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DESTINATION ANALYSTS

2013 HOLLYWOOD VISITOR PROFILE

ABBREVIATED REPORT – RELATIVE TO BOULEVARD ACTIVITY

Prepared by Destination Analysts on behalf of the Los Angeles Tourism & Convention Board

Project Overview

Methodology

This report presents the findings of a profile study of visitors to the Hollywood area of Los Angeles, conducted by Destination Analysts on behalf of the Los Angeles Tourism & Convention Board.

The study results presented herein are based on an intercept survey of visitors to Hollywood conducted at seventeen locations throughout the area. Data collection commenced in August 2013 and continued through November 2013. Destination Analysts' survey team fielded the survey on both weekdays and weekends, covering the hours of 10:00am to 10:00pm. The survey was administered in English. In total, 1,012 fully completed surveys were collected.

In order to qualify as a Hollywood "visitor" and thus complete the survey, respondents must reside outside of Hollywood and must have been in the Hollywood area for non-routine work purposes. Hollywood visitors were also asked what time they arrived. Those who were intercepted at the beginning of their visit to Hollywood were not interviewed.



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Pictured: Destination Analysts research staff interviews a Hollywood visitor at TCL Chinese Theatre.

Estimate of Hollywood Visits



Using data from two visitor profiles studies commissioned by Los Angeles Tourism and Convention Board (*Los Angeles 2013 Active Leisure Visitor Profile* and the *2013 Hollywood Visitor Profile*), estimates were made of the number of annual unique visitors and total number of annual visits to Hollywood.

Annual Visitation	# of Unique Visitors	Avg. # of Visits	# of Visits
Hollywood hotel guests	655,000	4.1	2,685,000
Overnight visitors (excl. Hollywood hotel guests)	3,713,000	1.8	6,684,000
Day visitors	<u>1,767,000</u>	<u>1.4</u>	<u>2,546,000</u>
Total	6,135,000	1.9	11,915,000

Visitor Place of Residence	# of Unique Visitors	% of Total
Los Angeles County	1,263,000	20.6%
Other SoCal	827,000	13.5%
Other US	1,747,000	28.5%
International	<u>2,298,000</u>	<u>37.5%</u>
Total	6,135,000	100%

- Hollywood "visitor" does not include those working or living in Hollywood but does include other Los Angeles County residents and those visiting Los Angeles from outside of Los Angeles County.



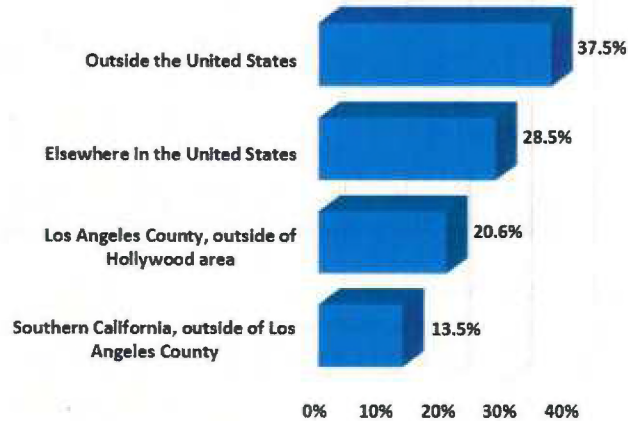
Visitor Place of Residence

In total, nearly 80 percent of visitors to Hollywood live outside Los Angeles County, including 37.5 percent who are international visitors.

Among non-local visitors, the percent of International visitors is almost half (47%) clearly showing that Hollywood is a key factor in attracting International visitors to Los Angeles.

Chart 1A: Residence

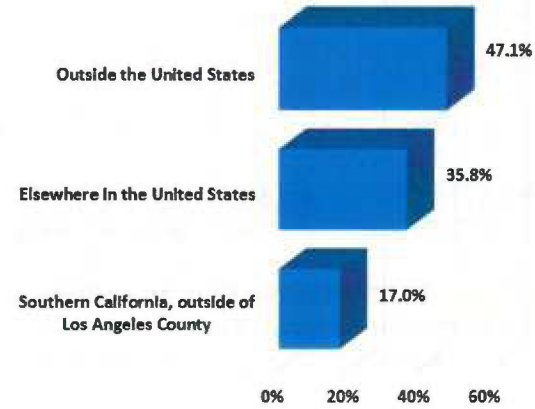
Question: Which of the following best describes where you live?



(Base: All respondents. 1,012 completed surveys.)

Chart 1B: Residence (Non-Local Visitors)

Question: Which of the following best describes where you live?



