | Day Vis | | |
| Base: | 1511 | 622 | 111 | 587 | 191 | 360 | 459 | 382 | 150 | 775 | 444 | 113 |
| Beach, beach, beach | 30.4% | 29.4% | 33.2% | 30.4% | 33.3% | 29.4% | 34.1% | 26.4% | 29.8% | 31.3% | 29.0% | 35.6% |
| Rest & relaxation | 25.7% | 22.9% | 30.0% | 29.1% | 25.6% | 25.9% | 27.9% | 28.1% | 37.9% | 25.3% | 25.7% | 16.5% |
| Food and drink experience | 22.2% | 23.9% | 30.0% | 17.9% | 22.1% | 17.0% | 31.9% | 20.0% | 11.5% | 23.4% | 22.1% | 22.8% |
| Short get-away | 15.7% | 16.3% | 16.5% | 14.8% | 15.3% | 17.0% | 18.5% | 16.3% | 17.6% | 15.8% | 14.5% | 18.8% |
| Outdoor adventure/fun in the sun | 14.8% | 14.2% | 14.5% | 16.5% | 13.2% | 18.5% | 16.5% | 11.8% | 22.9% | 15.2% | 16.0% | 17.2% |
| Family connections | 12.8% | 11.9% | 18.0% | 15.3% | 5.9% | 13.3% | 13.6% | 14.8% | 4.4% | 11.8% | 18.3% | 2.5% |
| Social/visits with friends or family | 12.7% | 12.0% | 12.7% | 14.8% | 9.5% | 11.0% | 12.5% | 12.6% | 15.3% | 12.6% | 13.5% | 6.1% |
| So. California adventure - do it all! | 6.9% | 6.3% | 2.7% | 8.4% | 8.1% | 11.4% | 11.5% | 8.6% | 4.3% | 6.5% | 6.5% | 10.5% |
| Theme parks/attractions | 6.2% | 2.5% | 5.4% | 11.7% | 6.7% | 6.2% | 9.1% | 11.8% | 0.3% | 5.1% | 7.4% | 5.3% |
| Surf, surf, surf | 6.1% | 5.1% | 7.8% | 5.7% | 10.3% | 17.9% | 6.8% | 6.9% | 1.0% | 5.9% | 5.5% | 13.0% |
| Water activities of any type | 5.7% | 5.2% | 9.0% | 5.4% | 6.5% | 8.1% | 6.1% | 8.1% | 6.2% | 5.0% | 6.8% | 4.5% |
| Nature/eco -tourism | 5.7% | 8.2% | 1.9% | 3.0% | 4.9% | 2.7% | 1.0% | 3.3% | 2.9% | 6.1% | 5.0% | 3.1% |
| Shop till I drop | 4.5% | 2.6% | 5.8% | 5.0% | 10.8% | 4.0% | 10.0% | 4.8% | 1.6% | 4.3% | 4.8% | 3.9% |
| Being in or around nature/camping | 4.4% | 6.7% | 2.8% | 1.7% | 3.3% | 9.5% | 3.2% | 1.4% | 15.0% | 4.8% | 3.4% | 1.5% |
| Exploring area cultural/historical sites | 3.1% | 1.3% | 1.1% | 5.0% | 6.3% | 4.5% | 3.5% | 5.5% | 7.3% | 2.4% | 3.3% | 5.0% |
| Arts and culture | 2.4% | 2.0% | 4.1% | 1.8% | 4.4% | 3.4% | 2.6% | 2.6% | 5.8% | 2.3% | 3.5% | 2.3% |
| On the water boating, sailing, cruising | 2.4% | 3.2% | 0.2% | 1.9% | 1.8% | 5.6% | 1.5% | 1.9% | 2.8% | 2.3% | 2.8% | 2.3% |

COMPARISON OF TRIP IN GENERAL AND FOR HUNTINGTON BEACH

- The top types of trips for visitors in general and when thinking about a trip to Huntington Beach are compared in Exhibit 2.
- They generally are consistent by ranking and percentage.
- However, perhaps surprisingly, visitors rated all the attributes higher in general than for Huntington Beach, except for surf.
- It could be surmised that these attributes are less established in visitors' minds for Huntington Beach (brand identity) than in general or for other comparable destinations.

**Exhibit 2 – Comparison General Trips and
Type of Trip for Huntington Beach**



MOST DID NOT FIND UNEXPECTED IN HB FROM WHAT ENVISIONED

- Few unexpected items were found (i.e., any items rated by a higher percentage) than what they envisioned in Huntington Beach.
- Arts and culture at 8% was just slightly above the 7% who envisioned this on the trip here.

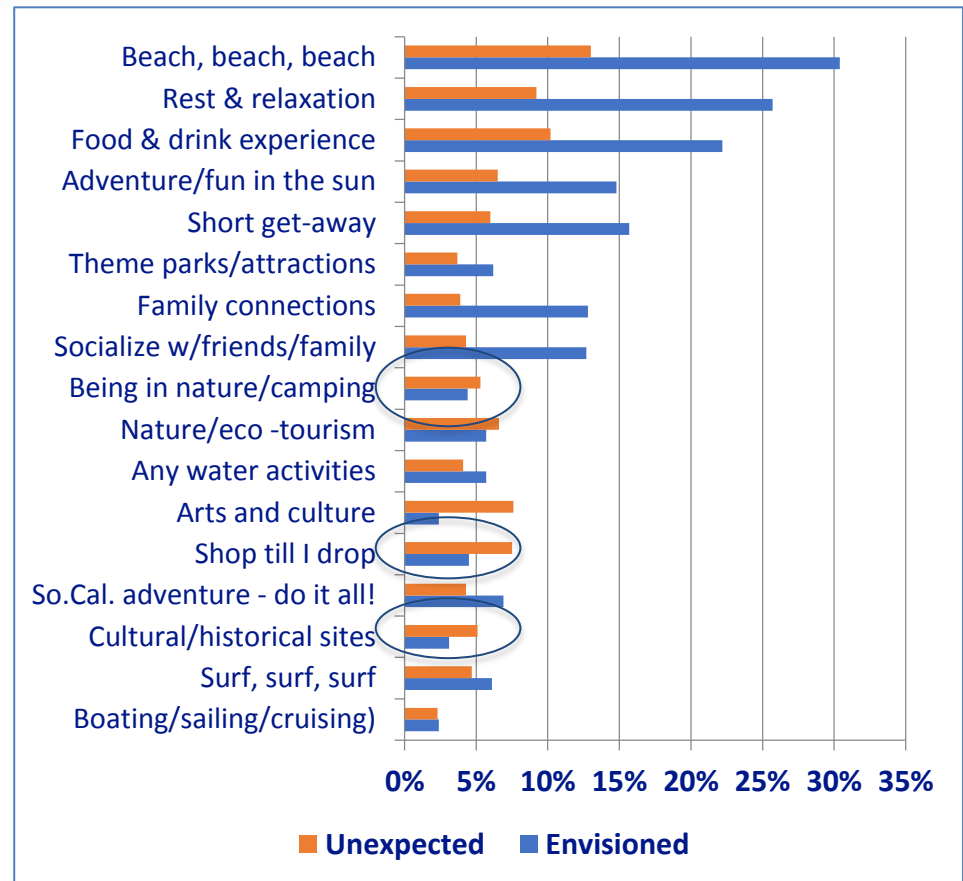
**Table 40 – What Found Unexpected Once in Huntington Beach
(>4%)**

| | Total | Residence | | | | Activity Type | | HB Lodging | | | Family Tvlr | Biz/Mtg |
|---|-------------|------------|-------------|------------|------------|----------------|-----------------|------------|---------------|------------|----------------|------------|
| | | So. CA | Other CA | U.S. | Int'l | Act. Sports | Lux. Leisure | Hot/Mot | Other Paid | Day Vis | | |
| Base: | 1511 | 622 | 111 | 587 | 191 | 360 | 459 | 382 | 150 | 775 | 444 | 113 |
| Beach, beach, beach | 13.0% | 12.8% | 9.6% | 11.4% | 20.1% | 23.0% | 17.7% | 14.2% | 4.1% | 12.6% | 12.5% | 15.1% |
| Food and drink experience | 10.2% | 6.9% | 8.2% | 13.4% | 17.1% | 11.0% | 14.7% | 16.5% | 6.1% | 8.4% | 9.3% | 19.0% |
| Rest & relaxation | 9.2% | 9.8% | 5.7% | 8.4% | 10.9% | 9.7% | 11.1% | 10.5% | 4.8% | 9.0% | 10.1% | 7.2% |
| Arts and culture | 7.6% | 6.9% | 4.1% | 7.6% | 12.3% | 10.5% | 12.2% | 4.9% | 1.2% | 8.2% | 7.2% | 8.6% |
| Shop till I drop | 7.5% | 7.5% | 12.5% | 6.5% | 7.2% | 9.5% | 14.4% | 10.1% | 6.1% | 7.0% | 8.9% | 4.1% |
| Nature/eco -tourism | 6.6% | 6.8% | 6.6% | 6.1% | 6.9% | 6.6% | 3.5% | 6.1% | 13.5% | 6.6% | 6.4% | 10.0% |
| Outdoor adventure/fun in the sun | 6.5% | 8.6% | 7.8% | 3.7% | 4.3% | 9.8% | 6.0% | 5.9% | 2.7% | 6.6% | 5.6% | 5.4% |
| Short get-away | 6.0% | 5.6% | 3.4% | 7.8% | 4.0% | 8.4% | 8.5% | 11.0% | 1.5% | 4.8% | 6.7% | 7.3% |
| Being in or around nature/camping | 5.3% | 6.0% | 1.5% | 4.5% | 6.4% | 11.6% | 4.3% | 4.8% | 0.3% | 5.3% | 4.7% | 5.3% |
| Exploring area cultural/historical sites | 5.1% | 4.8% | 14.8% | 3.3% | 5.5% | 6.0% | 4.9% | 6.0% | 12.3% | 4.8% | 5.2% | 2.4% |
| Surf, surf, surf | 4.7% | 3.5% | 5.4% | 5.4% | 7.0% | 8.0% | 3.4% | 4.8% | 1.0% | 4.7% | 5.4% | 10.6% |
| So. California adventure - do it all! | 4.3% | 3.5% | 6.3% | 4.3% | 6.5% | 4.0% | 5.5% | 3.3% | 1.9% | 4.6% | 4.0% | 3.2% |
| Visiting/socializing with friends or family | 4.3% | 4.6% | 6.6% | 3.6% | 3.5% | 4.6% | 4.7% | 3.2% | 0.9% | 4.5% | 3.5% | 1.7% |
| Water activities of any type | 4.1% | 4.2% | 11.5% | 2.6% | 3.2% | 4.6% | 3.6% | 3.6% | 1.5% | 4.3% | 4.2% | 0.9% |

WHAT FOUND UNEXPECTED VS. ENVISIONED FOR HB TRIP

- In contrast to what was envisioned, most didn't find much unexpected in Huntington Beach.
- However, the unexpected exceeded the envisioned for nature/eco tour with 6% envisioning and 7% unexpected, arts and culture with 2% envisioning and nearly 8% unexpectedly finding it and culture/historical sites at 3% and 5% respectively.
- These items may be a basis to expand messaging as to unexpected visitor offerings.

