

# 85% WALKED TO GET AROUND BEVERLY HILLS

- A strong 85% (versus 63%) of visitors mainly walked to get around the city.
- Another 18% (versus 39%) used a rental car, 12% took a local tour bus/van, and only 10% (versus 25%) used a personal vehicle.
  - Tour bus was most popular among International visitors, although most of them walked as well.

**Table 27 – Mode to Get Around Beverly Hills**

	Total	Residence			Lodging			Total Tour
		Cal	Other US	All Int'l.	Day	Hotel	Home/Other	
<b>Base:</b>	<b>757</b>	<b>58</b>	<b>186</b>	<b>473</b>	<b>597</b>	<b>142</b>	<b>18</b>	<b>178</b>
Walking	84.6%	81.0%	84.5%	84.5%	84.8%	78.6%	88.9%	86.4%
Rental vehicle	17.5%	3.4%	23.1%	16.1%	16.8%	30.4%	16.7%	3.1%
Local/hop-on, hop off tour bus/van	12.1%	0.0%	11.4%	14.2%	12.3%	10.9%	0.0%	42.3%
Personal/borrowed vehicle	10.0%	45.9%	8.6%	6.4%	9.7%	10.0%	44.4%	0.0%
Public bus	4.0%	2.6%	3.2%	4.7%	4.1%	1.7%	0.0%	2.0%
Taxi	3.0%	1.7%	1.1%	3.9%	2.2%	15.3%	16.7%	2.6%
Private Motor Coach/ tour bus	1.9%	1.2%	0.0%	2.9%	1.8%	3.9%	0.0%	6.5%
Hotel/airport shuttle or limousine	1.7%	1.7%	0.7%	2.1%	1.5%	5.3%	0.0%	0.0%
Other	1.2%	0.0%	1.4%	1.4%	1.3%	2.0%	0.0%	0.0%

# MOST ON A TOUR BUS USED STARLINE

- Those who used a local hop-on-off tour van or bus, specified the tour company.\*
- Most, 51%, named Starline, with 13% using LA Sightseeing, and 10% LA Star Tours.

**Table 28 – Local Tour Bus/Van Company Taken**

	Total
<b>Base: Used Local Tour Bus/Van</b>	<b>148</b>
Starline	51.2%
LA Sightseeing	13.4%
LA Star Tours	9.9%
TMZ	0.9%
Rastabus	0.5%
Other	21.2%
Don't recall	2.9%

\* This question is new in 2013-14.

# OVERNIGHT ON TRIP OVERALL

Nights away, overall and for Beverly Hills, is discussed below and on the next slide and charted on the chart following that.

- Nearly all, 98% (versus 96%) of Beverly Hills visitors spent at least one night away from home.
- Visitors stayed 12.1 (versus 7.9) average total nights on this trip.
  - Thus overall overnight incidence and trip length rose since 2007.
  - Expectedly, all\* International visitors who travel farthest, took the longest, trips, 15.8 (versus 11.0) average nights, nearly 5 nights longer than in 2007.
  - In comparison, Other U.S visitors were away 6.4 (6.7) average nights and Californians spent 3.1 (3.5) nights, slightly below nights away in 2007.
- Of note, Beverly Hills Day visitors' total trips averaged 12.2 (versus 7.8) nights while Beverly Hills Hotel guests spent 9.5 (versus 8.2) average nights. This is likely as more Day visitors were of International origin and took longer trips, although with fewer nights in each area.

\* refers to *all* visitors not only those who stayed overnight in a location or in Beverly Hills.

## FEWER STAYED OVERNIGHT IN BEVERLY HILLS, BUT MORE IN HOTELS

- Nearly 9 of 10 or 81% (versus 89%) of all Beverly Hills visitors stayed overnight in the *Los Angeles area*.
- These *overnight visitors* stayed 4.9 (versus 4.9) average nights in the Los Angeles area, of which:
  - International visitors spent 5.0 (5.9) nights; Other U.S. visitors spent 4.3 (versus 4.5) nights in the Los Angeles area.
  - Beverly Hills Day visitors spent 5.0 (versus 5.1) nights there.
- Just 6% (versus 7%) of all Beverly Hills visitors stayed overnight *in Beverly Hills*, thus 94% (93%) were Day visitors (in Beverly Hills).
  - All visitors spent an average of .25 (.24) days in Beverly Hills.
  - Overnight visitors spent an average of 4.2 (3.5) nights here.

# OVERNIGHT STAY INCIDENCE & NIGHTS AWAY FROM HOME

**Table 29 - Overnight Stays On Trip, in Los Angeles, and in Beverly Hills**

	Total	Residence			Lodging			Total Tour
		Cal	Other US	All Int'l.	Day	Hotel	Home/Other	
<b>Base:</b>	<b>757</b>	<b>58</b>	<b>186</b>	<b>473</b>	<b>597</b>	<b>142</b>	<b>18</b>	<b>178</b>
<b>Percent staying overnight</b>								
Total	97.7%	74.8%	100.0%	99.3%	97.5%	100.0%	100.0%	99.6%
<b>In Beverly Hills</b>	<b>5.9%</b>	<b>6.2%</b>	<b>6.5%</b>	<b>5.6%</b>	<b>0.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>2.9%</b>
In Los Angeles area (excluding BH)	88.1%	58.2%	86.9%	92.0%	92.0%	29.0%	8.3%	92.3%
In all other locations/destinations	62.4%	20.8%	40.1%	79.3%	63.5%	45.4%	41.7%	76.3%
<b>Nights Away by All Beverly Hills visitors in:</b>								
Total	12.05	3.11	6.43	15.84	12.23	9.46	7.47	13.81
<b>Beverly Hills</b>	<b>0.25</b>	<b>0.21</b>	<b>0.25</b>	<b>0.26</b>	<b>0.00</b>	<b>4.08</b>	<b>4.83</b>	<b>0.14</b>
Los Angeles area (excluding BH)	4.78	1.80	4.26	5.39	5.01	1.14	0.44	4.60
All other locations/destinations	7.02	1.10	1.92	10.20	7.22	4.25	2.19	9.07
<b>Nights Away by Overnight Beverly Hills visitors in:</b>	<b>160</b>	<b>11</b>	<b>49</b>	<b>90</b>	<b>359</b>	<b>40</b>	<b>18</b>	<b>18</b>
Total	12.33	4.15	6.43	15.96	12.54	9.46	7.47	13.87
<b>Beverly Hills</b>	<b>4.20</b>	<b>3.45</b>	<b>3.78</b>	<b>4.57</b>	*	<b>4.08</b>	<b>4.83</b>	<b>4.64</b>
Los Angeles area (excluding BH)	5.43	3.09	4.91	5.86	5.45	3.92	*	4.99
All other locations/destinations	11.25	5.28	4.80	12.85	11.36	9.35	*	11.89

