



Love Catalina Island
Stakeholder Community Survey
June 2022

Methodology

- Love Catalina Island partnered with Strategic Marketing & Research Insights (SMARInsights) to develop and distribute an online survey of its stakeholders. The survey was available to people who live and work on the Island, including Love Catalina Island's members. The survey was available April 14 through June 6, 2022.
- SMARInsights programmed the survey on its Conformat platform and hosted the link on its website. Love Catalina distributed the survey to its email list and promoted its availability through a variety of methods, including a postcard delivered to all Avalon PO boxes.
- A total of 180 surveys were completed.
- This report is organized into four sections:
 1. Community sentiment
 2. Attitudes about tourism
 3. Love Catalina Island's mission and vision
 4. Member satisfaction
 5. Reaction to advertising

Sample Characteristics

- The sample included a distribution of respondents across categories.

Resident Status	
I am a full-time resident of Catalina Island	83%
I have a second home on Catalina Island	10%
I work on Catalina Island and live off the island	6%
I own a boat mooring at Catalina Island	3%
I own a vacation rental property on the island	6%

Location of Residence	
Avalon	91%
Mainland (City)	4%
Two Harbors	2%
Island Interior/Coves	1%

Years of Residency	
1-5 years	19%
11-20 years	23%
6-10 years	18%
21+ years	40%

Love Catalina Membership Status	
Not a member	45%
I don't know	11%
Former member	5%
Member	40%

Age	
55+	62%
35-54	24%
18-34	13%

Employment	
At a place that receives a great deal of benefit from visitors to the island	47%
At a place that receives some benefit from visitors to the island	13%
A place that receives no benefit from visitors to the island	14%
Unemployed, seeking work	2%
Retired	24%

Insights

The people who live and work on Catalina Island are proud of their community.

- Nine-in-ten give the Island 5-stars for its natural scenery, and more than half give high marks for the ease of getting around, friendliness, and the variety of available activities.
- The cost of living and housing are top concerns, and the use of housing for visitors is seen as contributing to the lack of affordability and is creating pressure on staffing with 59% of Love Catalina's members unable to fill vacant positions.

Residents agree that tourism is good for the community, and 75% strongly agree.

- There is strong recognition that tourism helps small businesses and provides jobs that people need. And, majorities agree that tourism supports amenities and makes the community a nicer place to live.

Stakeholders see the value of tourism promotion and agree that the investment of TOT funds to attract visitors is good for the community.

- One-in-four members feel that tourism promotion is underfunded, but most are neutral on this issue. Only 15% agree that occupancy is low compared to the competition, despite lodging performance reports that indicate that some segments of the local market continue to lag behind competitors.

Insights

Members and non-members agree that the mission of Love Catalina reflects the work of the organization.

- There is agreement, although to a lesser extent, that the vision aligns. This is, in part, driven by the aspect of conservation. Love Catalina may need to educate the community on their efforts in this area or identify additional strategies that resonate with the community.

Member satisfaction is extraordinarily high.

- 60% of members are Very Satisfied with their overall benefits and the value they receive for dues.
- Love Catalina Island achieved a target mean score of 4.00 or higher on every aspect of membership. Highest marks were given for reporting, quality of promotions, staff leadership, and COVID response.
- Members also gave high ratings for the value they receive from events. Non-member see less value in Love Catalina's events.

Insights

Most members report business levels equal to or higher than pre-pandemic levels.

- More than two-thirds are optimistic about 2022.
- Staffing levels are lower than before the pandemic due to difficulty filling vacant positions.
- Members see several factors as important to the recovery including transportation, the cost of visiting, domestic travelers and workforce. But, when asked to select one most important factor, the cost of visiting was selected by a plurality of 32%.

82% of survey participants recalled seeing digital advertising by Love Catalina Island, and 48% recalled seeing video ads.

- Two-thirds had a positive reaction to the ads and very few were negative.

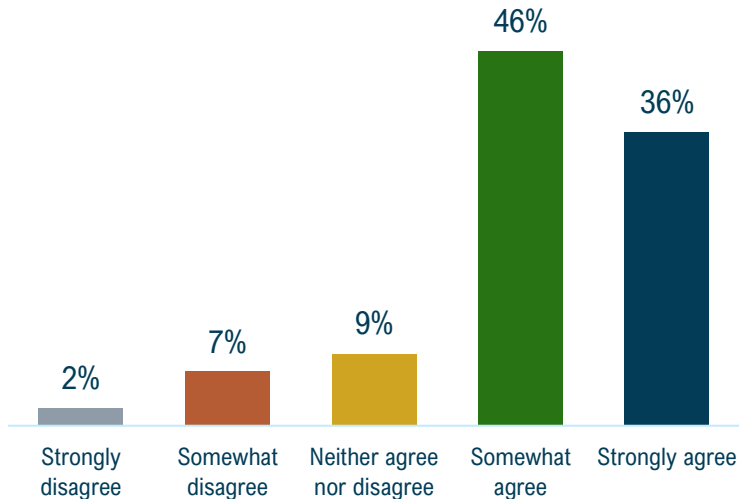
Community Sentiment

Community Pride

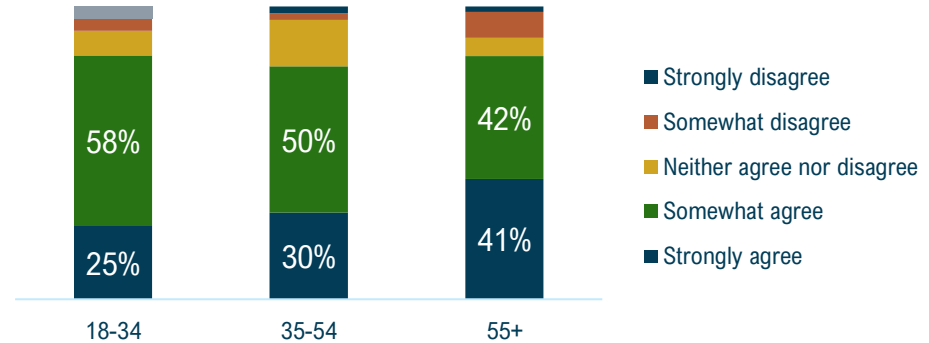
The community is proud of Catalina Island.

- Length of residency is not a factor.
- Older residents have the strongest levels of pride.

