STAFF REPORT

Meeting Date:	February 17, 2015
To:	Honorable Mayor & City Council
From:	Megan Roach, Marketing & Economic Sustainability Manager MR
Subject:	BHCVB Visitor Impact Study Key Findings
Attachments:	1.) Beverly Hills Tourism Economic & Fiscal Impacts and Visitor Profile 2013-14 Final Report

INTRODUCTION

This report transmits the study methodology and key findings from a visitor impact study commissioned by the Beverly Hills Conference and Visitors Bureau.

DISCUSSION

The Beverly Hills Conference and Visitors Bureau ("BHCVB") is contracted by the City to conduct a variety of tourism and marketing programs promoting Beverly Hills. The BHCVB's mission is to promote Beverly Hills worldwide as a stay/shop/dine destination, through marketing programs that build awareness and drive tourism revenue to the city.

The City's annual funding agreement with BHCVB includes a work program for a comprehensive visitor and tourism economic impact study. BHCVB commissioned Lauren Schlau Consulting for the study, a Los Angeles-based market research and consulting firm specializing in economic development and tourism impact studies. The firm also conducted previous Beverly Hills studies in 2004 and 2007 and the final report contains comparisons to the 2007 data when available. The current market study was conducted among Beverly Hills visitors to:

- Profile seasonal and annual visitor characteristics for Fiscal Year 2013-14
- Measure annual visitor volume and visitor spending
- Measure annual fiscal (tax) impacts to the City from visitor spending
- Measure local employment supported by visitor activity

The study methodology included interviews with 757 visitor groups at popular Beverly Hills visitor sites over three seasons: summer 2013, fall/winter 2013 and spring 2014 to address differences in visitor traffic during the seasons. The interviews took place throughout the city's business areas including Two Rodeo Drive, in front of the Luxe

Rodeo Drive Hotel, the corner of Santa Monica and Wilshire and in front of the Visitor Center on Santa Monica Blvd. The data results from the study are annual, representing Fiscal Year (July) 2013 – (June) 2014.

In October 2014, BHCVB representatives presented the study preliminary findings to the CVB/Marketing Council Liaison Committee (Mayor Bosse and Councilmember Mirisch). Attachment No. 1 to the staff report includes the final report. A snapshot of the key findings includes:

- Total annual visitor volume of 6 million; a 24% increase from 2007.
- $47 million in tax revenue generated by visitors ($35 million in Transient Occupancy Tax and $12 million in Sales Tax); a 36% increase from 2007.
- 63% (vs. 42% in 2007) of visitors were international and 37% (vs. 58% in 2007) were domestic visitors.
- 94% (vs. 93% in 2007) of visitors came for the day.
- 5% (vs. 4% in 2007) of visitors stayed at city's hotels and represent 46% (vs. 38% in 2007) of the total visitor spend.
- Hotel guests spent an average of $632 per day (vs. $533 in 2007).
- Average-daily-spend for visitors is $236 per person (vs. $220 in 2007).
- Tour busses bring 24% of visitors who spend an average of $137 per person.

FISCAL IMPACT

There is no fiscal impact associated with this report.

RECOMMENDATION

Staff recommends the City Council receive the information included in the visitor and tourism economic impact study provided by the Beverly Hills Conference and Visitors Bureau.

CF

Cheryl Friedling

Approved By

Attachment 1

Lauren Schlau Consulting

Love Beverly Hills

Beverly Hills
Tourism Economic & Fiscal Impacts and Visitor Profile
2013-14

October 2014

Background & Objectives

- The Beverly Hills Conference & Visitors Bureau (BHCVB) markets Beverly Hills to non-local leisure and business visitors and supports the destination brand. BHCVB relies on current and comprehensive data about its visitors, applicable to marketing, programming & planning.
- A market study was conducted among Beverly Hills visitors in order to:
  - profile seasonal and annual **visitor characteristics** for 2013-14
  - measure annual **visitor volume** and **visitor spending**
  - measure annual **fiscal (tax) impacts to the City** from visitor spending
  - measure local **employment** supported by visitor activity
- As BHCVB conducted this research in 2004 and 2007, this study replicates these studies' design and execution. Comparisons are made to the 2007 study* to track trends and growth in the market over this now seven year period.

- Intercept interviewing was completed among 757 visitor groups at popular Beverly Hills visitor sites over three seasons/waves: Summer 2013; Fall/Winter 2013; Spring 2014.
- The data results are annual, representing fiscal year (July) 2013 – (June) 2014
- The study was conducted again by Lauren Schlau Consulting, a Los Angeles market research firm specializing in the travel/tourism industry.

*Throughout the report, numbers in ( ) next to the 2013-14 results are 2007 results where available.

Lauren Schlau Consulting

DEFINITION OF A VISITOR

- This study defines a visitor as: someone over age 18 who resides <u>outside</u> of Los Angeles County, visiting Beverly Hills for the day or overnight, for pleasure, vacation, business, to attend a conference/meeting or special event, but not for regular school or employment.

- This report uses the terms "visitor" and "tourist" interchangeably.

- The word "hotel" encompasses paid transient lodging properties unless noted otherwise.

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Beverly Hills 2013-14 Tourism; Record Volume & Strong Growth Since 2007

Overall, Beverly Hills' 2013-14 visitor dynamics propelled the visitor market to record levels.

- **Total Annual Visitor Volume: 6.0** (versus 4.9 in 2007) **million** visitors, a 24% rise
- **Total Annual Visitor Days: 7.1** (versus 5.8) **million,** up 24% spurred by longer stays and more Hotel and Day visitors
- **Daily Average Per-person Spending: $236** (versus $220), up 7%
- **Total Annual Spending: $1.69** (versus $1.27) **billion,** strong 33% growth from higher Hotel guest volume and their higher per-capita spending.
- **Lodging & Sales Tax: $46.6** ($34.2) **million** to the City of Beverly Hills from direct visitor spending.
- **Jobs:** Visitors supported nearly **11,500** (10,700) Beverly Hills **jobs**, 20% of the city's workforce. [1]

Table 1 - Summary Beverly Hills Tourism Impacts 2013-14 & 2007

	2013-14	2007	% Chg. fr. 2007
Total visitor volume	**6,016,300**	4,867,200	23.6%
Average length of stay (days all visitors)	**1.19**	1.18	.9%
Total visitor days	**7,115,800**	5,761,700	23.5%
Average daily spending per-person	**$235.80**	$ 219.80	7.3%
Total annual direct visitor spending	**$ 1,687,278,000**	$1,266,620,000	33.2%
Total direct & indirect visitor spending	**$ 2,193,461,400**	$1,646,606,000	33.2%
Total visitor generated Transient Occupancy Tax	**$ 34,775,300**	$ 25,970,000	33.9%
Total visitor generated sales tax	**$ 11,826,300**	$ 8,230,000	43.7%
Visitor supported jobs	**11,473**	10,665	7.6%

Source: Lauren Schlau Consulting and CIC Research Inc.

[1] Workforce of 56,930 as of 2012 the most current data; SCAG Beverly Hills Profile

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EXECUTIVE SUMMARY – OVERALL PROFILE (1)

- This year's study showed a strong shift to International visitors, accounting for 63% (versus 42% in 2007) of visitor volume.
- 30% (versus 49%) were visitors from Other U.S. areas (excluding California) with 7% (versus 9%) from California.
  - This significant shift to International visitors away from Other U.S. and California residents impacted virtually all related behaviors and indicators.
- By lodging, guests in Beverly Hills hotels totaled 5% (versus 4%) of visitor volume. Day visitor share remained at 93%-94%, while only 1% (versus 2%) stayed in local private homes.
- Visitor group size grew to 2.7 (versus 1.7) persons; overall length of stay up-ticked to 1.19 (versus 1.18) days.
- This study tracked tour bus arrivals to Beverly Hills. Overall 24% arrived by a tour vehicle, of which 6% used long distance motor coach and 18% used local hop-on bus, the latter contributing to higher Total and Day visitor volume and to more diverse visitors in terms of age, income and life-stage/household composition.
- Visitors in 2013-14 were younger, less affluent and fewer are married; however group size was larger, as more traveled in groups and families fewer solo than in 2007.

