Monthly Summary Report

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Monthly Summary Report

July 2026



VISIT HUNTINGTON BEACH
SURF CITY USA®

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Executive Summary

July 2026

VISIT HUNTINGTON BEACH
SURF CITY USA®

Highlights

Huntington Beach had a strong July overall, with occupancy up 11.6% YoY to 85.5% and ADR up 10.7% to $428.63, driving RevPAR up 23.6% to $366.63. Supply fell 11% YoY and demand dipped slightly (-1.6%), but revenue still grew 8.9% YoY to $25.9M on rate strength.

Hotels saw balanced growth, occupancy +3.9% YoY to a strong 90.4%, ADR +7.7% to $399.65, RevPAR +11.9% to $361.43, and revenue +11.9% to $21.5M. Short-term rentals saw sharp rate gains (ADR +41.3%, RevPAR +79.2%) but on much lower supply (-46.5%) and demand (-32.2%), leaving STR revenue down 4.1% YoY to $4.3M.

July was a great month for social, with audience up 11.7% YoY to 288.7K, mostly driven by Instagram (50.2%). Engagement really stood out, jumping 70.8% YoY to 242.0K, while impressions grew 33.4% YoY to 5.8M and the engagement rate ticked up to 4.2%.

The US lost a net of 23,000 jobs in July as seasonal hiring cooled. The leisure and hospitality sector shed 40,000 jobs as post-World Cup staffing wound down. Despite the job losses, a multi-year low in the labor force participation rate has kept the unemployment rate at 4.1%.

National hotel performance held its momentum in July, with demand up 2.8% YOY and rates up 5.7% YOY, which drove an 8.2% YOY jump in RevPAR. July marked the sixth consecutive month in which RevPAR grew more than 4.0% YOY, pushing the year-to-date gain to 5.4%.

Hotel Demand
53.9K
+3.9% YOY

Hotel ADR
$399.65
+7.7% YOY

Total Trips
607,465
+26.2% YOY

Checkpoint Volume
(LAX, LGB, SNA)
3.9M
-4.2% YOY

Facebook Audience
108,310
+14.1% YOY

Social Media Audience
288.7K
+11.7% YOY

Website Sessions
86.3K
-37.1% YOY

L&H Jobs
792.3K
+2.4% YOY

Sources: STR, Datafy, TSA, Facebook Insights, Sprout Social, Google Analytics, and Bureau of Labor Statistics

Lodging Summary

Huntington Beach, CA

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Aggregate Lodging Performance

Sources: STR & KeyData

	Occupancy	ADR	RevPAR
Jul 2026	85.5%	$428.63	$366.63
YOY % Change	+11.6% YOY	+10.7% YOY	+23.6% YOY
Calendar Year-to-Date	73.7%	$333.06	$245.63
YTD YOY % Change	+17.7% YOY	+5.8% YOY	+24.5% YOY

Hotel Performance

Source: STR

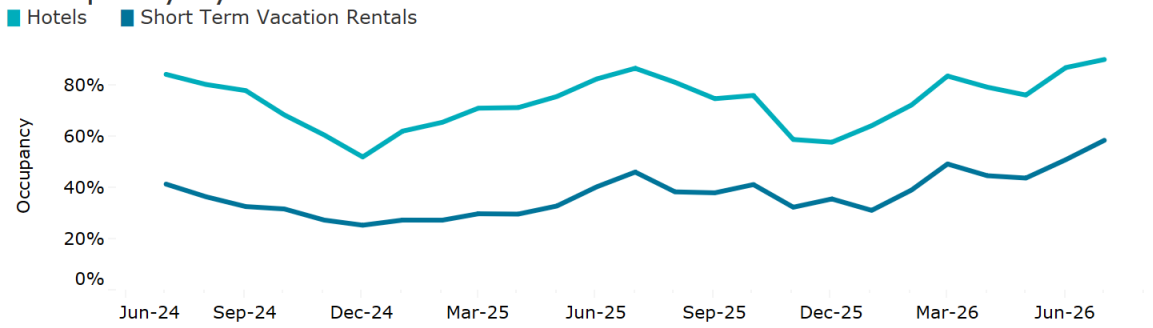
	Occupancy	ADR	RevPAR
Jul 2026	90.4%	$399.65	$361.43
YOY % Change	+3.9% YOY	+7.7% YOY	+11.9% YOY
Calendar Year-to-Date	79.3%	$311.72	$247.32
YTD YOY % Change	+7.3% YOY	+4.5% YOY	+12.1% YOY

Short Term Vacation Rental Performance

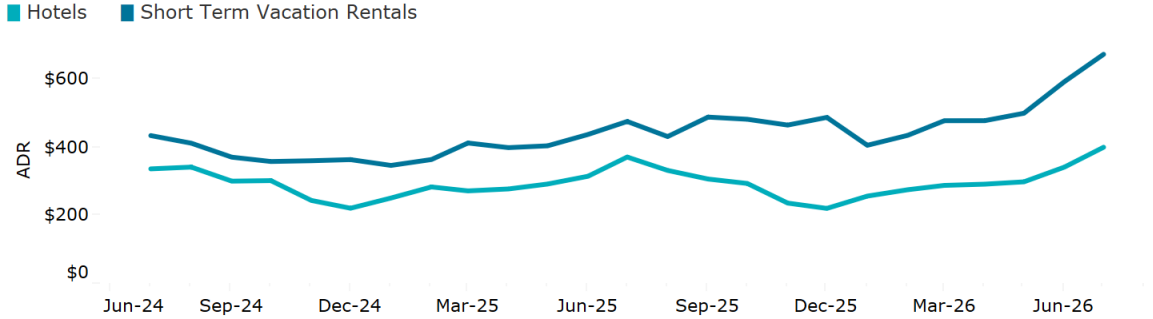
Source: KeyData

	Occupancy	ADR	RevPAR
Jul 2026	58.8%	$671.63	$394.94
YOY % Change	+26.8% YOY	+41.3% YOY	+79.2% YOY
Calendar Year-to-Date	45.5%	$520.86	$237.08
YTD YOY % Change	+37.2% YOY	+27.0% YOY	+74.2% YOY