# HOTEL IN BEVERLY HILLS

- Nearly all, 99% (versus 70%) of Beverly Hills *overnight* visitors stayed in a hotel, while 1% (versus 28%) stayed in Other private unpaid lodging (e.g., friends/family residence, corporate apartment, etc.).
  - Thus since 2007, overnight visitors shifted to hotels from Other lodging, again likely related to the higher International visitation less likely to know people here with whom to stay.
- Average length of stay in a Beverly Hills hotel was 4.1 (versus 3.5) nights.

**Table 30 - Lodging Type in BH**

	Total
<b>Base: Overnight in BH</b>	<b>142</b>
Hotel	98.6%
Other/home/corporate apartment/condo/ vacation rental (unpaid or paid)	1.4%

# HOTEL RESERVATIONS – MEANS AND ADVANCE RESERVATION PERIOD

- 27% (versus 3%) of hotel guests reserved their hotel room on a general travel website.
- Another 18% (versus 14%) had their company book it, while 14% (n/a) had a relative/friend reserve, and 14% (versus 24%) used the hotel’s website.
- Hotel guests reserved their Beverly Hills hotel room 5.2 (versus 5.7) (median) weeks in advance of their travel date.
- 10% (versus 2%) did not make an advance hotel reservation.

**Table 31 – How Reserved BH Hotel**

	Total	Residence	
		Other US	All Int'l.
<b>Base: Overnight in BH hotel</b>	<b>141</b>	<b>40</b>	<b>84</b>
On a travel Internet site like hotels.com, Travelocity etc.	27.1%	22.5%	29.6%
My company booked it	18.1%	28.1%	13.0%
Relative/friend did it	14.1%	11.2%	16.1%
On the hotel's Internet site	13.8%	20.2%	10.8%
Call to the hotel "800" reservation #	8.2%	10.1%	8.1%
Through a travel agent	7.3%	3.4%	10.3%
My/our tour arranger or operator	4.2%	0.0%	6.7%
On Love Beverly Hills.com	1.7%	2.2%	0.9%
Other	5.4%	2.2%	4.5%

**Table 32 – Advance Reservation Period**

	Total	Residence	
		Other US	All Int'l.
<b>Base: Overnight in BH hotel</b>	<b>141</b>	<b>40</b>	<b>84</b>
0 (Did not plan ahead/decided or reserved here)	9.9%	11.2%	6.3%
1 week	2.8%	0.0%	1.8%
2 weeks	3.4%	2.2%	4.5%
3-4 weeks	29.4%	39.3%	24.2%
5-8 weeks	27.1%	27.0%	30.5%
9-12 weeks	14.1%	12.4%	15.2%
More than 12 weeks	13.3%	7.9%	17.5%
<b>Median (weeks):</b>	<b>5.17</b>	<b>4.36</b>	<b>6.24</b>

# DAY VISITORS AVERAGE 3.2 HOURS IN BEVERLY HILLS

- Day-only visitors stayed in Beverly Hills for an average of 3.1 (versus 3.5) hours
- Californian Day visitors stayed slightly longer, about 3.3 (versus 4) hours compared to Other U.S. or International visitors
- Tour group users stays averaged 3.0 hours.

**Table 33 – Hours in Beverly Hills (Day Visitors)**

	Total	Residence			Total Tour
		Cal	Other US	All Int'l.	
<b>Valid Base: Day visitor to BH</b>	<b>576</b>	<b>44</b>	<b>135</b>	<b>368</b>	<b>157</b>
2 hours or less	43.7%	42.7%	51.1%	39.9%	52.3%
3-4 hours	36.6%	31.1%	30.3%	39.5%	24.9%
5-6 hours	16.2%	19.4%	13.6%	17.6%	18.1%
7-8 hours	3.1%	3.9%	4.5%	2.8%	4.6%
9-12 hours	0.4%	2.9%	0.5%	0.2%	0.0%
<b>Mean:</b>	<b>3.12</b>	<b>3.30</b>	<b>3.07</b>	<b>3.22</b>	<b>2.96</b>

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# Visitor Spending

# VISITOR SPENDING INCIDENCE DROPS SINCE LAST STUDY

- 87% (versus 99%) of all Beverly Hills visitors spent money in Beverly Hills.
  - Incidence is highest among Californians at 92% (versus 100%), compared to 87% (versus 99%) for Other U.S. and 86% (versus 98%) among International visitors.
  - 100% (100%) of hotel guests spent versus 86% (99%) of Day visitors.
  - 75% of all tour bus users spent in Beverly Hills.
- By category, 64% (versus 82%) spent on meals out/snacks, 57% (versus 81%) spent on drinks/ beverages, and 54% (versus 69%) spent for shopping/gifts, by far the top three categories.
- Thus incidence is lower now than in 2007 for most spending categories.