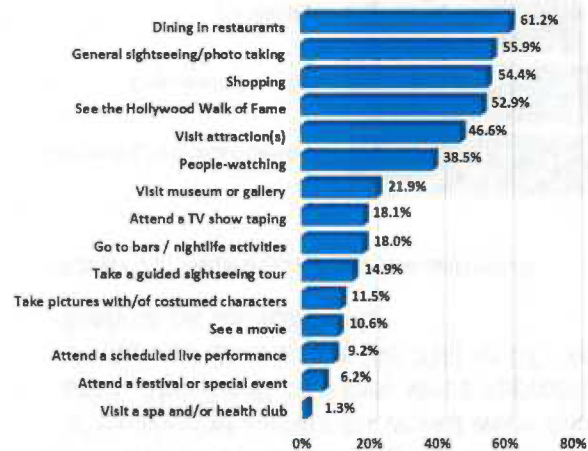
(Base: All respondents not in LA County. 804 completed surveys.)

Activities in Hollywood



Dining in restaurants (61.2%), Sightseeing (55.9%), Shopping (54.4%) and the Hollywood Walk of Fame (52.9%) are the most popular activities, particularly among Other Domestic and International visitors and those staying in Hotel/Motel and Private Residences .

Chart 17: Activities in Hollywood



(Base: All respondents. 1,012 completed surveys.)

	Los Angeles County	Southern California	Other Domestic	International	Hotel / Motel	Private Residence	Day Trip
Dining in restaurants	52.9%	61.3%	67.0%	61.2%	64.1%	55.7%	58.3%
General sightseeing /photo taking	27.4%	42.3%	60.4%	73.1%	69.9%	61.5%	51.4%
Shopping	40.9%	49.6%	56.3%	62.3%	62.6%	51.6%	49.1%
See the Hollywood Walk of Fame	23.6%	35.8%	59.7%	69.9%	66.0%	59.0%	47.7%
Visit attraction(s)	19.2%	32.1%	48.3%	65.7%	60.1%	42.6%	37.0%
People-watching	36.5%	38.0%	41.0%	38.0%	39.7%	30.3%	33.3%
Visit museum or gallery	12.5%	19.0%	22.9%	27.4%	28.6%	23.8%	19.4%
Attend a TV show taping	23.1%	19.0%	27.1%	8.2%	15.2%	15.6%	17.6%
Go to bars / nightlife activities	13.5%	20.4%	17.7%	19.8%	19.8%	10.7%	13.9%
Take a guided sightseeing tour	1.0%	5.8%	17.0%	24.3%	23.4%	13.9%	10.2%
Take pictures with/of costumed characters	3.4%	9.5%	13.5%	15.0%	14.2%	18.0%	13.9%
See a movie	13.0%	12.4%	7.6%	10.8%	10.6%	4.1%	7.9%
Attend a scheduled live performance	10.6%	12.4%	10.4%	6.3%	7.5%	6.6%	7.9%
Attend a festival or special event	9.6%	9.5%	4.5%	4.5%	5.8%	1.6%	4.2%
Visit a spa and/or health club	0.5%	1.5%	1.7%	1.3%	1.5%	0.8%	1.4%
Source Size	200	157	188	179	176	121	118

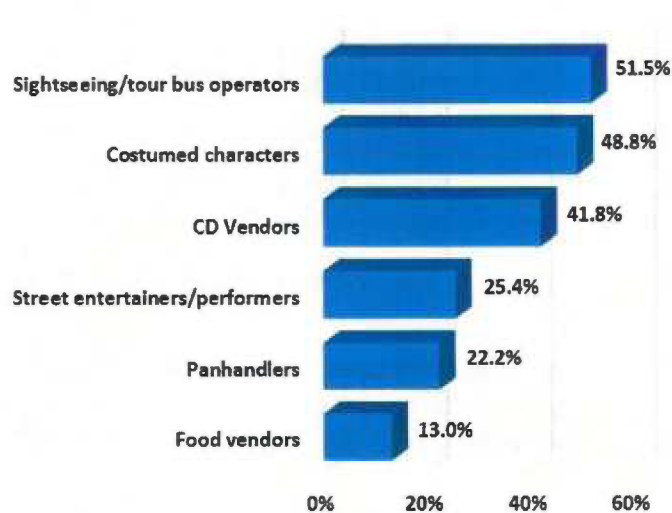
Question: Please look at this list of activities. Which of these have you—or will you—participate in while visiting Hollywood? (Select all that apply)

Approached on the Sidewalk



Visitors were asked if they were approached on the sidewalk by any solicitors. In total, 74 percent of Hollywood visitors surveyed were approached by one or more solicitors during their time in the area. About half said they were approached by Sightseeing or Tour Bus Operators (51.5%), Costumed Characters (48.8%) or CD Vendors (41.8 percent). International visitors are the most likely to be approached.