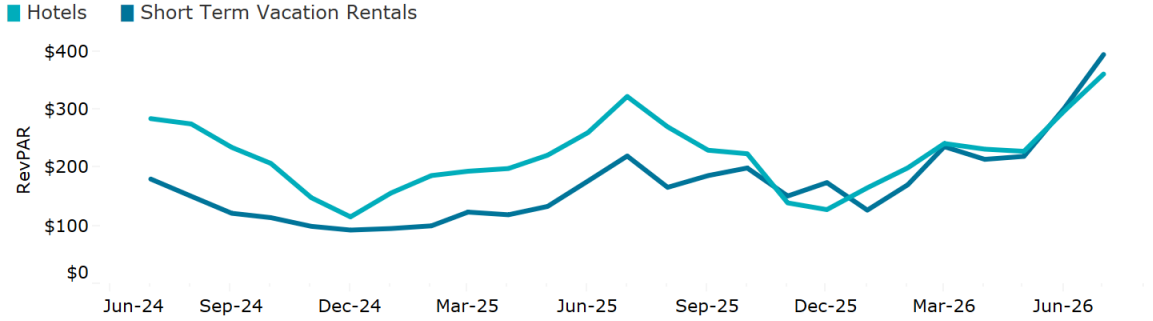
Occupancy by Month



ADR by Month



RevPAR by Month



Hotel Review

Huntington Beach, CA Performance

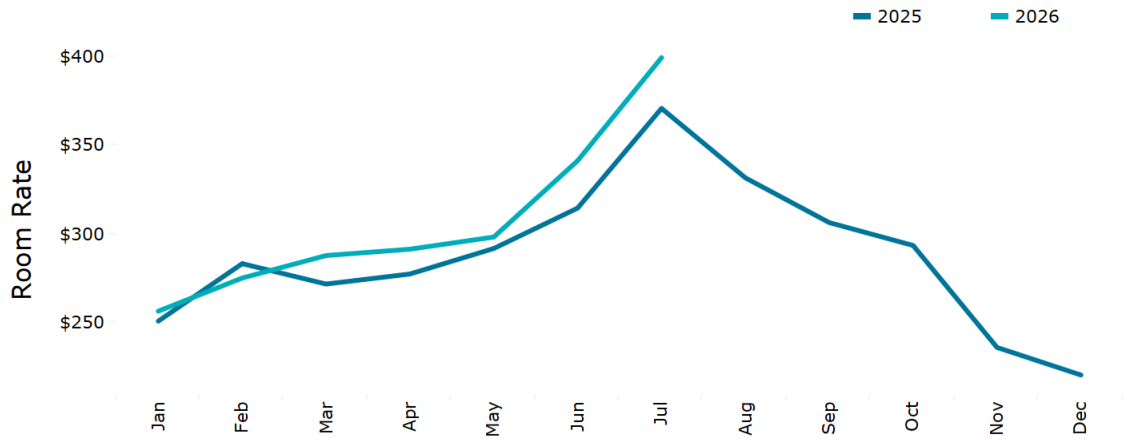
Calendar-Year-to-Date

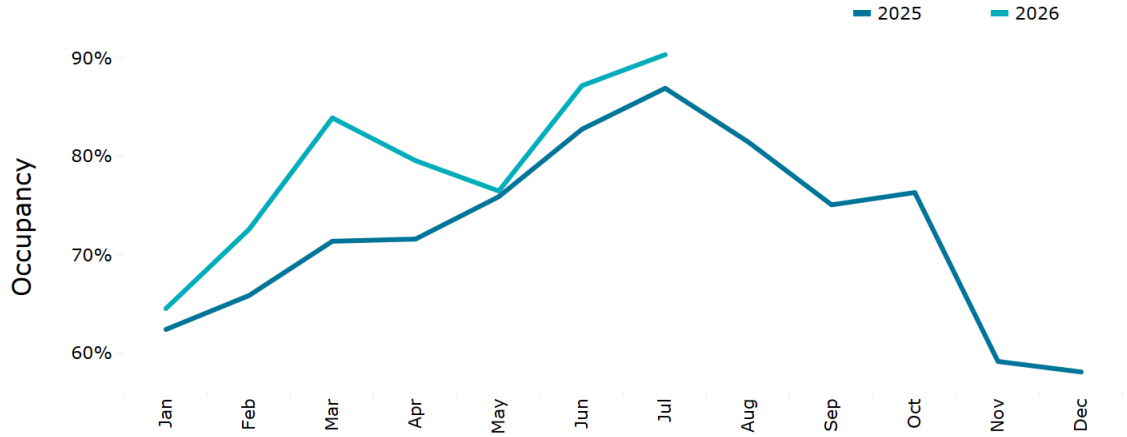
Occupancy	ADR	RevPAR	Supply	Demand	Revenue
79.3%	**$312**	**$247**	**407.5K**	**323.3K**	**$100.8M**
+7.3%	+4.5%	+12.1%	+0.0%	+7.3%	+12.1%

Latest 3 Months Performance

	OCC	% CHG	ADR	% CHG	RevPAR	% CHG
May	76.5%	+0.8%	$299	+2.2%	$228	+3.0%
Jun	87.3%	+5.4%	$342	+8.5%	$298	+14.3%
Jul	90.4%	+3.9%	$400	+7.7%	$361	+11.9%

Calendar Year-to-Date Trends





Source: STR

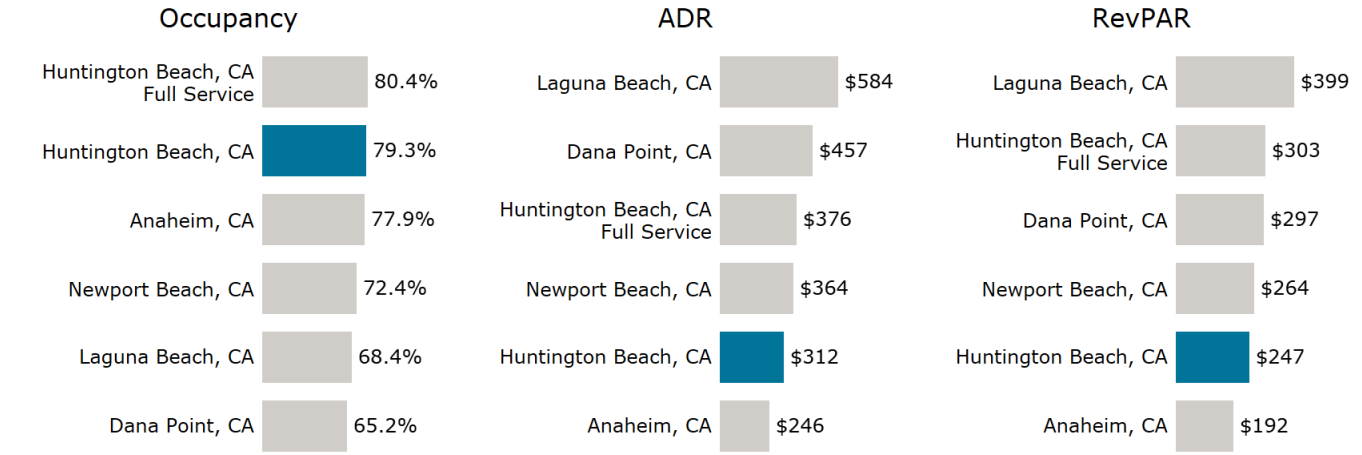
Hotel Competitive Performance

July 2026 Performance by Market

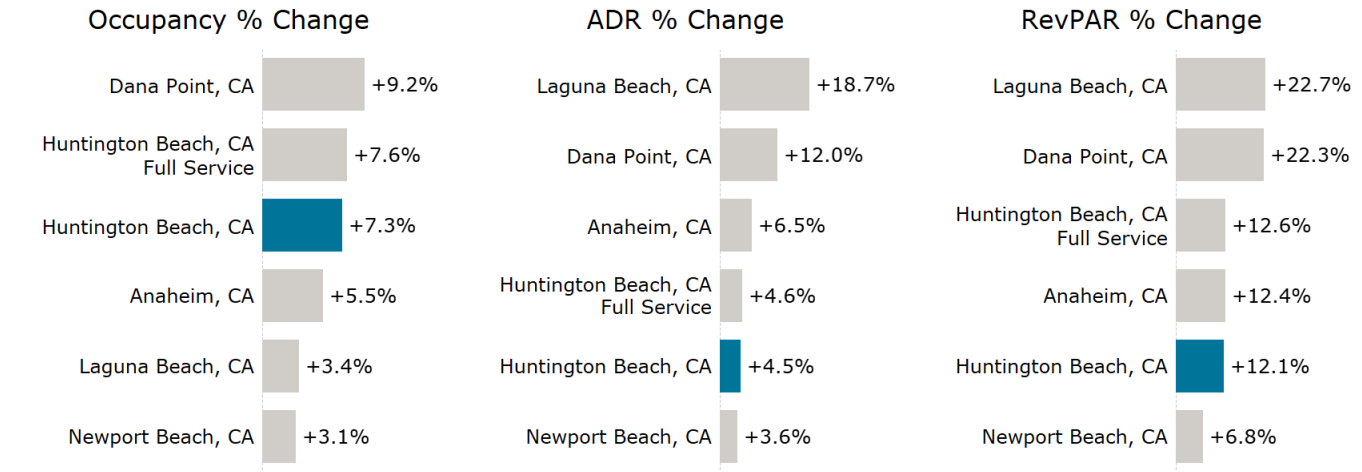
	OCC	% CHG	ADR	% CHG	RevPAR	% CHG
Anaheim, CA	84.2%	+3.7%	$248	+4.0%	$208	+7.9%
Carlsbad, CA	87.2%	+4.1%	$308	+5.8%	$269	+10.1%
Dana Point, CA	75.0%	-2.3%	$552	+10.5%	$414	+7.9%
Huntington Beach, CA	90.4%	+3.9%	$400	+7.7%	$361	+11.9%
Huntington Beach, CA Full Service	91.6%	+2.8%	$488	+9.0%	$447	+12.1%
Laguna Beach, CA	73.5%	-0.7%	$808	+19.5%	$594	+18.6%
Monterey, CA	86.8%	+3.3%	$287	+3.6%	$249	+7.0%
Newport Beach, CA	78.7%	-0.9%	$465	+9.0%	$366	+8.0%
Oceanside, CA	86.7%	+6.5%	$246	+6.9%	$213	+13.8%
Palm Springs, CA	51.2%	+4.2%	$142	+0.3%	$73	+4.5%
San Diego, CA	86.3%	+4.7%	$262	+5.1%	$226	+10.0%
San Francisco, CA	72.6%	+3.3%	$211	+3.7%	$153	+7.1%
San Luis Obispo, CA	84.5%	+3.6%	$213	+4.6%	$180	+8.4%
Santa Barbara, CA	85.0%	+5.9%	$344	+8.2%	$293	+14.6%
Santa Monica, CA	80.8%	+6.5%	$435	+16.5%	$352	+24.0%
Sonoma County, CA	72.5%	+5.2%	$229	-0.1%	$166	+5.1%
Temecula, CA	75.2%	+7.0%	$141	+4.3%	$106	+11.6%
West Hollywood, CA	73.3%	+6.3%	$348	+9.9%	$255	+16.9%