**Table 34 - Spending Incidence (% who spent)**

Percent of visitors spending in a category	Total	Residence			Lodging			Total Tour
		Cal	Other US	All Int'l.	Day	Hotel	Home/Other	
<b>Base:</b>	<b>757</b>	<b>58</b>	<b>186</b>	<b>473</b>	<b>597</b>	<b>142</b>	<b>18</b>	<b>178</b>
<b>Total</b>	<b>86.7%</b>	<b>91.9%</b>	<b>87.1%</b>	<b>85.8%</b>	<b>86.1%</b>	<b>100.0%</b>	<b>77.8%</b>	<b>75.0%</b>
Meals out/snacks	64.2%	73.7%	66.9%	61.6%	62.6%	89.4%	72.2%	53.0%
Drinks/beverages	56.5%	57.2%	64.9%	54.3%	55.6%	73.2%	55.6%	51.5%
Shopping/Gifts/Souvenirs	54.4%	40.0%	56.8%	54.4%	53.4%	70.4%	55.6%	45.3%
Local Transportation	29.9%	18.1%	35.6%	29.4%	30.3%	25.4%	16.7%	17.2%
Admissions attraction/museum/theater/club	7.6%	10.0%	7.3%	8.0%	7.4%	12.0%	5.6%	9.0%
Lodging (per night)	5.3%	4.3%	6.3%	5.0%	0.0%	100.0%	0.0%	2.6%
Groceries/personal or other items	2.1%	0.9%	1.0%	2.8%	1.8%	4.9%	11.1%	2.1%
Spa, beauty, health services/ products	1.8%	5.9%	1.5%	1.4%	1.3%	8.5%	11.1%	0.0%

## DAILY SPENDING ROSE OVERALL & FOR MOST CATEGORIES

- All visitors spent a total daily average of \$236 (versus \$220) in Beverly Hills.
- By category, the 55% (versus 69%) of visitors who spent on shopping, by far the highest category, spent an daily per-capita average of \$138 (versus \$101).
- When aggregated to all visitors spending totaled \$989 (versus \$580) million, accounting for 59% (versus 46%) of their total spending.

**Table 35 – Overall Visitor Spending in Beverly Hills By Category**

Spending Category	Daily Per Capita	Total Annual	Percent of Total
Shopping/gifts	\$ 138.28	\$ 989,510,868	58.6%
Lodging	\$ 39.57	\$ 283,170,370	16.8%
Meals	\$ 30.64	\$ 219,226,951	13.0%
Beverages	\$ 10.59	\$ 75,774,913	4.5%
Attractions/museums/theaters/clubs	\$ 6.12	\$ 43,827,613	2.6%
Local Transportation	\$ 5.19	\$ 37,158,084	2.2%
Amenities/health/spa	\$ 4.77	\$ 34,160,281	2.0%
Groceries/incidentals/other	\$ 0.62	\$ 4,449,104	0.3%
<b>Total</b>	<b>\$ 235.79</b>	<b>\$ 1,687,278,183</b>	<b>100.0%</b>

# DAY VISITORS SPENT MOST IN TOTAL, HOTEL GUEST MOST PER CAPITA

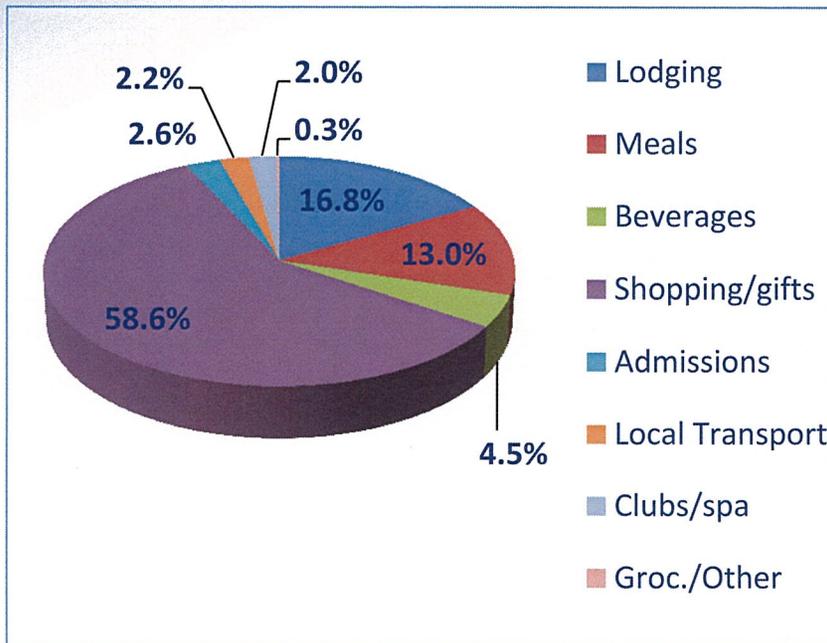
- **Day visitors** spent the most \$843 (versus \$669) million in total, due to their volume, with overall daily per-capita spending of \$149 (versus \$147).
  - Of their total, retail **spending** accounted for nearly three-quarters or 74% (versus 55%), at \$623 (versus \$369 ) million or \$110 (versus \$81) daily per-capita on retail.
- **Hotel Guests** spent \$771 (versus \$482 ) million in total, with \$632 (versus \$588) daily per-capita.
  - Of the total, \$319 (versus \$148) million, or 41% (versus 31%) was for retail, averaging \$262 (versus \$180) per capita.
  - They spent \$283 (versus \$211) million or \$232 (versus \$ 257) daily per-capita for paid lodging.
- The small **Other Lodging** segment spent \$72 (versus \$116 ) million in total, with per-capita daily spending of \$262 (versus \$287).
  - They spent \$48 (versus \$63) million or 66% (versus 54%) on retail.

