

2018 Santa Monica Tourism Economic & Fiscal Impacts and Visitor Profile Summary

Summary: Santa Monica Travel & Tourism has tracked tourism since 1983. For the year 2018, Santa Monica’s vital travel industry was strong with record levels for hotel guest volume and total spending, as well as for total lodging and retail sales taxes. However, total visitor volume of 8.4 million was 3.6% lower than 8.7 million in 2017. With average visitor length of stay of 1.37 days versus 1.36 in 2017, and the lower volume, visitor days dipped -2.9% to 11.51 million from 11.85 million last year. Total annual spending of \$1.93 billion versus \$1.96 billion in 2017, was off 1.4% mainly due to fewer day visitors and guests in unpaid lodging, and *their* lower average daily spending. Of note, visitors generated 7.8% more in lodging tax and 19% more in retail sales tax but spending in some categories was lower than last year, paralleling overall City sales/tax data. Visitors supported fewer tourism jobs 12,600, versus 13,300 in 2017. Thus, while Santa Monica tourism remains solid, some weakness and shifts were evident.

1. OVERALL SANTA MONICA VISITOR ACTIVITY INDICATORS (2018 VS. 2017)

Indicator	2018		2017
	Number	% Change	
Total Number of Visitors ¹	8,399,000	-3.6%	8,710,500
Average Length of Stay (days, all visitors)	1.37	.7%	1.36
Total Visitor Days	11,511,600	-2.9	11,853,000
Total Annual Visitor Spending	\$1.93 billion	-1.4%	\$1.96 billion
Per-capita Daily Visitor Spending	\$168	1.2%	\$166
Hotel Tax Revenue to City (from non-local visitors) ²	\$58,597,400	7.8%	\$54,353,700
Visitor Retail Sales Tax Revenue to City ²	\$14,487,400	19.0%	\$12,176,800
Santa Monica Jobs Supported by Tourism	12,573	-5.8%	13,345

Source: Lauren Schlau Consulting and CIC Research, Inc. for Santa Monica Travel & Tourism

2. TOTAL ANNUAL VISITOR SPENDING IN SANTA MONICA BY CATEGORY (2018 VS. 2017)

Indicator	2018		% Change	2017	
	Spending	Ratio	2018/2017	Spending	Ratio
Lodging	\$ 506,223,688	9.8%	9.8%	\$ 460,876,122	23.5%
Meals	\$ 325,638,180	-6.1%	-5.5%	\$ 346,792,799	17.7%
Beverages	\$ 151,010,681	-20.4%	-19.5%	\$ 189,713,552	9.7%
Shopping/gifts	\$ 790,231,531	-0.2%	-0.1%	\$ 792,030,480	40.3%
Admissions fees	\$ 29,580,355	35.3%	35.8%	\$ 21,856,637	1.1%
Activities	\$ 19,661,285	-19.0%	-18.5%	\$ 24,260,372	1.2%
Local transportation/parking	\$ 41,985,673	-14.3%	-13.9%	\$ 48,984,433	2.5%
Spa/beauty/health club	\$ 22,945,460	-40.3%	-39.8%	\$ 38,438,050	2.0%
Groceries/other items	\$ 47,641,968	18.8%	19.1%	\$ 40,094,274	2.0%
Total	\$ 1,934,918,821	-1.4%	-1.2%	\$ 1,963,046,718	100.0%

Source: Lauren Schlau Consulting and CIC Research, Inc. for Santa Monica Travel & Tourism