* Following the 2013-14 result, the comparable 2007 result is shown in parenthesis as (versus result)

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Executive Summary – Overall Profile (2)

- Most, 80% (versus 68%) were first-time visitors in the past three years, consistent with more International visitors who reside farthest from the destination.
  - These past Beverly Hills visitors, made 3.1 (versus 3.5) trips here in the past three years, a period during the recession that likely dampened trip taking.
- Most – nearly 90% (versus 89%) of visitors - continue to be highly satisfied with Beverly Hills as a destination and nearly 87% (91%) would recommend others to visit Beverly Hills. This is significant as referrals/recommendations are a main source of visitor trip decision making.
- 67% (versus 77%) of visitors were in Beverly Hills mainly for leisure/vacation.
- Beverly Hills was the main destination for 6% (versus13%), another influence of Internationals who tend to visit multiple destinations rather than one dominant place.
- 48% used any Internet media, visitors' most-used trip planning resource, replacing friends/family.

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Executive Summary – Overall Profile (3)

- Consistent with visitors' long-haul origin, most 74% (versus 80%) arrived into the Los Angeles region by commercial air, while 11% (versus 4%) rented a vehicle suggesting that more visitors arrived elsewhere then drove to the L.A. area. *
- 6% (versus 7%) of all Beverly Hills visitors stayed overnight in the city, thus 94% (versus 93%) were Day visitors in Beverly Hills.
  - Of those staying overnight in Beverly Hills, 98% (versus 70%) stayed in a hotel in the city.
  - Hotel guests stayed an average of 4.1 (versus 3.5) nights.
- Overall daily per-capita visitor spending in Beverly Hills averaged $236 (versus $220), up by nearly 7%.
  - Hotel guests spent far more than other segments, $632 (versus $588) daily per-capita in Beverly Hills.
- Respondents median age of 36 (versus 38)
- 47% (versus 53%) are married/partnered; 39% (both years) have children at home age 18 or younger.
- Annual average household income of $129,500 (versus $155,600)

* Specific airport used was asked in 2007 but not in 2013-14.

HOTEL GUESTS GENERATED 46% OF RECORD TOTAL VISITOR SPENDING

Viewing the results by visitor lodging [2] provides deeper insight, as discussed below and charted on the next slide and in Tables 2a and 2b.

- **Volume:** Of the current 6.0 (versus 4.9 in 2007) million total annual visitors:
  - 5.7 (versus 4.5) million were Day visitors, up 25%, with 94% (versus 93%) volume share
  - 299,400 (versus 233,100) stayed in Beverly Hills hotels, up 28% at 5.0% (versus 4.8%) of volume
  - 57,100 (versus 95,500) stayed in Home/Other Lodging, off 40%, at 1% (versus 2%) share
- **Visitor Days:** When factoring in each segments length of stay:
  - Day visitors, with a one day stay, accounted for 79% (versus 79%) of total visitor days
  - Hotel guests, who stayed 4.1 (versus 3.5) days, accounted for 1.2 million (versus 819,400) visitor days or17% (versus 14%) of total days, up 49% from 2007
  - Other Lodging guests, with 4.8 (versus 4.2) days' stay accounted for 276,000 (versus 403,700) visitor days, 4% (versus 7%) share of total days
- **Aggregated Total Spending:** Factoring in volume and per-capita spending:
  - Hotel guests spent a total of $771 (versus $482) million, a 60% surge, representing a 46% (versus 38%) share of total spending
  - Day visitors spent a total of $843 (versus $669) million, up 26%, but 50% (versus 53%) of the total
  - Other Lodging guests spent $72 (versus $116) million, off 38%, at 4% (versus 9%) of spending

[2] "Hotel" are guests in Beverly Hills paid lodging, "Other Lodging" are guests in private residences or non-paid Beverly Hills lodging; "Day" visitors are not overnight in Beverly Hills, though may stay overnight on this trip. For all segments "visitors" are non-LA County residents.

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VOLUME & SPENDING SHARE BY LODGING TYPE

Exhibit I -Visitor Share Comparison

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Strong Growth Since 2007 for Most Indicators, Esp. Hotel

Table 2a - Summary of Tourism Volume & Days* – 2013-14

Visitor Segment	Visitor Volume Number	Visitor Volume Ratio	% Chg. fr. 2007	Persons/ Group	Visitor Days* Number	Visitor Days* Ratio	% Chg. fr. 2007	Days in BH
Hotel	299,386	5.0%	28.4%	2.53	1,220,061	17.0%	48.9%	4.08
Private Home	57,095	0.9%	-40.2%	2.00	275,961	3.9%	-31.7%	4.83
Day Visitors	5,659,797	94.1%	24.7%	2.72	5,659,797	79.1%	24.7%	1.00
Total	**6,016,278**	**100.0%**	**23.6%**	**2.70**	**7,155,819**	**100.0%**	**24.2%**	**1.19**

Table 2b - Summary of Tourism Volume & Days* - 2007

Visitor Segment	Visitor Volume Number	Visitor Volume Ratio	Persons/ Group	Visitor Days* Number	Visitor Days* Ratio	Days in BH
Hotel	233,140	4.8%	1.72	819,403	14.2%	3.51
Private Home	95,542	2.0%	1.83	403,723	7.0%	4.23
Day Visitors	4,538,563	93.2%	1.74	4,538,563	78.8%	1.00
Total	**4,867,244**	**100.0%**	**1.74**	**5,761,689**	**100.0%**	**1.18**

* visitor days are calculated by multiplying visitor volume by length of stay. Thus two visitors staying three days = six visitor days.

RETAIL LION'S SHARE OF TOTAL VISITOR SPENDING

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- Of the $1.69 (versus $1.27) billion visitors spent in Beverly Hills in 2013-14, $990 (versus $580) million was on retail items. Representing 59% (versus 46%) of visitor spending, retail spiked 71% since 2007, reflecting retail's growth and its importance to both the Beverly Hills visitor experience and to the local economy.
- Lodging spending totaled $283 (versus $211) million, a 33% rise, and represented 16.8% share of spending both years.
- The third highest spending was for meals/snacks out at $219 (versus $192) million, a 14% increase, accounting for 13% (versus 15%) of spending share.
- Less than $80 million was spent on any of the other categories showing the significance of the top three categories.

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Visitor Spending in Beverly Hills

Table 3a - Visitor Spending in Beverly Hills by Category – 2013-14

Spending Category	% Who spent in Category	Average Daily Per-Person*	Total Visitor Spending	% chg. fr. 2007	Ratio of Total
Shopping/gifts	54.4%	$ 138.28	$ 989,510,868	70.7%	58.6%
Lodging	5.3%	$ 39.57	$ 283,170,370	33.9%	16.8%
Meals	64.2%	$ 30.64	$ 219,226,951	14.4%	13.0%
Beverages	56.5%	$ 10.59	$ 75,774,913	10.2%	4.5%
Attractions/museum/theater/club	7.6%	$ 6.12	$ 43,827,613	-3.8%	2.6%
Local transport/parking	29.9%	$ 5.19	$ 37,158,084	-59.4%	2.2%
Amenities; health club, spa, etc.	1.8	$ 4.77	$ 34,160,281	-39.7%	2.0%
Groc./conv./incidentals/other	2.1%	$ 0.62	$ 4,449,104	-79.2%	0.3%
Total	**86.7%**	**$ 235.79**	**$ 1,687,278,183**	**33.2%**	**100.0%**

Table 3b - Visitor Spending in Beverly Hills by Category - 2007

Spending Category	% Who spent in Category	Average Daily Per-Person*	Total Visitor Spending	Category Ratio
Shopping/gifts	71.3%	$ 100.60	$ 579,610,000	45.8%
Lodging	14.4%	$ 36.70	$ 211,470,000	16.7%
Meals	84.0%	$ 33.26	$ 191,610,000	15.1%
Local transport/parking	19.6%	$ 15.90	$ 91,590,000	7.2%
Beverages	82.6%	$ 11.94	$ 68,790,000	5.4%
Health/spa/beauty	9.7%	$ 9.83	$ 56,630,000	4.5%
Attractions/museum/theater/club	63.9%	$ 7.90	$ 45,540,000	3.6%
Groc./conv./incidentals	15.7%	$ 3.71	$ 21,380,000	1.7%
Total	**99.1%**	**$ 219.83**	**$ 1,266,620,000**	**100.0%**

Direct + Indirect Spending Breaks $2 Billion Level

- In addition to direct visitor spending, supplementary spending, known as indirect and induced impact, accrues to the local economy from goods and services purchased by the local tourism industry, and from local purchases made by tourism industry employees from their salary/earnings.
- Beverly Hills's indirect spending multiplier is **1.3** (as in the previous reports) based on economic modeling and analysis.
- Applying the 1.3 multiplier to the $1.69 (versus $1.27) billion of total annual direct visitor spending, yields an additional $506 (versus $380) million to the local economy, or a combined total direct and indirect spending impact of **$2.19** (versus $1.65) **billion** for 2013-14, now breaking the $2 billion mark.