**Table 36 – Spending by Category by Visitor Lodging Type**

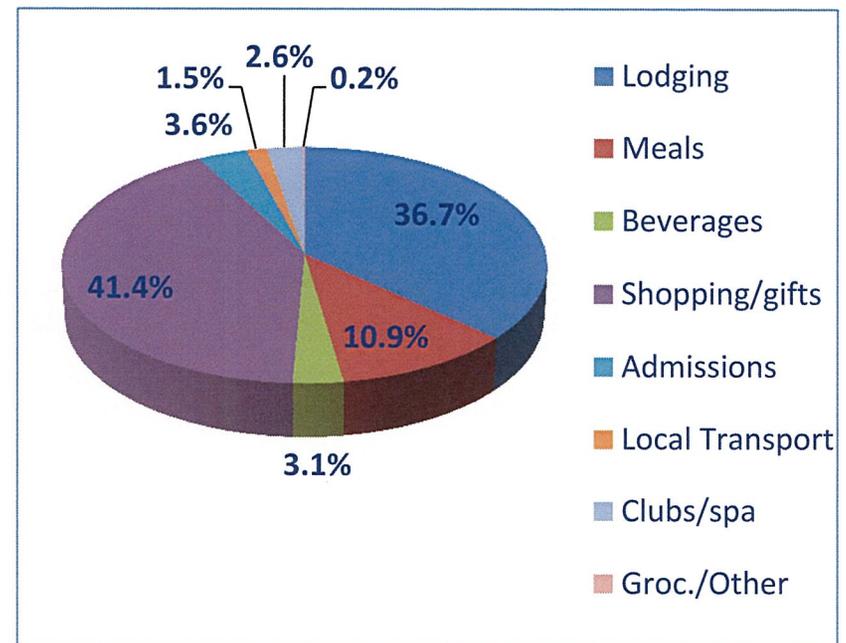
Spending Category	Hotel & Other Paid Lodging			Home/Other Lodging			Day Visitors		
	Daily Per Capita	Total Annual	Percent of Total	Daily Per Capita	Total Annual	Percent of Total	Daily Per Capita	Total Annual	Percent of Total
Shopping/gifts	\$ 261.72	\$ 319,310,332	41.4%	\$ 172.64	\$ 47,642,962	65.9%	\$ 110.00	\$622,557,574	73.8%
Lodging	\$ 232.10	\$ 283,170,370	36.7%	\$ -	\$ -	0.0%	\$ -	\$ -	0.0%
Meals	\$ 69.13	\$ 84,340,579	10.9%	\$ 51.95	\$ 14,337,296	19.8%	\$ 21.30	\$120,549,076	14.3%
Attractions/mus./theater/ club	\$ 22.96	\$ 28,013,870	3.6%	\$ 0.29	\$ 79,299	0.1%	\$ 2.78	\$ 15,734,444	1.9%
Beverages	\$ 19.51	\$ 23,808,148	3.1%	\$ 21.32	\$ 5,884,001	8.1%	\$ 8.14	\$ 46,082,764	5.5%
Amenities/Health/Spa	\$ 16.59	\$ 20,237,336	2.6%	\$ 6.03	\$ 1,665,283	2.3%	\$ 2.17	\$ 12,257,662	1.5%
LocalTransport/Parking	\$ 9.31	\$ 11,354,991	1.5%	\$ 5.91	\$ 1,630,392	2.3%	\$ 4.27	\$ 24,172,702	2.9%
Groc./Incidentals/Other	\$ 0.99	\$ 1,205,884	0.2%	\$ 4.02	\$ 1,110,189	1.5%	\$ 0.38	\$ 2,133,031	0.3%
<b>Total</b>	<b>\$ 632.30</b>	<b>\$ 771,441,509</b>	<b>100.0%</b>	<b>\$ 262.17</b>	<b>\$ 72,349,422</b>	<b>100.0%</b>	<b>\$ 149.03</b>	<b>\$843,487,252</b>	<b>100.0%</b>

# DAILY SPENDING SHARE – ALL VISITORS & HOTEL GUESTS

**Exhibit 2a - Spending Share – All Visitors**



**Exhibit 2b Spending Share – Hotel Guests**



# PER-VISITOR DAILY SPENDING BY SEGMENT

- By segment, mean daily spending in Beverly Hills was highest for Hotel guests at \$632, high income visitors at \$340, and \$250 spent by International visitors.
- At the lower end was the \$137 spent by tour takers and \$149 by Day visitors.
- For each segment, spending was highest by far for shopping items.

**Table 37 - Per-Capita Daily Spending by Visitor Segments**

Mean Daily spending per individual visitor	Total	Annual											
		Residence			Lodging			Tour Bus				Hshd. Income	
		Cal	Other US	All Int'l.	Day	Hotel	Home/Other	Total Tour	Motor Coach	Hop-on Off	Star-line	<\$100K	\$100K+
<b>Base:</b>	<b>757</b>	<b>58</b>	<b>186</b>	<b>473</b>	<b>597</b>	<b>142</b>	<b>18</b>	<b>178</b>	<b>32</b>	<b>148</b>	<b>73</b>	<b>364</b>	<b>261</b>
<b>Total</b>	<b>235.79</b>	<b>244.00</b>	<b>177.05</b>	<b>259.13</b>	<b>149.03</b>	<b>632.30</b>	<b>262.17</b>	<b>136.98</b>	<b>154.87</b>	<b>131.14</b>	<b>108.79</b>	<b>161.61</b>	<b>339.80</b>
Shopping/Gifts/Souvenirs	138.28	126.29	98.03	155.02	110.00	261.72	172.64	79.02	99.17	73.26	50.39	88.72	202.34
Lodging (per night)	39.57	25.91	28.38	46.03	0.00	232.10	0.00	17.03	21.61	15.42	13.47	26.37	61.50
Meals out/snacks	30.64	56.13	29.08	28.84	21.30	69.13	51.95	23.55	23.02	23.62	25.52	22.27	42.32
Drinks/beverages	10.59	16.07	9.93	10.03	8.14	19.51	21.32	7.55	4.53	8.29	6.69	7.68	15.17
Attraction/museums/theater/nightclub admissions	6.12	7.33	2.69	7.86	2.78	22.96	0.29	4.20	3.87	4.21	4.51	8.94	4.40
Transportation (gas, car rental, cab, limo, parking, etc)	5.19	4.37	3.85	5.88	4.27	9.31	5.91	5.23	2.36	5.91	7.69	3.84	6.92
Spa, beauty or health services and products	4.77	7.23	4.75	4.71	2.17	16.59	6.03	0.00	0.00	0.00	0.00	3.50	6.12
Groceries/personal/other items	0.62	0.69	0.33	0.77	0.38	0.99	4.02	0.41	0.30	0.43	0.52	0.30	1.02

# **Satisfaction, Recommendation and Characterization of Beverly Hills**

# HIGH SATISFACTION WITH BEVERLY HILLS AS A DESTINATION

- 89% (versus 89%) of visitors rated the Beverly Hills destination as extremely or very satisfying. Virtually no one was dissatisfied.
- The mean rating was 4.27 (versus 4.19) out of 5 points, that is, between “very” and “extremely” satisfied.
  - Other Lodging and Hotel guests rated it highest, at 4.53 (versus 4.05) and 4.47 (versus 4.27) respectively, both showing strong increases.

