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Profile of Catalina Island Visitors Spring & Summer 2016



November 2016

Visitor Research to Support Catalina Island Chamber/Visitor Bureau Goals

- Catalina Island Chamber of Commerce & Visitor Bureau (CICVB) markets Catalina Island to non-local visitors and works to sustain the destination brand.
- Integral to its marketing strategy, CICVB is conducting **visitor research** that will produce:
 - comprehensive **profile of visitor behaviors and demographics** on a seasonal and annual basis
 - annual **visitor volume** and **visitor spending**
 - annual **fiscal (tax) impacts** from visitor spending
 - visitor-supported local **employment**
- This is a summary of **2016 Spring, Summer and To-Date** visitors.
- Lauren Schlau Consulting (LSC), a tourism industry specialist, is conducting the research study.



Methods for the Multi-Phase Study

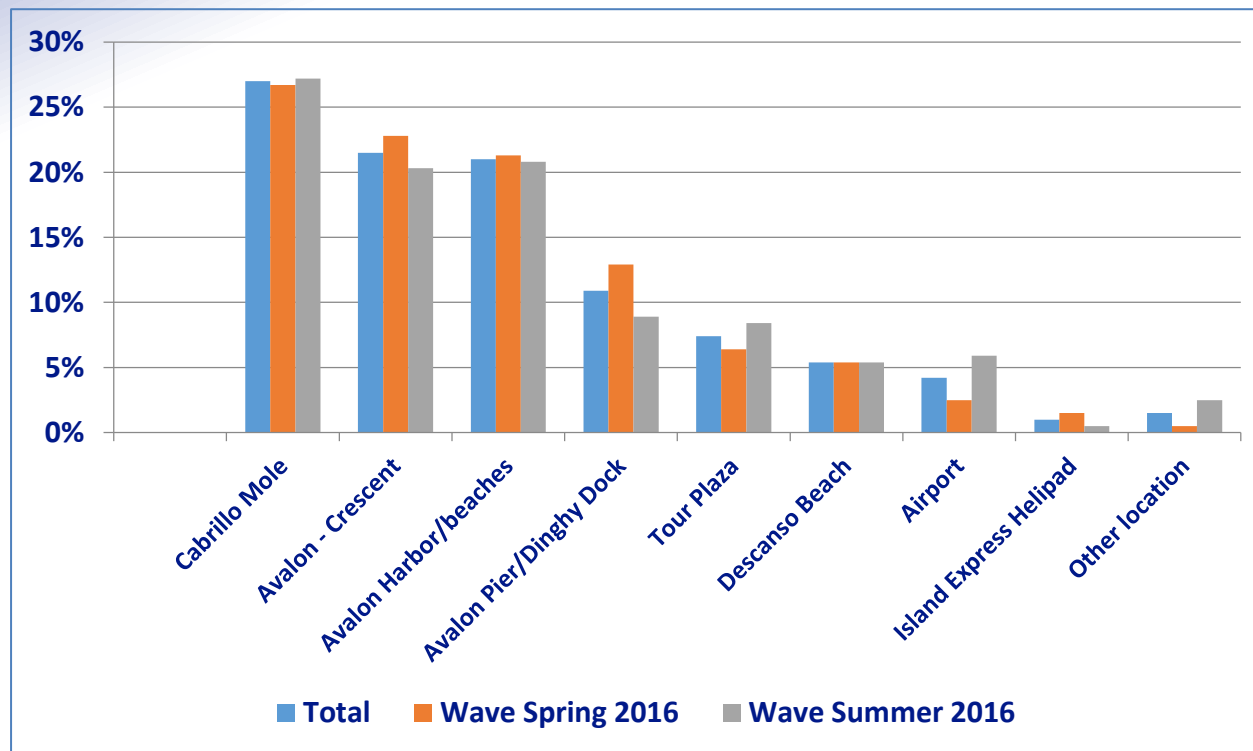
Overall study methodology:

- Face-to-face **intercept interviews** with visitors out and about on Catalina Island
 - Total of 600 on annual basis
 - 200 interviews per 3 seasonal “waves”
- A “**Visitor**” is defined as: Anyone residing outside Catalina Island who here for any temporary purpose(s) other than for regular work or to attend school.
- **Lodging supply, demand, and rate data** by season and lodging segment, collected at the end of the study year.