Exhibit 3 – Unexpected versus Envisioned for HB Trip



DISNEY RESORT MOST VISITED SO. CAL. ATTRACTION BY HB VISITORS

- About a third or 37% (30%) were visiting Southern California attractions, as follows:
 - 1 in 5 or 20% (22%) went to the Disney Resort then half or fewer visited the next-most popular venues, Universal Studios, South Coast Plaza, Knott's Berry Farm, Queen Mary, Fashion Island and Aquarium of the Pacific.

Table 4I – Southern California Attractions/Venues Visited

| | Total | Residence | | | | Activity Type | | HB Lodging | | | Family Tvlr | Biz/Mtg |
|--|-------------|------------|------------|------------|------------|---------------|--------------|------------|------------|------------|-------------|------------|
| | | So. CA | Other CA | U.S. | Int'l | Act. Sports | Lux. Leisure | Hot/Mot | Other Paid | Day Vis | | |
| Base: | 1511 | 622 | 111 | 587 | 191 | 360 | 459 | 382 | 150 | 775 | 444 | 113 |
| Disneyland Resort/California Adventure | 20.5% | 8.9% | 22.6% | 31.8% | 36.2% | 24.6% | 28.3% | 21.5% | 8.8% | 20.3% | 26.8% | 9.4% |
| Universal Studios/Universal City Walk | 10.1% | 4.8% | 14.3% | 9.3% | 32.6% | 14.5% | 14.4% | 8.5% | 1.0% | 10.4% | 11.4% | 0.0% |
| South Coast Plaza retail center | 6.8% | 5.4% | 8.0% | 5.9% | 14.2% | 11.0% | 12.3% | 6.9% | 0.7% | 6.4% | 6.5% | 6.1% |
| Knott's Berry Farm/Soak City | 6.6% | 6.8% | 6.2% | 6.7% | 5.4% | 9.9% | 10.9% | 8.4% | 1.0% | 6.0% | 6.8% | 6.9% |
| Queen Mary in Long Beach | 6.2% | 7.6% | 5.6% | 4.2% | 6.6% | 9.6% | 7.3% | 5.5% | 1.2% | 6.1% | 6.1% | 4.1% |
| Fashion Island retail center | 5.8% | 3.8% | 9.0% | 5.8% | 12.2% | 10.1% | 11.2% | 7.6% | 1.0% | 4.8% | 4.5% | 6.6% |
| Aquarium of the Pacific (Long Beach | 5.6% | 6.6% | 7.6% | 2.8% | 8.1% | 9.5% | 7.8% | 4.0% | 1.0% | 5.9% | 6.3% | 5.2% |
| Magic Mountain | 5.4% | 5.5% | 7.3% | 4.0% | 8.1% | 11.9% | 7.4% | 4.8% | 1.7% | 5.5% | 5.9% | 1.1% |
| Any professional or collegiate sports events/tournaments | 1.9% | 2.1% | 0.0% | 2.0% | 1.6% | 5.5% | 3.6% | 3.1% | 7.5% | 1.5% | 1.1% | 1.5% |
| Segerstrom Center for Performing Arts | 1.6% | 1.3% | 0.4% | 1.1% | 4.6% | 4.1% | 2.2% | 2.2% | 0.2% | 1.4% | 1.0% | 4.2% |
| Discovery Cube/Museums | 1.5% | 1.7% | 2.6% | 1.2% | 1.2% | 3.3% | 1.7% | 3.4% | 0.3% | 1.0% | 0.9% | 2.4% |
| None of the above/not visiting attractions | 62.5% | 79.0% | 51.8% | 50.2% | 34.3% | 53.7% | 50.7% | 54.8% | 85.6% | 64.9% | 56.5% | 76.4% |

MOST DROVE INTO SO CAL./ORANGE COUNTY

- To arrive in Southern California 71% (77%) drove of which 60% (68%) drove a personal vehicle and 11% (8%) used a rental vehicle, while 18% (23%) arrived by air,
 - As 17% (18%) of Other U.S. and 35% (16%) of International visitors arrived in a rental vehicle, this (and use of air indicated below) suggests that they either flew in elsewhere then drove to Southern California, and did so as much or more than in 2011.
 - Californians were the most likely to arrive by personal vehicle 88% (98%) while 39% (44%) of Other U.S. and 31% (74%) of International visitors arrived by air into the region.

Table 42 – Mode of Arrival into So. Cal./Orange County

| | Total | Residence | | | | Activity Type | | HB Lodging | | | Family Tvlr | Biz/Mtg |
|--------------------------|-------------|------------|------------|------------|------------|---------------|--------------|------------|------------|------------|-------------|------------|
| | | So. CA | Other CA | U.S. | Int'l | Act. Sports | Lux. Leisure | Hot/Mot | Other Paid | Day Vis | | |
| Base: | 1511 | 622 | 111 | 587 | 191 | 360 | 459 | 382 | 150 | 775 | 444 | 113 |
| Personal car/truck/van | 60.2% | 87.7% | 65.5% | 32.5% | 18.9% | 55.3% | 54.8% | 37.3% | 25.0% | 67.0% | 62.8% | 35.0% |
| Commercial airline | 18.4% | 1.6% | 18.8% | 38.9% | 31.0% | 23.4% | 19.5% | 37.2% | 12.1% | 12.9% | 18.6% | 34.6% |
| Rental car/truck/van | 11.3% | 2.1% | 9.4% | 17.4% | 35.1% | 10.7% | 15.6% | 13.5% | 2.0% | 11.1% | 11.5% | 11.9% |
| Shared ride service | 2.2% | 1.1% | 1.4% | 2.6% | 5.9% | 1.4% | 2.5% | 3.0% | 0.6% | 1.9% | 1.6% | 5.7% |
| RV/motorhome | 1.1% | 1.4% | 0.4% | 1.3% | 0.1% | 1.2% | 0.7% | 0.2% | 52.6% | 0.9% | 1.6% | 0.3% |
| Public bus/Greyhound | 0.8% | 0.1% | 2.3% | 1.7% | 0.0% | 1.4% | 0.9% | 1.2% | 5.3% | 0.6% | 0.5% | 0.0% |
| Train/Amtrak | 0.6% | 0.1% | 1.5% | 1.3% | 0.0% | 0.8% | 0.1% | 2.8% | 0.0% | 0.1% | 0.5% | 4.9% |
| Tour bus/coach | 0.5% | 0.1% | 0.0% | 1.4% | 0.0% | 0.1% | 1.2% | 0.5% | 0.1% | 0.5% | 0.2% | 0.0% |
| Private/charter airplane | 0.4% | 0.1% | 0.0% | 0.4% | 2.3% | 1.3% | 1.0% | 0.8% | 0.5% | 0.4% | 0.2% | 1.0% |
| Cruise ship | 0.1% | 0.1% | 0.0% | 0.1% | 0.6% | 0.6% | 0.1% | 0.3% | 0.3% | 0.1% | 0.0% | 0.0% |
| Other | 4.3% | 5.7% | 0.5% | 2.3% | 6.1% | 3.6% | 3.6% | 3.2% | 1.5% | 4.5% | 2.6% | 6.6% |

MOST DROVE TO ARRIVE IN HUNTINGTON BEACH

- To arrive in Huntington Beach, 84% (86%) drove, of which 64% (67%) used a personal vehicle while 20% (19%) used a rental.
- Personal vehicle was the mode of choice for Californians and other U.S. visitors, while 51% (62%) of International visitors rented a vehicle, less so than in 2011.
- Of note, 9% each of U.S. and International visitors used a shared ride (Uber/Lyft).

