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Economic & Fiscal Impacts and Profile of 2016 Catalina Island Visitors Final Report



June 2017

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VISITOR RESEARCH SUPPORTS MARKETING & DESTINATION GOALS

- The Catalina Island Chamber of Commerce & Visitor Bureau (CICCVB) is a not-for-profit entity marketing Catalina Island to non-local visitors in order to build the destination brand and to strengthen its tourism economy, which supports local economic development goals.
- To support destination marketing and management, CICCVB conducted research to measure the economic and fiscal impacts of the island's visitation, and to obtain a current and comprehensive visitor profile, representing calendar year 2016.
- A total of 604 visitor groups were interviewed at various locations on Catalina Island; 202 in spring 2016, 202 in summer and 200 in fall.
- The study produces these main results for Catalina Island:
 - annual **visitor volume** and **visitor days**
 - annual total and per-capita **direct visitor spending** by category and by lodging segment
 - annual **fiscal (tax) impacts** generated by direct visitor spending
 - local **employment** supported by direct visitor spending
 - seasonal and annual **visitor profiles** of visitor trip behaviors and demographics
- Lauren Schlau Consulting, a tourism industry market research specialist, conducted the visitor study. CIC Research, Inc., produced the visitor volume, spending, tax and employment estimates using an econometric model with inputs derived from visitor collected survey data.

Summary of Findings

- Tourism Indicators
- Profile Summary

SUMMARY CATALINA ISLAND 2016

TOURISM IMPACT INDICATORS

- **Visitor Volume:** 910,800 annual visitors
- **Visitor Days:** 1.3 million, resulting from overall 1.44 days average stay on Catalina Island
- **Daily Per-person Spending:** All visitors \$127; Overnight visitors \$163
- **Annual Direct Visitor Spending:** \$166.7 million
- **Taxes:** \$5.8 million from direct spending, \$5.1 million in lodging tax and \$730,600 in retail sales tax to Avalon.
- **Jobs:** Visitor spending supported 1,254 jobs (FTE)

Table I - Summary Catalina Island Tourism Impacts

Indicator	2016
Annual Total Visitor Volume	910,773
Annual Total Visitor Days	1,314,574
Average Stay (days) All/Overnight	1.44/2.26
Per-capita Daily Spending: All/Overnight	\$127/\$163
Total Direct Visitor Spending (\$million)	\$166.7
Taxes generated: Lodging Tax (\$million)/Retail Sales tax	\$5.1/\$730,570
Total Jobs Supported by Tourism (spending)	1,254

Source for all tables and data: Lauren Schlaue Consulting and CIC Research Inc.

PROFILE SUMMARY — I

Overall 2016 Visitor – Summary Profile

Catalina Island visitors were mostly non-L A County Southern Californian couples or families with the adults in their mid- 40's. Despite their proximity, only 33% have visited the island in the last 3 years. For most this was their trip main destination; while most came for leisure/vacation, many came for a celebration. Nearly two-thirds were day visitors (staying about 6 hours). Of the one-third who stayed overnight 80% lodged in a hotel for about two nights. Nearly all spent money on the island, each visitor averaging \$127 here daily. About half identified as Caucasian, with 30% Hispanic/Latino. Overall, visitors reported \$87,000 median household income.

Residence

- 80% of Catalina Island annual visitors are Californians, and 70% reside in Southern California, of which 43% were from Southern California areas outside Los Angeles County with 27% from L A County.
- The rest of California accounted for 11%, with other U.S. states at 18%, and nearly 2% of International origin.

New vs. Repeat, Main Destination

- Only 30% of visitor groups had visited in the past 3 years, somewhat surprising given the island's proximity to its main feeder markets.
 - visitors who have been to the island, made an average of 5.5 trips here in the past three years.
- 66% named Catalina Island as their *main* trip destination.

PROFILE SUMMARY – 2

Information

- When planning the trip 98% used a resource, mainly the internet for Catalina Island information. Once here, visitors mainly used past experience and the Catalina Island Map.

Transportation Modes

- Of those originating outside of California 57% flew into the region (prior to arriving on Catalina Island).
- Nearly 7 out of 10 visitors reached the island by a Catalina Island ferry.

Purposes, Activities, Areas Visited

- About two-thirds visited for a leisure or vacation trip.
- A wedding, birthday or other celebration was a secondary reason for 16%.
- 73% ate in local restaurants, 54% shopped, 38% explored and 36% went to the beach.
- Avalon, specifically the retail district and harbor are by far the most-visited areas of the island.

Future Visitation Intent

- Two-thirds of visitors report high likelihood to revisit in the next 12 months.
 - Given fairly low repeat visit levels, visitors may be more well-intentioned than their actual future re-visit behavior.

PROFILE SUMMARY – 3

Overnight Stays

- 35% stayed overnight on Catalina Island while 65% were Day-only visitors.
- 7 of 10 overnights stayed in a Catalina Island hotel/motel/B&B inn, for nearly 2 nights average.
 - Overnight visitors reserved their lodging about 3.5 weeks in advance.
- Day-only visitor groups spent an average of 6 hours on the island.

Spending

- Nearly everyone spent money on Catalina Island while here.
- Overall average daily spending was \$127 per individual.
 - Hotel guests outspent Day visitors \$194 versus \$82 daily per-capita, respectively.
- On an aggregated basis lodging at \$49 million, meals out at \$39 million and shopping/gifts at \$27 million were the highest spending categories.

PROFILE SUMMARY – 4

Visitor Demographics

- 44% of visitors traveled as a couple, with 32% in family/extended groups, which as may be expected, varies by season.
- Groups averaged 2.8 persons.
- 21% of travel groups included children under age 18; however 32% reported having children at home.
- The ethnic mix was relatively diverse, split at 52% Caucasians and 48% other ethnicities, principally Hispanic, as well as but fewer Asian-Americans and African-Americans.
- Adult visitors averaged 44.5 years of age.
- Reported median annual household income was \$87,100

Detailed Findings – Visitor Impacts

- **Visitor Volume**
- **Visitor Economic & Fiscal Impacts**
- **Employment Supported**

SUMMARY CATALINA ISLAND 2016

TOURISM IMPACT INDICATORS

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ALL SEGMENTS VOLUME & VISITOR DAYS

Catalina Island visitor segments are defined and measured by their lodging, in this case, paid lodging segments of hotel/motel/inn, vacation rental, camping, or moored boats, non-paid private home/other unpaid lodging, or day visitors.

- The largest visitor segment was Day visitors at 590,400 or 65% of total volume.
- 320,400 visitors, 35% of the total stayed overnight, with 218,900 or 24% of the total who were hotel guests.

Table 3 – Volume and Visitor Days by All Segments

Visitor Category	Catalina Island Visitors	Ratio of Total Visitors	Avg. Stay on Catalina Island (Days)	Total Visitor Days	Ratio of Total Visitor Days	Group Size
Hotel	218,945	24.0%	1.93	421,672	32.1%	2.39
Vacation Rental	35,603	3.9%	2.21	78,671	6.0%	3.88
Camping	10,765	1.2%	3.16	33,996	2.6%	2.11
Private Boats	52,723	5.8%	3.46	182,402	13.9%	2.48
Other Paid Lodging	99,092	10.9%	2.98	295,069	22.4%	2.79
Hotel & Other Paid Lodging	318,037	34.9%	2.25	716,741	54.5%	2.50
Private Home/Other Unpaid Lodging	2,364	0.3%	3.16	7,460	0.6%	2.29
Total Overnight	320,401	35.2%	2.26	724,202	55.1%	2.50
Day Visitors	590,372	64.8%	1.00	590,372	44.9%	3.07
Total Visitors	910,773	100.0%	1.44	1,314,574	100.0%	2.84

VISITOR PER-CAPITA DAILY & TOTAL SPENDING BY LODGING SEGMENT

- Visitors spent a total of \$166.7 million on Catalina Island in 2016.
- Overall each visitor spent an average of \$127 per day while here.
- Hotel visitors, 24% of total volume, spent the highest total, \$81.8 million, or 49% of total spending.
- Day visitors spent \$48.5 million, 29% of the total, while visitors staying in moored boats spent a total of \$18.1 million, 11% of total spending.

Table 4 – Spending Among All Segments on Catalina Island

Visitor Lodging Segment	Avg. Daily Per Capita Spending*	Total Avg. Visitor Trip Spending	Total Annual Spending	Ratio of Total
Hotel	\$ 194.10	\$ 373.82	\$ 81,845,788	49.1%
Vacation Rental	\$ 188.86	\$ 417.31	\$ 14,857,548	8.9%
Camping	\$ 85.69	\$ 270.59	\$ 2,913,023	1.7%
Private Boats	\$ 99.25	\$ 343.35	\$ 18,102,719	10.9%
Net: Other Paid Lodging	\$ 121.58	\$ 362.02	\$ 35,873,290	21.5%
Net: Hotel & Other Paid Lodging	\$ 164.24	\$ 370.14	\$ 117,719,078	70.6%
Private Home/Other Unpaid Lodging	\$ 59.05	\$ 186.38	\$ 440,523	0.3%
Total Overnight	\$ 163.16	\$ 368.79	\$ 118,159,600	70.9%
Day Visitors	\$ 82.18	\$ 82.18	\$ 48,518,556	29.1%
Total Visitors	\$ 126.79	\$ 182.58	\$ 166,678,156	100.0%

* per-capita spending allocated to all visitors whether or not they spent in that category. Spending includes taxes and tips.

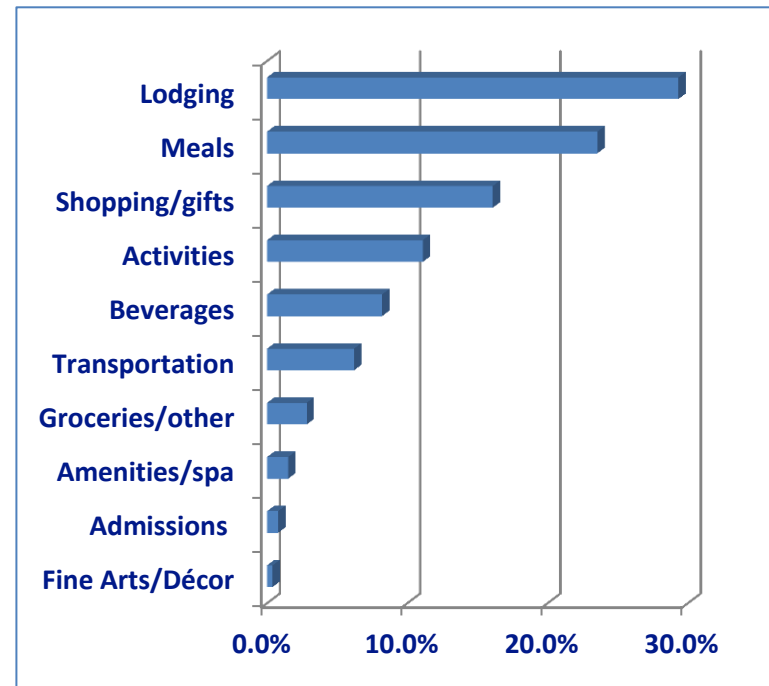
VISITOR SPENDING BY CATEGORY

- Of all visitor spending on Catalina Island, the highest by category was \$48.9 million for paid lodging, \$39.2 million for meals out and \$26.8 million on retail items/gifts.

