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Profile of Catalina Island Visitors Wave 2 – Summer 2016



September 2016

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 leisure and business visitors to build the destination brand and support local economic development goals.
- 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 **visitor profiles**
 - annual of **visitor volume** and **visitor spending** measures
 - annual **fiscal (tax) impacts**
 - visitor-supported local **employment**
- This report presents the **Summer 2016** (i.e. July – September) visitor profile, the second 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

EXECUTIVE SUMMARY — I

Overall 2016 Summer Visitor - Summary

Summer visitors were mostly Southern Californian, nearly equally likely to live in LA County and in other parts of So Cal. Despite their proximity, two-thirds either have never visited before or have not in at least 3 years. Most came for leisure/vacation, as likely for the day or overnight, and if so, stayed in a hotel for two nights average. They spent close to \$300 per day on the island. They traveled about equally in families or couples, in their early 40's, split between Caucasian and other cultural groups, with \$75,000 median income.

Residence

- Most, three-quarters of Catalina Summer visitor groups are Southern California residents, with L A County the largest single feeder region at 40%, and other Southern California a close second at 35%.
- The rest of California accounted for another 12%, with other U.S. states at 13%, and only 2% International.

New vs. Repeat, Main Destination

- Only a third of visitor groups had visited previously (past 3 years), which may be somewhat surprising given the island's proximity to its main feeder markets.
- The vast majority name it as their main, if not the only destination on this trip.

EXECUTIVE SUMMARY – 2

Transportation Modes

- Over 9 out of 10 Summer groups took a Catalina Island ferry to reach the island.
- Those coming from beyond Southern California either drove their own vehicle or flew into the region (prior to arriving on Catalina Island).

Purposes, Activities, Areas Visited

- Two-thirds of visitor groups visited Catalina Island for a leisure vacation or getaway.
- Attending a wedding, birthday, or other celebration was a secondary motivation, with 1/5 of visitors visiting for this reason.
- Nearly 80% ate in local restaurants, with 40-50% visiting the beach, shopping, and exploring and just under 40% doing water activities.
- Avalon is by far the most-visited part of the island, with the retail district and harbor area topping the list.

Future Visitation Intent

- When asked, Summer visitors report a strong intent to revisit the island in the next 12 months, with 77% saying they are either somewhat likely or highly likely to do so.
- Given the actual current level of repeat visitation, it may be that visitors are more well intentioned versus their actual future re-visit behavior.

EXECUTIVE SUMMARY – 3

Overnight Stays

- 55% visited Catalina Island for the day only while 45% stayed overnight.
- Most overnighnters stayed in a Catalina Island hotel, motel, or B&B inn, stayed an average of 2 nights and made their reservations about 2 weeks in advance.
- Those coming from longer distances tended to stay longer, with L A County residents having the shortest length of stay.
- Day Visitor groups spent an average of 7 hours on the island.

Spending

- Nearly everyone spent money during their time on Catalina Island.
- The average daily spending was nearly \$300 per group, with Hotel Guests outspending Day Visitors 2:1, \$450 versus \$222, respectively.
- About half of daily spending is for lodging and meals out, with tours/activities and shopping/gifts each contributing about another \$40 each.
- On a per-capita basis, each visitor spent an average of \$122 per day.

EXECUTIVE SUMMARY – 4

Visitor Demographics

- About a third each of the total Summer visitors traveled as families or couples.
- Average group size was 2.9.
- A quarter of travel groups included children under age 18; a comparable number reported having children at home.
- The ethnic mix was relatively diverse, split about 50/50 between Caucasians and other ethnicities, principally Hispanic as well as Asian-Americans.
- Adult visitors averaged 41 years of age.
- Reported median annual household income was \$74,500, and as typical, visitors over age 40 reported higher income than those under age 40.

Detailed Findings

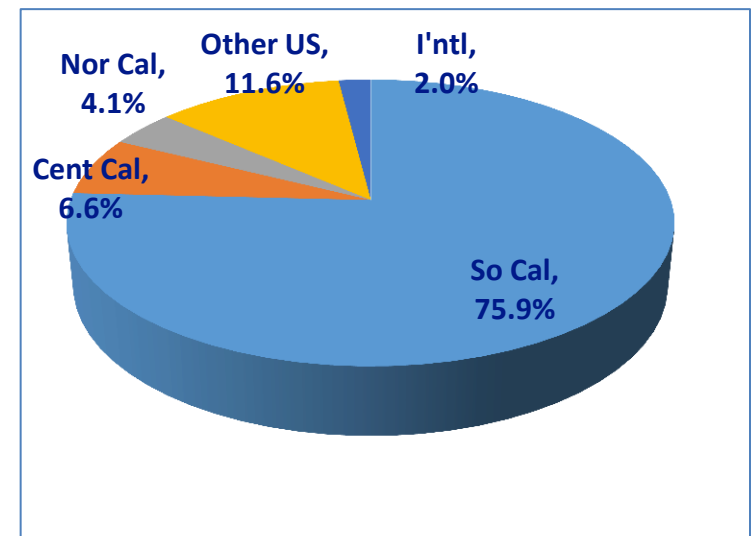
5 OUT OF 6 SUMMER VISITOR GROUPS FROM CALIFORNIA

- The vast majority, 85% of Catalina Island (CI) Summer visitor groups were from California, of which 75% were from Southern California.
 - Another 13% were from Other States, with only 2% International.
- These proportions were comparable for hotel guests and day visitors, and across age groups.

Table I – Visitor Share by Overall Residence

Origin	Summer 2016	Overnight or Day		Age		
		Hotel	Day Only	<39	40-59	60+
Base:	202	71	112	93	82	26
California	84.7%	88.7%	83.9%	84.9%	84.1%	84.6%
Other US	13.4%	9.9%	13.4%	11.8%	14.6%	15.4%
International	2.0%	1.4%	2.7%	3.2%	1.2%	0.0%

Exhibit I – Summer 2016 Share Detail by Origin



CALIFORNIA TOP U.S. FEEDER; NEARLY HALF FROM LA COUNTY

- California accounted for 86% of U.S. resident visitors, with Nevada a distant second at 3% and Arizona, New York, and Texas close behind at 2% each.
- The top 10 states accounted for 98% of U.S. resident visitors.
- Among Californians, Central Los Angeles was the highest feeder at 34%
 - Including the L A Valleys at 13%, L A County accounted for 47% of Californians.
- Orange County was second at 19%, followed by San Bernardino/Riverside at 14%.
- Only 12% were from outside Southern California

Table 2 – Top Feeder States

	Summer 2016	Overnight or Day	
		Hotel	Day Only
Base: US resident	198	70	109
California	86.4%	90.0%	86.2%
Arizona	2.0%	0.0%	2.8%
New York	2.0%	1.4%	1.8%
Nevada	3.0%	4.3%	0.9%
Texas	2.0%	2.9%	1.8%
Illinois	0.5%	1.4%	0.0%
Minnesota	0.5%	0.0%	0.9%
Oregon	0.5%	0.0%	0.9%
Connecticut	0.5%	0.0%	0.0%
New Mexico	1.0%	0.0%	1.8%
Top 10 States	98.4%	100%	97.1%

Table 3 – California Feeder Areas

	Summer 2016	Overnight or Day	
		Hotel	Day Only
Base: CA resident	171	63	94
Central LA	34.5%	30.2%	38.3%
Orange County	18.7%	14.3%	22.3%
San Bernardino-Riverside	13.5%	14.3%	13.8%
LA Valley Areas	12.9%	17.5%	11.7%
San Diego	8.2%	9.5%	5.3%
Central Coast	2.3%	1.6%	1.1%
Bakersfield/ Mojave	1.8%	1.6%	2.1%
Sacramento Area	2.9%	3.2%	2.1%
Oakland/ East Bay	1.2%	3.2%	0.0%
Montry/Sta Cruz/Sn Jose/ Palo Alto	2.9%	3.2%	3.2%
San Joaquin Valley/ Stockton	0.6%	1.6%	0.0%
San Francisco	0.6%	0.0%	0.0%
Northern California	0.0%	0.0%	0.0%

HIGH FIRST-TIME VISITATION, EVEN FROM LOCAL AREAS; REPEAT SKEWED OLDER

- Given the high share of LA County resident visitors it may be surprising that 67% overall were visiting Catalina Island for the first time (in past three years), whereas 33% were repeat visitors.
 - Even among those from LA County, only 35% had visited before. Visitors from other parts of Southern California were somewhat more likely to be repeaters, at 47%.
 - However by age, 50% of visitors 60+ had visited before and they made 8.3 trips (in three years).
- All Summer visitors averaged 1.1 visits to Catalina Island in the past three years.
- Repeat visitors averaged 3.3 trips to Catalina Island in three years – about once a year.