Table 4 – Indirect & Induced Spending Impact

	2013-14	2007
Total Direct Visitor Spending	$ 1,687,278,183	$ 1,266,620,000
Multiplier	1.3	1.3
Additional Indirect + Induced Impact	$ 506,183,455	$ 379,986,000
Total Direct + Indirect + Induced Impact	**$ 2,193,461,638**	**$ 1,646,606,000**

Visitors Generated $46.6 Million Sales & Lodging Taxes to City of Beverly Hills

Direct visitor spending generates lodging and sales taxes to the City of Beverly Hills on taxable purchases.

- Total *net* taxable visitor spending reached $1.41 (versus $1.0) billion, generating $46.6 (versus $34.2) million in taxes to the City of Beverly Hills, a 36% increase.
- Total visitor generated taxes pays the equivalent of $3,100 of City provided services for each of Beverly Hills' 14,900 resident households.

Table 5 – Visitor Generated Taxes[1]

Sales Category	2013-14			2007		
	Taxable Spending	Tax Revenue	Ratio	Taxable Spending	Tax Revenue	Ratio
Lodging [2]	$ 248,395,000	$ 34,775,300	74.6%	$ 185,500,000	$ 25,970,000	76.4%
Taxable Items	$1,182,600,000	$ 11,826,300	25.4%	$ 820,900,000	$ 8,209,000	23.6%
Total	**$1,430,995,000**	**$ 46,601,600**	**100.0%**	**$1,006,400,000**	**$ 34,179,000**	**100.0%**

[1] The City realizes all of the 14% "transient occupancy" (lodging) tax and one percentage point of 9.25% sales tax on retail items, meals and beverages out, and a portion of groceries and local transportation. Other visitor activity related taxes (e.g., property, utility, business) are not measured for this study.
[2] Lodging taxes shown here are lower than reported by the City due to our eliminating 5% of revenue attributed to Beverly Hills residents staying in local hotels.

Visitors Supported Nearly 11,500 Local Jobs

Visitor spending supports tourism employment. [1]

- Total visitor spending and activity directly supported 11,473 (versus 10,665) jobs in Beverly Hills, an 8% increase over 2007.
- The key job categories are retail with 4,355 or 38% of the jobs, hotels with 3,037 jobs, at 27%, and restaurants with 2,252 employees, or 20% of the total.

Table 6 – Visitor Supported Local Employment

Taxable Category	Direct Tourism Jobs	Share of Total Tourism Jobs
Retail/shopping/gifts	4,355	38.0%
Paid lodging/hotels	3,037	26.5%
Restaurants/meal outlets	2,252	19.6%
Beverage outlets	778	6.8%
Attractions/museum/theater/clubs	357	3.1%
Local transportation/parking	410	3.6%
Amenities/health/spa	263	2.3%
Groc./conv./incidentals/other	20	0.2%
Total	**11,473**	**100.0%**

[1] – full-time equivalent positions

Lodging Market Reached New Demand & Rate Levels

- The current Beverly Hills hotel inventory consists of 2,111 (versus 1,933) daily available rooms.

- Of the total, 1,688 (versus 1,462) rooms are in the Luxury tier, with 423 (versus 471) rooms in the Boutique/Tourist tier. *
  - The growth was entirely in the Luxury tier with the addition of the Montage (201 rooms) in 2008, and 88 rooms for the AKA as of March 2014 when it became a transient property.

- The overall market reached a 77.7% (versus 76.6%) annualized occupancy rate for 2013-14, with 603,074 (versus 552,472) occupied rooms, up 9%.
  - The Luxury tier occupancy rate rose to 77.4% (versus 77.2%)
  - The Boutique/Tourist tier occupancy was 78.9% (versus 77.5%)

- The overall market realized a $436 (versus $390) annualized average daily rate for 2013-14, a 12% uptick.
  - The Luxury tier occupancy rate rose to $489 (versus $451), a 12% increase.
  - The Boutique/Tourist tier rate reached $ 228 (versus $200), a 14% increase.

* A 32 room property deemed below standards was removed from the Boutique/Tourist tier in 2013-14.

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2013-14 Lodging Market Exceeds 2007 Demand & Rate Levels

Table 7a - Beverly Hills Hotel Market Supply and Demand – 2013-14

Factor	20013-14 Hotel Performance					
	Citywide	% chg.	Luxury	% chg	Boutique/ Tourist	% chg
Daily Available Rooms	2,111	9.2%	1,688	15.4%	423	-10.2
Annual Available Rooms	775,883	9.2%	621,488	15.4%	154,395	-10.2
Ratio of Annual Available Rooms	100.0%		80.1%		19.9%	
Occupied Rooms	603,074	9.2%	481,268	14.8%	121,806	-8.6%
Ratio of Annual Occupied Rooms	100.0%		79.8%		20.2%	
Avg. Occupancy Rate	77.7%	1.4 %	77.4%	.3%	78.9%	.8%
Avg. Daily Room Rate (ADR)	$436	11.8%	$489	8.4%	$228	14%

Note: a small non-qualified property was removed from Tourist tier in 2013-14 reducing available and occupied rooms in that tier.

Table 7b - Beverly Hills Hotel Market Supply and Demand – 2007

Factor	2007 Hotel Performance		
	Citywide	Luxury	Boutique/Tourist
Daily Available Rooms	1,933	1,462	471
Annual Available Rooms*	705,612	533,683	171,929
Ratio of Annual Available Rooms	100.0%	75.6%	24.4%
Occupied Rooms	552,472	419,174	133,298
Ratio of Annual Occupied Rooms	100.0%	75.9%	24.1%
Avg. Occupancy Rate	76.6%	77.2%	77.5%
Avg. Daily Room Rate (ADR)	$390.00	$451.00	$200.00

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Growing Size & Economic Importance of International Visitors

- Beverly Hills's 2013-14 International visitor volume nearly doubled to 3.8 (versus 2.1) million, accounting for much of the total volume increase.
- Conversely, U.S. domestic visitation at 2.2 (versus 2.8) million decreased by 20%.
- And with the higher volume and far stronger daily per-capita spending, International visitor spending reached $1.2 billion, nearly doubling from $598 million in 2007.
- U.S. spending contracted by 23% to $514 (versus $669) million due to lower volume and per-capita spending.