Exhibit I – Category Share of Total Visitor Spending

Table 5 – Spending By Category

Spending Category	All Visitors To Catalina Island			
	Daily Per Capita Spending	Spending per Visitor Trip on C.I.	Total Annual Spending*	Ratio of Total
Lodging	\$ 37.19	\$ 53.68	\$ 48,886,598	29.3%
Meals	\$ 29.86	\$ 43.09	\$ 39,247,786	23.5%
Beverages	\$ 10.39	\$ 15.00	\$ 13,662,657	8.2%
Shopping/gifts	\$ 20.42	\$ 29.47	\$ 26,839,895	16.1%
Admissions (attractions, etc.)	\$ 1.00	\$ 1.44	\$ 1,315,883	0.8%
Transportation	\$ 7.86	\$ 11.35	\$ 10,333,321	6.2%
Activities/Tours/Equipment	\$ 14.08	\$ 20.33	\$ 18,512,019	11.1%
Fine Arts and Décor	\$ 0.50	\$ 0.72	\$ 659,787	0.4%
Amenities/Spa/Health	\$ 1.91	\$ 2.76	\$ 2,516,970	1.5%
Groceries & Other	\$ 3.58	\$ 5.16	\$ 4,703,239	2.8%
Total	\$ 126.79	\$ 183.01	\$ 166,678,156	100.0%



* Direct visitor spending including taxes and tips, and allocated to all visitors whether or not they spent in that category.

COMPARATIVE SPENDING - HOTEL GUEST & DAY VISITOR SEGMENTS

- As mentioned the 219,000 hotel visitors, 24% of volume, spent \$81.8 million in total on Catalina Island, 52% of total visitor spending.
 - Hotel guests spent \$194 average per visitor per day and \$374 each for all time on Catalina Island.
- Conversely, the 590,000 Day visitors, 65% of volume, spent \$48.5 million or 31% of the total.
 - Day visitors averaged \$82 per visitor per day and per trip.

Table 6 – Comparative Hotel & Day Visitor Spending

	Hotel Visitors				Day Visitors			
Spending Category	Daily Per Capita Spending	Spending per Visitor	Total Annual Spending	Ratio of Total	Daily Per Capita Spending	Spending per Visitor	Total Annual Spending	Ratio of Total
Lodging	\$ 87.78	\$ 169.07	\$ 37,016,057	45.2%	\$ -	\$ -	\$ -	0.0%
Meals	\$ 38.51	\$ 74.17	\$ 16,239,667	19.8%	\$ 21.87	\$ 21.87	\$ 12,913,398	26.6%
Beverages	\$ 12.22	\$ 23.54	\$ 5,153,002	6.3%	\$ 8.69	\$ 8.69	\$ 5,132,069	10.6%
Shopping/gifts	\$ 23.55	\$ 45.35	\$ 9,929,511	12.1%	\$ 22.84	\$ 22.84	\$ 13,486,878	27.8%
Admission Fees	\$ 1.97	\$ 3.80	\$ 832,404	1.0%	\$ 0.44	\$ 0.44	\$ 259,965	0.5%
Transportation	\$ 5.69	\$ 10.96	\$ 2,399,002	2.9%	\$ 12.17	\$ 12.17	\$ 7,183,367	14.8%
Activities/tours	\$ 16.25	\$ 31.30	\$ 6,852,435	8.4%	\$ 14.25	\$ 14.25	\$ 8,413,526	17.3%
Fine Arts/décor	\$ 0.35	\$ 0.67	\$ 147,251	0.2%	\$ 0.26	\$ 0.26	\$ 151,337	0.3%
Amenities/spa/health	\$ 3.87	\$ 7.46	\$ 1,633,788	2.0%	\$ 0.96	\$ 0.96	\$ 566,629	1.2%
Groceries & Other	\$ 3.90	\$ 7.50	\$ 1,642,669	2.0%	\$ 0.70	\$ 0.70	\$ 411,387	0.8%
Total	\$ 194.10	\$ 373.82	\$ 81,845,788	100.0%	\$ 82.18	\$ 82.18	\$ 48,518,556	100.0%

TAXES GENERATED FROM DIRECT SPENDING, AND LEVIED FEES

- Taxable direct visitor spending totaled \$115.6 million.
- This taxable spending generated \$5.8 million to the City of Avalon.
 - Of the total, \$5.1 million was transient lodging tax.
 - \$730,600 was retail sales tax.
- An additional \$1.2 million was levied locally on visitor activity for wharfage, admissions tax and harbor use as shown in the table.
- Thus Catalina Island visitors accounted for a total of \$7.1 million in taxes and fees to Catalina Island and the City of Avalon.
- Given that Avalon has 1,421 households, visitors pay the equivalent of \$4,997 per household in taxes and fees.

Table 7 – Visitor Generated Taxes and Locally Levied Use Fees

Visitor Spending Taxable Category	Taxable Spending	Tax Generated	Ratio
Lodging	\$ 42,521,000	\$ 5,102,520	87.5%
Meals	\$ 32,843,000	\$ 328,430	5.6%
Beverages	\$ 11,433,000	\$ 114,330	2.0%
Shopping/gifts	\$ 24,511,000	\$ 245,110	4.2%
Admission Fees (attractions, etc.)	\$ -	\$ -	0.0%
Transportation/Tours	\$ 944,000	\$ 9,440	0.2%
Activities fees/rentals	\$ -	\$ -	0.0%
Fine arts/décor	\$ 603,000	\$ 6,030	0.1%
Amenities spa/beauty/club	\$ 575,000	\$ 5,750	0.1%
Groceries & Other	\$ 2,148,000	\$ 21,480	0.4%
Subtotal Retail only	\$ 73,057,000	\$ 730,570	12.5%
Total Spending Taxes	\$ 115,578,000	\$ 5,833,090	82.2%
Locally Levied Fees			
Wharfage Fees		\$ 3,748,153	
Admission Tax		\$ 858,252	
Harbor Use Fees		\$ 351,005	
Total Levied fees		\$ 1,263,337	17.8%
Grand Total Taxes & Fees		\$ 7,096,427	100.00%

JOBS SUPPORTED BY VISITOR SPENDING

- Visitor spending supports local employment. Excluding taxes and tips from total visitor spending yields \$144 million in pre-tax total visitor spending, which supported 1,254 local full-time equivalent jobs on Catalina Island.
- These tourism supported jobs represent 47.7% of Avalon's 2,629 total jobs (SCAG, May 2017 Profile)
- Most jobs, 478 were in paid lodging, followed by 369 supported by visitor meals sales, and 129 supported by their beverage sales, the top three categories, and accounting for 78% of the visitor supported jobs supported.

Table 8 – Jobs Supported by Visitor Spending

Taxable Category	Sales by Sector (no taxes/tips)	Spending to Support One FTE Job	Direct Tourism Jobs	Ratio of Total Tourism Jobs
Lodging	\$ 42,521,000	\$ 88,895	478	38.1%
Meals	\$ 32,843,000	\$ 88,895	369	29.5%
Beverages	\$ 11,433,000	\$ 88,895	129	10.3%
Shopping/gifts	\$ 24,511,000	\$ 260,278	94	7.5%
Admission Fees (attractions, etc.)	\$ 1,315,883	\$ 110,830	12	0.9%
Transportation	\$ 5,286,231	\$ 85,860	62	4.9%
Activities/Tours/Equipment Rental	\$ 18,512,019	\$ 260,278	71	5.7%
Fine Arts and Décor	\$ 603,000	\$ 260,278	2	0.2%
Amenities/Spa/Health	\$ 2,462,345	\$ 125,490	20	1.6%
Groceries & Other	\$ 4,499,179	\$ 260,278	17	1.4%
Total	\$ 143,986,657	\$ 114,789	1,254	100.0%

DOMESTIC VERSUS INTERNATIONAL

- The study found that 98.4% of Catalina Island visitors were United States residents while 1.6% are from International countries.
- Due to slightly longer stays by International visitors, 1.70 days versus 1.44 days by Domestic, they accounted for a slightly higher share, 1.9% of visitor days (versus their volume).
- Total International spending was \$2.7 million, or a 1.6 % share versus \$164 million total spending by Domestic visitors, 98.4% share of the total.
- Each International visitor spent less per day, \$110 versus \$127 per U.S. resident visitor.
- As well, International group size was smaller, 2.16 persons versus 2.86 for Domestic groups.

Table 9 – Domestic versus International

	International	Domestic	All Visitors
Total Estimated Visitors	14,489	896,284	908,120
Percent of Total Visitors	1.6%	98.4%	100.0%
Spending Per Visitor Day	\$ 109.10	\$ 127.13	\$ 126.79
Visitor Days	24,569	1,290,006	1,314,574
Percent of Total Visitor Days	1.9%	98.1%	100.0%
Avg. Days on C.I. (including Day Visitors)	1.70	1.44	1.44
Total Spending	\$2,680,453	\$ 163,997,875	\$ 166,678,331
Percent of Total Visitor Spending	1.6%	98.4%	100.0%
Group Size	2.16	2.86	2.84

Detailed Findings - Visitor Profile

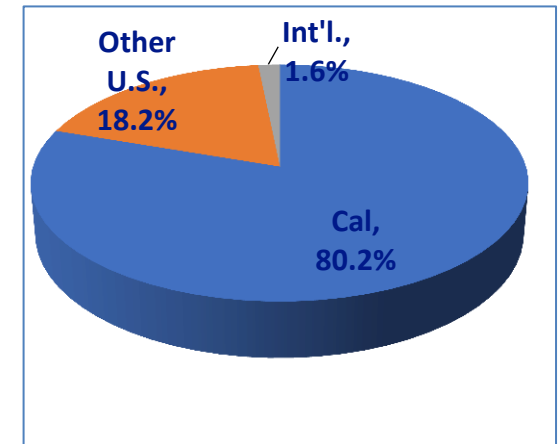
- Visitor Behaviors**
- Lodging**
- Spending**
- Travel Groups**
- Household Characteristics**

4 OF 5 VISITOR GROUPS FROM CALIFORNIA

- An 80% majority of Catalina Island visitors were from California, of which 27% were from Los Angeles County, 43% from other Southern California areas, and 11% from the rest of the state.
 - Another 18% were from Other States (excl. California), and 2% were International.
- A higher share, 88% of Hotel guests were Californians versus 79% of Day visitors.

Table 10 – Visitor Share by Overall Residence

	Total	Overnight or Day			Visitation		Travel Family Group
		Hotel/ Inn	Day-(excl Cruise)	Day-Cruise Ships	W-end	W-Day	
Base:	604	237	275	36	202	402	175
California	80.2%	88.4%	79.4%	71.1%	87.4%	77.3%	79.8%
Other US	18.2%	9.9%	17.9%	28.9%	11.0%	21.1%	19.0%
International	1.6%	1.8%	2.7%	0.0%	1.6%	1.6%	1.2%



CALIFORNIA TOP U.S. FEEDER; ONE-THIRD FROM LA COUNTY

- California accounted for 82% of U.S. resident visitors, with Arizona a distant second at 5%, with the other top states shown below, each at just above 1% share.
- The top 6 states accounted for 93% of U.S. resident visitation share.

