

2020 Santa Monica Tourism Economic & Fiscal Impacts and Visitor Profile Summary

Summary: Santa Monica Travel & Tourism has tracked tourism since 1983. In 2020, Santa Monica's vital travel industry suffered - along with almost everywhere else - the impacts of the unprecedented COVID-19 pandemic. The steep declines in 2020 were especially stark coming off record years of 2018 and 2019. Overall, 2020 visitor volume of 2.0 million fell by 76% from 2019. Average stay rose slightly to 1.5 from 1.4 days, but total visitor days was still off by 73%. With daily per-capita spend down by 10%, and the anemic visitor volume, 2020 visitor spending totaled \$453 million, off by 76% from \$1.89 billion in 2019. These decreases impacted visitor supported taxes; lodging tax slipped 68% and visitor retail taxes fell by 78%. Thus, visitor spending supported just 3,100 local jobs in 2020 versus 12,010 in 2019. Of note, international and domestic volume changed places, with domestic share rising to 75% and International at 25% of total Santa Monica visitation and 29% of total spending. Thus, Santa Monica tourism took a great hit in 2020, yet is expected to rebuild in 2021 and beyond once restrictions are lifted and consumers are confident that they can travel safely.

1. OVERALL SANTA MONICA VISITOR ACTIVITY INDICATORS (2020 VS. 2019)

Indicator	2020		2019	2018
	Number	% Change		
Total Number of Visitors	2,031,100	-75.9%	8,413,100	8,399,000
Average Length of Stay (days, all visitors)	1.52	11.0%	1.37	1.37
Total Visitor Days	3,079,900	-73.3%	11,528,200	11,511,600
Total Annual Visitor Spending	\$453,820,900	-76.0%	\$1.89 billion	\$1.93 billion
Per-capita Daily Visitor Spending	\$147	-10.4%	\$164	\$168
Hotel Tax Revenue to City (from non-local visitors) ¹	\$18,698,400	-67.9%	\$58,315,740	\$58,597,400
Visitor Retail Sales Tax Revenue to City ¹	\$3,090,100	-77.7%	\$13,875,500	\$14,487,400
Equivalent tax per SM household from visitor spend	\$453	-69.7%	\$1,496	\$1,540
Santa Monica Jobs Supported by Tourism	3,095	-74.2%	12,010	12,573

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

2. TOTAL ANNUAL VISITOR SPENDING IN SANTA MONICA BY CATEGORY (2020 VS. 2019)

Indicator	2020		% Change	2019	
	Total Spending	Ratio	2020/2019	Spending	Ratio
Lodging	\$ 154,355,273	34.0%	-69.5%	\$ 506,791,398	26.8%
Meals	\$ 122,576,428	27.0%	-64.3%	\$ 343,357,493	18.1%
Beverages	\$ 30,406,969	6.7%	-79.2%	\$ 146,175,194	7.7%
Shopping/gifts	\$ 126,193,246	27.8%	-82.6%	\$ 724,154,650	38.3%
Admissions fees	\$ 3,371,929	0.7%	-88.5%	\$ 29,390,845	1.6%
Activities	\$ 4,675,782	1.0%	-79.4%	\$ 22,743,153	1.2%
Local transportation/parking/etc.	\$ 6,096,285	1.3%	-86.2%	\$ 44,071,023	2.3%
Spa/beauty/health club	\$ 117,822	0.0%	-99.7%	\$ 35,090,906	1.9%
Groceries/other items	\$ 6,027,183	1.3%	-85.0%	\$ 40,071,223	2.1%
Total	\$ 453,820,918	100.0%	-76.0%	\$ 1,891,845,886	100.0%

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

3. SANTA MONICA VISITOR VOLUME & ECONOMIC IMPACT BY SEGMENT (2020 only)

Visitor Segment	Annual Visitors	Ratio	% Chg. Vis. (prior)	Avg. Stay (days)	Annual Visitor Spending	Ratio	% Chg. Spend. (prior)	Daily Avg. Spend per-person	% Chg (prior)
Hotel/motel	478,769	23.6%	-42.2%	2.51	\$ 289,542,599	63.8%	-69.8%	\$ 241.40	-41.6%
Unpaid/private lodging	29,643	1.5%	-83.4%	4.78	\$ 9,929,824	2.2%	-88.9%	\$ 70.02	-32.7%
Other paid lodging	71,564	3.5%	-62.5%	4.02	\$ 30,081,709	6.6%	-85.9%	\$ 104.61	-44.1%
Day Visitors	1,451,150	71.4%	-79.9%	1.00	\$ 124,266,786	27.4%	-80.2%	\$ 85.63	-1.1%
International	504,987	24.9%	-88.3%	1.75	\$ 133,616,830	29.4%	-88.6%	\$ 151	-44.3%
U.S. Domestic	1,526,139	75.1%	-62.6%	1.44	\$ 320,204,063	70.6%	-55.3%	\$ 146	-18.0%

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

¹ Lodging and Sales tax based on estimated direct taxable visitor spending; may vary from City reported lodging and sales tax revenue.

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4. SUMMARY - SANTA MONICA VISITOR PROFILE (2020 vs.2019) ^{1, 2}

Characteristic	2020	2019
% International Visitor	24.9%	51%
% U.S. Resident visitor (excl. California)	42.6%	30%
% California resident	32.6%	19%
% First-Time Visitor/Repeat Visitor (past three years)	42% / 58%	53% / 47%
Avg. number past visits in past 3 years by repeat visitors (excl this trip)	2.5	2.4
% Mainly visiting Santa Monica for pleasure/vacation	42%	56%
Santa Monica <i>main</i> destination of this trip	30%	16%
Arrived in Southern California by commercial air	47%	68%
% Day Visitor / % Overnight Visitors in Santa Monica	71% / 29%	86% / 14%
% Staying in a Santa Monica hotel: all Visitors/of overnight visitors	24% / 83%	10% / 69%
% of all International visitors staying overnight in a Santa Monica hotel	18%	12%
% of all U.S. (excl. Cal) visitors staying in Santa Monica hotel	32%	9%
Average stay in Santa Monica - all overnight visitors (nights)	2.8	3.6
Avg. stay in Santa Monica - all hotel guests (nights)	2.5	2.8
Avg. stay in Santa Monica – other paid lodging guests (nights)	4.2	6.0
Average travel group size (persons)	2.5	2.5
Average daily per-person spending in Santa Monica (all visitors)	\$147	\$164
Median annual household income	\$76,000	\$96,500
Equivalent Taxes per Santa Monica Household from Visitor Spending	\$453	\$1,496

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 2020

Top 10 U.S. Feeder Markets		Top International Feeder Markets (>2.5%)	
(share of U.S.)	Share	(share of Int'l.)	Share
California	43.3%	Australia/New Zealand	14.9%
Arizona	5.7%	England	10.5%
Nevada	5.6%	Western Canada	8.7%
Texas	4.2%	Mexico	8.1%
Washington	3.9%	Other Nor./Central America	7.3%
Florida	3.2%	Eastern Canada	4.5%
Indiana	3.1%	Germany	4.5%
New York	2.8%	Israel	3.9%
Colorado	2.7%	Scandinavia	3.5%
Ohio	1.9%	Spain	3.1%
Top 10	76.4%	Argentina	2.8%
		Chile	2.5%
		Switzerland	2.5%

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 Profile data based on 480 on-site interviews during Winter and Fall 2020 among Santa Monica visitors as defined above.