Chart 29: Approached on the Sidewalk



(Base: All respondents. 1,012 completed surveys.)

	Los Angeles County	Southern California	Other Domestic	International
Sightseeing/tour bus operators	31.7%	48.2%	51.4%	63.6%
Costumed characters	38.0%	45.3%	49.3%	55.7%
CD Vendors	33.2%	35.8%	38.5%	51.2%
Street entertainers /performers	19.7%	24.8%	25.0%	29.0%
Panhandlers	21.2%	18.2%	22.6%	24.0%
Food vendors	8.7%	15.3%	15.3%	12.9%
Total Percent Approached	63.0%	69.0%	74.0%	82.0%
Sample Size	208	137	285	379

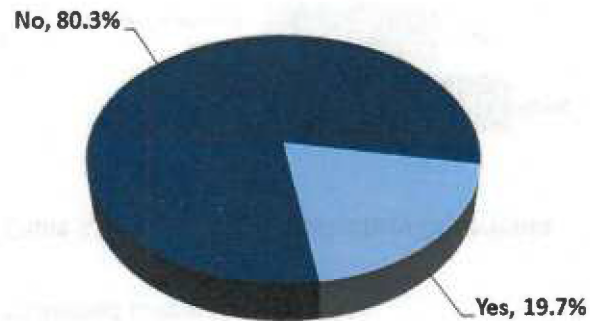
Question: Have you been approached on the sidewalks in Hollywood today by any of the following?



Unsatisfactory Experience

One in five Hollywood visitors who were approached on the sidewalk by solicitors reports that the experience was unsatisfactory (19.7%). Local residents are the most likely to have had an unsatisfactory experience at 30.3%.

Chart 30: Unsatisfactory Experience



	Los Angeles County	Southern California	Other Domestic	International
Yes	30.3%	14.7%	17.8%	17.9%
No	69.7%	85.3%	82.2%	82.1%
Sample Size	132	95	213	311

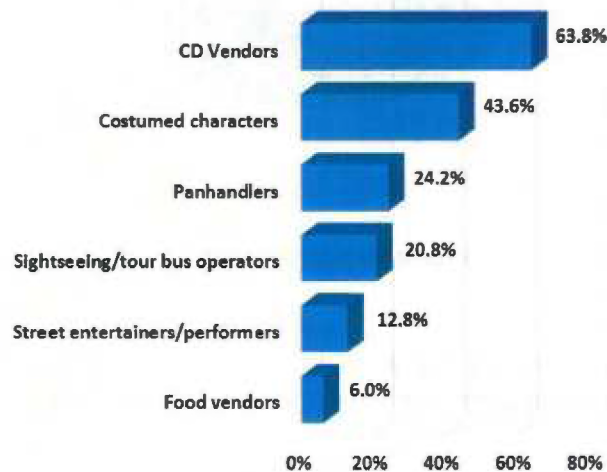
Questions: Did you have an unsatisfactory experience when approached?

(Base: Respondents who were approached on the sidewalk. 752 completed surveys.)

Cause of Unsatisfactory Experience

Visitors who had an unsatisfactory experience with a solicitor were asked to report with whom they had an unsatisfactory experience. These negative experiences are primarily with CD vendors (63.8%) and costumed characters (43.6%).

Chart 31: Cause of Unsatisfactory Experience



	Los Angeles County	Southern California	Other Domestic	International
CD Vendors	65.0%	28.6%	65.8%	69.6%
Costumed characters	50.0%	35.7%	42.1%	42.9%
Panhandlers	27.5%	28.6%	23.7%	21.4%
Sightseeing/tour bus operators	17.5%	14.3%	18.4%	26.8%
Street entertainers/performers	15.0%	0.0%	13.2%	14.3%
Food vendors	5.0%	7.1%	5.3%	7.1%
Sample Size	40	14	39	55

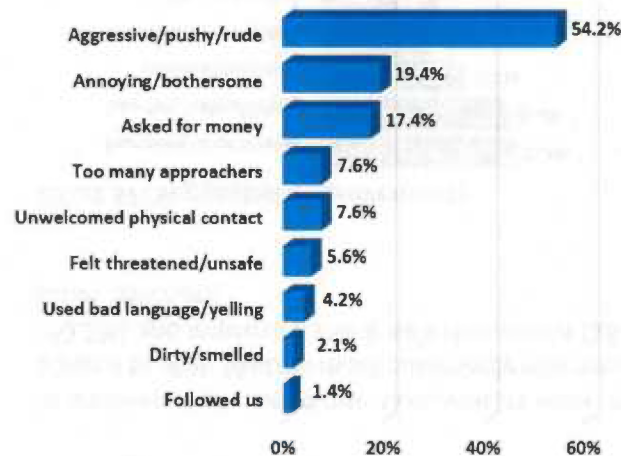
Questions: Which did you have unsatisfactory experiences with?