Table 4 – Visited Catalina Island in Past 3 Years

	Summer 2016	Residence			Overnight or Day		Age		
		LA Co.	So Cal	Other US	Hotel	Day Only	<39	40-59	60+
Base:	202	84	73	27	71	112	93	82	26
First visit	66.8%	65.5%	53.4%	92.6%	69.0%	70.5%	68.8%	69.5%	50.0%
Visited before	33.2%	34.5%	46.6%	7.4%	31.0%	29.5%	31.2%	30.5%	50.0%
Number of Visits in past 3 years									
None	66.8%	65.5%	53.4%	92.6%	69.0%	70.5%	68.8%	69.5%	50.0%
1 time	11.9%	11.9%	17.8%	0.0%	11.3%	11.6%	15.1%	8.5%	11.5%
2-3 times	13.4%	14.3%	16.4%	7.4%	12.7%	12.5%	10.8%	13.4%	23.1%
4-6 times	2.5%	4.8%	1.4%	0.0%	1.4%	1.8%	3.2%	2.4%	0.0%
7-10 times	2.0%	2.4%	2.7%	0.0%	1.4%	1.8%	2.2%	2.4%	0.0%
11+ times	3.5%	1.2%	8.2%	0.0%	4.2%	1.8%	0.0%	3.7%	15.4%
Mean (Incl. None):	1.08	0.89	2.67	0.15	1.07	0.74	0.63	1.27	4.15
Mean (Excl. None):	3.27	2.59	5.74	2.00	3.45	2.52	2.03	4.16	8.31

INTERNET IS PRIMARY CI INFORMATION PLANNING SOURCE

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

- 98% used at least one Catalina Island information source when planning this trip.
- 63% used an internet source, of which:
 - 43% used a general travel website
 - 17% used the ferry's website(s)
 - 8% used a website or app from the CI Visitor Bureau
- 21% relied on referrals from family or friends, while 12% had visited before and relied on their own information to plan their trip.
- Far more, 76% of Hotel guests used internet sources versus 63% of Day visitors.

INTERNET IS PRIMARY CI INFORMATION PLANNING SOURCE

Table 5 – Planning Sources for Catalina Island Information

	Summer 2016	Residence			Overnight or Day		Age		
		LA Co.	So Cal	Other US	Hotel	Day Only	<39	40-59	60+
Base:	202	84	73	27	71	112	93	82	26
ANY INTERNET SOURCE	63.4%	73.8%	53.4%	66.7%	76.1%	62.5%	71.0%	63.4%	34.6%
General travel website/search like Travelocity, etc.	42.6%	41.7%	38.4%	63.0%	59.2%	37.5%	40.9%	48.8%	30.8%
Family member/friend	20.8%	20.2%	13.7%	25.9%	19.7%	18.8%	18.3%	19.5%	34.6%
Own experience/been here before	12.4%	8.3%	20.5%	11.1%	9.9%	11.6%	7.5%	15.9%	19.2%
Catalina Express/Flyer website	17.3%	29.8%	11.0%	3.7%	12.7%	21.4%	24.7%	11.0%	7.7%
Catalina Isl. Visitor Bureau web, mobile or app	7.9%	13.1%	2.7%	3.7%	8.5%	8.0%	10.8%	7.3%	0.0%
Interactive website like Yelp or Trip Advisor	3.5%	2.4%	6.8%	0.0%	7.0%	0.9%	5.4%	2.4%	0.0%
Auto Club or retail guide books	1.5%	1.2%	2.7%	0.0%	0.0%	2.7%	0.0%	3.7%	0.0%
Catalina Express Magazine	2.5%	0.0%	6.8%	0.0%	1.4%	3.6%	1.1%	3.7%	3.8%
Hotel	2.0%	2.4%	1.4%	3.7%	4.2%	0.0%	4.3%	0.0%	0.0%
Visit California Visitor Guide	1.0%	1.2%	1.4%	0.0%	1.4%	0.9%	1.1%	1.2%	0.0%
Catalina Island Visitor Bureau Visitor Guide	1.0%	0.0%	1.4%	3.7%	1.4%	0.9%	1.1%	1.2%	0.0%
Visit California web site	1.0%	0.0%	2.7%	0.0%	0.0%	1.8%	2.2%	0.0%	0.0%
Newspaper or magazine	0.5%	0.0%	1.4%	0.0%	1.4%	0.0%	0.0%	1.2%	0.0%
Travel service company info or promotion	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Tour Operator	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Other	8.9%	2.4%	13.7%	14.8%	4.2%	12.5%	7.5%	6.1%	23.1%
None	2.0%	2.4%	2.7%	0.0%	1.4%	1.8%	2.2%	2.4%	0.0%

ON ISLAND, CATALINA MAP MOST-USED INFORMATION SOURCE

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

- Overall 88% of Summer visitors sought information on Catalina Island once there.
- Interestingly, the Catalina Map was the source most used at 28%, followed by visitors' personal experience at 14%. Internet sources accounted for just 18% of in-destination information.
- Older adults (60+) were especially likely to use their own experience.

ON ISLAND, CATALINA MAP MOST-USED INFORMATION SOURCE

Table 6 – Information Sources Used on Catalina Island

	Summer 2016	Residence			Overnight or Day		Age		
		LA Co.	So Cal	Other US	Hotel	Day Only	<39	40-59	60+
Base:	202	84	73	27	71	112	93	82	26
Catalina island Map	28.2%	27.4%	31.5%	37.0%	23.9%	31.3%	34.4%	20.7%	26.9%
Own experience/been here before	23.8%	22.6%	30.1%	11.1%	21.1%	22.3%	18.3%	23.2%	46.2%
ANY INTERNET SOURCE	17.8%	8.3%	26.0%	22.2%	19.7%	17.0%	22.6%	15.9%	7.7%
Hotel/ concierge/ hotel rack brochures	13.9%	15.5%	13.7%	7.4%	19.7%	11.6%	11.8%	12.2%	26.9%
General Travel search, website, or app	15.8%	8.3%	21.9%	18.5%	16.9%	16.1%	20.4%	13.4%	7.7%
Catalina Island visitor center	7.9%	13.1%	2.7%	11.1%	2.8%	10.7%	11.8%	6.1%	0.0%
Local friends/family	5.4%	4.8%	6.8%	3.7%	2.8%	6.3%	4.3%	7.3%	3.8%
Family member/friend	4.0%	1.2%	4.1%	7.4%	1.4%	3.6%	5.4%	1.2%	7.7%
Catalina Express Magazine	5.0%	4.8%	4.1%	7.4%	4.2%	4.5%	2.2%	9.8%	0.0%
Catalina Island Visitor Bureau Visitor Guide	1.5%	0.0%	1.4%	3.7%	4.2%	0.0%	2.2%	1.2%	0.0%
Interactive website or app	0.5%	0.0%	1.4%	0.0%	1.4%	0.0%	1.1%	0.0%	0.0%
Mobile site/app for specific attraction/activity here	1.0%	0.0%	1.4%	3.7%	0.0%	0.9%	1.1%	1.2%	0.0%
Tour Operator	4.0%	4.8%	1.4%	7.4%	1.4%	5.4%	5.4%	2.4%	3.8%
Catalina Island Visitor Bureau web, mobile or app	1.0%	0.0%	2.7%	0.0%	2.8%	0.0%	1.1%	1.2%	0.0%
Visit California Visitor Guide	1.5%	1.2%	0.0%	7.4%	1.4%	0.9%	3.2%	0.0%	0.0%
Local newspaper or magazine	2.0%	2.4%	1.4%	3.7%	1.4%	2.7%	1.1%	2.4%	3.8%
Visit California web site	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Retail Guide books/Auto Club	0.5%	0.0%	0.0%	3.7%	0.0%	0.9%	0.0%	1.2%	0.0%
Other	5.0%	4.8%	2.7%	11.1%	9.9%	1.8%	2.2%	7.3%	7.7%
None	12.4%	14.3%	12.3%	11.1%	9.9%	15.2%	10.8%	14.6%	11.5%

GOOGLE MOST-USED INTERNET RESOURCE, THEN FERRY WEBSITES

- Among those using any internet for planning or once on the island, over 2/3 or 68% used a Google search while 29% used a ferry express website.
- Another 16% went to the Catalina Island Visitor Bureau website/app and 10% used an interactive website.