Table 43 – Mode of Arrival into Huntington Beach

| | Total | Residence | | | | Activity Type | | HB Lodging | | | Family Tvlr | Biz/Mtg |
|---------------------------|-------------|------------|------------|------------|------------|---------------|--------------|------------|------------|------------|-------------|------------|
| | | So. CA | Other CA | U.S. | Int'l | Act. Sports | Lux. Leisure | Hot/Mot | Other Paid | Day Vis | | |
| Base: | 1511 | 622 | 111 | 587 | 191 | 360 | 459 | 382 | 150 | 775 | 444 | 113 |
| Personal/borrowed vehicle | 63.7% | 86.0% | 70.3% | 42.1% | 25.8% | 61.7% | 58.1% | 43.9% | 25.4% | 68.6% | 65.2% | 36.8% |
| Rental vehicle | 20.4% | 1.0% | 22.4% | 38.2% | 50.7% | 20.5% | 26.2% | 36.6% | 9.4% | 16.9% | 22.7% | 29.2% |
| Shared ride: Uber/Lyft | 4.9% | 1.7% | 1.7% | 9.1% | 8.9% | 4.2% | 4.8% | 8.0% | 2.1% | 4.2% | 3.4% | 13.8% |
| Walking | 2.1% | 3.2% | 1.3% | 0.8% | 1.8% | 1.4% | 2.1% | 1.4% | 2.1% | 2.3% | 2.8% | 3.1% |
| RV/motorhome | 0.8% | 1.3% | 0.4% | 0.3% | 0.2% | 2.2% | 1.3% | 0.0% | 57.3% | 0.4% | 0.8% | 0.0% |
| Hotel/airport shuttle | 0.7% | 0.1% | 1.8% | 1.7% | 0.1% | 0.6% | 0.6% | 2.3% | 0.6% | 0.4% | 0.6% | 5.2% |
| Tour bus | 0.7% | 0.4% | 0.0% | 1.3% | 0.6% | 1.0% | 1.8% | 0.6% | 0.0% | 0.6% | 0.2% | 0.0% |
| Bicycle | 0.7% | 1.2% | 0.0% | 0.1% | 0.2% | 2.3% | 0.1% | 0.1% | 0.0% | 0.8% | 0.2% | 0.0% |
| Limousine/ Taxi | 0.5% | 0.2% | 0.2% | 0.7% | 1.4% | 0.5% | 1.0% | 2.1% | 0.7% | 0.1% | 0.1% | 8.1% |
| Public bus/area shuttle | 0.4% | 0.2% | 0.0% | 0.2% | 2.4% | 1.0% | 0.4% | 0.6% | 0.1% | 0.4% | 0.5% | 0.0% |
| Other | 5.1% | 4.7% | 2.0% | 5.4% | 8.0% | 4.6% | 3.7% | 4.5% | 2.2% | 5.3% | 3.6% | 3.9% |

PEOPLE BOTH DROVE & WALKED TO GET AROUND HUNTINGTON BEACH

- As to how visitors got around Huntington Beach, still more, 45% (40%) drove a personal vehicle while 31% (55%) walked and 15% (14%) used their rental.
- A small number 3% (n/a) used shared rides and 3% (6%) biked to get around.

Table 44 – Mode to Get Around Huntington Beach

| | Total | Residence | | | | Activity Type | | HB Lodging | | | Family Tvlr | Biz/Mtg |
|---------------------------|-------------|------------|-------------|------------|------------|----------------|-----------------|------------|---------------|------------|----------------|------------|
| | | So. CA | Other CA | U.S. | Int'l | Act. Sports | Lux. Leisure | Hot/Mot | Other Paid | Day Vis | | |
| Base: | 1511 | 622 | 111 | 587 | 191 | 360 | 459 | 382 | 150 | 775 | 444 | 113 |
| Personal/borrowed vehicle | 45.3% | 58.7% | 57.9% | 30.8% | 21.3% | 46.6% | 39.8% | 35.3% | 27.4% | 47.3% | 45.2% | 33.5% |
| Walking | 31.0% | 32.1% | 26.1% | 31.5% | 27.7% | 20.4% | 35.3% | 20.0% | 33.8% | 34.0% | 30.2% | 21.9% |
| Rental vehicle | 15.2% | 1.1% | 13.3% | 27.7% | 40.9% | 16.2% | 17.1% | 32.8% | 8.9% | 11.4% | 18.6% | 23.1% |
| Shared ride: Uber/Lyft | 3.1% | 1.5% | 0.7% | 5.9% | 3.4% | 2.1% | 2.9% | 6.8% | 1.6% | 2.3% | 1.3% | 15.5% |
| Bicycle | 3.0% | 5.1% | 0.0% | 1.2% | 1.2% | 11.8% | 2.6% | 0.3% | 15.8% | 3.3% | 3.4% | 0.0% |
| Public bus | 0.8% | 0.0% | 1.2% | 0.9% | 3.7% | 1.4% | 0.2% | 0.5% | 0.3% | 0.9% | 0.0% | 0.0% |
| Tour bus/area shuttle | 0.4% | 0.0% | 0.2% | 1.0% | 0.4% | 0.2% | 0.1% | 1.9% | 0.1% | 0.0% | 0.5% | 1.0% |
| Limousine/ Taxi | 0.2% | 0.0% | 0.0% | 0.2% | 1.4% | 0.0% | 0.5% | 1.0% | 0.1% | 0.0% | 0.0% | 3.9% |
| RV/motorhome | 0.1% | 0.0% | 0.6% | 0.2% | 0.0% | 0.0% | 0.2% | 0.2% | 8.0% | 0.0% | 0.1% | 0.3% |
| Other | 0.9% | 1.4% | 0.0% | 0.6% | 0.0% | 1.2% | 1.3% | 1.1% | 4.0% | 0.8% | 0.7% | 0.8% |

MOST VISITORS GO TO THE BEACH IN HB

Discussed below and shown in the next table are the Huntington Beach activities in which visitors engaged.

- Nearly all 92% (98%) of visitors engaged in an activity while in Huntington Beach.
- The top activity, named by 43% (69%), was going to the beach, followed by 36% (47%) who were eating in restaurants, 29% (11%) socializing and 27% (37%) who shopped.
- The results suggest that although visitors may know Huntington Beach as a surfing mecca, many more go to the beach, yet fewer than in 2011, and do water activities with only 5% (6%) engaged in surfing.
- It is also noteworthy to look at activities by segment as differences can be seen among various groups and their activities suggest marketing messaging.

ACTIVITIES IN HUNTINGTON BEACH

Table 45 – Activities in Huntington Beach

| | Total | Residence | | | | Activity Type | | HB Lodging | | | Family Tvlr | Biz/Mtg |
|-------------------------------------|-------------|------------|------------|------------|------------|---------------|--------------|------------|------------|------------|-------------|------------|
| | | So. CA | Other CA | U.S. | Int'l | Act. Sports | Lux. Leisure | Hot/Mot | Other Paid | Day Vis | | |
| Base: | 1511 | 622 | 111 | 587 | 191 | 360 | 459 | 382 | 150 | 775 | 444 | 113 |
| Going to the beach | 42.7% | 37.5% | 44.6% | 46.0% | 54.3% | 46.7% | 54.8% | 51.1% | 40.7% | 40.7% | 44.3% | 28.2% |
| Eating in restaurants | 36.3% | 30.9% | 35.4% | 43.2% | 39.7% | 33.5% | 59.3% | 44.8% | 33.7% | 34.2% | 39.6% | 37.9% |
| Just visit/socialize | 28.7% | 28.0% | 29.7% | 32.0% | 21.7% | 23.5% | 27.4% | 25.1% | 49.6% | 29.0% | 29.8% | 15.7% |
| Shopping | 27.2% | 21.2% | 27.6% | 29.8% | 45.3% | 33.7% | 92.4% | 33.7% | 27.0% | 25.7% | 28.7% | 21.8% |
| Sightsee/explore the area | 21.2% | 17.1% | 18.4% | 25.8% | 27.5% | 22.3% | 29.6% | 20.5% | 23.0% | 21.3% | 19.0% | 13.4% |
| Bicycling | 11.4% | 13.5% | 11.6% | 7.8% | 12.3% | 57.7% | 16.6% | 10.5% | 29.9% | 10.9% | 11.8% | 4.8% |
| Beach bonfire | 10.3% | 14.1% | 6.8% | 5.9% | 9.2% | 23.0% | 13.7% | 13.9% | 11.9% | 9.0% | 8.5% | 15.5% |
| Nightclubs/bars/nightlife | 6.1% | 6.1% | 4.5% | 5.1% | 10.1% | 11.8% | 13.0% | 8.4% | 6.0% | 5.1% | 3.3% | 8.7% |
| Surfing/surf school/surfing contest | 4.9% | 4.9% | 5.8% | 4.1% | 6.8% | 25.0% | 6.8% | 5.9% | 4.9% | 4.6% | 4.0% | 7.3% |
| Family or school reunion | 4.7% | 4.7% | 4.8% | 4.9% | 4.7% | 9.7% | 6.8% | 7.3% | 0.3% | 4.1% | 6.2% | 0.3% |
| Eco tourism/birding | 4.4% | 6.4% | 2.4% | 3.0% | 1.5% | 2.9% | 0.8% | 1.9% | 2.3% | 5.1% | 3.2% | 1.9% |
| Skating | 4.0% | 4.3% | 5.2% | 1.8% | 8.5% | 20.4% | 5.3% | 5.4% | 0.2% | 3.7% | 1.9% | 4.3% |
| Attend live music, play or dance | 3.6% | 4.2% | 0.6% | 3.8% | 2.3% | 6.8% | 6.7% | 5.9% | 3.0% | 2.8% | 1.5% | 3.2% |
| Visit museums/galleries | 3.6% | 3.3% | 4.0% | 2.8% | 6.6% | 6.8% | 7.3% | 4.9% | 2.8% | 3.2% | 2.6% | 5.8% |
| Attend a festival/special event | 3.5% | 3.8% | 2.1% | 3.4% | 3.1% | 8.3% | 6.5% | 5.3% | 5.5% | 3.0% | 2.0% | 3.7% |
| Spa/beauty/health club | 2.8% | 3.1% | 2.3% | 2.5% | 2.6% | 7.6% | 9.4% | 4.2% | 1.4% | 2.5% | 3.1% | 0.7% |
| Attend a meeting/conference | 2.7% | 2.0% | 0.2% | 4.5% | 2.5% | 3.8% | 3.9% | 6.6% | 1.2% | 1.9% | 0.8% | 21.8% |
| Conduct business | 2.7% | 2.3% | 2.8% | 3.5% | 1.9% | 3.7% | 4.2% | 7.2% | 7.6% | 1.6% | 0.9% | 26.8% |
| Paddle boarding | 2.0% | 2.6% | 0.9% | 1.8% | 0.7% | 10.1% | 2.5% | 1.8% | 2.5% | 1.9% | 0.8% | 7.4% |
| Kayaking | 1.7% | 1.8% | 2.5% | 1.4% | 1.9% | 8.7% | 2.4% | 4.3% | 0.4% | 0.9% | 1.1% | 2.3% |
| Golfing | 1.5% | 0.9% | 1.9% | 2.2% | 1.2% | 4.1% | 4.9% | 3.1% | 3.4% | 1.1% | 1.2% | 0.3% |
| Boating/sailing | 1.3% | 1.3% | 2.4% | 1.1% | 1.3% | 6.8% | 2.9% | 3.1% | 0.3% | 0.9% | 1.0% | 1.9% |
| Wedding | 1.3% | 0.2% | 0.4% | 3.0% | 1.9% | 1.6% | 1.6% | 2.7% | 0.9% | 0.9% | 1.1% | 0.0% |
| Gondola ride at Sunset Beach | 0.8% | 1.4% | 1.0% | 0.3% | 0.0% | 2.8% | 1.7% | 0.2% | 2.3% | 1.0% | 0.8% | 2.4% |
| Other Area attractions/amusements | 5.1% | 3.5% | 7.1% | 6.4% | 6.8% | 3.0% | 6.6% | 5.6% | 0.4% | 5.1% | 6.0% | 4.5% |
| None of the above/no activities | 8.4% | 10.4% | 2.8% | 7.2% | 6.8% | 0.0% | 0.0% | 4.0% | 2.1% | 9.6% | 7.9% | 10.3% |

VISITORS ATTENDED VARIOUS SPECIAL EVENTS

- Overall 4% (n/a) of visitors went to a special event.
 - Note, attendance at events is effected by timing of the visit in Huntington Beach; some may attend specifically or may attend unplanned when here and it is occurring.
- The main events attended were the U.S. Open of Surfing by 9%, Surf City Nights by 7%, Surf City Surf Dog Contest by 5% and the Marathon by nearly 5%.

