South Padre Island, Texas Comprehensive Travel Market Research Study

Prepared for:

- South Padre Island Convention and Visitors Bureau

Study Conducted: November, 2017 – May, 2018
Final Report Submitted – May, 2018

Young Strategies, Inc.
Charlotte, NC

South Padre Island Travel Market Research

RESEARCH OBJECTIVE:

Young Strategies provided a research-based travel market study for the South Padre Island CVB that:

- Identified the current segmented markets, visitor geo/socio-demographic profile and spending levels
- Identified the attractors/motivators that drive visitation to South Padre Island
- Identified target/growth markets, visitor segments and strategies with the optimal ROI
- Developed an overall comprehensive strategic action plan
- Developed a solid, reliable annual economic impact model

- Visitors – 416 + 519 + 232 + 290 + 170 + 2,053(Travel Intention) = 3,680 surveys
- Resident Survey – 50 surveys
- Community Leader Survey – 38 surveys
- Lodging Surveys – 11 of 29 hotels responded plus STR data
- Vacation Rental Management (VRM) – 7 of 8 Local VRM surveys, VRMintel data (June) & AirDNA data of the AirBNB market

PROJECT APPROACH & SCHEDULE

PART ONE: Market Research

CLIENT MEETING, DESTINATION AND ORGANIZATION REVIEW

Developing a familiarity with the destination and its leaders helps the YSI team make smarter recommendations from the research gathered in this methodology.

- Five-day site visit and meetings
- Review of project objectives, current marketing **programs and project materials for the research study.**
- Presentation to community leaders.

LODGING MARKET ANALYSIS -SURVEY, STR ANALYSIS AND HOTELIER and RENTAL MANAGER INTERVIEWS:

- YSI will survey & interview lodging and rental property managers in South Padre Island to determine market segmentation, booking source, primary feeder markets, walk-in occupancy, and taxable room percentages.
- STR (Smith Travel Research) 6-year trend and Daily data reports detailed analysis of the SPI stats and trends by lodging type including ADR, RevPAR, Supply & Demand.
- Meetings with local tax office to identify potential reporting of lodging tax metrics by unit size and geographic location within the destination.
- Comprehensive lodging market analysis for transient, meetings, group & sports markets.

Developing a close familiarity with the destination and a partnership with its leaders helps the YSI team make smarter recommendations from the research gathered in this methodology.

VISITOR PROFILE RESEARCH BY MARKET SEGMENT (ONLINE SURVEYS):

- YSI will develop a custom survey methodology that addresses the unique aspects of the SPI travel market. The survey must be custom designed to provide the best results for the SPICVB.
- NOTE: Partnership from the SPI CVB staff, hoteliers, attractions and other travel related businesses in sending survey links to 2014-2016 SPI visitors and inquirers is essential to the success of this research. Survey will be deployed on social media platforms and in emails directly to South Padre Island visitors and inquirers. Travel partners that deploy the visitor survey to their database will be rewarded with a report of the research data collected from their visitors.
- Final Report Data to Include (Segmented by Market):
    - o Profile of overall size (universe) of each identified segment
    - o Profile of current and most likely potential groups by segment
    - o First time vs. repeat patterns
    - o Rank order of desired new products

PROJECT APPROACH & SCHEDULE

TARGET MARKET AWARENESS & DESTINATION IMAGE RESEARCH

A survey of potential first-time visitors and prior visitors awareness and image of SPI will be conducted online in primary target feeder markets This unique research will determine the image and awareness of South Padre Island as a visitor destination. The survey will be limited to 15 questions and will cover: intent to travel, destination preferences, awareness of South Padre Island, and can test possible future marketing themes and/or messages. Response target is 400 - 600.

PART TWO: Strategic Planning

COMMUNITY LEADER SURVEY - SWOT ANALYSIS/GAP ANALYSIS

an online survey of local travel industry and community leaders to identify destination strengths, weaknesses, opportunities and threats. Strategies will be recommended to overcome any market challenges and a product develop plan will be prepared to address issues within the destination.

STRATEGIC PLANNING WORKSHOP

YSI will conduct a planning workshop with any selected community/travel industry leaders desired to be in attendance .

- Presentation of all project research
- Analysis of the SPI market as a travel destination by segment
- Proposed research identified recommendations for South Padre sales and marketing programs.
- Review of Community leader survey SWOT analysis.
- Staff, board and leader input and discussions of strategies.

STRATEGIC RECOMMENDATIONS

Strategic recommendations will be developed based on research findings.

- Direct sales efforts and/or marketing and promotions needed to target each segment.
- New product development/infrastructure anticipated and/or needed to remain competitive.
- Recommendations and conclusions for improving SPI's competitive position, marketing messages, demand generators, product/destination development and ROI.
- Recommended on-going research and tracking.

Research Study Deliverables

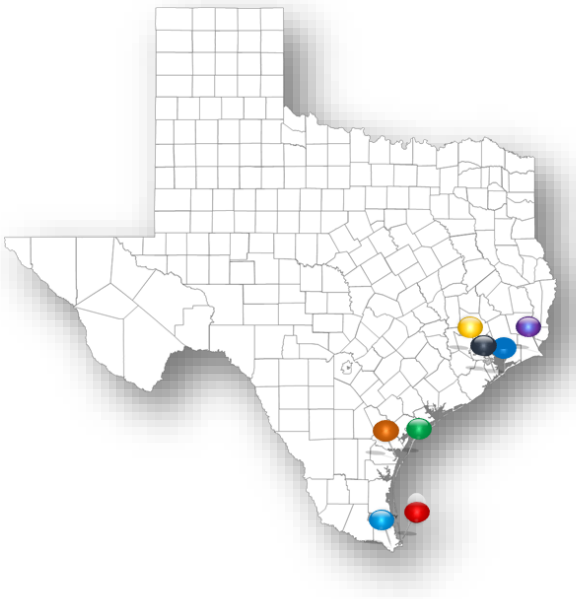
- PowerPoint presentation of research findings and recommendations to South Padre Island travel industry leaders in planning workshop format.
- Digital format final report including all research segments and recommendations.
    - Research data and analysis
    - Strategic recommendations

2012 vs. 2016 Travel Related Tax Relief for South Padre Island, TX

	2012	2016	% of Growth
Total Visitor Spending	$328,000,000	$340,000,000	+3.7%
State and Local Taxes Attributed to Tourism	$22,700,000	$24,000,000	+5.7%
Direct Travel & Tourism Employment (jobs)	3,870	4,350	+12.4%
South Padre Island - # of Housing Units	7,053*	7,518*	+ 6.6%
TAX RELIEF PER SPI HOUSING UNIT	**$3,218**	**$3,192**	**- 0.8%**

*US Census Bureau; 2012-2016 household estimates & U.S. Census Bureau American Fact Finder

State/Local Taxes/Fees Attributed to Tourism	2016 Visitor Spending (in millions)	Rank Order	2016 State/Local Taxes Attributed to Tourism (in millions)	# of Housing Units	Tax Relief per Household
South Padre Island	$340.0	22nd	$24.0	7,518	$3,192
Corpus Christi	$917.0	9th	$60.5	129,357	$468
Galveston	$619.0	14th	$45.1	31,949	$1,411
Brownsville	$254.0	32nd	$12.1	56,179	$215
Port Aransas	$221.0	37th	$17.7	4,327	$4,091
Baytown	$179.0	40th	$14.4	29,419	$489
Port Arthur	$141.0	50th	$10.8	24,420	$442
Seabrook	$39.0	115th	$3.1	5,525	$561



In 2016, more than $6.4 billion in state and local tax revenues were generated by travel and tourism activities. Without those taxes, each household in Texas would have had to pay $689 in additional taxes to maintain current service levels. State of Texas – Tax Relief = $595

South Padre Island CVB
Lodging Market Analysis

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fresh. travel. research.

South Padre Island, TX Lodging Study Methodology

Young Strategies, Inc. (YSI) conducted a survey of the hotel/motel properties and vacation rental management companies (VRMs) located in South Padre Island, Texas as part of a lodging market analysis commissioned by the South Padre Island Convention & Visitors Bureau (SPICVB). Lodging on South Padre Island includes hotel motel and vacation rental homes and condominiums. A short 8-question survey was sent to the South Padre Island Convention & Visitors Bureau database of hotel/motel lodging properties in South Padre Island to estimate the following key metrics projected for the full calendar year 2017: percentage of occupancy driven by 5 market segments and annual occupancy. Hoteliers were also asked to provide recommendations for target markets to drive increased leisure visitation, to rank geographic markets to indicate their priority order for SPICVB's future sales and marketing efforts, and to report the percentage of room nights sold originating from Texas, Mexico, Canada, and other U.S. states. The survey contained three open-ended questions allowing hoteliers to share any noted changes/shifts in room demand over the last year, share their biggest challenge in marketing their property as well as future sales/marketing suggestions for South Padre Island Convention & Visitors Bureau. A similar survey was deployed to eight of the largest SPI vacation rental management (VRM) companies asking for the similar market information with some slight adjustments made for relevancy to a vacation rental property versus a hotel/motel property. Lodging surveys were collected from December, 2017 through April, 2018.

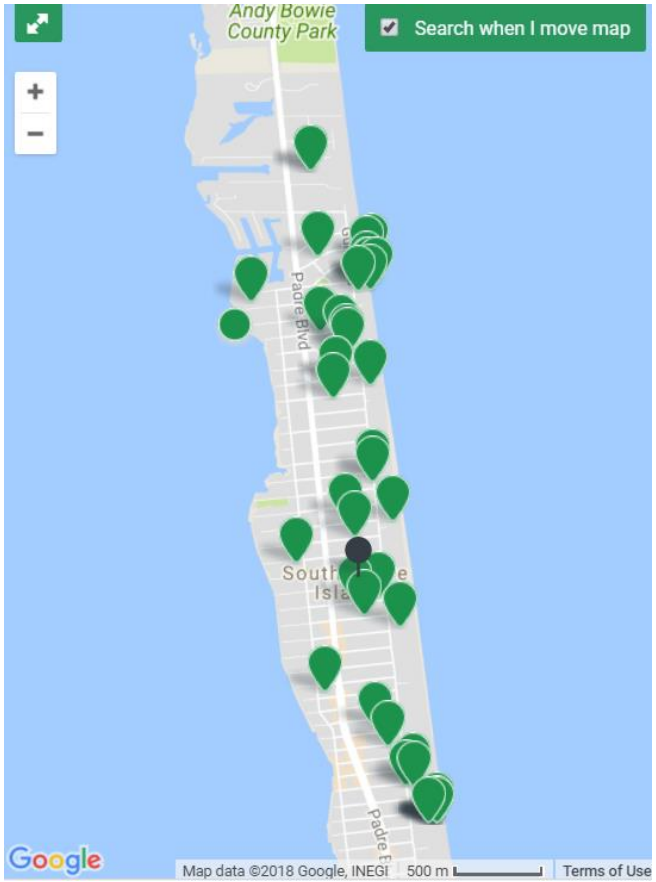
HOTEL/MOTEL INVENTORY: At the time of the YSI lodging study **South Padre Island had twenty-nine hotel/motel properties with approximately 2,373 rooms** actively collecting lodging tax and eleven of these properties with a total of 1,320 rooms (56% of room inventory) currently participate with STR. **A total of eleven properties representing 1,349 rooms participated in the YSI survey, thus providing an overall response rate of 56.8%.** This response rate is considered to be a predictive sample of the overall market based on the size and geographic distribution of the South Padre Island lodging inventory.

VACATION RENTAL INVENTORY: The **City of South Padre Island website (www.myspi.org) lists 2,343 permitted vacation property rentals**. **VRM Intel is currently preparing report with data from the eight largest VRM agencies in South Padre Island with data expected to be added to this report in June, 2018. YSI purchased market data from AirDNA for the Airbnb inventory of1.132 property rentals for the SPI market.**

Note: The charts and tables on the following pages outline the overall findings from the lodging properties that responded to the YSI survey. YSI estimates a margin of error (+/- 3-5%).

South Padre Island, TX Vacation Rentals by Owners

The **City of South Padre Island website (www.myspi.org) lists 2,343 permitted vacation property rentals**. Some of these permitted properties are inactive. A search on **VRBO (Vacation Rental By Owner) for properties available in South Padre Island, TX, pulls up 1,698 properties available for rental**. A search on **Airbnb (using AirDNA) brings up 1,132 properties** in a variety of price ranges. A survey of seven of the largest Vacation Rental Management (VRM) companies revealed a total of 571 rental properties under the seven companies management. It is understood that many vacation property owners "double-dip" by listing their property with a VRM as well as one or more online booking agencies. All vacation rental properties are required to be registered with the city (there is no policing process to identify unregistered rentals) which would indicate a total rental inventory in the range of 2,250 – 2,500.



Source: VRBO.com

Source: airdna.co

South Padre Island, TX Hotel/Motel Lodging Inventory

The twenty-nine hotel/motel properties located in South Padre Island, TX are listed in chronological order by open date in the table below.

2017 South Padre Island Hotel/Motel Inventory - Age / Room Count	Open Date	Rooms
1989 – Prior = 13 Properties	**35.3%**	**837**
South Beach Inn	N/A	12
South Padre Inn / Motel	N/A	19
The Lighthouse Inn	N/A	54
The Palms Resort	N/A	28
Upper Deck Hotel	N/A	19
Wanna Wanna Inn	N/A	15
Isla Grand Beach Resort	Jun-59	193
Surf Motel	Jun-65	30
Padre South Hotel	Jun-73	94
Motel 6	Jan-83	52
South Padre Island Lodge	Jun-85	57
Windwater Hotel	Jun-85	64
Pearl South Padre	Aug-86	200
1990 - 1999 = 3 Properties	**8.8%**	**208**
South Padre Island Inn	Jan-96	49
Super 8 Motel	Feb-99	68
The Inn at South Padre	Oct-99	91
2000 – 2009 = 11 Properties	**40.3%**	**956**
Island Inn	Mar-00	62
Ramada	Jan-01	147
Comfort Suites South Padre	Feb-01	74
Flamingo Inn	Feb-01	30
Best Western Beachside Inn	Jul-01	65
Blue Bay Inn & Suites	Jun-02	49
LaQuinta Inn & Suites Beach Resort	Oct-03	147
Casa Bella Hotel	Oct-04	45
Holiday Inn Express Hotel & Suites	Mar-05	104
La Copa Inn Beach Resort	Jun-05	146
Suites at Sunchase	Jun-08	87
2010 - Present = 2 Properties	**15.7%**	**372**
Hilton Garden Inn Beach Resort	Jul-10	156
Schlitterbahn Beach Resort	Aug-12	216
29 TOTAL Properties	**Rooms =**	**2,373**

Source: SPI STR 6-YR trend report, SPICVB Lodging database

Note: STR classification table to the right does not include a total of four hotel/motel properties that were not included in STR's inventory but were included in the lodging database provided by the SPICVB.

STR Property Classification	# of Properties	# of Rooms	% of Market
Upper Upscale	4	567	25.0%
Upscale	3	229	10.1%
Upper Midscale	6	522	23.0%
Midscale	10	831	36.6%
Economy	2	120	5.3%

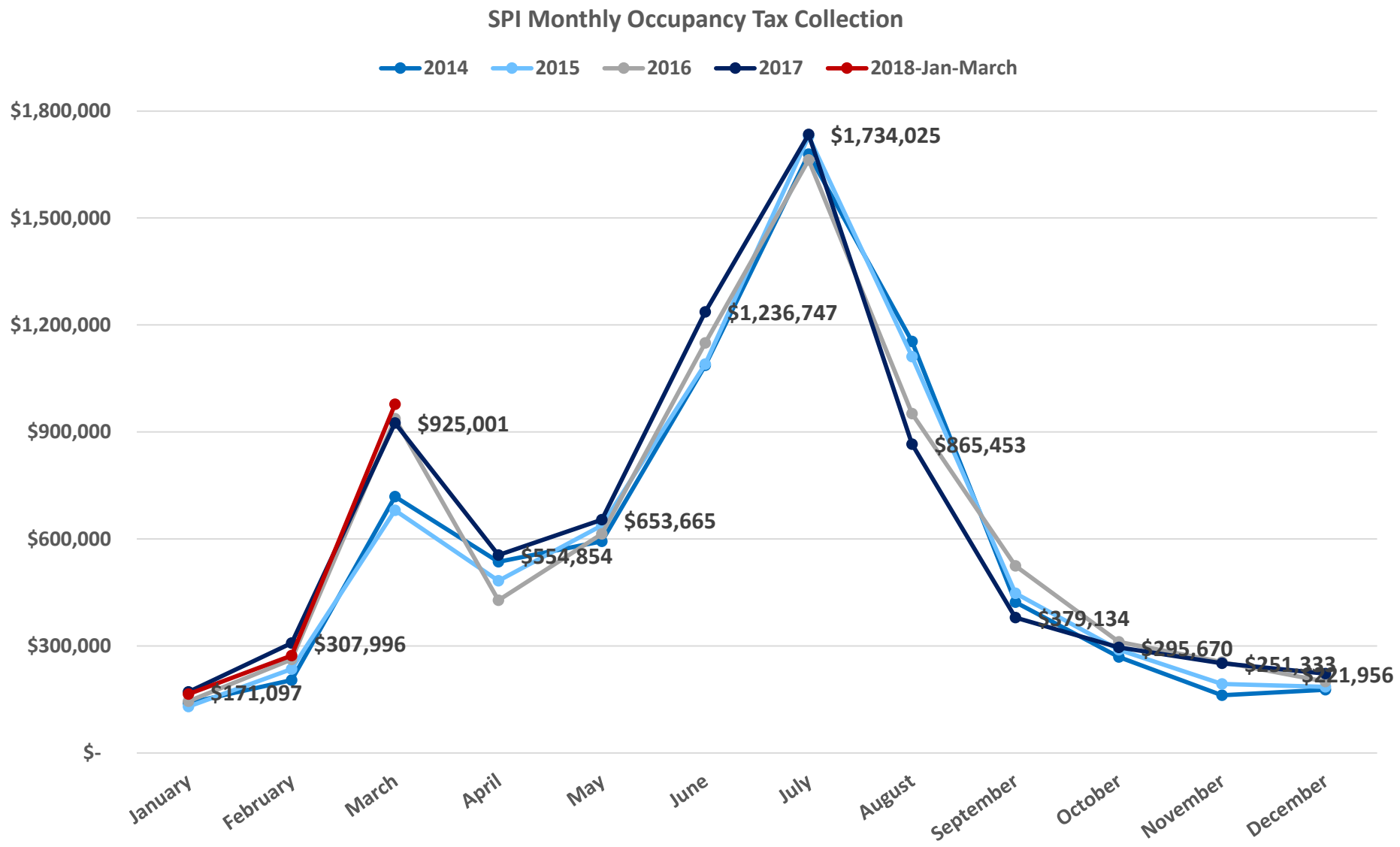
South Padre Island – Hotel/Motel Lodging properties

- Best Western Beachside Inn
- Blue Bay Inn and Suites
- Casa Bella Hotel & Suites
- Comfort Suites
- Budget Host-Flamingo Motel
- Hilton Garden Inn South Padre Island
- Holiday Inn Express & Suites South Padre Island
- Isla Grand Beach Resort
- Island Inn
- La Copa Inn Beach Hotel
- La Quinta Inn & Suites South Padre Island
- Motel 6 South Padre Island TX
- Padre South Hotel
- Pearl South Padre
- Ramada Hotel & Suites South Padre Island
- Schlitterbahn Beach Resort
- South Beach Inn
- South Padre Motel
- South Padre Island Inn
- South Padre Island Lodge
- Suites at Sunchase
- Super 8 South Padre Island
- Surf Motel & Boomerang Billy's Beach Bar
- The Inn at South Padre
- Lighthouse Inn
- The Palms Resort
- Upper Deck Hotel & Bar
- Wanna Wanna Inn Beach Bar & Grill
- WindWater Hotel & Resort

Source: Google maps

South Padre Island, TX MONTHLY LODGING TAX REVENUE Analysis

The chart below was created using the tax revenue figures from the 8% portion of the lodging occupancy tax as collected by the City Of South Padre Island..



SOUTH PADRE ISLAND STR HOTEL LODGING REPORT CARD

South Padre Island, TX	2012	2017	% of Growth
SPI Lodging Inventory (rooms)	2,157	2,373	10.0%
STR Occupancy Rate	58.1%	60.5%	+4.1%
STR ADR (Average Daily Rate)	$102.26	$113.84	+11.3%
STR Room Nights Sold/Room Demand	448,216	496,184	+10.7%
TOTAL Room Revenue – calendar year (STR-participating properties ONLY)*	$45,836,464	$56,484,902	+23.2%

Source: STR 6-Year Trend Report

US Hotels – Key Performance Indicators						
Year	Occupancy	% of Change	ADR	% of Change	RevPAR	Change
2011	60.0%	~	$101.64	~	$61.06	~
2012	61.4%	2.3%	$106.08	4.4%	$64.98	6.4%
2013	62.3%	1.4%	$110.35	3.9%	$68.69	5.4%
2014	64.4%	3.4%	$115.32	4.6%	$74.28	8.3%
2015	65.4%	1.6%	$120.29	4.3%	$78.67	5.9%
2016	65.5%	0.1%	$123.97	3.1%	$81.19	3.2%
2017	65.9%	0.9%	$126.72	2.1%	$83.57	3.0%

Source: STR annual US Hotel - KPI's, reported annually in STR Hotel News Now.

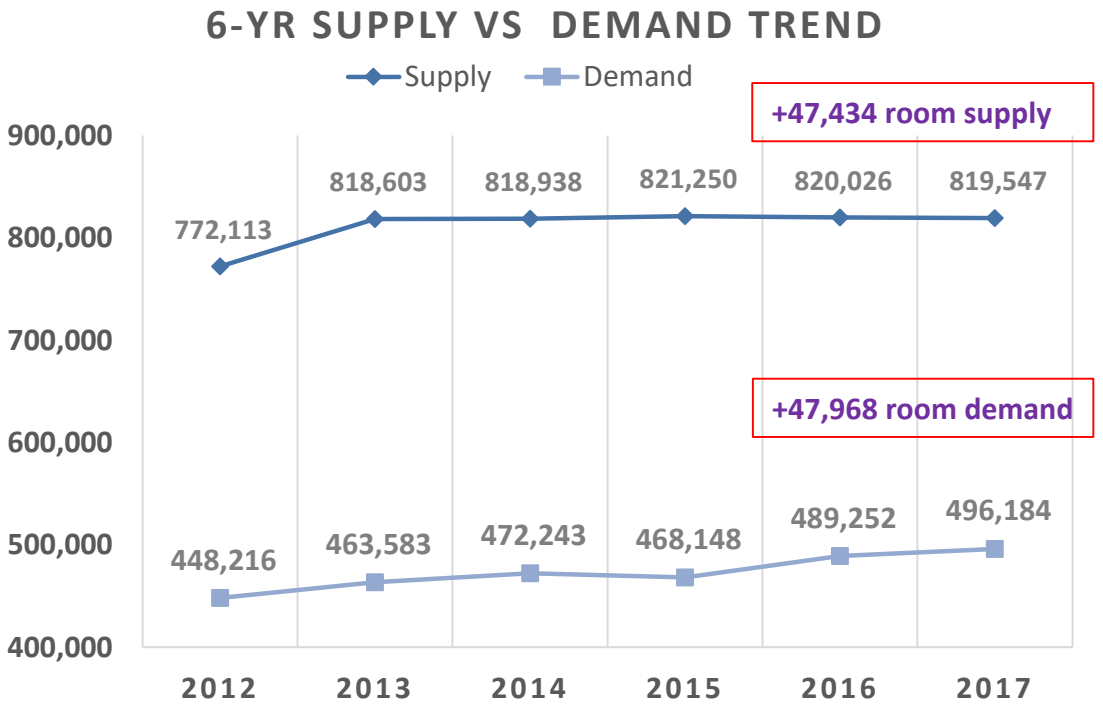
Supply vs. Demand 2012-2017				
	Supply	% Chg	Demand	% Chg
2012	772,113	~	448,216	~
2013	818,603	6.0%	463,583	3.4%
2014	818,938	0.0%	472,243	1.9%
2015	821,250	0.3%	468,148	-0.9%
2016	820,026	-0.1%	489,252	4.5%
2017	819,547	-0.1%	496,184	1.4%

Source: STR

Note:
A total of three properties with 459 rooms have opened in the last 10 years in South Padre Island. The Suites at Sunchase (2008, 87 rooms), the Hilton Garden Inn Beach Resort (2010, 156 rooms) and the Schlitterbahn Beach Resort (2012, 216 rooms) reopened an existing property that had been closed for renovation. These three properties account for 19.3% of the total hotel/motel lodging room inventory.

Observations:

- Room supply experienced an overall increase of 6% in 2013 (Schlitterbahn reopened property after renovation) as compared to 2012 and has remained flat with no hotel development since 2013.
- Room demand has increased 10.7% comparing total rooms sold in 2017 to 2012. The chart bellows shows the market took four years to absorb the 2013 growth in supply.

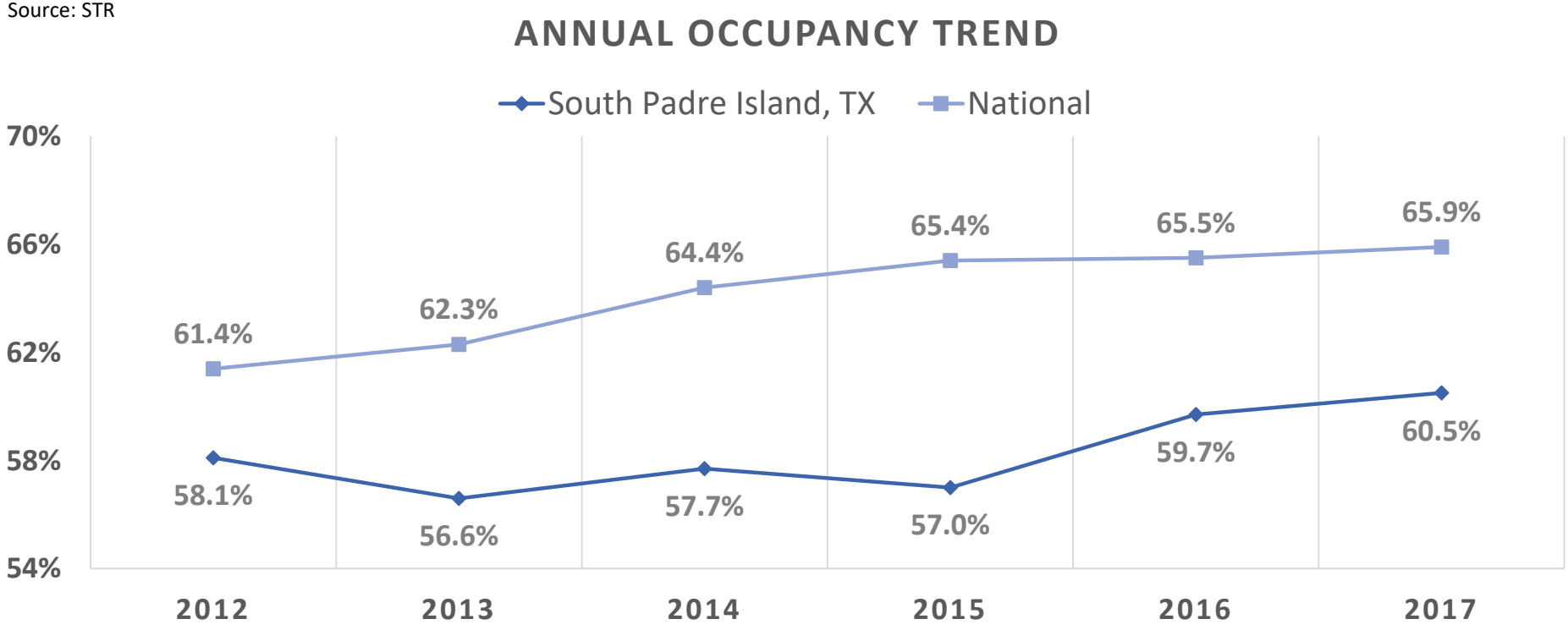


Source: STR

Annual Occupancy Trend 2012 - 2017				
	South Padre Island, TX	% of Chg	National	% of Chg
2012	58.1%	~	61.4%	~
2013	56.6%	-2.4%	62.3%	1.4%
2014	57.7%	1.8%	64.4%	3.4%
2015	57.0%	-1.1%	65.4%	1.6%
2016	59.7%	4.7%	65.5%	0.1%
2017	60.5%	1.5%	65.9%	0.9%

Source: STR

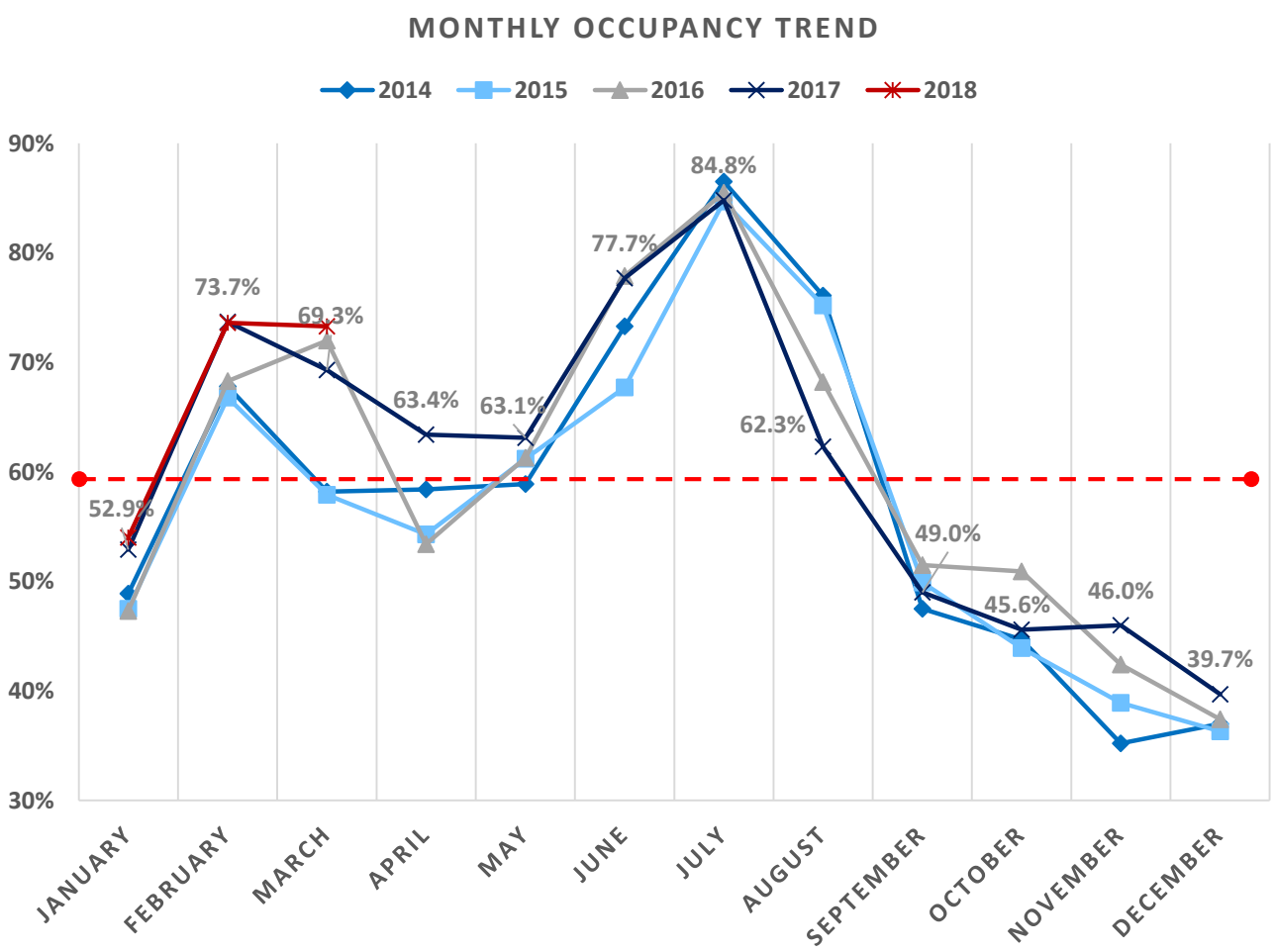
Observations:
As seen in the table and chart below, occupancy levels have fluctuated over the 6-year period of 2012 – 2017. A dip in occupancy was seen in 2013 when the Schlitterbahn Resort was opened in late 2012 with 216 renovated rooms (supply increase). While room demand was up in 2013, it struggled to keep pace with the new room supply thus a slight decline in 2013 lodging occupancy. Despite a slight dip in room demand and occupancy in 2015, the SPI's lodging market has performed well over the last six years absorbing the increase in supply and driving occupancy up..



South Padre Island CVB
Lodging Analysis

South Padre Island Hotel/Motel Monthly Occupancy					
	2014	2015	2016	2017	2018
JAN	48.9%	47.5%	47.3%	52.9%	54.0%
FEB	67.8%	66.8%	68.3%	73.7%	73.6%
MAR	58.2%	57.9%	72.0%	69.3%	73.3%
APR	58.4%	54.3%	53.4%	63.4%	
MAY	58.9%	61.2%	61.3%	63.1%	
JUN	73.3%	67.7%	77.9%	77.7%	
JUL	86.5%	84.7%	85.5%	84.8%	
AUG	76.1%	75.2%	68.2%	62.3%	
SEP	47.5%	49.9%	51.5%	49.0%	
OCT	44.7%	43.9%	50.9%	45.6%	
NOV	35.2%	38.9%	42.4%	46.0%	
DEC	37.0%	36.3%	37.4%	39.7%	

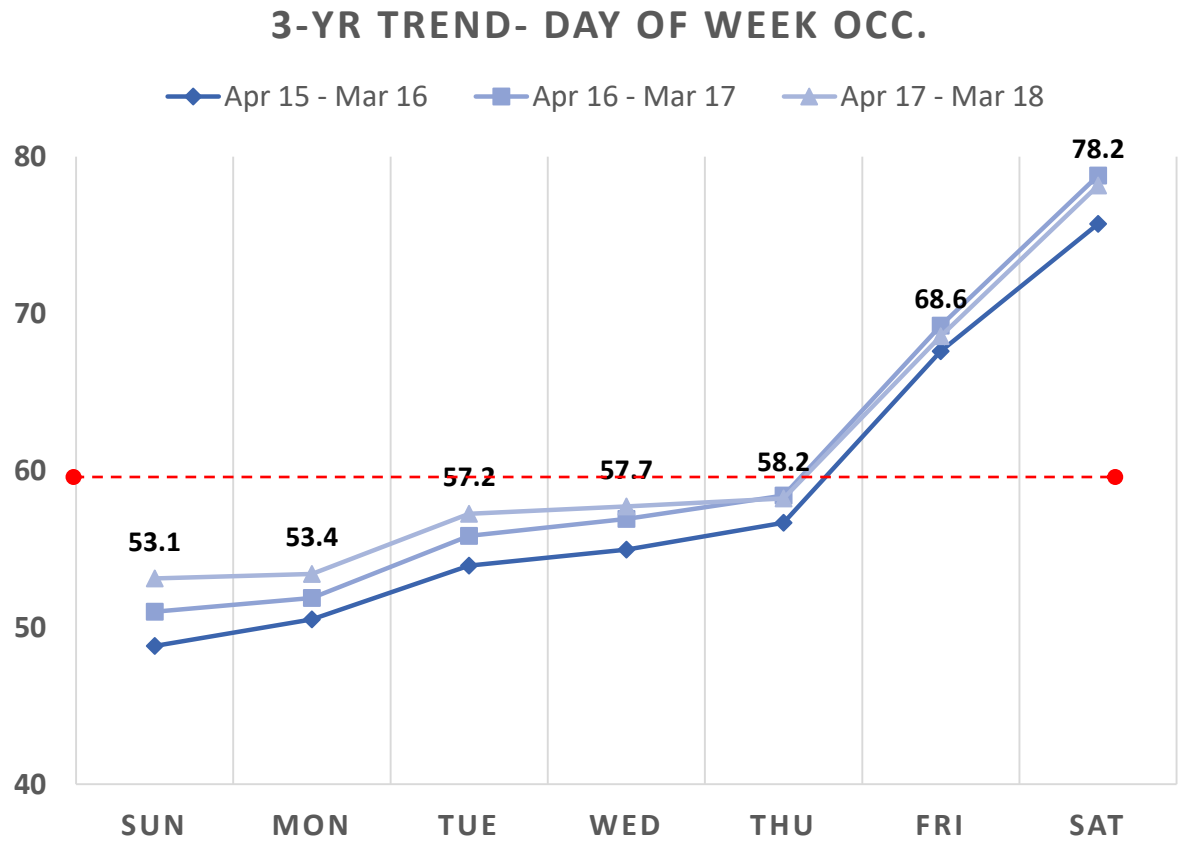
Source: STR



Observations:

- As expected, the highest occupancy %'s are found in the summer months of June through August with occupancy peaking in July. August 2017 experienced a decline due to Hurricane Harvey evacuations the last week of the month.
- February and March also perform well with Spring Break visitors. The remainder of the months are performing near or below the critical 60% mark.
- Need periods are September through January, as well as April/May.

