

*Lauren Schlau
Consulting*

Profile of Catalina Island Visitors Wave 1 – Spring 2016



July 2016

Executive Summary

VISITOR RESEARCH SUPPORTS MARKETING & DESTINATION GOALS

- The Catalina Island Chamber of Commerce & Visitors Bureau (CICCVB) is a not-for-profit entity marketing Catalina Island to non-local leisure and business visitors and building the destination brand.
- To support its destination marketing and management efforts, CICCVB is conducting research to obtain a comprehensive and current visitor profile and economic impact data that includes:
 - ❑ seasonal and annual comprehensive **visitor profiles**
 - ❑ annual of **visitor volume** and **visitor spending** measures
 - ❑ annual **fiscal (tax) impacts**
 - ❑ visitor-supported local **employment**
- This report presents the **Spring 2016** (i.e. March - June) visitor profile, the first of three seasonal profile reports on Catalina Island visitor groups (not individuals).
- Lauren Schlau Consulting, a tourism industry market research specialist, is conducting the visitor study.

EXECUTIVE SUMMARY — I

Catalina Island Overall 2016 Spring Visitor - Summary

Spring visitors are mainly Southern Californians, specifically Los Angelinos, with fewer from other parts of the state and country, and even less from international markets. Oddly, most were first-time visitors (in three years). Half stayed overnight on the island, with most using local hotels. They tended to be couples in their mid-40's, with \$80,000+ income. They averaged \$279 spending daily per-group.

Residence

- 78% of Spring visitor groups were Californians, with 20% from Other US areas (excluding California), and 2.5% International.
 - Of the Californians, 86% were from Southern California overall, with nearly half of those, 40%, from the greater Los Angeles area, thus indicating a very Southern Californian visitor profile.

New vs. Repeat, Main Destination

- Despite the high share of visitors originating in-state, 73% were first-time (in three years), thus only 27% had visited Catalina Island in the past three years.
 - Repeat visitors averaged 3.3 trips to Catalina Island in the last three years, about one per year.
- 78% named Catalina Island as their main destination on this trip.

EXECUTIVE SUMMARY – 2

Arrival Mode

- 9 out of 10 visitors arrived on Catalina Island by ferry boat

Purposes, Activities, Venues

- Over half, 53% were visiting Catalina Island for vacation, while 28% were celebrating an event
- While on the island, main activities included eating out, shopping, sightseeing, going to the beach, renting golf carts, and socializing.
- Visitors mainly frequented Avalon Crescent retail area, Avalon Harbor and the Catalina Pier areas.

Revisit Intent

- 6 in 10 visitors indicated they are likely to revisit the island in the next year.

EXECUTIVE SUMMARY – 3

Overnight Stays

- Half of Spring visitor groups stayed overnight in Catalina Island, while 19% stayed overnight elsewhere in the Los Angeles area.
- Of *all* visitors, 40% stayed in Catalina Island hotels/motels.
- Of *overnight* Catalina Island visitors, 81% stayed in Catalina Island hotels/motels while 19% stayed in other types of lodging.
- Catalina Island overnigheters averaged 1.9 nights on the island.
- Day (only) visitors spent 6.8 hours on average on the island.

Spending

- Nearly all groups, 99% reported spending money on Catalina Island.
- Visitor group daily spending in the city averaged \$279 overall, while per-capita spending averaged \$122 daily per visitor.

EXECUTIVE SUMMARY – 4

Spring Visitor Demographics

- Visitor groups were mainly couples with some, but fewer families and friends groups.
 - 11% of travel groups included children (under age 18)
- Average group size was 2.6 persons
- Most, 61% married/partnered; 27% single; 28% with children under age 18 at home
- Overall, respondents averaged mid-late 40's of age
- Median annual household income of \$80,300

Detailed Findings

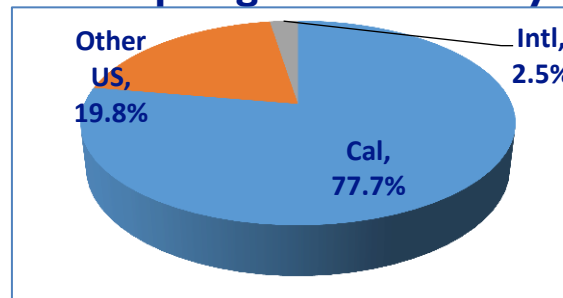
77% OF SPRING VISITOR GROUPS FROM CALIFORNIA

- Virtually all, 98% of Catalina Island (CI) Spring visitors, were from the United States, and more specifically 77% were Californians with 20% from Other States.
- Notably, 83% of Hotel guests were Californians while more Day visitors, 26% were from out of state.

Table I – Share Domestic/International Visitors

	Spring 2016	Overnight or Day		Age		
		Hotel	Day Only	<39	40-59	60+
Base:	202	81	102	73	81	46
California	77.7%	82.7%	71.6%	80.8%	76.5%	76.1%
Other US	19.8%	16.0%	25.5%	13.7%	23.5%	21.7%
International	2.5%	1.2%	2.9%	5.5%	0.0%	2.2%

Exhibit I – Spring 2016 Share by Origin



CALIFORNIA TOP U.S. FEEDER; MORE FROM SOUTHERN THAN NORTHERN CALIFORNIA

- California accounted for 80% of U.S. resident visitors, with Arizona a distant second at 4% and others at 1.5% or lower as listed below.
- The top 10 states accounted for 94% of U.S. share.
- Among Californians, Central Los Angeles was the highest feeder at 28%, with Inland Empire at 18% and Orange County at 17%.
 - With the Los Angeles Valleys at 12%, Los Angeles County accounted for 40% of the state's share.
- Notably few, 14% were from beyond Southern California

Table 2 – Top Feeder States (1%+)

	Spring 2016	Overnight or Day		Age		
		Hotel	Day	<39	40-59	60+
Base: US resident	197	80	99	69	81	45
California	79.7%	83.8%	73.7%	85.5%	76.5%	77.8%
Arizona	3.6%	2.5%	5.1%	4.3%	2.5%	4.4%
Illinois	1.5%	0.0%	3.0%	4.3%	0.0%	0.0%
Minnesota	1.5%	2.5%	1.0%	1.4%	2.5%	0.0%
New York	1.5%	2.5%	1.0%	2.9%	1.2%	0.0%
Oregon	1.5%	1.3%	2.0%	0.0%	1.2%	4.4%
Washington	1.5%	1.3%	2.0%	1.4%	1.2%	2.2%
Georgia	1.0%	1.3%	1.0%	0.0%	1.2%	2.2%
Missouri	1.0%	0.0%	2.0%	0.0%	1.2%	2.2%
Ohio	1.0%	1.3%	1.0%	0.0%	2.5%	0.0%
Top Ten	93.8%	96.5%	91.8%	99.8%	90.0%	93.2%

Table 3 – California Feeder Areas

	Spring 2016	Overnight or Day	
		Hotel	Day Only
Base: CA resident	157	67	73
Central LA	28.0%	19.4%	39.7%
San Bernardino-Riverside	17.8%	25.4%	12.3%
Orange County	17.2%	16.4%	17.8%
LA Valley Areas	11.5%	7.5%	13.7%
San Diego	11.5%	14.9%	8.2%
Central Coast	4.5%	9.0%	0.0%
Bakersfield/ Mojave	3.8%	3.0%	2.7%
Oakland/East Bay	1.9%	1.5%	2.7%
Sacramento Area	1.9%	3.0%	0.0%
San Joaquin Valley/Stockton	0.6%	0.0%	1.4%
San Francisco	0.6%	0.0%	0.0%
Northern California	0.6%	0.0%	1.4%

HIGH FIRST-TIME VISITATION THOUGH MOST RESIDE IN THE REGION

- Given the high share of California residents it seems surprising that 73% were first-time visitors to Catalina Island (in past three years), while conversely 27% were repeat visitors over that period. Even among just Southern Californians, 65% were first-timer visitors in the last three years.
- All Spring visitors averaged .9 visits to Catalina Island in the past three years.
- Repeat visitors averaged 3.2 trips to Catalina Island in three years.