Table 46 – Huntington Beach Special Event Attended

| | Total | Residence | | | | Activity Type | | HB Lodging | | | Family Tvlr | Biz/Mtg |
|---|-----------|-----------|----------|-----------|----------|---------------|--------------|------------|------------|-----------|-------------|----------|
| | | So. CA | Other CA | U.S. | Int'l | Act. Sports | Lux. Leisure | Hot/Mot | Other Paid | Day Vis | | |
| Base: Attending special event | 73 | 24 | 5 | 35 | 9 | 29 | 33 | 25 | 11 | 26 | 15 | 5 |
| US Open of Surfing | 8.6% | 11.2% | 0.4% | 8.0% | 0.0% | 13.0% | 13.3% | 3.0% | 2.0% | 10.4% | 0.0% | 21.9% |
| Surf City Nights (every Tues). | 6.7% | 3.4% | 0.0% | 13.9% | 4.1% | 4.9% | 9.3% | 16.7% | 3.3% | 3.0% | 0.0% | 0.0% |
| Surf City Surf Dog Contest | 5.3% | 9.4% | 1.0% | 0.8% | 0.0% | 11.4% | 9.6% | 0.0% | 4.0% | 7.5% | 0.0% | 0.0% |
| Surf City USA Marathon | 4.5% | 1.5% | 37.5% | 6.6% | 0.0% | 2.3% | 1.9% | 12.1% | 2.6% | 0.0% | 10.2% | 0.0% |
| Surfin' Sundays Concert Series (May - Sept) | 2.9% | 1.0% | 0.0% | 6.2% | 4.0% | 2.0% | 3.6% | 1.5% | 0.7% | 3.0% | 0.0% | 0.0% |
| HB Air Show | 2.1% | 0.0% | 0.0% | 6.4% | 0.0% | 2.3% | 3.8% | 3.0% | 0.7% | 1.5% | 0.0% | 0.0% |
| BB Jazz Festival | 1.0% | 1.9% | 0.0% | 0.0% | 0.2% | 0.1% | 0.0% | 0.0% | 2.0% | 1.5% | 0.1% | 0.0% |
| California Food & Wine Festival | 0.8% | 0.0% | 0.0% | 2.5% | 0.0% | 1.7% | 1.5% | 3.0% | 0.7% | 0.0% | 0.0% | 0.0% |
| 4th of July Parade | 0.8% | 1.0% | 0.0% | 0.8% | 0.3% | 1.7% | 0.5% | 0.0% | 3.3% | 0.0% | 0.0% | 0.0% |
| Concours d'Elegance Classic Car & Motorcycle Show | 0.0% | 0.0% | 0.0% | 0.0% | 0.2% | 0.1% | 0.0% | 0.0% | 2.0% | 0.0% | 0.1% | 0.0% |
| IMG Surf City Escape Series Triathlon | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.7% | 0.0% | 0.0% | 0.0% |
| SoCal Corgi Nation Beach Day | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.7% | 0.0% | 0.0% | 0.0% |
| Other | 86.1% | 91.9% | 61.1% | 78.3% | 91.5% | 92.9% | 86.6% | 78.8% | 86.1% | 91.0% | 89.7% | 78.1% |

THE BEACHES AND THE PIER WERE THE MOST POPULAR SITES

Specific Huntington Beach venues visited are discussed below and shown in the next slide.

- Almost all 90% (97%) of Huntington Beach visitors went to at least one Huntington Beach venue or attraction.
- Of total visitors, nearly half 48% (55%) visited the Downtown/Main Street area, 45% (66%) went to the Pier and 42% (68%) went to a city or state beach.
 - No other attraction or venue came close to these top 3, but it notable that visitation to each one was much lower in 2018 than in 2011.
 - As well venues visited varies by segment compared to the Total and other segments; more Other U.S. and Luxury Leisure visitors went downtown and to the Pier while more International visitors and Other Paid lodging guests went to the beach.

SPECIFIC HUNTINGTON BEACH VENUES/ ATTRACTIONS VISITED

Table 47 – Specific Huntington Beach Venues/Attractions Visited

| | Total | Residence | | | | Activity Type | | HB Lodging | | | Family Tvlr | Biz/Mtg |
|---|-------------|------------|-------------|------------|------------|----------------|-----------------|------------|---------------|------------|----------------|------------|
| | | So. CA | Other CA | U.S. | Int'l | Act. Sports | Lux. Leisure | Hot/Mot | Other Paid | Day Vis | | |
| Base: | 1511 | 622 | 111 | 587 | 191 | 360 | 459 | 382 | 150 | 775 | 444 | 113 |
| Downtown/Main Street | 48.2% | 43.4% | 44.7% | 55.2% | 50.8% | 52.6% | 68.0% | 62.8% | 55.2% | 43.8% | 50.7% | 43.0% |
| Huntington Beach PIER | 44.8% | 33.1% | 43.3% | 60.2% | 52.1% | 45.9% | 62.7% | 46.4% | 55.4% | 44.5% | 46.1% | 42.8% |
| Huntington Beach City beach or California State beach | 32.7% | 30.0% | 27.9% | 32.4% | 47.8% | 41.5% | 37.3% | 37.5% | 64.1% | 31.0% | 35.8% | 23.7% |
| Pacific City | 13.5% | 12.8% | 10.8% | 15.1% | 13.5% | 15.1% | 22.7% | 12.0% | 32.7% | 13.1% | 12.7% | 20.7% |
| Huntington Beach Dog Beach | 9.6% | 11.5% | 9.9% | 7.0% | 9.2% | 15.5% | 10.4% | 9.3% | 9.8% | 9.4% | 7.7% | 3.4% |
| Bella Terra center | 4.6% | 3.4% | 7.7% | 5.1% | 5.7% | 8.6% | 7.2% | 7.8% | 4.1% | 3.0% | 3.4% | 9.1% |
| Central Park (Shipley Nature Center, Disc Golf, equestrian center, Secret Garden, Library Theater, etc.) | 3.1% | 3.9% | 1.9% | 1.8% | 4.0% | 3.1% | 3.1% | 1.9% | 2.3% | 3.3% | 2.4% | 1.0% |
| 5th & Pacific Coast Highway | 2.5% | 1.5% | 2.0% | 4.2% | 2.4% | 5.2% | 4.9% | 4.4% | 3.5% | 2.0% | 2.4% | 1.0% |
| Surfer's Walk of Fame/Hall of Fame | 2.5% | 1.9% | 0.2% | 2.3% | 7.4% | 6.0% | 4.3% | 2.9% | 7.1% | 2.3% | 2.4% | 6.2% |
| International Surfing Museum | 1.8% | 1.3% | 1.0% | 1.5% | 5.0% | 3.8% | 3.1% | 1.8% | 6.7% | 1.4% | 1.5% | 0.3% |
| Newland House Museum | 1.0% | 0.4% | 0.0% | 0.2% | 6.5% | 2.6% | 1.5% | 0.5% | 5.4% | 1.1% | 0.7% | 0.0% |
| Other | 7.6% | 11.4% | 12.6% | 2.9% | 2.1% | 13.3% | 3.7% | 2.9% | 4.2% | 9.0% | 7.0% | 0.0% |
| None/not visiting area attractions | 10.2% | 12.3% | 7.4% | 9.5% | 5.2% | 3.0% | 2.2% | 11.7% | 4.7% | 10.1% | 7.8% | 18.5% |

OVER ONE-FIFTH STAYED OVERNIGHT IN HUNTINGTON BEACH

Whether visitors were in Huntington Beach for the day or staying overnight is discussed and shown below.

- More than half, or 58% (55%) of all visitors were staying overnight somewhere on their trip, and thus 42% (45%) were solely on a day trip.
- Of all Huntington Beach visitors, 23% (20%) stayed overnight here.
- As well, 36% (31%) stayed in other Orange County locations (either instead of or in addition to Huntington Beach), while 27% (18%) stayed in locations outside Orange County.
- Overnight visitation in Huntington Beach was highest by business travelers at 53% and by 37% of Other U.S. visitors.