Calendar Year-to-Date Performance

Performance by Market



% Change vs. Previous Year



Source: STR

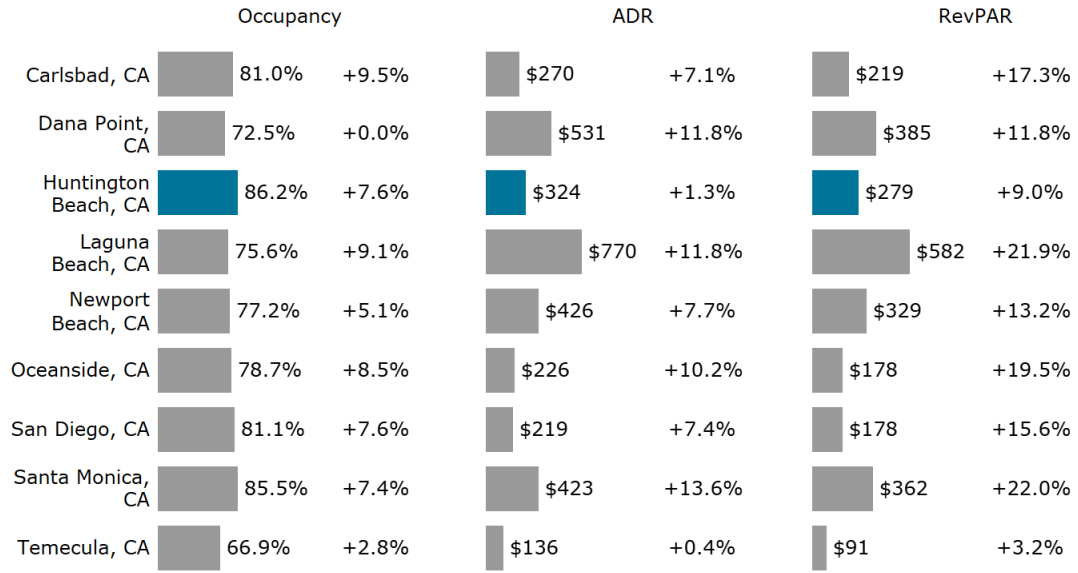
Hotel Outlook

Preliminary August 2026 Hotel Performance

Huntington Beach, CA

Occupancy	ADR	RevPAR
86.2%	**$324**	**$279**
+7.6%	+1.3%	+9.0%

Hotel Performance by Market



Preliminary August 2026 by Day-of-Week

Week Days

	OCC	% CHG	ADR	% CHG	RevPAR	% CHG
Carlsbad, CA	76.6%	+15.0%	$249	+10.2%	$191	+26.7%
Dana Point, CA	66.4%	+2.1%	$476	+13.0%	$316	+15.4%
Huntington Beach, CA	82.1%	+11.3%	$289	+1.9%	$238	+13.4%
Laguna Beach, CA	70.9%	+13.3%	$702	+12.3%	$498	+27.2%
Newport Beach, CA	74.1%	+7.0%	$415	+11.0%	$308	+18.8%
Oceanside, CA	73.5%	+11.8%	$202	+13.1%	$148	+26.5%
San Diego, CA	77.3%	+11.1%	$209	+8.8%	$162	+20.9%
Santa Monica, CA	84.6%	+11.0%	$411	+14.5%	$348	+27.2%
Temecula, CA	61.4%	+6.4%	$111	+0.0%	$68	+6.4%

Week Ends

	OCC	% CHG	ADR	% CHG	RevPAR	% CHG
Carlsbad, CA	91.3%	+4.9%	$308	+7.4%	$281	+12.6%
Dana Point, CA	86.7%	-2.0%	$631	+13.3%	$547	+11.0%
Huntington Beach, CA	95.7%	+3.9%	$392	+3.9%	$375	+7.9%
Laguna Beach, CA	86.4%	+3.6%	$898	+16.6%	$776	+20.7%
Newport Beach, CA	84.2%	+5.8%	$447	+4.1%	$376	+10.2%
Oceanside, CA	91.0%	+5.9%	$269	+9.9%	$245	+16.4%
San Diego, CA	90.0%	+3.3%	$237	+6.2%	$214	+9.8%
Santa Monica, CA	87.4%	+2.2%	$449	+14.2%	$392	+16.7%
Temecula, CA	79.6%	-1.7%	$182	+3.2%	$145	+1.4%

Note: Includes daily data through 8/29/2026
Source: STR

Short Term Rental Review

Monthly Performance by Market

		OCC	% CHG	ADR	% CHG	RevPAR	% CHG
May	Huntington Beach (All)	44.0%	+33.1%	$499	+23.6%	$220	+64.5%
	Orange	46.7%	+20.9%	$466	+16.1%	$218	+40.3%
	Sunset Beach	36.1%	+7.1%	$657	+3.9%	$237	+11.2%
Jun	Huntington Beach (All)	51.2%	+26.2%	$592	+35.3%	$303	+70.8%
	Orange	53.4%	+16.1%	$586	+23.6%	$313	+43.6%
	Sunset Beach	47.8%	+4.6%	$803	+8.8%	$384	+13.8%
Jul	Huntington Beach (All)	58.8%	+26.8%	$672	+41.3%	$395	+79.2%
	Orange	59.8%	+18.5%	$634	+23.1%	$379	+45.8%
	Sunset Beach	51.2%	+8.0%	$849	+6.2%	$435	+14.6%

Note: Occupancy is not reflective of overall changes in short term rental demand
Source: KeyData

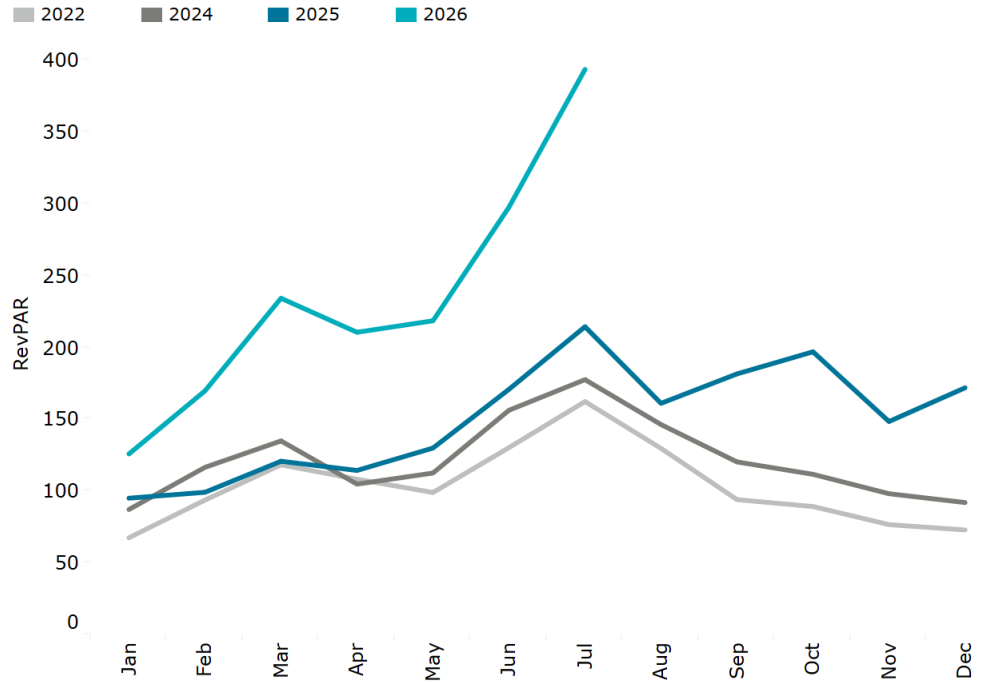
Calendar Year-to-Date Performance

Huntington Beach & Huntington Beach (All)