Table I I – Top Feeder States
(>1%)

	Total	Overnight or Day			Visitation		Travel Family Group
		Hotel/ Inn	Day-(excl Cruise)	Day-Cruise Ships	W-end	W-Day	
Base: US resident	587	232	266	36	199	388	172
California	81.5%	89.9%	81.6%	71.1%	88.8%	78.5%	80.8%
Arizona	4.9%	0.7%	3.2%	11.1%	3.7%	5.5%	2.8%
Utah	1.8%	0.4%	0.3%	6.7%	0.3%	2.5%	2.9%
New York	1.7%	1.6%	2.7%	0.0%	0.9%	2.0%	2.4%
Minnesota	1.5%	1.4%	0.3%	4.4%	0.3%	2.1%	2.9%
Texas	1.5%	0.9%	0.8%	3.7%	0.7%	1.8%	2.1%
Top 6 States	92.9%	94.9%	88.9%	97.0%	94.7%	92.4%	93.9%

NEARLY 40% OF CALIFORNIANS FROM L A COUNTY

- California markets with highest share were central Los Angeles at 26% and Orange County at 21%.
 - Including the 12% from Los Angeles valley areas, Los Angeles County accounted for 38% of Californians.
- 13% were from San Bernardino/Riverside and 12% from San Diego, with 11% from the rest of the state

Table 12 – California Feeder Areas

	Total	Residence		Overnight or Day			Visitation		Travel Family Group
		LA Co.	Other So Cal	Hotel/ Inn	Day-(excl Cruise)	Day-Cruise Ships	W-end	W-Day	
Base: CA resident	490	211	242	206	214	25	174	316	144
Central LA	25.5%	62.4%	0.0%	21.2%	39.7%	13.5%	38.1%	19.7%	27.2%
Orange County	20.5%	3.6%	39.0%	20.2%	20.2%	12.5%	20.8%	20.3%	19.0%
San Bernardino-Riverside	13.1%	2.9%	24.4%	18.8%	12.1%	13.5%	10.8%	14.1%	12.5%
LA Valley Areas	12.2%	29.2%	0.5%	9.6%	13.2%	13.5%	13.8%	11.4%	13.0%
San Diego	11.6%	0.0%	23.9%	14.6%	7.4%	9.4%	9.7%	12.5%	12.2%
Central Coast	4.9%	0.4%	9.7%	6.6%	0.0%	8.3%	2.6%	5.9%	8.9%
Oakland/ East Bay	3.8%	0.0%	0.0%	2.4%	1.3%	11.5%	0.9%	5.1%	2.9%
Montry/Sta Cruz/Sn Jose/Palo Alto	3.2%	0.0%	0.0%	0.8%	2.5%	9.4%	0.5%	4.5%	0.4%
Bakersfield/ Mojave	1.8%	1.4%	2.4%	2.4%	1.3%	2.1%	1.0%	2.1%	0.8%
Sacramento Area	1.3%	0.0%	0.0%	2.6%	1.3%	0.0%	0.4%	1.7%	1.5%
Northern California	1.0%	0.0%	0.0%	0.6%	0.3%	3.1%	0.0%	1.4%	1.5%
San Joaquin Valley/ Stockton	0.9%	0.0%	0.0%	0.4%	0.3%	3.1%	0.3%	1.2%	0.0%
San Francisco	0.4%	0.0%	0.0%	0.0%	0.3%	0.0%	0.9%	0.1%	0.0%

2/3 FIRST-TIME VISITORS, MOST FROM LOCAL AREAS

- Given the high share of Southern Californians, somewhat surprisingly 67% overall were visiting Catalina Island for the first time (in past three years), whereas 33% were repeat visitors.
 - Even among L A County and other Southern California residents, only 39% per region had visited before.
- All visitors averaged 1.8 visits to Catalina Island in the past three years.
- Repeat visitors averaged 5.5 trips to Catalina Island in three years – nearly two per year.

Table 13 – Visited Catalina Island (in past 3 years)

	Total	Residence			Overnight or Day			Visitation		Travel Family Group
		LA Co.	Other So Cal	Other US	Hotel/ Inn	Day- (excl Cruise)	Day- Cruise Ships	W-end	W-Day	
Base:	604	213	242	95	237	275	36	202	402	175
No - First visit	66.9%	60.7%	60.4%	87.5%	69.3%	73.5%	74.8%	65.7%	67.3%	71.6%
Visited before	33.1%	39.3%	39.6%	12.5%	30.7%	26.5%	25.2%	34.3%	32.7%	28.4%
1 time	30.2%	32.8%	30.5%	43.6%	34.5%	36.8%	47.1%	26.3%	31.9%	38.7%
2-3 times	35.6%	45.5%	26.1%	52.6%	40.2%	48.2%	14.7%	53.6%	28.0%	39.4%
4-6 times	11.9%	11.6%	4.9%	3.8%	12.6%	7.9%	32.4%	3.3%	15.6%	6.0%
7-10 times	6.6%	6.6%	7.7%	0.0%	8.0%	2.0%	0.0%	5.6%	7.0%	9.7%
11+ times	15.7%	3.4%	30.7%	0.0%	4.6%	5.1%	5.9%	11.2%	17.6%	6.3%
Mean (all visitors)	1.82	1.09	3.70	0.20	0.95	0.57	0.67	1.24	2.22	0.85
Mean (repeat visitors)	5.48	2.78	9.36	1.56	3.09	2.16	2.68	3.60	6.81	2.99

INTERNET IS PRIMARY PLANNING SOURCE FOR CATALINA ISLAND INFORMATION

Sources that visitors used for Catalina Island information when planning this trip are discussed below and shown on the next slide.

- Overall, 98% used at least one information source for planning this Catalina Island trip.
- 48% used an internet source, of which:
 - 35% used a general travel website
 - 10% used a ferry's website(s)
 - 13% used a website or app from the Catalina Island Visitor Bureau
- 20% relied on referrals from family or friends, while 16% who had visited before relied on their own experience when planning their trip.
- Far more, 66% of Hotel guests used internet sources compared to other segments.

INTERNET IS PRIMARY INFORMATION PLANNING SOURCE

Table 14 – Planning Sources for Catalina Island Information (>1%)

	Total	Residence			Overnight or Day			Visitation		Travel Family Group
		LA Co.	Other So Cal	Other US	Hotel/ Inn	Day-(excl Cruise)	Day-Cruise Ships	W-end	W-Day	
Base:	604	213	242	95	237	275	36	202	402	175
ANY INTERNET SOURCE	48.4%	62.0%	42.2%	46.1%	65.8%	60.3%	25.2%	56.4%	45.2%	47.0%
General travel website/search like Travelocity, etc.	35.0%	41.5%	27.3%	43.7%	51.5%	37.6%	25.2%	34.7%	35.2%	34.4%
Family member/friend	19.6%	21.9%	13.0%	23.4%	21.2%	29.4%	3.7%	27.5%	16.4%	19.8%
Own experience/been here before	15.9%	11.4%	25.4%	10.5%	18.0%	9.5%	3.7%	17.0%	15.5%	12.9%
Catalina Express/Flyer website	9.6%	19.4%	7.1%	1.6%	8.1%	17.5%	0.0%	16.5%	6.8%	10.2%
Catalina Island Visitor Bureau web, mobile or app	5.4%	4.8%	7.2%	3.7%	11.5%	6.3%	0.0%	6.2%	5.1%	4.2%
Interactive website like Yelp or Trip Advisor	2.3%	1.7%	4.1%	0.0%	5.6%	1.8%	0.0%	3.3%	1.9%	2.4%
Auto Club or retail guide books	2.0%	1.1%	3.9%	0.5%	0.7%	1.8%	4.4%	1.6%	2.2%	4.1%
Hotel	1.0%	0.6%	1.2%	1.8%	2.8%	0.3%	0.0%	1.2%	0.9%	1.5%
None	2.0%	2.0%	3.1%	0.0%	1.1%	1.7%	3.0%	2.4%	1.8%	1.8%

ON ISLAND, ONE-FIFTH USED CATALINA MAP FOR AREA INFORMATION

Sources used for Catalina Island information once here are discussed and shown below.

- Overall 76% of visitors sought information on Catalina Island once here.
- For those using a resource, 23% used their past/personal experience, while 22% used the Catalina Map, with Internet sources accounting for just 13% of in-destination sources.

Table 15 – Sources for Catalina Island Information on Island (>4%)

	Total	Residence			Overnight or Day			Visitation		Travel Family Group
		LA Co.	Other So Cal	Other US	Hotel/ Inn	Day- (excl Cruise)	Day-Cruise Ships	W-end	W-Day	
Base:	604	213	242	95	237	275	36	202	402	175
Own experience/been here before	23.4%	26.5%	25.7%	9.6%	23.3%	17.3%	15.6%	26.0%	22.3%	19.7%
Catalina island Map	21.6%	16.9%	20.1%	37.2%	21.9%	26.1%	17.8%	23.1%	21.1%	18.4%
ANY INTERNET SOURCE	13.2%	7.8%	17.3%	16.1%	23.8%	12.3%	3.0%	16.3%	12.0%	9.4%
Hotel/ concierge/ hotel rack brochures	12.3%	16.8%	13.6%	5.8%	23.3%	13.7%	3.0%	12.8%	12.1%	14.6%
General Travel search, website, or app	8.9%	5.3%	12.2%	8.9%	15.7%	9.7%	1.5%	8.2%	9.2%	7.2%
Catalina Island visitor center	6.0%	9.8%	5.0%	3.8%	7.9%	8.1%	3.0%	7.4%	5.5%	4.6%
Family member/friend	5.3%	5.2%	2.7%	9.0%	4.4%	6.9%	0.0%	6.4%	4.8%	3.7%
Local friends/family	5.2%	5.5%	6.5%	1.9%	6.2%	6.7%	0.0%	6.5%	4.7%	2.8%
Catalina Express Magazine	4.2%	5.3%	3.2%	5.9%	6.9%	5.4%	0.0%	2.8%	4.7%	3.7%
None	23.6%	19.0%	26.1%	25.8%	8.8%	16.4%	59.3%	10.5%	28.9%	32.4%

GOOGLE MOST-USED INTERNET RESOURCE, THEN FERRY WEBSITES

- Among those using the internet for planning and/or once on the island, 54% used Google search, 22% used a ferry website and 14% used an interactive website, especially high, 35%, by Los Angeles County resident visitors.
- Of note, 13% used the Catalina Island visitor bureau website or mobile app,
- Another 13% used the Catalina Island Visitor Bureau website/app.