Varied Interview Locations to Capture Representative Sample

- The 404 on-site intercepts to date conducted at popular visitor sites, with at least 20% per wave at Cabrillo Mole, Avalon Crescent and Avalon Harbor/Beaches



TYPICAL VISITOR - BEHAVIORS

Residence

- 71% Southern Californians
- Surprisingly given proximity, 70% have not visited Catalina Island in past three years
- Non-So. Cal. residents flew commercial air or drove to Southern California; 90% came Catalina Island by ferry



Purpose & Activities

- Visiting mainly for vacation/leisure, secondarily for a celebration.
- While here, visitors mainly:
 - eat in restaurants, shop, sightsee, go to the beach, do water activities, rent golf carts, socialize
 - visit Avalon retail district, Avalon Harbor area, the Pier



TYPICAL VISITOR - BEHAVIORS

Lodging

- Nearly half, 47% stay overnight, thus 53% are day only visitors;
- All visitors average .9 nights; overnights average 2.0 nights here, longer in summer
- 80% of overnights stay in hotel/inn lodging; 6% used a vacation rental like Airbnb
- Hotel guests reserved nearly 3 weeks in advance, using a travel website or the lodging's website.

Spending

- 99% of visitors spent money on Catalina Island, averaging \$289 per group per day
- Most spent on: lodging \$79, meals/snacks \$69, shopping/gifts \$40, and activity fees \$38 group/day



TYPICAL VISITOR GROUP - DEMOGRAPHICS

- Mainly families and couples in Summer, half are couples in spring
- Groups average 2.75 persons; 19% traveling with someone under age 18
- 53% married; 24% of all visitors with children under age 18 at home, 9% with children over age 18 at home (may be respondent)
- Diverse: 55% Caucasian, 25% Latino/Hispanic, 10% Asian American, 8% African-American
- Median household income of \$77,500; higher in Spring, \$80,300 versus \$74,500 in Summer
- 60% of respondents are female
- Visitors mainly think of Catalina Island as relaxing, fun, great, beautiful, awesome

VISITOR ORIGIN MAINLY SO CAL, FEW INTERNATIONAL

Visitor Residence

	Total	Wave	
		Spring	Summer
Base:	404	202	202
So Cal	70.6%	66.8%	74.4%
Central Cal	6.7%	6.9%	6.4%
Nor Cal	3.9%	3.9%	4.0%
Cal Total	81.1%	77.6%	84.8%
Other US	16.6%	19.8%	13.4%
Int'l.	2.2%	2.5%	2.0%

70% FIRST-TIME (3 YRS.) REPEAT VISITORS TOOK 3 TRIPS (3 YRS.)

First or Repeat Visitation to Catalina Island

Visitation to CI - Past 3 years to	Total	Wave	
		Spring	Summer
Base:	404	202	202
First visit	69.8%	72.8%	66.8%
Visited before	30.2%	27.2%	33.2%
Base: Visited in the past 3 yrs.	122	55	67
1 time	35.2%	34.5%	35.8%
2-3 times	38.5%	36.4%	40.3%
4-6 times	9.8%	12.7%	7.5%
7-10 times	7.4%	9.1%	6.0%
11+ times	9.0%	7.3%	10.4%
Mean visits (all visitors)	0.97	0.90	1.08
Mean visits (repeat visitors)	3.22	3.29	3.27

INTERNET MOST USED IN PLANNING; CI MAP & PAST EXPERIENCE ONCE HERE

Planning Sources for Catalina Island Information

(>2%)

