

2019 Santa Monica Tourism Economic & Fiscal Impacts and Visitor Profile Summary

Summary: Santa Monica Travel & Tourism has tracked tourism since 1983. For calendar year 2019, Santa Monica’s vital travel industry was strong but most indicators slipped from what were record levels in 2017 & 2018. Overall 2019 visitor volume rose by just .2% from 2018, mainly due to more other paid (non-hotel) lodging guests. With the same 1.37 average days stay, coupled with the weak rise in volume, visitor days ticked up but .1% from last year. With a 2.4% drop in daily per-capita spending mainly due to softer retail sales, and the static visitor volume, 2019 total spending was \$1.89 billion versus \$1.93 billion in 2018, a 2.2% dip. These decreases impacted lodging and retail taxes; hotel tax slipped .5% and retail taxes fell 4%. As a result, visitor spending supported fewer tourism jobs, 12,010 in 2019 versus 12,600 in 2018. Of note, international volume, 51% of total visitation, fell by .6% but they spent 3% more at 62% of total spending in 2019. Thus, while Santa Monica tourism remains solid, some weakness and shifts were evident.

1. OVERALL SANTA MONICA VISITOR ACTIVITY INDICATORS (2019 VS. 2018)

Indicator	2019		2018	2017
	Number	% Change		
Total Number of Visitors ¹	8,413,100	.2%	8,399,000	8,710,500
Average Length of Stay (days, all visitors)	1.37	-	1.37	1.36
Total Visitor Days	11,528,200	.1%	11,511,600	11,853,000
Total Annual Visitor Spending	\$1.89 billion	-2.2%	\$1.93 billion	\$1.96 billion
Per-capita Daily Visitor Spending	\$164	-2.4%	\$168	\$166
Hotel Tax Revenue to City (from non-local visitors) ²	\$58,315,740	-5%	\$58,597,400	\$54,353,700
Visitor Retail Sales Tax Revenue to City ²	\$13,875,500	-4.2%	\$14,487,400	\$12,176,800
Santa Monica Jobs Supported by Tourism	12,010	-4.4%	12,573	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 (2019 VS. 2018)

Indicator	2019		% Change 2019/2018	2018	
	Spending	Ratio		Spending	Ratio
Lodging	\$ 506,791,398	26.8%	0.1%	\$ 506,223,688	9.8%
Meals	\$ 343,357,493	18.1%	5.4%	\$ 325,638,180	-6.1%
Beverages	\$ 146,175,194	7.7%	-3.2%	\$ 151,010,681	-20.4%
Shopping/gifts	\$ 724,154,650	38.3%	-8.4%	\$ 790,231,531	-0.2%
Admissions fees	\$ 29,390,845	1.6%	-0.6%	\$ 29,580,355	35.3%
Activities	\$ 22,743,153	1.2%	15.7%	\$ 19,661,285	-19.0%
Local transportation/parking	\$ 44,071,023	2.3%	5.0%	\$ 41,985,673	-14.3%
Spa/beauty/health club	\$ 35,090,906	1.9%	52.9%	\$ 22,945,460	-40.3%
Groceries/other items	\$ 40,071,223	2.1%	-15.9%	\$ 47,641,968	18.8%
Total	\$ 1,891,845,886	100.0%	-2.2%	\$ 1,934,918,821	-1.4%

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

3. SANTA MONICA VISITOR VOLUME & ECONOMIC IMPACT BY SEGMENT (2019)

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	827,868	9.8%	-1.2%	2.81	\$ 960,157,737	50.8%	-2.7%	\$ 413.19	4.9%
Unpaid/private lodging	178,642	2.1%	2.9%	4.76	\$ 88,744,286	4.7%	8.9%	\$ 104.28	-2.4%
Other paid lodging	190,973	2.3%	8.6%	5.96	\$ 214,118,399	11.3%	7.7%	\$ 188.19	-1.8%
Day Visitors	7,215,651	85.8%	.1%	1.00	\$ 628,825,465	33.2%	-5.8%	\$ 87.15	-5.9%
International	4,327,596	51.4%	-.6%	1.45	\$ 1,174,655,388	62.1%	3.1%	\$271.43	3.4%
U.S. Domestic	4,085,538	48.6%	1.0%	1.29	\$ 717,190,486	37.9%	-9.8%	\$175.54	-10.7%

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 (2019 vs.2018)³

Characteristic	2019	2018
% International Visitor	51%	52%
% U.S. Resident visitor (excl. California)	30%	33%
% California resident	19%	16%
% First-Time Visitor/Repeat Visitor (past three years)	53% / 47%	54% / 46%
Avg. number past visits in past 3 years by repeat visitors	2.4	2.5
% Mainly visiting Santa Monica for pleasure/vacation	56%	59%
Santa Monica <i>main</i> destination of this trip	16%	15%
% Day Visitor / % Overnight Visitors in Santa Monica	86% /14%	86% / 14%
% Staying in a Santa Monica hotel: all Visitors/of overnight visitors	10% / 69%	10% / 70%
% of all International visitors staying overnight in a Santa Monica hotel	12%	12%
% 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	3.6
Avg. stay in Santa Monica - all hotel guests (nights)	2.8	3.0
Avg. stay in Santa Monica – other paid lodging guests (nights)	6.0	5.9
Average travel group size (persons)	2.5	2.7
Average daily per-person spending in Santa Monica (all visitors)	\$164	\$168
Median annual household income	\$96,500	\$91,700
Equivalent Taxes per Santa Monica Household from Visitor Spending	\$1,496	\$1,540

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 2019

Top 10 U.S. Feeder Markets		Top International Feeder Markets (>2.5%)	
(share of U.S.)	Share	(share of Int'l.)	Share
California	38.6%	England	8.1%
New York	5.5%	Australia/New Zealand	7.8%
Arizona	4.9%	Western Canada	6.6%
Nevada	4.7%	Scandinavia	6.4%
Florida	3.6%	Mexico	6.3%
Oregon	3.5%	Germany	5.7%
Texas	3.3%	Japan	4.5%
Washington	2.6%	Asia Pacific	4.4%
Virginia	2.5%	Other Nor./Cntl. America	4.2%
Utah	2.3%	Eastern Canada	4.1%
Top 10 States	71.5%	Italy	4.1%
		France	2.9%
		Spain	2.8%
		Africa	2.8%

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

³ Profile data based on 1,427 on-site interviews (+/-356 quarterly) during 2019 among defined Santa Monica visitors. When quoting these data, attribution to: Lauren Schlau Consulting and CIC Research Inc. for Santa Monica Travel & Tourism 05/2020