Table 8 – International and U.S. Visitors*

	2013-14			2007		
	International	Domestic	Total	International	Domestic	Total
Total Visitors to Beverly Hills	3,774,700	2,241,600	6,016,300	2,052,000	2,815,000	4,867,000
Share of BH Visitors	62.7%	37.3%	100%	42.2%	57.8%	100%
Total Visitor Days	4,528,000	2,627,800	7,155,800	2,501,000	3,261,000	5,762,000
Share of Total Visitor Days	63.3%	36.7%	100%	43.4%	56.6%	100%
Avg. Days in Beverly Hills	1.20	1.17	1.19	1.22	1.16	1.18
Total Spending In Bev. Hills	$1,173,000,000	$ 514,000,000	$1,687,000,000	$ 598,000,000	$ 669,000,000	$1,267,000,000
Share of Visitor spending	69.5%	30.5%	100%	47.2%	52.8%	100%
Per Capita Daily Spending	$ 259	$ 196	$236	$ 239	$ 205	220
Avg. Days in Beverly Hills	1.20	1.17	1.19	1.22	1.16	1.18
Party Size (persons)	2.67	2.75	2.70	n/a	n/a	n/a

*includes day and overnight visitors

Overall Profile of Beverly Hills Visitors

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Table 9 – Summary of 2013-14 and 2007 Visitors

Characteristic	2013-14	2007
% International Visitor	**63%**	42%
% U.S. Resident Visitor (excl. California)	**30%**	49%
% California Resident	**7%**	9%
% First-Time/Repeat Visitor	**80%/20%**	68%/32%
Mean # Trips to Bev. Hills in past 3 years (repeat visitors)	**3.1**	3.5
% Visiting Beverly Hills for pleasure (main purpose)	**67%**	77%
% Beverly Hills Main Destination	**6%**	13%
% Arrived into the Los Angeles region by commercial air	**74%**	80%
% Arrived in Beverly Hills by motor coach or local tour van	**24%**	n/a
% Day Visitors/% overnight	**94%/6%**	93%/7%
Avg. stay in Beverly Hills - all hotel guests (days)	**4.08**	3.51
Avg. stay in Beverly Hills - home visitors (days)	**4.83**	4.23
Average travel group size (persons)	**2.70**	1.70
% traveling with children under 18 years of age	**18%**	22%
% married/partnered	**47%**	53%
% with children under 18 years old at home	**39%**	39%
Median age (respondent)	**36.3**	38.6
Average annual household income (current year)	**$129,500**	$155,600

Section 3

Detailed Findings

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Large Shift to International Visitor Origin Since 2007

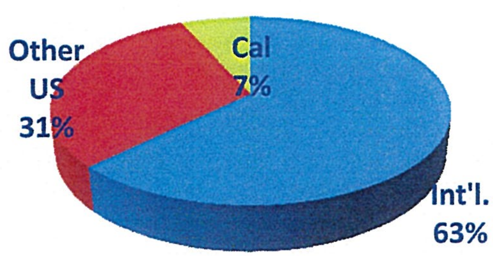
- Overall, two thirds or 63% (versus 42% in 2007) of Beverly Hills visitors reside in other countries, while 37% (versus 58%) are U.S. residents.
  - This is a notable reversal from the prior study, and mirrors the growth in International visitation nationally, statewide and in Los Angeles County since 2007.

- Separating Californians from Other U.S. states shows that only 7% (versus 9%) were in-state, with over 30% (versus 49%) from Other U.S. states.

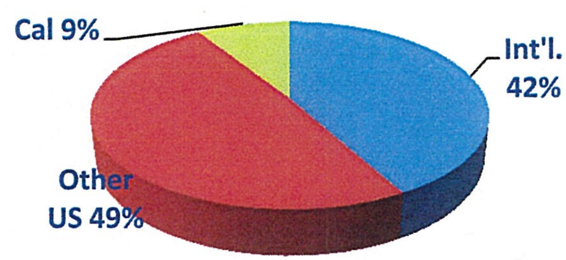
Table 10 – Overall Visitor Residence

	Total	Lodging			Total Tour
		Day	Hotel	Home/ Other	
Base:	**757**	**597**	**142**	**18**	**178**
International	62.7%	63.0%	63.5%	36.1%	77.5%
Other US	30.6%	30.4%	29.8%	55.6%	21.8%
California	6.7%	6.7%	6.7%	8.3%	0.7%

2013-14



2007



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U. S. & California Residence Detail

- Of U.S. residents, 18% (versus 15%) were from California, the top state, with New York second at 13% (versus 6%), and Texas with 9% (versus 5%).

- The top ten states accounted for 72% (versus 53%) of U.S. visitation.

Table 11 – U.S. Residency

	Total	Lodging		Total Tour
		Day	Hotel	
Base: US resident	**284**	**214**	**57**	**33**
California	17.9%	18.0%	18.3%	3.1%
New York	14.2%	14.1%	13.7%	7.2%
Texas	9.0%	9.0%	11.5%	14.3%
New Jersey	6.5%	7.0%	0.0%	15.3%
Illinois	5.1%	5.0%	5.3%	10.8%
Florida	5.0%	5.0%	6.9%	0.0%
Massachusetts	4.4%	4.7%	1.5%	0.0%
Ohio	4.1%	4.2%	5.3%	15.2%
Pennsylvania	3.1%	3.3%	0.8%	1.8%
Connecticut	2.9%	2.8%	0.8%	9.9%
Top 10	**72.2%**	**73.1%**	**64.1%**	**77.6%**

- Of Californians, the top feeder regions were Orange County with 25%, Central Coast with 16%, and San Diego with 14%.

Table 12 – California Residency *

	Total
Base: CA resident	**55**
Orange County (s)	25.1%
Central Coast (c)	15.7%
San Diego (s)	13.5%
Oakland/ East Bay (n)	8.5%
Montry/Sta Cruz/Sn Jose/ Palo Alto (c)	7.2%
San Bernardino-Riverside (s)	5.8%
Sacramento area (n)	5.8%
Bakersfield/ Mojave (c)	5.4%
Northern California (n)	3.6%
San Francisco (n)	3.6%
San Joaquin Valley/ Stockton (c)	3.1%
Other areas	2.7%

*This question was not asked in 2007
s = southern; c = central; n = northern

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INTERNATIONAL VISITOR RESIDENCY

- Of non-U.S. residents, 43% (versus 38%) were from Europe, dropping to 14% (versus 6%) from Asia, and 10% (versus 6%) from Australia/New Zealand, and the other regions shown below.

- Top counties (more than 3%) were United Kingdom with 11% (versus 15%), Australia/New Zealand at 10% (versus 6%,), Germany at 9% (versus 4%), and Italy at 6% (versus 5%), with the other top countries shown below.

Table 13 – International Regions

	Total	Lodging		Total Tour
		Day	Hotel	
Base: Int'l. visitor	**473**	**383**	**85**	**145**
Europe	42.6%	43.0%	30.7%	44.7%
Asia	14.4%	14.9%	6.6%	15.5%
Australia/New Zealand	10.4%	10.1%	17.5%	13.3%
South America	6.7%	6.9%	2.6%	2.6%
Central America/Caribbean	5.0%	5.2%	2.6%	5.0%
Canada - Eastern	4.9%	5.2%	0.0%	7.6%
Middle East	4.9%	4.0%	21.9%	2.3%
Mexico	4.4%	4.2%	8.3%	1.6%
Canada - Western	4.2%	4.1%	4.8%	2.9%
All Other	2.6%	2.4%	4.8%	4.7%

Table 14 – Top International Countries

	Total	Lodging		Total Tour
		Day	Hotel	
Base: Int'l. visitor	**473**	**383**	**85**	**145**
Utd. Kingdom	10.8%	10.8%	9.2%	16.0%
Australia/New Zealand	10.4%	10.1%	17.5%	13.3%
Germany	8.5%	9.0%	0.9%	9.9%
Italy	6.2%	6.1%	7.0%	2.3%
Central America/Caribbean	5.0%	5.2%	2.6%	5.0%
Canada - Eastern	4.9%	5.2%	0.0%	7.6%
Mexico	4.4%	4.2%	8.3%	1.6%
Canada - Western	4.2%	4.1%	4.8%	2.9%
France	4.0%	4.1%	3.1%	4.0%
Other Asia	3.9%	4.1%	0.9%	2.2%

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8 IN 10 FIRST-TIME VISITORS

- Most, 80% (versus 68%), were first-time visitors to Beverly Hills, while 20% (versus 32%) have visited in the past three years, identified as "repeat" visitors.
  - These repeat visitors came to the city an average of 3.1 (versus 3.5) times in the past three years, or slightly more than once per year.
  - Not surprisingly, Californians, due to proximity, visited most, averaging 4.6 (versus 12.0) times in the past three years, well below their frequency in 2007.
- Not surprisingly most Internationals, 87% (versus 77%), were first timers visitors here.
  - Moreover, 92% of Tour and 81% (versus 78%) of Day Visitors were first-timers, suggesting that many Tour and Day visitors were International visitors.