	Total	Wave	
		Spring	Summer
Base:	404	202	202
ANY INTERNET SOURCE	58.9%	54.5%	63.4%
General travel website/search like Travelocity, etc.	41.8%	41.1%	42.6%
Family member/friend	21.8%	22.8%	20.8%
Own experience/been here before	14.1%	15.8%	12.4%
Catalina Express/Flyer website	13.9%	10.4%	17.3%
Catalina Island Visitor Bureau web, mobile or app	6.7%	5.4%	7.9%
Interactive website like Yelp or Trip Advisor	3.7%	4.0%	3.5%

On Island Sources for Catalina Island Information

(>2%)

	Total	Wave	
		Spring	Summer
Base:	404	202	202
Catalina Island Map	20.5%	12.9%	28.2%
Own experience/been here before	20.0%	16.3%	23.8%
ANY INTERNET SOURCE	18.1%	18.3%	17.8%
Hotel/ concierge/hotel rack brochures	16.1%	18.3%	13.9%
General Travel search, website, or app	11.4%	6.9%	15.8%
Catalina Island visitor center	8.7%	9.4%	7.9%
Local friends/family	7.4%	9.4%	5.4%
Family member/friend	7.2%	10.4%	4.0%
Catalina Express Magazine	5.7%	6.4%	5.0%
Catalina Island Visitor Guide	3.0%	4.5%	1.5%

ARRIVED IN SO. CAL BY AIR OR DRIVING; CROSSED TO CATALINA ISLAND BY FERRY

Arrival in Southern California

	Total	Wave	
		Spring	Summer
Base: SC visitor	116	68	48
Commercial airline	44.8%	48.5%	39.6%
Personal vehicle	41.4%	38.2%	45.8%
Rental vehicle	4.3%	4.4%	4.2%
Cruise ship	3.4%	4.4%	2.1%
Public bus/Greyhound	1.7%	2.9%	0.0%
Tour coach	1.7%	0.0%	4.2%
RV/motorhome	0.9%	1.5%	0.0%
Private/charter airplane	0.9%	0.0%	2.1%
Other	0.9%	0.0%	2.1%

Arrival on Catalina Island

	Total	Wave	
		Spring	Summer
Base:	404	202	202
Catalina Express or Catalina Flyer ferry	91.6%	91.6%	91.6%
Cruise ship (tender)	4.2%	5.9%	2.5%
Private plane/seaplane	1.7%	0.5%	3.0%
Private/charter yacht or boat	1.2%	1.0%	1.5%
Helicopter	1.2%	1.0%	1.5%

MAIN PURPOSE TO CI FOR VACATION/ LEISURE; SECONDARY TO CELEBRATE

Main Purpose for Visiting Catalina Island

	Total	Wave	
		Spring	Summer
Base:	404	202	202
Vacation/pleasure/to visit	59.9%	52.5%	67.3%
Celebration: wedding anniversary/birthday	24.8%	27.7%	21.8%
Sightseeing/explore the area	7.9%	9.9%	5.9%
Outdoor or water recreation	2.2%	3.0%	1.5%
Conduct business	1.7%	2.5%	1.0%
Special event	1.5%	2.0%	1.0%
Visit relatives/friends/personal or social visit	1.0%	2.0%	0.0%
Combining business or meeting and pleasure	0.2%	0.0%	0.5%
Other	0.7%	0.5%	1.0%