Table 4 – Visited Catalina Island in Past 3 Years

	Spring 2016	Residence		Overnight or Day		Age		
		So Cal	Other US	Hotel	Day	<39	40-59	60+
Base:	202	78	38	81	102	73	81	46
No - First visit	72.8%	65.4%	94.7%	77.8%	72.5%	80.8%	67.9%	69.6%
Visited before	27.2%	34.6%	5.3%	22.2%	27.5%	19.2%	32.1%	30.4%
Number of Visits (last 3 yrs.)								
None	72.8%	65.4%	94.7%	77.8%	72.5%	80.8%	67.9%	69.6%
1 time	9.4%	12.8%	2.6%	6.2%	10.8%	8.2%	9.9%	10.9%
2-3 times	9.9%	11.5%	2.6%	9.9%	9.8%	4.1%	13.6%	10.9%
4-6 times	3.5%	3.8%	0.0%	2.5%	2.9%	1.4%	4.9%	4.3%
7-10 times	2.5%	5.1%	0.0%	2.5%	1.0%	2.7%	2.5%	2.2%
11+ times	2.0%	1.3%	0.0%	1.2%	2.9%	2.7%	1.2%	2.2%
Mean (all visitors):	0.90	1.15	0.08	0.77	0.92	0.90	0.90	0.91
Mean (repeat only):	3.29	3.33	1.50	3.44	3.36	4.71	2.81	3.00

INTERNET/TRAVEL WEBSITES & REFERRALS

TOP PLANNING INFORMATION SOURCES

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

- 98% used a source for Catalina Island information when planning this trip.
- 55% used internet sources, with 41% using a general travel website and 23% relying on referrals from family or friends.
- Far more Hotel guests, 64% used Internet sources.

INTERNET & REFERRAL TOP CI INFORMATION SOURCES

Table 5 – Planning Sources for Catalina Island Information

	Spring 2016	Residence		Overnight or Day		Age		
		So Cal	Other US	Hotel	Day	<39	40-59	60+
Base:	202	78	38	81	102	73	81	46
ANY INTERNET SOURCE	54.5%	57.7%	52.6%	64.2%	50.0%	53.4%	59.3%	47.8%
General travel website/search like Travelocity, etc.	41.1%	43.6%	44.7%	51.9%	35.3%	37.0%	48.1%	34.8%
Family member/friend	22.8%	15.4%	28.9%	14.8%	25.5%	24.7%	21.0%	23.9%
Own experience/been here before	15.8%	20.5%	5.3%	17.3%	13.7%	6.8%	14.8%	30.4%
Catalina Express/Flyer website	10.4%	6.4%	5.3%	7.4%	13.7%	16.4%	6.2%	8.7%
Catalina Island Visitor Bureau web, mobile or app	5.4%	5.1%	13.2%	11.1%	2.0%	6.8%	3.7%	6.5%
Interactive website like Yelp or Trip Advisor	4.0%	7.7%	0.0%	6.2%	2.0%	2.7%	4.9%	2.2%
Auto Club or retail guide books	1.5%	2.6%	2.6%	2.5%	1.0%	0.0%	2.5%	2.2%
Visit California Visitor Guide	1.0%	0.0%	2.6%	2.5%	0.0%	1.4%	1.2%	0.0%
Catalina Island Visitor Bureau Visitor Guide	0.5%	0.0%	0.0%	0.0%	1.0%	1.4%	0.0%	0.0%
Travel service company info or promotion	0.5%	0.0%	0.0%	1.2%	0.0%	0.0%	0.0%	2.2%
Hotel	0.5%	1.3%	0.0%	1.2%	0.0%	1.4%	0.0%	0.0%
Newspaper or magazine	0.5%	0.0%	0.0%	0.0%	1.0%	0.0%	0.0%	2.2%
Tour Operator	0.5%	0.0%	2.6%	0.0%	1.0%	1.4%	0.0%	0.0%
Other	10.4%	7.7%	15.8%	4.9%	13.7%	12.3%	11.1%	6.5%
None	2.0%	2.6%	0.0%	0.0%	3.9%	4.1%	0.0%	2.2%

ON ISLAND, HOTELS, INTERNET PAST VISIT & MAP MOST-USED INFORMATION SOURCES

Sources for Catalina Island information once on the island are discussed below and shown on the next slide.

- Overall 85% of Spring visitors sought information Catalina Island once in the destination.
- Interestingly, 18% of the total relied on the hotel concierge or hotel rack brochures, especially Hotel guests, while 18% used the Internet.
- Another 16% relied on past experience, especially those over age 60, and 13% consulted the Catalina Island map, especially those under age 39.

INFORMATION SOURCES ON ISLAND

Table 6 – Information Sources Used on Catalina Island

	Spring 2016	Residence		Overnight or Day		Age		
		So Cal	Other US	Hotel	Day	<39	40-59	60+
Base:	202	78	38	81	102	73	81	46
Hotel/ concierge/ hotel rack brochures	18.3%	21.8%	13.2%	28.4%	12.7%	13.7%	21.0%	21.7%
ANY INTERNET SOURCE	18.3%	19.2%	23.7%	32.1%	7.8%	23.3%	18.5%	10.9%
Own experience/been here before	16.3%	16.7%	5.3%	16.0%	14.7%	6.8%	17.3%	28.3%
Catalina island Map	12.9%	12.8%	15.8%	11.1%	14.7%	19.2%	9.9%	8.7%
Family member/friend	10.4%	2.6%	18.4%	6.2%	7.8%	8.2%	12.3%	10.9%
Catalina Island visitor center	9.4%	10.3%	5.3%	13.6%	6.9%	8.2%	9.9%	10.9%
Local friends/family	9.4%	11.5%	2.6%	11.1%	6.9%	4.1%	13.6%	8.7%
General Travel search, website, or app	6.9%	6.4%	7.9%	11.1%	4.9%	9.6%	8.6%	0.0%
Catalina Express Magazine	6.4%	6.4%	13.2%	7.4%	6.9%	4.1%	8.6%	6.5%
Catalina Island Visitor Bureau Visitor Guide	4.5%	2.6%	5.3%	4.9%	4.9%	6.8%	3.7%	2.2%
Interactive website or app	4.0%	5.1%	7.9%	7.4%	1.0%	5.5%	2.5%	4.3%
Mobile site or app for a specific attraction/activity here	3.5%	5.1%	0.0%	4.9%	1.0%	4.1%	4.9%	0.0%
Catalina Island Visitor Bureau web, mobile or app	3.0%	2.6%	5.3%	7.4%	0.0%	4.1%	1.2%	4.3%
Visit California web site	1.5%	1.3%	2.6%	2.5%	1.0%	1.4%	1.2%	2.2%
Visit California Visitor Guide	1.0%	1.3%	2.6%	1.2%	1.0%	2.7%	0.0%	0.0%
Local newspaper or magazine	0.5%	1.3%	0.0%	0.0%	1.0%	0.0%	0.0%	2.2%
Retail Guide books/Auto Club	0.5%	0.0%	0.0%	0.0%	1.0%	0.0%	1.2%	0.0%
Tour Operator	0.5%	0.0%	0.0%	1.2%	0.0%	0.0%	0.0%	2.2%
Other	8.9%	6.4%	18.4%	8.6%	9.8%	9.6%	9.9%	6.5%
None	14.9%	19.2%	15.8%	8.6%	22.5%	21.9%	11.1%	10.9%

GOOGLE MORE USED INTERNET SOURCE, THEN FERRY WEBSITES

- Among those using any internet for planning or in the area, 39% used a Google search while 23% used a ferry express website.
- Another 18% used an interactive website and 12% went to the Catalina Island Visitor Bureau website/app.