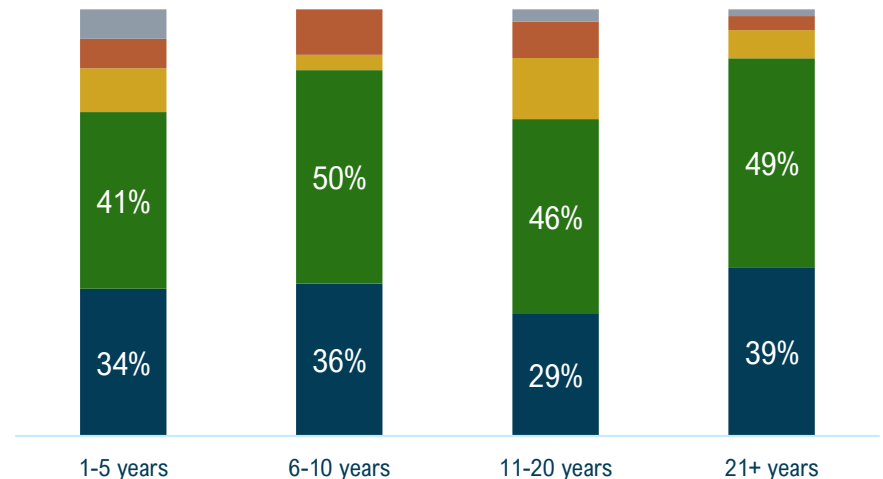
I am proud of my community



Pride by Age



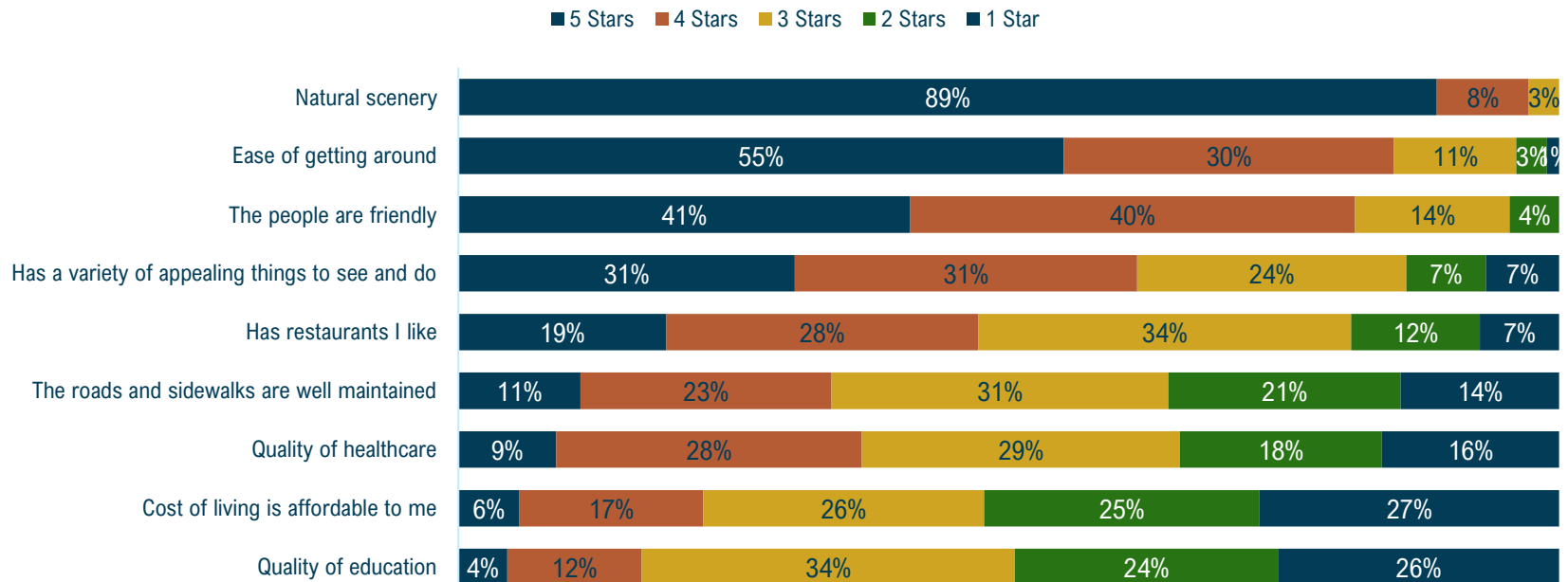
Pride by Years of Residency



Community Sentiment

Catalina Island gets high marks for its natural scenery, the ease of getting around, and its friendly people.

- Only two-thirds give 4 or 5 stars for the variety of things to do and less than half give highest marks for restaurants.
- Ratings are low for infrastructure, healthcare, the cost of living, and education.



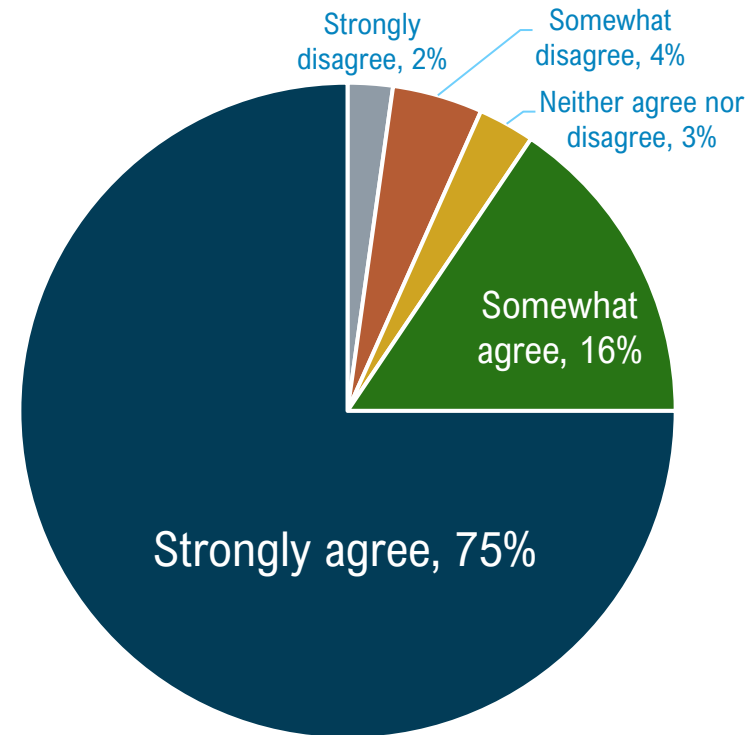
Attitudes about Tourism

Tourism Sentiment

Residents agree that tourism is good for the community of Catalina Island.