Three Year Occupancy (%)							
	Sun	Mon	Tue	Wed	Thu	Fri	Sat
Apr 15 - Mar 16	48.8	50.5	53.9	55.0	56.7	67.6	75.7
Apr 16 - Mar 17	51.0	51.9	55.8	56.9	58.4	69.2	78.8
Apr 17 - Mar 18	53.1	53.4	57.2	57.7	58.2	68.6	78.2
Total 3 Yr	**51.0**	**51.9**	**55.7**	**56.5**	**57.8**	**68.5**	**77.6**



Observations:

- Data shows weekends (Friday and Saturday) run highest occupancy in the average range of 68% – 79% over the last 3 years.
- This data is very reflective of the market segmentation data collected in the YSI survey, whereas leisure transient accounts for 68% of the room nights sold in hotel/motel(s) and 74% of the room nights sold in vacation rental units.

Source: STR

STR Participating Hotel/Motel 6 - Year ADR and RevPAR Trends

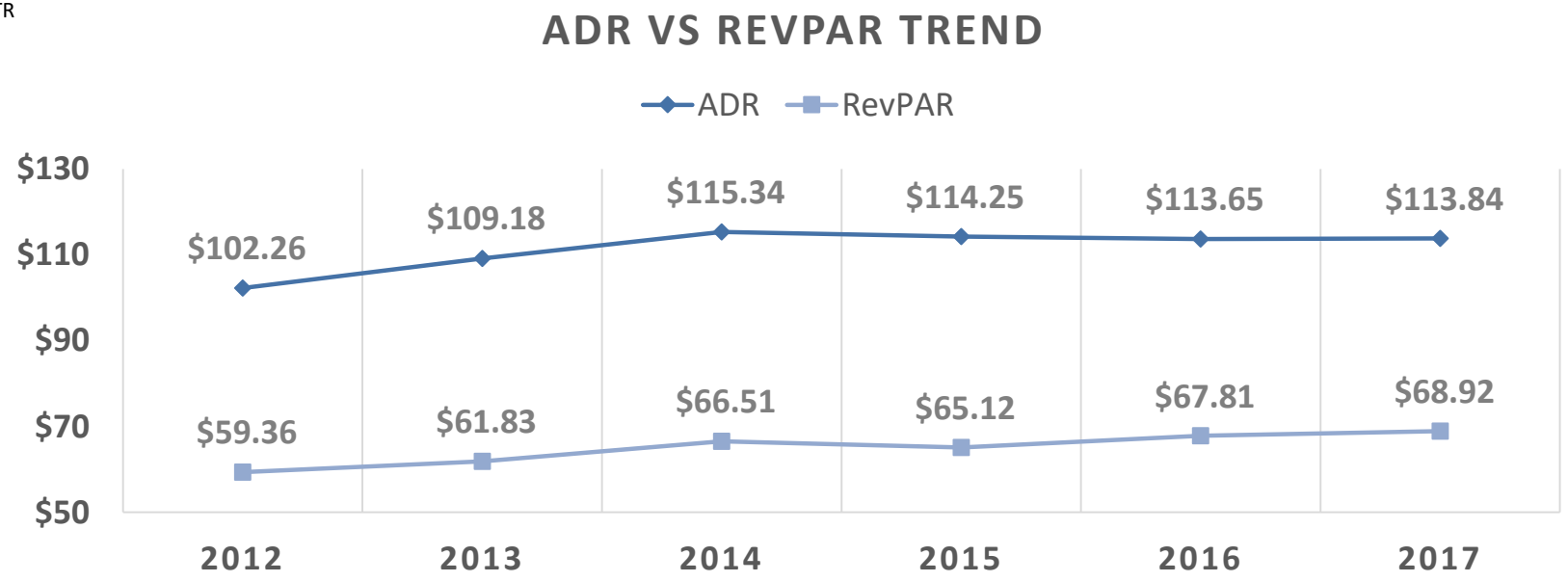
South Padre Island's STR-participating properties reported ADR and RevPAR as shown in tables and charts below.

ADR vs. RevPAR 2012-2017				
	ADR	% Chg	RevPAR	% Chg
2012	$ 102.26	~	$ 59.36	~
2013	$ 109.18	6.8%	$ 61.83	4.2%
2014	$ 115.34	5.6%	$ 66.51	7.6%
2015	$ 114.25	-0.9%	$ 65.12	-2.1%
2016	$ 113.65	-0.5%	$ 67.81	4.1%
2017	$ 113.84	0.2%	$ 68.92	1.6%

Source: STR

Observations:

- ADR was on a positive 3-year trend 2012 – 2014 until 2015 when hoteliers lowered ADR (Average Daily Rates) in response to a slight dip in room demand. ADR continued to decrease in 2016 and remained flat in 2017.
- Likewise, RevPAR (Revenue Per Available Room) was also on the same trend line with the exception of slight increase in 2016 and 2017 when room demand was back up. This is an important trend to watch as the lodging industry tracks RevPAR as a key indicator of lodging success and profitability.

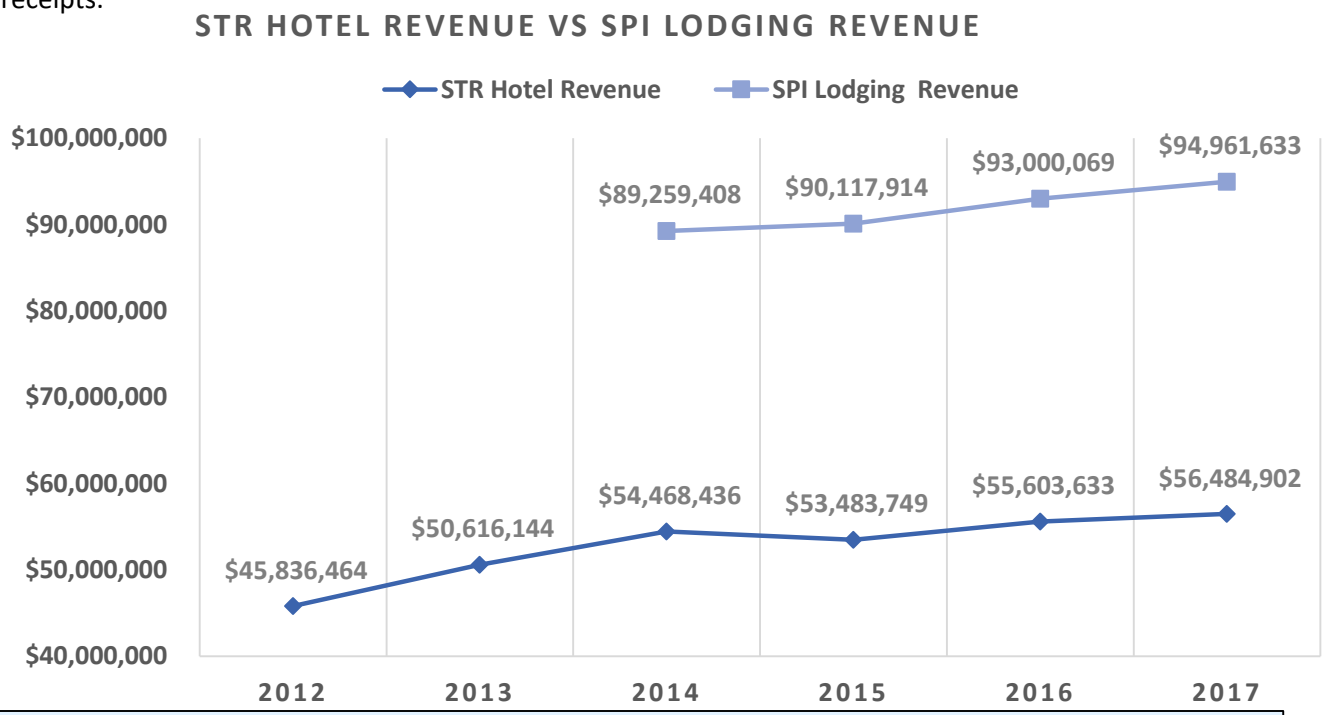


STR Hotel/Motel 6-YR Revenue Trends & Total SPI Revenue

STR-participating properties reported Revenue, ADR and RevPar as shown in tables and charts below with a comparison to total revenue from all lodging (hotels and vacation rentals calculated from tax receipts.

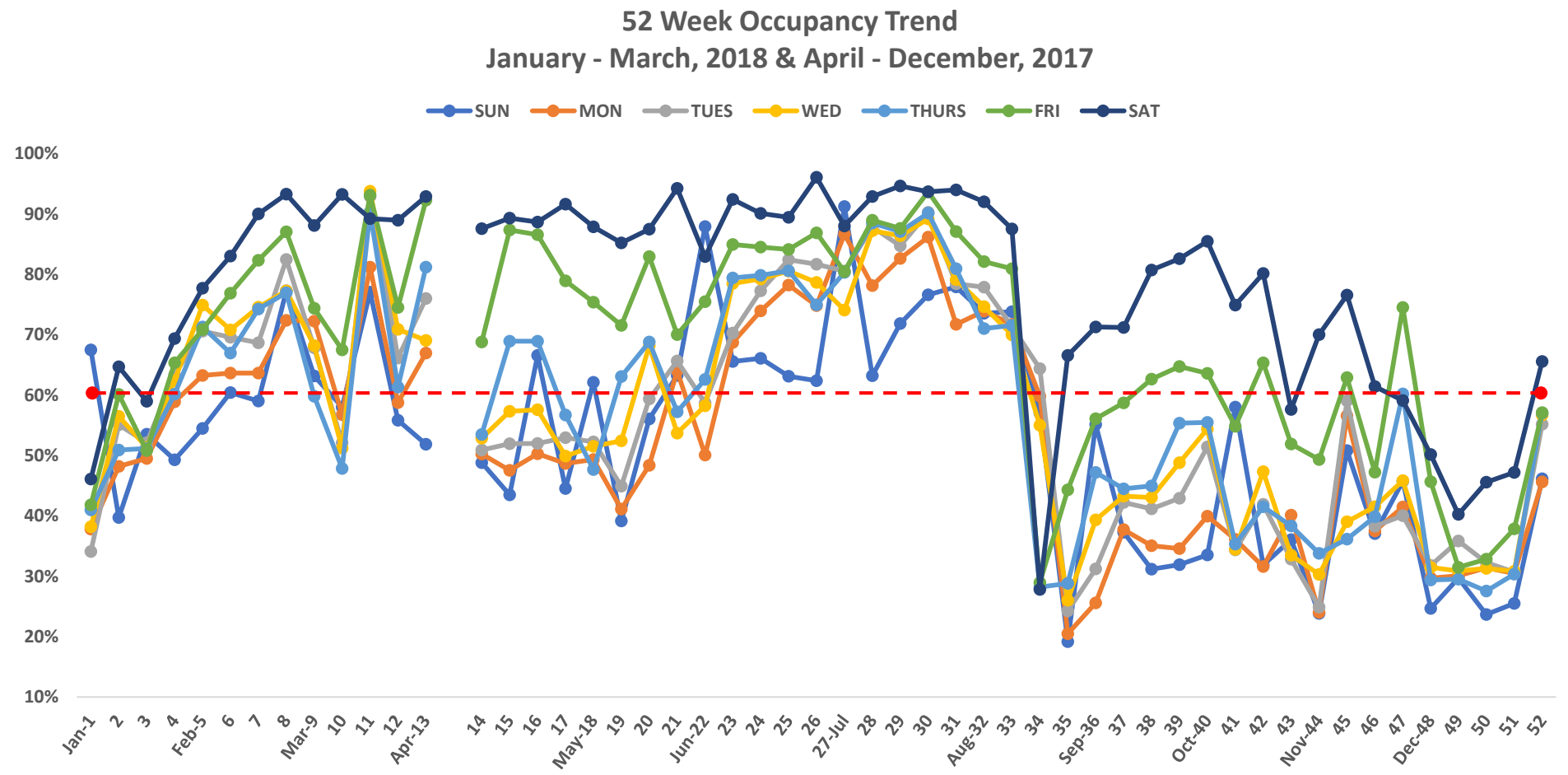
Annual Revenue Trend 2012- 2017		
	Revenue	% Chg
2012	$ 45,836,464	~
2013	$ 50,616,144	10.4%
2014	$ 54,468,436	7.6%
2015	$ 53,483,749	-1.8%
2016	$ 55,603,633	4.0%
2017	$ 56,484,902	1.6%

Source: STR



Observations:

- The revenues in the above table are for hotel/motel properties only according to STR and do not include vacation rental revenue. The chart on the right includes the STR data for hotels in the lower line and the total lodging revenue in the SPI market as calculated from the 8% tax submitted to the SPICVB. The difference between the STR reported hotel revenue and the total is revenue from rentals.
- Overall, the South Padre Island hotel/motel lodging market experienced increasing revenues over the last 6-years with the exception of the slight decline in 2015 due to a 0.9% decrease in room demand combined with a 0.9% decrease in ADR.
- It must also be noted that not all room revenue is taxable (government and long-term rental rooms are exempt), therefore actual lodging tax revenues will not compare with this data.



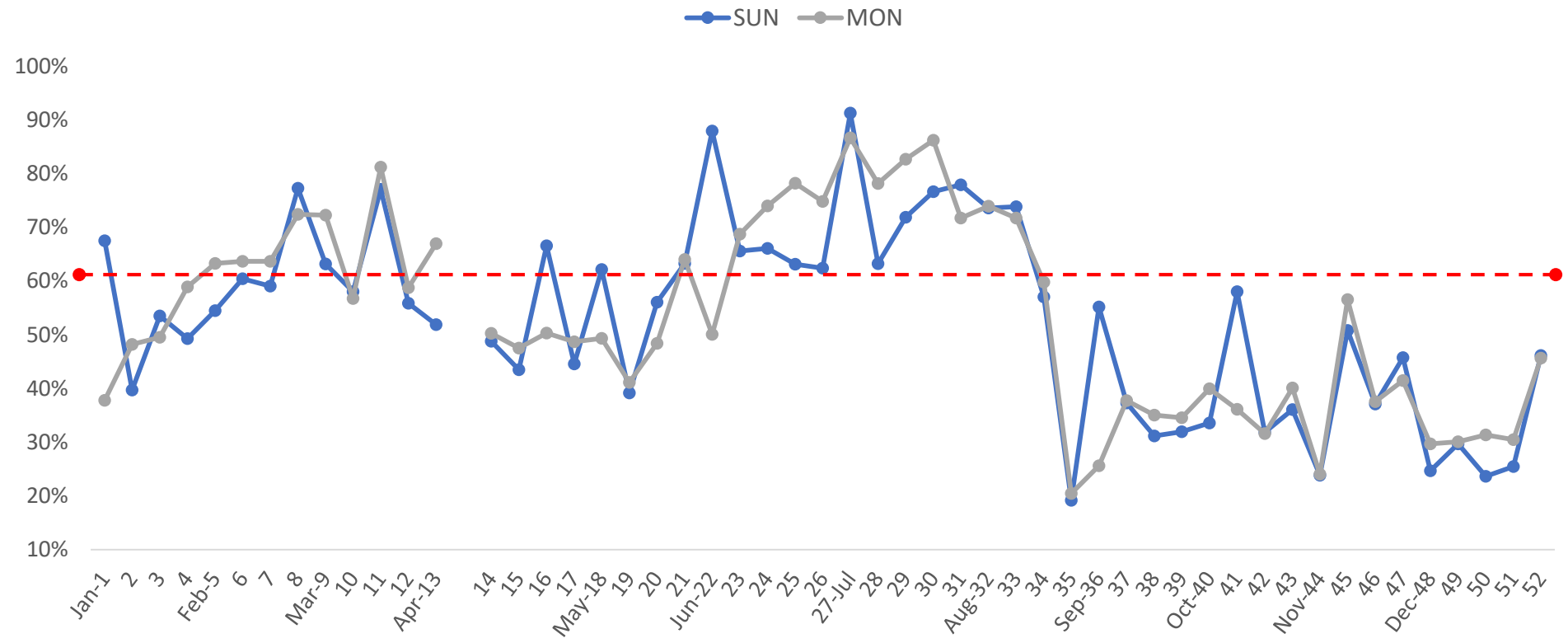
Daily Occupancy %'s	# of days	% of YR
Days reported at 60% - 69%	52	14.2%
Days reported at 70% - 79%	59	16.2%
Days reported at 80% - 89%	54	14.8%
Days reported at 90% - 100%	24	6.6%

Total # of Days 60% or higher occupancy

189 nights = 51.8% of the year

Source: STR

Sunday - Monday Occupancy Trend
January - March, 2018 & April - December, 2017

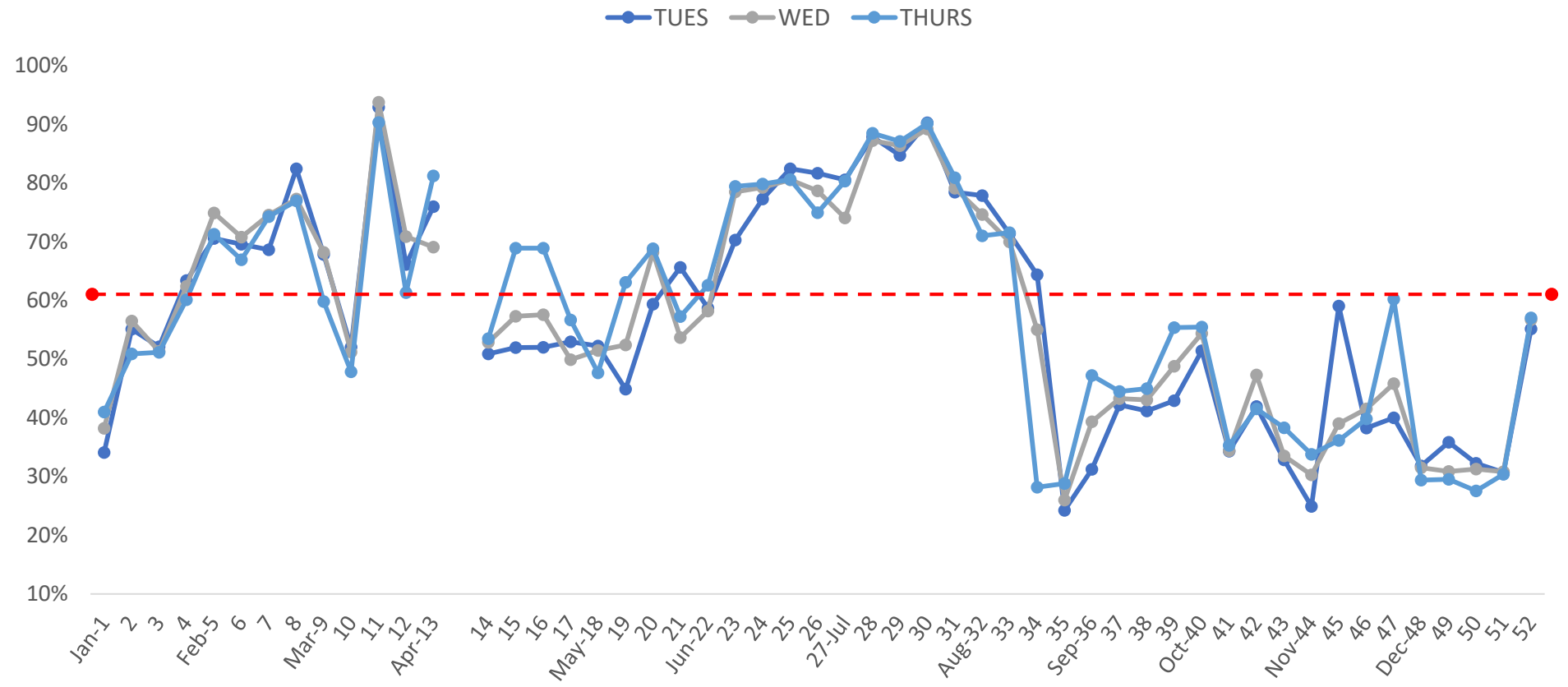


Source: STR

Observations:

- As shown in the graph above, occupancy percentages for Sunday and Monday nights were reported below the 60% occupancy mark for nearly seven months of the year.
- Sunday percentages range between a low of 19.2% - to a high of 91.2% while Monday nights report in the range of a low of 20.5% to a high of 86.6%.
- New business in all segments is needed throughout the year to fill Sunday and Monday nights.

Midweek (Tuesday - Thursday) Occupancy Trend
January - March, 2018 & April - December, 2017

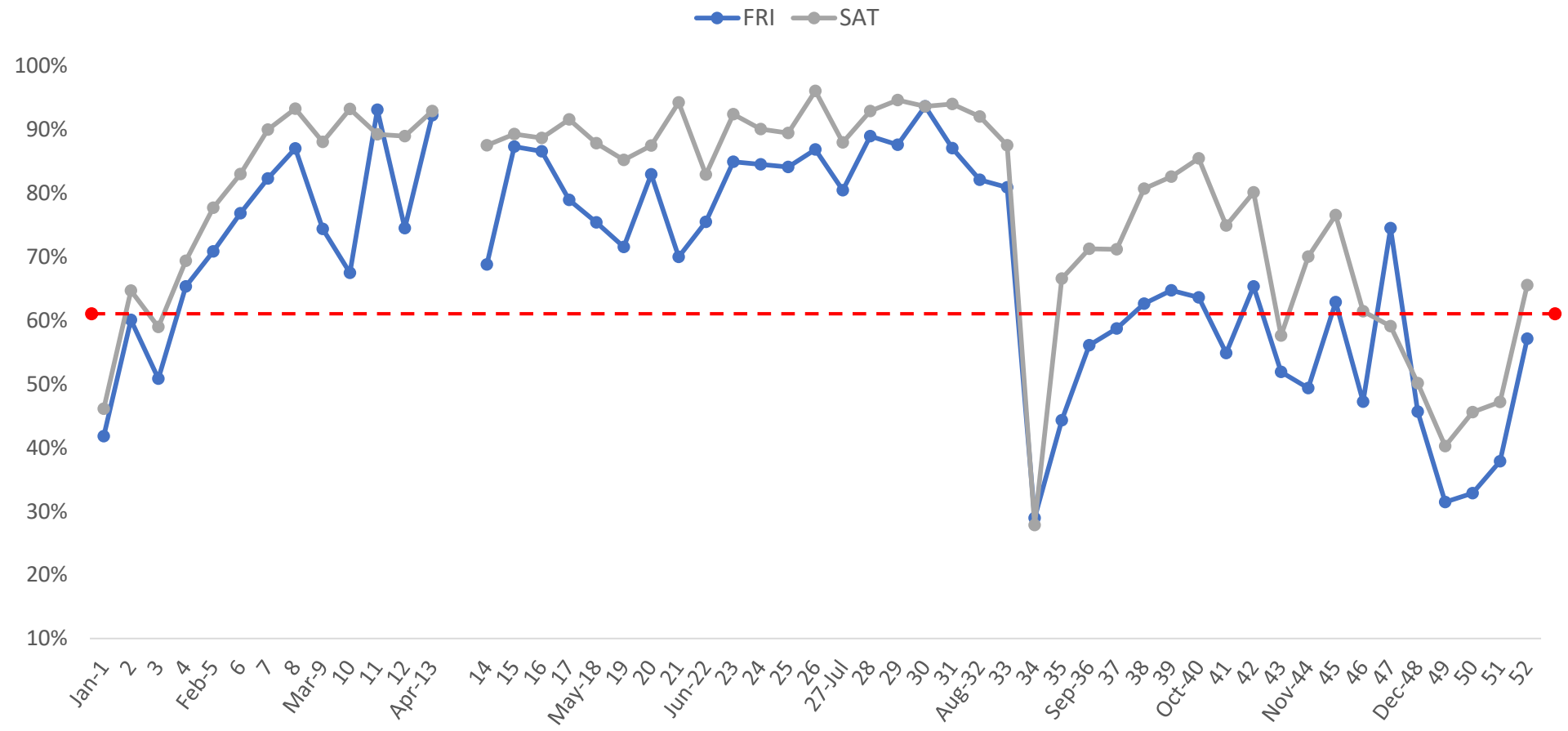


Source: STR

Observations:

- Average occupancy percentages midweek (Tuesday through Thursday) are very slow for South Padre Island properties for a majority of the year.
- Needs periods are primarily the months of August through December and April through May. A group strategy must be developed to fill Tuesday- Thursday room nights.

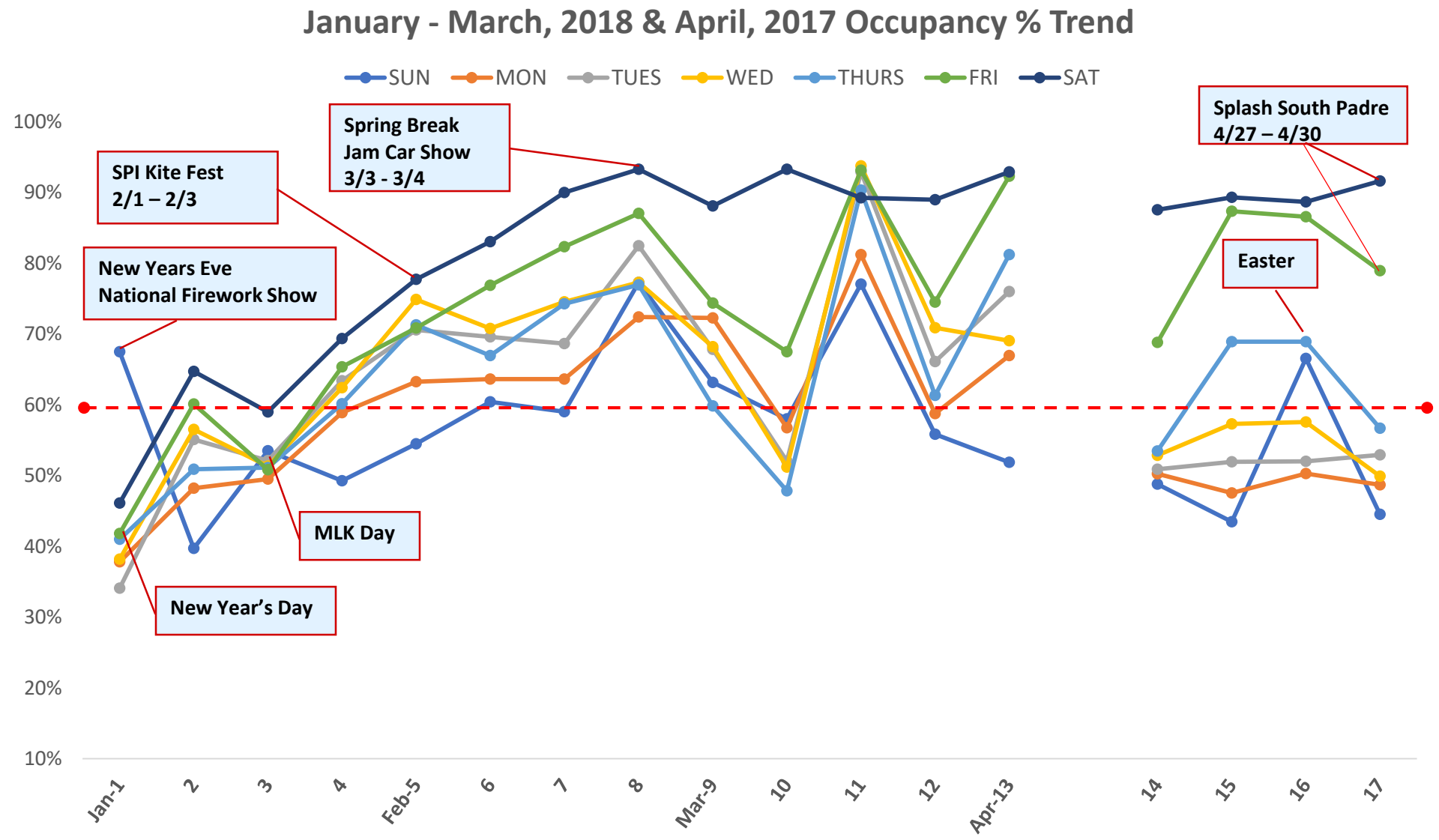
Weekend (Friday - Saturday) Occupancy Trend
January - March, 2017 & April - December, 2017



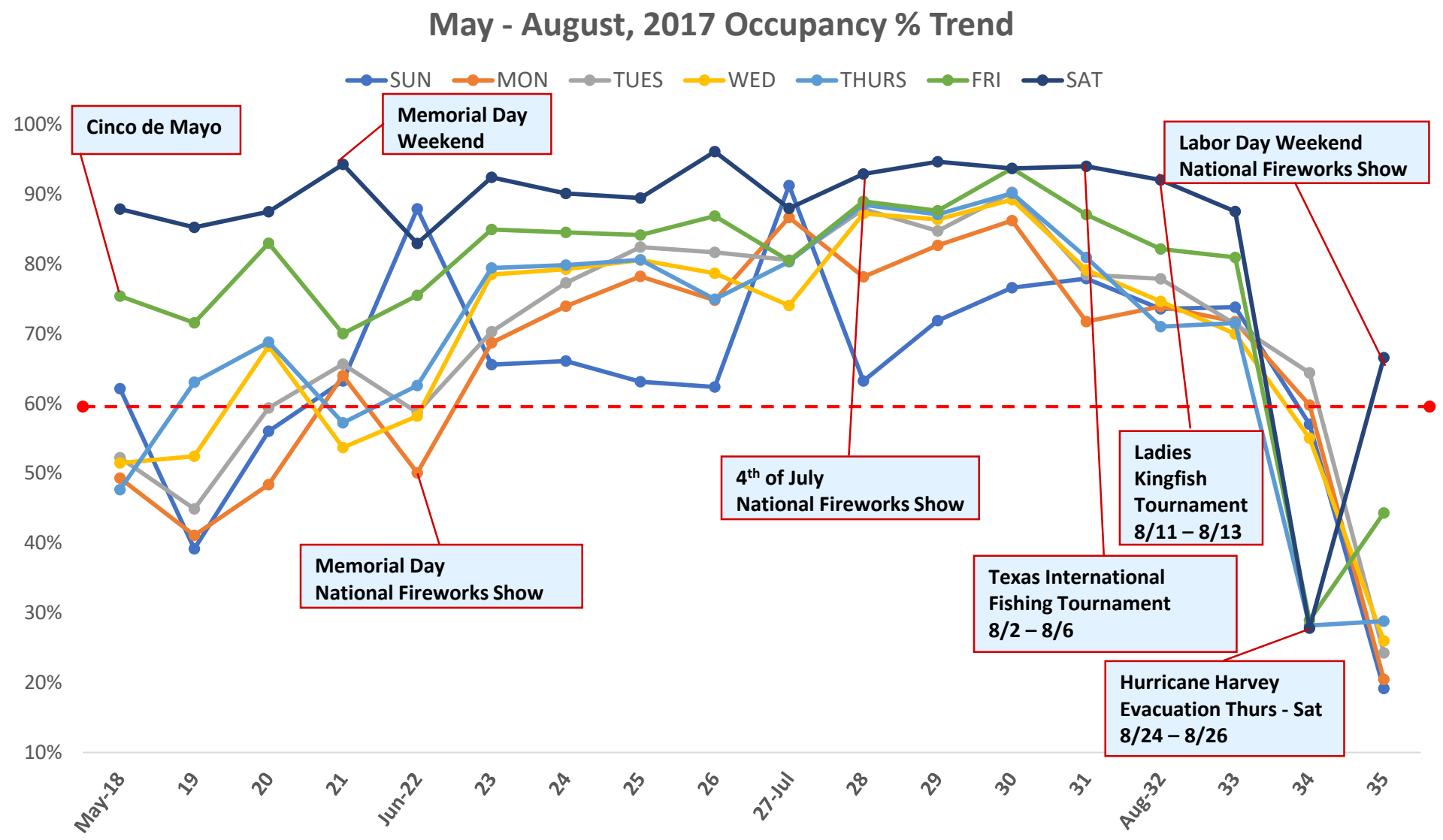
Source: STR

Observations:

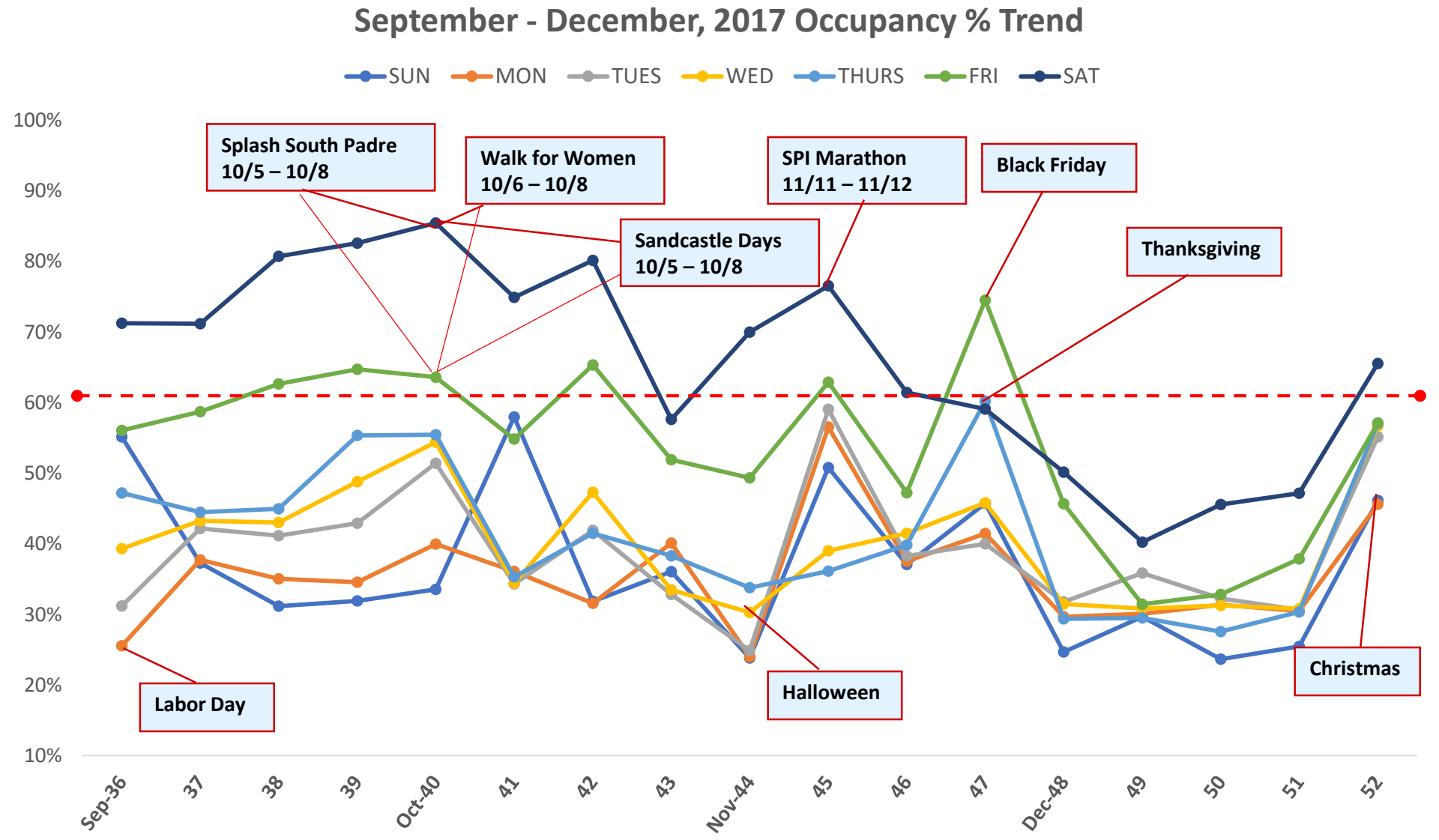
- Weekend occupancy is performing well above the critical 60% mark for a majority of the weeks February through July.
- An extreme fall-off in occupancy is noted beginning in August when students are returning to school and continuing through January. New promotions are needed to bring in adult-only travel parties to off-set these need periods.