Table 15 - First-Time vs. Repeat Visitation

First-time or Repeat Visitor	Total	Residence			Lodging			Total Tour
		Cal	Other US	All Int'l.	Day	Hotel	Home/ Other	
Base:	**757**	**58**	**186**	**473**	**597**	**142**	**18**	**178**
None (in past three years)	80.3%	21.6%	80.4%	87.3%	81.3%	68.2%	50.0%	91.6%
Yes (in past three years)	19.7%	78.4%	19.6%	12.7%	18.7%	31.8%	50.0%	8.4%
1 time	6.8%	19.5%	7.6%	4.7%	6.4%	12.8%	16.7%	4.0%
2-3 times	7.1%	28.2%	6.7%	4.8%	6.8%	11.7%	11.1%	1.6%
4-6 times	3.6%	10.4%	4.3%	2.5%	3.6%	2.8%	8.3%	2.7%
7-10 times	1.5%	11.7%	0.6%	0.6%	1.3%	2.8%	11.1%	0.0%
11+ times	0.7%	8.6%	0.5%	0.1%	0.7%	1.7%	2.8%	0.0%
Mean (Incl. None):	**0.60**	**3.58**	**0.49**	**0.30**	**0.55**	**0.97**	**2.22**	**0.22**
Mean (Excl. None):	**3.06**	**4.57**	**2.52**	**2.39**	**2.96**	**3.06**	**4.44**	**2.59**

SIGHTSEEING/EXPLORING, VACATION & TO SHOP ARE TOP **MAIN** PURPOSES IN BH

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- Visitors' *main* purpose in Beverly Hills was sightseeing/exploring by 44% (versus 41%), with 23% (versus 36%) on vacation/pleasure, and 10% (versus 2%) here to shop.

Table 16 – Visitors' Top* MAIN Purpose in Beverly Hills

	Total	Residence			Lodging			Total Tour
		Cal	Other US	All Int'l.	Day	Hotel	Home/Other	
Base:	**757**	**58**	**186**	**473**	**597**	**142**	**18**	**178**
Sightseeing/exploring this area	43.8%	37.3%	45.0%	45.0%	45.5%	13.4%	27.8%	56.8%
Vacation/pleasure/ to visit	23.2%	9.1%	15.4%	28.9%	22.4%	42.1%	5.6%	23.5%
To go shopping	10.2%	9.1%	9.3%	10.8%	10.2%	10.0%	11.1%	3.6%
To visit relatives/friends/personal visit	4.7%	12.1%	6.6%	2.6%	4.5%	3.3%	33.3%	1.6%
Star/celebrity sighting	3.4%	1.7%	3.9%	3.6%	3.4%	3.9%	0.0%	3.4%
Passing through to another place	3.1%	1.7%	5.8%	2.3%	3.0%	1.7%	19.4%	5.2%
Combining business or meeting and pleasure	2.3%	2.6%	4.7%	1.0%	2.2%	5.3%	0.0%	0.2%
To conduct business	2.0%	3.4%	2.4%	1.8%	1.5%	11.1%	2.8%	3.3%

* purposes mentioned by more than 2% each.

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SIGHTSEEING/EXPLORING, VACATION & SHOPPING TOP ALL PURPOSES IN BH

- When adding visitors' *main* and *other* purposes in Beverly Hills, sightseeing/exploring tops the list, by 79% (versus 74%), with 56% (versus 54%) on vacation/pleasure/visit, 43% (44%) came to shop, and 35% (44%) to eat in local restaurants.

Table 17 – Visitors' Top* ALL Purposes in Beverly Hills

	Total	Annual						
		Residence			Lodging			Total Tour
		Cal	Other US	All Int'l.	Day	Hotel	Home/Other	
Base:	**757**	**58**	**186**	**473**	**597**	**142**	**18**	**178**
Sightseeing/ exploring this area	79.2%	62.4%	78.5%	81.7%	80.5%	58.8%	61.1%	91.5%
Vacation/ pleasure/ to visit	56.1%	30.7%	50.2%	64.0%	56.0%	63.5%	30.6%	73.5%
To go shopping	42.7%	42.9%	37.7%	45.6%	42.1%	54.3%	41.7%	33.0%
To eat in restaurants	34.9%	37.2%	33.8%	34.6%	34.2%	45.4%	44.4%	30.1%
Star/celebrity sighting	14.7%	3.5%	12.3%	17.3%	14.7%	14.2%	16.7%	24.0%
View public art in parks and gardens	9.4%	9.5%	6.8%	11.2%	9.5%	9.2%	2.8%	9.8%
To visit historic or architectural sites	9.4%	7.8%	7.0%	11.3%	9.8%	3.6%	0.0%	13.6%
To visit relatives/friends/personal visit	9.3%	19.5%	9.8%	6.7%	8.8%	13.4%	33.3%	2.8%
Passing through to another place	7.8%	6.1%	10.6%	7.0%	7.8%	5.0%	25.0%	13.9%
Combining business or meeting and pleasure	5.6%	4.3%	9.4%	4.0%	5.3%	11.1%	11.1%	4.1%

* purposes mentioned by more than 5% each.

REPUTATION/RECOMMENDATION MOST INFLUENTIAL ON VISITING FOR 84%

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- For over 83% *reputation/recommended* most influenced their visit, especially International visitors.
- 65% cited weather, 64% the city's celebrity/media image, more so for Tour and International visitors, and 57% its central location.

Table 18a – *Percent* Rating Item Influence

Percent saying extremely or very influential	Total	Residence			Lodging			Total Tour
		Cal	Other US	All Int'l.	Day	Hotel	Home/Other	
Base:	**757**	**58**	**186**	**473**	**597**	**142**	**18**	**178**
Reputation/heard about it/ recommended	83.5%	66.2%	78.4%	87.4%	83.9%	75.2%	83.3%	87.5%
The area weather	65.1%	41.0%	63.6%	68.2%	64.8%	67.4%	80.6%	69.7%
Celebrity or media image	64.4%	36.3%	57.5%	69.9%	65.5%	47.6%	38.9%	73.5%
Central location in LA area	57.5%	47.6%	56.2%	59.1%	57.4%	60.4%	58.3%	62.0%

note: this question is new in 2013-14

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Reputation/Recommendation Most Influential on Visiting

- On the basis of a mean score,* *reputation/recommendation* at 4.25 (out of 5) was by far rated most influential on visiting Beverly Hills.
- Weather was rated 3.77, celebrity/image was 3.73, and central location was 3.60.
- Compared to the total, all items were rated higher by International visitors and Tour users, with reputation/recommendation their top item as well.

Table 18b – *Mean* Rating Item Influence

Mean rating where 5=Most & 1=Least influential	Total	Residence			Lodging			Total Tour
		Cal	Other US	All Int'l.	Day	Hotel	Home/Other	
Base:	**757**	**58**	**186**	**473**	**597**	**142**	**18**	**178**
Reputation/heard about it/ recommended	4.25	3.52	4.08	4.40	4.27	3.97	4.06	4.45
The area weather	3.77	3.03	3.71	3.87	3.76	3.73	4.14	3.94
Celebrity or media image	3.73	2.76	3.54	3.90	3.76	3.24	3.03	4.05
Central location in LA area	3.60	3.29	3.54	3.67	3.60	3.64	3.61	3.79

* Scale: 5 = most to 1 = least influential for visiting Beverly Hills
this question is new in 2013-14

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8 IN 10 BH VISITORS GO TO RODEO DRIVE/2 RODEO

- Almost all, or 93% (versus 94%) of visitors visited at least one venue in Beverly Hills.
- An strong 86% (versus 92%) majority visited Rodeo Drive/Two Rodeo, while 40% (versus 38%) viewed Beverly Hills buildings/sights, and 21% both years toured stars' homes.
- Again, more International and Tour visitors went to these venues versus the Total.