MAIN ACTIVITIES: EATING OUT, SHOPPING

MAIN AREAS: AVALON AND PIER

Activities on Catalina Island

	Total	Wave	
		Spring	Summer
Base:	404	202	202
Eat in restaurants	79.0%	79.2%	78.7%
Shopping	50.2%	54.0%	46.5%
Sightsee/explore the area	39.6%	38.6%	40.6%
Go to the beach	36.4%	25.7%	47.0%
Water activities:swim/snorkel/kayak etc.	28.7%	19.3%	38.1%
Golf Cart rental or tour	24.5%	25.2%	23.8%
Just visit/socialize	23.0%	21.8%	24.3%
Hiking	13.4%	11.4%	15.3%
Visit art museum/gallery	11.6%	12.4%	10.9%
See historic or architectural sites	9.7%	6.9%	12.4%
Walking tour	9.2%	4.5%	13.9%
Zip-lining	9.2%	6.9%	11.4%
Parasailing	8.7%	8.4%	8.9%
Biking/bike tour	7.2%	9.4%	5.0%
Hummer/Jeep tour	5.7%	5.0%	6.4%
Camping	3.0%	3.0%	3.0%
Golfing	1.5%	1.0%	2.0%
Fishing	1.2%	1.0%	1.5%
Segway tours	1.0%	0.0%	2.0%
Attend a special event/concert	0.7%	1.0%	0.5%
Helicoptering/touring	0.2%	0.0%	0.5%
Other area activities/amusements	26.2%	28.2%	24.3%
None of the above	0.5%	0.5%	0.5%

Catalina Island Areas Visiting

	Total	Wave	
		Spring	Summer
Base:	404	202	202
Avalon - retail district	73.3%	69.8%	76.7%
Avalon - harbor area	70.0%	68.8%	71.3%
Catalina Pier/Visitor Center	61.4%	65.8%	56.9%
Descanso Beach	39.9%	35.6%	44.1%
Catalina Island Museum	21.5%	25.7%	17.3%
Wrigley Gardens	17.8%	19.3%	16.3%
Island Interior/Conservancy areas	15.1%	15.3%	14.9%
Two Harbors	3.0%	3.0%	3.0%
Wrigley Institute	2.7%	2.0%	3.5%
Catalina Sea Camp/other camps	2.7%	1.5%	4.0%
Parsons Landing area/State Park	1.7%	1.0%	2.5%
Long Point area	1.0%	0.5%	1.5%
Other	11.9%	6.9%	16.8%
None of the above	1.0%	1.5%	0.5%

ALMOST HALF OVERNIGHT HERE; OVERNIGHTERS SPENT 2 NIGHTS

Overnight or Day; Length of Stay – Nights

Percent staying overnight	Total	Wave	
		Spring	Summer
Base: all visitors	404	202	202
Total spending nights	61.6%	70.8%	52.5%
% Spending Nights on Catalina Island	47.0%	49.5%	44.6%
% Spending Nights in Los Angeles area (other than CI)	14.1%	19.3%	8.9%
% Spending Nights in all other locations/destinations	13.9%	18.8%	8.9%
All Visitors			
Nights on Trip	2.03	2.48	1.58
Nights on Catalina Island	0.94	0.96	0.88
Nights in Los Angeles area (other than CI)	0.61	0.85	0.42
Nights in all other locations/destinations	0.63	0.87	0.50
Minimum Base: Overnight visitors	56	38	18
Number of Nights			
Total	3.30	3.50	3.02
Nights on Catalina Island	2.01	1.93	1.98
Nights in Los Angeles area (other than CI)	4.33	4.38	4.67
Nights in all other locations/destinations	4.52	4.63	5.56

38% OF ALL VISITORS, 80% OF OVERNIGHTERS STAYED IN HOTEL/INN

Overall Lodging or Day

	Total	Wave	
		Spring	Summer
Base:	404	202	202
Day Visitor	53.0%	50.5%	55.4%
Hotel/Motel	37.6%	40.1%	35.1%
Private/Other	9.4%	9.4%	9.4%

Specific Lodging - Overnighters

	Total	Wave	
		Spring	Summer
Base: Overnight on SCI	190	100	90
Hotel or motel	79.5%	81.0%	77.8%
Camping	7.4%	6.0%	8.9%
Paid vacation rental like AirBnB, VRBO	5.8%	8.0%	3.3%
Private unpaid home/condo/apartment of friends, family	3.7%	3.0%	4.4%
On-board private boat	2.6%	1.0%	4.4%
Bed & Breakfast Inn	0.5%	0.0%	1.1%
Other	0.5%	1.0%	0.0%