Table 48 – Overnight Stays on This Trip

| | Total | Residence | | | | Activity Type | | HB Lodging | | | Family Tvlr | Biz/Mtg |
|----------------------------------|--------------|--------------|--------------|--------------|--------------|----------------|-----------------|---------------|---------------|-------------|----------------|--------------|
| | | So. CA | Other CA | U.S. | Int'l | Act. Sports | Lux. Leisure | Hot | Other Paid | Day Vis | | |
| Base: Visitors | 1511 | 622 | 111 | 587 | 191 | 360 | 459 | 382 | 150 | 775 | 444 | 113 |
| % staying overnight in... | | | | | | | | | | | | |
| Overall | 58.2% | 19.8% | 90.5% | 95.7% | 93.5% | 58.1% | 70.6% | 100.0% | 100.0% | 45.9% | 64.6% | 76.7% |
| Huntington Beach | 22.6% | 10.0% | 32.8% | 36.6% | 29.7% | 30.6% | 27.8% | 100.0% | 100.0% | 0.0% | 25.0% | 53.4% |
| Orange County area | 36.1% | 11.0% | 61.6% | 62.4% | 52.0% | 36.9% | 45.3% | 41.9% | 24.4% | 33.6% | 40.1% | 35.9% |
| Other locations/destinations | 26.6% | 7.4% | 28.3% | 41.9% | 63.6% | 25.9% | 32.6% | 36.0% | 16.2% | 23.4% | 29.3% | 21.6% |
| Not staying overnight | 41.8% | 80.2% | 9.5% | 4.3% | 6.5% | 41.9% | 29.4% | 0.0% | 0.0% | 54.1% | 35.4% | 23.3% |

OVERNIGHT VISITORS STAYED 1.4 NIGHTS ON AVERAGE IN HUNTINGTON BEACH

Overnight visitors reported the number of nights * they stayed in Huntington Beach, other Orange County areas, other areas, and overall on this trip.

- Visitors staying overnight *anywhere* on their trip stayed an average of 4.7 nights away from home, shorter than the 6.3 nights on trips in 2011.
- The average nights stayed in Huntington Beach for all visitors (day and overnight) was 0.8 (0.7) nights.
- All Huntington Beach overnight guests stayed here an average of 1.4 (3.5) nights.
 - International overnight visitors stayed here 1.4 (5.9) nights average, Other U.S. visitors stayed 1.4 (3.9) average nights, while Other Californians averaged 1.0 (2.3) nights.
 - Thus length of stay (nights) in Huntington Beach is significantly lower than in 2011.
 - Hotel guests averaged 3.1 (3.2) nights in Huntington Beach while Other lodging guests averaged 5.4 (5.2) nights.

* this represents *nights* and is lower than the number of *days* stay reported in the economic impact section.

LENGTH OF STAY IN HUNTINGTON BEACH

Table 49a – Length of Stay (All HB Visitors)

| Mean # nights | Total | Residence | | | | Activity Type | | HB Lodging | | | Family Tvlr | Biz/Mtg |
|---|-------------|-------------|-------------|-------------|--------------|----------------|-----------------|-------------|---------------|-------------|----------------|-------------|
| | | So. CA | Other CA | U.S. | Int'l | Act. Sports | Lux. Leisure | Hot | Other Paid | Day Vis | | |
| Base: All HB visitors | 1511 | 622 | 111 | 587 | 191 | 360 | 459 | 382 | 150 | 775 | 444 | 113 |
| Total | 4.68 | 0.95 | 4.73 | 7.15 | 13.55 | 6.26 | 6.22 | 6.51 | 13.60 | 3.60 | 4.81 | 4.31 |
| Nights in Orange County area | 2.07 | 0.32 | 2.64 | 3.58 | 4.87 | 2.57 | 2.59 | 1.34 | 2.65 | 2.13 | 2.11 | 1.42 |
| Nights in all other locations/destinations | 1.81 | 0.35 | 1.18 | 2.19 | 7.37 | 2.54 | 2.53 | 2.13 | 5.58 | 1.47 | 1.88 | 1.04 |
| Nights in Huntington Beach | 0.80 | 0.27 | 0.91 | 1.37 | 1.32 | 1.16 | 1.09 | 3.05 | 5.38 | 0.00 | 0.82 | 1.84 |

Table 49b – Length of Stay (Overnight HB Visitors)

| Mean # Nights | Total | Residence | | | | Activity Type | | HB Lodging | | | Family Tvlr | Biz/Mtg |
|---|-------------|-------------|-------------|-------------|--------------|----------------|-----------------|-------------|---------------|-------------|----------------|-------------|
| | | So. CA | Other CA | U.S. | Int'l | Act. Sports | Lux. Leisure | Hot | Other Paid | Day Vis | | |
| Base: Overnight HB visitors | 1094 | 231 | 104 | 575 | 184 | 284 | 377 | 382 | 150 | 358 | 331 | 99 |
| Total | 8.04 | 4.78 | 5.23 | 7.46 | 14.49 | 10.77 | 8.81 | 6.51 | 13.60 | 7.85 | 7.44 | 5.62 |
| Nights in Orange County area | 3.56 | 1.62 | 2.92 | 3.74 | 5.20 | 4.42 | 3.67 | 1.34 | 2.65 | 4.64 | 3.26 | 1.86 |
| Nights in all other locations/destinations | 3.11 | 1.78 | 1.30 | 2.29 | 7.88 | 4.37 | 3.59 | 2.13 | 5.58 | 3.21 | 2.91 | 1.36 |
| Nights in Huntington Beach | 1.37 | 1.38 | 1.01 | 1.43 | 1.41 | 1.99 | 1.55 | 3.05 | 5.38 | 0.00 | 1.27 | 2.40 |

MOST OVERNIGHT HUNTINGTON BEACH VISITORS STAYED IN HOTEL LODGING

- Among *all* visitors, 18% (13%) stayed in Hotel lodging, with few in other lodging types.
- Of *overnight* Huntington Beach visitors, 77% (63%) lodged in a hotel/motel, 19% (24%) stayed in a private residence (unpaid) of friends or family, and 4% (11%) stayed in Other paid lodging.
- Longer-haul Huntington Beach *overnight* visitors had higher use of hotel/motel lodging specifically, by 86% (73%) of Other Californians, 80% (66%) of Other U.S. and 84% (72%) of International visitors, all well above levels in 2011.

Table 50 – Type of Lodging in Huntington Beach

| | Total | Residence | | | | Activity Type | | HB Lodging | | | Family Tvlr | Biz/Mtg |
|------------------------------------|--------------|--------------|--------------|--------------|--------------|----------------|-----------------|---------------|---------------|-------------|----------------|--------------|
| | | So. CA | Other CA | U.S. | Int'l | Act. Sports | Lux. Leisure | Hot/Mot | Other Paid | Day Vis | | |
| Base: visitors | 1511 | 622 | 111 | 587 | 191 | 360 | 459 | 382 | 150 | 775 | 444 | 113 |
| Day Visitor | 77.4% | 90.0% | 67.2% | 63.4% | 70.3% | 69.4% | 72.2% | 0.0% | 0.0% | 100.0% | 75.0% | 46.6% |
| Hotel/motel/inn | 17.5% | 6.3% | 28.1% | 29.2% | 25.1% | 22.4% | 22.8% | 100.0% | 0.0% | 0.0% | 20.6% | 50.3% |
| Private home (unpaid) | 4.3% | 2.7% | 4.1% | 6.7% | 4.2% | 6.7% | 4.2% | 0.0% | 0.0% | 0.0% | 3.8% | 2.5% |
| Other Paid Lodging | 0.8% | 1.0% | 0.6% | 0.8% | 0.4% | 1.5% | 0.8% | 0.0% | 100.0% | 0.0% | 0.7% | 0.6% |
| Base: HB Overnight Visitors | 736 | 182 | 70 | 376 | 108 | 221 | 247 | 382 | 150 | * | 206 | 80 |
| Hotel/motel/inn | 77.4% | 63.0% | 85.7% | 79.7% | 84.4% | 73.0% | 81.9% | 100.0% | 0.0% | * | 82.4% | 94.2% |
| Private home (unpaid) | 18.9% | 26.8% | 12.6% | 18.2% | 14.3% | 21.9% | 15.2% | 0.0% | 0.0% | * | 15.0% | 4.6% |
| Other Paid Lodging | 3.7% | 10.2% | 1.8% | 2.1% | 1.3% | 5.0% | 2.9% | 0.0% | 100.0% | * | 2.6% | 1.2% |

OVER 7 IN 10 HOTEL GUESTS RESERVED ON-LINE

- In total 74% (60%) of Huntington Beach hotel guests made their reservations through the Internet. Of these, 58% (44%) used the hotel website, 14% (14%) used a general travel website, and 2% (2%) went through surfcityusa.com website.
- In terms of the few non-internet bookings, only 3% this year (5%) called the hotel's reservation line, 6% (6%) went through a local personal contact, and 7% (6%) reserved via their company.

Table 5I - How Hotel Reservation was Made

| | Total | Residence | | | | Activity Type | | Family Tvlr | Biz/Mtg |
|---|------------|-----------|-----------|------------|-----------|---------------|--------------|-------------|-----------|
| | | So. CA | Other CA | U.S. | Int'l | Act. Sports | Lux. Leisure | | |
| Base: HB Hotel/Motel Guests | 382 | 62 | 44 | 220 | 56 | 97 | 142 | 130 | 66 |
| On the hotel's Internet site | 57.6% | 62.4% | 70.5% | 57.0% | 44.8% | 53.4% | 62.0% | 65.2% | 32.9% |
| On a travel Internet site like hotels.com, Travelocity etc. | 14.3% | 11.5% | 9.6% | 16.0% | 15.4% | 14.4% | 16.6% | 15.8% | 4.5% |
| My company booked it | 6.5% | 9.6% | 0.7% | 6.6% | 7.0% | 4.5% | 5.0% | 0.4% | 41.3% |
| Local friend, relative or colleague | 5.5% | 0.9% | 11.0% | 4.7% | 9.0% | 3.5% | 7.6% | 6.3% | 0.6% |
| Through a travel agent/AAA | 3.9% | 2.3% | 0.0% | 4.0% | 8.0% | 2.9% | 2.5% | 3.1% | 9.7% |
| Through my/our tour arranger or operator | 3.7% | 0.0% | 0.7% | 2.8% | 12.9% | 9.9% | 1.1% | 0.3% | 9.7% |
| By call to the hotel or hotel's '800' reservation # | 2.6% | 5.5% | 4.1% | 1.5% | 2.0% | 4.5% | 0.6% | 1.6% | 0.6% |
| Visit Huntington Beach surfcityusa.com | 2.3% | 4.6% | 0.0% | 2.7% | 0.0% | 3.5% | 1.5% | 3.1% | 0.6% |
| Other (Specify) | 3.7% | 3.2% | 3.4% | 4.7% | 1.0% | 3.5% | 3.2% | 4.1% | 0.0% |

8 OF 10 VISITORS SPENT MONEY IN HB BUT FEWER THAN IN 2011

- An 82% majority of visitors were spending money in Huntington Beach the day they were interviewed; however this is lower than the 94% in 2011.
 - Spending incidence in the destination that day ranged from a high of 95% for International, Luxury Leisure and Hotel guests to a low of 72% of Southern Californians.
- The highest incidence category by was food/snacks (out) by 65% (70%), followed by 41% (57%) spending on drinks/beverages and 31% (39%) who were buying retail items/gifts.
- In general Luxury Leisure and Hotel guests reported highest spending incidence for most categories as compared to the Total and other segments.
 - Of note 58% of Luxury Leisure and 43% each of Other U.S. and International visitors spent on shopping/retail.
- Conversely, Southern Californians and Other Lodging guests had lower spending incidence for most categories as compared to the Total and other segments.
- This year 14% (12%) paid for lodging that day, consistent with the higher share staying in hotels versus 2011.
- More Hotel guests reported spending in almost every category compared to Total visitors and other segments except for shopping.