- 75% Strongly Agree

Tourism is Good for the Community

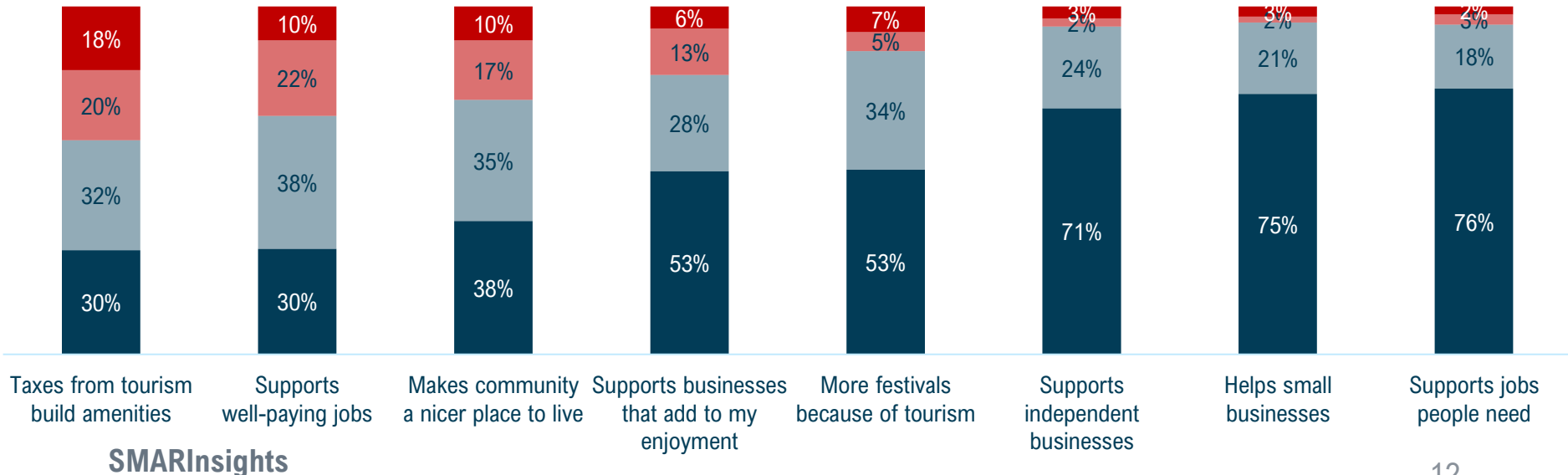


Benefits of Tourism

Nine-in-10 community members agree that tourism supports independent businesses and jobs.

- More than 75% agree that there are more festivals and businesses to enjoy because of tourism.
- A majority agree that tourism supports *well-paying* jobs and generates taxes that build amenities that make Catalina Island a better place to live.

■ Strongly agree
 ■ Somewhat agree
 ■ Somewhat disagree
 ■ Strongly disagree

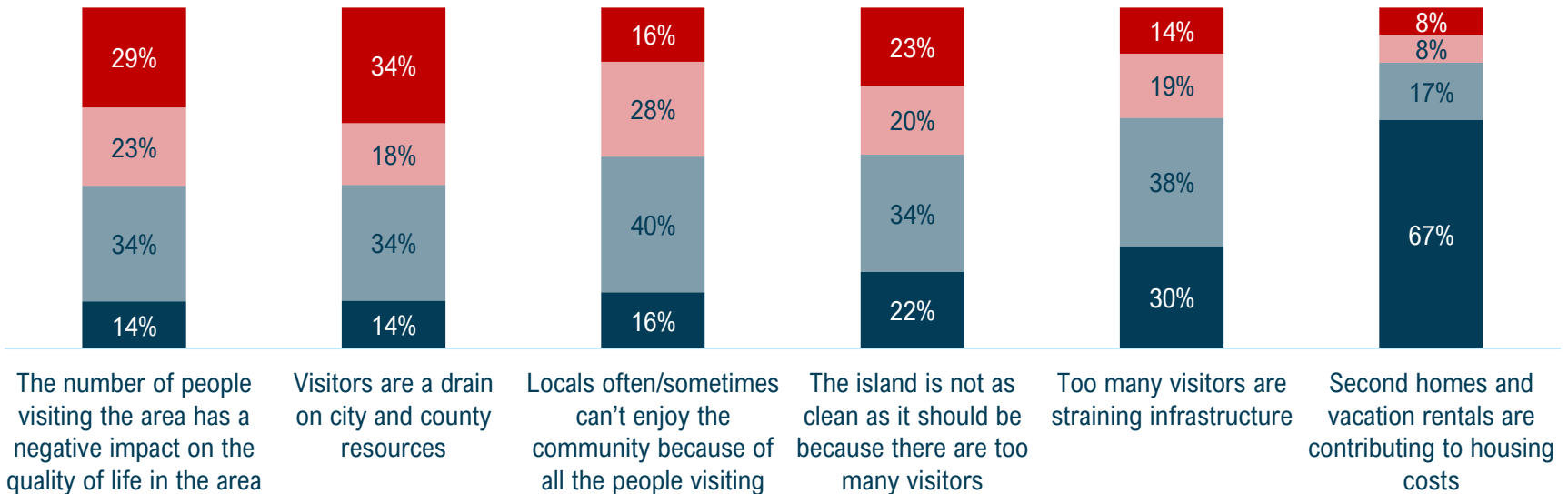


Impacts of Tourism

The cost of housing is among the biggest concerns, and second homes/vacation rentals are seen as major contributors.

- Less than half of the community thinks the number of visitors is having a negative impact and draining city and county resources.

■ Strongly agree
 ■ Somewhat agree
 ■ Somewhat disagree
 ■ Strongly disagree

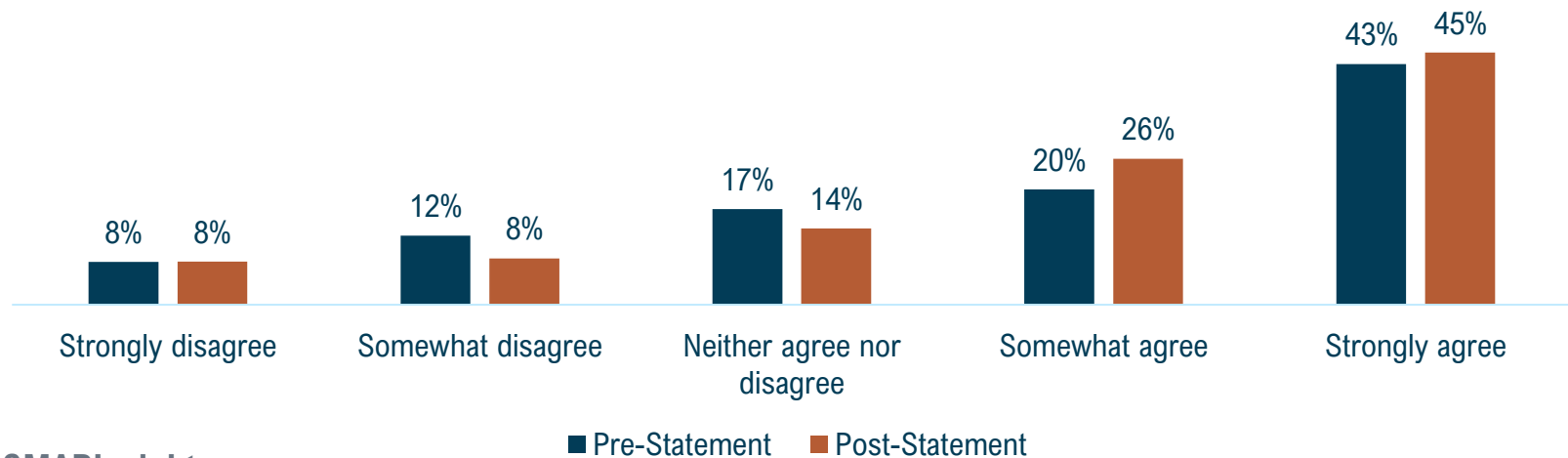


Tourism Promotion Value

There is strong support for TOT-funded tourism promotion.