Table 19 - Beverly Hills Venues Visiting

	Total	Residence			Lodging			Total Tour
		Cal	Other US	All Int'l.	Day	Hotel	Home/Other	
Base:	**757**	**58**	**186**	**473**	**597**	**142**	**18**	**178**
Rodeo Drive/2 Rodeo	86.4%	66.7%	84.5%	88.7%	86.7%	80.8%	86.1%	90.6%
Buildings or sights of Beverly Hills	40.2%	17.8%	39.4%	44.2%	40.8%	34.5%	13.9%	52.9%
Tour of stars' homes	21.0%	10.8%	20.4%	24.1%	21.0%	20.3%	25.0%	39.6%
Beverly Hills Visitor Center	13.7%	8.2%	7.7%	17.4%	13.8%	12.3%	8.3%	14.1%
Trolley Tour	11.6%	5.6%	15.5%	11.6%	11.2%	22.0%	0.0%	18.0%
Paley Center (Museum of Television & Radio)	4.7%	5.6%	5.3%	4.2%	4.6%	7.0%	2.8%	7.6%
Greystone Mansion	4.5%	5.6%	4.5%	4.4%	4.4%	7.5%	2.8%	3.6%
Virginia Robinson Gardens	2.9%	5.2%	3.7%	2.5%	2.6%	5.8%	8.3%	1.6%
Annenberg Center for the Performing Arts	2.7%	2.1%	7.1%	1.2%	2.5%	5.0%	11.1%	5.2%
Other area attractions/amusements	18.8%	19.0%	12.9%	19.3%	18.2%	28.7%	19.4%	19.8%
None of the above	7.0%	23.8%	6.7%	5.4%	6.8%	9.5%	8.3%	2.7%

INTERNET MAIN INFORMATION SOURCE FOR PLANNING THIS TRIP

- When planning this trip, 94% (both years) of visitors used information sources.
- 48% mainly relied on (all) Internet sources (i.e., general travel, state city or hotel websites, and mobile) for Beverly Hills information.
- 38% (versus 23%) used a general travel website, and 30% (versus 36%) consulted a family member/friend when planning.
- Not surprisingly, more Californians 39% (versus 43%) used past experience, while 57% of Tour users and 52% of International visitors mainly relied on the Internet.

Table 20 – Top Trip Planning Sources

	Total	Residence			Lodging			Total Tour
		Cal	Other US	All Int'l.	Day	Hotel	Home/ Other	
Base:	**757**	**58**	**186**	**473**	**597**	**142**	**18**	**178**
ANY INTERNET SOURCE	48.4%	35.6%	47.5%	52.3%	48.8%	45.4%	22.2%	57.3%
General travel website like travelocity.com	37.6%	25.6%	37.5%	40.5%	38.0%	34.8%	13.9%	50.5%
Relative/friend/word of mouth	29.9%	28.1%	36.1%	24.7%	29.9%	22.6%	75.0%	16.3%
Own experience/been here before	10.8%	39.4%	10.8%	6.6%	10.4%	16.7%	22.2%	4.2%
Travel Agent	8.6%	0.4%	6.0%	10.8%	8.3%	15.6%	0.0%	10.3%
Tour Operator	8.4%	1.7%	5.1%	11.1%	8.8%	2.2%	0.0%	24.9%
Social media/blogs/mobile apps	6.3%	2.6%	9.9%	5.3%	6.2%	6.7%	8.3%	8.3%
None	6.4%	16.8%	8.5%	4.8%	6.2%	11.1%	2.8%	2.5%

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Once in BH Visitors mainly used the Internet for Information

- Once in the city, 77% (versus 83%) of visitors used a source for area information.
- 29% mainly relied on (any) Internet sources (including general travel, state, city or hotel websites, and mobile).
- Another 19% (versus 34%) consulted a family member/friend, and 18% (versus 8%) relied a general travel website.
- Again, more Californians 35% (versus 39%) mainly used past experience, while Other U.S. and International visitors most relied on Internet sources.

Table 21 – Top* Info Sources Once in BH

	Total	Annual						Total Tour
		Residence			Lodging			
		Cal	Other US	All Int'l.	Day	Hotel	Home/Other	
Base:	**757**	**58**	**186**	**473**	**597**	**142**	**18**	**178**
ANY INTERNET SOURCE	28.7%	22.1%	23.7%	32.9%	28.7%	32.0%	19.4%	30.7%
Relative/friend/word of mouth	19.4%	11.7%	20.8%	16.5%	18.5%	31.5%	44.4%	6.3%
Travel website like travelocity.com	18.2%	18.6%	14.2%	20.9%	18.3%	19.2%	2.8%	26.0%
Tour Operator	11.7%	2.6%	10.5%	14.0%	12.3%	3.1%	0.0%	34.0%
Own experience/been here before	10.8%	35.0%	11.2%	6.9%	10.3%	17.0%	25.0%	4.2%
Retail or Auto Club guide books	6.0%	0.0%	3.3%	8.2%	6.0%	5.0%	11.1%	9.6%
Social media/blogs/mobile apps	5.3%	3.5%	7.7%	4.7%	5.2%	7.0%	8.3%	2.0%
Beverly Hills Visitor Center	4.5%	1.7%	1.9%	6.2%	4.5%	4.5%	0.0%	4.6%
None	22.6%	29.8%	27.3%	20.4%	22.7%	20.6%	19.4%	23.6%

*more than 4%

GOOGLE THE MAIN ELECTRONIC MEDIA FOR INFORMATION

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Those using any electronic media for planning or in the area specified the type.

- Most, nearly 74% used a Google search, another 32% used Trip Advisor/interactive sites, and 27% used a general travel website, each of these more so by International visitors.

Table 22 – Electronic/Internet Media Used for Information

	Total	Residence			Lodging		Total Tour
		Cal	Other US	All Int'l.	Day	Hotel	
Base: Used web	**418**	**21**	**100**	**283**	**334**	**78**	**126**
Google search engine	73.9%	74.8%	72.5%	74.2%	74.2%	72.0%	73.9%
Trip Advisor/interactive travel website	32.4%	8.8%	25.8%	36.4%	32.5%	29.0%	35.6%
Travel website, e.g. expedia, travelocity	27.1%	8.5%	13.9%	33.5%	26.8%	29.0%	29.4%
Facebook	8.9%	12.1%	7.2%	9.6%	8.8%	8.8%	10.5%
Other search engine	6.2%	0.0%	6.4%	6.4%	6.2%	7.3%	6.6%
Any mobile app	4.3%	0.0%	6.2%	3.8%	4.1%	9.3%	1.2%
Love Beverly Hills.com	3.6%	0.0%	2.5%	4.3%	3.5%	3.1%	0.0%
Twitter	3.5%	11.0%	2.9%	3.3%	3.4%	2.1%	2.4%
Instagram	3.3%	13.2%	3.8%	2.6%	3.1%	8.3%	3.0%
Any blog	2.6%	0.0%	4.8%	2.1%	2.6%	3.1%	3.6%
Pinterest	1.1%	0.0%	2.7%	0.7%	1.1%	2.1%	2.4%
Other web-based source/none of these	10.6%	9.9%	15.4%	8.3%	10.4%	17.1%	13.9%

This question is new in 2013-14

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BH Third-Named Main Trip Destination

- Los Angeles area was the overall *main destination* on this trip for 48% (versus 66%) of visitors, followed by14% (versus 4%) who said California/other western states.
- This year 6% (versus 13%) named Beverly Hills.
  - This is likely due to the high share of long-haul International and U.S. visitors who tend to target larger or multiple destinations for their first U.S. trip.
- BH was the main destination for 47% (versus 64%) of Hotel guests.

Table 23 – Main Destination on this Trip

	Total	Residence			Lodging			Total Tour
		Cal	Other US	All Int'l.	Day	Hotel	Home/Other	
Base:	**757**	**58**	**186**	**473**	**597**	**142**	**18**	**178**
Los Angeles region	47.6%	62.1%	65.8%	38.1%	49.2%	22.8%	16.7%	46.8%
California and/or other Western States	13.9%	0.0%	1.2%	21.4%	14.5%	5.8%	0.0%	12.4%
All of California	9.6%	0.0%	5.9%	10.9%	9.7%	9.2%	0.0%	8.3%
USA (California plus other areas)	8.4%	0.0%	0.0%	13.3%	8.5%	7.8%	0.0%	14.8%
Southern California areas (non-LA, Santa Barbara to San Diego)	8.2%	4.3%	14.9%	6.2%	8.6%	1.1%	2.8%	12.3%
Beverly Hills	**6.3%**	**28.9%**	**7.4%**	**3.1%**	**3.5%**	**46.8%**	**69.4%**	**2.1%**
Other California (Central Coast, SFO, No. Cal, etc.)	3.6%	3.5%	2.6%	4.2%	3.6%	2.8%	11.1%	1.6%
All other areas (not listed above)	2.2%	0.0%	1.8%	2.7%	2.2%	1.7%	0.0%	1.4%
None/ No other	0.2%	1.2%	0.5%	0.0%	0.1%	1.9%	0.0%	0.3%

Most Beverly Hills Visitors Also Went to Hollywood & Santa Monica

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Beverly Hills visitors also visiting the Los Angeles area specified where as follows. *

- The most visited other areas included Hollywood by 87% of visitors, Santa Monica by 75%, Venice by 53% and 50% went to Downtown Los Angeles.
- Far more International and Tour visitors went to these other places versus other segments and the Total.