Table 7 – Internet Sources Used

	Spring 2016	Residence		Overnight or Day		Age		
		So Cal	Other US	Hotel	Day	<39	40-59	60+
Base: Used internet	125	51	22	61	56	48	52	24
Google search engine	39.2%	35.3%	59.1%	42.6%	37.5%	43.8%	32.7%	45.8%
Catalina Express/Flyer website	23.2%	13.7%	18.2%	18.0%	30.4%	27.1%	19.2%	25.0%
Trip Advisor, Yelp/interactive travel site	17.6%	25.5%	9.1%	24.6%	8.9%	16.7%	15.4%	20.8%
Catalina Island Visitor Bureau web/mobile/app	12.0%	7.8%	22.7%	16.4%	7.1%	10.4%	9.6%	20.8%
Travel website, e.g. expedia, travelocity	11.2%	15.7%	9.1%	14.8%	7.1%	6.3%	19.2%	4.2%
Other search engine	9.6%	11.8%	9.1%	9.8%	8.9%	6.3%	11.5%	12.5%
Other internet or app based resource	9.6%	13.7%	4.5%	11.5%	7.1%	10.4%	9.6%	8.3%
Facebook	1.6%	2.0%	4.5%	1.6%	1.8%	4.2%	0.0%	0.0%
Any Mobile site or app	1.6%	2.0%	4.5%	1.6%	1.8%	4.2%	0.0%	0.0%

CI MAIN DESTINATION FOR $\frac{3}{4}$, FAR MORE AMONG CALIFORNIANS & HOTEL GUESTS

- Catalina Island was named the main trip destination by 78% overall.
 - It was named by 91% of Southern Californians and 86% of Hotel guests.
- Not surprisingly, Catalina Island was the main destination for only 26% of Other US visitors with 34% naming Los Angeles as well as other areas as listed below. This is expected as generally the farther visitors' origin the more they tend to visit multiple places.

Table 8 – Main Trip Destination (>2%)

	Spring 2016	Residence		Overnight or Day		Age		
		So Cal	Other US	Hotel	Day	<39	40-59	60+
Base:	202	78	38	81	102	73	81	46
Catalina Island	77.7%	91.0%	26.3%	86.4%	67.6%	82.2%	79.0%	69.6%
Los Angeles area	8.4%	0.0%	34.2%	6.2%	11.8%	5.5%	9.9%	8.7%
Southern California areas (non LA, Santa Barbara to San Diego)	6.4%	0.0%	26.3%	4.9%	7.8%	4.1%	3.7%	15.2%
Mexico	5.4%	7.7%	10.5%	0.0%	10.8%	5.5%	7.4%	2.2%
California and/or other Western States	1.0%	0.0%	2.6%	1.2%	1.0%	1.4%	0.0%	2.2%
Other California (SFO, No. Cal, etc.)	0.5%	0.0%	0.0%	0.0%	1.0%	0.0%	0.0%	2.2%
All other areas	0.5%	1.3%	0.0%	1.2%	0.0%	1.4%	0.0%	0.0%

NEARLY ALL NAMED C I THEIR MAIN OR OTHER TRIP DESTINATION

Table 9 – All Destinations on Trip (>10%)

	Spring 2016	Residence		Overnight or Day		Age		
		So Cal	Other US	Hotel	Day	<39	40-59	60+
Base:	202	78	38	81	102	73	81	46
Catalina Island	98.0%	97.4%	94.7%	98.8%	97.1%	94.5%	100.0%	100.0%
Los Angeles area	18.8%	10.3%	60.5%	13.6%	23.5%	20.5%	16.0%	19.6%
Southern California areas (non LA, Santa Barbara to San Diego)	11.9%	2.6%	42.1%	9.9%	14.7%	8.2%	9.9%	21.7%
Mexico	5.9%	7.7%	13.2%	0.0%	11.8%	6.8%	7.4%	2.2%
Other California (SFO, No. Cal, etc.)	3.5%	0.0%	13.2%	2.5%	4.9%	2.7%	2.5%	6.5%
California and/or other Western States	1.0%	0.0%	2.6%	1.2%	1.0%	1.4%	0.0%	2.2%
USA (California plus other areas)	0.5%	0.0%	0.0%	0.0%	1.0%	0.0%	0.0%	2.2%
All other areas	1.0%	2.6%	0.0%	1.2%	1.0%	2.7%	0.0%	0.0%

NON-RESIDENT VISITORS FLEW OR DROVE INTO SO CAL REGION

- Again 66% are Southern California residents (thus already in the region).
- For the 34% who were visitors, 16% overall arrived into the region by air. However 68% of those from Other US areas flew here.
- Another 14% drove; 13% by personal vehicle and 1.5% by rental car.

Table 10 – Transportation into Los Angeles Region

	Spring 2016	Residence		Overnight or Day		Age		
		So Cal	Other US	Hotel	Day	<39	40-59	60+
Base:	202	78	38	81	102	73	81	46
Commercial airline	16.3%	0.0%	68.4%	16.0%	18.6%	12.3%	18.5%	17.4%
Personal vehicle	12.9%	12.8%	21.1%	12.3%	12.7%	9.6%	13.6%	15.2%
Rental vehicle	1.5%	0.0%	5.3%	0.0%	2.9%	1.4%	1.2%	2.2%
Cruise ship	1.5%	2.6%	2.6%	1.2%	2.0%	4.1%	0.0%	0.0%
Public bus/Greyhound	1.0%	0.0%	2.6%	0.0%	1.0%	1.4%	0.0%	2.2%
RV/motorhome	0.5%	1.3%	0.0%	0.0%	1.0%	0.0%	0.0%	2.2%
None (SC resident)	66.3%	83.3%	0.0%	70.4%	61.8%	71.2%	66.7%	60.9%

9 OF 10 VISITORS TOOK A FERRY TO REACH CATALINA ISLAND

- To reach Catalina Island once in the region, the vast majority, 92% took a Catalina Island ferry, while 6% came on a cruise ship tender.

Table II – Transportation to Arrive on Catalina Island

	Spring 2016	Residence		Overnight or Day		Age		
		So Cal	Other US	Hotel	Day	<39	40-59	60+
Base:	202	78	38	81	102	73	81	46
Catalina Express or Catalina Flyer ferry	91.6%	88.5%	86.8%	100.0%	87.3%	91.8%	90.1%	93.5%
Cruise ship (tender)	5.9%	7.7%	13.2%	0.0%	11.8%	6.8%	7.4%	2.2%
Private/charter yacht or boat	1.0%	2.6%	0.0%	0.0%	0.0%	0.0%	2.5%	0.0%
Helicopter	1.0%	0.0%	0.0%	0.0%	1.0%	1.4%	0.0%	2.2%
Private plane/seaplane	0.5%	1.3%	0.0%	0.0%	0.0%	0.0%	0.0%	2.2%

LEISURE/PLEASURE MAIN PURPOSE ON CATALINA ISLAND, ESPECIALLY OTHER US

- Overall 53% came to Catalina Island for leisure/vacation as their main purpose and another 28% were here for a celebration, the top two reasons.
- More from other states, 68%, and 74% of those over age 60 were vacationing. And while 41% of those under age 39 were on vacation, nearly as many, 36% were celebrating.