Table 16 – Internet Sources Used (>1%)

	Total	Residence			Overnight or Day			Visitation		Travel Family Group
		LA Co.	Other So Cal	Other US	Hotel/ Inn	Day- (excl Cruise)	Day- Cruise Ships	W-end	W-Day	
Base: Used internet	380	142	154	56	178	173	9	126	254	110
Google search engine	53.9%	50.1%	51.0%	75.8%	62.9%	48.4%	50.0%	52.1%	54.8%	56.8%
Catalina Express/Flyer website	22.2%	34.8%	18.0%	10.5%	16.0%	32.2%	0.0%	30.6%	18.0%	23.3%
Trip Advisor, Yelp/interactive travel site	14.0%	10.0%	22.9%	7.5%	20.1%	12.0%	0.0%	20.5%	10.8%	11.1%
Catalina Is. Visitor Bureau web/mobile/app	12.5%	10.4%	17.0%	8.0%	20.4%	11.0%	0.0%	14.0%	11.8%	11.5%
Other internet or app based resource	8.1%	3.5%	8.5%	1.2%	6.3%	4.6%	25.0%	4.7%	9.8%	3.2%
Travel website, e.g. expedia, travelocity	7.8%	8.1%	9.6%	6.7%	15.3%	2.6%	11.1%	3.4%	10.0%	11.9%
Other search engine	2.5%	3.2%	2.8%	1.4%	2.9%	2.9%	0.0%	3.2%	2.1%	1.6%
Facebook	1.3%	0.0%	1.8%	4.0%	1.9%	0.0%	5.6%	0.5%	1.7%	1.6%
None of these	1.9%	0.0%	0.5%	10.1%	0.5%	0.0%	13.9%	0.0%	2.8%	4.0%

CI MAIN DESTINATION FOR 2/3 OF VISITOR GROUPS, ESPECIALLY SO CAL RESIDENTS

- Catalina Island was the main destination of 66% of visitor groups on this trip.
 - This was the main destination for most regional visitors – 85% of L A County residents and 78% for other Southern California residents.
- By contrast, Catalina Island was named as the main locale by 25% of Other U.S. visitors, while 31% of them named Mexico, likely due to the cruise passenger visitors.
- A strong 91% of Hotel guests named Catalina Island as their main destination.

Table 17 – Main Trip Destination

	Total	Residence			Overnight or Day			Visitation		Travel Family Group
		LA Co.	Other So Cal	Other US	Hotel/ Inn	Day- (excl Cruise)	Day- Cruise Ships	W-end	W-Day	
Base:	604	213	242	95	237	275	36	202	402	175
Catalina Island	66.0%	85.2%	78.2%	25.3%	91.0%	79.6%	5.2%	90.3%	56.2%	56.3%
Mexico	23.0%	14.2%	20.3%	31.9%	0.0%	0.0%	94.8%	0.0%	32.3%	33.8%
Los Angeles area	5.6%	0.0%	0.2%	23.5%	3.4%	10.5%	0.0%	4.4%	6.0%	6.3%
Southern California areas (non LA, Santa Barbara to San Diego)	4.4%	0.6%	1.0%	17.1%	4.4%	8.3%	0.0%	4.6%	4.4%	3.5%
Calif. and/or other Western States	0.4%	0.0%	0.0%	1.1%	0.4%	0.8%	0.0%	0.0%	0.6%	0.0%
Other California (SFO, No. Cal, etc.)	0.2%	0.0%	0.0%	0.0%	0.0%	0.5%	0.0%	0.4%	0.1%	0.0%
All California	0.1%	0.0%	0.0%	0.6%	0.0%	0.3%	0.0%	0.0%	0.1%	0.0%
All other areas	0.2%	0.0%	0.3%	0.5%	0.9%	0.0%	0.0%	0.3%	0.2%	0.0%

HALF OF NON-SOCAL VISITORS DROVE INTO THE SOUTHERN CALIFORNIA REGION

- 53% of non-local visitor groups drove to arrive in the Southern California region, 51% by personal vehicle and 3% by a rental. Another 42% arrived by commercial air.
- Expectedly, this varies by origin with 57% of Other U.S. visitors arriving by air although 39% drove a personal or rental vehicle to the region.
- Of note, 62% of day (non-cruise) visitors flew to the region.

Table 18 – Transportation into Southern California Region

	Total	Residence			Overnight or Day			Visitation		Travel Family Group
		LA Co.	Other So Cal	Other US	Hotel/ Inn	Day- (excl Cruise)	Day- Cruise Ships	W-end	W-Day	
Base: SC visitor	171	4	22	94	58	79	18	40	131	43
Personal vehicle	50.6%	36.6%	62.0%	36.5%	51.1%	27.3%	71.6%	32.9%	54.1%	53.9%
Commercial airline	41.8%	43.9%	11.4%	57.4%	41.6%	62.3%	22.4%	54.1%	39.2%	40.6%
Cruise ship	3.3%	0.0%	20.1%	2.0%	5.1%	0.0%	6.0%	0.0%	3.9%	4.7%
Rental vehicle	2.5%	0.0%	0.0%	2.7%	0.7%	6.6%	0.0%	8.1%	1.4%	0.0%
RV/motorhome	0.7%	0.0%	6.5%	0.0%	0.0%	1.9%	0.0%	0.0%	0.8%	0.0%
Public bus/Greyhound	0.4%	0.0%	0.0%	0.6%	0.0%	0.9%	0.0%	2.0%	0.0%	0.9%
Private/charter airplane	0.3%	19.5%	0.0%	0.0%	1.5%	0.0%	0.0%	1.6%	0.0%	0.0%
Tour coach	0.2%	0.0%	0.0%	0.3%	0.0%	0.0%	0.0%	1.2%	0.0%	0.0%
Other	0.3%	0.0%	0.0%	0.6%	0.0%	0.9%	0.0%	0.0%	0.4%	0.0%

NEARLY 7 OF 10 VISITORS REACHED CATALINA ISLAND BY FERRY

- To reach Catalina Island, a two-thirds majority, 69% took a Catalina Island ferry.
- The ferries were much higher at 83% for L A County residents, while 34% of weekday visitors arrived on a cruise ship tender.
- Another 24% arrived on a cruise ship tender and few used any other mode.

Table 19 – Transportation to Arrive on Catalina Island

	Total	Residence			Overnight or Day			Visitation		Travel Family Group
		LA Co.	Other So Cal	Other US	Hotel/ Inn	Day- (excl Cruise)	Day- Cruise Ships	W-end	W-Day	
Base:	604	213	242	95	237	275	36	202	402	175
Catalina Express or Catalina Flyer ferry	68.5%	82.6%	66.9%	54.9%	99.3%	97.3%	0.0%	93.0%	58.7%	61.8%
Cruise ship (tender)	24.3%	14.2%	20.3%	38.9%	0.0%	0.0%	100.0%	0.0%	34.1%	33.8%
Private/charter yacht or boat	5.3%	0.0%	11.6%	4.1%	0.0%	0.0%	0.0%	2.8%	6.3%	3.5%
Private plane/seaplane	1.0%	1.4%	1.3%	0.0%	0.7%	1.5%	0.0%	3.3%	0.0%	0.0%
Helicopter	0.9%	1.7%	0.0%	2.0%	0.0%	1.2%	0.0%	0.8%	1.0%	0.8%

LEISURE/VACATION MAIN REASON FOR VISITING CATALINA ISLAND

- Nearly two-thirds, or 67% of visitor groups visited Catalina Island primarily for leisure/vacation, while another 16%, came for a specific celebration, the two most cited reasons.
- More as compared to the Total, 27% of L A County residents came for a celebration, as did 23% of Hotel guests yet about 6 in ten of each of those segments were visiting for pleasure.

Table 20 – Main Reason for Visiting Catalina Island

	Total	Residence			Overnight or Day			Visitation		Travel Family Group
		LA Co.	Other So Cal	Other US	Hotel/ Inn	Day- (excl Cruise)	Day-Cruise Ships	W-end	W-Day	
Base:	604	213	242	95	237	275	36	202	402	175
Vacation/pleasure/to visit	66.7%	59.1%	64.3%	72.7%	66.7%	60.6%	80.0%	53.9%	71.8%	72.2%
Celebration: anniversary/birthday	16.0%	26.6%	16.5%	2.5%	22.9%	22.5%	4.4%	22.6%	13.3%	12.3%
Sightseeing/explore the area	7.2%	5.7%	5.0%	16.4%	2.3%	12.8%	4.4%	11.8%	5.3%	8.0%
Conduct business	2.6%	2.8%	4.1%	0.5%	1.1%	1.0%	0.0%	0.5%	3.5%	0.0%
Outdoor or water recreation	2.0%	3.5%	1.2%	1.4%	2.1%	1.7%	0.0%	5.5%	0.6%	0.8%
Special event	1.8%	1.5%	3.1%	0.0%	3.0%	0.7%	0.0%	4.1%	0.9%	1.1%
Visit relatives/friends/personal or social visit	0.7%	0.1%	1.2%	0.9%	1.1%	0.0%	1.5%	0.8%	0.6%	0.3%
Combining business or meeting and pleasure	0.1%	0.2%	0.2%	0.0%	0.2%	0.3%	0.0%	0.0%	0.2%	0.0%
Entertainment/live music/concert	0.1%	0.3%	0.0%	0.0%	0.4%	0.0%	0.0%	0.3%	0.0%	0.0%
Other	2.9%	0.4%	4.4%	5.7%	0.4%	0.4%	9.6%	0.6%	3.8%	5.3%

LEISURE VACATION TOPS LIST OF ALL REASONS TO VISIT CATALINA ISLAND

Respondents gave both their main and other reasons for visiting Catalina Island. Discussed and shown below are their combined (main + other) reasons.

- Overall 79% (not shown) indicated their main reason was their only reason for visiting.
- All reasons for visitation are consistent with the main reasons: 72% for leisure and 19% for a celebration.

Table 21 – All Reasons/Purposes for Catalina Island Visit

	Total	Residence			Overnight or Day			Visitation		Travel Family Group
		LA Co.	Other So Cal	Other US	Hotel/ Inn	Day- (excl Cruise)	Day- Cruise Ships	W-end	W-Day	
Base:	604	213	242	95	237	275	36	202	402	175
Vacation/pleasure/to visit	72.4%	65.4%	69.9%	80.1%	75.5%	68.0%	81.5%	61.4%	76.9%	76.2%
Celebration: wedding anniversary/birthday	19.0%	30.1%	19.5%	6.4%	27.7%	26.1%	5.9%	26.6%	15.9%	15.9%
Sightseeing/explore the area	13.6%	10.2%	13.0%	23.9%	9.7%	19.9%	10.4%	16.9%	12.2%	14.0%
Outdoor or water recreation	6.0%	3.5%	10.2%	3.9%	4.9%	4.8%	1.5%	8.4%	5.0%	3.6%
Conduct business	3.5%	2.8%	6.3%	0.5%	1.1%	3.1%	0.0%	0.5%	4.7%	0.0%
Special event	2.3%	1.5%	3.9%	1.2%	4.2%	0.9%	0.0%	4.5%	1.4%	2.1%
Visit relatives/friends/personal or social visit	2.0%	0.7%	3.1%	3.3%	1.1%	1.4%	1.5%	0.8%	2.5%	2.7%
Combining business or meeting and pleasure	1.1%	0.3%	2.4%	0.6%	0.4%	2.6%	0.0%	0.0%	1.6%	0.0%
Entertainment/live music/concert	0.2%	0.3%	0.2%	0.0%	0.7%	0.0%	0.0%	0.3%	0.1%	0.0%
Other	6.3%	1.9%	7.5%	14.7%	0.4%	3.1%	19.3%	0.8%	8.5%	5.3%

MOST VISITORS ATE IN RESTAURANTS & SHOPPED

Visitor groups reported their activities on Catalina Island discussed below and shown on the next slide.