- More than two-thirds of stakeholders agree that the investment to attract visitors is good for the community.
- Survey participants rated their agreement for tourism promotion before and after seeing a statement that the TOT is paid by overnight visitors. This had only a small effect indicating that the community is knowledgeable about how marketing the island is funded.

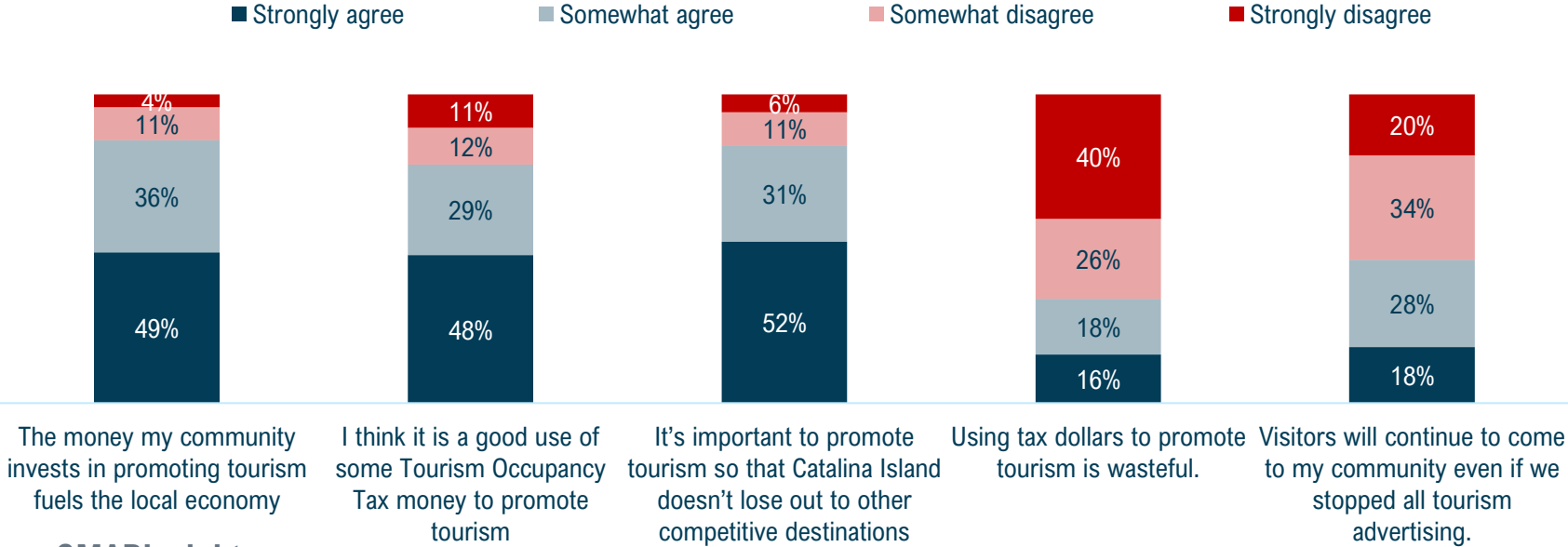
TOT-Funded Tourism Promotion is Good for the Community



Tourism Promotion Sentiment

The community overwhelmingly agrees that tourism promotion fuels the economy and is a good use of some of the TOT revenue. They believe it is important to continue to advertise the island for visitation.

- More than two-thirds think it is NOT wasteful use tax dollars to promote tourism. And fewer than half think that visitors would come if tourism advertising was discontinued.



Love Catalina Island's Mission & Vision

Mission

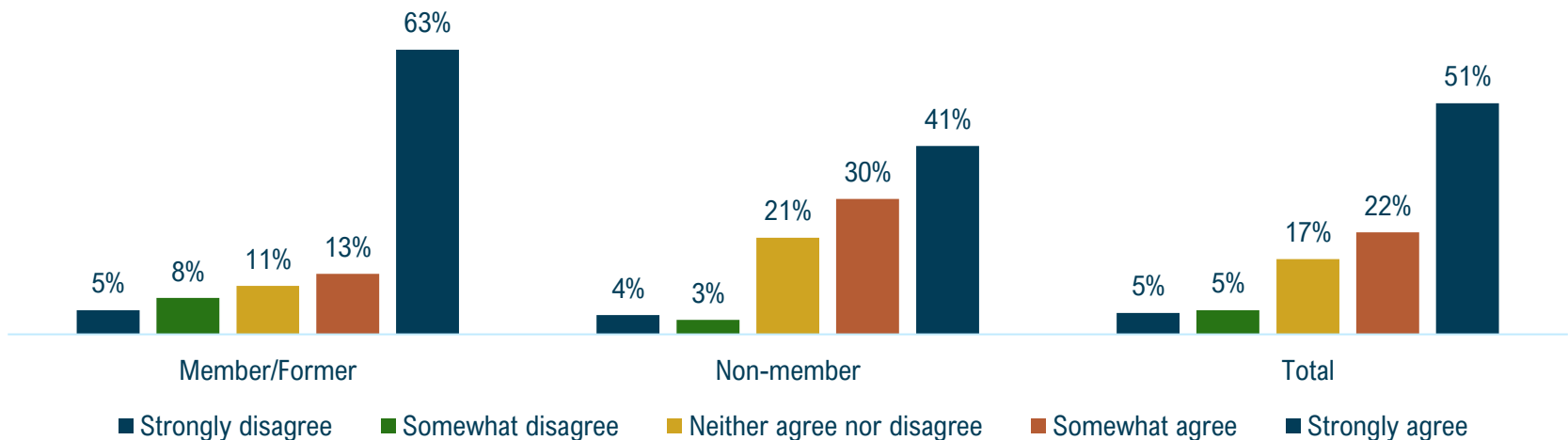
Love Catalina Mission

To attract visitors and advocate for commerce on Catalina Island.

More than three-fourths of members agree that Love Catalina's mission reflects the work of the organization.

- Most non-members also agree, and very few disagree.