**Table 38 – Satisfaction Ratings for Beverly Hills Destination**

	Total	Residence			Lodging			Total Tour
		Cal	Other US	All Int'l.	Day	Hotel	Home/Other	
<b>Base:</b>	<b>757</b>	<b>58</b>	<b>186</b>	<b>473</b>	<b>597</b>	<b>142</b>	<b>18</b>	<b>178</b>
Extremely satisfied	41.2%	42.3%	39.5%	42.5%	40.5%	51.8%	58.3%	36.9%
Very satisfied	<u>47.5%</u>	<u>43.8%</u>	<u>47.8%</u>	<u>46.7%</u>	<u>47.8%</u>	<u>44.3%</u>	<u>36.1%</u>	<u>49.5%</u>
<b>Extr. + very</b>	<b>88.7%</b>	<b>86.1%</b>	<b>87.4%</b>	<b>89.2%</b>	<b>88.3%</b>	<b>96.1%</b>	<b>94.4%</b>	<b>86.5%</b>
Somewhat satisfied	6.8%	12.2%	4.5%	7.2%	7.1%	2.5%	5.6%	6.3%
Somewhat unsatisfied	1.2%	1.7%	2.5%	0.8%	1.2%	1.1%	0.0%	1.6%
Don't know	3.2%	0.0%	5.7%	2.8%	3.4%	0.3%	0.0%	5.7%
<b>Mean rating (5=Extr. sat., 1=Very unsat.):</b>	<b>4.27</b>	<b>4.27</b>	<b>4.22</b>	<b>4.30</b>	<b>4.26</b>	<b>4.47</b>	<b>4.53</b>	<b>4.19</b>

# SATISFIED WITH CLEANLINESS, SHOPS FRIENDLINESS, WEATHER &

- Main reasons for visitor satisfaction include; cleanliness, by 56% (versus 46%) the top reason both years, great shops, by 40% (versus 42%), second both years.
- Next were friendliness by 34% (versus 34%), and great weather by 31% (n/a), as well as many other reasons as listed below.

**Table 39 – Top\* Reasons Why Satisfied with Beverly Hills**

	Total	Residence			Lodging			Total Tour
		Cal	Other US	All Int'l.	Day	Hotel	Home/Other	
<b>Base: Satisfied with BH</b>	<b>674</b>	<b>53</b>	<b>168</b>	<b>417</b>	<b>523</b>	<b>134</b>	<b>17</b>	<b>154</b>
Clean	56.1%	38.6%	56.8%	57.2%	56.2%	53.9%	55.9%	56.9%
Great shops	39.8%	28.1%	40.1%	38.6%	39.9%	40.9%	26.5%	29.6%
Friendly	33.5%	25.1%	32.5%	35.9%	33.6%	31.3%	41.2%	36.7%
Great weather	31.3%	18.5%	38.9%	29.5%	30.8%	35.4%	47.1%	33.2%
Many things to see and do	24.5%	16.0%	20.2%	27.6%	24.7%	20.9%	23.5%	29.1%
Like the area/good nice area	23.1%	25.6%	21.9%	23.8%	22.7%	29.0%	32.4%	22.9%
High-end/luxury atmosphere and places	22.1%	24.6%	23.3%	20.4%	21.0%	38.8%	29.4%	13.9%
Great restaurants	21.0%	25.6%	23.1%	19.1%	20.0%	37.1%	29.4%	15.3%
Fun place to visit/fun things to do	19.0%	12.9%	18.9%	20.3%	18.8%	19.7%	38.2%	13.7%
Lovely village atmosphere	17.3%	24.7%	17.5%	17.3%	17.2%	18.0%	29.4%	13.9%
Easy to get around	15.3%	8.5%	11.9%	18.0%	14.9%	22.3%	8.8%	23.8%
Pedestrian friendly/pleasant walking areas	14.1%	7.0%	12.1%	13.7%	14.2%	10.7%	29.4%	14.7%
Safe place	12.8%	9.5%	10.9%	14.9%	12.5%	15.4%	32.4%	11.5%

\* by more than 10% each

# MOST VERY LIKELY TO RECOMMEND BEVERLY HILLS TO OTHERS

- 87% (versus 91% highly likely to “tell others” in 2007) would be “extremely” or “very” likely to recommend others to visit Beverly Hills.\*
- The average rating was 4.31 (versus 4.34) out of 5, between very and extremely likely.
- Hotel and Other Lodging guests rated their likeliness to recommend higher than other segments, but all rated it above 4.0.

**Table 40 – Likelihood to Recommend Beverly Hills to Others**

	Total	Residence			Lodging			Total Tour
		Cal	Other US	All Int'l.	Day	Hotel	Home/ Other	
<b>Base:</b>	<b>757</b>	<b>58</b>	<b>186</b>	<b>473</b>	<b>597</b>	<b>142</b>	<b>18</b>	<b>178</b>
Extremely likely	46.7%	38.5%	42.4%	48.5%	46.2%	54.9%	55.6%	43.5%
Very likely	39.9%	41.2%	42.7%	39.6%	40.2%	34.5%	36.1%	46.6%
Extr + Very	<b>86.6%</b>	<b>79.7%</b>	<b>85.1%</b>	<b>88.1%</b>	<b>86.4%</b>	<b>89.4%</b>	<b>91.7%</b>	<b>90.1%</b>
Somewhat likely	10.7%	17.3%	11.3%	9.3%	10.8%	8.1%	5.6%	8.3%
Somewhat unlikely	1.0%	2.6%	1.5%	0.7%	1.0%	2.2%	0.0%	0.4%
Very unlikely	0.1%	0.0%	0.0%	0.1%	0.1%	0.0%	0.0%	0.0%
DK	1.7%	0.4%	2.1%	1.8%	1.7%	0.3%	2.8%	1.2%
<b>Mean rating (5=Extr. likely, 1=Very unlikely):</b>	<b>4.31</b>	<b>4.15</b>	<b>4.25</b>	<b>4.35</b>	<b>4.31</b>	<b>4.42</b>	<b>4.46</b>	<b>4.33</b>

\* In 2007 question was, “how likely to tell others about the visit to Beverly Hills?”

## BEVERLY HILLS PERSONIFIED AS CLASSY, GLAMOROUS, LUXURIOUS & STYLISH

- *If Beverly Hills were a person, 40% (versus 45%) of visitors describe Beverly Hills as classy/high class, 27% (versus 25%) said glamorous, with 28% (versus 34%) saying luxurious, and 25% (versus 31%) saying stylish.*
- More Hotel guests, 48%, (versus 43%) described Beverly Hills as classy/high class.