- Over 99% of visitor groups did some activity on Catalina Island while here.
- The vast majority, 73%, ate in local restaurants.
- Next-most popular was shopping by 54%, followed by 38% who were sightseeing/ exploring, with 36% going to the beach and 26% renting/touring on golf carts.
- Generally Hotel guests did more activities than Day visitors and other segments.

MOST VISITORS ATE IN RESTAURANTS

Table 22 – Catalina Island Activities (>4%)

	Total	Residence			Overnight or Day			Visitation		Travel Family Group
		LA Co.	Other So Cal	Other US	Hotel/ Inn	Day-(excl Cruise)	Day-Cruise Ships	W-end	W-Day	
Base:	604	213	242	95	237	275	36	202	402	175
Eat in restaurants	73.0%	75.6%	70.7%	71.1%	81.8%	82.5%	54.1%	77.9%	71.1%	67.4%
Shopping	54.3%	54.0%	49.2%	67.4%	56.6%	54.4%	64.4%	47.5%	57.1%	56.1%
Sightsee/explore the area	37.6%	32.6%	35.8%	52.2%	45.1%	36.2%	30.4%	30.8%	40.4%	30.6%
Go to the beach	36.1%	38.3%	37.1%	37.6%	43.6%	32.0%	29.6%	41.8%	33.8%	39.1%
Golf Cart rental or tour	26.3%	35.9%	23.2%	20.6%	30.9%	32.8%	17.8%	37.5%	21.8%	27.2%
Just visit/socialize	25.0%	23.4%	22.5%	30.2%	26.3%	21.2%	33.3%	25.1%	24.9%	26.4%
Water activities - swim, snorkel, kayak, etc.	20.2%	22.5%	21.9%	14.4%	30.2%	22.0%	4.4%	23.7%	18.7%	25.7%
Hiking	12.4%	10.1%	16.0%	11.2%	19.8%	7.8%	0.0%	15.6%	11.1%	11.7%
Walking tour	11.7%	13.9%	7.8%	13.6%	12.9%	13.5%	10.4%	17.2%	9.5%	12.6%
See historic or architectural sites	9.6%	8.7%	7.5%	17.3%	13.9%	7.7%	8.1%	10.2%	9.3%	10.5%
Visit art museum/gallery	8.7%	8.6%	8.6%	8.4%	18.9%	6.5%	1.5%	9.7%	8.3%	8.4%
Parasailing	7.2%	9.2%	4.9%	11.8%	9.9%	6.8%	8.1%	8.7%	6.7%	9.9%
Zip-lining	6.2%	5.2%	7.3%	5.4%	15.3%	6.0%	0.0%	10.0%	4.7%	7.2%
Hummer/Jeep tour	5.0%	4.1%	6.3%	4.1%	12.5%	3.1%	1.5%	4.9%	5.0%	4.4%
Biking/bike tour	4.8%	3.8%	6.6%	1.8%	6.7%	3.1%	0.0%	8.8%	3.1%	1.7%
None of the above	0.7%	0.5%	1.1%	0.6%	0.4%	0.7%	1.5%	0.4%	0.8%	0.0%

AVALON RETAIL AREA & HARBOR TOP AREAS VISITED

- Virtually all visitors went to a venue on Catalina Island.
- Over 76% visited Avalon retail/village and 69% went to the Harbor area, while 48% went to the Catalina Island Pier and 34% to Descanso Beach.
- These were the top-4 areas visited by far, and highly so by every segment.

Table 23 – Catalina Island Venues/Areas Visited (<4%)

	Total	Residence			Overnight or Day			Visitation		Travel Family Group
		LA Co.	Other So Cal	Other US	Hotel/ Inn	Day- (excl Cruise)	Day-Cruise Ships	W-end	W-Day	
Base:	604	213	242	95	237	275	36	202	402	175
Avalon - retail district	75.7%	72.0%	75.6%	85.0%	75.1%	77.4%	81.5%	70.1%	78.0%	79.8%
Avalon - harbor area	68.6%	69.8%	69.9%	70.9%	72.8%	71.8%	52.6%	69.3%	68.3%	69.1%
Catalina Pier/Visitor Center	48.4%	56.0%	47.1%	46.4%	64.4%	53.7%	21.5%	50.4%	47.6%	43.9%
Descanso Beach	34.4%	34.6%	35.0%	33.1%	48.3%	32.5%	19.3%	38.7%	32.6%	30.4%
Catalina Island Museum	15.5%	13.1%	17.0%	11.9%	28.2%	12.0%	8.9%	13.0%	16.5%	13.1%
Wrigley Gardens	14.8%	16.4%	13.6%	14.7%	24.0%	13.5%	3.7%	15.3%	14.7%	11.4%
Island Interior/Conservancy areas	12.2%	12.4%	14.6%	8.3%	22.6%	11.1%	1.5%	21.4%	8.4%	9.4%
Two Harbors	5.3%	2.3%	11.2%	0.8%	4.9%	4.2%	0.0%	5.5%	5.2%	2.4%
Wrigley Institute	4.9%	4.3%	3.9%	10.2%	3.9%	6.4%	0.0%	6.0%	4.4%	4.0%
None of the above	0.8%	1.9%	0.3%	0.5%	1.6%	0.0%	0.0%	0.6%	0.9%	0.4%

INTENTION TO REVISIT IS STRONG FOR VISITORS FROM THE REGION

- Two-thirds, or 66% of visitors indicated they are highly or somewhat likely to return to the island in the next year.
 - The overall mean rating is 3.7 (out of 5), in the “somewhat likely” range
- Perhaps expected, visitors from L A County and Southern California indicated higher likelihood to revisit, 73% each, versus 39% for those from outside the area.
 - This may be due to proximity and thus opportunity to revisit rather than differences in their experience but further research could better illuminate this.

Table 24 – Likelihood/Intention to Return to Catalina Island

	Total	Residence			Overnight or Day			Visitation		Travel Family Group
		LA Co.	Other So Cal	Other US	Hotel/ Inn	Day- (excl Cruise)	Day- Cruise Ships	W-end	W-Day	
Base:	604	213	242	95	237	275	36	202	402	175
5. Highly likely	40.8%	49.3%	44.9%	25.1%	42.0%	41.7%	21.5%	50.6%	36.9%	32.0%
4. Somewhat likely	24.9%	24.0%	28.2%	13.7%	26.6%	26.1%	27.4%	23.3%	25.6%	25.4%
Extremely + Very	65.8%	73.4%	73.1%	38.8%	68.6%	67.7%	48.9%	73.9%	62.5%	57.5%
3. Neutral/unsure	11.1%	13.1%	7.0%	14.5%	10.2%	10.7%	14.8%	12.5%	10.5%	13.3%
2. Somewhat unlikely	9.0%	7.3%	9.8%	10.1%	8.8%	9.3%	11.1%	5.4%	10.5%	10.5%
1. Highly/very unlikely	14.1%	6.2%	10.2%	36.6%	12.3%	12.3%	25.2%	8.2%	16.5%	18.7%
Mean rating (5 - 1):	3.7	4.0	3.9	2.8	3.8	3.8	3.1	4.0	3.6	3.4

Overnight Lodging

35% VISITORS STAYED OVERNIGHT ON CATALINA ISLAND OVERALL THIS YEAR

- Overall, 69% of Catalina Island visitor groups stayed overnight somewhere on their trip, thus just 31% were on day-only trips (anywhere).
- On this trip, 35% stayed overnight on Catalina Island; 15% stayed in the Los Angeles area and 31% stayed in other destinations (in addition to or except for Catalina Island).
 - Thus, 65% of Catalina Island visitors came for the Day-only.
- Interestingly, while more Other U.S. visitors 95% stayed overnight in other locations, fewer, 22% stayed on Catalina Island versus 31% of L A County and 48% of other So. Cal. residents.
 - Also, more, 77% of weekday visitors were overnight on their trip and 40% stayed overnight on Catalina Island, versus 49% of weekenders who stayed overnight anywhere and 33% on Catalina.

Table 25 – Overnight Visitation on Trip

Percent staying overnight	Total	Residence			Overnight or Day			Visitation		Travel Family Group
		LA Co.	Other So Cal	Other US	Hotel/ Inn	Day- (excl Cruise)	Day- Cruise Ships	W-end	W-Day	
Base:	604	213	242	95	237	275	36	202	402	175
Total – all destinations	68.5%	45.4%	71.7%	94.9%	100.0%	22.3%	100.0%	48.7%	76.5%	71.4%
Nights on Catalina Island	35.2%	30.9%	48.3%	21.5%	100.0%	0.0%	0.0%	39.6%	33.4%	29.6%
Nights in Los Angeles area (other than Catalina)	14.9%	0.6%	5.3%	58.7%	8.6%	18.0%	16.3%	9.5%	17.1%	17.8%
Nights in all other locations/ destinations	31.0%	14.3%	22.4%	61.2%	8.6%	10.3%	100.0%	4.8%	41.6%	40.3%

OVERNIGHT VISITORS STAYED JUST OVER 2 NIGHTS ON CATALINA ISLAND

Visitors overnight stay or day trip behaviors are discussed below and shown in tables on the next slide.

- For all destinations on this trip:
 - All Catalina Island visitors spent an average of 2.8 nights away from home overall anywhere on their trip.
 - Overnight Catalina Island visitors spent an average of 4.2 total nights overall away from home.
- On Catalina Island:
 - All Catalina Island visitors spent an average of 1.44 nights on this trip on the island.
 - Overnight Catalina Island visitors spent an average of 2.26 nights here.
- Among those staying overnight on Catalina Island, L A County resident visitors stayed 1.65 nights average, versus 2.28 nights for Southern Californians, and 3.26 for Other U.S. resident visitors.