January - March, 2018 & April, 2017 Occupancy % Trend
SUN
MON
TUES
WED
THURS
FRI
SAT
100%
90%
80%
70%
60%
50%
40%
30%
20%
10%
SPI Kite Fest
2/1 – 2/3
New Years Eve
National Firework Show
Spring Break
Jam Car Show
3/3 - 3/4
MLK Day
New Year's Day
Splash South Padre
4/27 – 4/30
Easter
Jan-1
2
3
4
Feb-5
6
7
8
Mar-9
10
11
12
Apr-13
14
15
16
17

Source: STR


May - August, 2017 Occupancy % Trend
SUN
MON
TUES
WED
THURS
FRI
SAT
100%
90%
80%
70%
60%
50%
40%
30%
20%
10%
May-18
19
20
21
Jun-22
23
24
25
26
27-Jul
28
29
30
31
Aug-32
33
34
35
Cinco de Mayo
Memorial Day Weekend
Memorial Day National Fireworks Show
4th of July National Fireworks Show
Texas International Fishing Tournament 8/2 – 8/6
Ladies Kingfish Tournament 8/11 – 8/13
Labor Day Weekend National Fireworks Show
Hurricane Harvey Evacuation Thurs - Sat 8/24 – 8/26

Source: STR


September - December, 2017 Occupancy % Trend
SUN
MON
TUES
WED
THURS
FRI
SAT
100%
90%
80%
70%
60%
50%
40%
30%
20%
10%
Splash South Padre 10/5 – 10/8
Walk for Women 10/6 – 10/8
Sandcastle Days 10/5 – 10/8
SPI Marathon 11/11 – 11/12
Black Friday
Thanksgiving
Labor Day
Halloween
Christmas
Sep-36
37
38
39
Oct-40
41
42
43
Nov-44
45
46
47
Dec-48
49
50
51
52

Source: STR

South Padre Island Market Segmentation – YSI Hotel/Motel and VRM Surveys

The YSI survey of the South Padre Island hotel/motel and vacation rental managers revealed the market segments that are driving overnight visitation within the destination. Corporate and group business are tracked closely by rate codes, while leisure segment data is often collected by the management team at the individual properties. Rank order is shown in table below:

Hotel/Motel	VRM	2017 Market Segmentation
79.9%	**97.9%**	**Transient**
68.2%	**74.2%**	Leisure Transient- (sightseeing, visiting friends & relatives, shopping, dining, etc.)
9.0%	23.7%	Long-term winter rental
2.7%	~	Business Transient- (individual business travelers and skilled workers)
20.1%	**2.1%**	**Group / Conference / Meeting**
13.2%	~	Business / Meeting / Conference
6.9%	~	SMERF (Social, Military, Educational, Religious, Fraternal)

Source: YSI survey of South Padre Island lodging properties

Observations:

- This data confirms South Padre Island is a leisure destination with nearly 70% of hotel/motel room nights sold being driven by the leisure transient segment and 74% of the vacation rental market. STR data confirmed these findings with Friday and Saturday nights running highest occupancy in South Padre Island throughout the year.
- South Padre Island hotel/motel managers reported long-term winter rental as the next highest segment at 9%, while VRMs reported this segment at 24%. Group/conference/meeting accounted for 20% of room nights sold in hotel/motel(s) with just 2% in the vacation rentals.
- This indicates a heavy reliance on the leisure segments to drive room nights in South Padre Island. Dependence on any one segment can be a dangerous trend and thus must be monitored closely. The SPICVB must continue to work on diversification and expansion of market share in other adult-only and group segments.

Future Target Geographic Segments (Rank Order)

Having established the current market segmentation for those staying in South Padre Island, TX lodging, YSI asked the lodging property managers to indicate in rank order what geographic markets they would like the SPICVB to target for their future sales and marketing efforts. The prioritized ranking for future sales and marketing efforts by South Padre Island Convention & Visitors Bureau is shown in the table below as provided by the lodging properties that responded to this question. Note: Top 4 recommended priority markets (3.9 or lower) are highlighted in the table below.

Geographic Segment	Hotel Motel	VRM
San Antonio	**2.6**	**3.3**
Rio Grande Valley	**3.1**	5.3
Houston	**3.5**	**3.2**
Dallas / Fort Worth	**3.9**	**3.6**
Mexico	4.3	4.9
West Texas	5.6	4.3
Oklahoma	5.8	5.0
Canada	7.2	6.0

Travel Party Make-up

VRM managers reported the percentage of their travel parties that were families traveling with children and those which were adults traveling alone. While more travel parties were families traveling with children, there was still a large percentage of travel parties that were reported to be adults only.

Party Makeup	% 2017 guests
% Families with children	58%
% adults only	42%

Source: YSI survey of South Padre Island hotel properties & VRM managers

Percentage of room nights sold originating from geographic areas

Lodging property managers were asked report the percentage of room nights sold originating from Texas, Mexico, Canada, and other U.S. states. Lodging managers reported the majority of room nights are sold to Texans and Texans own the majority of rental units in the inventory. Americans from states other than Texas make up the next largest percentage of renters and owners followed by Mexicans and Canadians.

Geographic Market	Hotel/Motel % of room nights sold	VRMs % of guests	VRM % of owners
Texas	75.2%	58.7%	64.4%
Mexico	9.4%	5.3%	5.9%
Canada	1.4%	4.3%	0.3%
Other U.S. states	14.0%	31.7%	29.4%

Leisure Feeder Markets

Hotel/Motel managers were asked to list the top four cities they recommend as future target markets for the South Padre Island Convention & Visitors Bureau advertising to increase visitors to South Padre Island. The markets are ranked by the total number of responses by hoteliers and their top responses are provided in the table to the right. South Padre Island's close proximity to US-77 brings in visitors from the 3-6 hour drive market.

Future Target Markets to drive increased leisure visitors	# of Responses
Austin, TX (189 miles)	8
Houston, TX (375 miles)	5
Laredo, TX (408 miles)	4
San Antonio, TX (333 miles)	4

Page held for addition of VRM Intel data

2017 Annual Occupancy
VRM managers were asked to report their 2017 annual occupancy. The average annual occupancy of the VRMs that responded to the survey was reported at **52%** with a range of 38.3% - 80.0%.

2017 Length of Stay
Length of stay was reported with a range of 4 nights to 69 nights. The average length of stay was reported to be 16.6 nights. This number is skewed as nearly one third of the market was reported to be long-term winter rentals.

Hoteliers were asked to provide their input on the biggest challenges in marketing their property.
6 properties responded; verbatim comments are below:

- Airport and getting customers to get here therefore that's why the local market is very important since it's a drive market versus fly.
- Finding business in the off-season.
- Finding guests that are willing to book in the off season.
- Finding guests that are willing to book in the off season.
- Getting higher rates
- High hotel tax. Room rates are fine until you give the rate + hotel tax + state tax + city tax + county tax
- Rate integrity from island hotels.
- SPI is a year-round destination. Uniqueness/diversity of our property. We are a beachfront resort with a waterpark, not a waterpark with a hotel. Enough "other" things to do on the Island. Distance from airports.
- The off season.

Hoteliers were asked to provide any insight into major shifts or changing trends in room night sales in South Padre Island over the last year.
8 properties responded; verbatim comments are below:

- 90% sales coming from 3rd party booking sites, 10 from my website
- Decrease in traffic from Mexico
- Fewer guests coming from Mexico
- Hurricane Harvey played a big role in large group cancellations for the month of Sept and Oct
- Increase in association business, drop in Houston market, Spring Break- less demand, Semana Santa- less demand.
- June, July, August, and September were down from 2016 by around 10%
- Less Mexican travel
- More younger couples checking in. Due to work with the new LNG, workers are staying with us. Online bookings are way up.

Hoteliers were also asked to provide any suggestions for future sales and marketing efforts for the South Padre Island Convention & Visitors Bureau.

9 properties responded; verbatim comments are below:

- Do more research on what type of demographic would be willing to travel in the off season and target them for the marketing efforts. For example, kite boarders, birders, fisherman, etc.
- Events that target younger, more affluent demos (Austin area especially). More aggressive Austin market. Better job recruiting group business from within the RGV. Create more urgency for upper valley RGV to visit SPI. Winter Texan "home states". Monterrey, Mexico. Late March, April, September- early November is best weather of the year and some of the slowest months- this needs to be addressed with clearer messaging.
- More focus on promoting the island activities nationally not just local.
- More online, social media presence versus old fashion billboards and airport signs. People are always shopping online whether for vacation or personal. That's where the bug should be planted as far as making us their destination. Majority of Spring breakers use online for their research versus seeing a billboard or reading a magazine. Overall online marketing should be enhanced.
- Research and market to the demographic that travels in the off season such as kite boarders, home school parents, birders, etc. Do more marketing in Mexico.
- SPI needs a large billboard south of San Antonio that would market to ANY traveler going to Corpus, Part A, and North Padre
- Stop using Atkins group, its not working. Start doing more TV, billboards, bus advertising, bench advertising.
- Target and market outside the RGV. We need to get a bigger market share from Corpus, Galveston, and other TX beaches.
- Target the travelers in the demographic that are willing to book in the off season such as kite boarders, bird watchers, etc.

VRM managers were asked to provide any insight into major shifts or changing trends in how guests are making their reservations.

7 VRM mangers responded; verbatim comments are below:

- A lot of people want to just post on SPI Concierge and have us all make offers through messenger. No one wants to call anymore.
- Guests are choosing to book through distribution channels like Airbnb, Homeaway, and Flipkey. The search engine rankings go to the big companies. People want to book online. Our regular phone call reservations were cut by more than 40% from 2016 to 2017.
- Less number of days booked
- Much more online
- Opting to use booking platforms to make reservations, VRBO, etc. Reservations are also tending to be for less nights than previous years.
- Shorter stays. Primary guests group other than Winter Texan are mostly people from San Antonio, Houston, and RGV. North and Central Texas guests have declined.
- Stays have gotten shorter over the past 5 years.

VRM managers were also asked to provide any suggestions for future sales and marketing efforts for the South Padre Island Convention & Visitors Bureau.

4 VRM managers responded; verbatim comments are below:

- Austin!!
- Concentrate on this being a destination for families, middle aged adults, and seniors- not so much on spring breakers, more and more property owners are not wanting these reservations.
- Less internet driven marketing. More national television ads and vacation oriented publication ads
- Shoulder season events and activities.

VRM managers were asked if their marketing strategies changed in 2017 from previous years.
6 of the 7 properties that responded to our survey reported that their marketing strategies had changed.
Yes:

- Increased advertising dollars
- Less money in print and more in internet advertising
- More aggressive marketing (email campaign)
- More marketing to my website directly
- On Facebook more than I would hope to try and get bookings.
- Where we used to compete more heavily for Google rankings we now must compete for placement inside the separate distribution channels. Where do our properties rank when a person goes to Homeaway, VRBO, AirBnB, Trip Advisor, etc. Now Expedia and Booking are fully in the game. We not only need to be on these channels we need to rank well within their listings for South Padre Island. We are spending much more time and money on content.

No:

- No, we didn't change our strategy, but we should have.

South Padre Island CVB
Visitor Profile Research

YOUNG strategies, inc.
fresh. travel. research.

Methodology

An online survey instrument was prepared by the Young Strategies research team and approved by SPICVB staff. The survey contained 66 questions and skip logic with no one respondents answering more than 24 questions. The survey included unique questions for prior visitors, those who had not visited, residents and vacation rental property owners. Recipients were invited to take a visitor survey and be entered into a chance to win one of two $250 VISA gift cards.

The survey was deployed through web-links, email invitations and Facebook invitations provided to 7 South Padre Island industry partners including: SPICVB Database-1,351; Sea Turtle Center-426; Padre Getaways-344; Schlitterbahn Waterpark-160; Breakaway Cruises-39; and Port Isabel Lighthouse-7.

Surveys received; N = 2,218

Of these,

- **1,503 were visitors to the area from outside the RGV**
- **271 were visitors from the Rio Grande Valley (Cameron, Hidalgo, Willacy & Starr counties)**
- **90 were part-time residents and/or long-term visitors of South Padre Island, Texas**
- **50 were residents of South Padre Island / Port Isabel, Texas**
- **304 had not visited SPI in the last 3 years**

Seasonal Visitor Profile

Spring N = 416
Summer N = 519
Fall N = 232
Winter Short-term N = 290
Winter Long-term N = 170

South Padre Island CVB
Visitor Profile

SPRING Visitor Profile Summary
March 2016 – May, 2018 *n = 414*

- Average age of respondents is 47.2 years old
  - Teens – 0.8%
  - Twenties – 14.2%
  - Thirties – 16.8%
  - Forties – 22.7%
  - Fifties – 19.8%
  - Sixties – 20.9%
  - Seventies – 4.5%
  - Eighties – 0.3%
- Gender of respondents :
  - 69.5% - Female
  - 29.2% - Male
  - 0.8% - Prefer not to answer
  - 0.3% - Transgender
  - 0.3% - Other
- Ethnicity of respondents:
  - White / Caucasian – 64.9%
  - Hispanic or Latino – 30.2%
  - Black or African American – 4.0%
  - Prefer not to answer – 4.0%
  - American Indian or Alaskan Native – 1.9%
  - Asian or Pacific Islander – 0.5%
- Life Stage:
  - Full-time employed (working outside the home/self employed) – 55.1%
  - Retired – 18.6%
  - Stay-at-home – 6.9%
  - Semi-retired – 5.1%
  - Full-time employed (working remotely from home) – 4.3%
  - Part-time employed – 4.3%
  - Student – 4.3%
  - Other – 1.6%
- Occupation:
  - Retired – 16.1%
  - Healthcare Industry – 14.6%
  - Education – 10.9%
  - Secretary / clerk / office – 7.0%
  - Professional / technical – 6.1%
- Length of Stay – 4.2 nights
- Average Party Spending – $1,237.32
- Rate SPI overall at 4.57 on a 5-point scale

South Padre Island CVB
Visitor Profile

SUMMER Visitor Profile Summary
June 2016 – August, 2017 *n = 519*

- Average age of respondents is 45.3 years old
  - Teens – 1.1%
  - Twenties – 8.8%
  - Thirties – 22.6%
  - Forties – 33.3%
  - Fifties – 20.5%
  - Sixties – 10.3%
  - Seventies – 2.8%
  - Eighties – 0.6%
- Gender of respondents :
  - 75.7% - Female
  - 23.6% - Male
  - 0.4% - Other
  - 0.2% - Prefer not to answer
  - 0.0% - Transgender
- Ethnicity of respondents:
  - White / Caucasian – 58.0%
  - Hispanic or Latino – 34.1%
  - Black or African American – 4.9%
  - Prefer not to answer – 3.4%
  - American Indian or Alaskan Native – 2.6%
  - Asian or Pacific Islander – 1.3%
- Life Stage:
  - Full-time employed (working outside the home/self employed) – 62.6%
  - Stay-at-home – 12.1%
  - Retired – 7.9%
  - Semi-retired – 3.2%
  - Full-time employed (working remotely from home) – 5.3%
  - Part-time employed – 3.6%
  - Student – 3.0%
  - Other – 2.3%
- Occupation:
  - Healthcare Industry – 15.0%
  - Education – 13.6%
  - Homemaker/stay-at-home parent – 8.4%
  - Executive / manager – 7.9%
  - Professional / technical – 7.5%
- Length of Stay – 4.3 nights
- Average Party Spending – $1,887.85
- Rate SPI overall at 4.66 on a 5-point scale

South Padre Island CVB
Visitor Profile

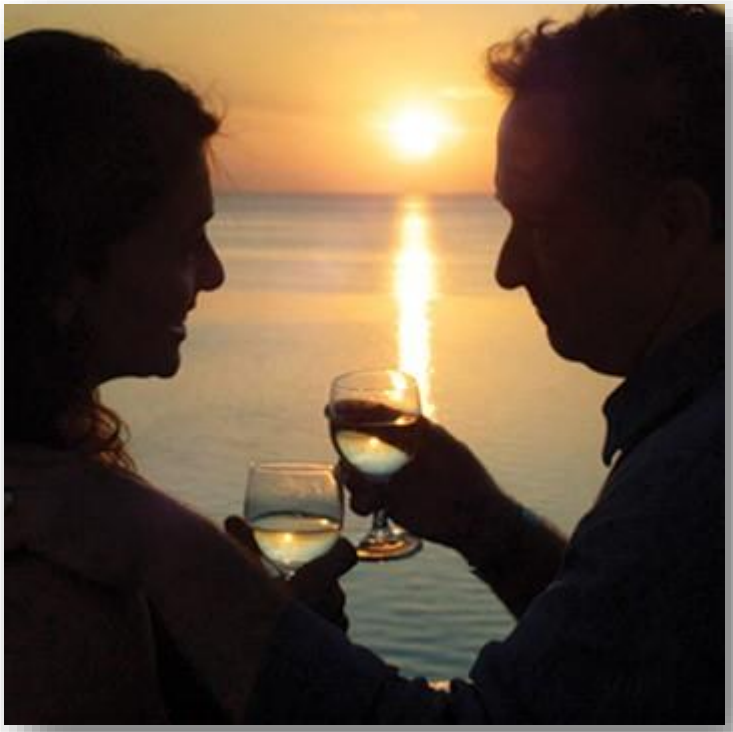
FALL Visitor Profile Summary
September 2016 – November, 2017 *n = 232*

- Average age of respondents is 52.5 years old
  - Teens – 0.0%
  - Twenties – 2.8%
  - Thirties – 15.4%
  - Forties – 19.2%
  - Fifties – 29.4%
  - Sixties – 26.6%
  - Seventies – 5.6%
  - Eighties – 0.9%
- Gender of respondents :
  - 69.8% - Female
  - 27.9% - Male
  - 2.3% - Prefer not to answer
  - 0.0% - Other
  - 0.0% - Transgender
- Ethnicity of respondents:
  - White / Caucasian – 71.6%
  - Hispanic or Latino – 20.0%
  - Prefer not to answer – 5.6%
  - Asian or Pacific Islander – 3.7%
  - American Indian or Alaskan Native – 2.8%
  - Black or African American – 2.8%
- Life Stage:
  - Full-time employed (working outside the home/self employed) – 49.1%
  - Retired – 18.2%
  - Semi-retired – 11.2%
  - Stay-at-home – 8.9%
  - Full-time employed (working remotely from home) – 5.1%
  - Part-time employed – 7.5%
  - Student – 0.0%
  - Other – 0.0%
- Occupation:
  - Retired – 15.1%
  - Healthcare Industry – 15.1%
  - Professional / Technical – 11.0%
  - Self-employed – 9.9%
  - Homemaker / stay-at-home parent – 7.5%
- Length of Stay – 4.5 nights
- Average Party Spending – $1,459.38
- Rate SPI overall at 4.62 on a 5-point scale

South Padre Island CVB
Visitor Profile

WINTER SHORT-TERM Visitor Profile Summary
December, 2015 – February, 2018 *n = 221*

- **Average age of respondents is 53.5 years old**
  - **Teens – 0.0%**
  - **Twenties – 5.3%**
  - **Thirties – 13.9%**
  - **Forties – 19.2%**
  - **Fifties – 21.8%**
  - **Sixties – 26.7%**
  - **Seventies – 12.0%**
  - **Eighties – 1.1%**
- **Gender of respondents :**
  - **77.7% - Female**
  - **21.6% - Male**
  - **0.4% - Prefer not to answer**
  - **0.4% - Transgender**
  - **0.0% - Other**
- **Ethnicity of respondents:**
  - **White / Caucasian – 77.2%**
  - **Hispanic or Latino – 20.0%**
  - **Prefer not to answer – 1.9%**
  - **American Indian or Alaskan Native – 1.9%**
  - **Asian or Pacific Islander – 1.1%**
  - **Black or African American – 1.1%**
- **Life Stage:**
  - **Full-time employed (working outside the home/self employed) – 43.5%**
  - **Retired – 31.6%**
  - **Semi-retired – 7.4%**
  - **Stay-at-home – 6.3%**
  - **Part-time employed – 4.8%**
  - **Full-time employed (working remotely from home) – 3.4%**
  - **Other – 1.9%**
  - **Student – 1.1%**
- **Occupation:**
  - **Retired – 22.4%**
  - **Education – 15.4%**
  - **Healthcare Industry – 13.3%**
  - Professional / technical – 5.4%
  - Self-employed – 5.4%
- **Length of Stay – 5.4 nights**
- **Average Party Spending – $1,274.66**
- **Rate SPI overall at 4.64 on a 5-point scale**



WINTER LONG-TERM Visitor Profile Summary
December, 2015 – February, 2018 *n = 170*

- Average age of respondents is 66.0 years old
  - Teens – 0.0%
  - Twenties – 0.0%
  - Thirties – 0.6%
  - Forties – 0.6%
  - Fifties – 8.4%
  - Sixties – 60.6%
  - Seventies – 28.4%
  - Eighties – 1.3%
- Gender of respondents :
  - 62.8% - Female
  - 35.9% - Male
  - 1.3% - Prefer not to answer
  - 0.0% - Transgender
  - 0.0% - Other
- Ethnicity of respondents:
  - White / Caucasian – 93.0%
  - Prefer not to answer – 6.4%
  - American Indian/Alaskan Native – 1.9%
  - Asian or Pacific Islander – 0.0%
  - Black or African American – 0.0%
  - Hispanic or Latino – 0.0%
- Life Stage:
  - Retired – 82.1%
  - Semi-retired – 12.8%
  - Part-time employed – 2.6%
  - Full-time employed (working outside the home/self employed) – 1.3%
  - Full-time employed (working remotely from home) – 1.3%
  - Other – 0.6%
  - Stay-at-home – 0.0%
  - Student – 0.0%
- Occupation:
  - Retired – 66.7%
  - Education – 9.9%
  - Healthcare Industry – 4.6%
  - Professional / technical – 3.8%
  - Self-employed – 3.8%
- Length of Stay – 60.6 nights
- Average Party Spending – $5,479.90
- Rate SPI overall at 4.49 on a 5-point scale

Travel PARTY Spending (Total Trip)

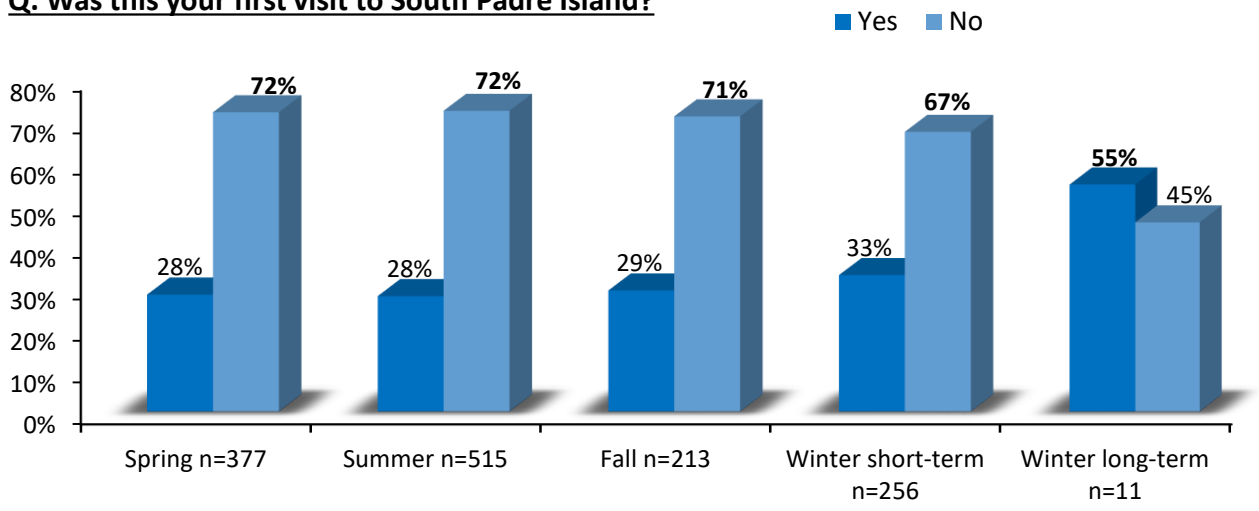
Spending Category	Spring n=371	Summer n=490	Fall n=223	Winter Short-term n=217	Winter Long-term n=158
Lodging	$772.25	$1,050.88	$756.65	$733.15	$3,391.05
(% of reporting)	(68.8%)	(79.6%)	(78.4%)	(77.4%)	(88.8%)
Dining/Food	$340.85	$409.04	$412.16	$348.87	$1,381.23
(% of reporting)	(65.0%)	(90.0%)	(92.2%)	(90.0%)	(83.5%)
Shopping	$178.18	$204.31	$186.80	$178.84	$396.71
(% of reporting)	(68.6%)	(75.5%)	(72.8%)	(74.2%)	(75.9%)
Attractions	$163.05	$264.85	$177.39	$167.00	$254.81
(% of reporting)	(65.5%)	(73.0%)	(59.9%)	(61.1%)	(68.8%)
Local Transportation	$98.45	$101.50	$84.98	$70.37	$211.29
(% of reporting)	(31.2%)	(34.9%)	(34.9%)	(30.8%)	(48.2%)
Bars	$177.76	$171.25	$167.27	$177.66	$462.24
(% of reporting)	(42.0%)	(32.2%)	(41.8%)	(45.2%)	(61.8%)
Other	$219.77	$229.80	$137.52	$185.96	$392.05
(% of reporting)	(10.6%)	(9.6%)	(11.6%)	(11.8%)	(12.9%)
Average Total Spending Per Travel Party	**$1,237.32***	**$1,887.85***	**$1,459.38***	**$1,274.66***	**$5,479.90***
(% of reporting)	**(92.8%)**	**(93.6%)**	**(94.4%)**	**(95.5%)**	**(91.2%)**
Average total # in Travel Party	***3.5***	***5.4***	***3.5***	***3.2***	***2.2***
Average Length of Stay	***4.2 nights***	***4.3 nights***	***4.5 nights***	***5.4 nights***	***60.6 nights***

***Note:** The spending categories will not add up to the average spending reported in the table on this page. The categories in the table are averaged individually. Whereas the overall total is a weighted average that takes into account the fact many travel parties did not report spending in all of the categories.

Travel Behavior Characteristics

Observations: At least one-fourth of leisure respondents in every season indicate this was their first time visiting South Padre Island, with winter having the highest incidence of first-time visitor respondents. One-third first time respondents is healthy and shows the destination appeals to both repeat visitors (high satisfaction drives repeat visitation) and first-time visitors who have been inspired by advertising or referrals from repeat visitors. The table at the bottom of the page reveals the majority of those repeat visitors have been coming to SPI for 10 or more years with a healthy ratio of newer visitors who have been coming for ten years or less.

Q. Was this your first visit to South Padre Island?



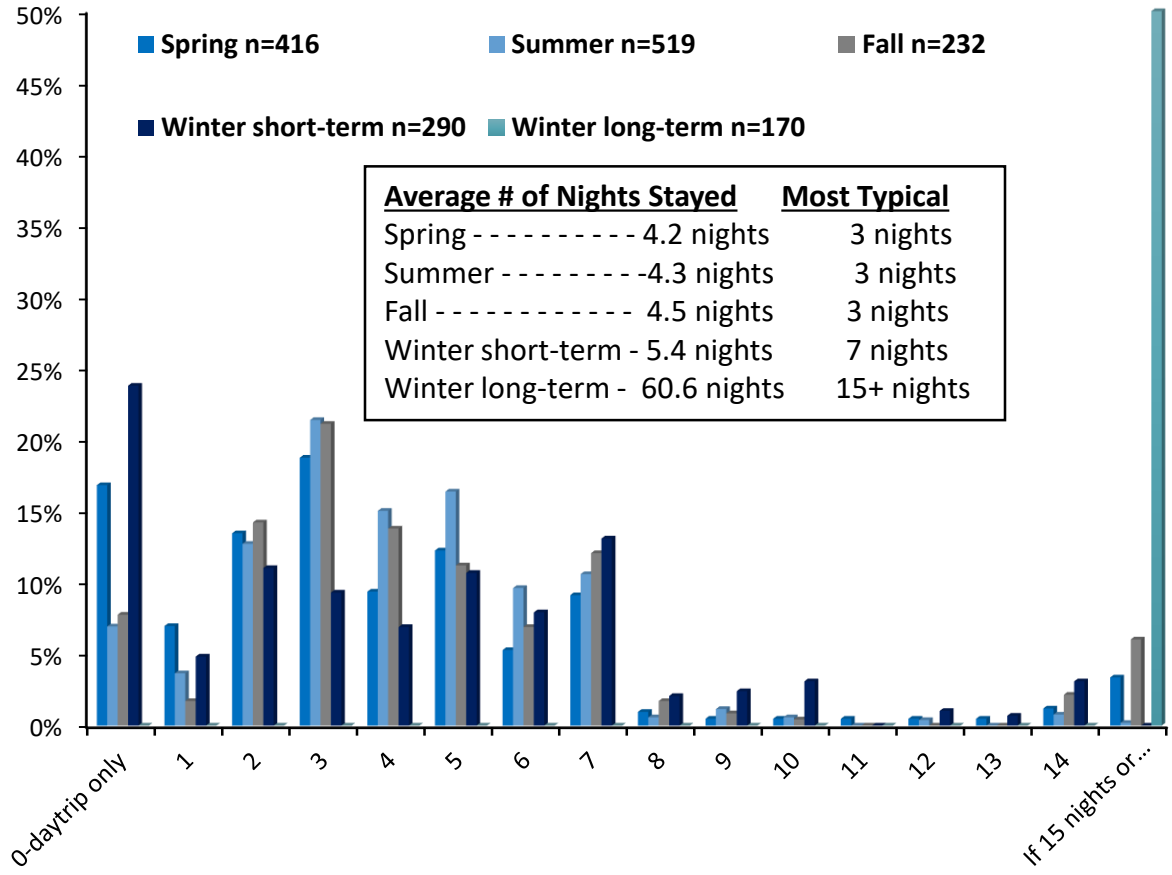
Q. How many years have you been coming to South Padre Island?

# of years coming to SPI	First time	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20+
Spring n=300	1.0%	11.7%	6.3%	7.3%	5.0%	5.0%	3.0%	1.3%	2.0%	6.0%	1.7%	1.7%	0.7%	0.0%	4.7%	0.7%	1.0%	1.3%	0.0%	**39.7%**
Summer n=376	1.3%	6.7%	**10.6%**	6.7%	8.5%	2.4%	3.2%	3.2%	1.1%	7.5%	1.6%	1.9%	0.8%	1.1%	6.7%	0.8%	0.8%	1.9%	1.1%	**32.5%**
Fall n=170	1.8%	9.4%	**10.0%**	5.9%	7.7%	3.5%	2.9%	1.2%	1.8%	8.2%	1.2%	1.2%	1.8%	0.6%	2.4%	0.6%	0.0%	1.2%	0.0%	**38.8%**
Winter short-term n=206	3.4%	**15.1%**	**10.2%**	9.2%	4.9%	2.4%	1.9%	3.9%	0.5%	6.8%	0.0%	1.0%	0.5%	2.4%	3.9%	0.5%	0.5%	0.5%	0.5%	**32.0%**
Winter long-term n=164	**20.7%**	**17.1%**	**17.7%**	**11.6%**	4.9%	3.7%	1.8%	1.8%	0.6%	3.7%	0.6%	4.9%	0.0%	1.2%	3.1%	1.2%	0.0%	0.0%	0.6%	4.9%

Average Length of Stay

Observations: The data herein confirms the shorter length of stay trend reported by hotel and vacation rental managers in the lodging survey. This data is reflective of a national trend toward an increasing number of short getaways throughout the year as opposed to one or two longer vacations. Typically, American traveling households are prone to take 3-5 short getaways and one long vacation annually.

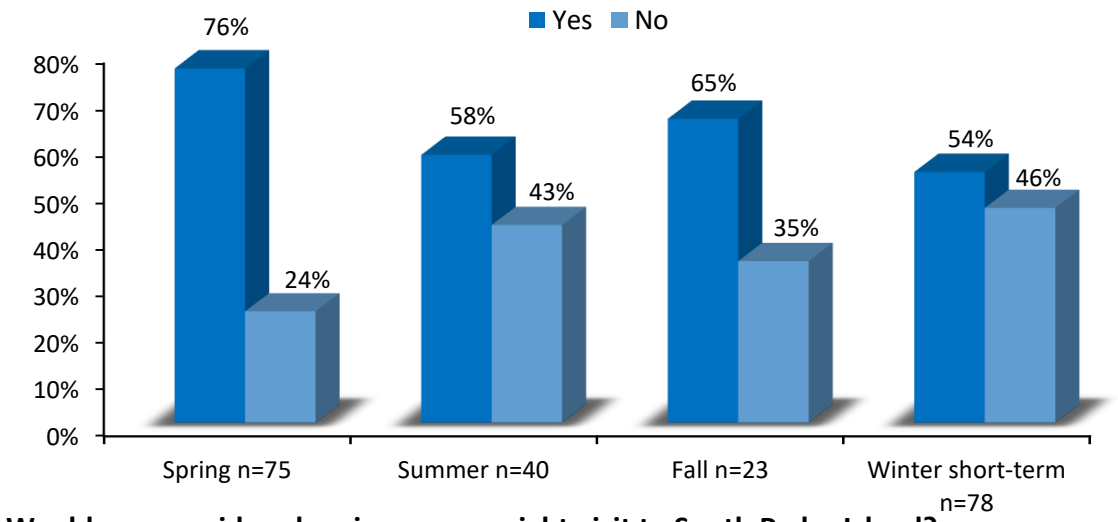
Q. How many nights did you stay in South Padre Island on your most recent visit?