Table 12 – Main Reason for Visiting Catalina Island

	Spring 2016	Residence		Overnight or Day		Age		
		So Cal	Other US	Hotel	Day	<39	40-59	60+
Base:	202	78	38	81	102	73	81	46
Vacation/pleasure/to visit	52.5%	52.6%	68.4%	59.3%	50.0%	41.1%	50.6%	73.9%
Celebration: anniversary/birthday	27.7%	33.3%	2.6%	29.6%	29.4%	35.6%	27.2%	15.2%
Sightseeing/explore the area	9.9%	3.8%	23.7%	3.7%	15.7%	15.1%	7.4%	6.5%
Outdoor or water recreation	3.0%	3.8%	0.0%	3.7%	1.0%	2.7%	3.7%	2.2%
Conduct business	2.5%	1.3%	0.0%	1.2%	2.9%	1.4%	3.7%	2.2%
Special event	2.0%	3.8%	0.0%	1.2%	0.0%	1.4%	3.7%	0.0%
Visit relatives/friends/personal or social visit	2.0%	1.3%	2.6%	1.2%	1.0%	2.7%	2.5%	0.0%
Other	0.5%	0.0%	2.6%	0.0%	0.0%	0.0%	1.2%	0.0%

LEISURE/PLEASURE MAIN PURPOSE IN CATALINA ISLAND, ESPECIALLY FOR INT'L.

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

- Overall 62% were in Catalina Island for leisure/vacation as their main and other purpose/reason, while 33% came for a celebration.
- More Other U.S. visitors 82%, and 78% of those over age 60 came for or while on vacation.

Table 13 – All Reason/Purposes for Visiting Catalina Island

	Spring 2016	Residence		Overnight or Day		Age		
		So Cal	Other US	Hotel	Day	<39	40-59	60+
Base:	202	78	38	81	102	73	81	46
Vacation/pleasure/to visit	61.9%	62.8%	81.6%	69.1%	57.8%	57.5%	56.8%	78.3%
Celebration: anniversary/birthday	33.2%	38.5%	2.6%	35.8%	34.3%	41.1%	30.9%	23.9%
Sightseeing/explore the area	15.8%	12.8%	28.9%	9.9%	20.6%	24.7%	9.9%	13.0%
Outdoor or water recreation	5.4%	9.0%	2.6%	4.9%	2.9%	6.8%	6.2%	2.2%
Visit relatives/friends/personal or social visit	3.5%	2.6%	2.6%	1.2%	2.0%	4.1%	3.7%	2.2%
Special event	3.0%	5.1%	2.6%	3.7%	0.0%	2.7%	4.9%	0.0%
Conduct business	2.5%	1.3%	0.0%	1.2%	2.9%	1.4%	3.7%	2.2%
Combining business or meeting and pleasure	0.5%	0.0%	2.6%	0.0%	1.0%	0.0%	0.0%	2.2%
Other	2.0%	1.3%	5.3%	0.0%	2.9%	2.7%	2.5%	0.0%

MOST VISITORS ATE IN RESTAURANTS, SHOPPED & EXPLORED THE ISLAND

- As shown on the next slide, 99.5% of visitor groups reported doing activities in Catalina Island.
- 79% ate in local restaurants, 54% shopped and 39% were sightseeing/exploring, the top three activities.
 - While the magnitude varies somewhat by segment, these are the top three activities for most segments.
- Another 26% went to the beach, 25% rented golf carts, 22% socialized with friends/family, and just over 19% did water activities.
- Of note, much higher percentages of those under age 39 did various outdoor activities suggesting their visit motivations may be different than other segments.

ALL VISITORS DID ACTIVITIES – MOST EXPLORED & ATE IN RESTAURANTS

Table 14 – Catalina Island Activities

	Spring 2016	Residence		Overnight or Day		Age		
		So Cal	Other US	Hotel	Day	<39	40-59	60+
Base:	202	78	38	81	102	73	81	46
Eat in restaurants	79.2%	80.8%	71.1%	84.0%	75.5%	76.7%	80.2%	82.6%
Shopping	54.0%	53.8%	57.9%	59.3%	52.0%	46.6%	58.0%	60.9%
Sightsee/explore the area	38.6%	37.2%	55.3%	45.7%	35.3%	42.5%	30.9%	45.7%
Go to the beach	25.7%	28.2%	23.7%	28.4%	19.6%	32.9%	29.6%	6.5%
Golf Cart rental or tour	25.2%	29.5%	23.7%	33.3%	19.6%	23.3%	30.9%	19.6%
Just visit/socialize	21.8%	32.1%	13.2%	22.2%	22.5%	21.9%	16.0%	32.6%
Water activities - swim, snorkel, kayak, etc.	19.3%	25.6%	7.9%	24.7%	15.7%	28.8%	14.8%	8.7%
Visit art museum/gallery	12.4%	10.3%	2.6%	17.3%	8.8%	12.3%	8.6%	19.6%
Hiking	11.4%	11.5%	13.2%	8.6%	7.8%	21.9%	7.4%	0.0%
Biking/bike tour	9.4%	11.5%	2.6%	9.9%	5.9%	17.8%	7.4%	0.0%
Parasailing	8.4%	9.0%	7.9%	12.3%	5.9%	15.1%	7.4%	0.0%
Zip-lining	6.9%	9.0%	5.3%	13.6%	2.0%	11.0%	6.2%	2.2%
See historic or architectural sites	6.9%	7.7%	10.5%	9.9%	4.9%	12.3%	3.7%	4.3%
Hummer/Jeep tour	5.0%	3.8%	7.9%	9.9%	2.0%	2.7%	3.7%	10.9%
Walking tour	4.5%	3.8%	5.3%	3.7%	3.9%	1.4%	8.6%	2.2%
Camping	3.0%	3.8%	0.0%	0.0%	0.0%	4.1%	3.7%	0.0%
Attend a special event/concert	1.0%	1.3%	0.0%	1.2%	1.0%	1.4%	1.2%	0.0%
Fishing	1.0%	1.3%	0.0%	1.2%	1.0%	1.4%	0.0%	0.0%
Golfing	1.0%	1.3%	0.0%	1.2%	1.0%	1.4%	0.0%	2.2%
Other area activities/amusements	28.2%	32.1%	21.1%	37.0%	18.6%	23.3%	30.9%	30.4%
None of the above	0.5%	0.0%	0.0%	0.0%	1.0%	0.0%	1.2%	0.0%

AVALON RETAIL AREA, HARBOR & CATALINA PIER TOP VENUES VISITED

- Nearly 70% each visited the Avalon retail/village area, the Harbor and Catalina Pier, by far the top three venues.
- Of note, far more hotel guests than other segments visited venues as shown below.

Table 15 – Catalina Island Venues/Areas Visited

	Spring 2016	Residence		Overnight or Day		Age		
		So Cal	Other US	Hotel	Day	<39	40-59	60+
Base:	202	78	38	81	102	73	81	46
Avalon - retail district	69.8%	67.9%	81.6%	72.8%	69.6%	53.4%	79.0%	82.6%
Avalon - harbor area	68.8%	75.6%	60.5%	76.5%	64.7%	63.0%	66.7%	80.4%
Catalina Pier/Visitor Center	65.8%	64.1%	65.8%	77.8%	57.8%	63.0%	69.1%	63.0%
Descanso Beach	35.6%	32.1%	34.2%	46.9%	26.5%	32.9%	37.0%	37.0%
Catalina Island Museum	25.7%	25.6%	23.7%	33.3%	21.6%	28.8%	19.8%	32.6%
Wrigley Gardens	19.3%	12.8%	15.8%	18.5%	16.7%	23.3%	18.5%	15.2%
Island Interior/Conservancy areas	15.3%	15.4%	18.4%	22.2%	6.9%	13.7%	11.1%	21.7%
Two Harbors	3.0%	3.8%	0.0%	3.7%	1.0%	4.1%	2.5%	2.2%
Wrigley Institute	2.0%	1.3%	2.6%	3.7%	1.0%	1.4%	2.5%	2.2%
Catalina Sea Camp/other camps	1.5%	1.3%	2.6%	1.2%	0.0%	0.0%	3.7%	0.0%
Parsons Landing area/State Park	1.0%	1.3%	0.0%	0.0%	1.0%	1.4%	1.2%	0.0%
Long Point area	0.5%	0.0%	0.0%	1.2%	0.0%	1.4%	0.0%	0.0%
Other	6.9%	5.1%	7.9%	4.9%	5.9%	2.7%	12.3%	4.3%
None of the above	1.5%	1.3%	2.6%	2.5%	0.0%	1.4%	1.2%	2.2%