Table 7 – Internet Sources Used

	Summer 2016	Residence			Overnight or Day		Age		
		LA Co.	So Cal	Other US	Hotel	Day Only	<39	40-59	60+
Base: Used internet	138	64	45	18	58	75	68	58	11
Google search engine	68.1%	56.3%	80.0%	77.8%	75.9%	61.3%	67.6%	70.7%	63.6%
Catalina Express/Flyer website	29.0%	40.6%	24.4%	16.7%	17.2%	37.3%	32.4%	24.1%	27.3%
Catalina Island Visitor Bureau web/mobile/ app	15.9%	17.2%	15.6%	11.1%	24.1%	9.3%	16.2%	17.2%	9.1%
Trip Advisor, Yelp/interactive travel site	10.1%	9.4%	13.3%	11.1%	8.6%	10.7%	11.8%	6.9%	18.2%
Travel website, e.g. expedia, travelocity	8.7%	9.4%	6.7%	11.1%	19.0%	1.3%	2.9%	10.3%	36.4%
Other internet or app based resource	3.6%	3.1%	4.4%	0.0%	5.2%	1.3%	5.9%	0.0%	9.1%
Other search engine	0.7%	1.6%	0.0%	0.0%	1.7%	0.0%	0.0%	0.0%	9.1%
Facebook	0.7%	0.0%	2.2%	0.0%	1.7%	0.0%	0.0%	1.7%	0.0%
Any Mobile site or app	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Voice search	0.7%	1.6%	0.0%	0.0%	0.0%	1.3%	1.5%	0.0%	0.0%
None of these	0.7%	0.0%	0.0%	5.6%	0.0%	1.3%	0.0%	1.7%	0.0%

CI MAIN DESTINATION FOR NEARLY 9 OF 10 GROUPS, NEARLY ALL SO CAL RESIDENTS

- Catalina Island was the main destination of 86% of visitor groups' trips.
 - It was the main destination for nearly all regional visitors – 99% for LA County and 96% for other Southern California residents.
- By contrast, Catalina was named by only 33% of visitors from Other U.S. , while another 33% of them named Southern California (generally), and for 26% Los Angeles was their primary destination, supporting that those from farther away tend to visit multiple places on their trip.
- As well, 91% of Hotel Guests versus 81% of Day Visitors named Catalina their main destination.

Table 8 – Main Trip Destination

	Summer 2016	Residence			Overnight or Day		Age		
		LA Co.	So Cal	Other US	Hotel	Day Only	<39	40-59	60+
Base:	202	84	73	27	71	112	93	82	26
Catalina Island	86.1%	98.8%	95.9%	33.3%	91.5%	81.3%	86.0%	85.4%	88.5%
Los Angeles area	5.4%	0.0%	0.0%	25.9%	1.4%	8.0%	6.5%	4.9%	3.8%
Southern California areas (non LA, Sta Barbara to San Diego)	5.9%	0.0%	1.4%	33.3%	7.0%	6.3%	6.5%	7.3%	0.0%
Mexico	2.5%	1.2%	2.7%	7.4%	0.0%	4.5%	1.1%	2.4%	7.7%
California and/or other Western States	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Other California (SFO, No. Cal, etc.)	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
All other areas	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%

ALL NAMED CI AS A DESTINATION ON THEIR TRIP

While it makes sense that 100% indicated visiting Catalina Island, the data below indicates other areas they also visited on this trip.

- Overall 11% each also visited Los Angeles and other Southern California areas.
- A sharper but not surprising contrast is seen for Other U.S. visitors, with 56% visiting Los Angeles, 48% visiting other So Cal areas and 19% visiting other parts of California.

Table 9 – All Destinations on Trip

	Summer 2016	Residence			Overnight or Day		Age		
		LA Co.	So Cal	Other US	Hotel	Day Only	<39	40-59	60+
Base:	202	84	73	27	71	112	93	82	26
Catalina Island	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Los Angeles area	11.4%	0.0%	2.7%	55.6%	5.6%	15.2%	11.8%	12.2%	7.7%
Southern California areas (non LA, Santa Barbara to San Diego)	10.9%	0.0%	4.1%	48.1%	11.3%	10.7%	9.7%	14.6%	3.8%
Mexico	3.0%	1.2%	2.7%	7.4%	0.0%	5.4%	1.1%	3.7%	7.7%
Other California (SFO, No. Cal, etc.)	3.0%	0.0%	0.0%	18.5%	4.2%	1.8%	4.3%	1.2%	3.8%
California and/or other Western States	1.5%	0.0%	0.0%	7.4%	2.8%	0.9%	2.2%	0.0%	3.8%
USA (California plus other areas)	1.0%	0.0%	0.0%	3.7%	0.0%	1.8%	1.1%	1.2%	0.0%
All other areas	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%

NON-SOCAL VISITORS DROVE OR FLEW INTO SOCAL REGION

- 46% of non-local visitor groups drove into the Southern California region, while another 40% flew by commercial air.
- Expectedly, this varies by origin with 48% of Other U.S. visitors arriving by air and 41% driving to the region.
- As well, 52% of Day visitors flew in versus only 22% of Hotel guests, suggesting the latter came from nearer to Catalina.

Table 10 – Transportation into Southern California Region

	Summer 2016	Residence	Overnight or Day		Age		
		Other US	Hotel	Day Only	<39	40-59	60+
Base: SC visitor	48	27	18	23	25	17	6
Commercial airline	39.6%	48.1%	22.2%	52.2%	44.0%	35.3%	33.3%
Personal vehicle	45.8%	40.7%	61.1%	39.1%	44.0%	41.2%	66.7%
Rental vehicle	4.2%	0.0%	5.6%	4.3%	4.0%	5.9%	0.0%
Cruise ship	2.1%	0.0%	5.6%	0.0%	4.0%	0.0%	0.0%
Public bus/Greyhound	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Tour coach	4.2%	7.4%	0.0%	0.0%	4.0%	5.9%	0.0%
RV/motorhome	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Private/charter airplane	2.1%	0.0%	5.6%	0.0%	0.0%	5.9%	0.0%
Other	2.1%	3.7%	0.0%	4.3%	0.0%	5.9%	0.0%

9 OF 10 VISITORS TOOK A FERRY TO REACH CATALINA ISLAND

- To reach Catalina Island, the vast majority, 92% took a Catalina Island ferry.
- Other modes were 3% arriving via private/seaplane, and another 3% on a cruise ship tender.

Table 11 – Transportation to Arrive on Catalina Island

	Summer 2016	Residence			Overnight or Day		Age		
		LA Co.	So Cal	Other US	Hotel	Day Only	<39	40-59	60+
Base:	202	84	73	27	71	112	93	82	26
Catalina Express or Catalina Flyer ferry	91.6%	95.2%	89.0%	81.5%	97.2%	91.1%	96.8%	89.0%	80.8%
Cruise ship (tender)	2.5%	1.2%	2.7%	7.4%	0.0%	4.5%	1.1%	2.4%	7.7%
Private plane/seaplane	3.0%	2.4%	5.5%	0.0%	2.8%	2.7%	0.0%	7.3%	0.0%
Private/charter yacht or boat	1.5%	0.0%	2.7%	3.7%	0.0%	0.0%	0.0%	1.2%	7.7%
Helicopter	1.5%	1.2%	0.0%	7.4%	0.0%	1.8%	2.2%	0.0%	3.8%

LEISURE/VACATION MAIN REASON FOR VISITING CATALINA ISLAND

- Two-thirds, or 67%, of Summer visitor groups primarily visited Catalina Island for leisure/vacation, while another one-fifth, or 22%, came for a specific celebration.
- Somewhat more, 30% of L A County residents came for a celebration, yet still 66% of them were visiting for pleasure.