The mission reflects the work of the organization



Vision

Love Catalina Vision

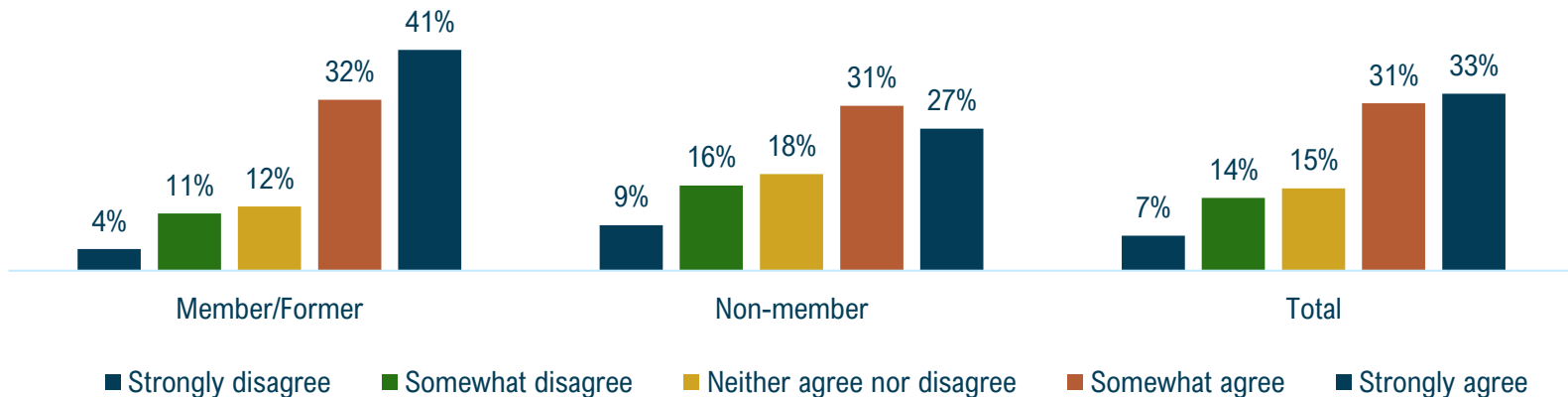
Avalon and Catalina Island make up a community where tourism promotion and economic vitality are supported by residents, local business, and civic leaders to:

- Ensure economic growth
- Encourage conservation
- Be stewards of character
- Prepare for crisis or change
- Establish/maintain finances
- Be flexible and adaptive

A majority also agrees that the organization is doing work that aligns with its vision.

- This sentiment is weaker than with the mission.
- And one-fourth of non-members disagree that Love Catalina's work represent its vision. Many comments from those who disagree mention conservation and water use as particular concerns.

The vision reflects the work of the organization



Member Satisfaction

Member Sample Characteristics

A total of 67 respondents identified as members and answered questions about their satisfaction with their membership experience in the past 12 months.

Level of Responsibility	
CEO/Owner/General Manager	46%
Management/Executive	19%
Manager/Supervisor	18%
Administrator/Service Representative	10%
Other	6%

Length of Membership	
5 or fewer years	8%
6 – 10 years	10%
More than 10 years	72%
Don't know	9%

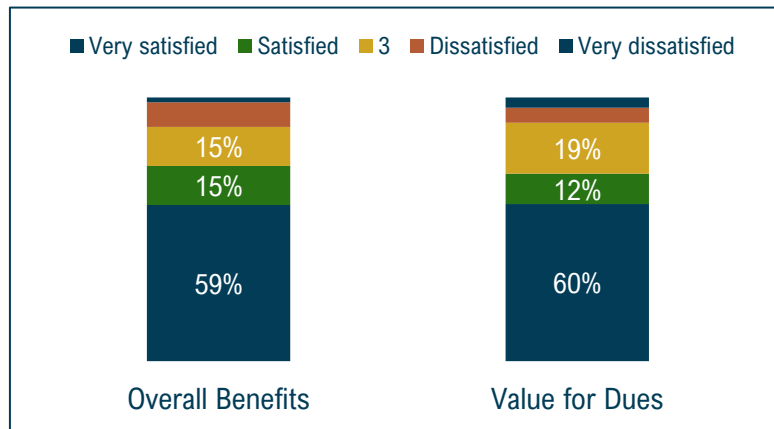
Primary Role	
Administration	30%
Executive	15%
Operations	15%
Customer Service	13%
Other	12%
Marketing	6%
Sales	6%
Housekeeping	1%
Government Employee	1%

Type of Business/organization	
Retail: Independent Store	31%
Activities/Attractions	30%
Nonprofit	25%
Tours & sightseeing	21%
Hotels	19%
Arts/Culture	15%
Transportation	13%
Visitor services	13%
Education	12%
Restaurants/Bars/Catering: Independent	12%
Camping	10%
Professional Services	6%
Sports/Events venues	4%
Trades	4%
Vacation Rental(s) owner	4%
Healthcare/Medical/Wellness	3%
Restaurants/Bars/Catering: Chain	3%
Travel trade	3%
Retail: Chain Store	3%
Media	1%
Government Agency	1%
Meeting/Convention services	1%
Entertainment/Nightlife	1%
Utilities	1%

Member Satisfaction

Members report extraordinarily high satisfaction with Love Catalina.

- Members rated their satisfaction on a 5-point scale. A mean rating over 4.0 is considered excellent.
- Love Catalina achieved this high score on every aspect of its membership experience.



SMARInsights

Visitor Statistics Reporting from Love Catalina	4.53
Quality of Digital/ Advertising/Promotions	4.51
Staff Leadership	4.46
COVID-19 response	4.46
Responsiveness of Love Catalina staff	4.43
Quality of PR/Media Relations	4.43
Visitor Services at the Visitor Center	4.42
Communication from Love Catalina	4.31
Quality of Catalina Island Visitors Guide	4.31
Annual Marketing Conference	4.30
Overall membership	4.22
Overall benefits	4.20
Value for dues	4.17
Board and Committee Meetings	4.16
Board Leadership	4.12
Annual Membership Meeting	4.10
Industry Leadership	4.09
Care for Catalina efforts/stewardship	4.00

Value of Events

Events also receive high marks from members, but they have less value for non-members.

- Members and non-members were asked to rate their satisfaction with Love Catalina’s events using a 5-point scale. They had an option of “I don’t know” and those answers are not included in these mean scores.
- Only Pride, Fireworks and Fixers scored below the target mean of 4.0.