OVERNIGHT VISITORS STAYED OVER 2 NIGHTS ON CATALINA ISLAND

Table 26a – Average Nights Stayed in Locations on Trip - All Visitors

Mean nights per all visitors	Total	Residence			Overnight or Day			Visitation		Travel Family Group
		LA Co.	Other So Cal	Other US	Hotel/ Inn	Day-(excl Cruise)	Day-Cruise Ships	W-end	W-Day	
Base: all visitors	604	213	242	95	237	275	36	202	402	175
Total	2.88	1.11	2.05	6.06	2.78	1.94	4.28	1.76	3.33	3.33
Nights on Catalina island	1.44	1.20	1.62	1.48	1.93	1.00	1.00	1.41	1.46	1.34
Nights in Los Angeles area (excl. Catalina)	0.74	0.03	0.06	2.64	0.29	1.37	0.33	0.54	0.82	1.03
Nights in all other locations/destinations	1.34	0.57	0.88	2.72	0.57	0.57	3.96	0.41	1.72	1.66

Table 26b – Average Nights Stayed in Locations on Trip - Overnight Visitors

Mean nights per <i>overnight</i> CI visitors	Total	Residence			Overnight or Day			Visitation		Travel Family Group
		LA Co.	Other So Cal	Other US	Hotel/ Inn	Day-(excl Cruise)	Day-Cruise Ships	W-end	W-Day	
Minimum Base: Overnight on CI	85	89	10	33	20	29	36	11	67	23
Total	4.20	2.45	2.86	6.38	2.78	8.70	4.28	3.61	4.35	4.66
Nights on Catalina Island	2.26	1.65	2.28	3.26	1.93	*	*	2.04	2.37	2.14
Nights in Los Angeles area (other than Catalina)	4.96	*	1.21	4.50	3.35	7.59	*	5.73	4.79	5.81
Nights in all other locations/destinations	4.33	*	3.94	4.45	6.55	5.55	3.96	8.67	4.13	4.12

8 IN 10 CATALINA ISLAND OVERNIGHT VISITORS STAYED IN A HOTEL/MOTEL

- 24% of *all* visitors stayed in a Catalina Island hotel/motel, while 11% stayed in other lodging and as mentioned 65% were Day visitors.
- Of *overnight* guests, 68% stayed in a Catalina Island hotel/inn, with 17% staying on a moored boat and 11% in a vacation rental.

Table 27 – Catalina Island Lodging

	Total	Residence			Visitation		Travel Family Group
		LA Co.	Other So Cal	Other US	W-end	W-Day	
Base: Overnight on SCI	293	89	144	33	101	192	78
Hotel/inn	68.1%	74.7%	64.8%	59.0%	64.1%	70.0%	68.4%
On-board private boat	16.5%	5.7%	23.7%	19.2%	7.5%	20.7%	15.0%
Private paid vacation rental like airbnb, VRBO	11.1%	15.5%	9.0%	9.8%	18.8%	7.4%	12.5%
Camping	3.4%	1.8%	2.3%	12.0%	8.2%	1.0%	3.1%
Private unpaid residence of friends, family	0.6%	1.2%	0.1%	0.0%	1.1%	0.4%	0.9%
Bed & Breakfast Inn	0.2%	0.8%	0.0%	0.0%	0.0%	0.4%	0.0%
Other	0.1%	0.2%	0.1%	0.0%	0.3%	0.0%	0.0%
Base: All SCI Visitors	604	213	242	95	202	402	175
Day Visitor	64.8%	69.1%	51.7%	78.5%	60.4%	66.6%	70.4%
Hotel/inn	24.0%	23.3%	31.3%	12.7%	25.4%	23.5%	20.3%
Other paid lodging	10.9%	7.1%	16.9%	8.8%	13.7%	9.8%	9.1%
Private/Other	0.3%	0.4%	0.1%	0.0%	0.5%	0.1%	0.3%

PAID LODGING RESERVED 3.2 WEEKS IN ADVANCE OF TRIP

- 86% of paid lodging guests made an advance reservation; those who did reserved an average of 3.2 weeks in advance.
- The farther from Catalina Island the longer the advance reservation period, from 2.8 weeks for LA County visitors to 3.3 weeks for Southern Californians and 4.1 weeks for Other U.S. visitors.

Table 28 – Advance Reservation Period

	Total	Residence			Hotel/ Inn	Visitation		Travel Family Group
		LA Co.	Other So Cal	Other US		W-end	W-Day	
Base: Overnight in SCI paid lodging	271	80	136	32	237	91	180	71
0 (Did not plan ahead/decided or reserved here)	13.7%	19.3%	11.3%	8.1%	14.3%	11.8%	14.8%	13.3%
1 week	14.0%	19.3%	11.4%	11.8%	15.3%	10.5%	15.9%	19.1%
2 weeks	11.2%	7.4%	13.9%	6.4%	10.9%	14.7%	9.3%	9.2%
3-4 weeks	30.2%	26.0%	33.7%	29.2%	29.1%	28.4%	31.2%	32.6%
5-8 weeks	15.2%	12.1%	11.9%	37.9%	17.5%	14.1%	15.8%	14.7%
9-12 weeks	8.0%	7.6%	9.4%	2.7%	8.1%	9.0%	7.5%	5.8%
More than 12 weeks	7.8%	8.3%	8.4%	4.0%	4.8%	11.6%	5.7%	5.4%
Median (weeks):	3.24	2.81	3.29	4.13	3.15	3.42	3.15	3.02

NEARLY 7 IN 10 RESERVED THEIR PAID LODGING ONLINE

- 69% of guests who reserved any Catalina Island paid lodging in advance did so by internet, of which 38% used a general travel website and 31% used the lodging website.
- Hotel guests specifically were more likely to use a travel website, 44% with 29% using the hotel website.
- This reservation pattern varied little by residence but did differ by weekend, with 29% using a travel website but 35% used the hotel site.

Table 29 – Method of Reserving Paid Lodging

	Total	Residence			Hotel/ Inn	Visitation		Travel Family Group
		LA Co.	Other So Cal	Other US		W-end	W-Day	
Base: Overnight in SCI paid lodging	271	80	136	32	237	91	180	71
On a travel website like hotels.com, Travelocity etc.	37.6%	38.8%	41.7%	20.3%	43.7%	29.0%	42.4%	39.9%
On the lodging's website	31.1%	23.5%	30.1%	48.8%	28.6%	34.9%	29.1%	33.7%
By call to the lodging or "800" number	15.2%	16.6%	14.2%	13.5%	18.2%	11.4%	17.3%	17.4%
Through other vacation rental agency	4.1%	8.7%	1.8%	4.0%	1.6%	3.6%	4.4%	3.4%
My company booked it	1.3%	1.8%	1.5%	0.0%	1.6%	2.5%	0.7%	0.8%
Through a travel agent	1.1%	0.4%	0.9%	4.7%	1.1%	1.4%	0.9%	0.0%
Through vacation shared housing like airbnb	0.9%	0.0%	1.8%	0.0%	0.0%	2.4%	0.0%	1.1%
Through my/our tour arranger or operator	0.5%	0.0%	0.6%	2.0%	0.4%	1.4%	0.0%	0.0%
Other	8.2%	10.1%	7.6%	6.7%	4.9%	13.3%	5.3%	3.7%

DAY VISITORS AVERAGED 6.3 HOURS ON CATALINA; CRUISE PASSENGERS LESS; WEEKEND MORE THAN WEEKDAY

Table 30 – Hours on Catalina Island (Day Visitors)

	Total	Residence			Day		Visitation		Travel Family Group
		LA Co.	Other So Cal	Other US	Day- (excl Cruise)	Day-Cruise Ships	W-end	W-Day	
Base: Day visitor to SCI	311	124	98	62	275	36	101	210	97
2 hours or less	2.5%	1.5%	4.2%	3.3%	1.4%	4.4%	2.0%	2.7%	2.3%
3-4 hours	20.9%	16.0%	26.8%	14.8%	4.6%	48.1%	6.2%	26.3%	28.5%
5-6 hours	36.7%	25.7%	35.9%	45.6%	34.3%	40.7%	25.8%	40.7%	34.3%
7-8 hours	23.5%	33.3%	17.4%	25.5%	33.6%	6.7%	33.1%	20.0%	19.3%
9-12 hours	15.8%	22.1%	15.7%	10.8%	25.3%	0.0%	31.1%	10.3%	14.8%
13+ hours	0.5%	1.4%	0.0%	0.0%	0.8%	0.0%	1.8%	0.0%	0.9%
Mean hours:	6.27	6.96	6.01	6.19	7.34	4.58	7.95	5.75	5.99

Spending

DAILY SPENDING OF \$127 PER-CAPITA, \$202 FOR LODGING IF OVERNIGHT

Spending Incidence

Incidence is shown on the table on the next slide.

- Overall 97% of visitor groups spent money on Catalina Island, a rate fairly consistent across segments.
- 85% of visitors spent on meals/snacks, 69% spent on beverages and 64% spent on shopping/gifts, the top three categories.
- As well, 29% of visitors spent on paid lodging.

Per-Capita Daily Spending

Per capita and aggregated visitor spending was detailed in the first section of this report. We show per-capita daily spending by various segments for comparison on the second next slide.

- The daily per-capita spending amount of \$39.17 for lodging is not room rate. Paid lodging guests reported their nightly lodging room rate averaged \$202, and \$193 specifically for hotels.

SPENDING INCIDENCE BY CATEGORY (PERCENT OF GROUPS SPENDING IN A CATEGORY)

Table 3I – Spending Incidence

Percent spending (incidence)	Total	Residence			Overnight or Day			Visitation		Travel Family Group
		LA Co.	Other So Cal	Other US	Hotel/ Inn	Day- (excl Cruise)	Day- Cruise Ships	W-end	W-day	
Base:	604	213	242	95	237	275	36	202	402	175
Total	97.2%	98.7%	95.4%	100.0%	100.0%	98.0%	91.9%	98.5%	96.7%	95.5%
Meals out/snacks	85.2%	91.5%	80.7%	84.4%	97.0%	95.0%	55.6%	93.8%	81.8%	74.8%
Drinks/beverages	68.5%	75.0%	62.9%	67.8%	78.3%	69.4%	65.2%	70.6%	67.6%	64.1%
Shopping/Gifts/Souvenirs/specialty items	63.8%	62.8%	57.9%	73.0%	63.5%	64.0%	77.8%	57.7%	66.3%	65.5%
Fees for activities, tours, passes equipment, etc.	34.0%	38.3%	32.0%	32.3%	39.3%	41.0%	25.2%	43.6%	30.2%	33.9%
Lodging	29.1%	28.7%	36.8%	17.4%	100.0%	0.0%	0.0%	36.1%	26.3%	24.9%
Transportation (ferry fares, cart rental, etc.)	29.1%	35.4%	24.3%	32.2%	28.9%	37.7%	21.5%	41.8%	23.9%	29.3%
Groceries/personal items/other	15.7%	17.0%	18.1%	13.3%	25.6%	8.2%	7.4%	14.4%	16.2%	16.5%
Museum/theater admission/ nightclub covers	8.7%	7.5%	9.4%	10.4%	15.3%	8.2%	0.0%	11.1%	7.8%	8.9%
Fine arts/home decor	2.9%	0.8%	2.5%	8.6%	1.8%	1.2%	5.2%	1.0%	3.7%	2.1%
Amenities like spa, grooming or health club	2.6%	3.9%	0.8%	5.7%	4.2%	2.0%	0.0%	1.5%	3.1%	1.2%