3. SANTA MONICA VISITOR VOLUME & ECONOMIC IMPACT BY SEGMENT (2018)

Visitor Segment	Annual Visitors	Ratio	% Chg. (prior)	Avg. Stay (days)	Annual Visitor Spending	Ratio	% Chg (prior)	Daily Avg. Spend per-person	% Chg (prior)
Hotel/motel	843,751	10.0%	8.0%	2.97	\$ 986,777,433	51.1%	2.3%	\$ 393.90	-5%
Unpaid/private lodging	173,602	2.1%	-3.0%	4.40	\$ 81,528,299	4.2%	3.8%	\$ 106.82	12.7%
Other paid lodging	175,858	2.1%	-6.8%	5.90	\$ 198,894,400	10.3%	-5.7%	\$ 191.71	-6.8%
Day Visitors	7,205,760	85.8%	-4.7%	1.00	\$ 667,718,689	34.4%	-5.8%	\$ 92.66	-1.2%
International	4,354,000	51.8%	9.9%	3.82	\$1,139,713,800	58.9%	10.3%	\$ 178.69	4.9%
U.S. Domestic	4,045,000	48.2%	-9.0%	3.29	\$ 795,205,100	41.1%	-14.4%	\$ 154.91	-3.6%

Source: Lauren Schlau Consulting and CIC Research, Inc. for Santa Monica Travel & Tourism

¹ A visitor is someone who resides *outside* of Los Angeles County, in Santa Monica for the day or overnight, for leisure, business, a meeting, special event or other temporary purpose except regular work or to attend school.

² Lodging and Sales tax based on estimated direct taxable visitor spending; may vary from City reported lodging and sales tax revenue.

4. SUMMARY - SANTA MONICA VISITOR PROFILE (2018 vs.2017)³

Characteristic	2018	2017
% International Visitor	52%	51%
% U.S. Resident visitor (excl. California)	33%	35%
% California resident	16%	14%
% First-Time Visitor/Repeat Visitor (past three years)	54% / 46%	57%/43%
Avg. number past visits in past 3 years by repeat visitors	2.5	2.2
% Mainly visiting Santa Monica for pleasure/vacation	59%	62%
Santa Monica <i>main</i> destination of this trip	15%	14%
% Day Visitor / % Overnight Visitors in Santa Monica	86% / 14%	87% / 13%
% Staying in a Santa Monica hotel: all Visitors/of overnight visitors	10% / 70%	9% / 68%
% of all International visitors staying overnight in a Santa Monica hotel	12%	10%
% of all U.S. (excl. Cal) visitors staying in Santa Monica hotel	9%	9%
Average stay in Santa Monica - all overnight visitors (nights)	3.6	3.7
Avg. stay in Santa Monica - all hotel guests (nights)	3.0	3.1
Avg. stay in Santa Monica – other paid and unpaid lodging guests (nights)	5.9	5.4
Average travel group size (persons)	2.7	3.0
Average daily per-person spending in Santa Monica (all visitors)	\$168	\$166
Median annual household income	\$91,700	\$97,900
Equivalent Taxes per Santa Monica Household from Visitor Spending	\$1,540	\$1,379

Source: Lauren Schlau Consulting and CIC Research, Inc. for Santa Monica Travel & Tourism

5. VISITOR ORIGIN – SANTA MONICA’S TOP U.S. & INTERNATIONAL FEEDER MARKETS 2018

Top U.S. Feeder Markets (>2%)		Top International Feeder Markets (>2.5%)	
(share of U.S.)	Share	(share of Int'l.)	Share
California	32.6%	Mexico	11.3%
Arizona	4.9%	Australia/New Zealand	9.2%
New York	4.8%	England	7.3%
Texas	4.7%	Asia Pacific	6.1%
Florida	3.6%	Germany	5.8%
Oregon	3.6%	Scandinavia	5.4%
Nevada	3.4%	Western Canada	5.3%
Georgia	2.8%	Eastern Canada	4.4%
Utah	2.5%	France	3.6%
Massachusetts	2.5%	China-Hong Kong	3.4%
Colorado	2.5%	Italy	3.1%
Illinois	2.2%	Other Nor./Central America	3.0%
Wisconsin	2.1%	Other Middle East	2.8%
Washington	2.0%	Japan	2.8%

Source: Lauren Schlau Consulting and CIC Research, Inc. for Santa Monica Travel & Tourism

³ Profile data based on 1,493 on-site interviews (+/-375 quarterly) during 2018 among defined Santa Monica visitors. When quoting these data, attribution to Lauren Schlau Consulting and CIC Research Inc. for Santa Monica Travel & Tourism 04/2019