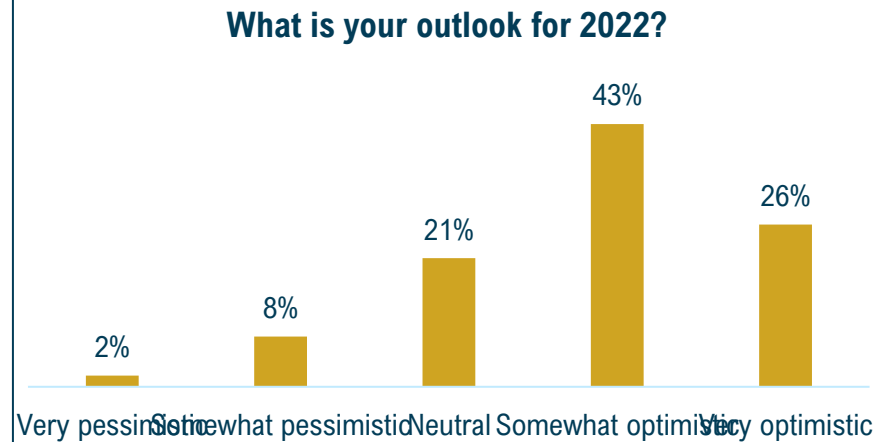
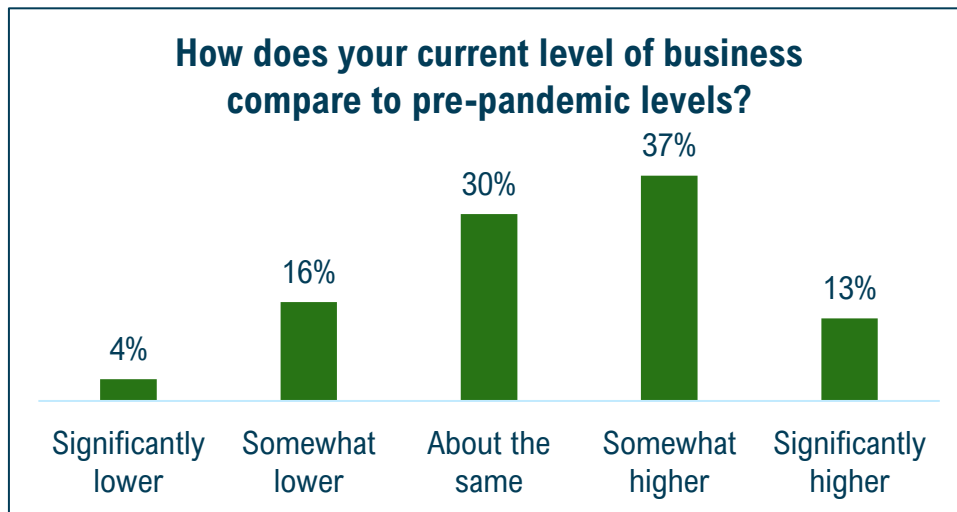
** The survey was conducted prior to the 2022 Pride and Fireworks events.*

	Member	Non-member
Shred Event	4.53	3.62
Annual Triathlon	4.33	4.18
New Year’s Eva Gala	4.29	3.95
Mixers	4.26	3.38
Film Liaison Services	4.23	3.53
Shop Catalina/Holiday Events	4.23	3.96
Cruise Industry Relations	4.20	3.09
Love Catalina’s Business Advocacy efforts	4.19	3.48
Taste of Avalon	4.14	3.94
Lodging Open House	4.09	3.55
Concert Series	4.08	3.85
Restaurant Week	4.02	3.57
Catalina Pride Celebration	3.94	3.18
July 4th Fireworks/event support	3.90	3.37
Fixers/Educational Programs	3.58	3.09

Business Recovery & Staffing

Business levels are the same or better than pre-pandemic levels for 80% of member businesses. Staffing is below pre-pandemic levels, but most are hiring and unable to fill vacant positions.

- Most members are optimistic for 2022. This optimism is primarily among businesses that are experiencing higher levels of activity, but not entirely.
- COVID-19 continues to be a concern as well as housing and workforce.



Factors in Recovery

Members are facing a variety of business challenges.

- They are concerned about a variety of issues, with transportation and the cost of visiting topping the list.
- But when asked which one factor is the most important, the cost of visiting ranked first.
- Despite challenges with hiring noted earlier, this challenge was rated “very important” by only 64% and the “most important” by just 16% of members. This is seen as an operational challenge more than a barrier to recovery.

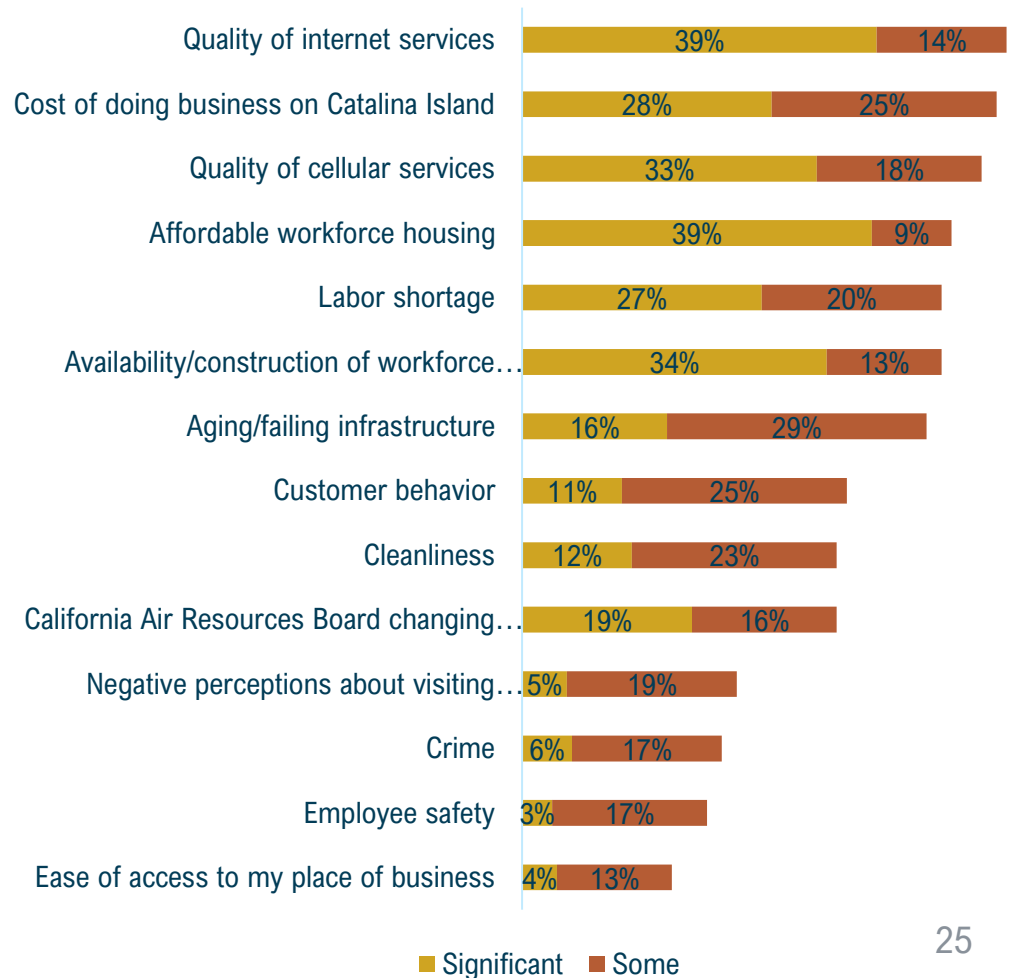
	Very Important	Most Important
Transportation to/from Island	86%	13%
Cost of Visiting	73%	32%
Domestic Travelers	67%	20%
Workforce	64%	16%
Investment in Tourism Promotion	49%	15%
Sports/Entertainment Events	44%	3%
International Travelers	30%	--
Meetings and Conventions	24%	--

Issues

The issues with the most significant impact were cited by only one-third of members.