# BEVERLY HILLS CHARACTER

**Table 4I – Beverly Hills Character if a Person**

	Total	Residence			Lodging			Total Tour
		Cal	Other US	All Int'l.	Day	Hotel	Home/Other	
<b>Base:</b>	<b>757</b>	<b>58</b>	<b>186</b>	<b>473</b>	<b>597</b>	<b>142</b>	<b>18</b>	<b>178</b>
Classy/high class	40.0%	27.6%	44.8%	39.8%	39.6%	47.9%	38.9%	40.6%
Glamorous	28.6%	30.4%	29.3%	28.6%	28.7%	30.9%	16.7%	33.9%
Luxurious	28.1%	30.3%	20.4%	29.5%	27.9%	30.9%	30.6%	20.4%
Stylish	25.1%	26.9%	19.5%	27.5%	25.6%	18.9%	13.9%	27.3%
Hip/trendy	13.5%	8.7%	17.7%	13.0%	13.6%	13.6%	8.3%	11.9%
Shopper	12.7%	15.1%	9.7%	14.1%	12.4%	18.9%	5.6%	14.6%
Exclusive	12.5%	10.8%	14.9%	12.1%	12.3%	14.8%	16.7%	12.1%
Tasteful	10.3%	9.5%	12.4%	9.4%	10.2%	11.4%	13.9%	14.7%
VIP	9.3%	3.9%	8.3%	10.3%	9.4%	7.5%	8.3%	9.3%
Timeless/classic	8.0%	6.0%	8.1%	7.8%	7.8%	10.9%	8.3%	8.7%
World-class	7.2%	3.0%	4.8%	9.0%	7.0%	10.6%	5.6%	6.9%
Smart/chic	7.1%	2.1%	6.6%	7.5%	7.1%	6.7%	8.3%	9.3%
Elitist	6.8%	16.1%	9.0%	5.3%	6.9%	3.9%	13.9%	6.5%
Relaxing/rejuvenating	5.9%	3.8%	7.8%	5.6%	5.7%	8.1%	16.7%	3.8%
Snobby	5.6%	0.9%	4.7%	6.8%	5.7%	5.6%	0.0%	6.0%
Formal	4.4%	0.8%	3.6%	5.1%	4.3%	5.8%	8.3%	5.3%
Special	4.4%	0.9%	5.0%	4.4%	4.3%	6.1%	5.6%	1.8%
Uncool	0.6%	0.0%	0.0%	0.9%	0.6%	0.0%	0.0%	1.0%
Dated/passé/old school	0.2%	0.4%	0.1%	0.2%	0.1%	0.0%	5.6%	0.0%
Other	18.8%	29.1%	17.1%	19.0%	19.1%	13.9%	13.9%	16.4%
None of these	1.3%	1.7%	0.2%	1.8%	1.4%	0.0%	5.6%	0.8%

# **Travel Group Characteristics & Demographics**

# OVER ONE-THIRD TRAVELED AS A FAMILY; FEWER ALONE

- More visitors, 36% (versus 25%) traveled as a family, with 24% (versus 15%) in groups of friends, and 23% (versus 29%) in couples.
- Only 6% (versus 24%) were traveling alone.
- Thus, 2013-14 shifted strongly to families and groups, away from solo travelers.

**Table 42 – Travel Group Composition**

	Total	Residence			Lodging			Total Tour
		Cal	Other US	All Int'l.	Day	Hotel	Home/ Other	
<b>Base:</b>	<b>757</b>	<b>58</b>	<b>186</b>	<b>473</b>	<b>597</b>	<b>142</b>	<b>18</b>	<b>178</b>
A family group	35.5%	33.4%	45.0%	30.5%	35.6%	36.5%	27.8%	32.3%
A group of friends or co-workers	24.0%	25.1%	20.2%	26.0%	24.2%	20.3%	27.8%	23.0%
A couple	23.0%	17.7%	17.0%	26.5%	22.9%	25.1%	22.2%	24.2%
A mixed group of family/friends	6.9%	7.0%	4.7%	7.8%	6.9%	7.5%	0.0%	8.9%
Alone	5.7%	12.5%	5.9%	4.9%	5.4%	8.4%	22.2%	1.6%
An organized tour group	3.7%	0.0%	6.0%	3.5%	3.9%	0.0%	0.0%	9.3%
Other	1.2%	4.3%	1.2%	0.7%	1.1%	2.2%	0.0%	0.6%

# LARGER GROUP SIZE TO NEARLY 3 PERSONS

- This shift to families and away from solo travelers is reflected in the group size, at 2.7 now versus 1.7 in 2007.
  - Those on tours had the largest travel group at 3.0 persons
  
- This year 18% (versus 22%) traveled with someone under age 18.

**Table 43 – Travel Group Size**

	Total	Residence			Lodging			Total Tour
		Cal	Other US	All Int'l.	Day	Hotel	Home/ Other	
<b>Base:</b>	<b>757</b>	<b>58</b>	<b>186</b>	<b>473</b>	<b>597</b>	<b>142</b>	<b>18</b>	<b>178</b>
Adult travel group	82.2%	81.8%	75.9%	85.0%	82.2%	80.3%	88.9%	80.7%
Traveling with children under 18	17.8%	18.2%	24.1%	15.0%	17.8%	19.7%	11.1%	19.3%
<b>Number in Travel Party (all visitors)</b>								
<b>Base:</b>	<b>757</b>	<b>58</b>	<b>186</b>	<b>473</b>	<b>597</b>	<b>142</b>	<b>18</b>	<b>178</b>
<b>Total</b>	<b>2.70</b>	<b>2.32</b>	<b>2.90</b>	<b>2.67</b>	<b>2.72</b>	<b>2.53</b>	<b>2.00</b>	<b>3.01</b>
Under the age of 18	0.31	0.36	0.43	0.23	0.31	0.38	0.17	0.32
18 or over	2.39	1.96	2.47	2.44	2.41	2.15	1.83	2.69

# HOUSEHOLD COMPOSITION: MARITAL & CHILDREN AT HOME

- 47% (versus 51%) are married/partnered while 36% (versus 30%) are single adults.