FAIRLY STRONG INTENTION TO REVISIT CATALINA ISLAND NEXT YEAR

- Overall 61% of Spring visitors indicated they are highly or somewhat likely to return to the island in the next year.
 - The overall mean rating is 3.5 (out of 5), in the “somewhat likely” range
- Not surprisingly, likely due to proximity, somewhat more So. Californians, 65% are likely to return, as was 71% of those under age 39.
 - Their mean ratings are 3.7 and 3.9 respectively, the highest of any segments.

Table 16 – Likelihood/Intention to Return to Catalina Island

Intention to return to CI within a year	Spring 2016	Residence		Overnight or Day		Age		
		So Cal	Other US	Hotel	Day	<39	40-59	60+
Base:	202	78	38	81	102	73	81	46
5. Highly likely	37.1%	39.7%	13.2%	35.8%	36.3%	42.5%	39.5%	23.9%
4. Somewhat likely	24.3%	25.6%	10.5%	23.5%	24.5%	28.8%	22.2%	21.7%
Highly + somewhat likely	61.4%	65.4%	23.7%	59.3%	60.8%	71.2%	61.7%	45.7%
3. Neutral/unsure	8.4%	7.7%	7.9%	4.9%	10.8%	9.6%	4.9%	10.9%
2. Somewhat unlikely	13.9%	17.9%	15.8%	16.0%	11.8%	15.1%	12.3%	15.2%
1. Highly/very unlikely	16.3%	9.0%	52.6%	19.8%	16.7%	4.1%	21.0%	28.3%
Mean rating	3.5	3.7	2.2	3.4	3.5	3.9	3.5	3.0

Overnight Lodging

HALF STAYED OVERNIGHT ON CATALINA ISLAND THIS SPRING

- Overall 71% of Catalina Island Spring visitors stayed overnight (somewhere) on this trip. thus 29% were Day-only trip takers.
- Nearly 50% stayed overnight on Catalina Island, thus, conversely 50% were Catalina Island Day visitors.
 - By residence, perhaps surprisingly, far more of Southern Californians stayed on Catalina 64%, versus only 34% of Other US visitors.
 - By age, there is a slight difference; while 52% of visitors age 39+ stayed on Catalina, 43% of those under age 39 did so.
- 19% of visitors stayed overnight in the LA area (rather than or in addition to Catalina Island), and 19% stayed in other locations on this trip.

Table 17 – Percent of Visitors Staying Overnight on Trip

Percent staying overnight	Spring 2016	Residence		Overnight or Day		Age		
		So Cal	Other US	Hotel	Day	<39	40-59	60+
Base:	202	78	38	81	102	73	81	46
Total	70.8%	78.2%	97.4%	100.0%	42.2%	63.0%	74.1%	76.1%
Nights on Catalina Island	49.5%	64.1%	34.2%	100.0%	0.0%	42.5%	54.3%	52.2%
Nights in Los Angeles area (excl. Catalina)	19.3%	9.0%	60.5%	14.8%	24.5%	17.8%	16.0%	26.1%
Nights in all other locations/destinations	18.8%	11.5%	55.3%	11.1%	27.5%	16.4%	18.5%	21.7%

OVERNIGHT VISITORS STAYED ABOUT 2 NIGHTS ON CATALINA ISLAND

- All Catalina Island visitors spent 2.5 nights away from home anywhere on their trip.
- All Catalina Island visitors spent 1 night average in Catalina Island.
- Overnight Catalina Island visitors stayed 1.9 average nights on the Island.

Table 18 – Average Nights Stayed in Locations on Trip

Mean nights per respondent	Spring 2016	Residence		Overnight or Day		Age		
		So Cal	Other US	Hotel	Day	<39	40-59	60+
Base: all CI visitors	202	78	38	81	102	73	81	46
Total trip	2.48	1.85	6.71	2.70	2.40	2.21	2.49	3.17
Nights on Catalina Island	0.96	1.36	0.71	1.85	0.00	0.89	1.06	1.02
Nights in Los Angeles area (other than CI)	0.85	0.12	3.05	0.57	1.21	0.60	0.83	1.09
Nights in all other locations/destinations	0.87	0.42	2.87	0.54	1.25	0.63	0.94	1.07
Base: CI overnight visitors	38	50	13	12	25	12	13	10
Total trip	3.50	2.36	6.89	2.70	5.70	3.50	3.37	4.17
Nights on Catalina Island	1.93	2.12	2.08	1.85	*	2.10	1.95	1.96
Nights in Los Angeles area (other than CI)	4.38	*	5.04	3.83	4.92	3.38	5.15	4.17
Nights in all other locations/destinations	4.63	*	5.19	*	4.57	3.83	5.07	4.90

HALF ARE DAY VISITORS; 80% OF OVERNIGHT VISITORS STAYED IN HOTELS

- The lodging breakdown for *all* Catalina Island Spring visitors shows that half 51% were Day visitors, while 40% stayed in Catalina Island hotels/inns and 9% stayed in various Other lodging.
- Of overnight visitors. 81% stayed in hotels, with 8% using shared/rental lodging, with 6% camping, 4% used unpaid Private residences, and 2% used other types as shown below.

Table 19 – Lodging Type on Catalina Island

	Spring 2016	Residence		Age		
		So Cal	Other US	<39	40-59	60+
Base: all visitors	202	78	38	73	81	46
Day Visitor	50.5%	35.9%	65.8%	57.5%	45.7%	47.8%
Hotel/Motel	40.1%	53.8%	31.6%	34.2%	42.0%	45.7%
Private/Other	9.4%	10.3%	2.6%	8.2%	12.3%	6.5%
Base: Overnight on SCI	100	50	13	31	44	24
Hotel or motel	81.0%	84.0%	92.3%	80.6%	77.3%	87.5%
Private paid vacation rental like airbnb, VRBO	8.0%	6.0%	7.7%	3.2%	11.4%	8.3%
Camping	6.0%	6.0%	0.0%	9.7%	6.8%	0.0%
Private unpaid residence of friends, family	3.0%	0.0%	0.0%	3.2%	2.3%	4.2%
On-board private boat	1.0%	2.0%	0.0%	0.0%	2.3%	0.0%
Other	1.0%	2.0%	0.0%	3.2%	0.0%	0.0%

OVER HALF MADE THEIR PAID LODGING RESERVATIONS ONLINE

- 85% of paid lodging guests reserved in advance, thus 15% made their reservation after arriving.
- Those making an advance reservation did so an average of 3.1 weeks before the trip.
- Those from Other US areas reserved 5.4 weeks versus 3.2 weeks by Southern Californians, and advance period also was longer by successively older age group.