Table 12 – Main Reason for Visiting Catalina Island

	Summer 2016	Residence			Overnight or Day		Age		
		LA Co.	So Cal	Other US	Hotel	Day Only	<39	40-59	60+
Base:	202	84	73	27	71	112	93	82	26
Vacation/pleasure/to visit	67.3%	65.5%	68.5%	63.0%	76.1%	60.7%	68.8%	67.1%	65.4%
Celebration: wedding anniversary/ birthday	21.8%	29.8%	19.2%	11.1%	22.5%	24.1%	21.5%	19.5%	26.9%
Sightseeing/explore the area	5.9%	3.6%	4.1%	14.8%	0.0%	8.9%	4.3%	8.5%	3.8%
Outdoor or water recreation	1.5%	0.0%	1.4%	7.4%	0.0%	0.9%	2.2%	1.2%	0.0%
Conduct business	1.0%	1.2%	1.4%	0.0%	1.4%	0.9%	1.1%	1.2%	0.0%
Special event	1.0%	0.0%	2.7%	0.0%	0.0%	1.8%	1.1%	1.2%	0.0%
Visit relatives/friends/personal or social visit	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Combining business or meeting and pleasure	0.5%	0.0%	1.4%	0.0%	0.0%	0.9%	0.0%	0.0%	3.8%
Other	1.0%	0.0%	1.4%	3.7%	0.0%	1.8%	1.1%	1.2%	0.0%

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 reasons.

- The reasons for visitation consistent with the main reasons: for leisure, followed in distant second for a celebration.
 - And a third, 32%, of LA County residents came for a celebration, at least in part.

Table 13 – All Reason/Purposes for Catalina Island Visit

	Summer 2016	Residence			Overnight or Day		Age		
		LA Co.	So Cal	Other US	Hotel	Day Only	<39	40-59	60+
Base:	202	84	73	27	71	112	93	82	26
Vacation/pleasure/to visit	74.3%	72.6%	76.7%	70.4%	80.3%	70.5%	73.1%	78.0%	69.2%
Celebration: wedding anniversary/ birthday	23.8%	32.1%	19.2%	18.5%	23.9%	26.8%	23.7%	22.0%	26.9%
Sightseeing/explore the area	11.4%	7.1%	12.3%	18.5%	5.6%	14.3%	11.8%	11.0%	11.5%
Outdoor or water recreation	3.0%	0.0%	5.5%	7.4%	2.8%	0.9%	4.3%	2.4%	0.0%
Special event	2.0%	0.0%	4.1%	3.7%	0.0%	2.7%	2.2%	2.4%	0.0%
Visit relatives/friends/personal or social visit	0.5%	0.0%	0.0%	3.7%	0.0%	0.9%	0.0%	1.2%	0.0%
Conduct business	1.0%	1.2%	1.4%	0.0%	1.4%	0.9%	1.1%	1.2%	0.0%
Combining business or meeting and pleasure	0.5%	0.0%	1.4%	0.0%	0.0%	0.9%	0.0%	0.0%	3.8%
Other	1.5%	1.2%	1.4%	3.7%	0.0%	2.7%	1.1%	2.4%	0.0%

MOST VISITORS ATE IN RESTAURANTS

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

- The vast majority of visitor groups, 79%, ate in local restaurants.
 - Notably, younger adults were less likely to eat in restaurants, with 70% doing so versus more than 80% of those ages 40+.
- Although less than 50% of visitors engaged in any other single activity, the next-most popular were going to the beach, at 47%, shopping at 47%, and exploring/sightseeing at 41%.
- Additionally, 38% engaged in water activities, 24% socialized with friends and family, and 24% rented/toured on golf carts.
- Additionally, far more, 63% of Other U.S. visitors do some shopping versus 45% of Southern Californians.
- As well, fewer 31% of L A County residents did water activities, while more 37% rented a golf cart. This suggests regional visitors may have a slightly different perception of what Catalina has to offer than those from farther away who may be less familiar and visit less often.

MOST VISITORS ATE IN RESTAURANTS

Table 14 – Catalina Island Activities

	Summer 2016	Residence			Overnight or Day		Age		
		LA Co.	So Cal	Other US	Hotel	Day Only	<39	40-59	60+
Base:	202	84	73	27	71	112	93	82	26
Eat in restaurants	78.7%	78.6%	82.2%	70.4%	80.3%	79.5%	69.9%	85.4%	88.5%
Shopping	46.5%	44.0%	45.2%	63.0%	46.5%	46.4%	39.8%	50.0%	61.5%
Sightsee/explore the area	40.6%	42.9%	38.4%	33.3%	43.7%	36.6%	41.9%	41.5%	34.6%
Go to the beach	47.0%	48.8%	45.2%	51.9%	57.7%	38.4%	53.8%	43.9%	34.6%
Water activities:swim, snorkel, kayak, etc.	38.1%	31.0%	41.1%	44.4%	45.1%	30.4%	40.9%	34.1%	38.5%
Golf Cart rental or tour	23.8%	36.9%	11.0%	25.9%	26.8%	25.0%	23.7%	26.8%	11.5%
Just visit/socialize	24.3%	28.6%	20.5%	22.2%	29.6%	20.5%	19.4%	26.8%	34.6%
Hiking	15.3%	13.1%	16.4%	14.8%	23.9%	3.6%	17.2%	13.4%	15.4%
Visit art museum/gallery	10.9%	8.3%	11.0%	14.8%	16.9%	6.3%	11.8%	8.5%	15.4%
See historic or architectural sites	12.4%	14.3%	5.5%	14.8%	16.9%	6.3%	14.0%	11.0%	11.5%
Walking tour	13.9%	15.5%	11.0%	14.8%	15.5%	14.3%	17.2%	12.2%	7.7%
Zip-lining	11.4%	9.5%	11.0%	11.1%	18.3%	7.1%	6.5%	18.3%	7.7%
Parasailing	8.9%	11.9%	6.8%	7.4%	12.7%	8.0%	10.8%	7.3%	7.7%
Biking/bike tour	5.0%	6.0%	1.4%	7.4%	7.0%	1.8%	6.5%	3.7%	3.8%
Hummer/Jeep tour	6.4%	2.4%	6.8%	14.8%	9.9%	4.5%	6.5%	8.5%	0.0%
Camping	3.0%	0.0%	2.7%	11.1%	0.0%	0.0%	5.4%	1.2%	0.0%
Golfing	2.0%	2.4%	2.7%	0.0%	5.6%	0.0%	2.2%	1.2%	3.8%
Fishing	1.5%	1.2%	1.4%	0.0%	1.4%	0.9%	0.0%	1.2%	7.7%
Segway tours	2.0%	3.6%	0.0%	0.0%	1.4%	2.7%	3.2%	1.2%	0.0%
Attend a special event/concert	0.5%	1.2%	0.0%	0.0%	1.4%	0.0%	0.0%	0.0%	3.8%
Helicoptering/touring	0.5%	0.0%	0.0%	3.7%	0.0%	0.0%	1.1%	0.0%	0.0%
Other area activities/amusements	24.3%	26.2%	21.9%	22.2%	33.8%	17.9%	17.2%	31.7%	26.9%
None of the above	0.5%	1.2%	0.0%	0.0%	0.0%	0.9%	1.1%	0.0%	0.0%

AVALON RETAIL AREA & HARBOR TOP AREAS VISITED

- Over 70% each visited Avalon retail/village as well as the Harbor areas. Next-most were the Pier/Visitor Center at 57%, and Descanso Beach at 44%.
 - These were the top-4 areas visited by every segment.