AVERAGE DAILY PER-CAPITA SPENDING

Table 32 – Average Daily Group Spending by Category

Mean spending per individual group	Total	Wave			Residence		Overnight or Day			Visitation		Travel Family Group	
		Spring	Summ.	Fall	LA Co.	Other So Cal	Other US	Hotel/ Inn	Day- (excl Cruise)	Day-Cruise Ships	W-end		W-Day
Base:	604	202	202	200	213	242	95	237	275	36	202	402	175
Total	126.79	131.06	137.26	111.94	125.12	137.04	101.76	194.10	91.66	66.39	139.35	121.89	98.99
Lodging	37.19	43.81	33.04	35.85	35.48	42.64	23.18	87.78	0.00	0.00	47.83	33.03	27.74
Meals out/snacks	29.86	28.58	34.94	25.54	31.34	31.39	24.51	38.51	29.02	9.97	32.15	28.96	22.26
Shopping/Gifts/Souvenirs/specialty items	20.42	22.04	19.15	20.36	15.55	21.92	20.09	23.55	17.57	31.64	17.02	21.74	14.65
Fees for activities, tours, passes equipment, etc.	14.08	13.87	18.41	9.66	15.27	14.63	10.58	16.25	18.32	7.47	15.54	13.51	11.27
Drinks/beverages	10.39	10.83	12.25	8.04	11.42	11.64	5.94	12.22	10.12	6.31	9.86	10.60	7.21
Transportation (ferry fares, cart rental, etc.)	7.86	5.93	10.91	6.29	9.60	7.27	8.85	5.69	13.20	10.44	11.71	6.36	9.85
Groceries/personal items/other	3.58	2.86	4.77	2.94	2.73	5.14	2.70	3.90	0.78	0.56	2.37	4.05	3.33
Amenities like spa, grooming or health club	1.91	1.30	1.87	2.50	3.03	0.96	3.60	3.87	1.54	0.00	1.28	2.16	0.90
Museum/theater admission/nightclub covers	1.00	1.41	1.18	0.46	0.60	0.65	1.70	1.97	0.70	0.00	1.36	0.86	1.11
Fine arts/home decor	0.50	0.43	0.76	0.29	0.10	0.79	0.62	0.35	0.40	0.01	0.22	0.61	0.67

Note: spending allocated to all visitor groups whether or not they spent in that category.

* Lodging spending is not daily rate but average lodging spending allocated across all groups, including Day visitors.

DAILY SPENDING OF \$127 PER-CAPITA, \$202 FOR LODGING IF OVERNIGHT

Spending Incidence

- Overall 97% of visitor groups spent money on Catalina Island, a rate fairly consistent across segments.
- 85% of visitors spent on meals/snacks, 69% spent on beverages and 64% spent on shopping/gifts, the top three categories.
- As well, 29% of visitors spent on paid lodging.

Per-Capita Daily Spending

Per capita and aggregated visitor spending is detailed in the first section of this report. We are showing per-capita daily spending by various segments for comparison as shown on the next slide.

- The daily per-capita spending amount of \$39.17 for lodging is not room rate. Paid lodging guests reported their nightly lodging room rate averaged \$202, and \$193 specifically for hotels.

Table 33 – Overnight Lodging Nightly Rate

	Total	Wave			Residence			Hotel/ Inn	Visitation		Travel Family Group
		Spring	Summ.	Fall	LA Co.	Other So Cal	Other US		W-end	W-Day	
Base: SCI paid lodging guest	271	95	82	94	80	136	32	237	91	180	71
Under \$100	8.8%	10.7%	8.4%	7.3%	6.4%	7.9%	17.9%	4.6%	10.4%	8.1%	5.7%
\$100 to \$149	19.2%	27.7%	4.9%	22.5%	19.7%	19.2%	19.0%	21.5%	12.5%	22.5%	13.0%
\$150 to \$199	34.3%	31.9%	32.0%	38.8%	25.9%	38.5%	34.8%	39.7%	33.7%	34.6%	36.9%
\$200 to \$249	15.9%	8.7%	23.4%	16.8%	18.5%	16.3%	6.3%	17.7%	16.8%	15.4%	17.8%
\$250 to \$299	6.2%	5.1%	9.8%	4.2%	11.1%	4.4%	6.3%	7.2%	7.6%	5.5%	6.8%
\$300 or more	15.6%	15.8%	21.5%	10.4%	18.4%	13.7%	15.7%	9.3%	18.9%	14.0%	19.7%
Mean rate (\$)	202.33	199.05	225.44	185.97	213.08	196.75	182.19	193.39	214.99	195.94	216.06

Trip Characteristics & Visitor Demographics

ONE-FIFTH ON AN ORGANIZED TOUR

- 19% of Catalina visitors were on some type of tour on this trip, thus 81% were not.
- More 27% of Other U.S. resident visitors were on a tour than Southern Californians; as well 24% of weekday visitors and 21% of those traveling as a family were groups with higher use of tours, versus only 3% of hotel guests.

Table 34 – On A Tour

	Total	Residence			Overnight or Day			Visitation		Travel Family Group
		LA Co.	Other So Cal	Other US	Hotel/ Inn	Day- (excl Cruise)	Day- Cruise Ships	W-end	W-Day	
Base:	604	213	242	95	237	275	36	202	402	175
No	80.8%	86.5%	87.9%	72.3%	96.3%	93.2%	37.8%	93.7%	75.6%	79.2%
Yes	19.2%	13.5%	12.1%	27.7%	3.7%	6.8%	62.2%	6.3%	24.4%	20.8%

TRAVELERS MAINLY COUPLES WITH SOME FAMILIES; FEW SOLO

- Nearly 44% of travel groups to Catalina Island were couples, while 26% were families with children and 6% extended generational families, and 11% were in a mixed group.
- More, 59% of Hotel guests versus 48% of weekend visitors were couples.

Table 35 – Travel Group Composition

	Total	Residence			Overnight or Day			Visitation		Travel Family Group
		LA Co.	Other So Cal	Other US	Hotel/ Inn	Day- (excl Cruise)	Day-Cruise Ships	W-end	W-Day	
Base:	604	213	242	95	237	275	36	202	402	175
A couple	43.8%	37.6%	47.7%	49.3%	59.1%	37.7%	33.3%	47.5%	42.4%	0.0%
A family group - parents and children	26.2%	30.4%	25.2%	24.0%	24.1%	27.6%	36.1%	25.5%	26.5%	81.1%
A group of friends or co-workers	10.5%	13.3%	8.6%	4.9%	5.1%	15.6%	11.1%	11.8%	10.0%	0.0%
Alone	6.9%	9.5%	4.3%	5.5%	4.6%	12.0%	0.0%	6.4%	7.1%	0.0%
Extended/multi generation family	6.1%	2.9%	8.3%	9.3%	2.1%	1.1%	13.9%	2.2%	7.6%	18.9%
A mixed group of family and friends	3.3%	3.8%	0.9%	6.1%	2.1%	3.3%	5.6%	3.3%	3.3%	0.0%
Other	3.2%	2.5%	5.0%	1.0%	3.0%	2.6%	0.0%	3.3%	3.1%	0.0%

ONE IN FIVE GROUPS INCLUDED CHILDREN

- Visitor travel groups averaged 2.84 persons this year.
- About one-fifth or 21% of groups contained someone under age 18.
 - This share was notably higher among Day Cruise Ship visitors at 36%.

Table 36 – Group Size & Visitors (groups) Traveling with Children

Mean number per respondent	Total	Residence			Overnight or Day			Visitation		Travel Family Group
		LA Co.	Other So Cal	Other US	Hotel/ Inn	Day- (excl Cruise)	Day-Cruise Ships	W-end	W-Day	
Base:	604	213	242	95	237	275	36	202	402	175
Total group	2.84	2.93	2.72	2.81	2.39	2.77	3.75	2.94	2.81	3.88
Under the age of 18	0.37	0.35	0.42	0.31	0.26	0.30	0.75	0.43	0.35	1.03
18 or over	2.47	2.58	2.31	2.50	2.14	2.47	3.00	2.51	2.46	2.85
Under the age of 18 (with others)	1.81	1.78	1.88	1.64	1.61	1.74	2.08	2.00	1.73	1.75
Adult only travel group	79.5%	80.4%	77.8%	81.0%	84.0%	83.0%	63.9%	78.6%	79.8%	41.0%
Traveling with children under 18	20.5%	19.6%	22.2%	19.0%	16.0%	17.0%	36.1%	21.4%	20.2%	59.0%

62% MARRIED/PARTNERED; 25% SINGLE
32% HAVE CHILDREN (UNDER AGE 18) AT HOME

Table 37 – Household Composition

	Total	Residence			Overnight or Day			Visitation		Travel Family Group
		LA Co.	Other So Cal	Other US	Hotel/ Inn	Day- (excl Cruise)	Day- Cruise Ships	W-end	W-Day	
Base:	604	213	242	95	237	275	36	202	402	175
Married/partnered without children under age 18 at home	35.2%	24.6%	43.6%	44.6%	36.9%	31.5%	37.0%	32.4%	36.3%	29.5%
Married/partnered with children under age 18 at home	26.7%	28.0%	22.6%	32.0%	24.2%	24.0%	38.5%	28.3%	26.1%	33.7%
Single adult without children under age 18 at home	20.4%	17.4%	23.5%	12.2%	16.9%	21.9%	16.3%	17.8%	21.5%	15.2%
Household with adult children over age 18 at home	8.0%	15.7%	4.6%	1.8%	10.2%	11.3%	3.0%	9.2%	7.6%	9.4%
Single adult with children under age 18 at home	3.2%	4.2%	2.3%	5.0%	5.1%	3.0%	3.0%	2.6%	3.4%	5.3%
Own or extended family with children under age 18 at home	1.7%	1.7%	1.9%	0.0%	1.6%	0.8%	2.2%	0.3%	2.3%	2.6%
Group of unrelated adults	1.7%	2.9%	0.8%	1.7%	2.8%	1.5%	0.0%	3.8%	0.8%	0.8%
Other	3.0%	5.6%	0.8%	2.7%	2.3%	6.0%	0.0%	5.6%	2.0%	3.5%

4% OVERALL IDENTIFIED AS LGBT

Table 38 – Sexual Orientation

	Total	Residence			Overnight or Day			Visitation		Travel Family Group
		LA Co.	Other So Cal	Other US	Hotel/ Inn	Day- (excl Cruise)	Day- Cruise Ships	W-end	W-Day	
Base:	604	213	242	95	237	275	36	202	402	175
Heterosexual	94.4%	92.5%	95.6%	97.0%	94.0%	91.4%	97.8%	90.6%	95.9%	93.3%
Gay male	1.1%	1.8%	0.5%	1.6%	1.4%	1.7%	0.0%	1.6%	0.8%	0.5%
Lesbian	1.0%	1.8%	0.8%	0.0%	0.9%	1.8%	0.0%	2.5%	0.4%	1.1%
Other	1.9%	2.3%	2.8%	0.0%	1.6%	2.2%	2.2%	2.9%	1.5%	2.4%
Refused	1.7%	1.6%	0.3%	1.4%	2.1%	2.9%	0.0%	2.4%	1.4%	2.7%

52% OF CATALINA ISLAND U.S. VISITORS IDENTIFY AS CAUCASIAN

This question was asked of U.S. resident visitors only.