Occupancy	ADR	RevPAR
46.0%	**$509**	**$234**
+38.9%	+27.6%	+77.2%

Short Term Rental RevPAR by Month

Last Three Calendar Years



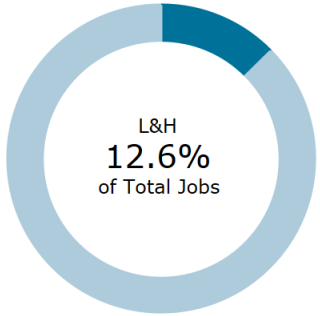
Leisure & Hospitality Workforce

Los Angeles-Long Beach-Anaheim, CA

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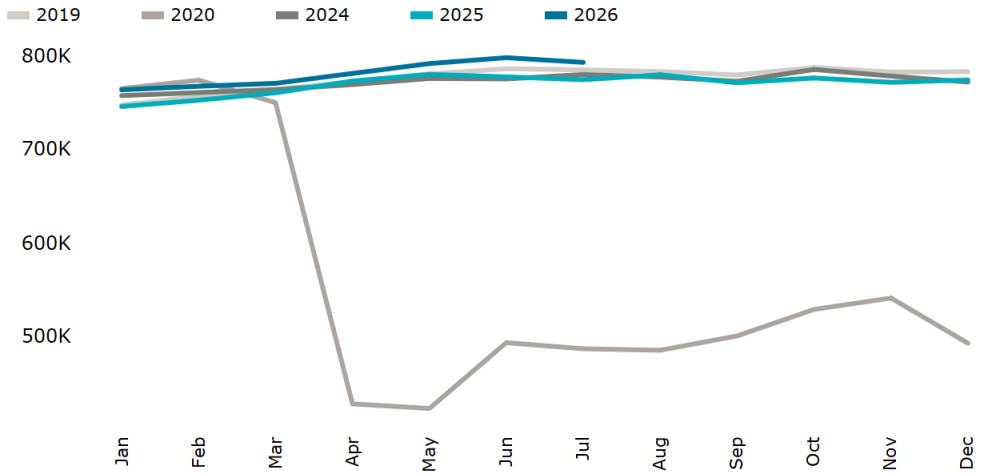
Total Leisure & Hospitality Jobs

L&H Jobs
as of July 2026
792.3K
+2.4% YOY | +1.0% vs. 2019



Employment Recovery

Leisure & Hospitality Jobs (Thousands)

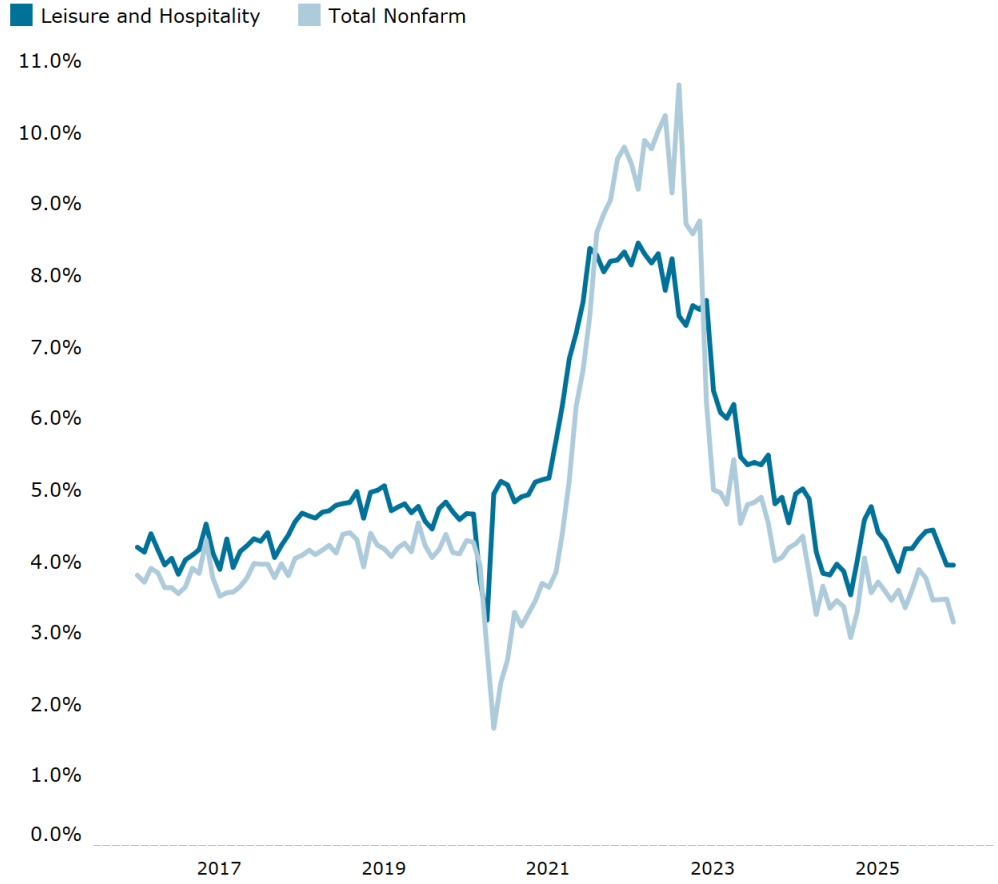


Source: Bureau of Labor Statistics

Leisure & Hospitality Job Openings

Job Opening Rate

Share of total available jobs that are not filled



Source: Tourism Economics

Airport TSA Checkpoint Volume & Visitor Origins

LAX - Los Angeles International, LGB - Long Beach (Daugherty Field), SNA - John Wayne/Orange County

Monthly TSA Checkpoint Volume

July 2026 Volume

3.9M

-4.2% YOY

Year-to-Date TSA Checkpoint Volume & Visitor Origins

Jan - Jul 2026 Volume

24.3M

-2.4% YOY

Source: Transportation Security Administration

TSA Checkpoint Volume by Month

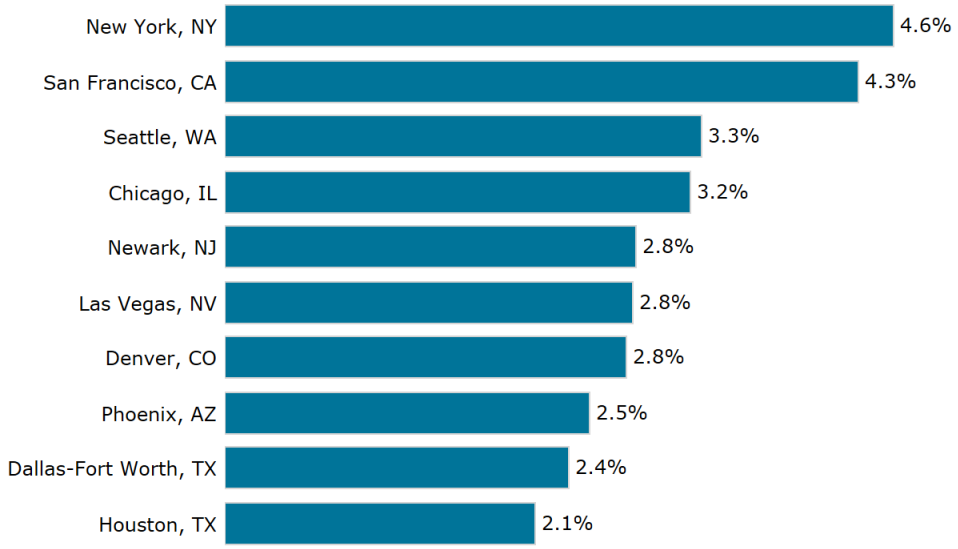
Last 6 months vs same period last year YOY %

Airport	Feb-26	Mar-26	Apr-26	May-26	Jun-26	Jul-26
LAX - Los Angeles International	2.4M 0.1%	2.9M -0.6%	2.8M -4.1%	2.9M -5.0%	3.2M -3.7%	3.2M -4.0%
LGB - Long Beach (Daugherty Field)	133.1K -1.0%	150.0K -10.7%	147.1K -7.3%	152.1K -8.0%	151.1K -11.8%	153.1K -11.6%
SNA - John Wayne/Orange County	431.0K 7.3%	503.2K 5.4%	481.3K 3.6%	491.1K -1.3%	518.9K -0.9%	523.3K -2.9%
Total	2.9M 1.1%	3.5M -0.2%	3.4M -3.2%	3.6M -4.6%	3.9M -3.7%	3.9M -4.2%