Table 15 – Catalina Island Venues/Areas Visited

	Summer 2016	Residence			Overnight or Day		Age		
		LA Co.	So Cal	Other US	Hotel	Day Only	<39	40-59	60+
Base:	202	84	73	27	71	112	93	82	26
Avalon - retail district	76.7%	76.2%	75.3%	88.9%	73.2%	79.5%	71.0%	82.9%	76.9%
Avalon - harbor area	71.3%	69.0%	72.6%	70.4%	74.6%	67.0%	73.1%	72.0%	61.5%
Catalina Pier/Visitor Center	56.9%	61.9%	53.4%	55.6%	59.2%	55.4%	57.0%	58.5%	53.8%
Descanso Beach	44.1%	36.9%	47.9%	51.9%	53.5%	33.0%	49.5%	39.0%	42.3%
Catalina Island Museum	17.3%	14.3%	19.2%	18.5%	23.9%	12.5%	16.1%	14.6%	30.8%
Wrigley Gardens	16.3%	17.9%	15.1%	14.8%	22.5%	11.6%	16.1%	18.3%	7.7%
Island Interior/Conservancy areas	14.9%	14.3%	16.4%	14.8%	19.7%	9.8%	15.1%	19.5%	0.0%
Two Harbors	3.0%	1.2%	5.5%	3.7%	7.0%	0.9%	3.2%	1.2%	3.8%
Wrigley Institute	3.5%	3.6%	1.4%	11.1%	2.8%	2.7%	1.1%	6.1%	3.8%
Catalina Sea Camp/other camps	4.0%	2.4%	2.7%	11.1%	4.2%	1.8%	5.4%	3.7%	0.0%
Parsons Landing area/State Park	2.5%	2.4%	4.1%	0.0%	2.8%	2.7%	3.2%	1.2%	0.0%
Long Point area	1.5%	1.2%	1.4%	0.0%	2.8%	0.9%	3.2%	0.0%	0.0%
Other	16.8%	13.1%	16.4%	18.5%	11.3%	17.0%	11.8%	18.3%	30.8%
None of the above	0.5%	1.2%	0.0%	0.0%	1.4%	0.0%	1.1%	0.0%	0.0%

INTENTION TO REVISIT CATALINA IS STRONG FOR SUMMER VISITORS

- Over three-quarters, or 77% of Summer visitors indicated they are highly or somewhat likely to return to the island in the next year.
 - The overall mean rating is 4.0 out of 5, squarely on “somewhat likely.”
- Perhaps unsurprisingly, L A County and Southern California visitors said they were more likely to revisit, at 83% and 80% respectively, than those from outside the state at 59%.
 - This is likely due to proximity and thus opportunity to revisit rather than differences in their experience.

Table 16 – Likelihood/Intention to Return to Catalina Island

	Summer 2016	Residence			Overnight or Day		Age		
		LA Co.	So Cal	Other US	Hotel	Day Only	<39	40-59	60+
Base:	202	84	73	27	71	112	93	82	26
5. Highly likely	47.5%	50.0%	56.2%	25.9%	50.7%	43.8%	43.0%	54.9%	42.3%
4. Somewhat likely	29.2%	33.3%	23.3%	33.3%	25.4%	32.1%	32.3%	24.4%	34.6%
Net: High + Somewhat Likely	76.7%	83.3%	79.5%	59.3%	76.1%	75.9%	75.3%	79.3%	76.9%
3. Neutral/unsure	9.4%	8.3%	8.2%	14.8%	12.7%	7.1%	10.8%	8.5%	7.7%
2. Somewhat unlikely	5.0%	3.6%	6.8%	3.7%	2.8%	6.3%	5.4%	2.4%	7.7%
1. Highly/very unlikely	8.9%	4.8%	5.5%	22.2%	8.5%	10.7%	8.6%	9.8%	7.7%
Mean rating (5=Highly likely, 1=Highly unlikely):	4.0	4.2	4.2	3.4	4.1	3.9	4.0	4.1	4.0

Overnight Lodging

45% STAYED OVERNIGHT ON CATALINA ISLAND THIS SUMMER

- Overall, 53% of Catalina Island Summer visitor groups stayed overnight somewhere on their trip, thus 47% made day trips only on this trip (anywhere).
- Of any location, most overnight stays were on Catalina Island: 45% stayed one or more nights here, versus only 9% who stayed elsewhere in the Los Angeles area and 9% who stayed in other destinations.
 - Thus, slightly over half, or 55% of Catalina summer visitor groups were Day Visitors.
- Interestingly, while more Other U.S. visitors stayed overnight in other locations, about as many stayed on Catalina Island as LA County and other So Cal residents.
 - Also more older visitors, 54% ages 60+ stayed overnight versus 40% - 45% of younger visitors.

Table 17 – Overnight Visitation on Trip

Percent staying overnight	Summer 2016	Residence			Overnight or Day		Age		
		LA Co.	So Cal	Other US	Hotel	Day Only	<39	40-59	60+
Base:	202	84	73	27	71	112	93	82	26
Total % staying:	52.5%	42.9%	49.3%	85.2%	100.0%	14.3%	52.7%	50.0%	61.5%
Nights on Catalina Island	44.6%	41.7%	45.2%	44.4%	100.0%	0.0%	45.2%	41.5%	53.8%
Nights in Los Angeles area (other than Catalina)	8.9%	0.0%	2.7%	48.1%	4.2%	10.7%	9.7%	7.3%	11.5%
Nights in all other locations/destinations	8.9%	1.2%	4.1%	37.0%	9.9%	8.0%	8.6%	7.3%	15.4%

OVERNIGHT VISITORS STAYED ABOUT 2 NIGHTS ON CATALINA ISLAND

- Across all locations, all visitors spent an average of 1.6 nights away from home.
 - Those staying overnight (anywhere) spent an average of 2 nights away.
- On Catalina Island, all visitors spent an average of 0.9 nights on this trip.
 - Catalina Island overnight visitors spent an average of 2 nights here.
- Among Catalina overnight visitors, LA County residents stayed fewer nights, 1.6, versus 2 nights for Southern Californians and 2.75 nights for Other U.S. visitors.

Table 18 – Average Nights Stayed in Locations on Trip

Mean nights per respondent	Summer 2016	Residence			Overnight or Day		Age		
		LA Co.	So Cal	Other US	Hotel	Day Only	<39	40-59	60+
Base:	202	84	73	27	71	112	93	82	26
Total	1.58	0.71	1.08	5.19	1.97	0.90	1.78	1.22	2.12
Nights on Catalina Island	0.88	0.68	0.90	1.22	1.68	0.00	0.91	0.62	1.58
Nights in Los Angeles area (other than Catalina)	0.42	0.00	0.03	2.22	0.11	0.58	0.69	0.38	0.19
Nights in all other locations/destinations	0.50	0.05	0.21	1.48	0.86	0.33	0.74	0.30	0.54
Minimum Base: Overnight	18	35	33	10	71	12	42	34	14
Total	3.02	1.67	2.19	6.09	1.97	6.31	3.39	2.44	3.44
Nights on Catalina Island	1.98	1.63	2.00	2.75	1.68	*	2.02	1.50	2.93
Nights in Los Angeles area (other than Catalina)	4.67	*	*	4.62	*	5.42	*	*	*
Nights in all other locations/destinations	5.56	*	*	4.00	*	*	*	*	*

MOST ISLAND OVERNIGHT VISITORS STAYED IN A HOTEL/MOTEL

- As noted, 35% of *all* Summer visitors stayed in a Catalina Island hotel/motel.
- Of *overnight* guests, three-quarters, or 78% stayed in a Catalina Island hotel/motel, with far fewer, less than 10% in each other type of lodging.
 - Of note, 19% of Other U.S. visitors stayed in private unpaid or other lodging.