- Of 48% non-Caucasian U.S. visitors, 30% identified as Hispanic/Latino, 8% as Asian-American and 6% as African-American.
- Los Angeles County resident visitors were the most diverse with only 33% Caucasian, and 40% Hispanic/Latino, as were Day Cruise ship passengers with 49% Hispanic/Latino and families with 37% Hispanic/Latinos.

Table 39 – Ethnicity

	Total	Residence			Overnight or Day			Visitation		Travel Family Group
		LA Co.	Other So Cal	Other US	Hotel/ Inn	Day- (excl Cruise)	Day- Cruise Ships	W-end	W-Day	
Base: US resident	587	213	242	95	232	266	36	199	388	172
Caucasian (non-Hispanic)	51.9%	33.3%	63.4%	70.7%	63.2%	45.6%	39.3%	42.3%	55.8%	47.5%
Hispanic/Latino	30.4%	40.3%	24.7%	17.4%	19.0%	29.6%	48.9%	31.7%	29.8%	37.1%
Asian-American	7.6%	12.0%	5.0%	2.1%	7.4%	10.1%	4.4%	11.5%	6.0%	7.8%
African-American	6.2%	9.7%	4.9%	4.3%	7.9%	8.9%	3.0%	8.5%	5.3%	3.5%
Pacific Islander	2.8%	3.3%	1.6%	0.9%	0.7%	3.4%	5.2%	2.9%	2.8%	0.4%
Native American	1.9%	0.0%	2.2%	0.5%	0.9%	0.0%	3.7%	0.0%	2.6%	1.7%
Other group	3.5%	3.6%	2.1%	4.1%	3.1%	4.2%	4.4%	5.4%	2.8%	4.6%
Prefer not to disclose	0.4%	0.3%	0.4%	0.6%	1.1%	0.3%	0.0%	0.3%	0.4%	0.0%

ADULT VISITORS AVERAGE AGE 44; 40% UNDER AGE 40, 39% AGE 50+

Table 40 – Respondent Age

	Total	Residence			Overnight or Day			Visitation		Travel Family Group
		LA Co.	Other So Cal	Other US	Hotel/ Inn	Day- (excl Cruise)	Day- Cruise Ships	W-end	W-Day	
Base: indicated age	600	212	241	94	236	272	36	199	401	174
18-29	20.3%	27.7%	16.1%	11.5%	18.6%	24.3%	19.3%	23.8%	18.9%	20.3%
30-39	19.2%	15.6%	18.4%	23.6%	22.0%	17.6%	24.4%	19.1%	19.2%	18.6%
40-49	21.3%	27.1%	19.7%	24.1%	16.8%	20.5%	30.4%	22.6%	20.8%	26.4%
50-59	22.2%	19.3%	23.6%	21.6%	23.9%	21.8%	13.3%	19.8%	23.2%	18.9%
60-69	11.6%	6.3%	12.9%	17.4%	13.5%	11.8%	5.2%	11.6%	11.6%	8.9%
70+	5.5%	4.0%	9.2%	1.8%	5.1%	4.0%	7.4%	3.1%	6.4%	7.0%
Median:	44.46	41.96	47.35	45.68	45.08	43.46	41.57	42.64	45.24	43.73

VISITORS REPORT \$87,100 ANNUAL MEDIAN HOUSEHOLD INCOME

- There are some differences between segments.
 - Highest median household income ranged from \$93,700 for visitors from Other Southern California and \$93,500 for cruise ship passengers.
- About 41% of the Total groups report median annual income of \$100,000+

Table 4I – Median Annual Household Income

	Total	Residence			Overnight or Day			Visitation		Travel Family Group
		LA Co.	Other So Cal	Other US	Hotel/ Inn	Day- (excl Cruise)	Day-Cruise Ships	W-end	W-Day	
Base: reported income	513	182	214	79	196	240	29	181	332	141
Under \$30,000	11.7%	12.4%	14.5%	4.5%	11.0%	13.8%	11.0%	11.8%	11.7%	12.3%
\$30,000 - \$49,999	9.0%	12.5%	6.6%	11.6%	8.7%	13.9%	3.7%	11.0%	8.2%	9.5%
\$50,000 - \$74,999	20.8%	24.3%	16.2%	20.9%	21.4%	20.9%	18.3%	19.6%	21.3%	18.6%
\$75,000 - \$99,999	17.6%	14.6%	17.0%	28.2%	16.1%	16.1%	22.9%	14.4%	19.0%	23.4%
\$100,000 - \$199,999	25.3%	23.1%	24.3%	23.5%	29.6%	24.5%	25.7%	30.3%	23.1%	17.3%
\$200,000 - \$500,000	13.5%	10.1%	19.1%	10.7%	12.3%	8.6%	18.3%	8.1%	15.9%	17.0%
Over \$500,000	2.1%	3.1%	2.3%	0.6%	1.1%	2.1%	0.0%	4.8%	0.9%	1.8%
Median Annual (\$)	87,054	76,417	93,684	86,560	88,980	77,225	93,500	88,207	86,676	85,217

RESPONDENT GENDER SKEWED 64% FEMALE

Table 42 – Gender

	Total	Residence			Overnight or Day			Visitation		Travel Family Group
		LA Co.	Other So Cal	Other US	Hotel/ Inn	Day- (excl Cruise)	Day- Cruise Ships	W-end	W-Day	
Base:	604	213	242	95	237	275	36	202	402	175
Female	63.9%	65.5%	59.0%	66.6%	61.7%	67.8%	65.9%	63.6%	64.0%	64.0%
Male	36.1%	34.5%	41.0%	33.4%	38.3%	32.2%	34.1%	36.4%	36.0%	36.0%

Note: this is the respondent gender only and may not reflect composition for all visitors.

CATALINA EXPERIENCED AS RELAXING, FUN, GOOD/GREAT & BEAUTIFUL

**Table 43 – Words Describing Catalina Island Experience
(1% or more)**

	Total	Residence			Overnight or Day			Visitation		Travel Family Group
		LA Co.	Other So Cal	Other US	Hotel/ Inn	Day- (excl Cruise)	Day- Cruise Ships	W-end	W-Day	
Base:	604	213	242	95	237	275	36	202	402	175
Relaxing	20.9%	23.0%	18.0%	12.3%	24.0%	16.2%	24.4%	22.5%	20.3%	13.9%
Fun	10.8%	13.9%	11.4%	5.2%	13.1%	11.5%	8.9%	14.4%	9.4%	13.6%
Good/ Great	8.6%	11.9%	5.9%	7.5%	7.4%	10.2%	6.7%	13.0%	6.9%	8.6%
Beautiful	8.0%	8.0%	5.3%	12.2%	5.6%	5.7%	8.9%	6.7%	8.5%	9.1%
Pleasant	5.0%	1.5%	10.3%	1.8%	3.2%	2.3%	7.4%	2.5%	6.0%	5.8%
Awesome	4.8%	5.3%	5.9%	1.8%	4.9%	5.5%	0.0%	4.6%	4.8%	6.2%
Amazing	3.9%	4.1%	2.6%	7.8%	2.6%	6.0%	3.0%	4.9%	3.5%	4.4%
Excellent	3.5%	4.6%	3.9%	0.8%	5.1%	2.7%	1.5%	4.4%	3.2%	1.9%
Enjoyable	2.7%	2.4%	1.6%	5.8%	1.2%	4.0%	3.0%	2.0%	2.9%	4.4%
Fantastic	2.5%	2.0%	2.2%	5.0%	3.4%	4.2%	0.0%	3.9%	1.9%	3.1%
Nice	2.4%	1.5%	3.6%	0.2%	2.5%	3.0%	2.2%	1.7%	2.7%	2.4%
Lovely	2.2%	2.1%	0.5%	7.0%	1.6%	1.4%	5.2%	1.9%	2.4%	0.5%
Wonderful	2.1%	1.2%	3.8%	0.7%	1.4%	4.1%	0.0%	1.7%	2.3%	1.2%
Peaceful	1.8%	2.3%	1.5%	2.5%	4.6%	1.7%	0.0%	1.5%	1.9%	0.7%
Pretty	1.3%	0.3%	3.0%	0.0%	0.0%	0.5%	4.4%	0.0%	1.8%	2.7%

Appendix

Research Methods

Interview Locations

Reading the Report Tables & Charts

METHODS FOR THE MULTI-PHASE STUDY

- The research method for this overall study is as follows:
 - 604 total face-to-face interviews, conducted in 3 seasonal waves of 200 each over a one year period, among *visitors* out and about at various Catalina Island locations/venues.
 - Analysis of Catalina Island hotel/inn market measured by annual and seasonal supply, demand, occupancy rate, average room rate and room sales revenue, and analysis of other lodging demand.
- A Catalina Island “Visitor” is defined as: Anyone residing outside Catalina Island visiting Catalina Island for any temporary purpose(s) other than for regular work or to attend school.

VARIED INTERVIEW LOCATIONS TO CAPTURE A REPRESENTATIVE SAMPLE

- The 604 on-site intercepts were conducted at highly frequented visitor locations, mainly Cabrillo Mole, Avalon Harbor and Avalon Crescent, as well as others as shown below.

Table 44 -- Interview Locations

	Total
Base:	604
Cabrillo Mole (Catalina Express/Flyer landing)	26.8%
Avalon Harbor/ Beaches	23.0%
Avalon - Crescent	21.0%
Avalon Pier/Dinghy Dock	9.9%
Tour Plaza	7.3%
Airport	4.5%
Descanso Beach	4.5%
Island Express Helipad	0.7%
Other location	2.3%

READING THE REPORT TABLES & CHARTS

- The table data are read vertically to determine the responses for each segment and horizontally to compare between segments.
- Each table in the report is headed with these columns:

Sample Table/Headings

	Total	Residence			Overnight or Day			Visitation		Travel Family Group
		LA Co.	Other So Cal	Other US	Hotel/ Inn	Day-(excl Cruise)	Day-Cruise Ships	W-end	W-Day	
Base:	604	213	242	95	237	275	36	202	402	175

- **Total:** all visitors (sample)
 - **Residence:** visitor residence/origin – either Los Angeles County, Southern California (excluding LA County), or Other US states (excluding California). Central/Northern California and International origin were excluded from the analysis due to insufficient sample size.
 - **Overnight or Day:** where and whether visitors lodged overnight – either lodging in a Catalina Island hotel or inn, or visiting Catalina Island for the day only excluding cruise passengers and only cruise passengers. Other/non-hotel lodging was excluded due to insufficient sample size.
 - **Visitation:** whether visitors came on weekend or on weekday (when interviewed)
 - **Family Travel Group:** those reporting traveling as a family or extended generation family:
- The bold numbers immediately below the column header are the “base” (i.e., number of) for each group.
 - Statistical differences between these groups are indicated by purple or light blue shading of a cell, indicating a result higher (purple) or lower (light blue) compared to the Wave Total.
 - The Total sample of 604 has an error factor of +/- 4% at the 95% confidence level.