(Base: Respondents who were approached on the sidewalk and had an unsatisfactory experience. 149 completed surveys.)

Description of Unsatisfactory Experience

In an open-ended question, visitors who had an unsatisfactory experience with a solicitor were asked to describe the experience. Over half described the experience as “aggressive” or “rude” (54.2%). About one in five described the experience as “annoying” (19.4%) or one in which they were asked for money (17.4%).

Chart 32: Description of Unsatisfactory Experience



	Los Angeles County	Southern California	Other Domestic	International
Aggressive/pushy/rude	43.2%	33.3%	64.9%	58.6%
Annoying/bothersome	24.3%	33.3%	16.2%	15.5%
Asked for money	13.5%	0.0%	18.9%	22.4%
Too many approachers	10.8%	8.3%	8.1%	5.2%
Unwelcomed physical	8.1%	8.3%	13.5%	3.4%
Felt threatened/unsafe	13.5%	8.3%	5.4%	0.0%
Used bad language/yelling	2.7%	8.3%	0.0%	6.9%
Dirty/smelled	0.0%	8.3%	0.0%	3.4%
Followed us	0.0%	0.0%	0.0%	3.4%
Sample Size	17	12	17	58

Questions: Please describe your experience.

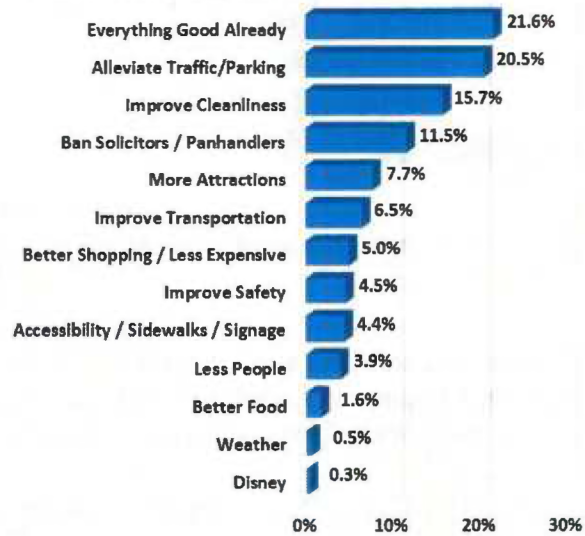
(Base: Respondents who were approached on the sidewalk and had an unsatisfactory experience. 144 completed surveys.)

Suggested Improvements



In another open-ended question, visitors were asked the single change that would improve Hollywood as a place to visit. Visitors most commonly recommended alleviating Hollywood’s traffic and lack of parking (20.5%) and improving the area’s cleanliness (15.7%). 11.5 percent suggested a ban on panhandlers and other solicitors.

Chart 37: Suggested Improvements



(Base: All respondents. 928 completed surveys.)

	Los Angeles County	Southern California	Other Domestic	International
Everything Good Already	15.0%	13.4%	22.5%	27.4%
Alleviate Traffic/Parking	23.8%	23.6%	24.0%	14.9%
Improve Cleanliness	23.8%	22.0%	13.6%	10.6%
Ban Solicitors / Panhandlers	16.1%	7.1%	13.2%	9.4%
More Attractions	5.2%	9.4%	7.4%	8.6%
Improve Transportation	2.6%	3.9%	5.0%	10.6%
Better Shopping / Less Expensive	3.6%	3.1%	5.4%	6.0%
Improve Safety	7.8%	7.1%	1.6%	4.0%
Accessibility / Sidewalks / Signage	3.1%	7.1%	2.3%	5.7%
Less People	3.1%	7.9%	3.5%	3.1%
Better Food	0.5%	0.0%	2.7%	2.0%
Weather	0.0%	0.0%	1.2%	0.6%
Disney	0.0%	0.0%	0.0%	0.9%
Sample Size	100	117	258	350

Question: If you could change one thing to make Hollywood a better place to visit, what change would you make?