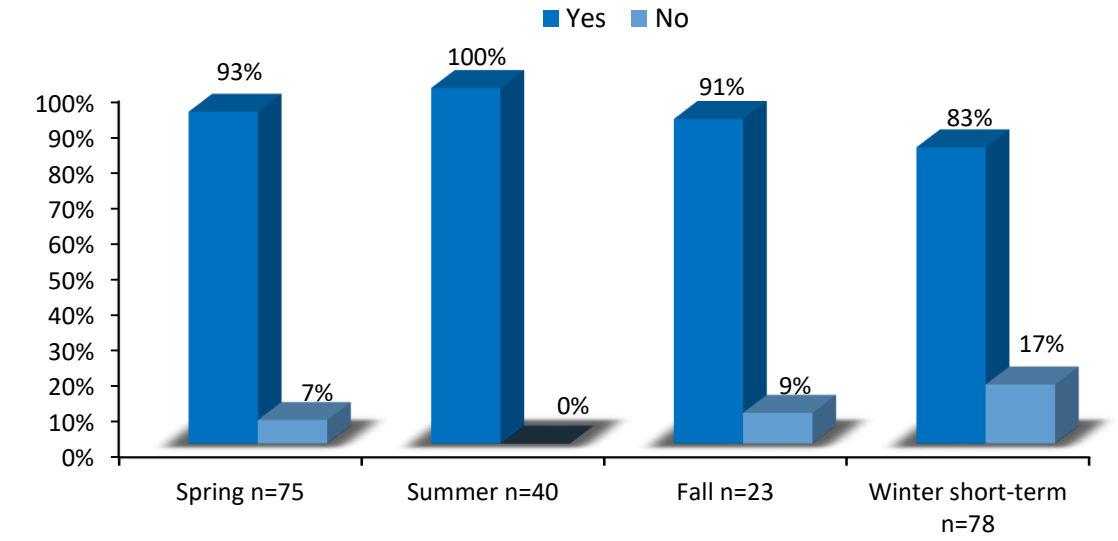
Response Category	Spring n=416	Summer n=519	Fall n=232	Winter short-term n=290	Winter long-term n=170
0-daytrip only	**16.8%**	6.9%	7.8%	**23.8%**	0.0%
1	7.0%	3.7%	1.7%	4.8%	0.0%
2	**13.5%**	12.7%	**14.2%**	**11.0%**	0.0%
3	**18.8%**	**21.4%**	**21.1%**	9.3%	0.0%
4	9.4%	**15.0%**	**13.8%**	6.9%	0.0%
5	12.3%	**16.4%**	11.2%	10.7%	0.0%
6	5.3%	9.6%	6.9%	7.9%	0.0%
7	9.1%	10.6%	12.1%	**13.1%**	0.0%
8	1.0%	0.6%	1.7%	2.1%	0.0%
9	0.5%	1.2%	0.9%	2.4%	0.0%
10	0.5%	0.6%	0.4%	3.1%	0.0%
11	0.5%	0.0%	0.0%	0.0%	0.0%
12	0.5%	0.4%	0.0%	1.0%	0.0%
13	0.5%	0.0%	0.0%	0.7%	0.0%
14	1.2%	0.8%	2.2%	3.1%	0.0%
15+	3.4%	0.2%	6.0%	0.0%	**100.0%**

Daytrip Visitors

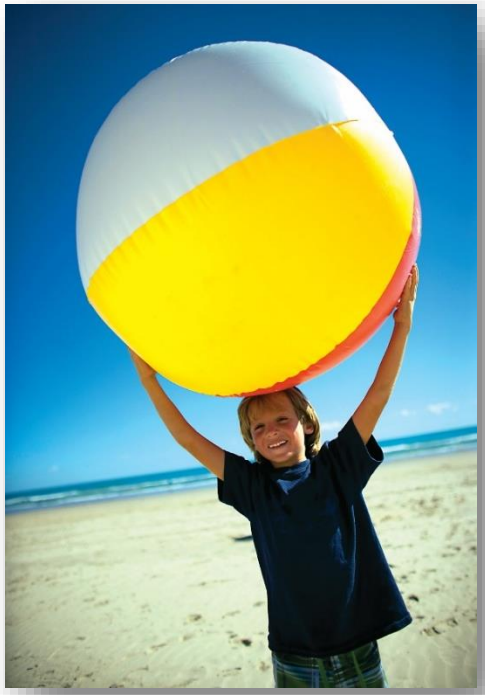
Have you ever stayed overnight in South Padre Island?



Would you consider planning an overnight visit to South Padre Island?



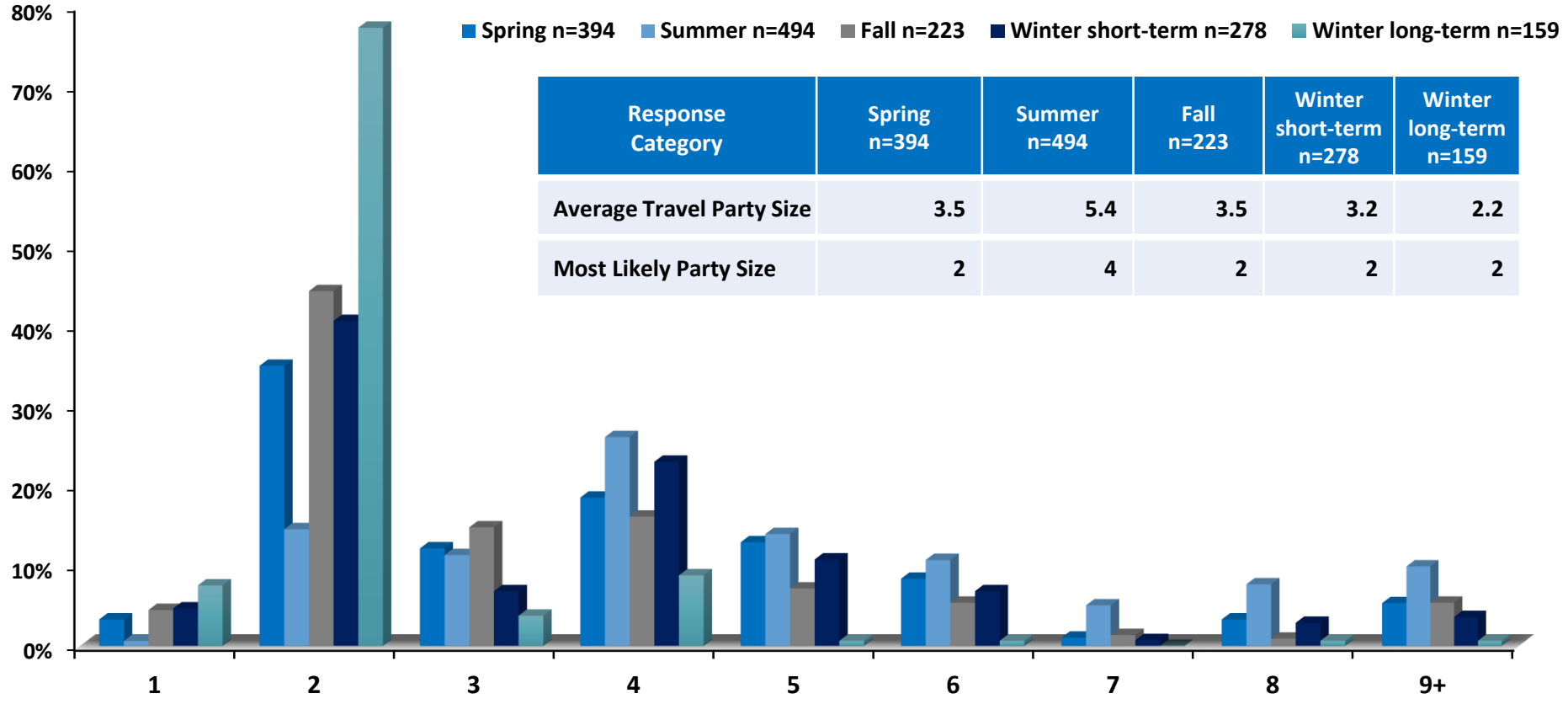
Observations:
Those 216 visitors who reported visiting SPI for a day-trip were asked if they had ever been to SPI for an overnight visit with the vast majority reporting they had stayed overnight previously in SPI and would plan an overnight in the future.



Travel Party Size

Observations: The typical travel party to South Padre Island includes three people with the highest travel party size in summer (5 or more) and the smallest among long-term winter travel parties that are typically comprised of two people. Travel party composition is confirmed in the data set on the next page whereby most travel parties are comprised of one adult couple who are most often accompanied by children or additional adults. The chart below reveals the larger summer parties are most likely to include four to five people while the other seasons are most likely to have two.

Q. What was the total number of people in your travel party to South Padre Island?

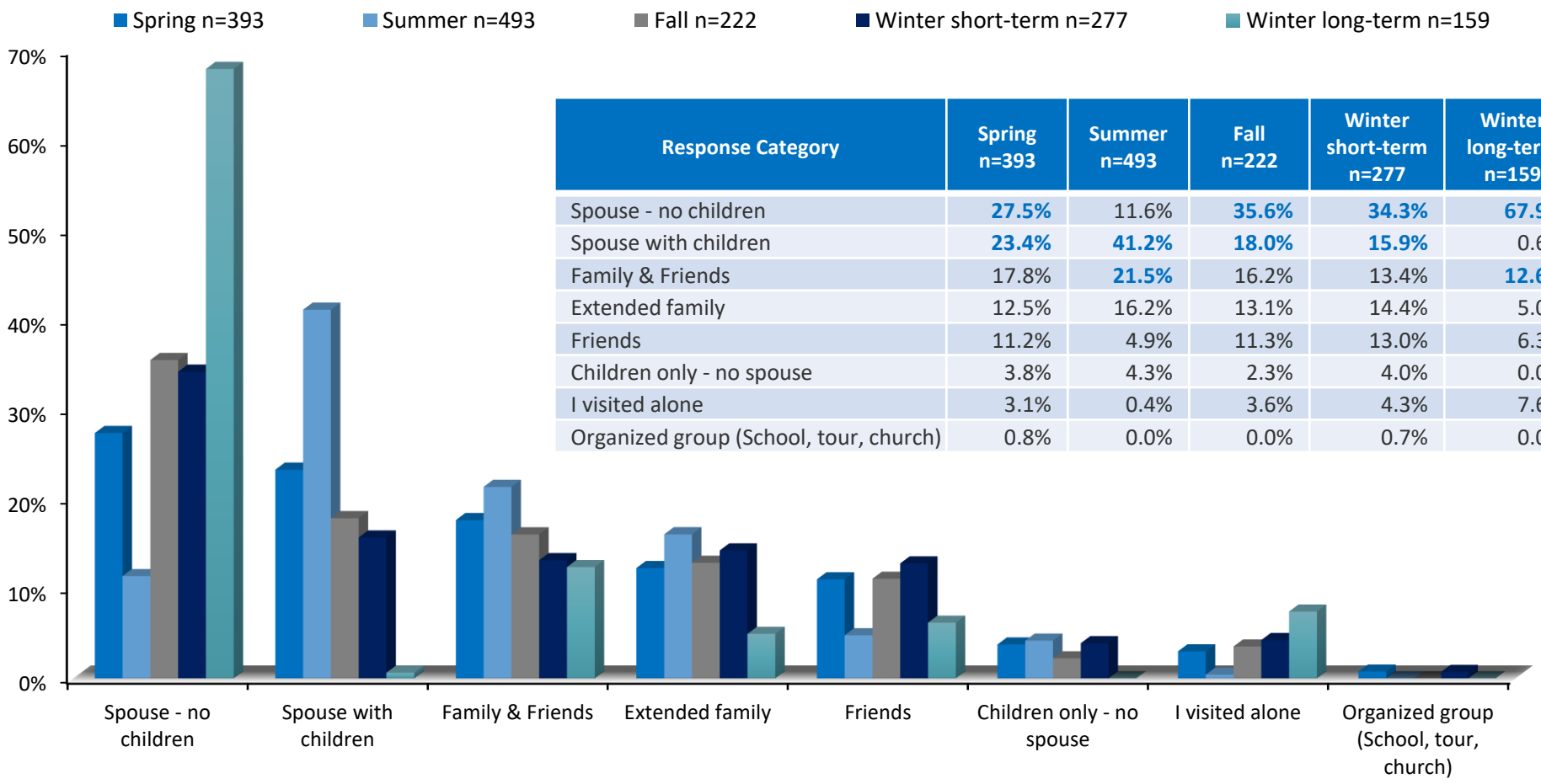


Response Category	Spring n=394	Summer n=494	Fall n=223	Winter short-term n=278	Winter long-term n=159
Average Travel Party Size	3.5	5.4	3.5	3.2	2.2
Most Likely Party Size	2	4	2	2	2

Travel Party Makeup

Observations: The chart and table below reveal that variety of travel party types that come to South Padre island throughout the year. Summer travel parties are least likely to be comprised of one adult couple (11.6%) while more than two-thirds of winter long-term visitors are one couple (67.9%). Very few travel parties to SPI are made up of singles. The vast majority of summer travel parties are comprised of multiple adults traveling with family and friends. Spring and fall visitors are most likely to be couples with or without children and friends.

Q. Which of the following best describes the people who came with you on this visit to South Padre Island?

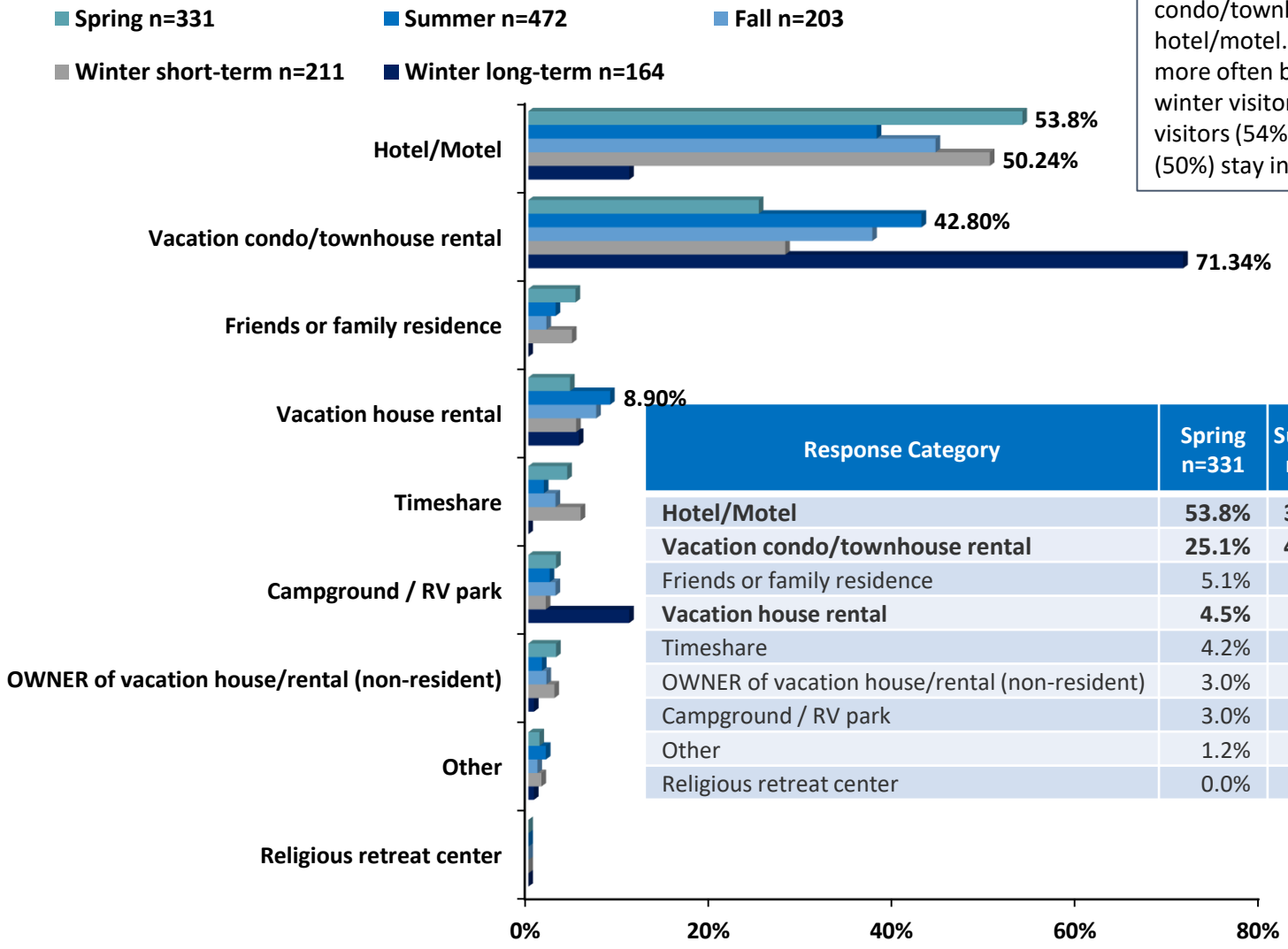


Response Category	Spring n=393	Summer n=493	Fall n=222	Winter short-term n=277	Winter long-term n=159
Spouse - no children	**27.5%**	11.6%	**35.6%**	**34.3%**	**67.9%**
Spouse with children	**23.4%**	**41.2%**	**18.0%**	**15.9%**	0.6%
Family & Friends	17.8%	**21.5%**	16.2%	13.4%	**12.6%**
Extended family	12.5%	16.2%	13.1%	14.4%	5.0%
Friends	11.2%	4.9%	11.3%	13.0%	6.3%
Children only - no spouse	3.8%	4.3%	2.3%	4.0%	0.0%
I visited alone	3.1%	0.4%	3.6%	4.3%	7.6%
Organized group (School, tour, church)	0.8%	0.0%	0.0%	0.7%	0.0%

Travel Party Lodging

Q. How would you categorize the place that you stayed during your most recent visit?

Observations: The most typical accommodations preferred by short-term visitors are vacation condo/townhouse rental followed by hotel/motel. Vacation rentals are preferred more often by summer(52%) and long-term winter visitors (77%) while a majority of spring visitors (54%) and winter short-term visitors (50%) stay in hotels.

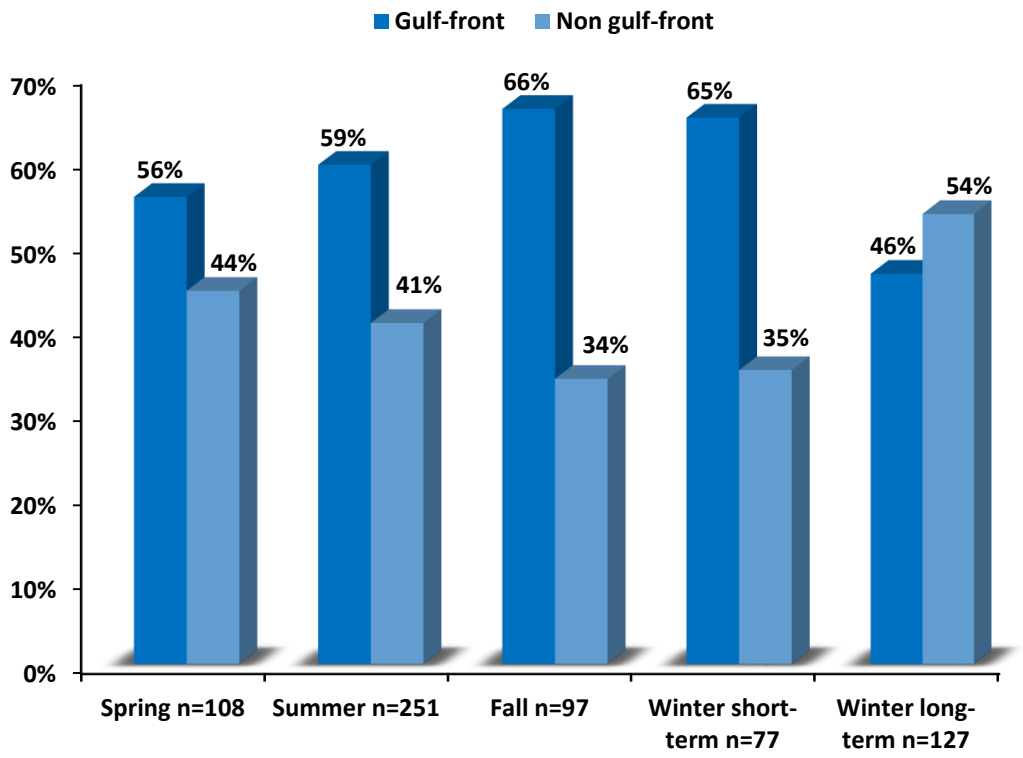


Response Category	Spring n=331	Summer n=472	Fall n=203	Winter short-term n=211	Winter long-term n=164
Hotel/Motel	**53.8%**	**37.9%**	**44.3%**	**50.2%**	11.0%
Vacation condo/townhouse rental	**25.1%**	**42.8%**	**37.4%**	**28.0%**	**71.3%**
Friends or family residence	5.1%	3.0%	2.0%	4.7%	0.0%
Vacation house rental	**4.5%**	**8.9%**	**7.4%**	**5.2%**	**5.5%**
Timeshare	4.2%	1.7%	3.0%	5.7%	0.0%
OWNER of vacation house/rental (non-resident)	3.0%	1.5%	2.0%	2.8%	0.6%
Campground / RV park	3.0%	2.3%	3.0%	1.9%	11.0%
Other	1.2%	1.9%	1.0%	1.4%	0.6%
Religious retreat center	0.0%	0.0%	0.0%	0.0%	0.0%

Location of Vacation Rental Property Accommodations

Q. Please tell us the type of vacation rental property that your party stayed in:

Observations: Gulf-front condos are the most popular vacation rental property type across all seasons with the exception of winter long-term visitors.

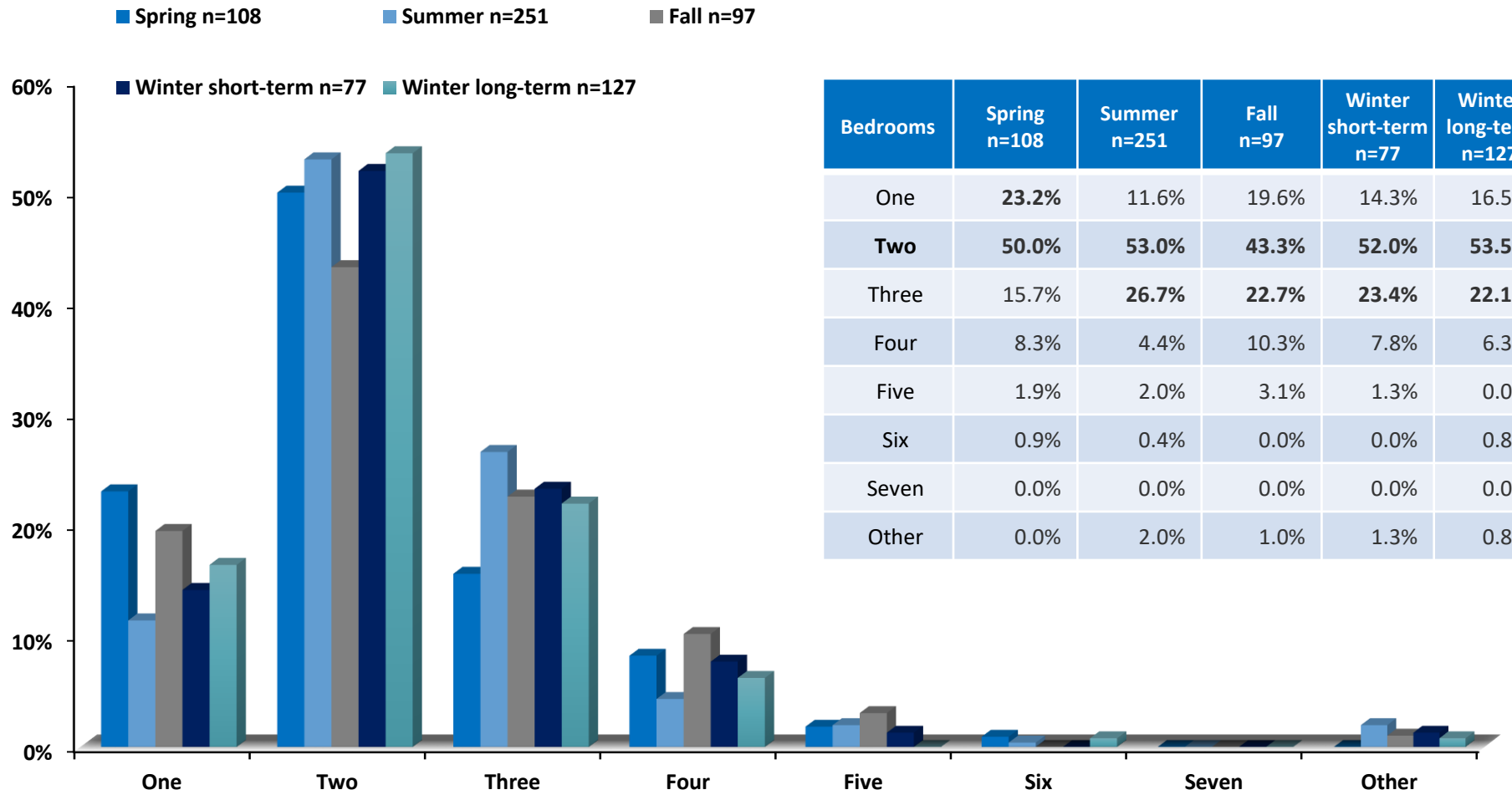


Response Category	Spring n=108	Summer n=251	Fall n=97	Winter short-term n=77	Winter long-term n=127
Gulf-front	55.6%	59.4%	66.0%	64.9%	46.5%
Non gulf-front	44.4%	40.6%	34.0%	35.1%	53.5%

Size of Vacation Rental Property

Observations: The majority of survey respondents who stayed in a vacation rental (non-hotel/motel) reported staying in a two bedroom vacation rental followed by three bedroom rentals. 1-3 bedrooms were in the majority of the rental units where visitors stayed with 2 bedrooms being the most popular choice. This data confirms the travel party size and composition reported in this research.

Q. How many bedrooms were in the rental unit where you stayed?

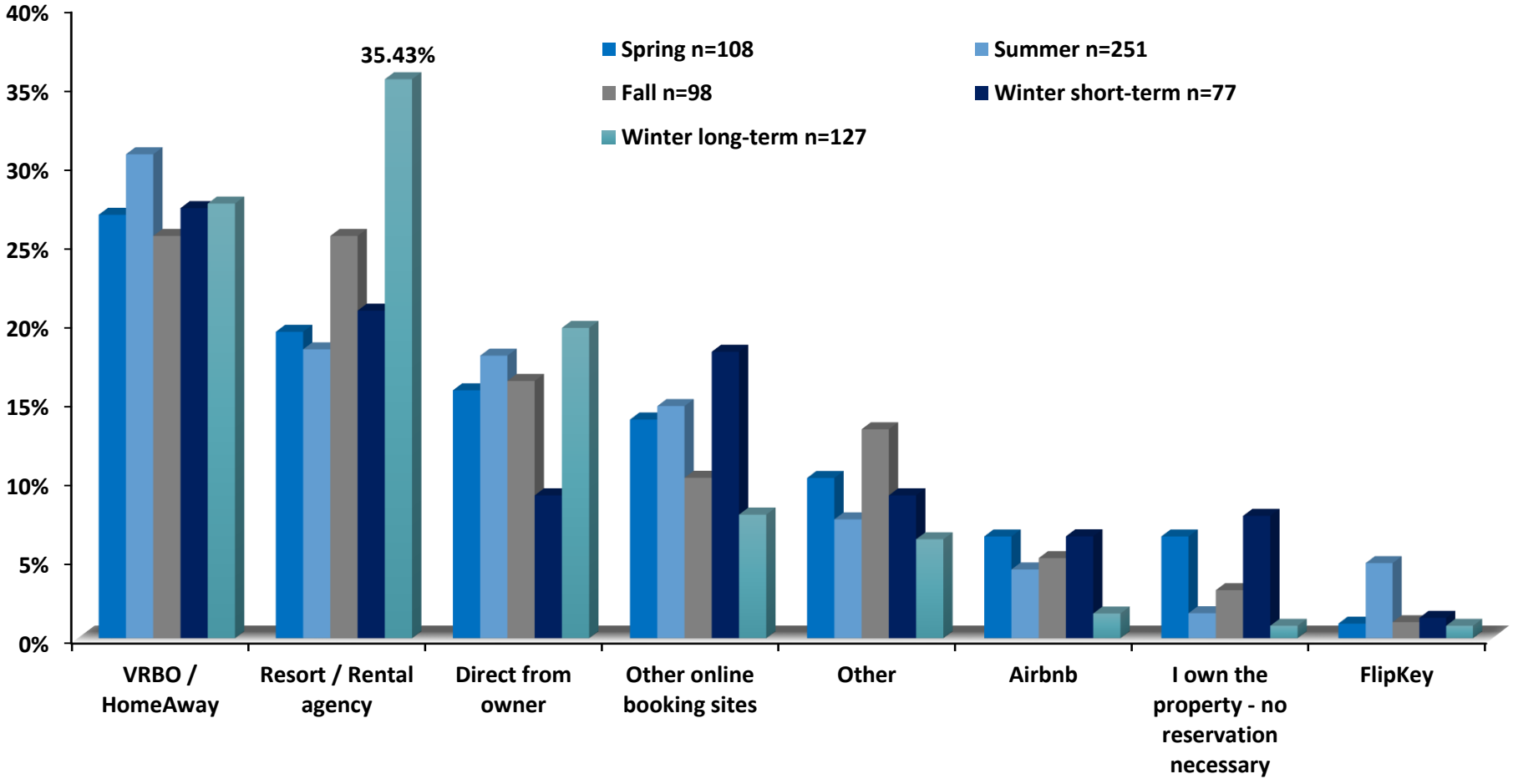


Bedrooms	Spring n=108	Summer n=251	Fall n=97	Winter short-term n=77	Winter long-term n=127
One	**23.2%**	11.6%	19.6%	14.3%	16.5%
Two	**50.0%**	**53.0%**	**43.3%**	**52.0%**	**53.5%**
Three	15.7%	**26.7%**	**22.7%**	**23.4%**	**22.1%**
Four	8.3%	4.4%	10.3%	7.8%	6.3%
Five	1.9%	2.0%	3.1%	1.3%	0.0%
Six	0.9%	0.4%	0.0%	0.0%	0.8%
Seven	0.0%	0.0%	0.0%	0.0%	0.0%
Other	0.0%	2.0%	1.0%	1.3%	0.8%

Booking Method for a Vacation Rental Property

Observations: Respondents in all four seasons indicated the two top rental reservation methods were with VRBO/Home Away or a resort/rental agency. Winter Long-term visitors are more likely to book with resort/rental agencies (35%). It must be noted the vast majority of vacation rental bookings are made with online booking sites other than local vacation rental management agencies. This is of concern in terms of marketing because the destination loses control of providing visitor information prior to arrival and at check-in.

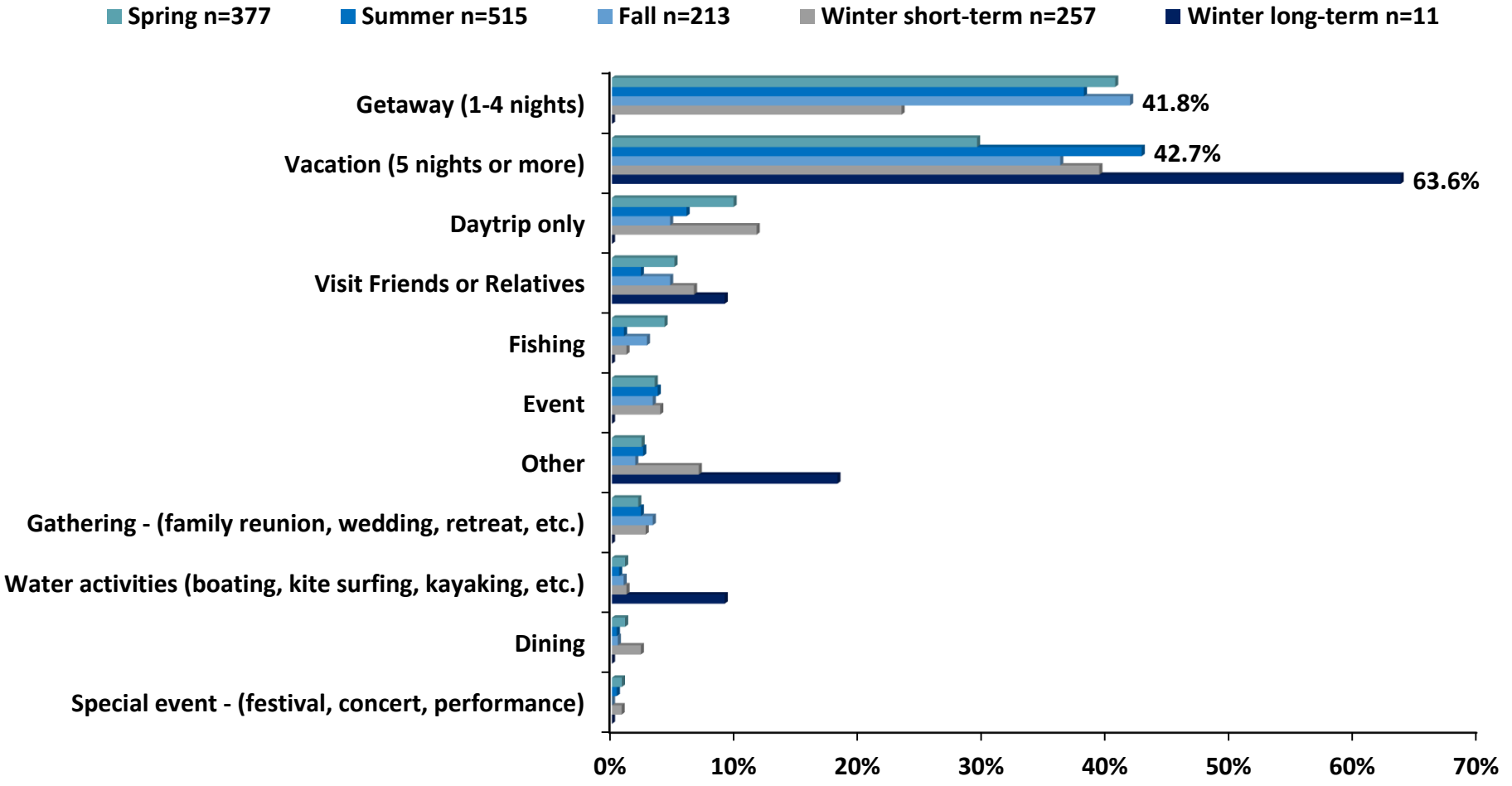
Q. How did you reserve your vacation rental?



Primary Trip Purpose

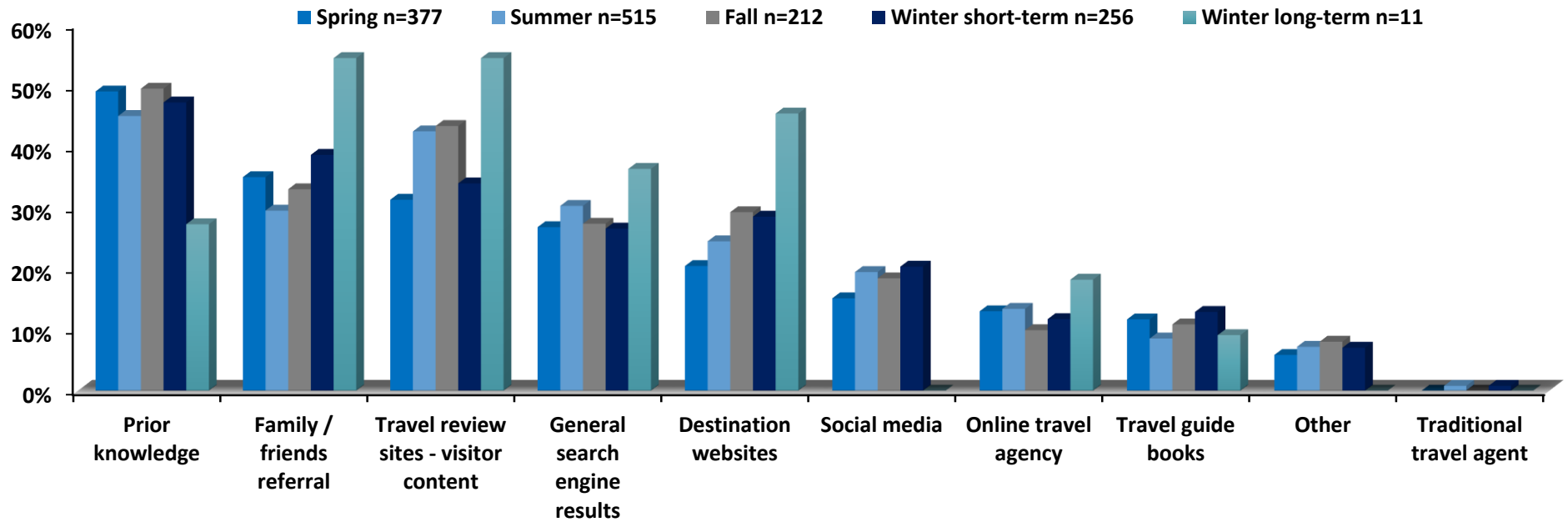
Observations: The responses to this question reveal the trend in American traveling households toward an increasing number of short getaways each year combined with one or two annual vacations. Summer respondents were nearly equally split between getaways and vacations while Spring and Fall visitors were more likely to visit for getaways. Winter visitors are most likely to come for longer stays.