Table 20 – Method of Reserving Paid Lodging

	Spring 2016	Residence		Overnight	Age		
		So Cal	Other US	Hotel	<39	40-59	60+
Base: Overnight in SCI hotel	95	48	13	81	29	42	23
0 (Did not plan ahead/reserved here)	14.7%	8.3%	15.4%	12.3%	17.2%	11.9%	17.4%
1 week	12.6%	14.6%	7.7%	14.8%	17.2%	11.9%	8.7%
2 weeks	12.6%	12.5%	15.4%	12.3%	20.7%	11.9%	4.3%
3-4 weeks	31.6%	41.7%	0.0%	33.3%	31.0%	31.0%	30.4%
5-8 weeks	14.7%	6.3%	53.8%	16.0%	6.9%	16.7%	21.7%
9-12 weeks	7.4%	8.3%	7.7%	7.4%	6.9%	9.5%	4.3%
More than 12 weeks	6.3%	8.3%	0.0%	3.7%	0.0%	7.1%	13.0%
Median (weeks):	3.13	3.20	5.36	3.13	2.25	3.42	3.79

OVER HALF MADE THEIR PAID LODGING RESERVATIONS ONLINE

- Over half or 55% of those staying in Catalina Island paid lodging used a general travel website for their reservation, while 14% used the lodging website, and 13% called directly.
- Use of a general travel website is even stronger for those staying specifically in hotels at 64%, while only 11% of them used the hotel website.
- Not surprisingly website use was highest among youngest guests while phone reservations are highest among oldest guests.

Table 21 – Method of Reserving Paid Lodging

	Spring 2016	Residence		Hotel	Age		
		So Cal	Other US		<39	40-59	60+
Base: Overnight in SCI hotel	95	48	13	81	29	42	23
On a travel website like hotels.com, Travelocity etc.	55.8%	58.3%	46.2%	64.2%	55.2%	54.8%	56.5%
On the lodging's website	13.7%	16.7%	23.1%	11.1%	13.8%	16.7%	8.7%
By call to the lodging or lodging's "800" reservation number	12.6%	8.3%	15.4%	14.8%	10.3%	9.5%	21.7%
Through a travel agent	3.2%	2.1%	7.7%	3.7%	0.0%	4.8%	4.3%
My company booked it	1.1%	0.0%	0.0%	1.2%	3.4%	0.0%	0.0%
Through my/our tour arranger or operator	1.1%	2.1%	0.0%	1.2%	0.0%	0.0%	4.3%
Through vacation/shared housing agency like airbnb	1.1%	2.1%	0.0%	0.0%	0.0%	2.4%	0.0%
Through other vacation rental agency	1.1%	0.0%	0.0%	0.0%	0.0%	0.0%	4.3%
Other	10.5%	10.4%	7.7%	3.7%	17.2%	11.9%	0.0%

ONE IN TEN ON A TOUR

- This Spring 8% were on a package or guided tour; this varies slightly by age.

Table 22 – On a Tour

On A Guided Tour	Spring 2016	Residence		Overnight or Day		Age		
		So Cal	Other US	Hotel	Day	<39	40-59	60+
Base:	202	78	38	81	102	73	81	46
No	92.1%	89.7%	89.5%	91.4%	92.2%	90.4%	95.1%	91.3%
Yes	7.9%	10.3%	10.5%	8.6%	7.8%	9.6%	4.9%	8.7%

DAY VISITORS AVERAGED NEARLY 7 HOURS ON THE ISLAND

Table 23 – Hours on Catalina Island (Day Visitors)

	Spring 2016	Residence		Age		
		So Cal	Other US	<39	40-59	60+
Valid Base: Day visitor to SCI	102	28	25	42	37	22
2 hours or less	2.0%	0.0%	4.0%	2.4%	2.7%	0.0%
3-4 hours	7.8%	10.7%	8.0%	4.8%	10.8%	9.1%
5-6 hours	42.2%	50.0%	52.0%	40.5%	43.2%	45.5%
7-8 hours	34.3%	25.0%	28.0%	35.7%	27.0%	40.9%
9-12 hours	11.8%	14.3%	8.0%	14.3%	13.5%	4.5%
13+ hours	2.0%	0.0%	0.0%	2.4%	2.7%	0.0%
WMean:	6.82	6.57	6.20	7.07	6.59	6.68

Spending

VERY HIGH SPENDING INCIDENCE & STRONG DAILY GROUP SPEND OF \$279

Spending Incidence

- Overall, 99% of Spring visitor groups spent money on Catalina Island.
- 93% of groups spent on meals/snacks, and 75% on beverages, the top two categories, while 62% spent on retail/shopping.
- This Spring 46% spent on lodging.

Group Daily Spending

- All Spring visitor groups spent an average total of \$279 per-day on Catalina Island.
- The highest category was lodging at \$75 average per-day, followed by snacks/meals at \$66, and shopping/gifts at \$47.* Reported nightly lodging rate was \$161 per group.
- Hotel groups spent the most overall on Catalina Island, averaging \$398 per day while Day visitor groups spent the least \$170 daily.
- On an average daily *per-capita* basis each Spring visitor spent \$122.

*Spending is allocated across all visitors groups whether or not they spent on that category.

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

Table 24 – Spending Incidence

Percent spending	Spring 2016	Residence		Overnight or Day		Age		
		So Cal	Other US	Hotel	Day	<39	40-59	60+
Base:	202	78	38	81	102	73	81	46
Total	98.5%	98.7%	100.0%	100.0%	97.1%	97.3%	100.0%	97.8%
Meals out/snacks	93.1%	92.3%	89.5%	98.8%	89.2%	91.8%	92.6%	95.7%
Drinks/beverages	75.2%	82.1%	71.1%	85.2%	68.6%	76.7%	76.5%	71.7%
Shopping/gifts/souvenirs/specialty items	61.9%	60.3%	71.1%	69.1%	61.8%	60.3%	64.2%	63.0%
Lodging	45.5%	60.3%	31.6%	98.8%	0.0%	38.4%	49.4%	50.0%
Fees for activities, tours, passes equipment, etc.	34.7%	33.3%	36.8%	37.0%	36.3%	41.1%	32.1%	28.3%
Transportation (ferry fares, cart rental, etc.)	25.7%	24.4%	23.7%	23.5%	27.5%	27.4%	24.7%	23.9%
Museum/theater admission/ nightclub covers	15.8%	11.5%	23.7%	24.7%	10.8%	15.1%	13.6%	21.7%
Groceries/personal items/other	10.9%	9.0%	5.3%	13.6%	6.9%	9.6%	14.8%	6.5%
Amenities: spa/grooming/health club	2.5%	2.6%	0.0%	4.9%	1.0%	2.7%	2.5%	2.2%
Fine arts/home decor	2.0%	1.3%	7.9%	2.5%	2.0%	1.4%	0.0%	6.5%

AVERAGE DAILY GROUP SPENDING

Table 25 – Average Daily Group Spending by Category

Mean spending per respondent	Spring 2016	Residence		Overnight or Day		Age		
		So Cal	Other US	Hotel	Day	<39	40-59	60+
Base:	202	78	38	81	102	73	81	46
Total	278.82	315.02	226.62	398.48	170.49	234.92	304.17	304.05
Lodging	74.59	93.30	47.78	152.91	0.00	56.75	75.91	98.89
Meals out/snacks	66.37	68.65	56.58	80.62	57.35	51.90	77.04	73.30
Shopping/Gifts/Souvenirs/specialty items	46.50	47.03	53.95	51.23	44.11	27.00	53.46	59.89
Fees for activities, tours, passes equipment, etc.	33.17	39.06	28.55	42.81	27.42	43.73	31.02	30.54
Drinks/beverages	22.77	23.37	14.05	29.10	17.13	19.22	27.43	16.20
Transportation (ferry fares, cart rental, etc.)	15.68	17.56	15.03	13.42	16.92	16.89	15.80	12.50
Amenities like spa, grooming or health club	3.12	4.49	0.00	5.57	1.76	4.52	1.25	4.35
Museum/theater admission/ nightclub covers	2.98	1.69	6.55	5.83	0.96	2.03	3.41	3.74
Groceries/personal items/other	2.64	1.81	2.24	3.48	1.33	2.58	3.79	0.80
Fine arts/home decor	1.24	0.64	5.29	1.85	0.99	0.01	0.00	5.43