**Table 44a – Household Composition**

	Total	Residence			Lodging			Total Tour
		Cal	Other US	All Int'l.	Day	Hotel	Home/Other	
<b>Base:</b>	<b>757</b>	<b>58</b>	<b>186</b>	<b>473</b>	<b>597</b>	<b>142</b>	<b>18</b>	<b>178</b>
Married/domestic partner heterosexual	45.0%	42.9%	52.1%	42.8%	44.4%	54.6%	50.0%	40.7%
Single heterosexual adult	34.0%	28.9%	30.1%	35.1%	34.6%	21.2%	41.7%	27.4%
Extended generation family group	7.2%	0.9%	5.7%	8.4%	7.1%	11.1%	0.0%	12.3%
Group of unrelated adults	6.1%	16.5%	5.8%	5.3%	6.3%	3.3%	0.0%	8.3%
Empty Nester(s)	2.6%	1.7%	2.3%	3.1%	2.7%	1.9%	0.0%	6.3%
Married/domestic partner LGBT	1.8%	3.9%	1.4%	1.9%	1.6%	5.3%	5.6%	2.0%
Single lesbian/gay/bi/trans adult	1.7%	3.5%	1.0%	1.7%	1.7%	1.4%	0.0%	1.6%
Other	1.1%	1.7%	1.6%	0.9%	1.1%	0.6%	0.0%	0.4%

- Nearly 4 in ten or 39% (versus 39%) have children at home; those who do have an average of 1.8 (versus 1.5) children at home.

**Table 44b – Children at Home**

Percent with children	Total	Residence			Lodging			Total Tour
		Cal	Other US	All Int'l.	Day	Hotel	Home/ Other	
<b>Base:</b>	<b>757</b>	<b>58</b>	<b>186</b>	<b>473</b>	<b>597</b>	<b>142</b>	<b>18</b>	<b>178</b>
Total	38.9%	43.9%	48.5%	32.8%	38.4%	47.1%	50.0%	41.5%
Total avg. children at home	1.77	1.79	1.87	1.71	1.76	1.93	1.17	1.92

# VISITORS ABOUT 2 YEARS YOUNGER THAN IN 2007

- Respondents' median age was 36.3 (versus 38.6) years, indicating a slightly younger demographic.
- Further, 57% (versus 53%) were under age 40.
- Hotel guests were the oldest segment at nearly 42( versus 43), while International visitors were the youngest at about 35 (versus 38). Due to their high share/ volume are likely the reason for the overall drop in age.

**Table 45 – Respondent Age**

	Total	Residence			Lodging			Total Tour
		Cal	Other US	All Int'l.	Day	Hotel	Home/Other	
<b>Base:</b>	<b>757</b>	<b>58</b>	<b>186</b>	<b>473</b>	<b>597</b>	<b>142</b>	<b>18</b>	<b>178</b>
18-29	34.2%	28.6%	29.3%	37.6%	35.2%	16.7%	33.3%	38.6%
30-39	23.0%	25.6%	19.9%	22.1%	22.9%	26.5%	16.7%	12.9%
40-49	24.6%	27.7%	32.2%	22.2%	24.2%	30.9%	33.3%	30.7%
50-59	13.0%	15.1%	14.5%	12.2%	12.8%	17.8%	8.3%	11.1%
60+	4.9%	3.0%	3.5%	5.9%	4.8%	7.5%	2.8%	6.7%
DK/ No response	0.2%	0.0%	0.7%	0.0%	0.1%	0.6%	5.6%	0.0%
<b>Mean:</b>	<b>37.27</b>	<b>38.04</b>	<b>38.47</b>	<b>36.78</b>	<b>37.05</b>	<b>41.61</b>	<b>36.79</b>	<b>37.55</b>
<b>Median:</b>	<b>36.30</b>	<b>37.87</b>	<b>39.65</b>	<b>35.11</b>	<b>35.94</b>	<b>41.62</b>	<b>37.83</b>	<b>38.33</b>

# VISITORS PROFILE SKEWED FEMALE

- Overall 61% (versus 55%) of respondents were female with 39% (versus 45%) being male, showing a female skew both now and in 2007 and across all segments.
- While this is the respondent profile, given the importance of shopping Beverly Hills is likely to attract more female than male visitors.

**Table 46 – Respondent Gender**

	Total	Residence			Lodging			Total Tour
		Cal	Other US	All Int'l.	Day	Hotel	Home/Other	
<b>Base:</b>	<b>757</b>	<b>58</b>	<b>186</b>	<b>473</b>	<b>597</b>	<b>142</b>	<b>18</b>	<b>178</b>
Female	60.7%	63.2%	65.6%	57.7%	60.9%	58.8%	55.6%	67.0%
Male	39.3%	36.8%	34.4%	42.3%	39.1%	41.2%	44.4%	33.0%

Note: This result represents the respondent and may vary from visitors' total actual profile.

# HOUSEHOLD INCOME

- Respondents' reported average (mean) annual household income of \$129,600 (versus \$155,600), a sizable decrease since 2007.
- Home visitors reported the highest household income at \$236,900 (versus \$202,500), the only segment showing a rise, followed by Hotel guests at \$213,200 (\$253,200).
- Californians at \$102,900 (versus \$145,800), and Tour users at \$107,900 had the lowest income.
- The drop in average age and other demographic shifts is likely accountable for the drop in reported household annual income.

**Table 47 – Annual Household Income**

	Total	Residence			Lodging			Total Tour
		Cal	Other US	All Int'l.	Day	Hotel	Home/Other	
<b>Valid Base: Provided income</b>	<b>625</b>	<b>46</b>	<b>161</b>	<b>385</b>	<b>492</b>	<b>118</b>	<b>15</b>	<b>149</b>
Under \$30,000	9.1%	18.0%	7.5%	9.1%	9.5%	0.0%	16.1%	9.5%
\$30,000 - \$49,999	12.1%	12.1%	12.1%	12.4%	12.2%	10.4%	9.7%	9.1%
\$50,000 - \$74,999	18.3%	13.8%	12.2%	20.5%	18.6%	17.4%	0.0%	17.2%
\$75,000 - \$99,999	21.0%	22.8%	19.9%	22.4%	21.5%	10.7%	25.8%	25.4%
\$100,000 - \$199,999	26.1%	24.9%	32.1%	22.6%	25.8%	32.6%	19.4%	33.2%
\$200,000 - \$500,000	11.6%	8.4%	15.6%	10.7%	11.2%	19.1%	9.7%	5.5%
Over \$500,000	1.8%	0.0%	0.7%	2.3%	1.2%	9.7%	19.4%	0.1%
<b>Mean/average:</b>	<b>\$129,600</b>	<b>\$102,900</b>	<b>\$138,500</b>	<b>\$127,500</b>	<b>\$123,800</b>	<b>\$213,200</b>	<b>\$236,900</b>	<b>\$107,900</b>
<b>Median:</b>	<b>\$87,500</b>	<b>\$81,600</b>	<b>\$97,900</b>	<b>\$83,900</b>	<b>\$86,300</b>	<b>\$135,100</b>	<b>\$98,400</b>	<b>\$89,000</b>