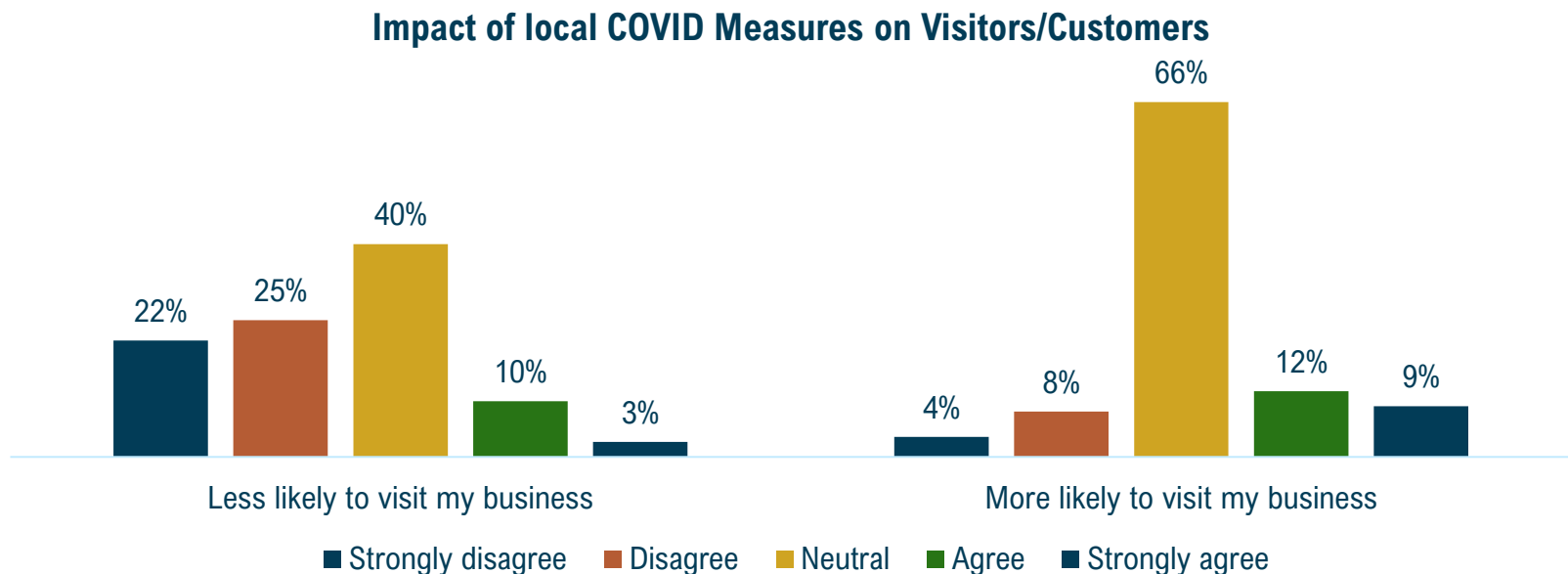
- Quality internet, workforce housing and cellular service topped the list of significant issues.
- Crime and safety are not seen as having a big impact on Catalina Island businesses.

How much are each of these impacting your business?



Impact of COVID-19 Safety Measures

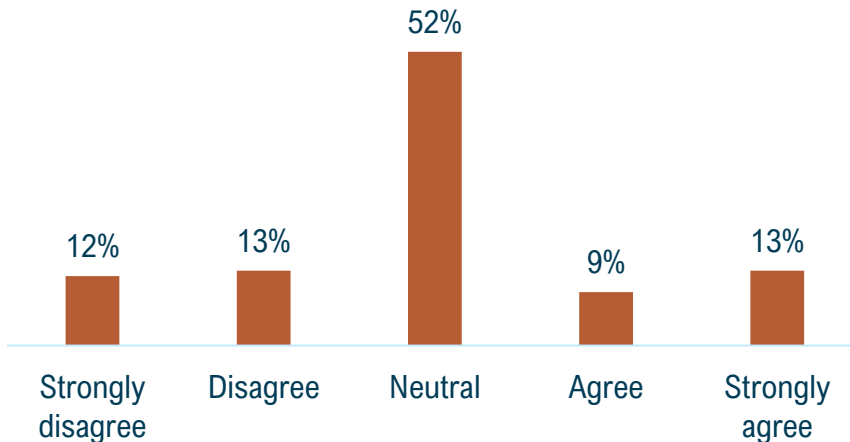
- Local COVID-19 measures were not considered harmful to local business but were also not viewed as having a positive effect on influencing visitors/customers to frequent businesses.



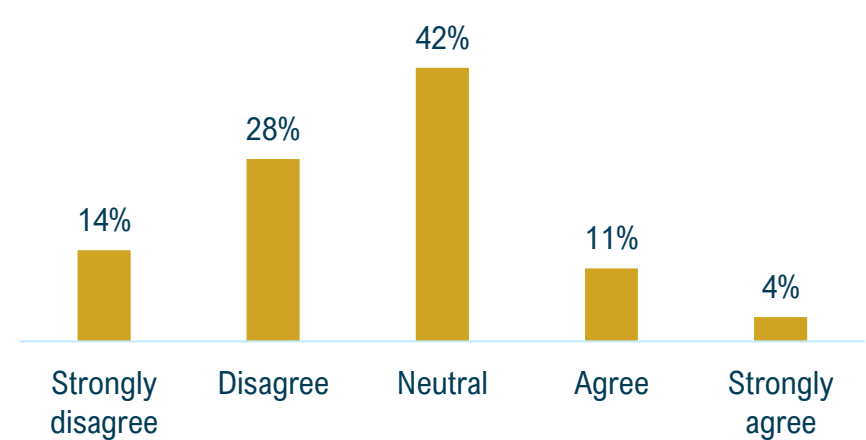
Funding for Promotion

- Only one-in-four members agree that tourism promotion for Catalina Island is underfunded. Although there is recognition for the benefits of tourism, and little opposition to attracting more visitors, concerns about housing prices are putting downward pressure on tourism sentiment.
- Most members do not feel that Catalina's occupancy levels are low compared to competing destinations. They are happy with business levels, and/or are unaware of the numbers.

Catalina's Tourism Promotion is underfunded compared to competing destinations



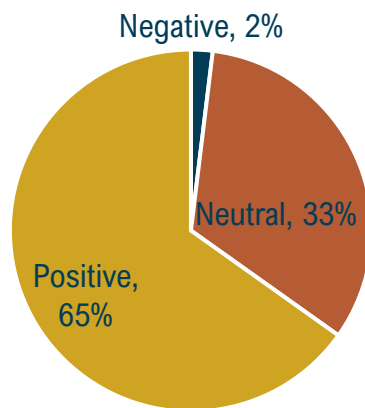
Catalina's hotel/vacation rental occupancy is low compared to competing destinations



Digital Ads

- 82% of survey participants recalled seeing digital advertising by Love Catalina Island.
- Two-thirds had a positive reaction to the ads and very few were negative.