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

\$122 AVERAGE DAILY PER-CAPITA SPENT

Table 26 - Per-Capita Daily Spending

Mean spending per individual visitor	Spring 2016	Residence		Overnight or Day		Age		
		So Cal	Other US	Hotel	Day	<39	40-59	60+
Base:	202	78	38	81	102	73	81	46
Total	122.15	140.46	94.00	199.16	70.78	101.36	130.43	139.82
Lodging	32.50	40.69	20.20	77.32	0.00	24.81	32.55	45.13
Meals out/snacks	29.60	31.23	24.41	40.06	22.78	23.00	32.66	34.51
Shopping/Gifts/Souvenirs/specialty items	19.00	21.10	21.47	26.91	16.11	12.37	21.39	27.55
Fees for activities, tours, passes equipment, etc.	15.14	17.61	13.89	21.38	12.84	18.16	13.36	14.15
Drinks/beverages	9.25	10.72	5.94	14.61	6.90	8.04	11.38	7.45
Transportation (ferry fares, cart rental, etc.)	6.77	7.87	6.14	6.63	6.83	7.23	6.83	5.73
Amenities like spa, grooming or health club	1.36	2.01	0.00	2.78	0.71	1.97	0.53	2.00
Museum/theater admission/ nightclub covers	1.32	0.76	2.68	2.94	0.41	0.97	1.43	1.72
Groceries/personal items/other	1.14	0.81	0.91	1.74	0.53	1.12	1.62	0.37
Fine arts/home decor	0.54	0.29	2.16	0.93	0.40	0.01	0.00	2.50

Note: spending allocated to all visitors (per-capita) whether or not they spent in that category.
Lodging is not rate but average spending allocated across all groups

Trip Characteristics & Visitor Demographics

MAINLY COUPLES & SOME FAMILIES; FEW SOLO

- Over half of travel groups, 53% were couples, with 20% family groups, 12% friend groups and 7% traveling alone.
- Even more hotel guests, 72% were in couples, as were 65% of those over age 60.
- 27% of Day visitors were in family groups.

Table 27 – Travel Group Composition

	Spring 2016	Residence		Overnight or Day		Age		
		So Cal	Other US	Hotel	Day	<39	40-59	60+
Base:	202	78	38	81	102	73	81	46
A couple	52.5%	60.3%	47.4%	71.6%	38.2%	46.6%	51.9%	65.2%
A family group - parents and children	20.3%	21.8%	21.1%	14.8%	26.5%	20.5%	25.9%	10.9%
A group of friends or co-workers	12.4%	9.0%	10.5%	3.7%	18.6%	13.7%	8.6%	17.4%
Alone	6.9%	2.6%	7.9%	2.5%	9.8%	9.6%	7.4%	2.2%
A mixed group of family and friends	3.0%	0.0%	10.5%	0.0%	4.9%	5.5%	1.2%	0.0%
Extended family - multi generation	2.0%	1.3%	2.6%	1.2%	1.0%	1.4%	2.5%	0.0%
Other	3.0%	5.1%	0.0%	6.2%	1.0%	2.7%	2.5%	4.3%

FEW TRAVELING WITH CHILDREN

- Groups averaged 2.61 persons this Spring,
- Overall 11% of groups traveled with someone under age 18.
 - 16% of those aged 40-59 had children with them as did 16% of those from Other US areas, versus only 6% of Hotel guests.

Table 28 – Group Size & Visitors (groups) Traveling with Children

	Spring 2016	Residence		Overnight or Day		Age		
		So Cal	Other US	Hotel	Day	<39	40-59	60+
Base:	202	78	38	81	102	73	81	46
Adult travel group	89.1%	88.5%	84.2%	93.8%	86.3%	89.0%	84.0%	100.0%
Traveling with children under 18	10.9%	11.5%	15.8%	6.2%	13.7%	11.0%	16.0%	0.0%
Mean total number	2.61	2.58	2.71	2.22	2.86	3.04	2.74	2.15

61% MARRIED/PARTNERED; 27% SINGLE; 28% HAVE CHILDREN AT HOME

Table 29 – Household Composition

	Spring 2016	Residence		Overnight or Day		Age		
		So Cal	Other US	Hotel	Day	<39	40-59	60+
Base:	202	78	38	81	102	73	81	46
Married/partnered without children under age 18 at home	45.0%	52.6%	44.7%	53.1%	38.2%	30.1%	39.5%	80.4%
Single adult without children under age 18 at home	21.3%	15.4%	21.1%	18.5%	23.5%	30.1%	17.3%	15.2%
Married/partnered with children under age 18 at home	16.3%	17.9%	15.8%	13.6%	18.6%	20.5%	22.2%	0.0%
Household with adult children over age 18 at home	6.4%	6.4%	2.6%	7.4%	5.9%	5.5%	9.9%	2.2%
Single adult with children under age 18 at home	3.0%	1.3%	7.9%	2.5%	3.9%	2.7%	4.9%	0.0%
Group of unrelated adults	2.5%	2.6%	2.6%	2.5%	1.0%	4.1%	2.5%	0.0%
Own or extended family with children under age 18 at home	1.5%	2.6%	0.0%	1.2%	2.0%	1.4%	1.2%	0.0%
Other	4.0%	1.3%	5.3%	1.2%	6.9%	5.5%	2.5%	2.2%

3% OVERALL IDENTIFIED AS LGBT

Table 30 – Sexual Orientation

	Spring 2016	Residence		Overnight or Day		Age		
		So Cal	Other US	Hotel	Day	<39	40-59	60+
Base:	202	78	38	81	102	73	81	46
Heterosexual	92.6%	92.3%	92.1%	96.3%	90.2%	94.5%	90.1%	95.7%
Gay male	2.0%	1.3%	2.6%	1.2%	2.0%	2.7%	2.5%	0.0%
Lesbian	0.5%	0.0%	0.0%	0.0%	1.0%	1.4%	0.0%	0.0%
Other	2.0%	5.1%	0.0%	0.0%	2.9%	1.4%	3.7%	0.0%
Refused	3.0%	1.3%	5.3%	2.5%	3.9%	0.0%	3.7%	4.3%

6 IN 10 CATALINA ISLAND U.S. VISITORS IDENTIFY AS CAUCASIAN

- Another 22% of Spring visitors are Hispanic/Latino, followed by 10% African-American and 8% Asian American.