Source: Transportation Security Administration

Top Origin Markets - Air

Jan - Jul 2026 Visitor Arrivals



Source: OAG

Visitor Profile

Cluster: All

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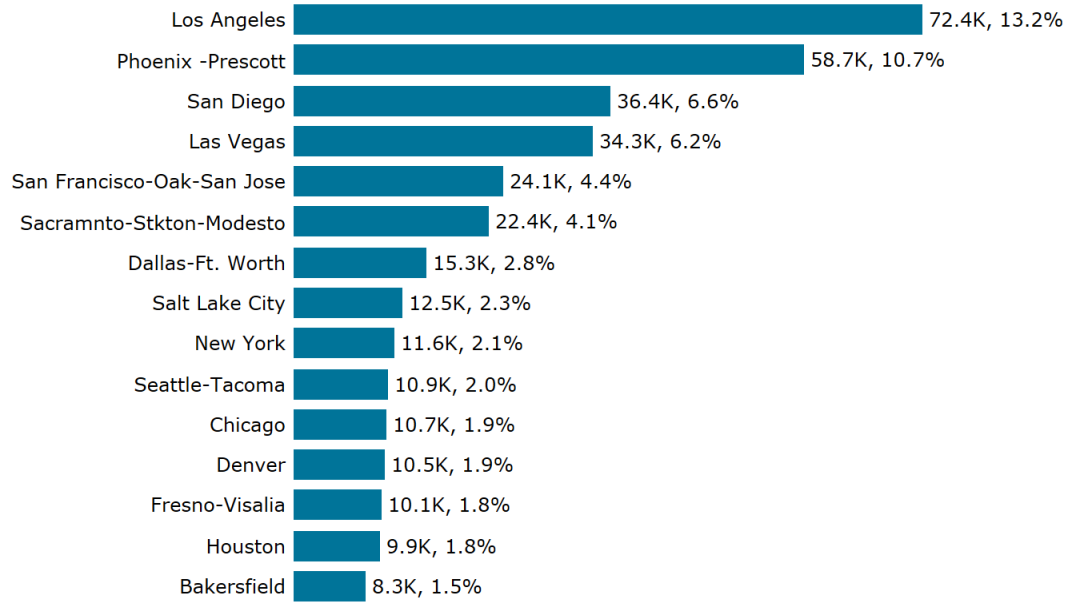
July 2026 Visitor Summary

Total Trips
607,465
+26.2% YOY

Average Trip Duration
2.9 days
-17.9% YOY

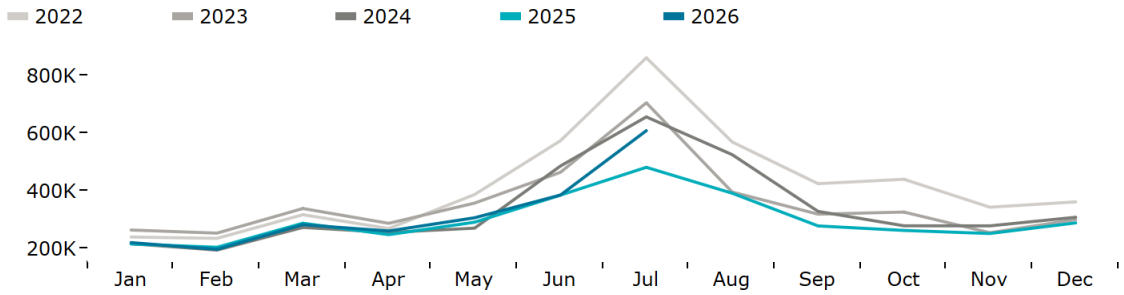
Top Origin MSAs

Total Trips; % Share of Total



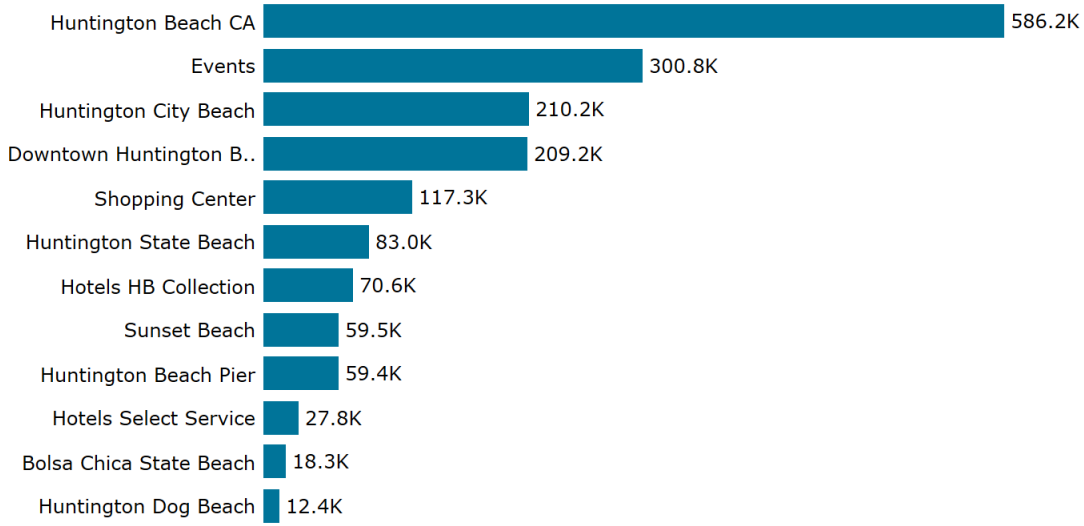
Visitor Trends & Characteristics

Total Visitors by Month



Top Clusters

July 2026 Trips

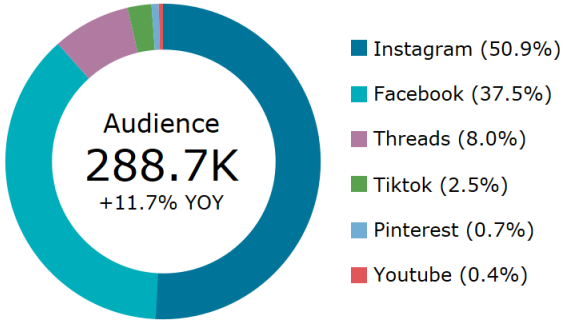


Source: Datafy

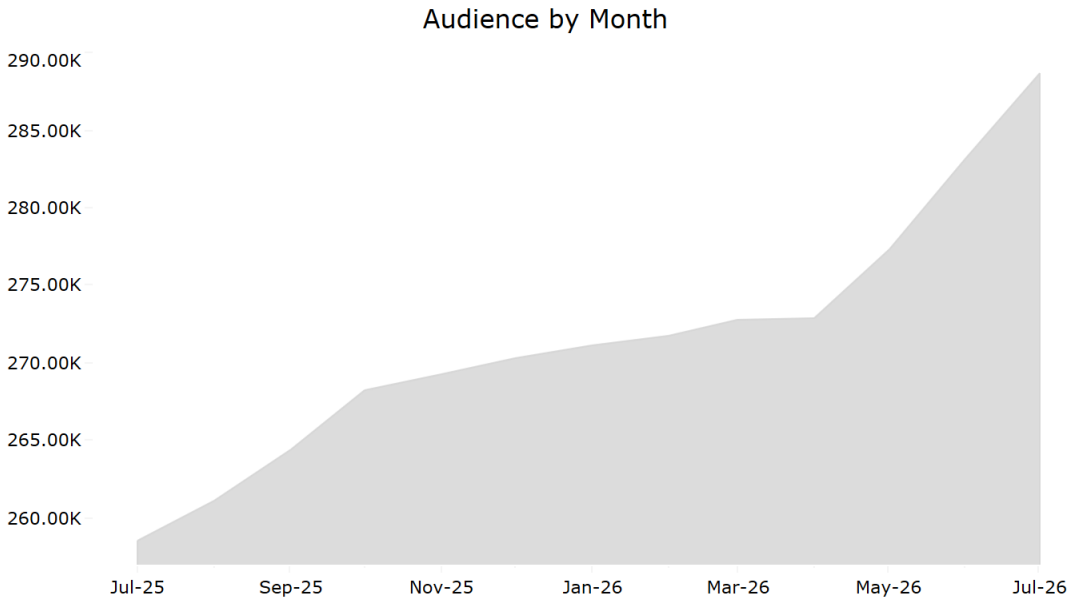
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Social Media Summary

Audience Overview



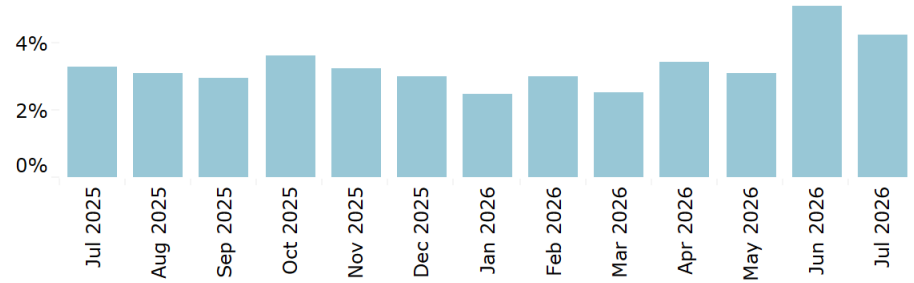
- Instagram (50.9%)
- Facebook (37.5%)
- Threads (8.0%)
- Tiktok (2.5%)
- Pinterest (0.7%)
- Youtube (0.4%)