MOST VISITORS SPENT MONEY IN HUNTINGTON BEACH

Table 52 – Spending Incidence by Purchase Category

| | Total | Residence | | | | Activity Type | | HB Lodging | | | Family Tvlr | Biz/Mtg |
|--|-------------|------------|------------|------------|------------|---------------|--------------|------------|------------|------------|-------------|------------|
| | | So. CA | Other CA | U.S. | Int'l | Act. Sports | Lux. Leisure | Hot/Mot | Other Paid | Day Vis | | |
| Base: | 1511 | 622 | 111 | 587 | 191 | 360 | 459 | 382 | 150 | 775 | 444 | 113 |
| Meals out/snacks | 64.9% | 56.9% | 69.5% | 74.2% | 69.5% | 62.8% | 76.3% | 71.6% | 53.5% | 63.3% | 68.6% | 67.4% |
| Drinks/beverages | 41.5% | 37.7% | 31.9% | 46.2% | 50.7% | 48.5% | 58.0% | 49.2% | 22.9% | 39.5% | 39.3% | 34.8% |
| Shopping/Gifts/Souvenirs | 31.0% | 20.7% | 28.1% | 42.9% | 43.2% | 33.5% | 58.3% | 36.6% | 21.3% | 29.5% | 35.2% | 27.7% |
| Hotel/paid lodging in H B (per night) | 13.9% | 4.5% | 24.5% | 21.8% | 24.5% | 20.2% | 18.5% | 65.9% | 7.3% | 2.6% | 16.1% | 30.7% |
| Local transportation (gas, transit, parking, etc.) | 11.3% | 10.8% | 2.5% | 12.3% | 15.9% | 17.8% | 13.1% | 13.3% | 3.6% | 11.3% | 9.7% | 6.5% |
| Groceries/personal/other items | 6.3% | 5.4% | 7.4% | 7.6% | 5.6% | 7.6% | 7.8% | 9.2% | 7.3% | 5.2% | 6.9% | 6.6% |
| Attraction/museums/clubs/entertainment | 4.1% | 4.3% | 5.2% | 4.2% | 2.2% | 4.3% | 5.3% | 9.8% | 1.1% | 2.7% | 3.0% | 1.6% |
| Activity or lessons fees, equipment, rentals | 2.5% | 1.7% | 1.7% | 2.7% | 5.4% | 3.8% | 3.6% | 5.1% | 2.0% | 1.7% | 3.0% | 1.1% |
| Amenities like spa, beauty or health club | 1.3% | 1.2% | 0.5% | 2.1% | 0.2% | 1.7% | 3.6% | 2.5% | 0.8% | 1.1% | 1.7% | 6.1% |
| None of the above | 18.0% | 27.6% | 15.4% | 9.0% | 4.6% | 10.1% | 4.6% | 5.3% | 25.4% | 21.3% | 16.7% | 12.8% |

* The share (incidence) spending by segment is 100% less the percentage of none of the above

VISITOR GROUPS SPENT FAR MORE THAN IN 2011, \$259 (\$105) DAILY AVERAGE IN HB

Spending amount by visitor groups in total and by category (as applied to all groups whether or not they spent in a specific category) is detailed below and charted on the next slide:

- Average total daily spending across visitor groups in Huntington Beach was \$259 (\$105).
- Hotel guests had the highest average daily spending at \$570 (\$313), followed by Business travelers at \$385 (\$136), while Family travelers averaged \$384 (n/a), and Luxury Leisure groups spent \$344 (n/a).
- The highest-yield categories per group were:
 - \$74 (\$17) for paid lodging (not room rate)
 - \$83 (\$36) for meals and snacks (also the category most purchased)
 - \$43 (\$29) for shopping

VISITOR GROUPS SPENT \$144 DAILY IN HUNTINGTON BEACH

Table 53 – 2018 Per-Group Daily Spending in Huntington Beach

| Mean spending | Total | Residence | | | | Activity Type | | HB Lodging | | | Family Tvlr | Biz/Mtg |
|--|---------------|---------------|---------------|---------------|---------------|----------------|-----------------|---------------|---------------|---------------|----------------|---------------|
| | | So. CA | Other CA | U.S. | Int'l | Act. Sports | Lux. Leisure | Hot/Mot | Other Paid | Day Vis | | |
| Base: | 1511 | 622 | 111 | 587 | 191 | 360 | 459 | 382 | 150 | 775 | 444 | 113 |
| Total (\$) | 259.21 | 146.26 | 334.42 | 318.69 | 321.76 | 292.41 | 344.11 | 569.87 | 335.13 | 103.72 | 383.61 | 365.29 |
| Meals out/snacks | 82.66 | 54.62 | 114.96 | 95.97 | 96.46 | 98.57 | 95.84 | 159.01 | 144.53 | 43.51 | 131.28 | 108.47 |
| Hotel/paid lodging in HB (per night) | 73.53 | 31.90 | 108.20 | 96.08 | 91.65 | 88.86 | 90.31 | 227.92 | 102.21 | 0.00 | 91.33 | 160.76 |
| Shopping/Gifts/Souvenirs | 42.75 | 19.14 | 39.63 | 53.20 | 69.95 | 40.39 | 78.04 | 64.48 | 23.44 | 30.37 | 74.85 | 37.73 |
| Drinks/beverages | 29.47 | 19.73 | 37.29 | 35.67 | 31.11 | 34.09 | 37.28 | 59.17 | 52.50 | 14.68 | 41.51 | 31.49 |
| Local transportation (gas, car rental, transit, parking, etc.) | 10.46 | 7.74 | 9.82 | 11.70 | 13.63 | 12.38 | 11.20 | 21.44 | 3.30 | 6.00 | 12.53 | 16.49 |
| Groceries/personal/other items | 8.89 | 6.39 | 9.25 | 10.45 | 10.13 | 12.29 | 11.54 | 12.98 | 6.65 | 4.76 | 10.71 | 4.01 |
| Attraction/museums/clubs/entertainment | 5.03 | 3.46 | 9.52 | 6.43 | 2.71 | 1.84 | 5.23 | 11.69 | 0.78 | 1.04 | 10.61 | 0.29 |
| Amenities: spa, beauty or health club | 3.92 | 1.56 | 3.82 | 6.96 | 0.72 | 2.25 | 11.19 | 9.98 | 0.97 | 1.08 | 6.43 | 6.04 |
| Activity/lessons fees, equipment, rentals | 2.50 | 1.72 | 1.92 | 2.23 | 5.40 | 1.75 | 3.47 | 3.21 | 0.74 | 2.29 | 4.37 | 0.02 |

EACH VISITOR SPENT \$92 (\$62) PER DAY

Per-capita daily spending is detailed below and on the next slide.

- Overall, each visitor spent an average of \$92 (\$62) *per-person* per day in Huntington Beach.
- The highest value category in terms of per-person spending was meals/snacks out at \$29 (\$20), with \$26 (\$16) for paid lodging and shopping/retail items at \$15 (\$15).
- Again, and as may be expected, Hotel guests spent the most per-person, at \$186 (\$136) for the day, including \$74 (\$57) for the lodging itself, with Business travelers next highest spending an average of \$176 (\$130)
- Daily per-person both Other U.S. at \$117 (\$71) and International visitors also at \$117 (\$79) far outspent Southern Californians at \$50 (\$24), while Other Californians spent \$105 (\$94)
 - The higher spending by longer-haul visitors is consistent with more staying overnight in Huntington Beach, more likely to use hotels/motels when staying and to spend more in the destination.

DAILY PER CAPITA SPENDING BY CATEGORY

Table 54 – Daily Per Capita Spending

| Mean spending per person | Total | Residence | | | | Activity Type | | HB Lodging | | | Family Tvlr | Biz/Mtg |
|--|--------------|--------------|---------------|---------------|---------------|---------------|---------------|---------------|--------------|--------------|--------------|---------------|
| | | So. CA | Other CA | U.S. | Int'l | Act. Sports | Lux. Leisure | Hot/Mot | Other Paid | Day Vis | | |
| Base: Buyer | 1511 | 622 | 111 | 587 | 191 | 360 | 459 | 382 | 150 | 775 | 444 | 113 |
| Total (\$) | 91.95 | 50.48 | 105.21 | 117.14 | 116.51 | 111.97 | 117.95 | 185.80 | 95.22 | 36.21 | 83.49 | 175.67 |
| Meals out/snacks | 29.32 | 18.85 | 36.17 | 35.27 | 34.93 | 37.74 | 32.85 | 51.84 | 41.07 | 15.19 | 28.57 | 52.17 |
| Hotel/paid lodging (per night in H B.) | 26.08 | 11.01 | 34.04 | 35.32 | 33.19 | 34.03 | 30.96 | 74.31 | 29.04 | 0.00 | 19.88 | 77.31 |
| Shopping/Gifts/Souvenirs | 15.17 | 6.61 | 12.47 | 19.55 | 25.33 | 15.47 | 26.75 | 21.02 | 6.66 | 10.60 | 16.29 | 18.14 |
| Drinks/beverages | 10.45 | 6.81 | 11.73 | 13.11 | 11.27 | 13.05 | 12.78 | 19.29 | 14.92 | 5.12 | 9.03 | 15.14 |
| Local transportation (gas, car rental, transit, parking, etc.) | 3.71 | 2.67 | 3.09 | 4.30 | 4.94 | 4.74 | 3.84 | 6.99 | 0.94 | 2.09 | 2.73 | 7.93 |
| Groceries/personal/other items | 3.15 | 2.21 | 2.91 | 3.84 | 3.67 | 4.71 | 3.96 | 4.23 | 1.89 | 1.66 | 2.33 | 1.93 |
| Attraction/museum/entertainment admissions | 1.78 | 1.19 | 3.00 | 2.36 | 0.98 | 0.71 | 1.79 | 3.81 | 0.22 | 0.36 | 2.31 | 0.14 |
| Amenities (spa, beauty, health club | 1.39 | 0.54 | 1.20 | 2.56 | 0.26 | 0.86 | 3.84 | 3.25 | 0.27 | 0.38 | 1.40 | 2.91 |
| Activity or lessons fees, equipment, rentals | 0.89 | 0.59 | 0.60 | 0.82 | 1.95 | 0.67 | 1.19 | 1.05 | 0.21 | 0.80 | 0.95 | 0.01 |