Q. Please identify the PRIMARY motivation for your most recent leisure visit to South Padre Island.



Travel Planning Sources

Q. Please tell us the sources of information you used when planning your visit(s)to South Padre Island.



	Spring n=108	Summer n=251	Fall n=97	Winter short-term n=77	Winter long-term n=127
Prior knowledge	49.1%	45.1%	49.5%	47.3%	27.3%
Family / friends referral	35.0%	29.5%	33.0%	38.7%	54.6%
Travel review sites - visitor content	31.3%	42.5%	43.4%	34.0%	54.6%
General search engine results	26.8%	30.3%	27.4%	26.6%	36.4%
Destination websites	20.4%	24.5%	29.3%	28.5%	45.5%
Social media	15.1%	19.4%	18.4%	20.3%	0.0%
Online travel agency	13.0%	13.4%	9.9%	11.7%	18.2%
Travel guide books	11.7%	8.5%	10.9%	12.9%	9.1%
Other	5.8%	7.2%	8.0%	7.0%	0.0%
Traditional travel agent	0.0%	0.8%	0.0%	0.8%	0.0%

Observations: Repeat visitors are most likely to go on prior knowledge to make plans to visit SPI. All visitors are most likely to use referrals from friends and relatives and look at user-generated content on travel review sites – this is reflective of national travel trends. Online searches and destination websites are also high priority in terms of generating interest in first time visitation.

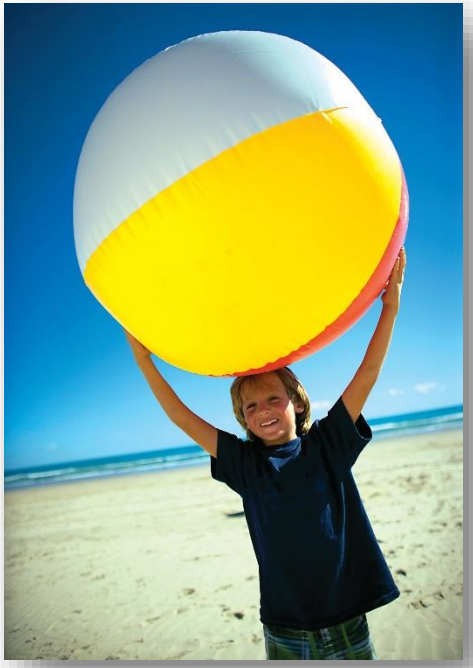
First-time visitors report travel review sites as top planning source.

SPI Attractions & Activities

Q. Which attractions / activities did you or someone in your travel party do while in the South Padre Island area?

Attractions	Spring n=392	Summer n=492	Fall n=222	Winter short-term n=276	Winter long-term n=159
Beach	**93.4%**	**96.1%**	**95.5%**	**90.9%**	**98.1%**
Sea Turtle Center	**54.6%**	**58.5%**	**47.3%**	**58.3%**	**71.1%**
Boat tour- sunset, dolphin, dining cruise, etc.	**33.7%**	**43.3%**	**35.6%**	**30.1%**	**47.2%**
Fishing	**24.2%**	**34.2%**	23.4%	**21.4%**	32.1%
Birding	**20.2%**	12.8%	**24.8%**	**21.4%**	46.5%
Wildlife refuge	19.9%	20.5%	**24.8%**	**24.6%**	38.4%
Waterpark	17.6%	**28.1%**	8.1%	9.8%	5.0%
Nature Trail	17.4%	14.8%	16.2%	18.8%	35.2%
Isla Blanca County Park	16.3%	10.4%	13.1%	19.6%	**53.5%**
Farmer's market	12.5%	9.8%	19.8%	20.3%	**77.4%**
Outlet mall (RGV)	12.5%	12.0%	10.4%	13.4%	23.9%
Museums	12.2%	12.4%	14.4%	15.9%	29.6%
Other	11.2%	11.8%	13.1%	13.8%	13.8%
Gladys Porter Zoo (Brownsville)	8.4%	8.1%	7.2%	9.8%	18.2%
Para-sailing	5.1%	9.2%	3.6%	2.9%	4.4%
Golf course	3.6%	3.5%	4.1%	2.9%	22.0%
Stand up paddleboard / kayaking	2.8%	4.3%	1.8%	1.5%	4.4%
Did NOT do any activities	2.6%	0.6%	3.6%	2.5%	0.6%
Kite surfing	1.3%	1.8%	1.4%	1.5%	6.9%
Skydiving	0.8%	1.6%	0.5%	0.7%	1.9%

Observations: It's all about the beach! Visitors who come to SPI in every season use and experience the beach. Over half of the visitor respondents go to the Sea Turtle Center. Other popular activities include boat tours, fishing, birding, wildlife activities and the water park.



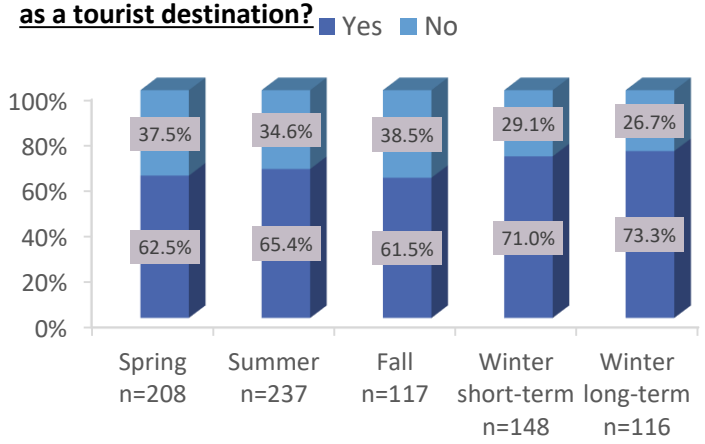
Festivals / Events

Observations: Festivals only occur on a few days out of the 365 year and survey respondents came from all four seasons of the year. Therefore, it is impressive the number of respondents who indicated attendance at a festival and the sandcastles were experience throughout the year. More than 2/3 of visitors said a festival or event enhanced their experience and increased the likelihood of a return visit.

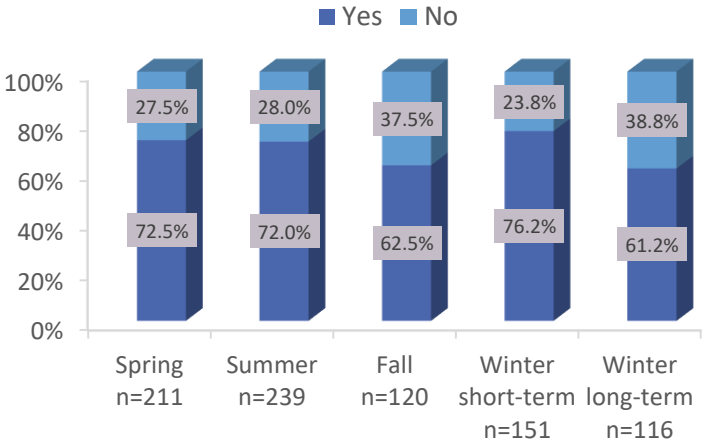
Q. Please tell us which festivals/events you or someone in your travel party attended while in SPI over the last 2 years?

	Spring n=145	Summer n=153	Fall n=90	Winter short-term n=112	Winter long-term n=112
Sandcastle Days	**47.6%**	**39.9%**	**52.2%**	**36.6%**	10.7%
National Fireworks Show (4th of July, Memorial Day, Labor Day, New Year's Eve)	**35.9%**	**48.4%**	**23.3%**	**39.3%**	**14.3%**
Other	**27.6%**	**18.3%**	**31.1%**	**27.7%**	**21.4%**
Fishing Tournament (TIFT, LKT, etc.)	11.7%	7.8%	1.1%	6.3%	0.9%
SPI Fishing Days	9.7%	5.2%	0.0%	1.8%	3.6%
Splash South Padre	9.0%	9.2%	5.6%	2.7%	1.8%
SPI Kitefest	8.3%	4.6%	7.8%	**27.7%**	**79.5%**
Spring Break Jam Carshow	7.6%	4.6%	0.0%	0.9%	5.4%
SPI Marathon (or other race)	4.8%	2.6%	6.7%	7.1%	11.6%
Walk for Women	3.5%	4.6%	5.6%	7.1%	9.8%
SPI Film Festival	2.8%	1.3%	1.1%	1.8%	0.9%

Did attending this event(s) enhance your perception of SPI as a tourist destination?

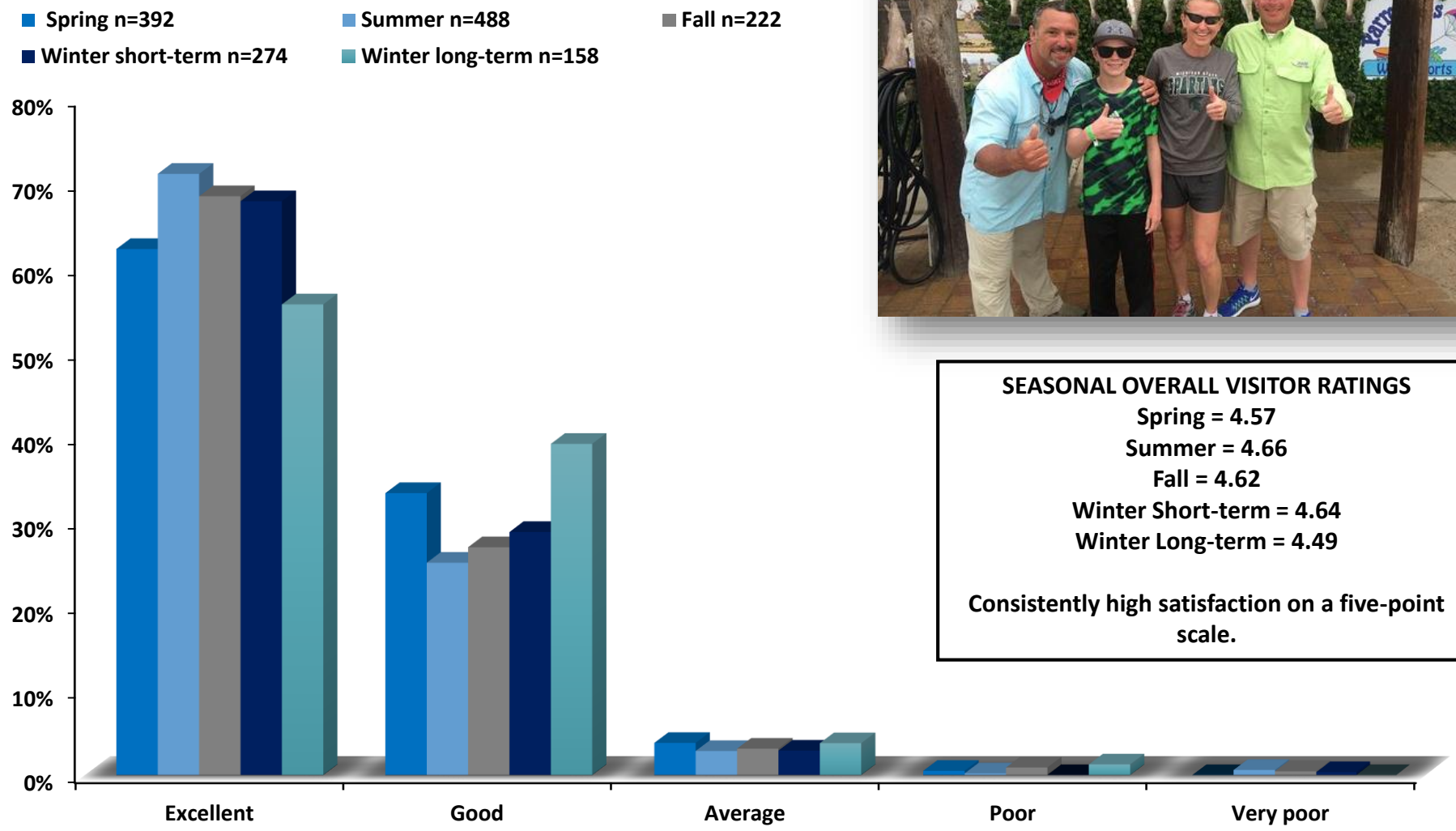


Did attending this event(s) enhance the likelihood of you returning to SPI for another vacation?



Overall SPI Visitor Satisfaction Ratings

Observations: the satisfaction ratings are at 4.5 or higher on a five point scale in every season of the year. These are very high ratings and indicate high satisfaction with the travel experience to South Padre Island.



SEASONAL OVERALL VISITOR RATINGS
Spring = 4.57
Summer = 4.66
Fall = 4.62
Winter Short-term = 4.64
Winter Long-term = 4.49

Consistently high satisfaction on a five-point scale.

SPI Visitor Amenities Satisfaction Rating

Observations: Respondents were asked to rate a list of twelve SPI attributes on a scale of one to five where one is low and five is high**.** Visitors from all four seasons consistently rated the amenities offered in SPI high; most averages reported at a 4.0 or higher. Areas identified for improvement are those that dip below 4.0 on a five point scale and are identified in red font in table below. Visitors from peak travel seasons reported traffic as an issue. The variety of shopping and merchandise rated lowest in all seasons and this is not a good trend as shopping is one of the biggest categories of discretionary spending. Finally, variety of children activities rated low in every season, even in summer when the most children are present.

Q. Following is a list of amenities offered in South Padre Island. Considering this visit, please rate each amenity on a on a 5 point scale (1 is poor, 3 is average and 5 is excellent).

Amenity	Spring n=392	Summer n=488	Fall n=221	Winter short-term n=274	Winter long-term n=158
Overall appeal of the attractions in the area	4.37	4.46	4.43	4.28	4.16
Quality of beaches	4.37	4.49	4.45	4.42	4.44
Attractiveness/landscaping of the destination	4.36	4.47	4.47	4.4	4.22
Quality of dining out	4.26	4.24	4.28	4.39	4.31
Signage and wayfinding	4.24	4.27	4.2	4.24	4.16
Level of customer service	4.23	4.21	4.18	4.29	4.23
Night life / Evening entertainment	4.13	4.07	4.03	4.1	4
Lodging value you received for the price paid	4.11	4.05	4.2	4.19	4.12
Spring break activities	3.98	n/a	n/a	n/a	n/a
Ease of traffic	3.91	3.89	4.23	4.12	3.97
Variety of children's activities	3.88	4.03	3.84	3.86	3.73
Variety of shopping & merchandise	3.87	3.91	3.8	3.86	3.69

Other Gulf Coast beaches Visited

Observations: The charts at the bottom of this page identify the Gulf Coast beaches that have been visited by survey respondents indicating these as competitive markets. Galveston had the highest visitation rate. Rounding out the top 3 for all segments are Port Aransas and Destin/Sandestin in top 3 of all seasons except spring and winter short term. Gulf Shores and PCB in only winter long term visitors. It is interesting to note that Winter Long-term visitors indicate they visit many other beach destinations on the Gulf. An estimated 96,000 winter Texans visited the Rio Grande Valley between 2015 and 2016, according to University of Texas Rio Grande Valley's 2015-2016 Winter Texan Report conducted by the Business & Tourism Research Center. In 2010, the number of winter Texans was at 100,000 indicating declining numbers of winter Texans in the RGV.

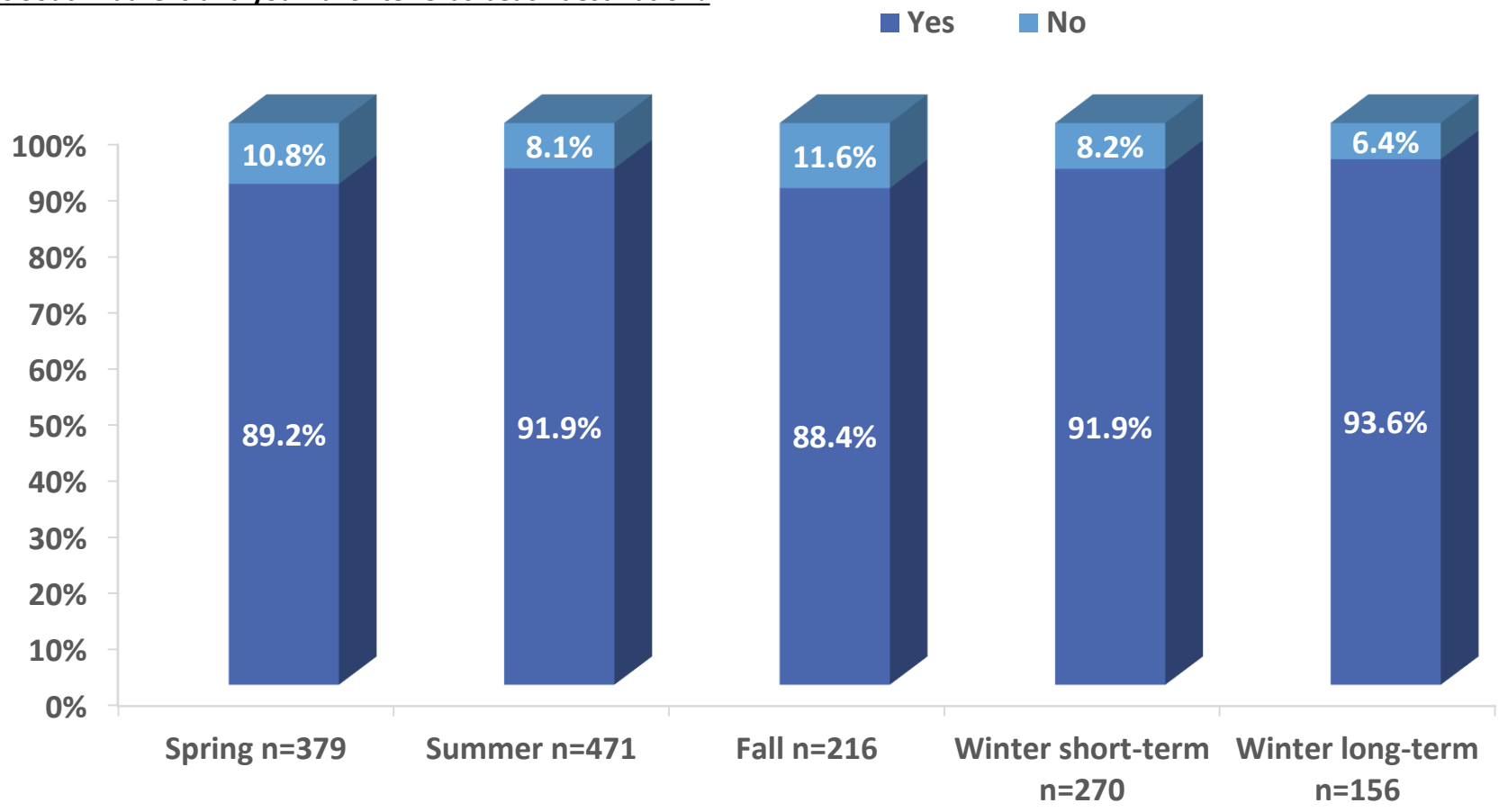
Q. Please indicate the other Gulf Coast beaches where you have taken vacations or getaways.

	Spring n=364	Summer n=457	Fall n=211	Winter short-term n=253	Winter long-term n=154
Galveston Island	**44.8%**	**55.6%**	**51.7%**	**41.1%**	**29.9%**
Do not visit/vacation at other Gulf Coast beaches	**28.9%**	**20.6%**	19.9%	**30.4%**	**21.4%**
Port Aransas Beach	**28.0%**	**42.7%**	**38.4%**	**31.6%**	**23.4%**
Destin / Sandestin	19.8%	**21.0%**	**22.8%**	16.2%	**27.3%**
Rockport Beach	17.3%	**23.0%**	18.5%	19.0%	14.3%
Panama City Beach	16.8%	14.9%	14.7%	13.4%	**28.6%**
Gulf Shores / Alabama	15.7%	14.7%	19.9%	12.3%	**30.5%**
Pensacola	15.1%	15.1%	18.0%	11.5%	**24.7%**
Other Gulf coast beaches	14.0%	12.3%	19.0%	17.4%	**27.9%**
Crystal Beach	7.7%	12.7%	11.9%	5.5%	3.9%
Surfside Beach	7.7%	12.5%	10.0%	4.7%	3.9%
Matagorda Beach	6.0%	6.8%	10.4%	5.9%	5.8%

Favorite Texas Beach Destination

Observations: Survey respondents were asked if South Padre Island is their favorite Texas beach destination. The vast majority of respondents (higher than 88% in all seasons of the year) indicated SPI is their favorite beach destination. This is important and must be compared to the responses in the prior question whereby respondents showed that 1/3 to ½ of respondents also go to Galveston island and Port Aransas Beach. South Padre Island is their favorite beach but the other Texas beaches are closer in proximity to the densely populated East Texas metropolitan areas.

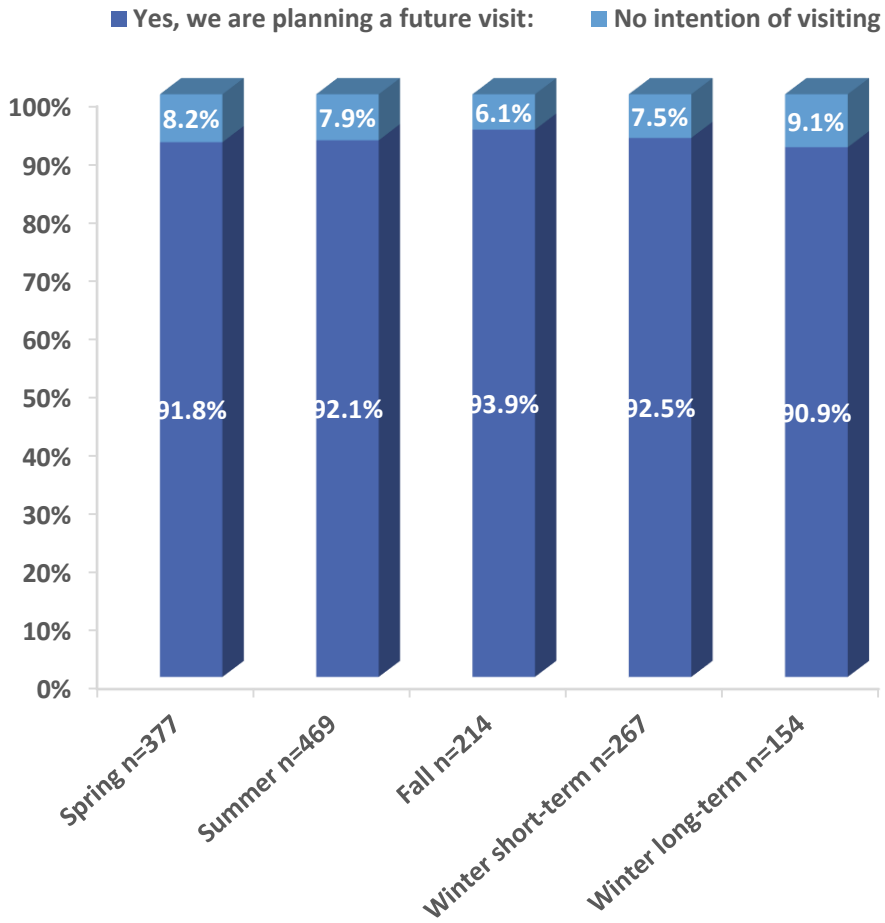
Q. Is South Padre Island your favorite Texas beach destination?



Future Visit / Recommendation

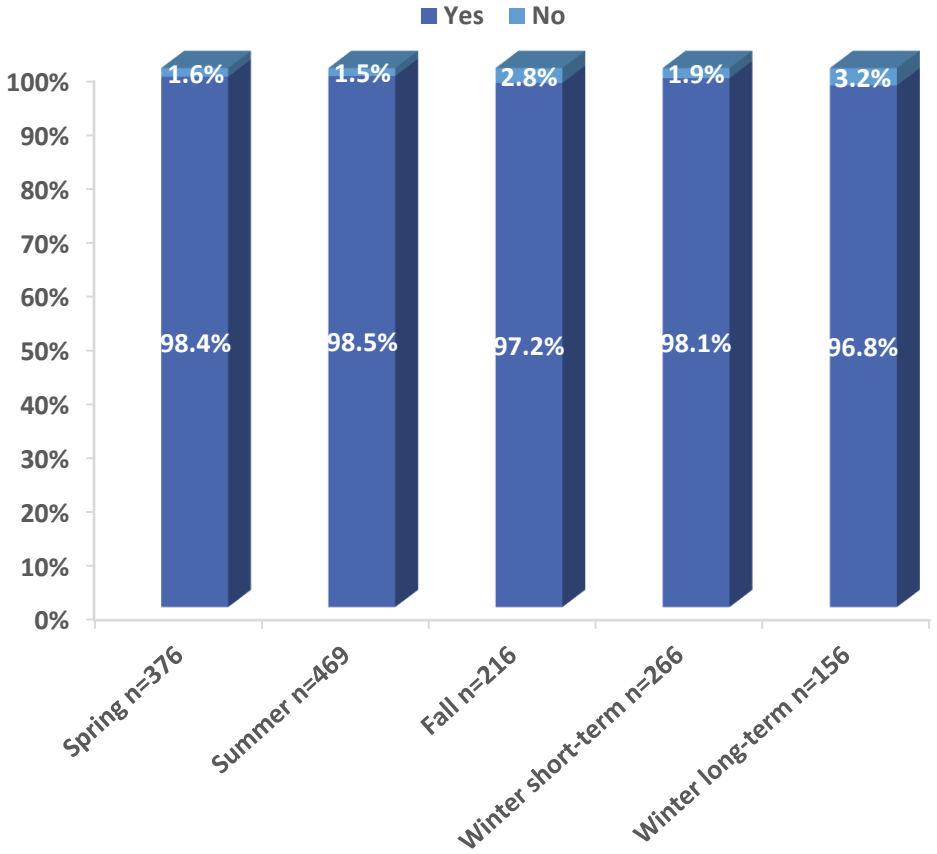
Observations: Only satisfied and loyal visitors plan to return and the response data to this question reveals that nine out of ten respondents plan to return. This is an extremely high affirmation of customer loyalty.

Q. Are you planning a future visit to South Padre Island?



Observations: Nearly ALL survey respondents who had visited South Padre Island would recommend it to others. This is the highest affirmation that we have seen in similar destination research. This must be compared to the awareness/image research found later in this report wherein respondents liked SPI but were not as loyal as repeat SPI visitors.

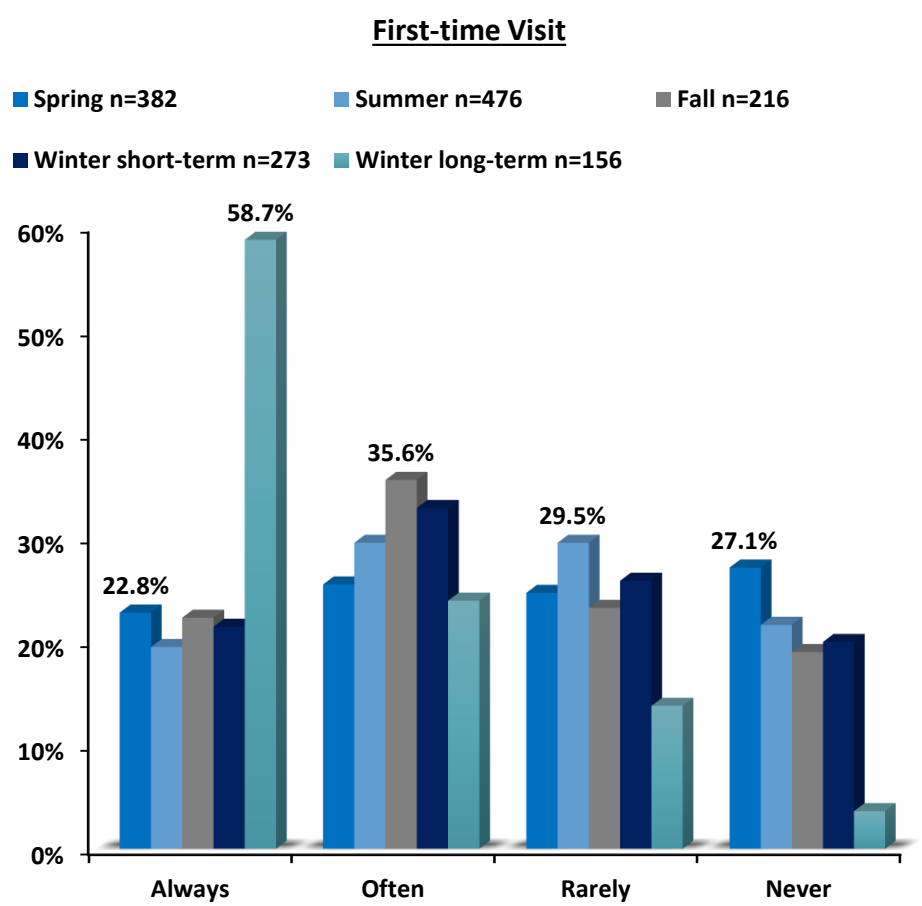
Q. Would you recommend South Padre Island to others?

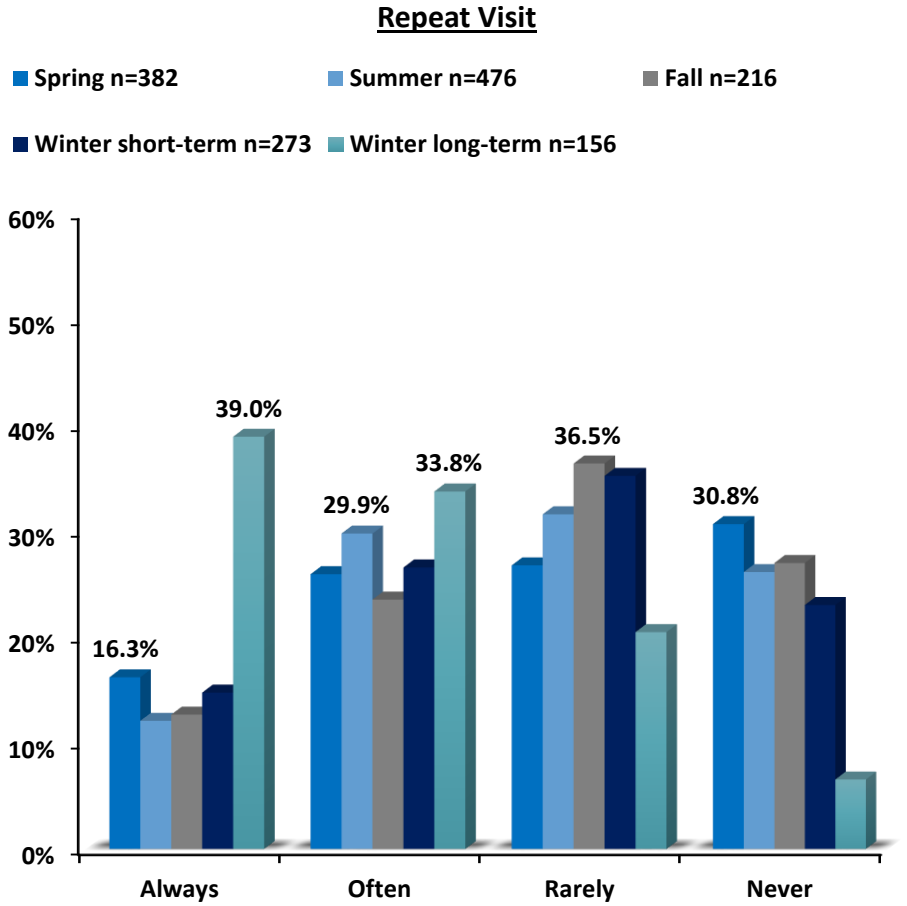


Visitor Center Use

Observations: Respondents were a series of questions about their use of visitor information centers when at a coastal/beach destination. Less than one-fourth of first-time visitors in all seasons (except winter long term -59%) reported always going to a visitor center and less than 1/3 of first-time reported often going to a visitor center. In summary, approximately half of first time visitors are likely to go to an information center while repeat visitors are slightly less likely to go to an information center.

Q. When visiting a coastal/beach destination, how often do you stop at a visitor information center to collect information about things to do and places to eat?

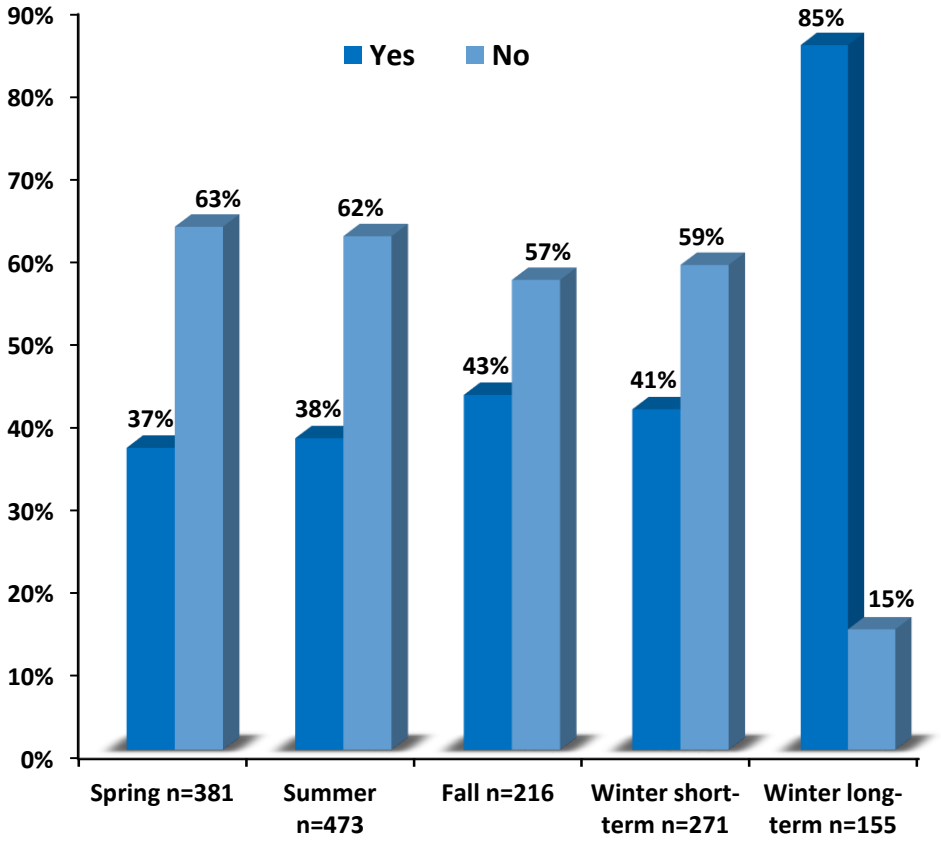




Visitor Center

Observations: The vast majority of winter long-term visitors reported stopping at the SPI visitor center while less than half of visitors in the other seasons stopped in. The information sought most often in the SPI visitor center is related to dining, discounts/ coupons, outdoor activities, family/children's activities and adult nightlife.