LODGING RESERVED ONLINE AVG. 3 WEEKS IN ADVANCE

Means of Reserving Lodging

	Total	Wave	
		Spring	Summer
Base: Overnight in SCI hotel	177	95	82
On a travel website like hotels.com, Travelocity etc.	43.5%	55.8%	29.3%
On the lodging's website	23.7%	13.7%	35.4%
By call to the lodging or lodging's "800" reservation number	15.8%	12.6%	19.5%
My company booked it	1.7%	1.1%	2.4%
Through a travel agent	1.7%	3.2%	0.0%
Through tour arranger or operator	1.7%	1.1%	2.4%
Through other vacation rental agency	1.1%	1.1%	1.2%
Through vacation shared housing agency like airbnb	0.6%	1.1%	0.0%
Other	10.2%	10.5%	9.8%

Advance Reservation Period (weeks)

	Total	Wave	
		Spring	Summer
Base: Overnight in SCI hotel	177	95	82
0 (Did not plan ahead/decided or reserved here)	16.9%	14.7%	19.5%
1 week	14.1%	12.6%	15.9%
2 weeks	15.3%	12.6%	18.3%
3-4 weeks	29.4%	31.6%	26.8%
5-8 weeks	14.7%	14.7%	14.6%
9-12 weeks	5.6%	7.4%	3.7%
More than 12 weeks	4.0%	6.3%	1.2%
Median (weeks):	2.75	3.13	2.30

VISITORS MAINLY SPENT ON MEALS, DRINKS, SHOPPING, LODGING, ACTIVITIES

Spending Incidence

Percent of groups spending in category	Total	Wave	
		Spring	Summer
Base:	404	202	202
Total	98.5%	98.5%	98.5%
Meals out/snacks	93.1%	93.1%	93.1%
Drinks/beverages	72.3%	75.2%	69.3%
Shopping/gifts/souvenirs/specialty items	58.9%	61.9%	55.9%
Lodging	42.8%	45.5%	40.1%
Fees for activities, tours, passes equipment, etc.	39.6%	34.7%	44.6%
Transportation (fares, cart rental, etc.)	28.0%	25.7%	30.2%
Groceries/personal items/other	16.1%	10.9%	21.3%
Museum/theater admission/ nightclub covers	13.9%	15.8%	11.9%
Amenities like spa, grooming or health club	3.0%	2.5%	3.5%
Fine arts/home decor	1.7%	2.0%	1.5%

Spending by Category

Mean spending per group (whether spent in that category or not)	Total	Wave	
		Spring	Summer
Base:	404	202	202
Total (\$)	289.49	281.37	297.97
Lodging	78.88	77.03	79.88
Meals out/snacks	69.41	66.37	75.86
Shopping/gifts/souvenirs/specialty items	39.83	46.50	35.78
Fees for activities, tours, passes equipment, etc.	38.50	33.17	44.27
Drinks/beverages	21.09	22.77	20.74
Transportation (fares, cart rental, etc.)	18.05	15.68	21.62
Groceries/personal items/other	3.93	2.64	5.25
Amenities like spa, grooming or health club	3.59	3.12	4.01
Museum/theater admission/ nightclub covers	2.96	2.98	2.96
Fine arts/home decor	0.77	1.24	0.30

TRAVEL GROUPS COUPLES OR FAMILIES MOST VISITORS NOT ON A TOUR

Travel Group Composition

	Total	Wave	
		Spring	Summer
Base:	404	202	202
A couple	43.1%	52.5%	33.7%
A family group - parents and children	27.5%	20.3%	34.7%
A group of friends or co-workers	11.6%	12.4%	10.9%
Alone	8.7%	6.9%	10.4%
Extended family - multi generation	3.7%	2.0%	5.4%
A mixed group of family and friends	2.7%	3.0%	2.5%
Other	2.7%	3.0%	2.5%

On A Tour

	Total	Wave	
		Spring	Summer
Base:	404	202	202
No	94.3%	92.1%	96.5%
Yes	5.7%	7.9%	3.5%