Engagements & Impressions

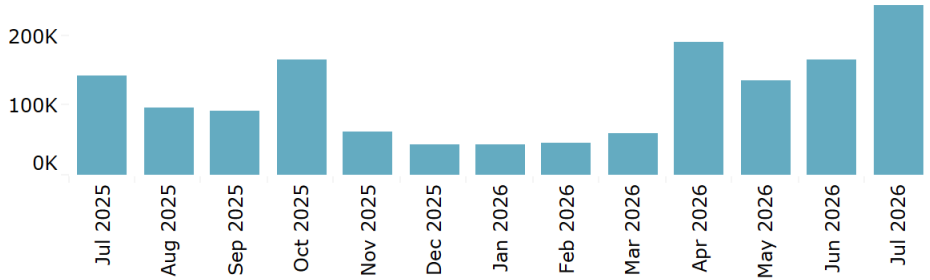
Engagement Rate

July 2026
4.2%
+0.9% pt YOY



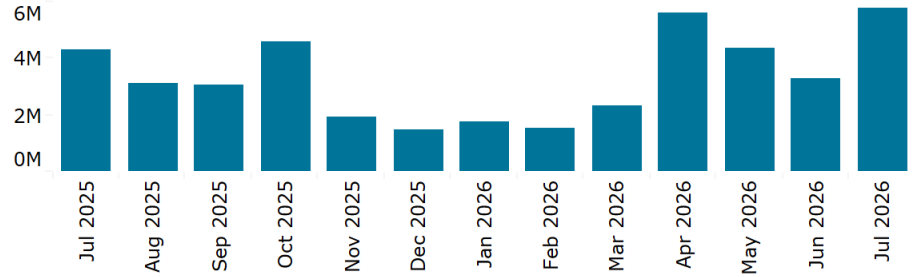
Engagements

July 2026
242.0K
+70.8% YOY



Impressions

July 2026
5.8M
+33.4% YOY



Source: Sprout Social

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Social Media Performance by Platform

July 2026

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Facebook

Audience
108.4K
+13.9% YOY

Engagement Rate	**3.6%**
Impressions	**2,009,582**
Video Views	**797,655**
Engagements	**72,923**
Comments	1,486
Reactions	38,316
Shares	3,518
Post Link Clicks	13
Post Clicks	29,590

Instagram

Audience
146.8K
+11.7% YOY

Engagement Rate	**4.6%**
Impressions	**3,147,137**
Video Views	**1,650,084**
Engagements	**144,881**
Comments	1,327
Reactions	101,372
Saves	8,414
Shares	19,345

LinkedIn

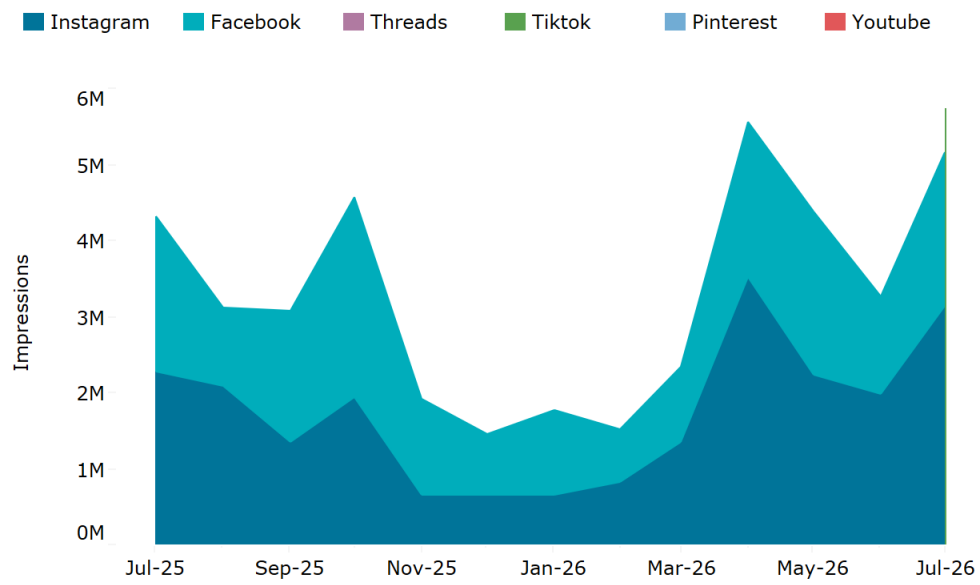
Audience

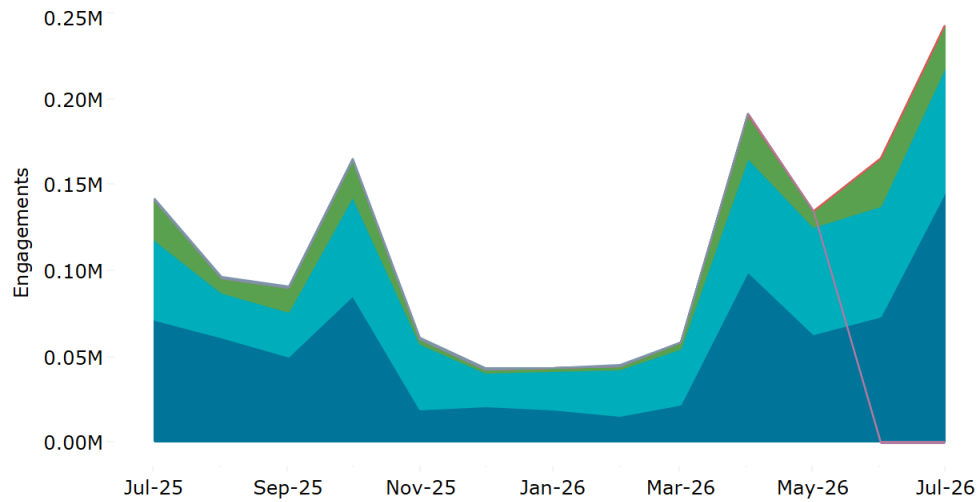
Engagement Rate	
Impressions	
Video Views	**0**
Engagements	
Comments	
Reactions	
Shares	
Post Link Clicks	

Tiktok

Audience
7.1K
+161.5% YOY

Engagement Rate	**4.1%**
Video Views	**599,273**
Engagements	**24,485**
Comments	524
Reactions	22,584
Shares	1,377