Table 31 – Ethnicity Demographics

	Spring 2016	Residence		Overnight or Day		Age		
		So Cal	Other US	Hotel	Day	<39	40-59	60+
Base: US resident	197	78	38	80	99	69	81	45
Caucasian (non-Hispanic)	61.4%	71.8%	76.3%	67.5%	54.5%	59.4%	51.9%	80.0%
Hispanic/Latino	21.8%	21.8%	7.9%	18.8%	24.2%	27.5%	22.2%	11.1%
African-American	10.2%	3.8%	7.9%	10.0%	12.1%	8.7%	16.0%	2.2%
Asian-American	8.1%	6.4%	2.6%	5.0%	10.1%	11.6%	8.6%	2.2%
Native American	1.0%	2.6%	0.0%	1.3%	0.0%	0.0%	2.5%	0.0%
Pacific Islander	0.5%	1.3%	0.0%	1.3%	0.0%	1.4%	0.0%	0.0%
Other group	3.0%	1.3%	5.3%	1.3%	5.1%	4.3%	1.2%	4.4%
Prefer not to disclose	0.5%	1.3%	0.0%	1.3%	0.0%	1.4%	0.0%	0.0%

ADULT SPRING VISITORS AVERAGE MID-40S IN AGE; 45% OVER AGE 50

Table 32 – Respondent Age

Excluding refusals	Spring 2016	Residence		Overnight or Day		Age		
		So Cal	Other US	Hotel	Day	<39	40-59	60+
Base: Valid	200	78	37	80	101	73	81	46
18-29	20.0%	19.2%	10.8%	18.8%	21.8%	54.8%	0.0%	0.0%
30-39	16.5%	17.9%	16.2%	12.5%	19.8%	45.2%	0.0%	0.0%
40-49	19.0%	16.7%	18.9%	15.0%	19.8%	0.0%	46.9%	0.0%
50-59	21.5%	23.1%	32.4%	27.5%	16.8%	0.0%	53.1%	0.0%
60-69	17.0%	15.4%	21.6%	17.5%	17.8%	0.0%	0.0%	73.9%
70+	6.0%	7.7%	0.0%	8.8%	4.0%	0.0%	0.0%	26.1%
Median:	46.61	47.19	50.75	50.86	43.75	28.45	50.08	66.26

SPRING VISITORS REPORT \$80,300 ANNUAL MEDIAN HOUSEHOLD INCOME

- About one-third, 32% report median annual income of \$100,000+
- There are notable differences between segments.
 - Highest household income ranged from \$90,800 for those aged 40-59 and \$87,500 for Other US visitors.
 - The lowest income group surprisingly was Hotel guests at \$73,100, usually the highest group, and \$81,300 for Southern Californians, both of which include many of the same visitors.

Table 33 – Average Annual Household Income

	Spring 2016	Residence		Overnight or Day		Age		
		So Cal	Other US	Hotel	Day	<39	40-59	60+
Base: Valid respondent	166	66	31	64	85	65	67	33
Under \$30,000	17.5%	18.2%	3.2%	17.2%	18.8%	29.2%	9.0%	12.1%
\$30,000 - \$49,999	12.0%	10.6%	19.4%	14.1%	11.8%	15.4%	13.4%	3.0%
\$50,000 - \$74,999	15.7%	13.6%	19.4%	20.3%	11.8%	15.4%	13.4%	21.2%
\$75,000 - \$99,999	22.9%	30.3%	16.1%	25.0%	22.4%	20.0%	22.4%	30.3%
\$100,000 - \$199,999	18.1%	19.7%	22.6%	14.1%	18.8%	15.4%	20.9%	15.2%
\$200,000 - \$500,000	10.8%	7.6%	12.9%	7.8%	11.8%	3.1%	16.4%	15.2%
Over \$500,000	3.0%	0.0%	6.5%	1.6%	4.7%	1.5%	4.5%	3.0%
Mean:	124,910	98,068	161,855	102,930	139,147	83,038	157,090	141,288
Median:	80,263	81,250	87,500	73,077	83,553	58,750	90,833	86,250

RESPONDENT GENDER SKEWED FEMALE AT 60%

Table 34 – Gender

	Spring 2016	Residence		Overnight or Day		Age		
		So Cal	Other US	Hotel	Day	<39	40-59	60+
Base:	202	78	38	81	102	73	81	46
Female	59.9%	57.7%	52.6%	53.1%	65.7%	58.9%	59.3%	60.9%
Male	40.1%	42.3%	47.4%	46.9%	34.3%	41.1%	40.7%	39.1%

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

CATALINA EXPERIENCE MAINLY SEEN AS RELAXING, FUN, BEAUTIFUL

Table 35 – Words Describing Catalina Island Experience

	Spring 2016	Residence		Overnight or Day		Age		
		So Cal	Other US	Hotel	Day	<39	40-59	60+
Base:	202	78	38	81	102	73	81	46
Relaxing	21.3%	20.5%	26.3%	24.7%	17.6%	13.7%	24.7%	26.1%
Fun	12.4%	12.8%	13.2%	14.8%	10.8%	13.7%	8.6%	17.4%
Beautiful	10.4%	5.1%	13.2%	9.9%	7.8%	8.2%	11.1%	10.9%
Awesome	5.0%	2.6%	2.6%	3.7%	5.9%	5.5%	7.4%	0.0%
Good/ Great	4.5%	5.1%	0.0%	2.5%	5.9%	5.5%	6.2%	0.0%
Amazing	4.0%	6.4%	0.0%	2.5%	3.9%	9.6%	1.2%	0.0%
Nice	4.0%	6.4%	0.0%	6.2%	2.9%	4.1%	3.7%	4.3%
Peaceful	3.5%	5.1%	2.6%	4.9%	2.9%	4.1%	4.9%	0.0%
Wonderful	3.5%	6.4%	0.0%	3.7%	3.9%	2.7%	3.7%	4.3%
Pretty	2.0%	2.6%	0.0%	0.0%	2.9%	2.7%	2.5%	0.0%
Charming	1.5%	1.3%	5.3%	2.5%	1.0%	1.4%	0.0%	4.3%
Enjoyable	1.5%	0.0%	2.6%	0.0%	2.9%	1.4%	0.0%	4.3%
Fantastic	1.5%	0.0%	0.0%	3.7%	0.0%	0.0%	1.2%	4.3%
Lovely	1.5%	0.0%	2.6%	2.5%	1.0%	1.4%	0.0%	4.3%
Pleasant	1.5%	0.0%	7.9%	0.0%	2.9%	0.0%	2.5%	2.2%
Cold	1.0%	1.3%	2.6%	1.2%	1.0%	1.4%	1.2%	0.0%
Comfortable	1.0%	1.3%	2.6%	1.2%	1.0%	0.0%	2.5%	0.0%
Excellent	1.0%	0.0%	2.6%	0.0%	2.0%	0.0%	1.2%	2.2%
Expensive	1.0%	1.3%	0.0%	1.2%	1.0%	1.4%	0.0%	2.2%
Serene	1.0%	1.3%	0.0%	1.2%	1.0%	0.0%	2.5%	0.0%
Unique	1.0%	0.0%	2.6%	1.2%	1.0%	0.0%	1.2%	2.2%

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:
 - 600 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 for any temporary purpose(s) other than for regular work or to attend school.

VARIED INTERVIEW LOCATIONS TO CAPTURE A REPRESENTATIVE SAMPLE

- The 202 on-site intercepts were conducted at highly frequented visitor locations, mainly Cabrillo Mole, Avalon Crescent and Avalon Harbor, as well as the others, as shown below:

Table 36 — Spring Interview Locations

	Spring 2016
Base:	202
Cabrillo Mole (Catalina Express/Flyer landing)	26.7%
Avalon - Crescent	22.8%
Avalon Harbor/ Beaches	21.3%
Avalon Pier/Dinghy Dock	12.9%
Tour Plaza	6.4%
Descanso Beach	5.4%
Airport	2.5%
Island Express Helipad	1.5%
Other location	0.5%

READING THE REPORT TABLES & CHARTS

- Each table in the report is headed with these columns:

Sample Table/Headings

	Spring 2016	Residence		Overnight or Day		Age		
		So Cal	Other US	Hotel	Day	<39	40-59	60+
Base:	202	78	38	81	102	73	81	46

- Season:* Total for the season shown
 - Residence:* visitors residence/origin – either California or Other US states (excluding California)
 - Day or Overnight:* where and whether visitors lodged overnight – either in a Catalina Island hotel or motel, or on Catalina Island for the day only
- The bold numbers immediately below the column header are the “base” (i.e., number of respondents) for each group.
- Statistical differences between these groups are indicated by plus (+) or minus (-) sign next to a number, higher or lower compared to the Wave Total.
- The Total sample for this season has an error factor of +/- 6.9% at the 95% confidence level.