Table 24 – Specific Los Angeles Areas Also Visiting

	Total	Residence			Lodging			Total Tour
		Cal	Other US	All Int'l.	Day	Hotel	Home/Other	
Base: Visiting LA	**670**	**41**	**166**	**427**	**549**	**110**	**11**	**166**
Hollywood	87.1%	59.3%	81.4%	92.1%	87.8%	75.4%	66.7%	97.2%
Santa Monica	75.1%	45.0%	69.9%	80.7%	75.6%	69.1%	54.2%	85.8%
Venice	53.0%	18.6%	47.3%	58.7%	53.4%	48.4%	33.3%	67.7%
Downtown LA	50.0%	29.2%	52.8%	51.8%	51.1%	29.1%	29.2%	57.0%
West Hollywood	41.9%	22.5%	36.7%	46.5%	42.1%	37.5%	50.0%	46.6%
Anaheim/Disneyland/Orange County Area	19.6%	8.8%	18.4%	21.4%	19.2%	28.8%	12.5%	27.5%
Pasadena	12.7%	12.1%	7.9%	15.3%	13.0%	8.4%	0.0%	17.3%
Marina Del Rey	11.9%	7.7%	7.7%	13.4%	12.0%	8.8%	12.5%	10.6%
Inland Valleys	10.1%	7.7%	10.5%	10.2%	10.2%	9.8%	0.0%	17.0%
None of the above/Other LA area	4.0%	11.5%	4.4%	3.2%	3.9%	3.5%	12.5%	2.1%

* this question is new in 2013-14

THREE-QUARTERS ARRIVED INTO THE LA REGION BY AIR

- Most visitors, 74% (versus 80%) arrived into the Los Angeles region by commercial airplane.
- Another 11% (versus 4%) used a rental vehicle, suggesting that they arrived elsewhere by plane then drove to the region.
  - 84% on a tour, 82% (versus 84%) of Other U.S. 77% and (versus 89%) of International visitors arrived into the region via commercial airline.

Table 25 – Mode of Arrival into the Los Angeles Region

	Total	Residence			Lodging			Total Tour
		Cal	Other US	All Int'l.	Day	Hotel	Home/Other	
Base:	**757**	**58**	**186**	**473**	**597**	**142**	**18**	**178**
Commercial airline	73.8%	11.2%	81.6%	77.2%	73.4%	81.6%	66.7%	83.6%
Rental vehicle	10.8%	0.4%	5.3%	13.1%	11.0%	8.4%	11.1%	3.9%
Personal vehicle	9.2%	84.9%	8.3%	2.4%	9.2%	6.7%	22.2%	0.0%
Private Motor Coach/tour bus/van	3.6%	0.0%	2.3%	4.8%	3.8%	1.1%	0.0%	10.7%
Public bus	0.8%	0.0%	0.2%	1.1%	0.8%	0.0%	0.0%	0.4%
Train/Amtrak	0.7%	0.9%	0.5%	0.7%	0.7%	0.6%	0.0%	1.2%
Private/charter airplane	0.4%	0.0%	1.4%	0.0%	0.4%	0.3%	0.0%	0.0%
RV/motorhome	0.2%	0.0%	0.5%	0.2%	0.2%	0.0%	0.0%	0.0%
Other	0.5%	2.6%	0.0%	0.5%	0.5%	1.4%	0.0%	0.1%

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More Arrived into Beverly Hills by Rental Car

- The high share flying into the region likely relates to the 40% (versus 46%) of visitors who *arrived in Beverly Hills* by rental vehicle.
- Another 18% (versus 32%) who arrived by personal vehicle, while 18% used a local tour bus/van into Beverly Hills.

Table 26 – Arrival Mode into Beverly Hills

	Total	Annual						
		Residence			Lodging			Total Tour
		Cal	Other US	All Int'l.	Day	Hotel	Home/ Other	
Base:	**757**	**58**	**186**	**473**	**597**	**142**	**18**	**178**
Rental vehicle	40.1%	6.5%	45.9%	40.1%	40.0%	44.8%	27.8%	10.7%
Personal/borrowed vehicle	18.6%	84.5%	21.3%	10.6%	18.7%	10.0%	55.6%	0.8%
Local/hop-on, hop off tour bus/van	17.9%	1.7%	16.5%	21.2%	19.0%	1.1%	0.0%	62.5%
Taxi	6.4%	0.9%	4.6%	7.4%	5.6%	19.5%	13.9%	2.8%
Private Motor Coach/tour bus/van	5.7%	1.2%	2.1%	8.1%	5.8%	5.0%	0.0%	19.9%
Public bus	5.6%	0.9%	3.7%	6.9%	5.9%	0.0%	0.0%	2.4%
Hotel/airport shuttle or limousine	1.9%	0.0%	2.2%	1.9%	1.2%	13.6%	2.8%	1.0%
Walking	1.4%	2.6%	2.3%	1.0%	1.3%	3.6%	0.0%	0.0%
Private Limousine	1.0%	0.0%	0.1%	1.4%	0.9%	2.2%	0.0%	0.0%
Other	1.4%	1.7%	1.4%	1.5%	1.5%	0.0%	0.0%	0.0%

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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	
Base:	**757**	**58**	**186**	**473**	**597**	**142**	**18**	**178**
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%

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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
Base: Used Local Tour Bus/Van	**148**
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.

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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.

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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.

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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	
Base:	**757**	**58**	**186**	**473**	**597**	**142**	**18**	**178**
Percent staying overnight								
Total	97.7%	74.8%	100.0%	99.3%	97.5%	100.0%	100.0%	99.6%
In Beverly Hills	**5.9%**	**6.2%**	**6.5%**	**5.6%**	**0.0%**	**100.0%**	**100.0%**	**2.9%**
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%
Nights Away by *All* Beverly Hills visitors in:								
Total	12.05	3.11	6.43	15.84	12.23	9.46	7.47	13.81
Beverly Hills	**0.25**	**0.21**	**0.25**	**0.26**	**0.00**	**4.08**	**4.83**	**0.14**
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
Nights Away by *Overnight* Beverly Hills visitors in:	**160**	**11**	**49**	**90**	**359**	**40**	**18**	**18**
Total	12.33	4.15	6.43	15.96	12.54	9.46	7.47	13.87
Beverly Hills	**4.20**	**3.45**	**3.78**	**4.57**	*	**4.08**	**4.83**	**4.64**
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
Base: Overnight in BH	**142**
Hotel	98.6%
Other/home/corporate apartment/condo/ vacation rental (unpaid or paid)	1.4%

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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.
Base: Overnight in BH hotel	**141**	**40**	**84**
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.
Base: Overnight in BH hotel	**141**	**40**	**84**
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%
Median (weeks):	**5.17**	**4.36**	**6.24**

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.	
Valid Base: Day visitor to BH	**576**	**44**	**135**	**368**	**157**
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%
Mean:	**3.12**	**3.30**	**3.07**	**3.22**	**2.96**

Visitor Spending

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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% (versus100%), 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	
Base:	**757**	**58**	**186**	**473**	**597**	**142**	**18**	**178**
Total	**86.7%**	**91.9%**	**87.1%**	**85.8%**	**86.1%**	**100.0%**	**77.8%**	**75.0%**
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%

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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%
Total	**$ 235.79**	**$ 1,687,278,183**	**100.0%**