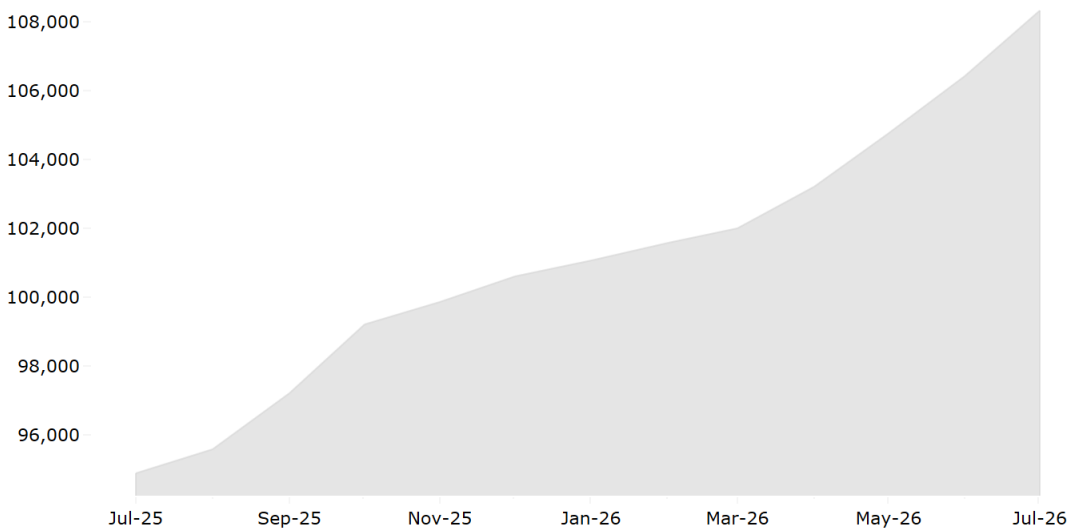
Source: Sprout Social

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Meta Facebook Insights

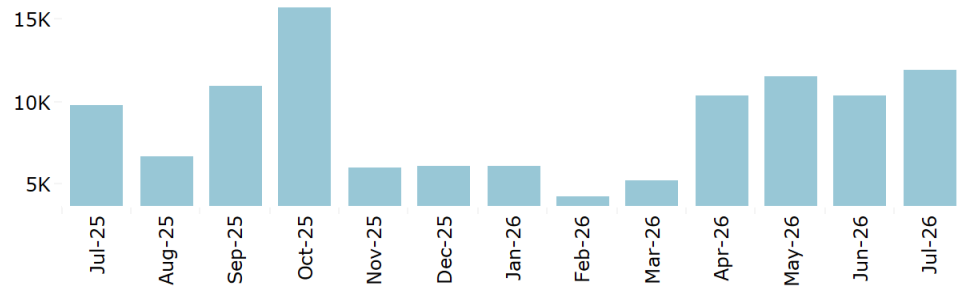
Audience Overview

Audience
July 2026
108,310
+14.1% YOY

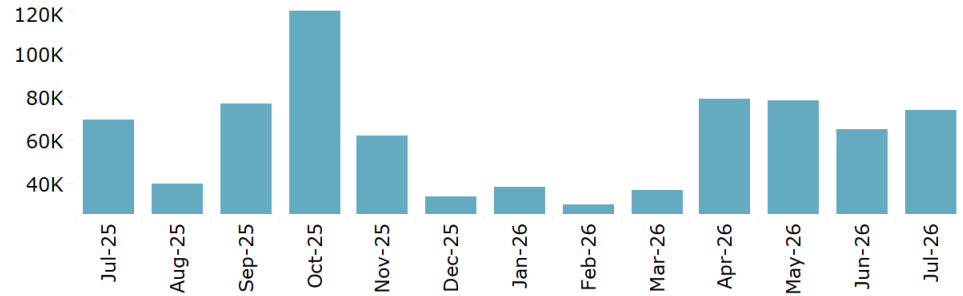


Engagements & Impressions

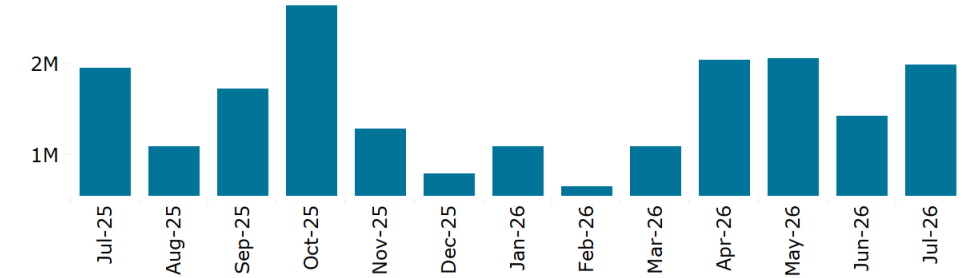
Page Views
July 2026
11,920
+21.6% YOY



Engagements
July 2026
74,295
+6.6% YOY



Impressions
July 2026
1,971,063
+1.6% YOY

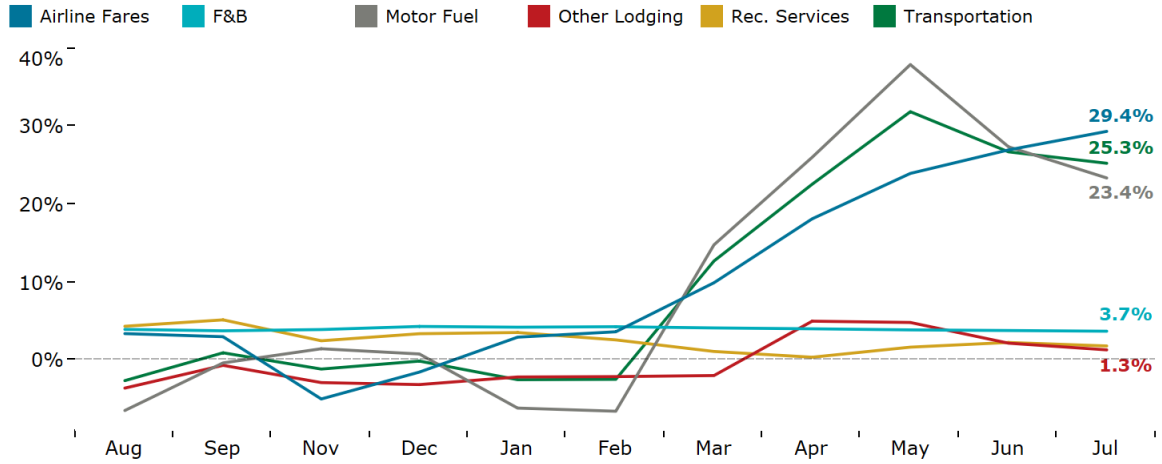


Source: Meta

Travel Trends

Travel Price Index

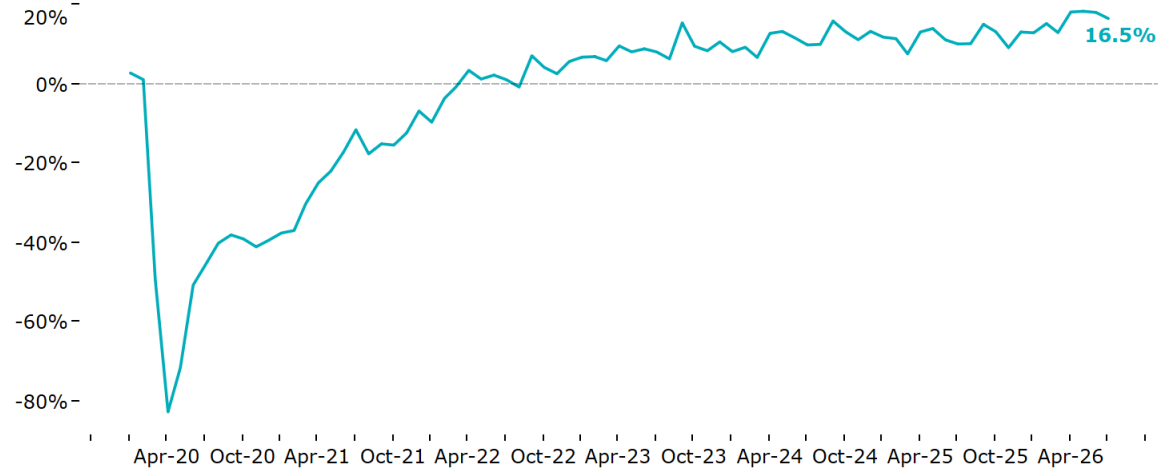
% Change Relative to Same Month in Previous Year | Last 12 Months



Source: U.S. Travel Association via U.S. Travel Recovery Tracker

Travel Spending (% change vs 2019)

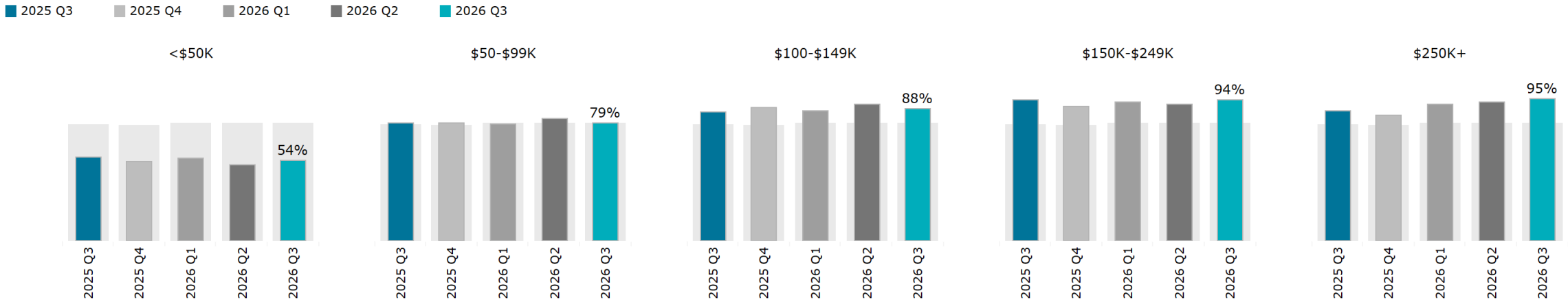
% Change vs. 2019 | U.S. total



Source: Tourism Economics via U.S. Travel Recovery Tracker

Planning Leisure Travel Within the Next 12 Months

% of American Consumers Planning Travel by Household Income (Calendar Year)



