

2021 Santa Monica Tourism Economic & Fiscal Impacts and Visitor Profile Summary

Summary: Santa Monica Travel & Tourism has tracked tourism since 1984. In 2021, Santa Monica’s vital travel industry began to emerge from the devastating impacts of the COVID-19 pandemic. In 2021 Santa Monica tourism began to recover from 2020, yet still below 2018 and 2019 peaks. Overall, 2021 visitor volume of 3.5 million rose by 73% from 2.0 million in 2020. Average stay dipped slightly to 1.45 from 1.52 days last year, yet total visitor days grew by 65% to nearly 5.1 million versus 3.1 million in 2020. While daily per-capita spend was essentially flat, the rise in visitor days fueled a 65% surge in 2021 total visitor spending to \$750 million, up from \$453 million in 2020. The higher spending also drove visitor taxes; lodging tax spiked by 124% to \$42 million, while visitor retail taxes grew by 21% to \$3.7 million. Visitor spending supported 5,747 local jobs, up 86% over 3,100 jobs in 2020. Of note, international volume still lagged, reaching only 9% of total 2021 visitor volume and 10% of total visitor spending. Thus, Santa Monica tourism showed signs of recovery, but lacking significant international and business visitation, is slower - but will be steady, if COVID stays contained, countries open for out-bound tourism and consumers trust that they can travel safely.

1. OVERALL 2021 SANTA MONICA VISITOR ACTIVITY INDICATORS (VS. 2020 & 2019)

Indicator	2021		2020	2019
	Number	% Change		
Total Number of Visitors	3,504,048	72.5%	2,031,100	8,413,100
Average Length of Stay (days, all visitors)	1.45	-4.7%	1.52	1.37
Total Visitor Days	5,071,296	64.7%	3,079,900	11,528,200
Total Annual Visitor Spending	\$750,259,292	65.3%	\$453,820,900	\$1.89 billion
Per-capita Daily Visitor Spending	\$148	.7%	\$147	\$164
Hotel Tax Revenue to City (from non-local visitors) ¹	\$41,927,620	124.2%	\$18,698,400	\$58,315,740
Visitor Retail Sales Tax Revenue to City ¹	\$3,730,376	20.7%	\$3,090,100	\$13,875,500
Equivalent tax per SM household from visitor spend	\$937	106.8%	\$453	\$1,496
Santa Monica Jobs Supported by Tourism	5,747	85.7%	3,095	12,010

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

2. ANNUAL 2021 VISITOR SPENDING IN SANTA MONICA IN TOTAL & BY CATEGORY (vs. 2020)

Indicator	2021		% Change	2020	
	Total Spending	Ratio	2021/2020	Spending	Ratio
Lodging	\$ 350,094,364	46.7%	126.8%	\$ 154,355,273	34.0%
Meals	\$ 159,898,815	21.3%	30.4%	\$ 122,576,428	27.0%
Beverages	\$ 61,976,016	8.3%	103.8%	\$ 30,406,969	6.7%
Shopping/gifts	\$ 114,304,643	15.2%	-9.4%	\$ 126,193,246	27.8%
Admissions fees	\$ 21,786,186	2.9%	546.1%	\$ 3,371,929	0.7%
Activities	\$ 16,825,754	2.2%	259.8%	\$ 4,675,782	1.0%
Local transportation/parking/etc.	\$ 9,525,666	1.3%	56.3%	\$ 6,096,285	1.3%
Spa/beauty/health club	\$ 10,263,539	1.4%	8611.0%	\$ 117,822	0.0%
Groceries/other items	\$ 5,584,310	0.7%	-7.3%	\$ 6,027,183	1.3%
Total	\$ 750,259,292	100.0%	65.3%	\$ 453,820,918	100.0%

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

3. SANTA MONICA – 2021 VISITOR VOLUME & ECONOMIC IMPACT BY SEGMENT

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	796,560	22.7%	66.4%	2.49	\$ 542,235,297	72.3%	87.3%	\$ 273.71	13.4%
Unpaid/private lodging	40,236	1.1%	95.4%	3.87	\$ 12,513,068	1.7%	106.3%	\$ 80.43	14.9%
Other paid lodging	157,495	4.5%	71.4%	2.70	\$ 70,037,635	9.3%	89.6%	\$ 164.82	57.6%
Day Visitors	2,509,758	71.6%	72.9%	1.00	\$ 125,473,292	16.7%	1.0%	\$ 49.99	-41.6%
International	322,787	9.2%	-36.1%	1.51	\$ 78,131,807	10.4%	-41.5%	\$160.12	6.0%
U.S. Domestic	3,181,261	90.8%	108.5%	1.44	\$672,127,236	89.6%	109.9%	\$146.46	.5%

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 – 2021 SANTA MONICA VISITOR PROFILE (vs. 2020 & 2019) ^{1, 2}

Characteristic	2021	2020	2019
% International Visitor	9.2%	24.9%	51%
% U.S. Resident visitor (excl. California)	60.8%	42.6%	30%
% California resident	30.0%	32.6%	19%
% First-Time Visitor/Repeat Visitor (past three years)	50.5% / 49.5%	42% / 58%	53% / 47%
Avg. number past visits in past 3 years by repeat visitors (excl this trip)	3.3	2.5	2.4
% Mainly visiting Santa Monica for pleasure/vacation	48%	42%	56%
Santa Monica <i>main</i> destination of this trip	31%	30%	16%
Arrived in Southern California by commercial air	34%	47%	68%
% Day Visitor / % Overnight Visitors in Santa Monica	72% / 28%	71% / 29%	86% / 14%
% Staying in a Santa Monica hotel: all Visitors/of overnight visitors	23% / 80%	24% / 83%	10% / 69%
% of all International visitors staying overnight in a Santa Monica hotel	22%	18%	12%
% of all U.S. (excl. Cal) visitors staying in Santa Monica hotel	25%	32%	9%
Average stay in Santa Monica - all overnight visitors (nights)	2.6	2.8	3.6
Avg. stay in Santa Monica - all hotel guests (nights)	2.5	2.5	2.8
Avg. stay in Santa Monica – other paid lodging guests (nights)	3.0	4.2	6.0
Average travel group size (persons)	3.5	2.5	2.5
Average daily per-person spending in Santa Monica (all visitors)	\$148	\$147	\$164
Median annual household income	\$81,400	\$76,000	\$96,500

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

5. VISITOR ORIGIN – SANTA MONICA 2021 TOP U.S. & INTERNATIONAL FEEDER MARKETS

Top 10 U.S. Feeder States		International Feeder Markets	
State	Share of U.S.	Country/Region	Share of Int'l.
California	33.0%	Mexico/Central Am.	28.3%
Texas	6.7%	Asia	20.6%
Nevada	5.8%	Eastern Canada	11.4%
New York	5.6%	Central/Eastern Europe	7.7%
Florida	4.7%	Middle East	7.2%
Illinois	4.0%	South America	6.8%
Washington	3.3%	Western Canada	5.1%
Arizona	2.8%	Western Europe	3.3%
Virginia	2.4%	Utd. Kingdom/Ireland	3.0%
Pennsylvania	2.3%	Australia/New Zealand	1.0%
Top 10 States	70.6%	Africa	1.0%
		Asia Pacific	1.0%
		Scandinavia	0.7%
		Other	2.8%

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 1,149 on-site interviews during four quarters of 2021 among Santa Monica visitors as defined above.

* When quoting these data, attribution to: Lauren Schlau Consulting and CIC Research Inc. for Santa Monica Travel & Tourism r04/2022