# **Appendix**

## **Research Approach**

### **How to read the Tables**

### **Interviewing Locations**

## OVERALL OBJECTIVES – VALID MEASURES & DETAILED PROFILE OF BEVERLY HILLS TOURISM

- One main study objective is **quantitative estimates** of annual visitor volume, and tourism's economic and fiscal contributions for Beverly Hills, specifically:
  - number of visitors
  - number of visitor days
  - visitor direct spending impact
  - fiscal/taxes impact to the city from visitor spending
  - the number of local jobs supported by visitor spending
  
- The other main objective is a **visitor profile** of key demographic and trip behaviors:
  - geographic origin
  - purpose of visit (pleasure, business, meeting, etc.)
  - main and other trip destination(s)
  - transportation – to the region, to the city, around the city
  - activities and attractions/venues visited in Beverly Hills
  - information sources before and during the trip
  - destination satisfaction ratings
  - seasonality of visit
  - average length of stay – day and overnight
  - lodging type and reservations
  - visitor spending by category
  - travel group type; average group size
  - visitor age, gender, household income, household composition

# APPROACH & QUALIFIED RESPONDENT BASE

- Study data was collected in three “waves,” i.e., interview periods, Summer 2013 (August), Fall/ Winter 2013 (November) and Spring 2014 (April), comprising the “year,” 2013-14.
  - 757 total interviews, or about 250 per wave were completed.
  - The total sample has an error factor of +/- 3.6%.
- Professional interviewers randomly intercepted people in downtown Beverly Hills, at popular sites as listed on the next slide,.
  - Surveys were conducted on hand-held tablet computers then automatically downloaded for tabulating.
- Interviewers asked and tallied residence; of 1,379 groups approached, 57% were non-local “visitors,” and 43% were Los Angeles County residents (could include Beverly Hills residents). The survey then was conducted among qualified visitors. (Not all 784 qualified interviews may have been completed or were usable)

**Table 48 – Result of On-Site Approach**

	Total %	Total #
<b>Base: approached</b>	<b>1379</b>	<b>1379</b>
Visitor(s)	56.9%	784
LA County Resident(s)	43.1%	595

# INTERVIEWING LOCATIONS

- Visitors were intercepted in eleven locations as shown below, with fairly even distribution among the sites throughout the area.
- Of the three visitor studies conducted (2004, 2007, 2013-14), this is the first with interviewing in hotel lobbies, making the resulting profile more representative.

**Table 49 - Intercept Interview Locations**

	Total	Summer 2013	Fall/Winter 2013	Spring 2014	Residence			Lodging			Total Tour
					Cal	Other US	All Int'l.	Day	Hotel	Home/ Other	
<b>Base:</b>	<b>757</b>	<b>253</b>	<b>252</b>	<b>252</b>	<b>58</b>	<b>186</b>	<b>473</b>	<b>597</b>	<b>142</b>	<b>18</b>	<b>178</b>
Two Rodeo	16.2%	12.6%	23.8%	12.3%	12.1%	16.7%	15.9%	17.4%	10.6%	22.2%	12.4%
Rodeo Drive (N. 200-400 block)	15.3%	12.3%	18.7%	15.1%	13.8%	20.4%	13.5%	16.2%	12.0%	11.1%	12.4%
BH Visitors Center (SM @ Canon)	11.8%	13.4%	6.7%	15.1%	24.1%	9.7%	11.2%	12.7%	7.0%	16.7%	7.3%
Wilshire at Beverly Wilshire	11.1%	8.3%	13.9%	11.1%	15.5%	11.3%	10.1%	9.0%	19.7%	11.1%	8.4%
Dayton @ Rodeo (@ Louis Vitton)	11.0%	10.3%	11.5%	11.1%	6.9%	10.2%	12.3%	12.1%	7.7%	0.0%	20.2%
BH Park-BH Sign (SM bt Canon & Beverly)	10.3%	14.6%	0.0%	16.3%	6.9%	10.2%	11.0%	11.1%	7.0%	11.1%	4.5%
3rd Street @ Foothill	9.1%	13.4%	8.7%	5.2%	5.2%	6.5%	11.2%	10.6%	4.2%	0.0%	28.1%
Canon Drive (N. 200-400 block) + Bev-Canon Gardens	8.6%	9.5%	9.9%	6.3%	6.9%	10.2%	7.4%	7.7%	10.6%	22.2%	4.5%
Luxe Rodeo Hotel	6.2%	4.3%	6.7%	7.5%	6.9%	4.8%	7.0%	2.7%	21.1%	5.6%	2.2%
Other hotel	0.4%	1.2%	0.0%	0.0%	1.7%	0.0%	0.4%	0.5%	0.0%	0.0%	0.0%

## HOW TO READ THE TABLES

- In the summary, the results are presented in narrative form accompanied by summary tables with percentages for the following sub-groups as labeled below:

	Total	Annual						Total Tour
		Residence			Lodging			
		Cal	Other US	All Int'l.	Day	Hotel	Home/Other	
<b>Base:</b>	<b>757</b>	<b>58</b>	<b>186</b>	<b>473</b>	<b>597</b>	<b>142</b>	<b>18</b>	<b>178</b>

- Total** = All respondents (cumulative)
- Residence:** California, Other U.S. states (excl. Cal.), International
- Lodging:** *Day only* (not lodging overnight in BH); BH *Hotel* guest and guests in private Homes or Other lodging
- Total Tour:** Total arriving to or getting around Beverly Hills on any local or long distance tour coach or any Hop-On-Off local tour vehicle.