Q. Did you stop at a visitor center on South Padre Island?



Q. What type of visitor information did you seek when arriving in SPI?

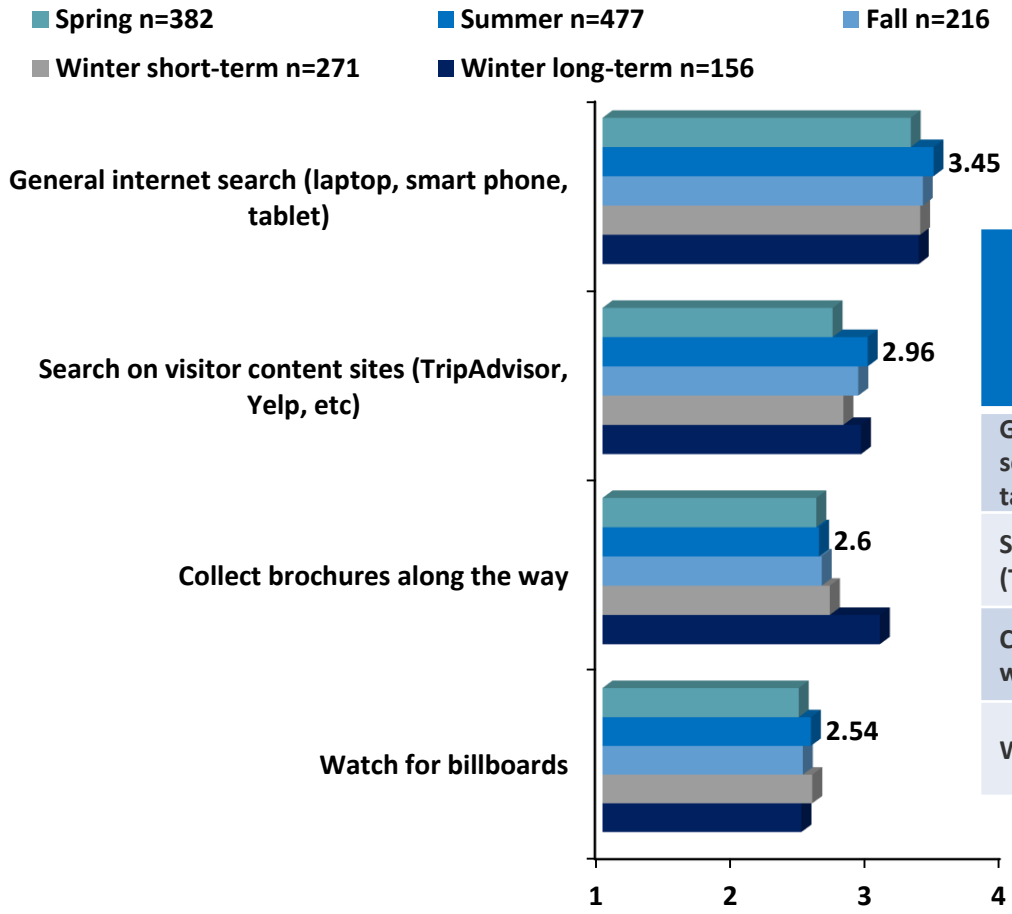
	Spring n=332	Summer n=434	Fall n=191	Winter short-term n=240	Winter long-term n=152
Dining recommendations	**67.5%**	**69.4%**	**80.1%**	**77.1%**	**84.2%**
Discount / coupon books	**51.5%**	**51.2%**	**54.5%**	**55.8%**	**73.0%**
Outdoor activities	**47.6%**	**51.2%**	**53.4%**	**51.3%**	56.6%
Maps	34.3%	33.2%	42.4%	43.3%	**68.4%**
Family / children activities	34.0%	**59.5%**	23.6%	27.9%	7.9%
Adult / nightlife activities	27.1%	21.4%	27.2%	26.3%	35.5%
Lodging recommendations	19.6%	22.1%	17.8%	20.8%	9.2%
Real estate information	11.1%	6.5%	7.9%	11.3%	15.1%
Pet friendly / Pet comfort	10.8%	9.9%	15.7%	11.7%	15.8%
Dining reservations	9.9%	12.2%	7.3%	8.3%	6.6%
Lodging reservations	7.8%	9.9%	5.8%	10.4%	2.0%
Other	6.6%	3.2%	4.7%	3.8%	5.9%

Visitor Center

Observations: Survey respondents were asked how they collect information about things to do and places to eat once they are traveling. The response data shows a consistently strong endorsement for digital search including devices such as smart phones, laptops and tablets. User generated content and rating/review sites such as Trip Advisor and Yelp are most popular.

Q. While traveling to South Padre Island, how did you collect information about things to do and places to eat?

Select an option from the scale: Always (4), Often (3), Rarely (2), Never (1).



	Spring n=382	Summer n=477	Fall n=216	Winter short-term n=271	Winter long-term n=156
General internet search (laptop, smart phone, tablet)	3.28	3.45	3.37	3.35	3.34
Search on visitor content sites (TripAdvisor, Yelp, etc)	2.7	2.96	2.89	2.78	2.91
Collect brochures along the way	2.58	2.6	2.62	2.68	3.05
Watch for billboards	2.45	2.54	2.48	2.55	2.47

Visitor Center

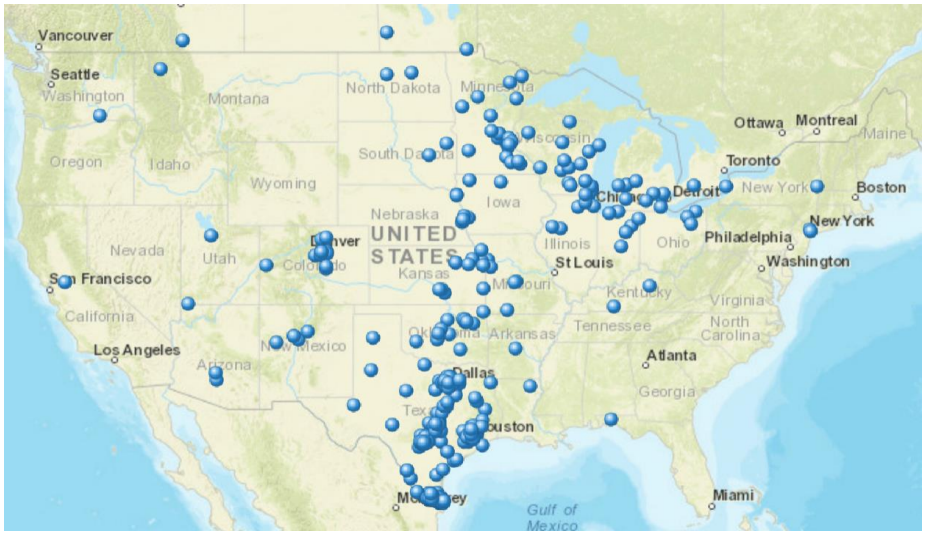
Q. If you stopped at a visitor center on South Padre Island, please rate the following statements using the a 5-point scale, where 5 is excellent, 3 is average and 1 is very poor.

	Spring n=310	Summer n=406	Fall n=175	Winter short-term n=229	Winter long-term n=149
Good first impression of SPI	4.59	4.58	4.67	4.54	4.66
Overall cleanliness of facility	4.53	4.48	4.58	4.55	4.7
Friendliness of information specialist	4.51	4.54	4.45	4.39	4.46
Ease of finding visitor information center	4.49	4.46	4.51	4.42	4.69
Helpfulness of information specialist	4.48	4.45	4.4	4.41	4.45
Quality of information provided	4.46	4.39	4.39	4.42	4.55

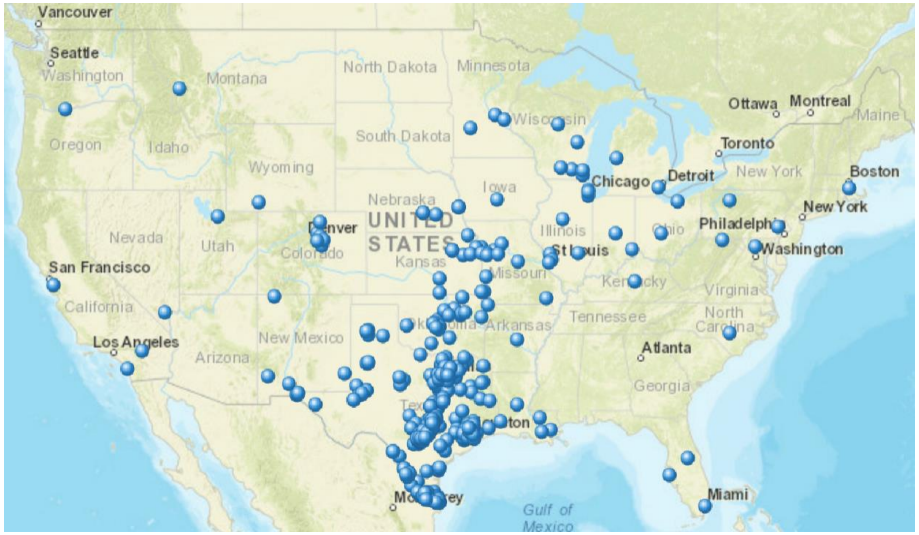
Q. Which of the following concepts would improve the availability and quality of visitor information while in South Padre Island? Tell us your level of agreement using a 5-point scale where 5 is strongly agree, 3 is neutral and 1 is strongly disagree.

	Spring n=334	Summer n=442	Fall n=197	Winter short-term n=245	Winter long-term n=147
Mobile apps	4.13	4.29	4.07	4.09	3.64
Satellite kiosks at SPI attractions or key locations	3.89	3.95	3.8	3.84	3.44
Mobile visitor information center at events	3.86	3.96	3.8	3.8	3.31
Mobile visitor information center at beach	3.85	4.01	3.76	3.73	3.1
Touch screen technology in current visitor center	3.83	3.97	3.85	3.79	3.41

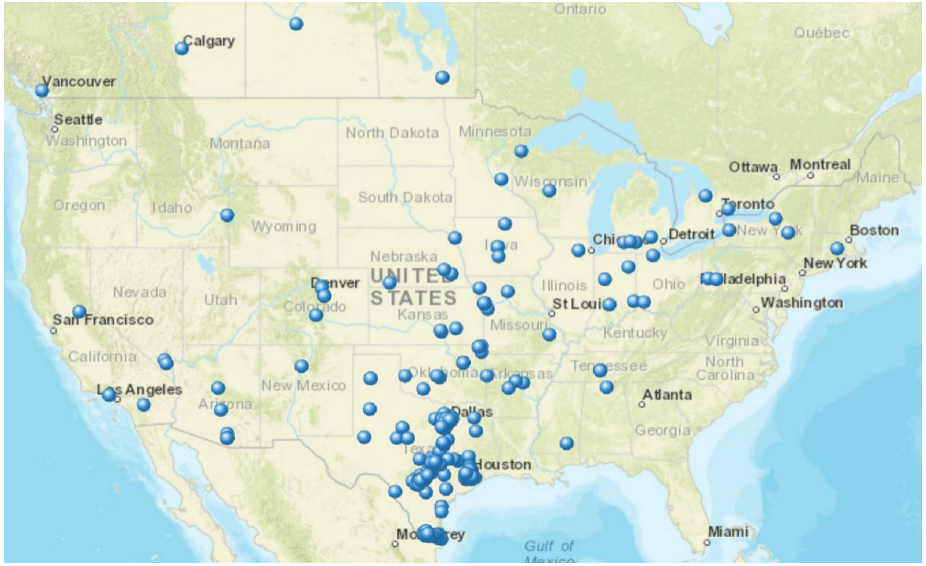
Spring Visitor Survey Respondents Map n=416



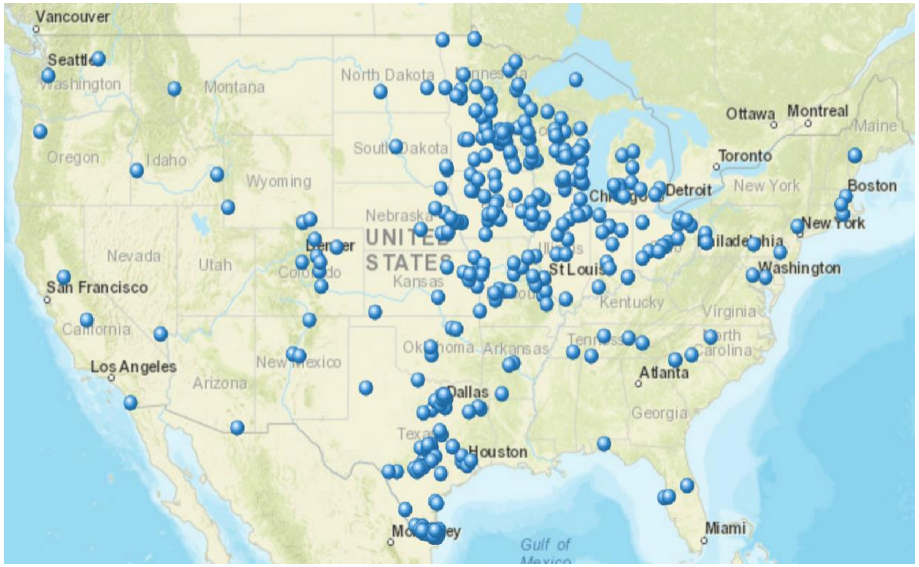
Summer Visitor Survey Respondents Map n=519



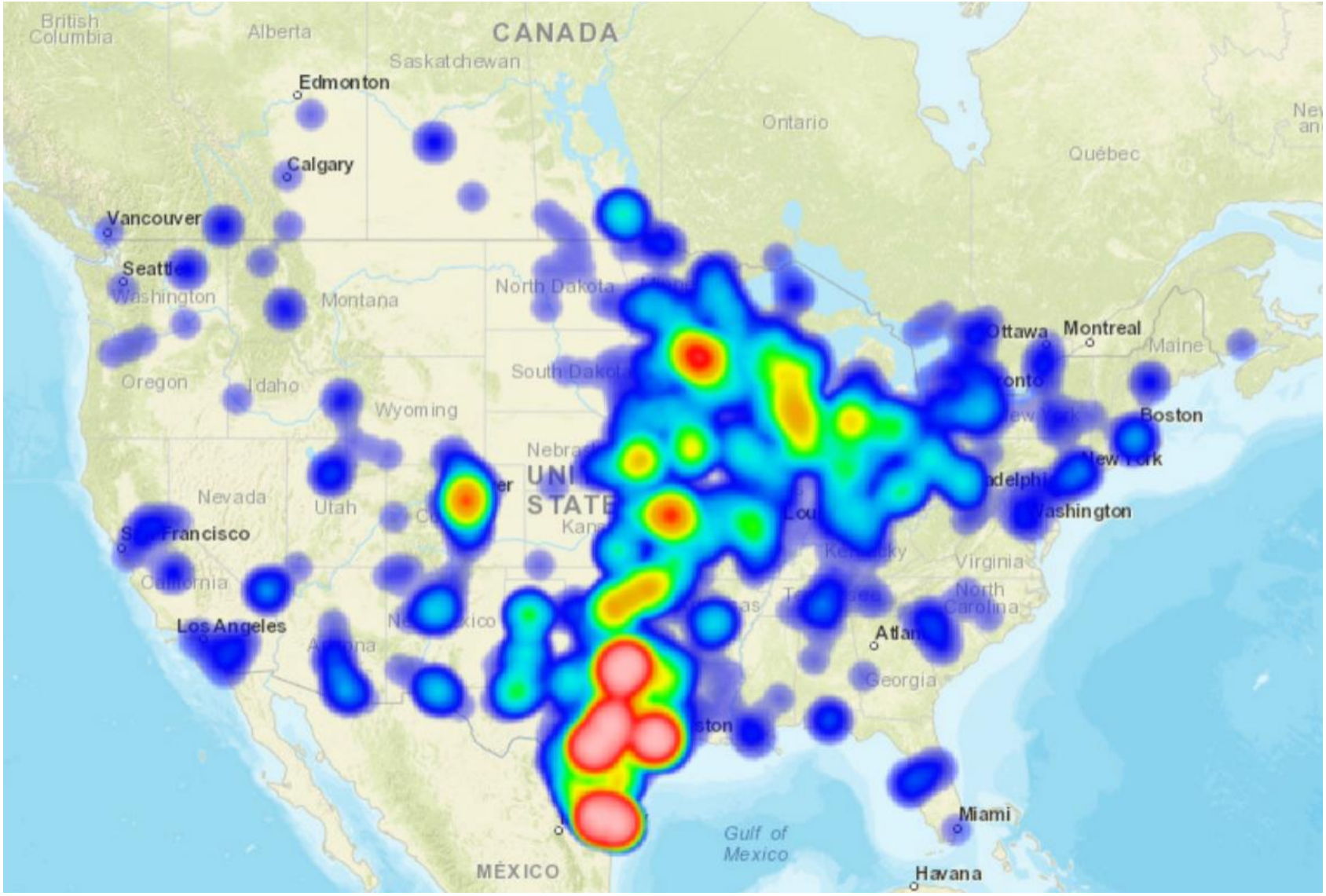
Fall Visitor Survey Respondents Map n=232



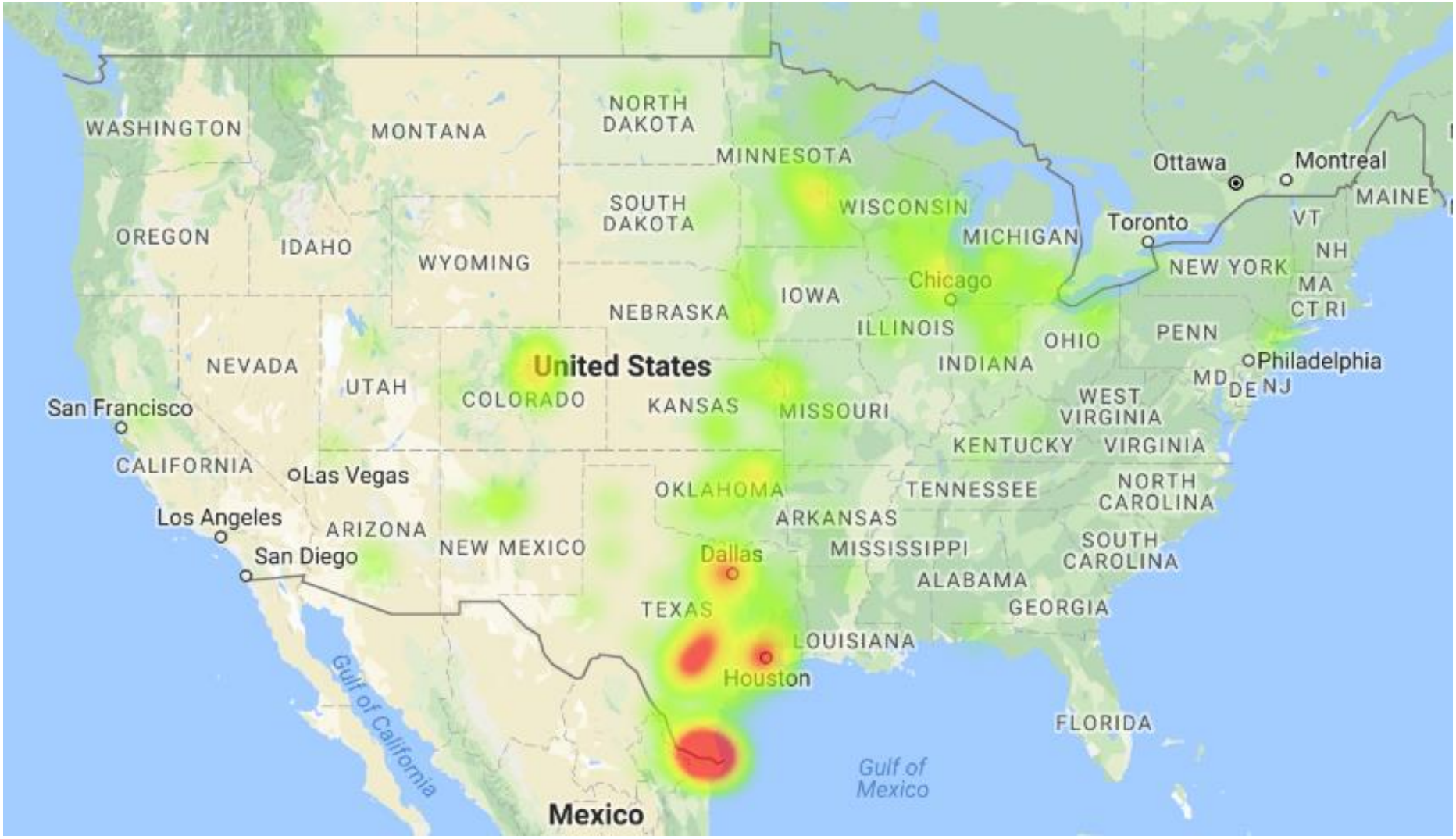
Winter Visitor Survey Respondents Map n=430



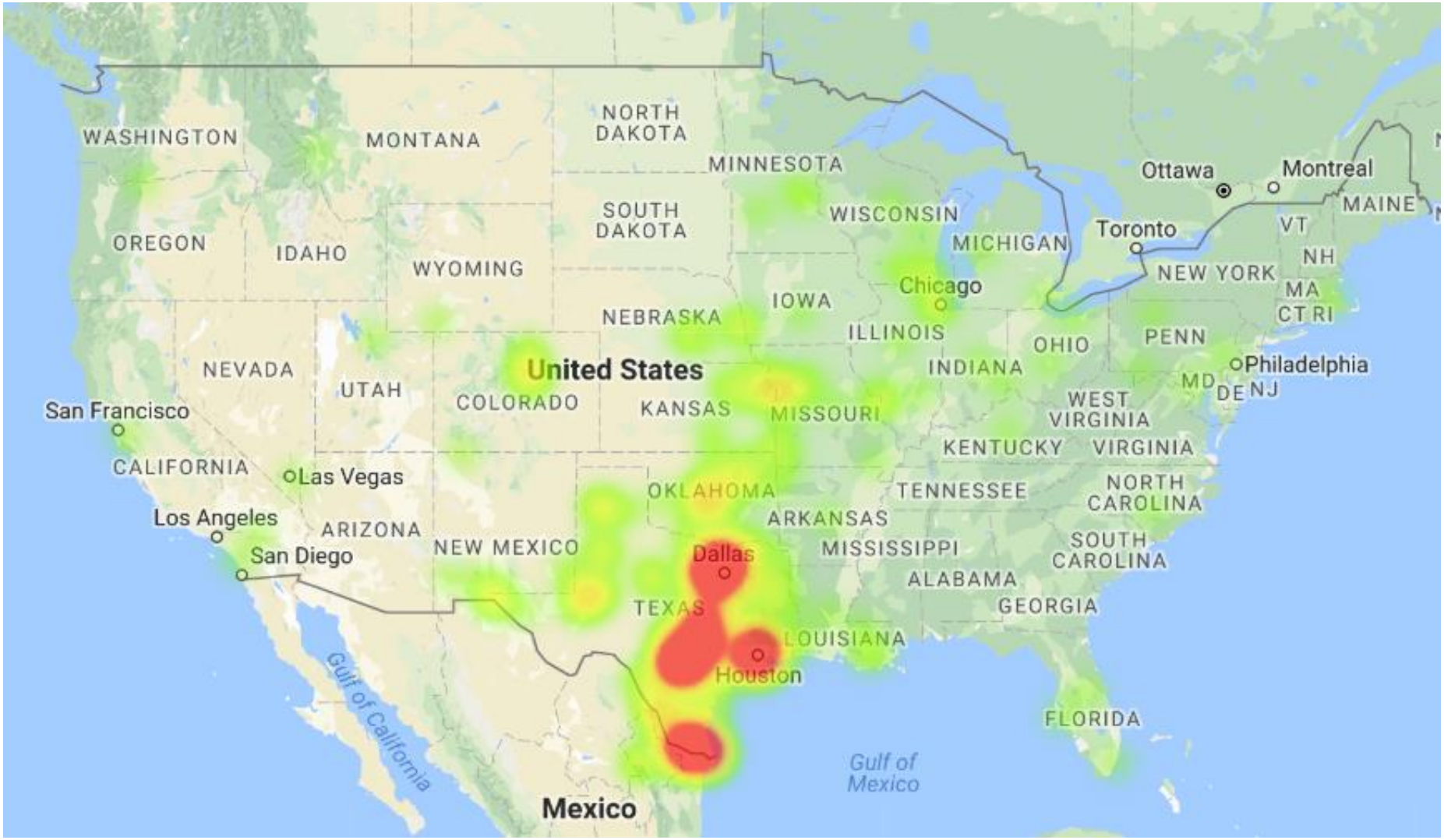
ALL Visitor Survey Respondents Map n=1,818



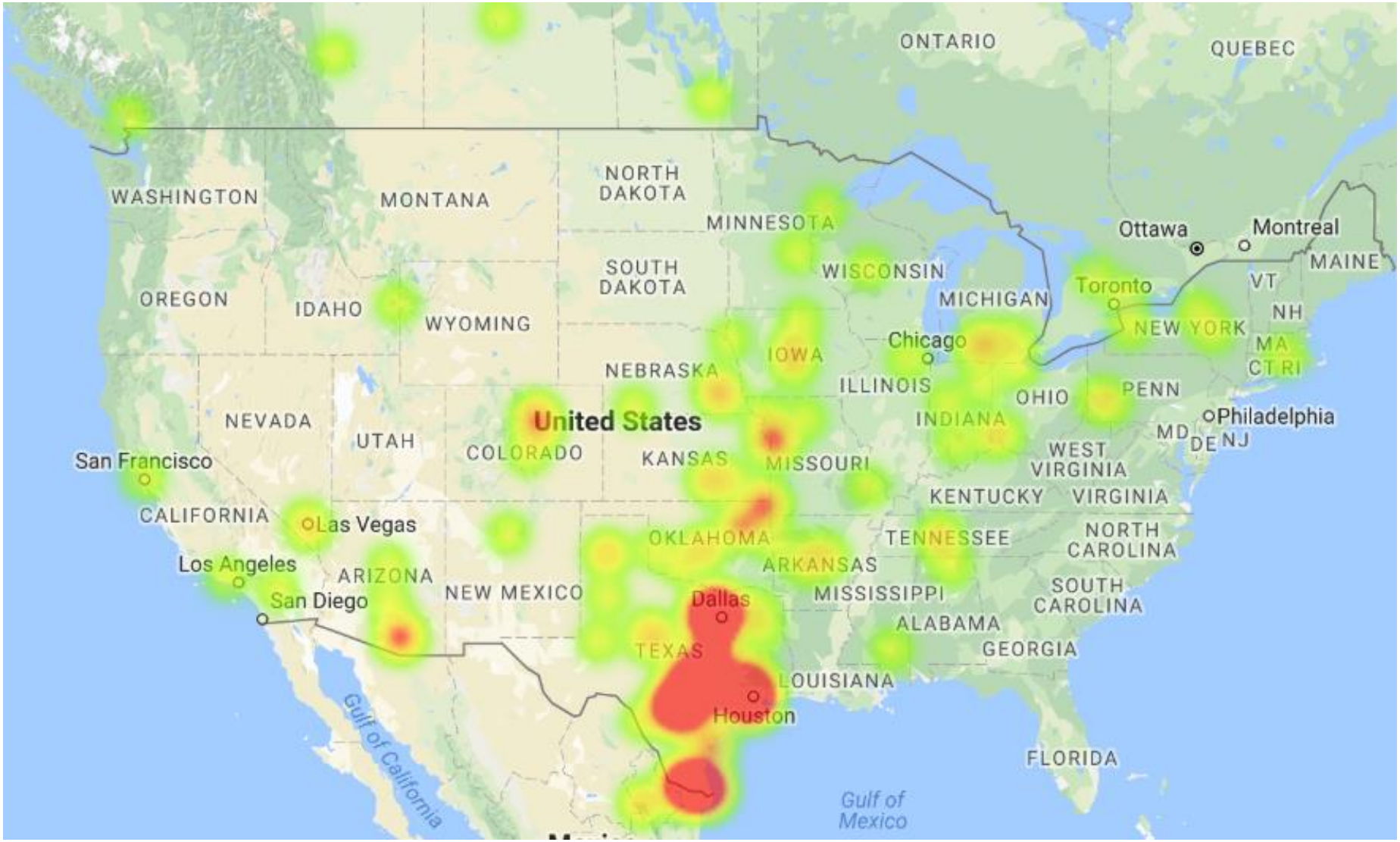
Spring Visitor Survey Respondents Map n=416



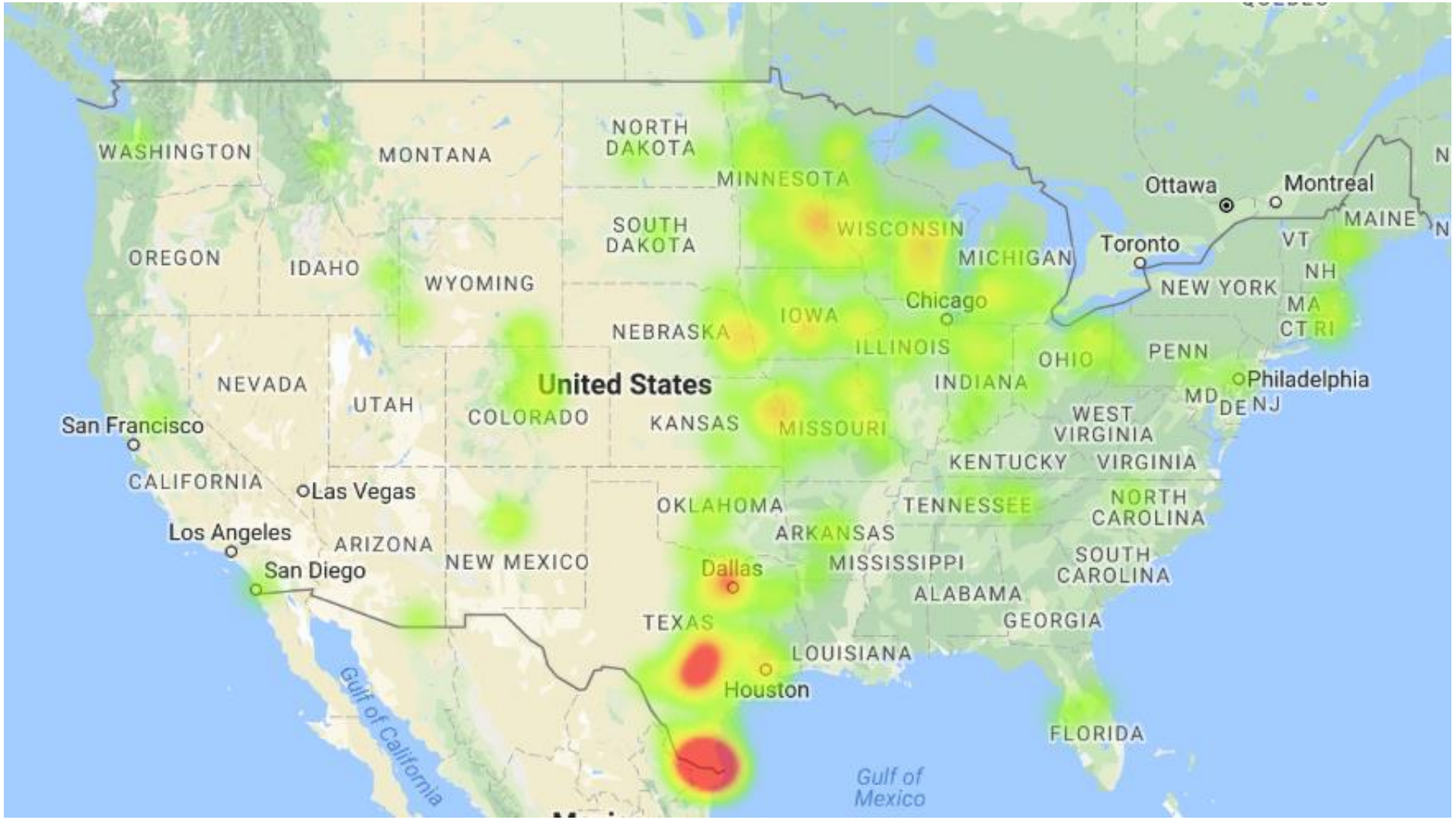
Summer Visitor Survey Respondents Map n=519



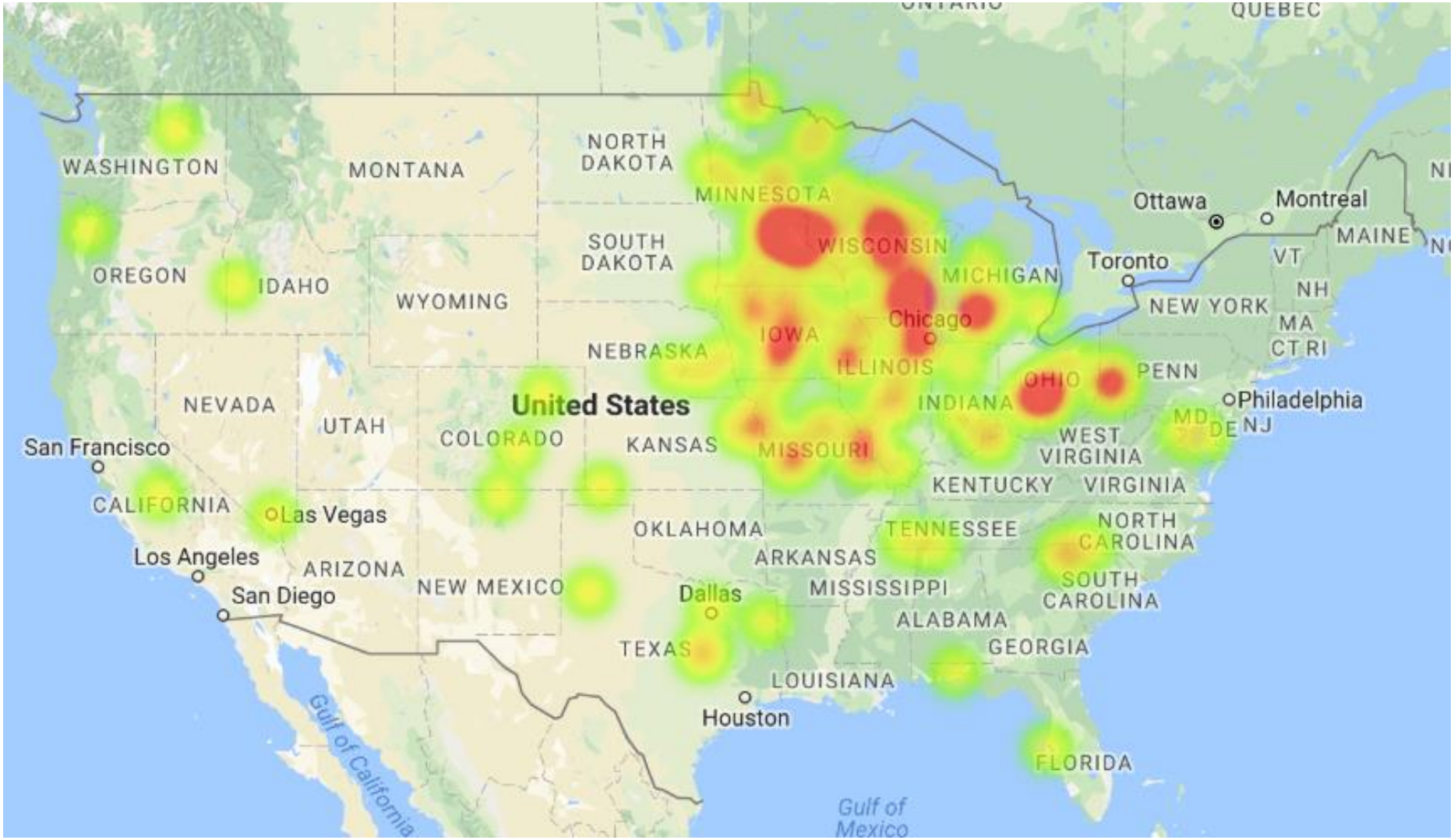
Fall Visitor Survey Respondents Map n=232