Section 6c

Traveler Characteristics and Demographics

HALF OF HUNTINGTON BEACH VISITOR GROUPS ARE FAMILIES

- Of Huntington Beach total visitors 48% traveled as a family, a notable rise from 37% in 2011.
- Another 19% (24%) were couples, with 18% (15%) in a group of friends/co-workers and just 8% (14%) who traveled alone.
- Fewer 40% of Southern Californians were traveling as a family, as compared to 66% of Other Californians and 52% of Other U.S. visitors.
- 55% of Hotel guests were families as were 49% of Luxury Leisure travelers but also 24% of them were couples.

Table 55 – Composition of (immediate)Travel Group

| | Total | Residence | | | | Activity Type | | HB Lodging | | | Family Tvlr | Biz/Mtg |
|--|-------------|------------|-------------|------------|------------|----------------|-----------------|------------|---------------|------------|----------------|------------|
| | | So. CA | Other CA | U.S. | Int'l | Act. Sports | Lux. Leisure | Hot/Mot | Other Paid | Day Vis | | |
| Base: | 1511 | 622 | 111 | 587 | 191 | 360 | 459 | 382 | 150 | 775 | 444 | 113 |
| A family group | 46.6% | 40.4% | 66.2% | 52.3% | 44.4% | 39.7% | 48.5% | 54.9% | 36.7% | 45.2% | 100.0% | 6.8% |
| A couple | 18.6% | 18.7% | 15.1% | 19.2% | 18.4% | 20.3% | 23.9% | 16.3% | 32.6% | 18.7% | 0.0% | 22.5% |
| Group of friends/co-workers/colleagues | 17.9% | 22.6% | 11.8% | 12.4% | 17.7% | 19.8% | 17.0% | 12.6% | 16.5% | 19.5% | 0.0% | 22.2% |
| Alone | 7.9% | 8.5% | 5.0% | 7.7% | 7.6% | 8.5% | 5.0% | 6.9% | 2.1% | 7.7% | 0.0% | 22.4% |
| A mixed group of family and friends | 5.4% | 7.3% | 0.8% | 4.6% | 2.2% | 7.4% | 3.2% | 1.8% | 10.4% | 6.0% | 0.0% | 4.2% |
| A business meeting group | 1.1% | 0.3% | 0.0% | 2.3% | 1.7% | 1.0% | 1.1% | 3.4% | 0.3% | 0.6% | 0.0% | 18.5% |
| Other | 2.5% | 2.2% | 1.0% | 1.5% | 7.9% | 3.4% | 1.2% | 4.2% | 1.4% | 2.2% | 0.0% | 3.4% |

OVERALL HB TRAVEL GROUPS AVERAGED 3.4 PERSONS

- Overall 92% were traveling with other people.
- Of all visitors, groups averaged 3.4 (3.6) persons.
- Not surprisingly, the largest groups were families with 5.1 persons, followed by Hotel guests which averaged 3.9 and Other Californians with 3.8 persons.
- 40% (n/a) of travel groups included someone under age 18, including 67% of family travelers.

Table 56 – Number in Travel Group

| % Travelling with others | Total | Residence | | | | Activity Type | | HB Lodging | | | Family Tvlr | Biz/Mtg |
|--------------------------------------|-------------|------------|-------------|------------|------------|----------------|-----------------|------------|---------------|------------|----------------|------------|
| | | So. CA | Other CA | U.S. | Int'l | Act. Sports | Lux. Leisure | Hot/Mot | Other Paid | Day Vis | | |
| Base: all visitors | 1511 | 622 | 111 | 587 | 191 | 360 | 459 | 382 | 150 | 775 | 444 | 113 |
| Total | 91.9% | 91.2% | 94.7% | 92.2% | 92.4% | 90.8% | 94.8% | 93.0% | 97.9% | 92.1% | 100.0% | 77.3% |
| Over the age of 18 | 89.1% | 86.1% | 93.2% | 91.3% | 92.4% | 85.3% | 92.5% | 91.5% | 97.9% | 88.8% | 98.1% | 76.9% |
| Under the age of 18 | 40.3% | 38.8% | 47.1% | 43.5% | 33.8% | 42.9% | 36.8% | 45.2% | 43.4% | 39.5% | 67.2% | 6.5% |
| Base: all visitors | 1511 | 622 | 111 | 587 | 191 | 360 | 459 | 382 | 150 | 775 | 444 | 113 |
| Total (avg.) persons in group | 3.4 | 3.4 | 3.8 | 3.3 | 3.3 | 3.3 | 3.3 | 3.9 | 3.3 | 3.3 | 5.1 | 2.8 |
| Over the age of 18 | 2.8 | 2.8 | 3.2 | 2.7 | 2.8 | 2.7 | 2.7 | 3.2 | 2.7 | 2.7 | 3.6 | 2.7 |
| Under the age of 18 | 2.2 | 2.3 | 2.0 | 2.2 | 2.1 | 2.2 | 2.1 | 2.1 | 2.4 | 2.2 | 2.4 | 2.0 |

HALF OF VISITORS ARE MARRIED

- Just over half or 53% (63%) of Huntington Beach visitors are married/ domestic partner households while 32% (35%) are single/unmarried.
- As compared to the Total and other segments, a much higher share 74% (64%) of Other paid lodging guests, 65% (n/a) of family travelers, 62% (75%) of Hotel guests and 61% (n/a) of Luxury Leisure visitors said they are married.

Table 57 – Visitor Household Composition

| | Total | Residence | | | | Activity Type | | HB Lodging | | | Family Tvlr | Biz/Mtg |
|------------------------------------|-------------|------------|-------------|------------|------------|----------------|-----------------|------------|---------------|------------|----------------|------------|
| | | So. CA | Other CA | U.S. | Int'l | Act. Sports | Lux. Leisure | Hot/Mot | Other Paid | Day Vis | | |
| Base: | 1511 | 622 | 111 | 587 | 191 | 360 | 459 | 382 | 150 | 775 | 444 | 113 |
| Married/domestic partner | 53.0% | 49.1% | 56.4% | 59.3% | 49.4% | 45.9% | 60.5% | 61.7% | 74.4% | 51.1% | 65.4% | 59.6% |
| Single/unmarried adult | 31.6% | 36.4% | 28.6% | 27.8% | 24.0% | 33.2% | 26.4% | 22.3% | 19.7% | 33.3% | 18.6% | 30.8% |
| Extended generational family group | 5.1% | 3.3% | 4.3% | 5.8% | 11.0% | 7.0% | 6.3% | 10.3% | 2.0% | 3.9% | 8.3% | 7.4% |
| Group of unrelated individuals | 2.1% | 2.4% | 1.8% | 1.5% | 2.7% | 1.4% | 0.6% | 1.2% | 1.1% | 2.3% | 1.1% | 0.1% |
| Other | 5.6% | 7.1% | 4.9% | 2.3% | 9.0% | 10.1% | 5.1% | 1.9% | 1.5% | 6.7% | 5.0% | 0.0% |
| Prefer not to state/refused | 2.7% | 1.7% | 4.0% | 3.3% | 3.9% | 2.4% | 1.1% | 2.6% | 1.3% | 2.7% | 1.6% | 2.1% |

RESPONDENTS AVERAGED 36.8 YEARS OF AGE

- Visitor respondent overall median (midpoint) age was 36.8 in both 2018 and 2011.
- Other paid lodging guests' median age at 56 (42) were the oldest segment, with Other Californians next at 41 (37) and Hotel guests at age 40 (43).
- The youngest were active sports visitors at age 34 (n/a) and International visitors at 34.4 (43).

Table 58 – Age Group of Respondent

| | Total | Residence | | | | Activity Type | | HB Lodging | | | Family Tvlr | Biz/Mtg |
|---------------------------|-------------|-------------|-------------|-------------|-------------|---------------|--------------|-------------|-------------|-------------|-------------|-------------|
| | | So. CA | Other CA | U.S. | Int'l | Act. Sports | Lux. Leisure | Hot/Mot | Other Paid | Day Vis | | |
| Base: reported age | 1476 | 609 | 108 | 571 | 188 | 351 | 451 | 371 | 144 | 758 | 427 | 111 |
| 18-29 | 33.2% | 35.6% | 30.8% | 29.3% | 35.5% | 40.4% | 34.8% | 25.7% | 23.9% | 34.8% | 25.8% | 22.1% |
| 30-39 | 23.0% | 22.7% | 14.1% | 22.9% | 29.9% | 20.5% | 23.1% | 20.9% | 5.1% | 23.5% | 28.0% | 29.6% |
| 40-49 | 17.2% | 16.4% | 26.7% | 16.9% | 15.9% | 22.4% | 18.1% | 24.4% | 4.6% | 16.2% | 20.6% | 19.2% |
| 50-59 | 13.2% | 12.8% | 15.3% | 14.3% | 10.6% | 9.8% | 15.2% | 16.7% | 24.5% | 12.6% | 11.6% | 22.0% |
| 60+ | 13.3% | 12.5% | 13.0% | 16.5% | 8.1% | 7.0% | 8.7% | 12.3% | 41.8% | 12.9% | 13.9% | 7.0% |
| Median age (yrs.): | 36.8 | 35.8 | 41.4 | 38.5 | 34.4 | 34.2 | 36.0 | 40.9 | 56.2 | 36.0 | 38.1 | 38.9 |

VISITORS REPORT MODERATE MEDIAN INCOME

- Huntington Beach visitors reported 2018 median household income of \$85,000 a notable increase from \$69,300 in 2011.
 - Visitors' 2018 median household income is well above the \$57,700 for the U.S. as a whole and California's median income of \$67,200 (for 2017 based on 2013-2017 U.S. Census Community Survey).
- At the high end were Hotel guests with median income of \$98,300 (\$92,200), Family travelers at \$94,100 (n/a), Other U.S. visitors at \$91,700 (\$89,800) and Business travelers at \$90,300 (\$124,100), showing increases except Business travelers.
- At the lower end were Southern Californians at \$80,600 (\$60,400) and those in Other paid lodging at \$80,600 (\$88,200).