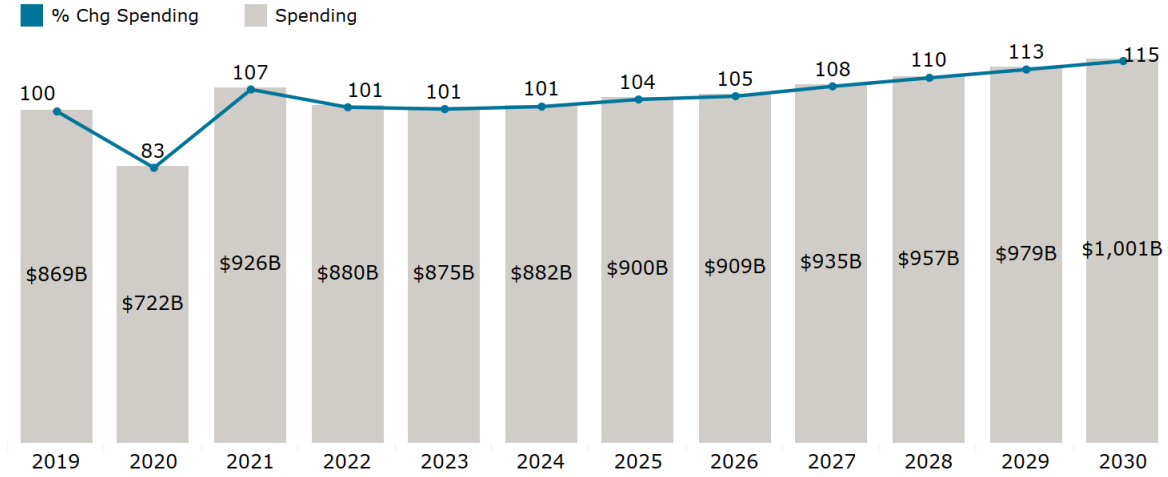
Note: Light gray bars represent the average for all survey respondants
Source: MMGY Global's Portait of American Travelers

Domestic Travel Forecast

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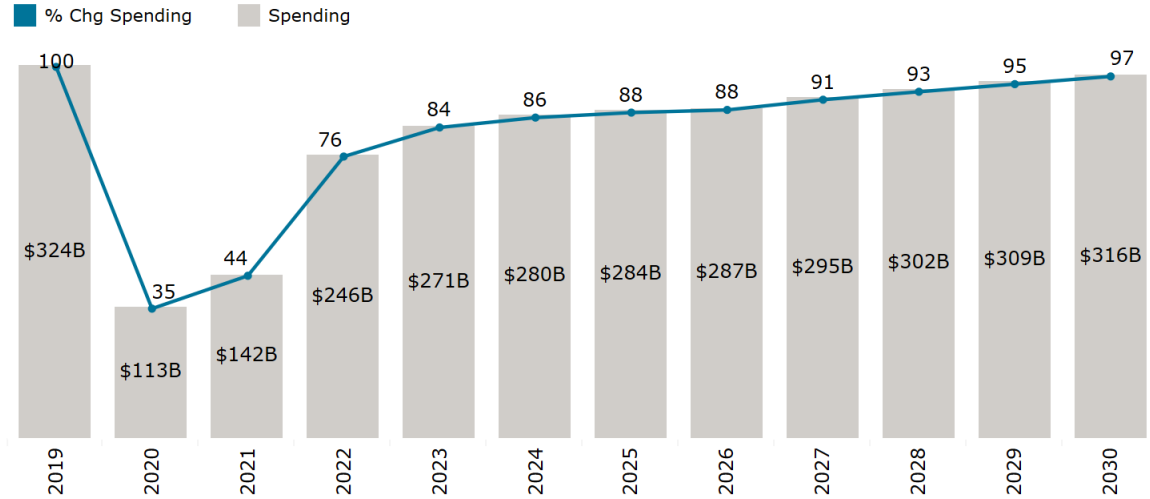
Real Domestic Leisure Travel Spending

Forecasted recovery, relative to 2019 (index, 2019=100)



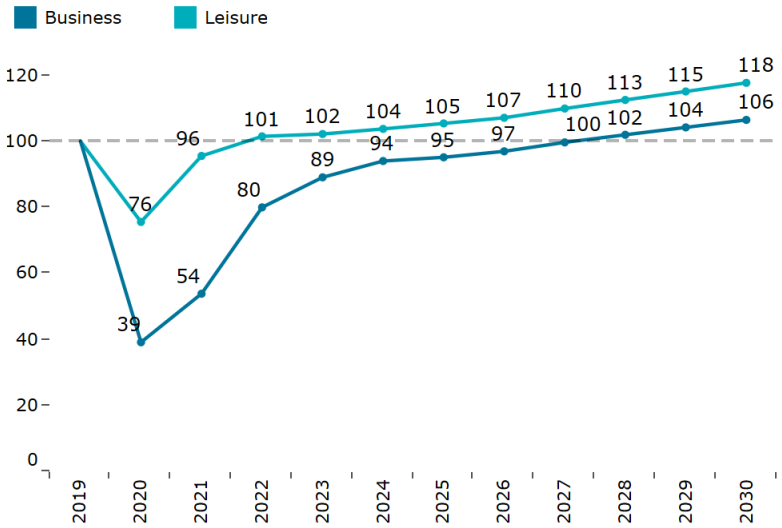
Real Domestic Business Travel Spending

Forecasted recovery, relative to 2019 (index, 2019=100)



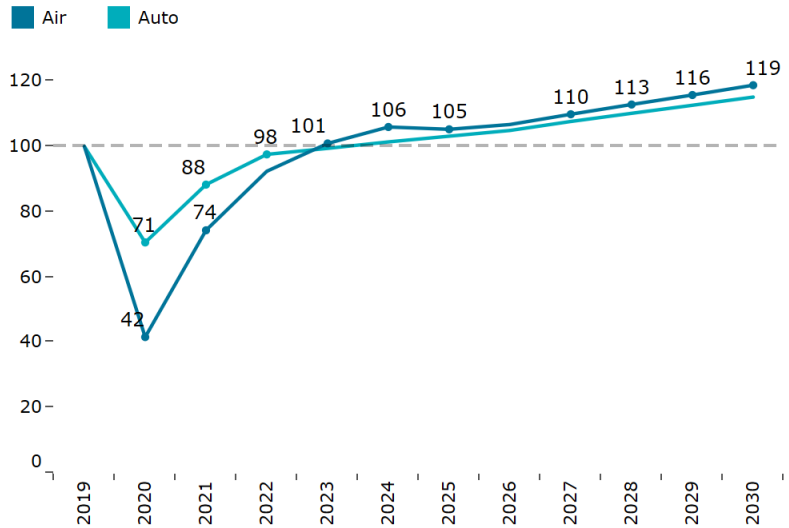
Leisure vs. Business Travel Volume

Forecasted recovery, relative to 2019 (index, 2019=100)



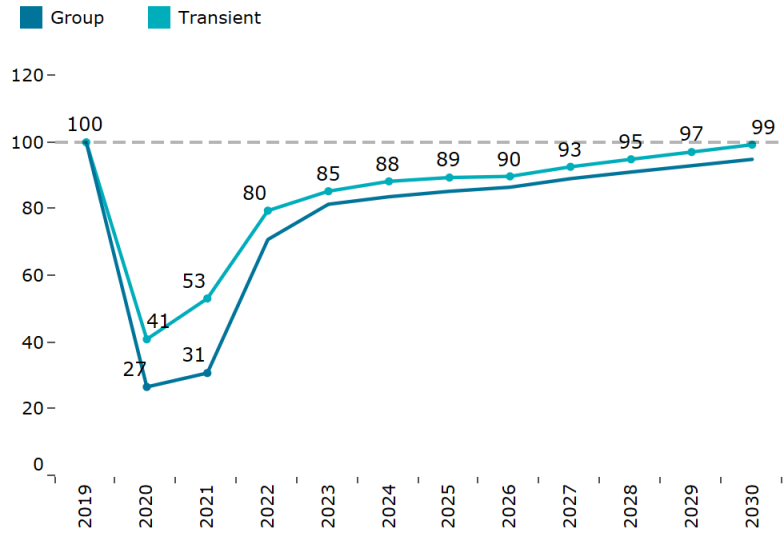
Auto vs. Air Travel Volume

Forecasted recovery, relative to 2019 (index, 2019=100)



Group vs. Transient Travel Spending

Forecasted recovery, relative to 2019 (index, 2019=100)



Forecast as of May 2026
Source: Tourism Economics via U.S. Travel Recovery Tracker

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