Table 19 – Catalina Island Lodging

	Summer 2016	Residence			Age		
		LA Co.	So Cal	Other US	<39	40-59	60+
Base:	202	84	73	27	93	82	26
Day Visitor	55.4%	58.3%	54.8%	55.6%	54.8%	58.5%	46.2%
Hotel/Motel	35.1%	36.9%	34.2%	25.9%	35.5%	34.1%	38.5%
Private/Other	9.4%	4.8%	11.0%	18.5%	9.7%	7.3%	15.4%
Base: Overnight on SCI	90	35	33	12	42	34	14
Hotel or motel	77.8%	85.7%	75.8%	58.3%	76.2%	82.4%	71.4%
Camping	8.9%	0.0%	9.1%	33.3%	11.9%	8.8%	0.0%
Private paid vacation rental like airbnb, VRBO	3.3%	2.9%	6.1%	0.0%	4.8%	2.9%	0.0%
Private unpaid residence of friends, family	4.4%	5.7%	3.0%	0.0%	2.4%	2.9%	14.3%
On-board private boat	4.4%	2.9%	6.1%	8.3%	2.4%	2.9%	14.3%
Bed & Breakfast Inn	1.1%	2.9%	0.0%	0.0%	2.4%	0.0%	0.0%
Other	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%

PAID LODGING RESERVED 2 – 3 WEEKS IN ADVANCE OF TRIP

- 80% of guests in paid lodging made an advance reservation; those who did reserved an average of 2.3 weeks in advance.
- The farther from Catalina Island the longer the advance reservation period, ranging from 1.5 weeks for L A County and 2.3 weeks for So. Californians, to 3.1 weeks for Other U.S. visitors

Table 20 – Advance Reservation Period

Weeks reserved in advance	Summer 2016	Residence			Hotel	Age		
		LA Co.	So Cal	Other US		<39	40-59	60+
Base: SCI paid lodging guests	82	32	30	11	71	40	32	10
0 (Did not plan ahead/decided or reserved here)	19.5%	31.3%	10.0%	9.1%	21.1%	17.5%	28.1%	0.0%
1 week	15.9%	18.8%	16.7%	18.2%	15.5%	12.5%	21.9%	10.0%
2 weeks	18.3%	9.4%	30.0%	9.1%	15.5%	25.0%	12.5%	10.0%
3-4 weeks	26.8%	15.6%	30.0%	45.5%	28.2%	27.5%	25.0%	30.0%
5-8 weeks	14.6%	18.8%	10.0%	9.1%	15.5%	12.5%	6.3%	50.0%
9-12 weeks	3.7%	6.3%	3.3%	0.0%	4.2%	5.0%	3.1%	0.0%
More than 12 weeks	1.2%	0.0%	0.0%	9.1%	0.0%	0.0%	3.1%	0.0%
Median (weeks):	2.30	1.50	2.28	3.10	2.36	2.30	1.50	4.50

OVER HALF MADE THEIR PAID LODGING RESERVATIONS ONLINE

- Over half, or 55% of those staying in Catalina Island paid lodging made their reservation by internet, with 35% using the lodging website and 29% using a general travel website.
- This reservation pattern varied both by age and by residence, with about twice as many younger visitors and those from So. California and Other U.S. reserving via the hotel website rather than a general website versus other segments.

Table 21 – Method of Reserving Paid Lodging

	Summer 2016	Residence			Hotel	Age		
		LA Co.	So Cal	Other US		<39	40-59	60+
Base: CI paid lodging guest	82	32	30	11	71	40	32	10
On a travel website like hotels.com, Travelocity etc.	29.3%	37.5%	26.7%	9.1%	33.8%	22.5%	34.4%	40.0%
On the lodging's website	35.4%	21.9%	43.3%	45.5%	35.2%	42.5%	28.1%	30.0%
By call to the lodging or lodging's "800" reservation number	19.5%	21.9%	16.7%	18.2%	21.1%	22.5%	12.5%	30.0%
My company booked it	2.4%	0.0%	6.7%	0.0%	2.8%	0.0%	6.3%	0.0%
Through a travel agent	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Through r tour arranger or operator	2.4%	0.0%	0.0%	18.2%	0.0%	2.5%	3.1%	0.0%
Through other vacation rental agency	1.2%	0.0%	0.0%	9.1%	0.0%	0.0%	3.1%	0.0%
Through vacation shared housing agency like airbnb	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Other	9.8%	18.8%	6.7%	0.0%	7.0%	10.0%	12.5%	0.0%

VIRTUALLY ALL TRAVELING INDEPENDENTLY

- This Summer, only 4% were on a package or guided tour; thus, the vast majority of visitors were traveling independently.
 - Of note 15% of those from Other U.S. were on a tour for some part of their trip.

Table 22 – On a Tour

On a Guided Tour	Summer 2016	Residence			Overnight or Day		Age		
		LA Co.	So Cal	Other US	Hotel	Day Only	<39	40-59	60+
Base:	202	84	73	27	71	112	93	82	26
No	96.5%	98.8%	98.6%	85.2%	98.6%	96.4%	96.8%	96.3%	96.2%
Yes	3.5%	1.2%	1.4%	14.8%	1.4%	3.6%	3.2%	3.7%	3.8%

DAY VISITORS (ACROSS SEGMENTS) AVERAGED NEARLY 7 HOURS ON CATALINA

Table 23 – Hours on Catalina Island (Day Visitors)

	Summer 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

STRONG DAILY GROUP SPEND OF \$298, \$122 PER-CAPITA

Spending Incidence

- Overall, 99% of Summer visitor groups spent money on Catalina Island.
- Nearly all, or 93% of groups spent on meals/snacks, while most, 69% spent on beverages. 56% spent on shopping/gifts, 45% spent on tours/activities, and 40% spent for paid lodging.

Group Daily Spending Amount*

- All Summer visitor groups spent an average total of \$298 per-day on Catalina Island.
- The highest categories were lodging at \$80 and snacks/meals at \$76 average per-day, followed by tours/activities at \$44, and shopping/gifts at \$36.
 - Reported nightly lodging rate averaged \$196 per group.
- Hotel groups spent twice as much as Day visitor groups: \$450 versus \$222 per day, the higher amount mainly for lodging, meals and for other items.

Per-Capita Daily Spending*

- On an average daily *per-capita* basis each Summer visitor spent \$122.

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

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

Table 24 – Spending Incidence

Percent spending	Summer 2016	Residence			Overnight or Day		Age		
		LA Co.	So Cal	Other US	Hotel	Day Only	<39	40-59	60+
Base:	202	84	73	27	71	112	93	82	26
Total	98.5%	97.6%	98.6%	100.0%	100.0%	98.2%	97.8%	100.0%	96.2%
Meals out/snacks	93.1%	95.2%	91.8%	88.9%	94.4%	94.6%	91.4%	97.6%	84.6%
Drinks/beverages	69.3%	73.8%	69.9%	66.7%	77.5%	67.0%	74.2%	69.5%	50.0%
Shopping/gifts/souvenirs/specialty items	55.9%	56.0%	56.2%	59.3%	56.3%	58.0%	50.5%	59.8%	61.5%
Lodging	40.1%	36.9%	41.1%	40.7%	98.6%	0.0%	41.9%	39.0%	38.5%
Fees for activities, tours, equipment, etc.	44.6%	51.2%	41.1%	40.7%	42.3%	48.2%	48.4%	45.1%	26.9%
Transportation (ferry fares, cart rental, etc.)	30.2%	41.7%	16.4%	40.7%	23.9%	36.6%	33.3%	32.9%	7.7%
Groceries/personal items/other	21.3%	25.0%	20.5%	18.5%	31.0%	11.6%	17.2%	23.2%	30.8%
Museum/theater/club admission	11.9%	9.5%	12.3%	11.1%	11.3%	8.9%	9.7%	14.6%	11.5%
Amenities like spa, grooming or health club	3.5%	4.8%	1.4%	7.4%	5.6%	0.9%	4.3%	2.4%	3.8%
Fine arts/home decor	1.5%	2.4%	1.4%	0.0%	1.4%	0.0%	1.1%	0.0%	7.7%