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%
Total	**$ 632.30**	**$ 771,441,509**	**100.0%**	**$ 262.17**	**$ 72,349,422**	**100.0%**	**$ 149.03**	**$843,487,252**	**100.0%**

DAILY SPENDING SHARE – ALL VISITORS & HOTEL GUESTS

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Exhibit 2a - Spending Share – All Visitors

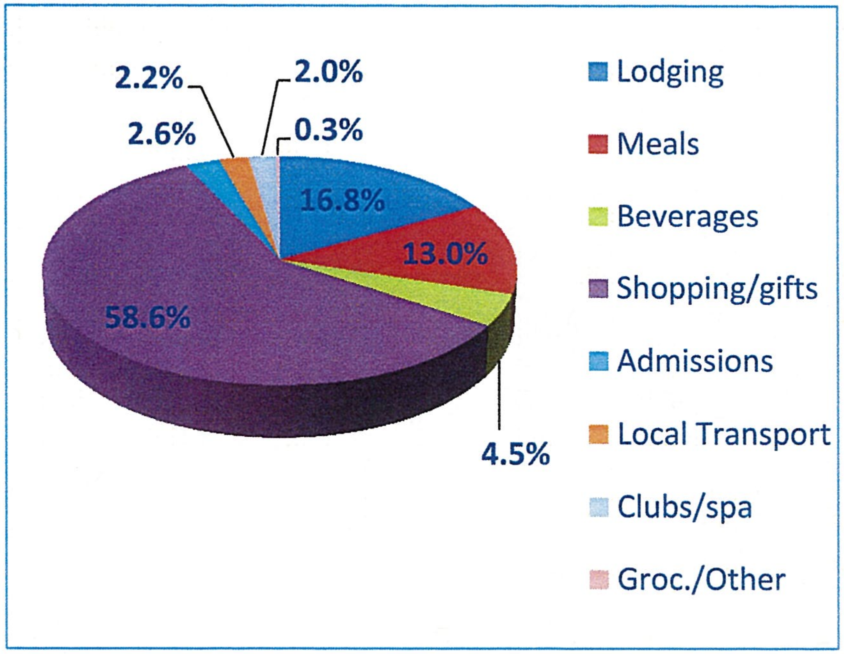
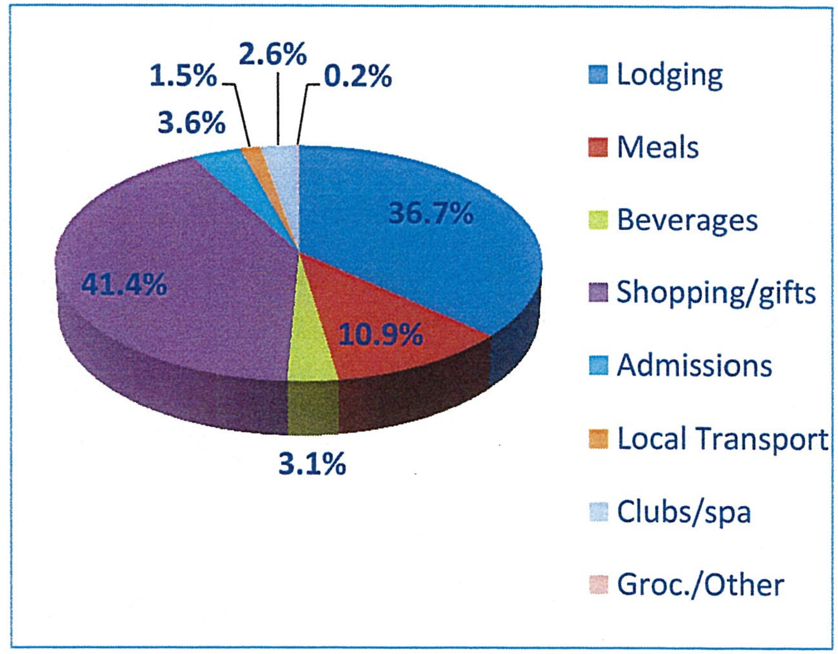


Exhibit 2b Spending Share – Hotel Guests



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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+
Base:	**757**	**58**	**186**	**473**	**597**	**142**	**18**	**178**	**32**	**148**	**73**	**364**	**261**
Total	**235.79**	**244.00**	**177.05**	**259.13**	**149.03**	**632.30**	**262.17**	**136.98**	**154.87**	**131.14**	**108.79**	**161.61**	**339.80**
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

Lauren Schlau Consulting

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	
Base:	**757**	**58**	**186**	**473**	**597**	**142**	**18**	**178**
Extremely satisfied	41.2%	42.3%	39.5%	42.5%	40.5%	51.8%	58.3%	36.9%
Very satisfied	47.5%	43.8%	47.8%	46.7%	47.8%	44.3%	36.1%	49.5%
Extr. + very	**88.7%**	**86.1%**	**87.4%**	**89.2%**	**88.3%**	**96.1%**	**94.4%**	**86.5%**
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%
Mean rating (5=Extr. sat., 1=Very unsat.):	**4.27**	**4.27**	**4.22**	**4.30**	**4.26**	**4.47**	**4.53**	**4.19**

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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	
Base: Satisfied with BH	**674**	**53**	**168**	**417**	**523**	**134**	**17**	**154**
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

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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 – Likeliness to Recommend Beverly Hills to Others

	Total	Residence			Lodging			Total Tour
		Cal	Other US	All Int'l.	Day	Hotel	Home/ Other	
Base:	**757**	**58**	**186**	**473**	**597**	**142**	**18**	**178**
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	**86.6%**	**79.7%**	**85.1%**	**88.1%**	**86.4%**	**89.4%**	**91.7%**	**90.1%**
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%
Mean rating (5=Extr. likely, 1=Very unlikely):	**4.31**	**4.15**	**4.25**	**4.35**	**4.31**	**4.42**	**4.46**	**4.33**

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

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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 41 – Beverly Hills Character if a Person

	Total	Residence			Lodging			Total Tour
		Cal	Other US	All Int'l.	Day	Hotel	Home/Other	
Base:	**757**	**58**	**186**	**473**	**597**	**142**	**18**	**178**
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	
Base:	**757**	**58**	**186**	**473**	**597**	**142**	**18**	**178**
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	
Base:	**757**	**58**	**186**	**473**	**597**	**142**	**18**	**178**
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%
Number in Travel Party (all visitors)								
Base:	**757**	**58**	**186**	**473**	**597**	**142**	**18**	**178**
Total	**2.70**	**2.32**	**2.90**	**2.67**	**2.72**	**2.53**	**2.00**	**3.01**
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

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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	
Base:	**757**	**58**	**186**	**473**	**597**	**142**	**18**	**178**
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	
Base:	**757**	**58**	**186**	**473**	**597**	**142**	**18**	**178**
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	
Base:	**757**	**58**	**186**	**473**	**597**	**142**	**18**	**178**
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%
Mean:	**37.27**	**38.04**	**38.47**	**36.78**	**37.05**	**41.61**	**36.79**	**37.55**
Median:	**36.30**	**37.87**	**39.65**	**35.11**	**35.94**	**41.62**	**37.83**	**38.33**

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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	
Base:	**757**	**58**	**186**	**473**	**597**	**142**	**18**	**178**
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.

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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	
Valid Base: Provided income	**625**	**46**	**161**	**385**	**492**	**118**	**15**	**149**
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%
Mean/average:	**$129,600**	**$102,900**	**$138,500**	**$127,500**	**$123,800**	**$213,200**	**$236,900**	**$107,900**
Median:	**$87,500**	**$81,600**	**$97,900**	**$83,900**	**$86,300**	**$135,100**	**$98,400**	**$89,000**

Appendix

Research Approach
How to read the Tables
Interviewing Locations

Overall Objectives – Valid Measures & Detailed Profile of Beverly Hills Tourism

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- 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

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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 #
Base: approached	**1379**	**1379**
Visitor(s)	56.9%	784
LA County Resident(s)	43.1%	595

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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	
Base:	**757**	**253**	**252**	**252**	**58**	**186**	**473**	**597**	**142**	**18**	**178**
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%

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

- **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.