GROUPS AVG. 2.75 PERSONS 19% TRAVELING WITH PERSON UNDER 18

Travel Group Size

Mean number per valid respondent (Excl. None)	Total	Wave	
		Spring	Summer
Minimum Base:	76	22	54
Total group	2.75	2.61	2.88
Under the age of 18	1.80	1.77	1.81
18 or over	2.33	2.40	2.34
% of people are ...			
Under the age of 18	11.0%	6.9%	14.4%
Total group	89.0%	93.1%	85.6%
% Groups Traveling with...			
Adult only travel group	81.2%	89.1%	73.3%
Traveling with children under 18	18.8%	10.9%	26.7%

**OVER HALF ARE MARRIED;
23% HAVE KIDS UNDER 18
55% CAUCASIAN, 45% NON-CAUCASIAN**

Household Composition

	Total	Wave	
		Spring	Summer
Base:	404	202	202
Married/partnered without children under age 18 at home	35.6%	45.0%	26.2%
Single adult without children under age 18 at home	25.2%	21.3%	29.2%
Married/partnered with children under age 18 at home	17.8%	16.3%	19.3%
Household with adult children over age 18 at home	9.2%	6.4%	11.9%
Single adult with children under age 18 at home	3.5%	3.0%	4.0%
Group of unrelated adults	2.0%	2.5%	1.5%
Own or extended family with children under age 18 at home	1.5%	1.5%	1.5%
Other	5.2%	4.0%	6.4%

Ethnicity

	Total	Wave	
		Spring	Summer
Base: US resident	395	197	198
Caucasian (non-Hispanic)	55.2%	61.4%	49.0%
Hispanic/Latino	25.1%	21.8%	28.3%
Asian-American	9.6%	8.1%	11.1%
African-American	7.8%	10.2%	5.6%
Pacific Islander	2.0%	0.5%	3.5%
Native American	0.8%	1.0%	0.5%
Other group	3.5%	3.0%	4.0%
Prefer not to disclose	0.5%	0.5%	0.5%

\$77,500 MEDIAN HOUSEHOLD INCOME 60% RESPONDENTS ARE FEMALE

Household Income

	Total	Wave	
		Spring	Summer
Base: Valid respondent	342	166	176
Under \$30,000	14.3%	17.5%	11.4%
\$30,000 - \$49,999	12.6%	12.0%	13.1%
\$50,000 - \$74,999	21.1%	15.7%	26.1%
\$75,000 - \$99,999	20.2%	22.9%	17.6%
\$100,000 - \$199,999	19.3%	18.1%	20.5%
\$200,000 - \$500,000	10.5%	10.8%	10.2%
Over \$500,000	2.0%	3.0%	1.1%
Median income (\$)	77,500	80,300	74,500

Respondent Gender

	Total	Wave	
		Spring	Summer
Base:	404	202	202
Female	60.1%	59.9%	60.4%
Male	39.9%	40.1%	39.6%

VISITORS SAY CATALINA ISLAND IS RELAXING, FUN, GREAT, BEAUTIFUL

Words Describing Catalina Island (>1%)

	Total	Wave	
		Spring	Summer
Base:	404	202	202
Relaxing	19.1%	21.3%	16.8%
Fun	13.6%	12.4%	14.9%
Good/Great	9.2%	4.5%	13.9%
Beautiful	7.9%	10.4%	5.4%
Awesome	5.4%	5.0%	5.9%
Amazing	4.2%	4.0%	4.5%
Nice	3.5%	4.0%	3.0%
Fantastic	3.2%	1.5%	5.0%
Excellent	3.0%	1.0%	5.0%
Wonderful	2.7%	3.5%	2.0%
Enjoyable	2.2%	1.5%	3.0%
Peaceful	2.2%	3.5%	1.0%
Pleasant	1.7%	1.5%	2.0%
Lovely	1.2%	1.5%	1.0%
Pretty	1.0%	2.0%	0.0%

THANK YOU!

Questions?