AVERAGE DAILY GROUP SPENDING

Table 25 – Average Daily Group Spending by Category

Mean spending per respondent	Summer 2016	Residence			Overnight or Day		Age		
		LA Co.	So Cal	Other US	Hotel	Day Only	<39	40-59	60+
Base:	202	84	73	27	71	112	93	82	26
Total	297.97	325.17	284.25	311.70	450.42	221.75	288.13	320.54	249.06
Lodging*	79.88	85.00	86.85	57.53	211.73	0.00	80.45	82.62	80.00
Meals out/snacks	75.86	84.77	69.22	67.78	90.00	66.87	62.83	88.67	64.81
Shopping/gifts/souvenirs/specialty items	35.78	28.54	38.77	47.85	35.66	37.90	23.29	47.70	45.38
Fees for activities, tours, passes equipment, etc.	44.27	58.31	38.67	44.04	40.77	49.60	46.59	51.99	28.62
Drinks/beverages	20.74	21.05	24.19	16.15	24.72	21.46	22.17	23.93	10.19
Transportation (ferry fares, cart rental, etc.)	21.62	24.49	14.49	53.22	10.62	35.71	27.01	19.66	4.23
Groceries/personal items/other	5.25	5.43	7.47	3.15	8.75	1.47	3.94	5.98	9.62
Amenities: spa, grooming, health club	4.01	6.19	2.74	3.33	6.34	1.34	5.91	3.05	0.38
Museum/theater/club admission	2.96	2.43	3.89	2.11	3.45	2.38	1.85	5.29	1.23
Fine arts/home decor	0.30	0.31	0.48	0.00	0.01	0.00	0.27	0.00	1.38

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.

AVERAGE DAILY PER-CAPITA SPENDING

Table 26 - Per-Capita Daily Spending

Mean spending per individual visitor	Summer 2016	Residence			Overnight or Day		Age		
		LA Co.	So Cal	Other US	Hotel	Day Only	<39	40-59	60+
Base:	202	84	73	27	71	112	93	82	26
Total	122.38	129.47	113.50	128.33	189.23	90.85	122.10	124.81	101.59
Lodging*	32.66	32.31	33.29	22.42	88.22	0.00	34.71	31.02	35.97
Meals out/snacks	30.96	34.09	28.76	30.45	38.26	27.59	27.90	35.28	25.98
Fees for activities, tours, equipment, etc.	18.74	22.98	17.92	16.67	17.11	20.10	18.85	21.32	12.40
Shopping/gifts/souvenirs/specialty items	13.77	12.72	14.38	20.70	14.34	14.94	10.75	17.42	20.45
Drinks/beverages	8.62	9.66	8.76	6.34	10.39	8.32	9.58	8.75	4.14
Transportation (ferry fares, cart rental, etc.)	9.14	11.05	6.03	20.78	4.60	14.04	10.88	8.04	1.83
Groceries/personal items/other	2.10	2.16	2.61	1.27	3.73	0.53	1.89	2.16	4.17
Amenities: spa, grooming, health club	1.59	2.44	1.05	1.34	2.59	0.52	2.46	1.14	0.17
Museum/theater/club admission	1.12	0.96	1.49	0.85	1.41	0.68	0.77	1.95	0.53
Fine arts/home decor	0.12	0.12	0.18	0.00	0.01	0.00	0.11	0.00	0.60

Note: spending allocated to all visitors (per-capita) whether or not they spent in that category.

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

Trip Characteristics & Visitor Demographics

MAINLY FAMILIES AND COUPLES; FEW SOLO TRAVELERS

- Summer travel groups were mainly families with children, 35%, or couples, at 34%; only 10% were traveling alone.
- More 44% of Hotel guests were couples versus 39% families, somewhat surprising for Summer.

Table 27 – Travel Group Composition

	Summer 2016	Residence			Overnight or Day		Age		
		LA Co.	So Cal	Other US	Hotel	Day Only	<39	40-59	60+
Base:	202	84	73	27	71	112	93	82	26
A couple	33.7%	34.5%	32.9%	40.7%	43.7%	27.7%	35.5%	31.7%	34.6%
A family group - parents and children	34.7%	38.1%	34.2%	29.6%	39.4%	33.0%	33.3%	37.8%	30.8%
A group of friends or co-workers	10.9%	8.3%	15.1%	3.7%	5.6%	16.1%	15.1%	8.5%	0.0%
Alone	10.4%	9.5%	8.2%	7.4%	5.6%	12.5%	10.8%	8.5%	15.4%
Extended family - multi generation	5.4%	3.6%	8.2%	7.4%	4.2%	4.5%	2.2%	6.1%	15.4%
A mixed group of family and friends	2.5%	4.8%	0.0%	3.7%	0.0%	4.5%	1.1%	4.9%	0.0%
Other	2.5%	1.2%	1.4%	7.4%	1.4%	1.8%	2.2%	2.4%	3.8%

ONE IN FOUR GROUPS INCLUDED CHILDREN

- Groups averaged 2.88 persons this Summer,
- Overall, one-quarter, or 27% of groups traveled with someone under age 18.
 - This proportion was higher among middle-aged adults, and Southern California residents outside LA County more generally.
 - Not surprisingly, fewer younger adults, 19% were traveling with children.

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

	Summer 2016	Residence			Overnight or Day		Age		
		LA Co.	So Cal	Other US	Hotel	Day Only	<39	40-59	60+
Base:	202	84	73	27	71	112	93	82	26
Adult only travel group	73.3%	77.4%	61.6%	85.2%	69.0%	75.9%	80.6%	65.9%	73.1%
Traveling with children under 18	26.7%	22.6%	38.4%	14.8%	31.0%	24.1%	19.4%	34.1%	26.9%
Mean total number/group	2.88	2.98	2.77	3.30	2.62	2.94	2.65	2.98	3.46

46% MARRIED/PARTNERED; 35% SINGLE; 25% HAVE CHILDREN AT HOME

Table 29 – Household Composition

	Summer 2016	Residence			Overnight or Day		Age		
		LA Co.	So Cal	Other US	Hotel	Day Only	<39	40-59	60+
Base:	202	84	73	27	71	112	93	82	26
Married/partnered without children under age 18 at home	26.2%	21.4%	32.9%	40.7%	26.8%	26.8%	17.2%	29.3%	50.0%
Single adult without children under age 18 at home	29.2%	27.4%	24.7%	33.3%	28.2%	29.5%	35.5%	19.5%	38.5%
Married/partnered with children under age 18 at home	19.3%	17.9%	26.0%	11.1%	21.1%	17.9%	15.1%	26.8%	7.7%
Household with adult children over age 18 at home	11.9%	14.3%	9.6%	3.7%	8.5%	14.3%	12.9%	14.6%	0.0%
Single adult with children under age 18 at home	4.0%	7.1%	2.7%	0.0%	7.0%	2.7%	4.3%	4.9%	0.0%
Group of unrelated adults	1.5%	1.2%	1.4%	3.7%	2.8%	0.0%	3.2%	0.0%	0.0%
Own or extended family with children under age 18 at home	1.5%	1.2%	0.0%	0.0%	1.4%	0.9%	3.2%	0.0%	0.0%
Other	6.4%	9.5%	2.7%	7.4%	4.2%	8.0%	8.6%	4.9%	3.8%

ABOUT 4% OVERALL IDENTIFIED AS LGBT

Table 30 – Sexual Orientation

	Summer 2016	Residence			Overnight or Day		Age		
		LA Co.	So Cal	Other US	Hotel	Day Only	<39	40-59	60+
Base:	202	84	73	27	71	112	93	82	26
Heterosexual	94.1%	91.7%	98.6%	92.6%	93.0%	93.8%	91.4%	96.3%	96.2%
Gay male	2.0%	2.4%	0.0%	7.4%	2.8%	1.8%	3.2%	1.2%	0.0%
Lesbian	1.5%	2.4%	1.4%	0.0%	0.0%	2.7%	2.2%	1.2%	0.0%
Other	1.5%	3.6%	0.0%	0.0%	2.8%	0.9%	1.1%	1.2%	3.8%
Refused	1.0%	0.0%	0.0%	0.0%	1.4%	0.9%	2.2%	0.0%	0.0%

HALF OF CATALINA ISLAND U.S. VISITORS IDENTIFY AS CAUCASIAN

- Thus, half of Summer visitors were other cultural groups including 28% Hispanic/ Latino, 11% Asian-American, 6% African-American and 4% Pacific Islander.