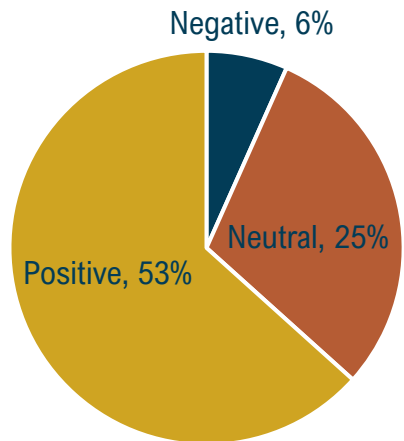
How do you feel about these ads?
(Digital)



Video Ads

- 48% of survey participants recalled seeing digital advertising by Love Catalina Island.
- More than half had a positive reaction to the ads and very few were negative.

How do you feel about this ad?
(Video)



Comments

Sample of Comments: Mission

Strongly Agree	Somewhat Agree	Disagree
They advertise and that brings tourists that spend	It does its best with the resources it has available.	Tourists often don't respect the island. They use way too much water and leave their trash everywhere. Rent is very expensive if you can even find a place to rent.
They are doing a good job of increasing visitor days.	It's hard with some of the old-school locals who just make everything negative. They don't understand business and they don't want to listen to anyone. They don't comprehend so they just shut new things down.	There are too many vacation homes and not enough housing so work places ate often under paid and under staffed
They attract visitors and advocate for commerce on Catalina Island.	Isn't that what a Chamber of Commerce is supposed to do?	I see the ads on tv, hotel room books, banners announcing various activities, articles in the Islander, etc.
They try their best to promote the Island as a good tourist destination	I somewhat agree because I think most things are great from Love Cat BUT I do not like the huge cruise ships .. especially the carnival. So inviting more of those large and environmentally awful seems counterproductive to me	Catalina should be busy all year round. Winter is dead. Weather is used as an excuse, but people in other places use vacation destinations all year round with worse weather. Love Catalina consistently fails at marketing.
They work hard to promote the island	Love Catalina's work is to be helpful to visitors and also keeps locals informed on things going on in town. I believe it is a great resource, however, I don't believe that the city needs to be allocating so many funds in order to run it.	Seems a waste of money, tourists have a negative effect on the island
This island is based on tourism	With social media and influencers, it's possible to get the word out at much lower costs.	Advocate for commerce is outdated term and doesn't appeal to me as a mission statement
Tourism is their top priority	Love Catalina allows itself to be drawn into time consuming topics like housing & cost of living debates	Because not everyone loves Catalina!
We are a 100% tourism-based economy	I'm not exactly sure what love Catalina does. I know they advertise and try to bring tourist to the island. Beyond that I'm not sure what they do. Do they promote events? Probably	Do not see the mgmt staff on island full time
We need tourism to survive and attracting visitors is the purpose of the Chamber of Commerce	I feel we have many people that do not live in Avalon, or have a stake in the community beyond profit, are able to open businesses while the local community isn't able to do so as easily.	They seem to make decisions based off what lines their pockets not decisions based off good to community.
We need tourist income in order to survive	I think they attempt to do this, but I think more novel approaches may be necessary rather than the same thing over and over	Missed opportunities
We need tourists to stay in business. Advertising brings tourists and cruise ships. The visitors come when Catalina is in their mind or when events are here and desirable or affordable.	I haven't seen the numbers (\$)	They only support the Island Company properties and businesses that advertise with them. The City of Avalon should not be giving them money.
You help inform people to choose Catalina and hopefully show our community what needs to be done		Where are they giving back we where promised a community pool . The locals raised money what happened to that idea?
Your outreach promotes tourism and since most businesses are either directly tourism serving or serve the community that serves tourism you are promoting/advocating for commerce.		They cater to the island company businesses and affiliates

Sample of Comments: Vision

Strongly Agree

As a member of its board, I know if detail all of the things they are doing in these facets. And, no other entity in Avalon is situated to do it.

Because the results of their work are verifiable.

By there actions and promotions

Catalina's residents live and work in the same area that tourists visit. It's essential that Islanders are on-board with this mission.

Each aspect of the vision is considered in the decision making process.

Everyone who works for the chamber works hard.

Helps educate about resources

I believe that Love Catalina balances growth while maintaining the quaint feel of its communities

I see them involved in all phases of the city works

I think there's a good amount of work being done towards that vision. I don't know that Love Catalina can truly address all of the items, some seem to be more municipality items, others county and state but I do think they are doing their best.

I'm not exposed to anything that indicates otherwise.

If not Love Catalina then who?

It's obvious if you are paying attention

Jim and his crew are ALWAYS ready to help! On the pier, social media, meetings. Even on the boats or the street, I thank him for all the hard work in promoting C.I.

Love Catalina is responsive to all those ideals.

Love Catalina's efforts improve our economy and enable small businesses to prosper.

Matches my experience

Outcome of work is evident.

Over the years, I have read the Islander and pay attention. I can think of examples for each vision statement, which leads me to believe that Love Catalina works hard to accomplish it's mission and vision.

Those are the exact things I see the organization and community doing. There are always a few disgruntled folks who don't understand how the world works, and who make excessive, out of proportion to their numbers, complaints. It reminds me of an old saying from 2500 years ago: "The dogs will bark but the caravan still passes."

To my knowledge, the mission is guiding all activity of the organization. It serves as a lens for decision making.

Sample of Comments: Vision

Strongly Disagree

Because the work often skews towards only bringing more people in without serious attention to impact and now the real crisis of lack of workers as well as housing that is truly community based rather than short term "worker" housing which is only for younger folks only here to work then move on.

Centered on business and profit

Community isn't supported

Do you encourage conservation, especially water?

Don't hear much on crisis, finances, etc.

I don't think they have been good stewards of Avalon's unique charm nor its resources (beaches)

Love Catalina underperforms at marketing. This effects all other areas

Many of the vision points are not being accomplished. The town is a dirty mess. There is so much trash. The golf carts are the major cause of pollution.

No goal is really met

Not when you hear what seems is one voice that does not speak for all

Stewards for our unique character would help us negotiate to keep open our movie theater, a major attraction.

The Conservancy is the one who conserve resources I've never heard of any love Catalina efforts to do so, I'm prepared for crisis or change I've never heard of any efforts about that either or what that would even look like.

Tourists are a negative impact on island

Tunnel vision

Unsure of finances within entity

Visitors to our island staying at the various hotels are not held accountable for their water usage. In addition, a lot of the rental properties and hotels near me aren't keeping track of how many people are actually staying in each unit which also puts a strain on our infrastructure due to overuse

Because you only support the first bullet - ensure economic growth. How are you being stewards of Catalina's unique character?

I do not think that this is what is reflected

The large amount of tourism uses resources and pollutes the island and infrastructure is outdated and can't handle the amount of tourists.

The only item on the list that the Chamber adheres to is Ensure economic growth. There is no "quaint character" left in our town! It's an adult Disneyland!

Tourists often don't respect the island. They use way too much water and leave their trash everywhere. Particularly the cruise ships bring very little benefit. They often don't actually purchase anything and just leave trash on the beach. Rent is very expensive if you can even find a place to rent. There are too many vacation homes and not enough housing so work places are often under paid and under staffed. We don't even have a movie theater anymore, which was something locals really enjoyed.