Winter Short-term Visitor Survey Respondents Map n=290



Winter Long-term Visitor Survey Respondents Map n=170



Visitors Point of Origin – Spring

State - City									
Texas- 61.3%		Victoria	2	Jefferson	1	Temple	1	Weather St Paul	1
Brownsville	23	Abilene	1	Killeen	1	Terrell	1	**WISCONSIN- 5.2%**	
San Antonio	19	Alamo	1	Kingwood	1	The Woodlands	1	Green Bay	2
Houston	15	Amarillo	1	Lakeway	1	Watauga	1	Lisbon	2
Harlingen	14	Azle	1	Leander	1	Waxahachie	1	Racine	2
McAllen	14	Bayview	1	Lewisville	1	Weslco	1	BARRON	1
Edinburg	13	Beasley	1	Livingston	1	Wichita Falls	1	eagle river	1
Austin	11	Bishop	1	Lubbock	1	Wickett	1	HANCOCK	1
Mission	8	Boerne	1	Lufkin	1	Wimberley	1	Kenosha	1
Katy	5	Buda	1	Marble Falls	1	Woodway	1	Lacrosse	1
Los Fresnos	5	Bulverde	1	Midlothian	1	**MINNESOTA- 5.7%**		Milwaukee	1
Weslaco	5	Cedar Creek	1	Natalia	1	Minneapolis	3	Monona	1
Arlington	4	Cedar Park	1	N Richland Hills	1	Big Lake	2	Montello	1
San Benito	4	Corsicana	1	Pearland	1	Alborn	1	Oshkosh	1
Converse	3	Dripping Springs	1	Penitas	1	Apple Valley	1	S Milwaukee	1
Dallas	3	Edcouch	1	Pflugerville	1	Buffalo	1	Stoughton	1
Donna	3	Elm Mott	1	Plano	1	Circle Pines	1	Sturgeon Bay	1
Ft Worth	3	Elsa	1	Port O' Connor	1	Clarmont	1	Twin Lakes	1
Laredo	3	Ennis	1	Portland	1	Cottonwood	1	Wausau	1
San Juan	3	Fate	1	Raymondville	1	Faribault	1	Wisconsin Dells	1
Cleveland	2	Galveston	1	Richmond	1	Fort Ripley	1	**OKLAHOMA- 4.5%**	
Conroe	2	Georgetown	1	Rio Hondo	1	Oakdale	1	Tulsa	5
Frisco	2	Gonzales	1	Robinson	1	Park Rapids	1	Broken Arrow	3
Granbury	2	Grand Prairie	1	Roma	1	Pelican Rapids	1	Blanchard	1
Laguna Vista	2	Hempstead	1	Rusk	1	Rochester	1	Coalgate	1
New Braunfels	2	Hickory Creek	1	Seadrift	1	Rochester	1	Edmond	1
Palmhurst	2	Hidalgo	1	Sonora	1	Saint Paul	1	Grove	1
Pharr	2	Highland Village	1	Sugar Land	1	Side Lake	1	Hobart	1
Port Isabel	2	Hurst	1	Temple	1	St Cloud	1	Newcastle	1
Santa Rosa	2	Jacksonville	1	Terrell	1	Tower	1	Oklahohma	1

Visitors Point of Origin – Spring

State - City									
Shawnee	1	Howell	1	**IOWA- 1.0%**		**UTAH- 0.5%**		**INTERNATIONAL**	
Stillwater	1	Jackson	1	Garner	1	Herriman	1	**MEXICO- 57.1%**	
Wagoner	1	Kalamazoo	1	Sanborn	1	St George	1	Reynosa	3
COLORADO- 4.2%		Livonia	1	Sioux City	1	**ARKANSAS- 0.2%**		Tamaulipas	1
Aurora	3	MONROE	1	Underwood	1	Benton	1	Garcia	1
Littleton	3	Wyoming	1	**NEW MEXICO- 1.0%**		**CALIFORNIA- 0.2%**		Monterrey	1
Colorado Springs	2	**INDIANA- 2.0%**		Albuquerque	1	Lodi	1	Saltillo	1
Lakewood	2	LaFontaine	2	Rio Rancho	1	**FLORIDA- 0.2%**		San Nicolas	1
Bailey	1	South Bend	2	Santa Fe	1	Crestview	1	**CANADA- 35.7%**	
Berthoud	1	Fishers	1	**NEW YORK- 0.7%**		**LOUISIANA- 0.2%**		London, Ontario	1
Denver	1	LaPorte	1	Johnsonville	1	Oak Ridge	1	Alberta	1
Grand Junction	1	roanoke	1	New York	1	**MONTANA- 0.2%**		Port Colborne	1
Greeley	1	Rome City	1	Queens	1	Libby	1	Sprague	1
Morrison	1	**ILLINOIS- 1.5%**		**OHIO- 0.7%**		**WASHINGTON- 0.2%**		Virden	1
Thornton	1	Brimfield	1	Akron	1	Kennewick	1	**UNITED KINGDOM- 7.1%**	
KANSAS- 2.7%		Carpentersville	1	Brooklyn	1			Poole	1
Lenexa	2	Chicago	1	Paineville	1				
Manhattan	2	Dekalb	1	**ARIZONA- 0.5%**					
Colwich	1	Galesburg	1	Casa Grande	1				
Derby	1	Round Lake	1	Chandler	1				
Fort Scott	1	**MISSOURI- 1.2%**		**KENTUCKY- 0.5%**					
Kansas City	1	Branson	1	Bowling Green	1				
Shawnee	1	Kansas City	1	Winchester	1				
Valley Falls	1	Lake Ozark	1	**NORTH DAKOTA- 0.5%**					
Wichita	1	Lee's Summit	1	Minnewaukan	1				
MICHIGAN- 2.7%		Sunrise Beach	1	Velva	1				
Grand Rapids	2	**NEBRASKA- 1.2%**		**SOUTH DAKOTA- 0.5%**					
Bloomfield Hills	1	Omaha	3	Huron	1				
Fenwick	1	Fort Calhoun	1	Watertown	1				
Grand Haven	1	South Sioux City	1						

Visitors Point of Origin – Summer

State - City											
TEXAS- 79.3%		McKinney	3	Pharr	2	Cuero	1	Live Oak	1
San Antonio	52	Plano	3	Rio Grande City	2	Deer Park	1	Longview	1
Austin	21	Round Rock	3	Rosenberg	2	Desoto	1	Madisonville	1
Fort Worth	16	Sanger	3	San Benito	2	Eagle Pass	1	Malakoff	1
houston	12	Spring	3	San Juan	2	Edcouch	1	Mason	1
McAllen	11	Waco	3	Alice	1	Elsa	1	Moody	1
Dallas	9	Watauga	3	Alton	1	Flower Mound	1	Nacogdoches	1
Edinburg	8	Abilene	2	Alvarado	1	Fort Hood	1	Needville	1
Harlingen	8	Alamo	2	Andrews	1	Foty Worth	1	Oak Point	1
Brownsville	7	Boerne	2	Anson	1	Fredericksburg	1	Palmview	1
Laredo	7	Carrollton	2	Bastrop	1	Gatesville	1	Pearland	1
Mission	7	Cibolo	2	Baytown	1	Granbury	1	Peñitas	1
Arlington	5	Corpus Christi	2	Beaumont	1	Greenville	1	Pflugerville	1
Weslaco	5	Cypress	2	Bedford	1	Hallettsville	1	Porter	1
Buda	4	Devine	2	Bellville	1	Hallsville	1	Portland	1
Denton	4	Donna	2	Benbrook	1	Haltom City	1	Rancho Viejo	1
El Paso	4	Frisco	2	Blum	1	Hebbronville	1	Raymondville	1
Missouri City	4	Frost	2	Canyon	1	Helotes	1	Red Oak	1
New Braunfels	4	Georgetown	2	Carrizo Springs	1	Hewitt	1	Richardson	1
Odessa	4	Humble	2	Celeste	1	Hurst	1	Rio Grande	1
SCHERTZ	4	Kingwood	2	Channelview	1	Hutto	1	Rio Hondo	1
Allen	3	Kyle	2	Clarendon	1	Jacksonville	1	Salado	1
Amarillo	3	Los Fresnos	2	Cleburne	1	Jarrell	1	San Augustine	1
Belton	3	Lubbock	2	Cleveland	1	Keller	1	Sierra Blanca	1
Cedar Park	3	Mercedes	2	College Station	1	Kerrville	1	Simms	1
copperas cove	3	Midland	2	Columbus	1	Klein	1	Somerset	1
Garland	3	Monahans	2	Comfort	1	Lake Kiowa	1	Spicewood	1
Katy	3	New Caney	2	Commerce	1	Lakewood	1	Splendora	1
League City	3	Paris	2	Conroe	1	Lantana	1	Spring Branch	1
Leander	3	Pasadena	2	Corinth	1	Little Elm	1	Sugar Land	1

Visitors Point of Origin – Summer

State - City									
Sullivan City	1	**MISSOURI- 2.4%**		Chicago	1	Orlando	1	**MASSACHUSETTS- 0.2%**	
Temple	1	Kansas City	3	Dieterich	1	**MINNESOTA- 0.6%**		Brockton	1
Terrell	1	Blue Springs	1	Godfrey	1	Big Lake	1	**MONTANA- 0.2%**	
The Woodlands	1	Bosworth	1	Madison	1	Blaine	1	Stevensville	1
Tomball	1	Jefferson City	1	Morton	1	Sacred Heart	1	**NORTH CAROLINA- 0.2%**	
Tyler	1	Joplin	1	Oak Park	1	**NEW MEXICO- 0.6%**		Stedman	1
Victoria	1	Lee's Summit	1	**NEBRASKA- 1.2%**				**NEVANA- 0.2%**	
Weatherford	1	Lexington	1	Omaha	3	**ARKANSAS- 0.4%**		Las Vegas	1
Whitesboro	1	Nevada	1	Grand Island	2	Bella Vista	1	**OREGON- 0.2%**	
Wichita Falls	1	Poplar Bluff	1	York	1	Little Rock	1	Mosier	1
Wimberley	1	St. Louis	1	**WISCONSIN- 1.2%**		**INDIANA- 0.4%**		**UTAH- 0.2%**	
Wolfforth	1	**KANSAS- 1.8%**		Fort Atkinson	1	Fishers	1	Orem	1
Zapata	1	Manhattan	2	Kansasville	1	New Alsace	1	**WYOMING- 0.2%**	
OKLAHOMA- 4.0%		Auburn	1	Madison	1	**MARYLAND- 0.4%**			
Oklahoma City	4	Galena	1	Muskego	1	Grantsville	1		
Norman	2	Hiawatha	1	Neenah	1	Woodbine	1	**INTERNATIONAL**	
Ada	1	Lawrence	1	Wausau	1	**MICHIGAN- 0.4%**		**MEXICO- 85.7%**	
Broken Arrow	1	Leavenworth	1	**LOUISIANA- 1.0%**		Brownstown	1	Reynosa	6
Cleveland	1	Prairie Village	1	Denham Springs	1	Fremont	1	Monterrey	5
Cushing	1	Wichita	1	Dequincy	1	**OHIO- 0.4%**		Matamoros	2
Dewey	1	**COLORADO- 1.4%**		New Orleans	1	Avon	1	Guadalupe	1
Duncan	1	Aurora	1	Pineville	1	Columbus	1	**CANADA- 7.1%**	
Edmond	1	Castle Rock	1	Thibodaux	1	**PENNSYLVANIA- 0.4%**		Camrose	1
Elk City	1	Denver	1	**CALIFORNIA- 0.6%**		Johnsonburg	1	**ENGLAND- 7.1%**	
Glenpool	1	Fort Collins	1	Oceanside	1	Pottstown	1	Swanley Kent	1
Moore	1	Littleton	1	Palo Alto	1	**IOWA- 0.2%**			
Stillwater	1	Louisville	1	Yucca Valley	1	Des Moines	1		
Stilwell	1	Morrison	1	**FLORIDA- 0.6%**		Des Moines	1		
Tulsa	1	**ILLINOIS- 1.4%**		Bradenton	1	**KENTUCKY- 0.2%**			
Yukon	1	Burbank	1	Miami	1	Danville	1		

Visitors Point of Origin – Fall

State - City											
TEXAS- 65.9%		Alvarado	1	Los Fresnos	1	Lawton	1	Fort Smith	1
San Antonio	14	Arlington	1	Lubbock	1	Norman	1	Hot Springs	1
Houston	8	Boerne	1	Manor	1	Oklahoma City	1	**IOWA- 1.8%**	
Harlingen	6	Brownsville	1	Manvel	1	Quapaw	1	Ames	2
Austin	4	Bryan	1	Mercedes	1	Sayre	1	Des Moines	1
Edinburg	4	Buda	1	Mico	1	**MISSOURI- 3.2%**		Mason City	1
Keller	4	Burleson	1	Milano	1	Kansas City	3	**INDIANA- 1.8%**	
Dallas	3	Campbellton	1	Mt Calm	1	Brookfield	1	Bloomington	1
Katy	3	Canyon Lake	1	No. Richland	1	Fredericktown	1	Fort Wayne	1
Mission	3	Cedar Hill	1	Norton	1	Greenwood	1	Lafayette	1
New Braunfels	3	Cedar Park	1	Odessa	1	Savannah	1	West Harrison	1
San Marcos	3	College Station	1	Palmview	1	**ARIZONA- 2.7%**		**MICHIGAN- 1.8%**	
Spring	3	Corpus Christi	1	Pearland	1	Sahuarita	3	Albion	1
Waco	3	Coleman	1	Penitas	1	Apache Junction	1	Battle Creek	1
Amarillo	2	Denton	1	Plano	1	Rimrock	1	Brighton	1
Conroe	2	Devine	1	Rancho Viejo	1	Tucson	1	Kalamazoo	1
Coppell	2	Eagle Pass	1	Sachse	1	**COLORADO- 2.3%**		**CALIFORNIA- 1.4%**	
Elgin	2	Edcouch	1	Scroggins	1	Centennial	2	Camino	1
Liberty Hill	2	Flatonia	1	Springtown	1	Canon City	1	Palm Springs	1
Lytle	2	Fort Worth	1	Sunrise Beach	1	Denver	1	Simi Valley	1
Mcallen	2	Grand Prairie	1	Temple	1	Erie	1	**KANSAS- 1.4%**	
Pflugerville	2	Haltom City	1	Tyler	1	**NEBRASKA- 2.3%**		Wichita	2
Portland	2	Hondo	1	Venus	1	McCook	1	Eureka	1
Richmond	2	Huntsville	1	Victoria	1	Roca	1	**NEW YORK- 1.4%**	
Round Rock	2	Hutto	1	Wimberley	1	Roca Look	1	Buffalo	1
San Benito	2	La Feria	1	Woodlands	1	Seward	1	Camden	1
Abilene	1	Lago Vista	1	**OKLAHOMA- 5.0%**		South Sioux City	1	Cooperstown	1
Alamo	1	Leander	1	Tulsa	3	**ARKANSAS- 1.8%**		**NEVADA- 0.9%**	
Allen	1	Lewisville	1	Miami	2	Cabot	1	Henderson	1
Alton	1	Lorena	1	Grove	1	Conway	1	Las Vegas	1

Visitors Point of Origin – Fall

State - City			
OHIO- 0.9%		**INTERNATIONAL**	
	Loveland	1	**CANADA- 70.0%**
	Toledo	1	Winnipeg 2
PENNSYLVANIA- 0.9%			Saskatoon 1
	Delmont	1	Courtice 1
	Pittsburgh	1	Collingwood 1
TENNESSEE- 0.9%			North Vancouver 1
	Columbia	2	Calgary 1
WISCONSIN- 0.9%		**MEXICO- 30.0%**	
	Spencer	1	Monterrey 2
	Superior	1	Reynosa 1
ALASKA- 0.5%			
	Anchorage	1	
ALABAMA- 0.5%			
	Huntsville	1	
IDAHO- 0.5%			
	Victor	1	
ILLINOIS- 0.5%			
	Elburn	1	
MINNESOTA- 0.5%			
	Minneapolis	1	
MISSISSIPPI- 0.5%			
	Ellisville	1	
NEW MEXICO- 0.5%			
	Los Alamos	1	
RHODE ISLAND- 0.5%			
	Pascoag	1	

Visitors Point of Origin – Winter Short-term

State - City											
TEXAS- 42.7%		Frisco	1	Granite Falls	1	Menomonee	1	Warrenton	1
Brownsville	12	Georgetown	1	Hallock	1	Omro	1	Washington	1
San Antonio	12	Granbury	1	Hillman	1	Rice Lake	1	**MICHIGAN- 3.2%**	
Harlingen	11	Kenny County	1	Holdingford	1	Sun Prairie	1	Augusta	1
Mission	8	Kyle	1	Hugo	1	Waupaca	1	Farmington Hills	1
McAllen	6	La Feria	1	Lake Crystal	1	Wausau	1	Hopkins	1
Edinburg	5	Leander	1	Lengby	1	West Allis	1	Houghton Lake	1
Houston	5	Liberty Hill	1	Long Prairie	1	West Bend	1	Laurium	1
Austin	4	Lockhart	1	Nevis	1	**IOWA- 5.0%**		Mt. Pleasant	1
Weslaco	4	Longview	1	Pelican Rapids	1	Des Moines	3	Wayland	1
Carrollton	2	Los Fresnos	1	Richfield	1	Council Bluffs	2	Williamston	1
College Station	2	Magnolia	1	Sacred Heart	1	West Liberty	2	Zeeland	1
Corpus Christi	2	Mercedes	1	Shoreview	1	Anamosa	1	**NEBRASKA- 3.2%**	
Donna	2	Penitas	1	Spring Valley	1	Callender	1	Fremont	2
Laguna Vista	2	Red Oak	1	St Paul Park	1	Emmetsburg	1	Lincoln	2
Little Elm	2	Rio Grande City	1	Stewartville	1	Homestead	1	Dodge	1
Pharr	2	Rio Hondo	1	Winsted	1	Pleasantville	1	Elkhorn	1
Rancho Viejo	2	Round Rock	1	**WISCONSIN- 7.5%**		Storm Lake	1	Madison	1
San Benito	2	Stephenville	1	Redgranite	2	Urbandale	1	Omaha	1
Schertz	2	Tyler	1	Appleton	1	**MISSOURI- 4.6%**		Wynot	1
Alamo	1	Uvalde	1	Bangor	1	Hannibal	2	**KANSAS- 2.8%**	
Arlington	1	Wichita Falls	1	Blair	1	Cj	1	Lawrence	2
Canyon Lake	1	Yoakum	1	Bloomer	1	Fredericktown	1	Kansas City	1
Cedar Creek	1	**MINNESOTA- 9.6%**		Cottage Grove	1	Independence	1	Lacygne	1
Cibolo	1	Duluth	3	Eau Claire	1	Isage Beach	1	Manhattan	1
Coppell	1	Grove Heights	2	Freedom	1	Kansas City	1	Olathe	1
Dallas	1	Zumbrota	2	Green Bay	1	Kearney	1	Ottawa	1
Denton	1	Blaine	1	Hayward	1	Moberly	1	Valley Center	1
El Cenizo	1	Detroit Lakes	1	Holmen	1	Osceola	1	**INDIANA- 2.5%**	
Fort Worth	1	Eden Prairie	1	Kaukauna	1	Union	1	Huntingburg	1

Visitors Point of Origin – Winter Short-term

State - City							
Huntington	1	**ARKANSAS- 1.1%**		Edgewood	1	**INTERNATIONAL**	
Monticello	1	Benton	1	**SOUTH DAKOTA- 0.7%**		**CANADA- 62.5%**	
Nashville	1	Little Rock	1	Blunt	1	Winnipeg	2
Rochester	1	Magnolia	1	Sioux Falls	1	Kincardine	1
Tipton	1	**PENNSYLVANIA- 1.1%**		**ARIZONA- 0.4%**		Nanticoke	1
Westville	1	Aldan	1	Sierra Vista	1	Port Severn	1
OHIO- 2.5%		Mechanicsburg	1	**IDAHO- 0.4%**		**MEXICO- 37.5%**	
Aurora	1	Pittsburgh	1	Swan Valley	1	San Luis Potosi	1
Cincinnati	1	**TENNESSEE- 1.1%**		**MONTANA- 0.4%**		San Pedro Garza	1
Cleveland	1	Antioch	1	Missoula	1	Tamaulipas	1
Dayton	1	Crossville	1	**NORTH CAROLINA- 0.4%**			
Diamond	1	Greenback	1	Greensboro	1		
Holgate	1	**WYOMING- 1.1%**		**RHODE ISLAND- 0.4%**			
Millersburg	1	Laramie	2	Portsmouth	1		
COLORADO- 1.8%		Kemmerer	1	**WASHINGTON- 0.4%**			
Breckenridge	1	**CALIFORNIA- 0.7%**		Des Moines	1		
Castle Rock	1	Roseville	1				
Colorado Springs	1	San Diego	1				
Loveland	1	**FLORIDA- 0.7%**					
Wheat Ridge	1	Tampa	1				
ILLINOIS- 1.8%		Winter Park	1				
Barry	1	**MASSACHUSETTS- 0.7%**					
Joliet	1	Cambridge	1				
McNabb	1	Wrentham	1				
Moline	1	**MAINE- 0.7%**					
Peoria	1	Otisfield	2				
OKLAHOMA- 1.4%		**NORTH DAKOTA- 0.7%**					
Blanchard	1	Mandan	1				
Hominy	1	Valley City	1				
Skiatook	1	**NEW MEXICO- 0.7%**					
Yukon	1	Albuquerque	1				

Visitors Point of Origin – Winter Long-term

State - City									
MINNESOTA- 19.7%			Wausau	2		Milford	1	**OHIO- 6.1%**		**PENNSYLVANIA- 2.7%**	
	Hutchinson	2		Altoona	1		Mount Ayr	1		Columbus	5		Pittsburgh	3
	Williams	2		Antigo	1		Newell	2		Johnstown	1		Zelienople	1
	Bloomington	1		Chetek	1		Peosta	1		Medina	1	**NEBRASKA- 2.0%**		
	Brooklyn Park	1		Clayton	1		Roland	1		Mount Vernon	1		Grand Island	1
	Coon Rapids	1		Crivitz	1		Wapello	1		Springfield	1		Milford	1
	Crosslake	1		Elkhart Lake	1		Waterloo	1	**MICHIGAN- 5.4%**				Omaha	1
	Deerwood	1		Green Bay	1		Winterset	1		Allegan	1	**COLORDAO- 1.4%**		
	Dent	1		Janesville	1	**ILLINOIS- 6.8%**				Grand Rapids	1		Fort Morgan	1
	Eagan	1		Madison	1		Aledo	1		Pewamo	1		Pueblo	1
	Hastings	1		Menomonee	1		Bloomington	1		Richland	1	**FLORIDA- 1.4%**		
	La Crescent	1		Merrill	1		Carterville	1		Tustin	1		Clearwater	1
	Lakeville	1		Milwaukee	1		Chicago Ridge	1		Washington	1		Crestview	1
	Maple Grove	1		Oconomowoc	1		Decatur	1		Wayland	1	**SOUTH CAROLINA- 1.4%**		
	Minnetonka	1		Park Falls	1		Homer Glen	1		Zeeland	1		Moore	2
	Minnetrista	1		Rhinelander	1		North Aurora	1	**TEXAS- 3.4%**			**TENNESSEE- 1.4%**		
	Mnneapolis	1		Schofield	1		Ottawa	1		Lorena	2		Bethel Springs	1
	My.Lake	1		Solon Springs	1		Springfield	1		Dallas	1		Loretto	1
	Oakdale	1		Waukesha	1		Wauconda	1		Hallsville	1	**CALIFORNIA- 0.7%**		
	Pine Island	1		Waupaca	1	**MISSOURI- 6.8%**				Lubbock	1		Fresno	1
	Rockford	1		Wautoma	1		Maryland Hts	2	**INDIANA- 2.7%**			**IDAHO- 0.7%**		
	South Haven	1		Wisconsin Rapids	1		Bonne Terre	1		Vevay	2		Nampa	1
	St Anthony	1	**IOWA- 10.9%**				Climax Springs	1		Martinsville	1	**MARYLAND- 0.7%**		
	St. Cloud	1		Adel	1		Columbia	1		Rochester	1		St. Michaels	1
	St Croix	1		Ames	1		Dunnegan	1	**KANSAS- 2.7%**			**NORTH CAROLINA- 0.7%**		
	St. Paul	1		Bellevue	1		Festus	1		Hugoton	1		Charlotte	1
	Tower	1		Belmond	1		Mexico	1		Olathe	1	**NORTH DAKOTA- 0.7%**		
	Virginia	1		Columbus	1		St. Joseph	1		Overland Park	1		Fargo	1
WISCONSIN- 17.0%				Des Moines	1		Warsaw	1		Topeka	1	**NEW JERSEY- 0.7%**		
	Colgate	2		Forest City	1								Mahwah	1

Visitors Point of Origin – Winter Long-term

State – City			
NEW MEXICO- 0.7%		**INTERNATIONAL**	
Questa	1	**CANADA- 100%**	
NEVADA- 0.7%		Athens	2
Las Vegas	1	Niagara Falls	2
OREGON- 0.7%		Anola	1
Woodburn	1	Burlington	1
SOUTH DAKOTA- 0.7%		Fenelon Falls	1
Sioux Falls	1	Kagawong	1
VIRGINIA- 0.7%		London	1
Arlington	1	Manitoba	1
WASHINGTON- 0.7%		Mattawa	1
Coulee Dam	1	Newcastle	1
		North Bay	1
		Ottawa	1
		Quispamsis	1
		Saskatchewan	1
		Saskatoon	1
		Sudbury	1
		Sundridge	1
		Thunder Bsy	1
		Wasaga Beach	1
		Winnipeg	1
		Woodstock	1

South Padre Island CVB

Business / Conference / Meeting Survey Respondents

Summary & Observations:

- Typical Bus/Conf/Mtg travel party composition is **adults traveling with family and friends (73%)** indicating an opportunity to educate them about South Padre Island and encourage them to come back. Most are professionals.
- The vast majority of Bus/Conf/Mtg attendees indicate they are **repeat visitors (82%)** with 44% reporting they have been coming to South Padre Island over 20 years. 18% report this was their first visit.
- **Nearly 93% of Bus/Conf/Mtg attendees reside in Texas.** 73% report spending between 2 and 4 nights on their most recent trip.
- **Bus/Conf/Mtg attendees rate South Padre Island high (4.5) as a destination.**
- The top 3 attractions/activities someone in the travel party participated in are **beach (83%), Sea Turtle Center (43%) and Boat Tour (29%).**
- Bus/Conf/Mtg respondents reported **someone in their travel party attended** Sandcastle Days (63%), National Fireworks Show (44%), and Fishing Tournament (31%). Attending these events **enhanced their perception** of South Padre Island as a destination (91%)and their **likelihood of returning** to South Padre Island (87%).
- **83% indicate it is their favorite beach destination and 100% report they would recommend South Padre Island to others.**

Bus/Conf/Mtg Attendees

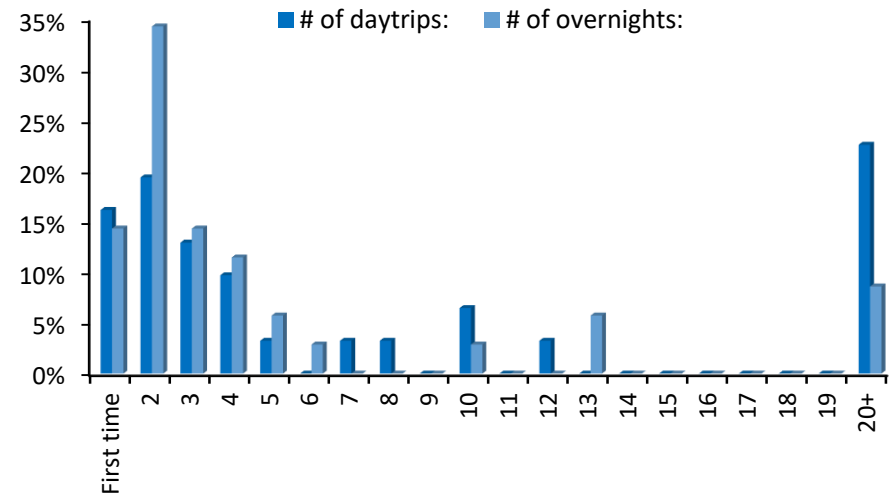
Respondent Demographics	Bus/Conf/Mtg n=33	
Age Group	Teens – 0.0%	Fifties – 12.1%
	Twenties – 9.1%	**Sixties – 24.2%**
	Thirties – 24.2%	Seventies – 2.1%
	Forties – 15.2%	Eighties – 0.0%
Gender		
Female		**54.6%**
Male		42.4%
Prefer not to answer		3.0%
Transgender		0.0%
Other		0.0%
Occupation		
Education - professor/teacher		**17.2%**
Executive/manager		13.8%
Self-employed		13.8%
Government/military		10.3%
Professional/technical		10.3%
Ethnicity		
White/Caucasian		**57.6%**
Hispanic or Latino		36.4%
Prefer not to answer		6.1%
Asian or Pacific Islander		3.0%
American Indian or Alaskan Native		0.0%
Black or African American		0.0%

Overall, how would rate your visit to South Padre Island? Use the scale provided below. n=36

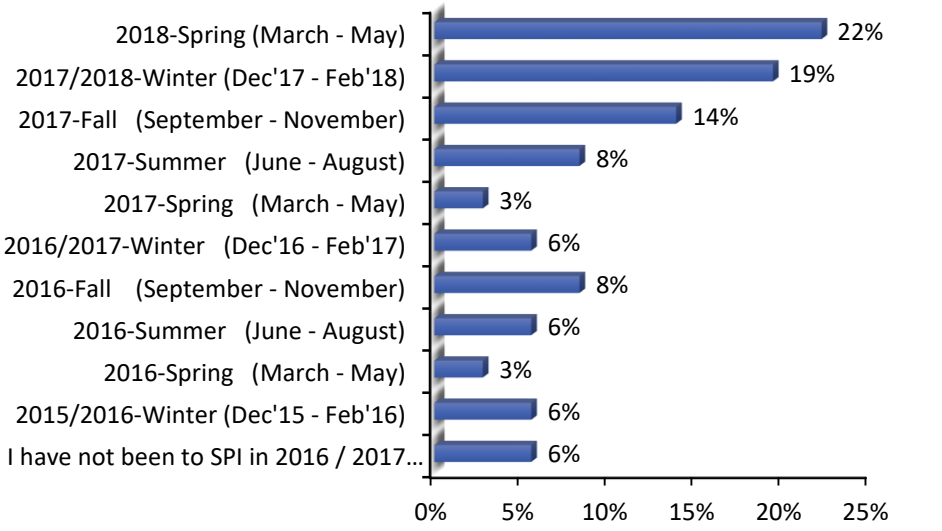
	Excellent	Good	Average	Poor	Very Poor	Rating Average
Overall experience	20	14	2	0	0	4.5

Bus/Conf/Mtg Attendees

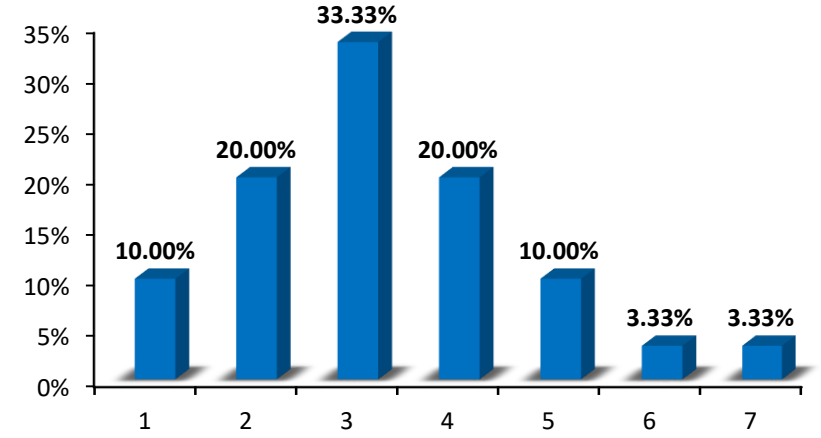
Annually, how many times do you typically visit South Padre Island? n=35



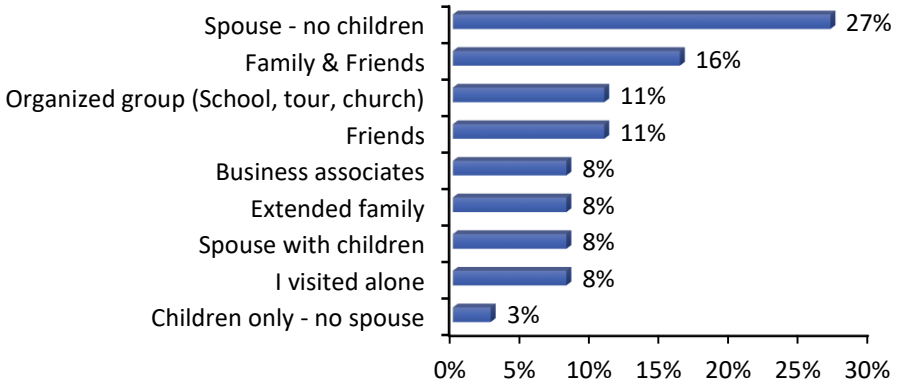
Please indicate the season (month/year) of your most recent visit from the list provided below. (Choose ONE answer for most recent visit) n=36



How many nights did you stay in South Padre Island on your most recent visit? n=30



Which of the following best describes the people who came with you on this visit to South Padre Island? (Check the response below that best describes your travel party)



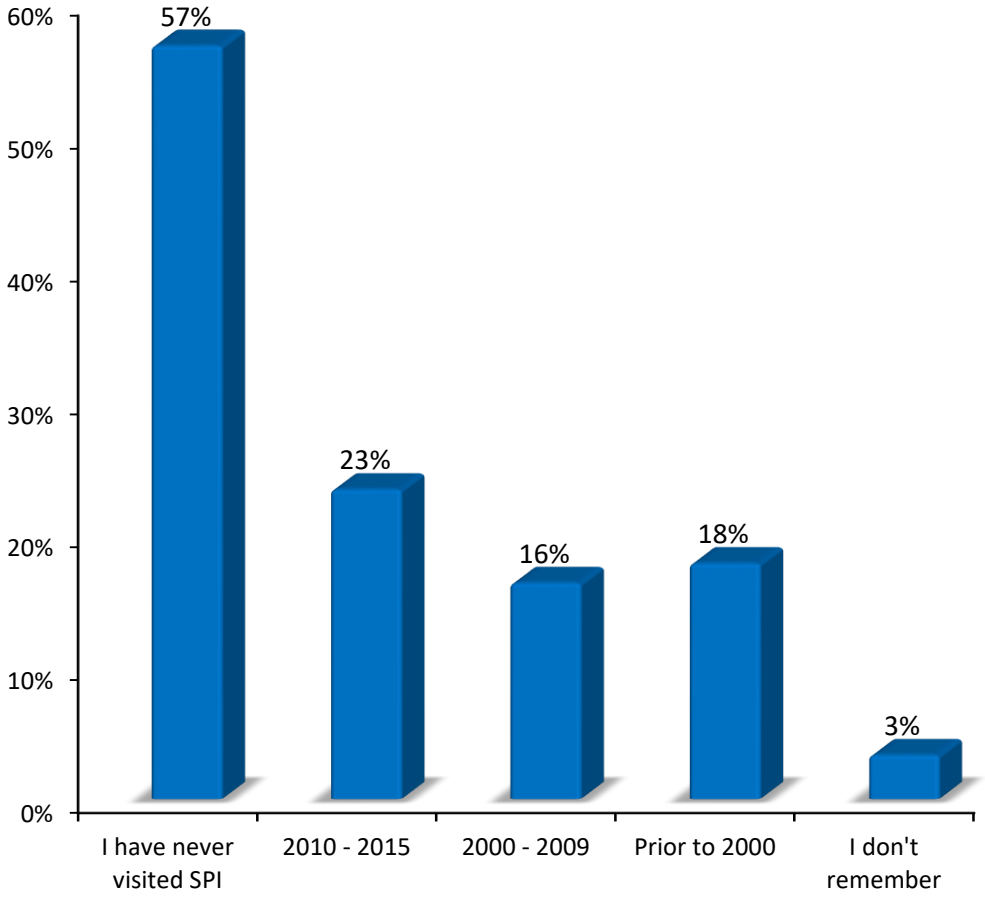
South Padre Island CVB

Respondents Did Not Visit SPI

YOUNG strategies, inc. fresh. travel. research.