Table 3I – Ethnicity Demographics

	Summer 2016	Residence			Overnight or Day		Age		
		LA Co.	So Cal	Other US	Hotel	Day Only	<39	40-59	60+
Base: US resident	198	84	73	27	70	109	90	81	26
Caucasian (non-Hispanic)	49.0%	40.5%	57.5%	59.3%	54.3%	39.4%	33.3%	51.9%	96.2%
Hispanic/Latino	28.3%	35.7%	21.9%	22.2%	22.9%	33.9%	36.7%	28.4%	0.0%
Asian-American	11.1%	10.7%	11.0%	3.7%	12.9%	11.9%	17.8%	7.4%	0.0%
African-American	5.6%	6.0%	5.5%	3.7%	4.3%	7.3%	5.6%	7.4%	0.0%
Pacific Islander	3.5%	4.8%	2.7%	3.7%	1.4%	5.5%	3.3%	3.7%	0.0%
Native American	0.5%	0.0%	0.0%	3.7%	1.4%	0.0%	0.0%	0.0%	3.8%
Other group	4.0%	4.8%	2.7%	7.4%	7.1%	2.8%	6.7%	2.5%	0.0%
Prefer not to disclose	0.5%	1.2%	0.0%	0.0%	1.4%	0.0%	1.1%	0.0%	0.0%

ADULT SUMMER VISITORS AVERAGE AGE EARLY-40s; 37% AGE 50+

Table 32 – Respondent Age

	Summer 2016	Residence			Overnight or Day		Age		
		LA Co.	So Cal	Other US	Hotel	Day Only	<39	40-59	60+
Base: reported age	201	84	72	27	71	111	93	82	26
18-29	23.9%	29.8%	18.1%	14.8%	18.3%	27.0%	51.6%	0.0%	0.0%
30-39	22.4%	21.4%	20.8%	25.9%	28.2%	18.9%	48.4%	0.0%	0.0%
40-49	18.9%	20.2%	20.8%	18.5%	18.3%	20.7%	0.0%	46.3%	0.0%
50-59	21.9%	19.0%	25.0%	25.9%	21.1%	22.5%	0.0%	53.7%	0.0%
60-69	7.5%	4.8%	9.7%	11.1%	8.5%	6.3%	0.0%	0.0%	57.7%
70+	5.5%	4.8%	5.6%	3.7%	5.6%	4.5%	0.0%	0.0%	42.3%
Median:	41.47	38.94	44.83	44.50	41.42	41.46	29.13	50.18	68.17

SUMMER VISITORS REPORT \$74,500 ANNUAL MEDIAN HOUSEHOLD INCOME

- There are notable differences between segments.
 - Highest median household income ranged from Southern California residents at \$90,200, 40-59 year olds at \$91,300, to adults 60+ at \$95,800.
 - The lowest income group was expectedly younger adults at \$61,900.
- About one-third, 32% report median annual income of \$100,000+.

Table 33 – Median Annual Household Income

	Summer 2016	Residence			Overnight or Day		Age		
		LA Co.	So Cal	Other US	Hotel	Day Only	<39	40-59	60+
Base: Valid respondent	176	75	67	22	60	99	79	75	21
Under \$30,000	11.4%	9.3%	11.9%	4.5%	10.0%	12.1%	19.0%	5.3%	4.8%
\$30,000 - \$49,999	13.1%	14.7%	7.5%	22.7%	6.7%	16.2%	19.0%	8.0%	9.5%
\$50,000 - \$74,999	26.1%	36.0%	17.9%	18.2%	25.0%	27.3%	25.3%	28.0%	23.8%
\$75,000 - \$99,999	17.6%	13.3%	20.9%	27.3%	15.0%	19.2%	22.8%	13.3%	14.3%
\$100,000 - \$199,999	20.5%	20.0%	22.4%	18.2%	26.7%	18.2%	10.1%	30.7%	19.0%
\$200,000 - \$500,000	10.2%	4.0%	19.4%	9.1%	15.0%	6.1%	1.3%	14.7%	28.6%
Over \$500,000	1.1%	2.7%	0.0%	0.0%	1.7%	1.0%	2.5%	0.0%	0.0%
Median: (\$)	74,457	68,056	90,179	79,167	88,889	69,907	61,875	91,250	95,833

RESPONDENT GENDER SKEWED 60% FEMALE

Table 34 – Gender

	Summer 2016	Residence			Overnight or Day		Age		
		LA Co.	So Cal	Other US	Hotel	Day Only	<39	40-59	60+
Base:	202	84	73	27	71	112	93	82	26
Female	60.4%	61.9%	57.5%	63.0%	56.3%	62.5%	58.1%	61.0%	65.4%
Male	39.6%	38.1%	42.5%	37.0%	43.7%	37.5%	41.9%	39.0%	34.6%

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

CATALINA EXPERIENCE SEEN AS RELAXING, FUN, AND GOOD/GREAT

Table 35 – Words Describing Catalina Island Experience

	Summer 2016	Residence			Overnight or Day		Age		
		LA Co.	So Cal	Other US	Hotel	Day Only	<39	40-59	60+
Base:	202	84	73	27	71	112	93	82	26
Relaxing	16.8%	17.9%	17.8%	11.1%	19.7%	15.2%	19.4%	13.4%	15.4%
Fun	14.9%	14.3%	20.5%	7.4%	15.5%	13.4%	19.4%	11.0%	11.5%
Good/Great	13.9%	13.1%	9.6%	14.8%	12.7%	14.3%	10.8%	14.6%	23.1%
Beautiful	5.4%	6.0%	5.5%	7.4%	5.6%	5.4%	3.2%	7.3%	7.7%
Awesome	5.9%	6.0%	6.8%	3.7%	5.6%	6.3%	6.5%	6.1%	3.8%
Amazing	4.5%	6.0%	1.4%	11.1%	1.4%	7.1%	5.4%	3.7%	3.8%
Nice	3.0%	2.4%	2.7%	3.7%	0.0%	4.5%	4.3%	2.4%	0.0%
Fantastic	5.0%	3.6%	5.5%	11.1%	4.2%	6.3%	3.2%	7.3%	3.8%
Excellent	5.0%	6.0%	4.1%	3.7%	5.6%	3.6%	3.2%	7.3%	3.8%
Wonderful	2.0%	2.4%	0.0%	3.7%	1.4%	1.8%	1.1%	3.7%	0.0%
Enjoyable	3.0%	2.4%	5.5%	0.0%	2.8%	3.6%	3.2%	3.7%	0.0%
Peaceful	1.0%	0.0%	1.4%	3.7%	1.4%	0.9%	1.1%	0.0%	3.8%
Pleasant	2.0%	2.4%	2.7%	0.0%	2.8%	1.8%	1.1%	1.2%	7.7%
Lovely	1.0%	1.2%	1.4%	0.0%	1.4%	0.0%	0.0%	1.2%	3.8%

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

Table 36 -- Summer Interview Locations

	Summer 2016
Base:	202
Cabrillo Mole (Catalina Express/Flyer landing)	27.2%
Avalon - Crescent	20.3%
Avalon Harbor/ Beaches	20.8%
Avalon Pier/Dinghy Dock	8.9%
Tour Plaza	8.4%
Descanso Beach	5.4%
Airport	5.9%
Island Express Helipad	0.5%
Other location	2.5%

READING THE REPORT TABLES & CHARTS

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

Sample Table/Headings

	Summer 2016	Residence			Overnight or Day		Age		
		LA Co.	So Cal	Other US	Hotel	Day Only	<39	40-59	60+
Base:	202	84	73	27	71	112	93	82	26

- **Season:** Total for the season shown
 - **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 motel, or visiting Catalina Island for the day only. Non-hotel lodging was excluded due to insufficient sample size.
- 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 for this season has an error factor of +/- 6.9% at the 95% confidence level.