Table 59 – Annual Household Income 2011

| | Total | Residence | | | | Activity Type | | HB Lodging | | | Family Tvlr | Biz/Mtg |
|------------------------------|-----------------|-----------------|-----------------|-----------------|-----------------|-----------------|-----------------|-----------------|-----------------|-----------------|-----------------|-----------------|
| | | So. CA | Other CA | U.S. | Int'l | Act. Sports | Lux. Leisure | Hot/Mot | Other Paid | Day Vis | | |
| Base: reported income | 1185 | 510 | 88 | 454 | 133 | 294 | 359 | 298 | 113 | 604 | 330 | 94 |
| Under \$30,000 | 17.4% | 18.0% | 22.5% | 13.1% | 23.8% | 22.8% | 18.4% | 9.9% | 23.0% | 18.7% | 14.7% | 6.6% |
| \$30,000-\$49,000 | 12.6% | 15.3% | 6.1% | 11.4% | 7.4% | 9.5% | 10.6% | 9.7% | 7.2% | 13.3% | 8.8% | 10.1% |
| \$50,000 - \$74,999 | 12.8% | 13.1% | 15.2% | 12.4% | 11.0% | 11.1% | 11.7% | 11.6% | 15.5% | 12.9% | 10.9% | 13.6% |
| \$75,000 - \$99,999 | 18.2% | 16.6% | 12.2% | 19.5% | 26.5% | 21.4% | 16.1% | 20.2% | 18.8% | 17.6% | 20.4% | 32.1% |
| \$100,000 - \$249,999 | 31.9% | 30.6% | 30.5% | 36.2% | 25.8% | 27.8% | 35.1% | 37.1% | 32.8% | 31.0% | 37.2% | 29.2% |
| \$250,000 - \$500,000 | 5.2% | 3.5% | 12.7% | 6.4% | 4.3% | 3.5% | 5.0% | 10.0% | 2.2% | 4.3% | 7.0% | 5.1% |
| Over \$500,000 | 2.0% | 3.0% | 0.8% | 0.9% | 1.2% | 4.0% | 3.1% | 1.5% | 0.4% | 2.2% | 1.0% | 3.4% |
| Median income (USD): | \$84,969 | \$80,553 | \$87,651 | \$91,711 | \$82,372 | \$82,835 | \$89,456 | \$98,342 | \$80,647 | \$82,309 | \$94,118 | \$90,345 |

MORE THAN HALF OF RESPONDENTS ARE FEMALE

- The survey breakout was 57% (58%) female and 43% (42%) male very comparable both years (note: this represents respondents not necessarily total visitor composition).
- Even more or 61% of Luxury Leisure, 59% of Other U.S. , 59% of Family traveler and 58% of Southern Californian respondents are female.

Table 60 – Respondent Gender

| | Total | Residence | | | | Activity Type | | HB Lodging | | | Family Tvlr | Biz/Mtg |
|--------|-------|------------|----------|-------|-------|---------------|--------------|------------|------------|---------|-------------|---------|
| | | California | | U.S. | Int'l | Act. Sports | Lux. Leisure | Hot/Mot | Other Paid | Day Vis | | |
| | | So. CA | Other CA | | | | | | | | | |
| Base: | 1511 | 622 | 111 | 587 | 191 | 360 | 459 | 382 | 150 | 775 | 444 | 113 |
| Female | 57.2% | 58.2% | 49.5% | 59.4% | 51.7% | 53.1% | 60.5% | 54.0% | 49.1% | 58.3% | 59.3% | 56.3% |
| Male | 42.8% | 41.8% | 50.5% | 40.6% | 48.3% | 46.9% | 39.5% | 46.0% | 50.9% | 41.7% | 40.7% | 43.7% |

Appendix

- **Methodology**
- **Definition of a Visitor**
- **Interview Locations**
- **How to Read the Data Tables**

STUDY METHODOLOGY

- *Intercept Interviews:* A total of 1,511 visitor groups (375 average in Winter, Spring, Summer, Fall) were interviewed in Huntington Beach by a professional interviewer, using a hand held computer to record visitor responses, which formed the basis for the Visitor Profile and related findings.
 - This sample size is sufficient to be representative of Huntington Beach visitors, and the responses are accurate within a $\pm 2.5\%$ range (at the 95% confidence level).
- *Lodging Demand Analysis:* Huntington Beach hotel market performance was analyzed using data supplied by Visit Huntington Beach STR data. Citywide occupancy, room demand and rate were calculated quarterly and annually.
- *Resident Survey:* 649 Huntington Beach residents were surveyed on-site quarterly concurrently with visitors to determine their incidence of hosting visitors at home or referring guests to area, and residents' local activities.
- *Economic Impact Model and Estimates:*
 - Visitor data results were input into an economic model designed and utilized by CIC Research Inc. to generate estimates of visitor volume, visitor days and direct visitor spending in total and by lodging segment, and fiscal impacts and employment supported.
 - An additional analysis was completed by Tourism Economics to estimate extended induced and indirect economic and fiscal impacts and employment.

DEFINITION OF HUNTINGTON BEACH VISITOR

- A visitor is defined as someone “visiting Huntington Beach for the day or overnight, who resides outside the geographic boundaries of Orange County.”
 - Visitors can be in Huntington Beach for pleasure, vacation, business, to attend a meeting or special event, or for any reason other than to attend school or for employment.
 - This report uses the terms "visitor" and "tourist" interchangeably.
- “Hotel” encompasses paid transient hotel, motel and inn lodging types. “Other” paid lodging includes transient condos, corporate apartments and vacation homes (paid), and RV campgrounds (paid) and Private (unpaid) encompass residences of friends/family.

INTERVIEW LOCATIONS

Visitor interviews were conducted in the locations shown (in total and by season).

- Respondent interviews were fairly well distributed among locations including Downtown, Huntington Beach, the Pier, the beaches and Pacific City (not built in 2011).
- Another difference in 2018 from 2011 was interviewing in three of the city's hotels to capture guests who may not engage in tourist activities (i.e., business travelers and conference attendees).

**Table – Interview Locations
By Season**

| | Visitor | | | | |
|--|-------------|------------|------------|------------|------------|
| | Total | Winter | Spring | Summer | Fall |
| Base: | 1511 | 381 | 383 | 363 | 384 |
| Downtown (Main Street) | 19.0% | 16.0% | 15.4% | 25.6% | 19.3% |
| City Beach/HB Dog Beach | 18.3% | 26.5% | 22.2% | 15.4% | 8.9% |
| Pier | 16.9% | 20.2% | 20.4% | 19.3% | 7.8% |
| Pacific City | 12.1% | 9.2% | 9.9% | 11.8% | 17.4% |
| Wetlands/Bolsa Chica State Beach Reserve | 9.9% | 6.0% | 11.0% | 7.4% | 15.1% |
| Marriott SpringHill Suites | 8.8% | 0.8% | 3.1% | 7.7% | 23.4% |
| Downtown (non-Main Street) | 5.0% | 7.6% | 3.1% | 5.8% | 3.6% |
| Central Park | 4.3% | 6.0% | 3.9% | 5.2% | 2.1% |
| Waterfront Resort | 2.6% | 3.9% | 5.7% | 0.0% | 0.5% |
| Hyatt Regency Hotel | 1.5% | 1.6% | 2.6% | 1.4% | 0.5% |
| Huntington State Beach | 1.1% | 0.0% | 2.6% | 0.3% | 1.3% |
| Bella Terra Retail center | 0.5% | 2.1% | 0.0% | 0.0% | 0.0% |

HOW TO READ THE DATA TABLES

The column headings across the top of each table represent visitor subgroups as follows:

| | Total | Residence | | | | Activity Type | | HB Lodging | | | Family Tvlr | Biz/Mtg |
|-------|-------|-----------|-------------|------|-------|----------------|-----------------|------------|---------------|---------|----------------|---------|
| | | So. CA | Other CA | U.S. | Int'l | Act. Sports | Lux. Leisure | Hot/Mot | Other Paid | Day Vis | | |
| Base: | 1511 | 622 | 111 | 587 | 191 | 360 | 459 | 382 | 150 | 775 | 444 | 113 |

- Total: signifies all respondents/visitors
- Residence
 - So CA: visitors to Huntington Beach who reside in Southern California
 - Other CA: visitors to Huntington Beach who reside outside Southern California
 - U.S.: visitors to Huntington Beach who reside in the U.S., *excluding* California
 - Int'l: visitors to Huntington Beach residing in countries outside the United States
- Activity Type
 - Active Sports: engaged in surf, kayak, paddling, boat, sail, skate, bike in Huntington Beach
 - Luxury Leisure: engaged in golf, spa, shopping in Huntington Beach
- HB Lodging
 - Hotel/Motel: visitors staying overnight in an Huntington Beach hotel, motel or inn
 - Other Paid: visitors staying in any other paid Huntington Beach lodging incl. vacation rental, RV park, condo/timeshare, etc.,
 - Day Visitor: visiting Huntington Beach for the day only (but may be staying overnight elsewhere on their trip)