Did not Visit SPI in last 3 years

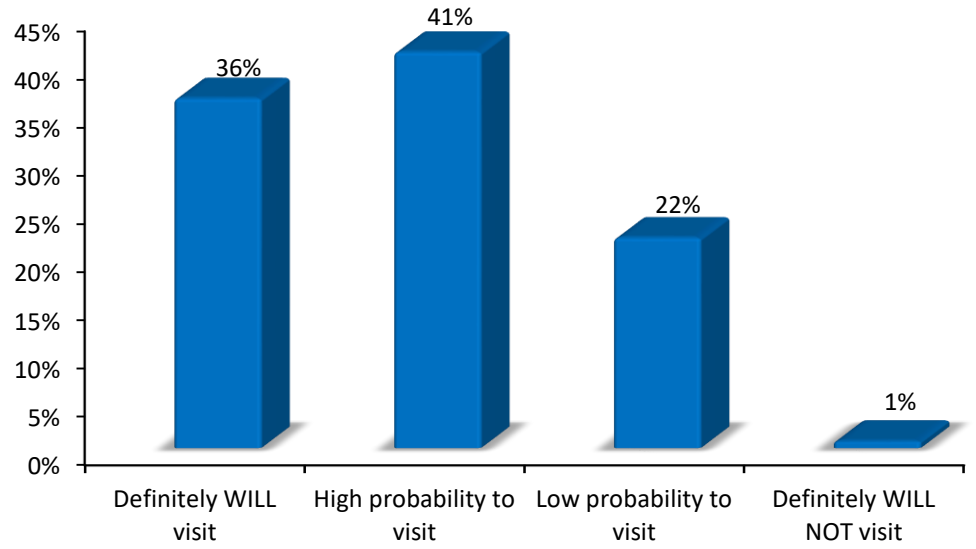
Have you ever visited South Padre Island? If yes, in which year(s) have you visited? n=39



Did not Visit SPI in last 3 years

Please tell us your likelihood of visiting SPI in the next two years (Page 1 of 2)

n=270



If you have any comments regarding future visitation to SPI please specify:

- Beaches and Attractions
- Before taking care of my sis, we came every year to Padre. Even thought of moving to Port Isabella
- Best RV Park choice on SPI ???
- Best vacationsI have ever had. Been coming since 1967 and have seen the changes and growth. SPI is a very important part of my life.
- Can't wait to visit
- Can't wait!!
- Children live In San Antonio, Texas
- Daughter and son-in-law live in Amarillo....Could be a possibility
- Not at the moment
- Don't want to get caught in a Hurricane.
- Gulf side beach front!
- Have been before, enjoyed it.
- Have been looking forward to vacationing in SPI for the last 10 years.
- help me find teacher workshops please
- Hook a brother up.
- Hoping for Honeymoon there.
- How did the hurricane affect the island?
- I am excited to go
- I am excited to start to plan my visit to SPI in the near future
- I am really looking forward to visiting South Padre. SPI and Big Bend are the only two parts of Texas that I have never been to.
- I am sooo looking forward to a visit soon!
- I do not know anything about south padre
- I enjoyed but weather is iffy in February, may try again
- I hope to visit soon as a birthday gift to my self
- I just would love to visit and enjoy new territory
- I love spi
- I MISS EVERYTHING ABOUT IT~
- I really want to visit South Padre. SPI and Big Bend are the only two places in Texas where I have never been.
- I see many things to doin/around the water. Yes, I will visit the beach area, but I want to visit neat shops, not little gift shops, some trendybart galleries, and restaurants other than bars that cater mire towards the younger age group.and I want to be able to walk to all this, not driving a car constantly.plus discounts foe seniors.
- I think it's really expensive
- I want to more than I can explain.
- I will be there April 2018
- I will visit the sea turtle shelter and want to explore more than before.
- I would like to see more pet friendly accommodations that allow more than 2 dogs....especially if they are small.
- I would like to visit, it's just such a drive from Central Texas.
- I would love to ride on the tour boat and see the dolphins swim beside the boat ...
- I would love to visit

Did not Visit SPI in last 3 years

Please tell us your likelihood of visiting SPI in the next two years (Page 2 of 2)
n=270

If you have any comments regarding future visitation to SPI please specify:

- I'm a lifelong Texas resident and its one of the few places in the state that I've not been to yet.
- Info on motels, restaurants
- Inseguridad
- Interested in family reunion share beach house
- It's a perfect place to have fun .:/) we sure love this park!
- It's been a really long time ago when i visited the island.
- Maximum
- Lodging. Camping events
- Looking forward to beach.
- Looking forward to bringing the family this summer
- Looking forward to checking off SPI and starting a great relationship with many visits to come!
- Looking forward to visiting
- Love the area and the people
- Love the atmosphere
- Love to play golf. Would love to know more about surrounding courses.
- Loved south padre. Hope to visit again.
- Loved the town and people we met.
- More food options
- More restaurants
- N/a
- N/a
- Need more rock show, fishing contest
- Needs more shopping, theme parks, aquarium, or something else to draw in family's.
- None really
- Not over spring break!
- Now that my son moved to Texas, we are more likely to visit south padre.
- Only if they prohibit drinking on the beach in march!
- Planning a visit in December 2018
- Please send info on a trip there
- Ready let's win
- Something to appeal to senior citizens
- Update shopping options, add entertainment for grown people, and we will come back
- Holidays
- Want to go fishing
- We are planning on going in august
- We are planning to visit again in September - SPI is one of our favourite spots
- We have wanted to visit for many years and always watch the episodes of beach front bargain hunt that are in that area of Texas as we would love to possibly relocate there!
- We prefer quiet activities
- We used to live in harlingen,tx and camp on so padre. It's one of the things we miss about living ib the RGV
- We've been talking about going this year to south padre island.
- What airlines fly to spi?
- Will be attending a conference in October.
- Will come in august
- Will have to find new condos after problem with Seabreeze beach resort!!!!
- Will visit if I stay healthy.
- Would like the best offer
- Would like to visit sometime
- Would love a guide on things you all have there
- Would love to visit

Did not Visit SPI in last 3 years

To help us understand your travel preferences, please tell us the last three places you have visited: (Page 1 of 2)

ALABAMA
- Alabama (3)
- Alabama Coast
- Gulf Shores, AL (7)
- Montgomery, AL
- Orange Beach, AL (4)

ALASKA
- Alaska (7)
- Alaska Cruise

ARIZONA
- Arizona (2)
- Chandler Az
- Grand Canyon (3)
- Mesa AZ
- Phoenix (5)
- Tucson, AZ (2)

ARKANSAS
- Arkansas (3)
- Bentonville, AR
- Crater Of Diamonds AR
- Northwest Arkansas
- Northwest Arkansas/Fayetteville

CALIFORNIA
- Anaheim Ca
- California (7)
- Carlsbad
- Disneyland, Anaheim, California
- Monterey, CA (2)
- Pismo Beach, CA
- San Diego, CA (5)
- San Diego/Los Angeles Ca
- Santa Barbara, California
- Santa Monica Ca
- Southern California (2)

COLORADO
- Colorado (6)
- Colorado Springs, CO (2)
- Denver (2)
- Rocky Mountain National Park
- Summit County, Co

DELAWARE
- Delaware (2)

FLORIDA
- Clearwater Beach
- Clearwater, Florida
- Cocoa Beach (2)
- Destin (10)
- Disney World (3)
- Florida (19)
- Florida Coast
- Ft Myers (3)
- Ft. Lauderdale FL
- Islamorada, FL
- Jacksonville FL
- Key Largo, FL
- Marathon , Fl
- Miami (3)
- Orlando (10)
- Panama City Beach, FL (3)
- Panama City, FL
- Pensacola, FL (2)
- Perdido Key, Florida
- Reddington Beach, FL
- sanibel island, FL
- Sarasota FL
- Singer Island, FL

FLORIDA *cont.*
- St Petersburg Florida
- St. Pete Beach
- St. Petersburg fl
- Tampa fl
- Universal Studios, Florida

GEORGIA
- Atlanta (3)
- Jekyll Island
- Savannah, GA (2)

HAWAII
- Hawaii (3)
- Hawaii,Guam,Saipan
- Maui (2)
- Oahu, HI

ILLINOIS
- Chicago (5)

INDIANA
- Indiana
- Indianapolis, Indiana

IOWA
- Des Moines, IA

KENTUCKY
- Louisville, KY

LOUISIANA
- Louisiana (3)
- New Orleans (5)
- NOLA

MARYLAND
- Baltimore MD

MASSACHUSETTS
- Boston, MA

MICHIGAN
- Lake Port MI
- Ludington, MI
- Marquette, MI
- Michigan (2)
- Pictured Rocks, MI
- Traverse City, Mi

MINNESOTA
- Minneapolis (2)
- Minnesota (2)

MISSISSIPPI
- Biloxi, Mississippi
- Mississippi (2)
- Mississippi Delta

MISSOURI
- Branson (7)
- Kansas City, MO (3)
- Lake Of The Ozarks, MO (3)
- Missouri
- St. Louis, Mo

MONTANA
- Montana

NEBRASKA
- Omaha, NE

NEVADA
- Las Vegas (13)
- Reno
- Vegas

NEW JERSEY
- Long Beach Island, NJ
- Lbi,nj
- Ocean City, NJ

NEW MEXICO
- New Mexico (3)
- Red River New Mexico
- Ruidoso New Mexico
- Santa Fe, New Mexico (2)
- Taos NM

NEW YORK
- New York
- New York City (2)
- NYC (3)
- Rochester, NY
- Staten Island NY

NORTH CAROLINA
- Asheville NC
- Charlotte, NC
- North Carolina (3)

OKLAHOMA
- Broken Bow, OK
- OKC
- Oklahoma (4)

OHIO
- Cincinnati Ohio

OREGON
- Oregon

PENNSYLVANIA
- Chadds Ford PA
- Philadelphia

RHODE ISLAND
- Rhode Island

SOUTH CAROLINA
- Charleston, SC
- Hilton Head, SC (2)
- Myrtle Beach SC (7)
- North Myrtle Beach SC

Did not Visit SPI in last 3 years

To help us understand your travel preferences, please tell us the last three places you have visited: (Page 2 of 2)

SOUTH CAROLINA *cont.*
- Savannah, SC
- South Carolina (2)

SOUTH DAKOTA
- South Dakota

TENNESSEE
- Gatlinburg, Tennessee (2)
- Nashville (4)
- Smokey Mountains, TN
- Tenn. Nashville
- Tennessee (4)

TEXAS
- Austin (10)
- Big Bend, TX
- Big Bend National Park
- Canyon Lake, TX
- Caprock TX
- Corpus Christi (9)
- Dallas (12)
- Disney Cruise Out Of Galveston
- Fredericksburg, TX (2)
- Ft. Davis, TX
- Galveston (21)
- Gruene, TX
- Great Wolf Lodge (Dallas,tx)
- Haiti
- Houston (9)
- Kemah Boardwalk
- Kingsville, Texas
- Laredo TX
- Midevil Times Dallas
- Mustang Island, TX (3)
- North Padre Island (2)
- North Padre Island/Corpus Christi

TEXAS *cont.*
- Padre Island, TX
- Port Aransas (6)
- Possum kingdom TX
- Rockport, TX (4)
- San Antonia, TX (18)
- San Antonio-Sea World
- Surf side, TX
- Texas (2)
- Waco (2)
- West Texas

UTAH
- Logan, UT
- Springdale, UT
- Utah

VIRGINIA
- Virginia
- Virginia Beach, VA
- Virginia, Washington, DC

WASHINGTON
- Seattle (3)

WEST VIRGINIA
- West Virginia

WISCONSIN
- Door County, Wisc
- Wisconsin (2)
- Wisconsin Dell's, Wisconsin (2)

WYOMING
- Yellowstone National Park (2)

MEXICO
- Cabo San Lucas (2)
- Cancun (6)
- Cozumel (5)
- Isla Mujeres

MEXICO *cont.*
- Los Cabos, MX
- Mexico (7)
- Puerto Vallarta (6)
- Rivera Maya Mexico

INTERNATIONAL / CANADA
- Antiqua
- Australia
- Bahamas (4)
- Belize (2)
- Caribbean (3)
- Caribbean Cruise
- Costa Rica (2)
- Dominican Republic (5)
- Europe (4)
- Exuma Island.
- France
- Germany (2)
- Honduras
- Hungary
- Jamaica (3)
- Jamaica Beach
- Nassau, Bahamas
- Netherlands, Germany, Austria, Hungary
- Old Quebec City, Canada (2)
- Ontario Canada
- Paris (4)
- Peru
- Portugal
- Puerto Plata Dominican Republic
- Puerto Rico
- Punta Cana (3)
- Roatan
- Rome
- San Juan, Puerto Rico

INTERNATIONAL / CANADA *cont.*
- San Pedro, Belize
- Singapore
- South Africa
- Spain
- St Thomas
- St. Lucia
- Sweden
- Switzerland
- The Caribbean
- Tokyo, Japan
- United Kingdom (2)
- Western Caribbean (Cruise)

MISCELLANEOUS/NOT SPECIFIC
- Canada And Upper Washington
- Cruise (2)
- Lake Tahoe
- Northeast - New York, New Jersey, New Hampshire, Vermont, Maine, Massachusetts
- Northwest - Idaho, Washington, Oregon, Montana
- Oregon, Washington, British Columbia, Alberta, Canada
- Texas, Oklahoma, California, Oregon, Montana
- Tms Nascar
- Washington, Minnesota, Florida, N&S Carolina Etc.
- Working too Much

South Padre Island CVB

Resident & Community Leader Survey Respondents

YOUNG strategies, inc. fresh. travel. research.

Purpose

YSI surveyed local residents of South Padre Island and Port Isabel to identify the perceptions of South Padre Island as a place to both reside and host out-of-town guests. A survey instrument was developed to help identify the perceptions of South Padre Island as a travel destination as well as a place to work, live and retire. Strengths, weaknesses, opportunities and threats related to the promotion of South Padre Island as a destination were also gathered from the community leaders of South Padre Island.

Methodology

Resident questions were prepared as part of the South Padre Island visitor survey by the Young Strategies research team and approved by the SPICVB. Local attractions deployed the survey invitation to their databases that included residents and visitors. Those taking the online survey were asked if they were residents of or visitors to South Padre Island/Port Isabel. Residents answered questions related to hosting visitors in their South Padre Island homes.

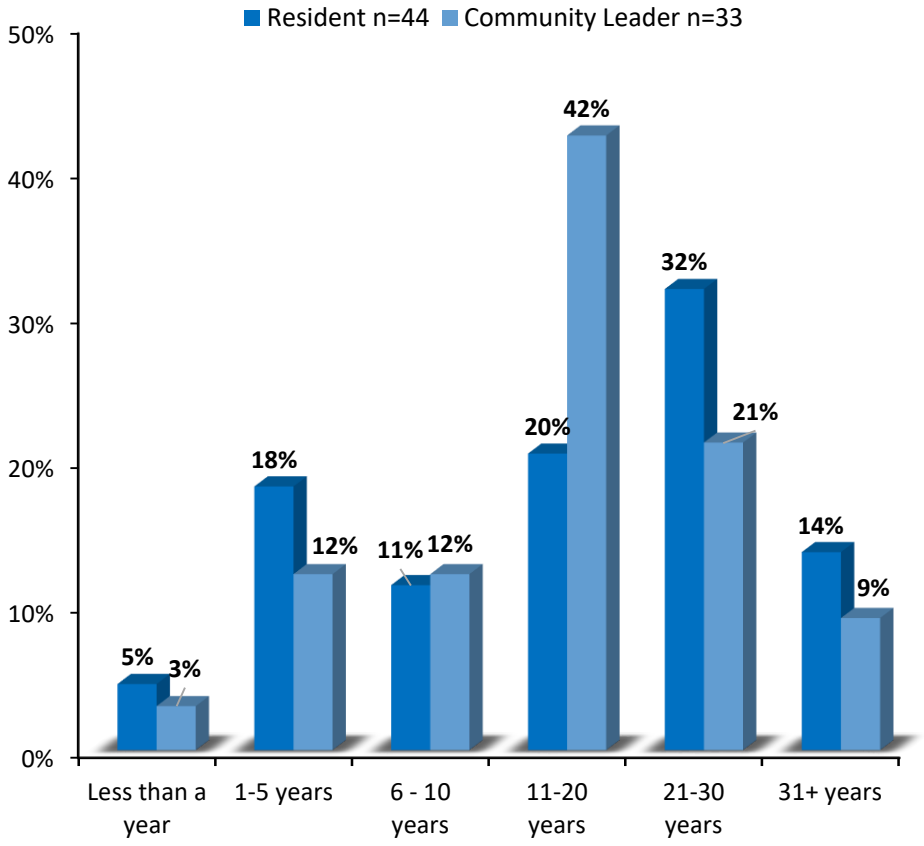
The South Padre Island Convention & Visitors Bureau provided YSI with a database of community leaders that included elected officials, board members, hoteliers, restaurateurs, attractions, Chamber of Commerce leaders and various business leaders. An online survey instrument was prepared by the Young Strategies research team and approved by SPICVB staff. A total of 63 community leaders provided in the SPICVB database were invited by email to take the community leader survey online; 35 surveys were received from the SPICVB database for a 56% response rate. Three additional community leader surveys were received from a unique weblink created for the Board of Directors for Padre Owners Who Care (POWC), thus N = 38.

South Padre Island Residency and Leadership

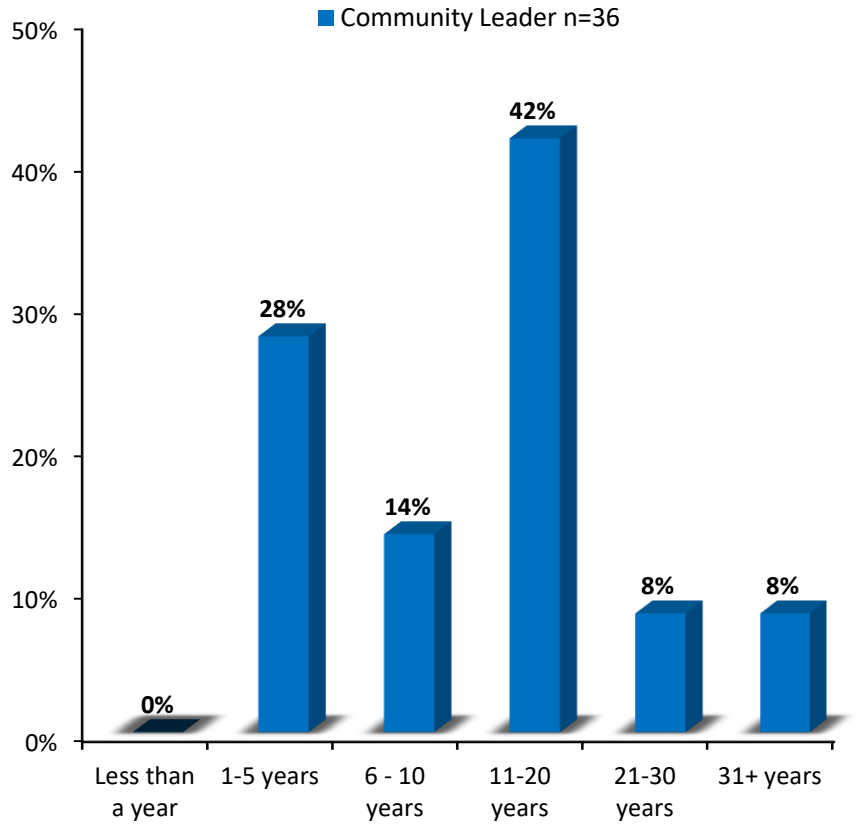
Observations:

- The majority of Residents (65.9%) and Community Leaders (72.7) report residing in South Padre Island 11+ years.
- 58.3% of Community Leaders report being active in community affairs for 11+ years

How long have you lived in South Padre Island?



How long have you been actively involved in the South Padre Island community affairs and/or leadership? N=36

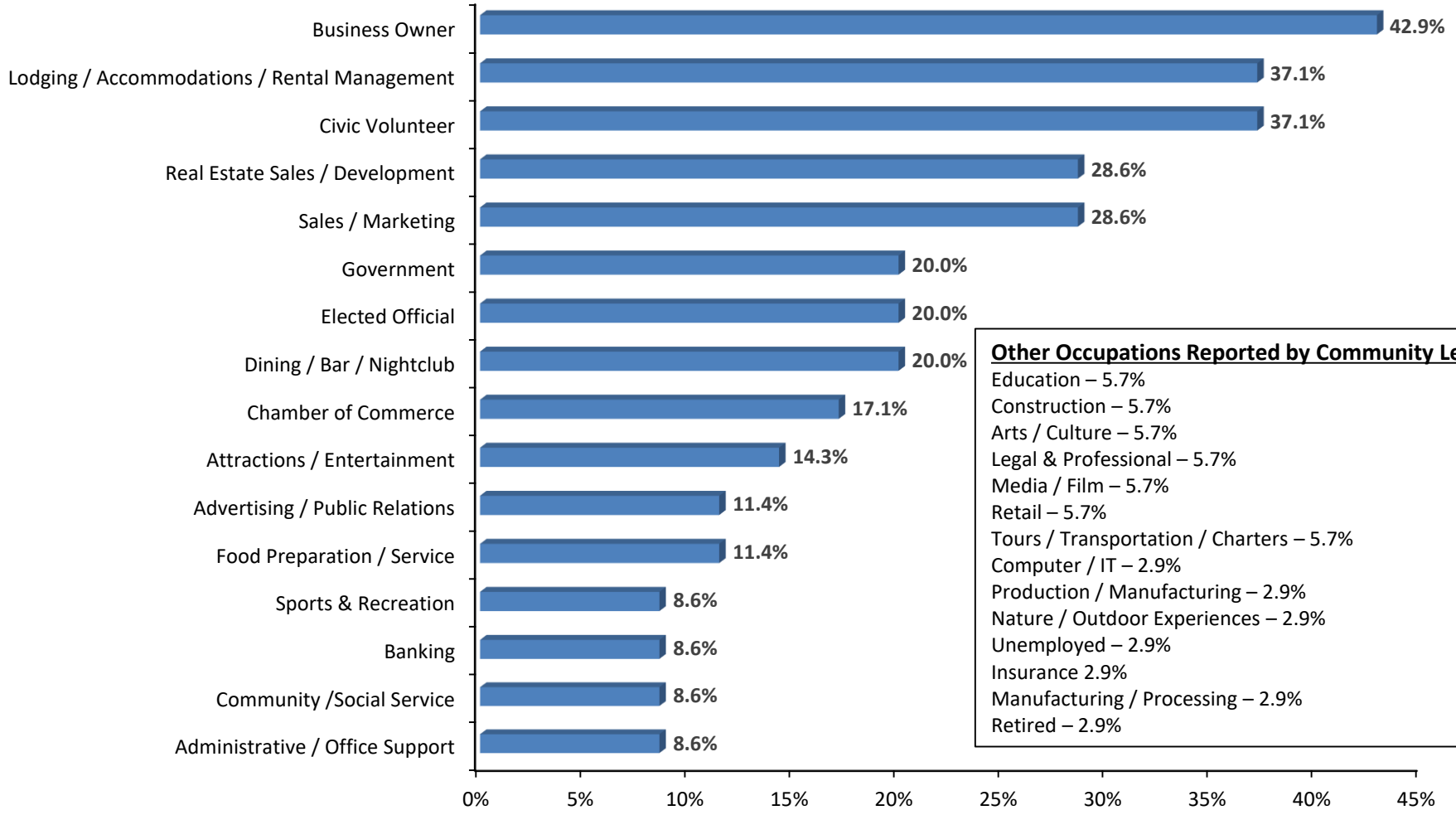


South Padre Island CVB
Resident and Community Leader

Community Leader Occupation

Observations:

- A good cross section of community leaders completed the survey as the graph below indicates.



Other Occupations Reported by Community Leaders:

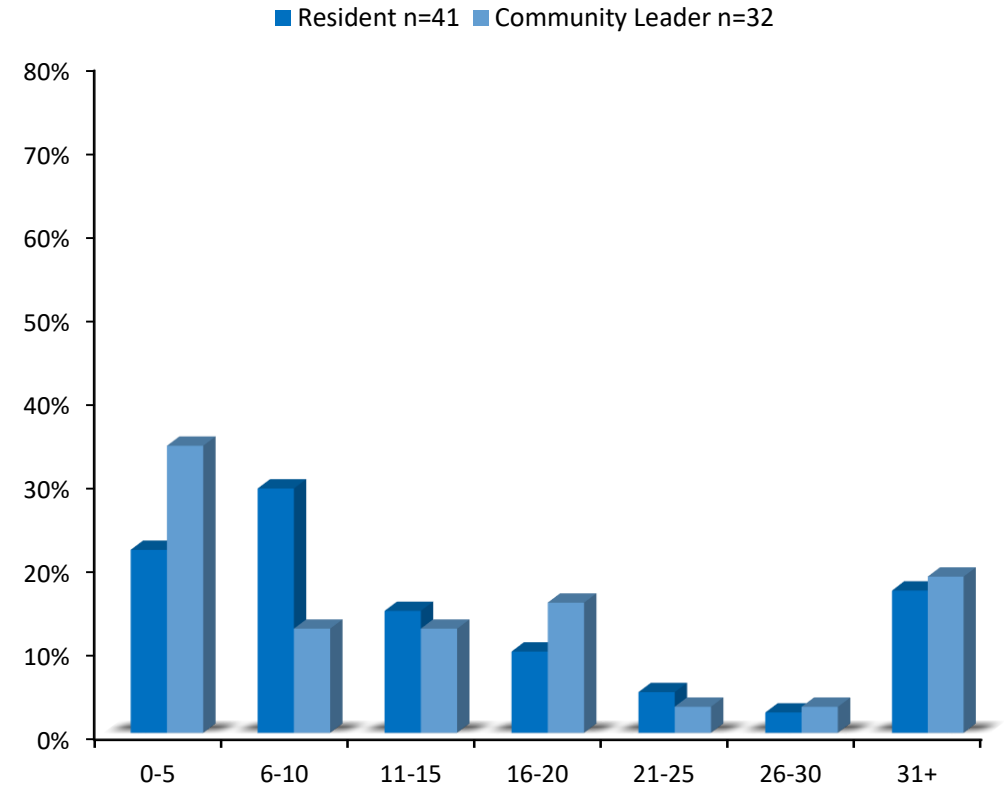
Education – 5.7%
Construction – 5.7%
Arts / Culture – 5.7%
Legal & Professional – 5.7%
Media / Film – 5.7%
Retail – 5.7%
Tours / Transportation / Charters – 5.7%
Computer / IT – 2.9%
Production / Manufacturing – 2.9%
Nature / Outdoor Experiences – 2.9%
Unemployed – 2.9%
Insurance 2.9%
Manufacturing / Processing – 2.9%
Retired – 2.9%

Guests Hosted

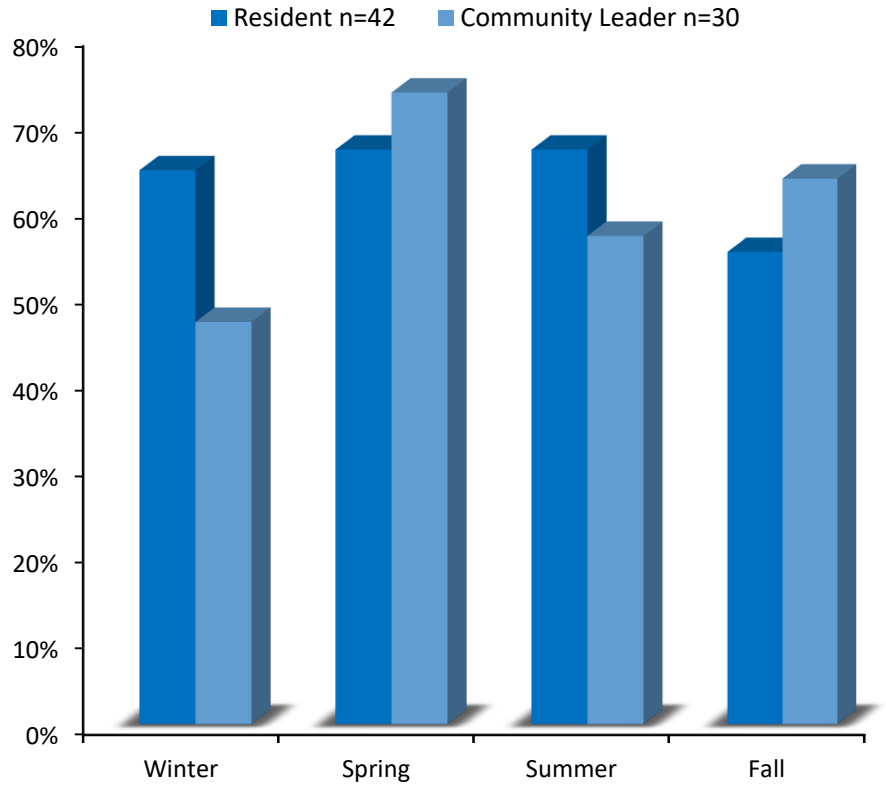
Observations:

- The majority of Residents (51.3%) report hosting between 0 – 10 guests annually while Community Leaders (59.4%) report hosting between 0 – 15 guests annually.
- Both segments report guest visit all four seasons of the year.

Please estimate the TOTAL number of overnight guests you hosted in your home last year.(Count each guest, each time they visit. i.e. Uncle Bob came on three separate visits = 3 guests. Enter as a number, do not include words)

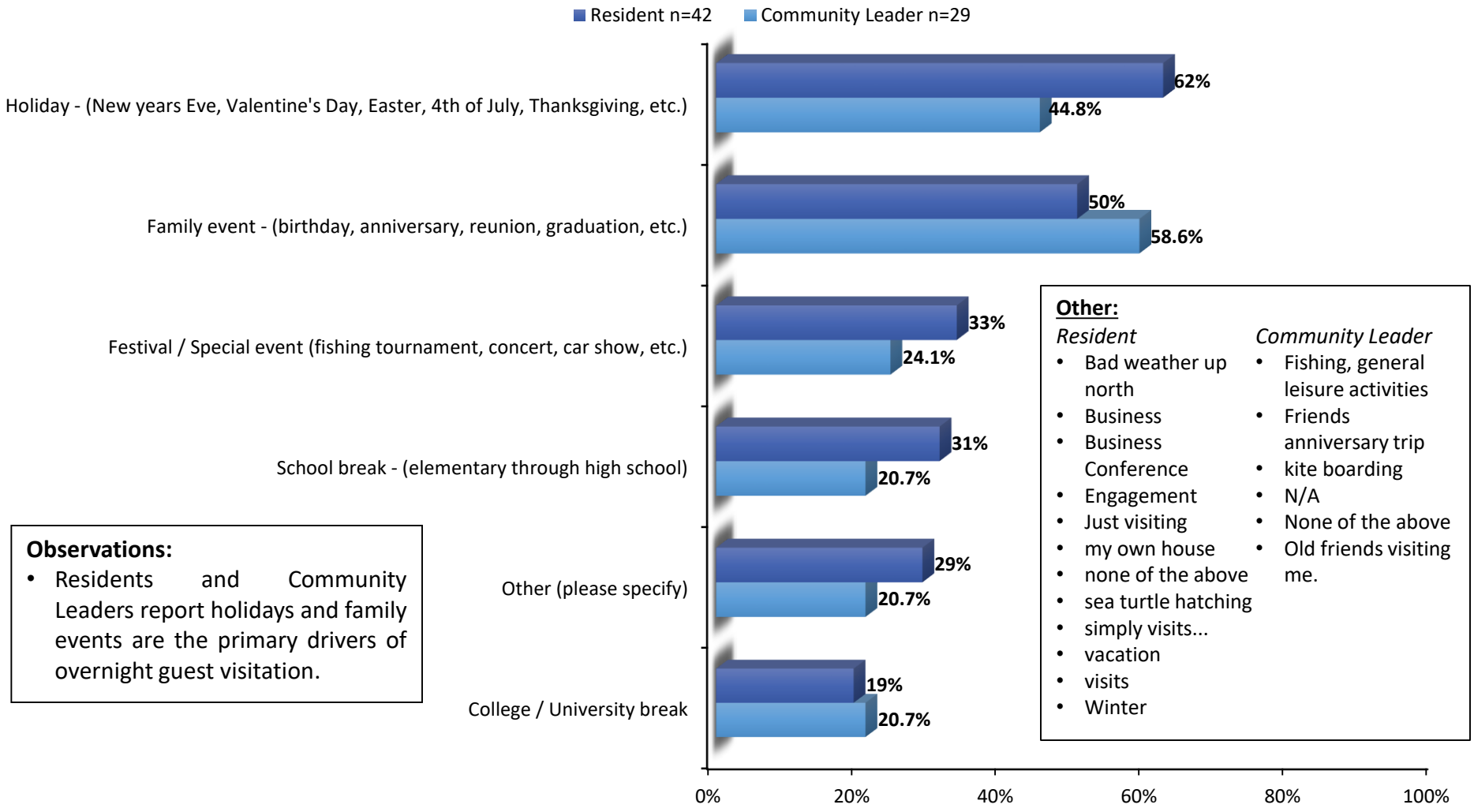


Think about the overnight guests who visited you in the prior 12 months. What season(s) did they visit? (Check ALL that apply)



Motivation for Guest Visit

Regarding those overnight guests who visited you in the last year, was the timing of the visit related to any of the following from the list below: (Check ALL that apply)



Other:

Resident
- Bad weather up north
- Business
- Business Conference
- Engagement
- Just visiting
- my own house
- none of the above
- sea turtle hatching
- simply visits...
- vacation
- visits
- Winter

Community Leader
- Fishing, general leisure activities
- Friends anniversary trip
- kite boarding
- N/A
- None of the above
- Old friends visiting me.

Observations:
- Residents and Community Leaders report holidays and family events are the primary drivers of overnight guest visitation.

Visitor Information

Where and how often do YOUR GUESTS look for visitor information (things to do, places to eat, etc.) while visiting you?

Observations:

- Both Resident and Community Leader respondents report their guests obtain visitor information primarily through general web search's.

Resident n=40	Always	Often	Rarely	Never	Rating Average
General search (laptop, smart phone, tablet)	**33.3%**	**43.6%**	15.4%	7.7%	**3.03**
Collect local brochures, maps, etc.	15.0%	40.0%	32.5%	12.5%	2.58
Visit a local visitor information center	7.5%	42.5%	37.5%	12.5%	2.45
Search on visitor content sites (TripAdvisor, Yelp, etc)	5.3%	42.1%	36.8%	15.8%	2.37

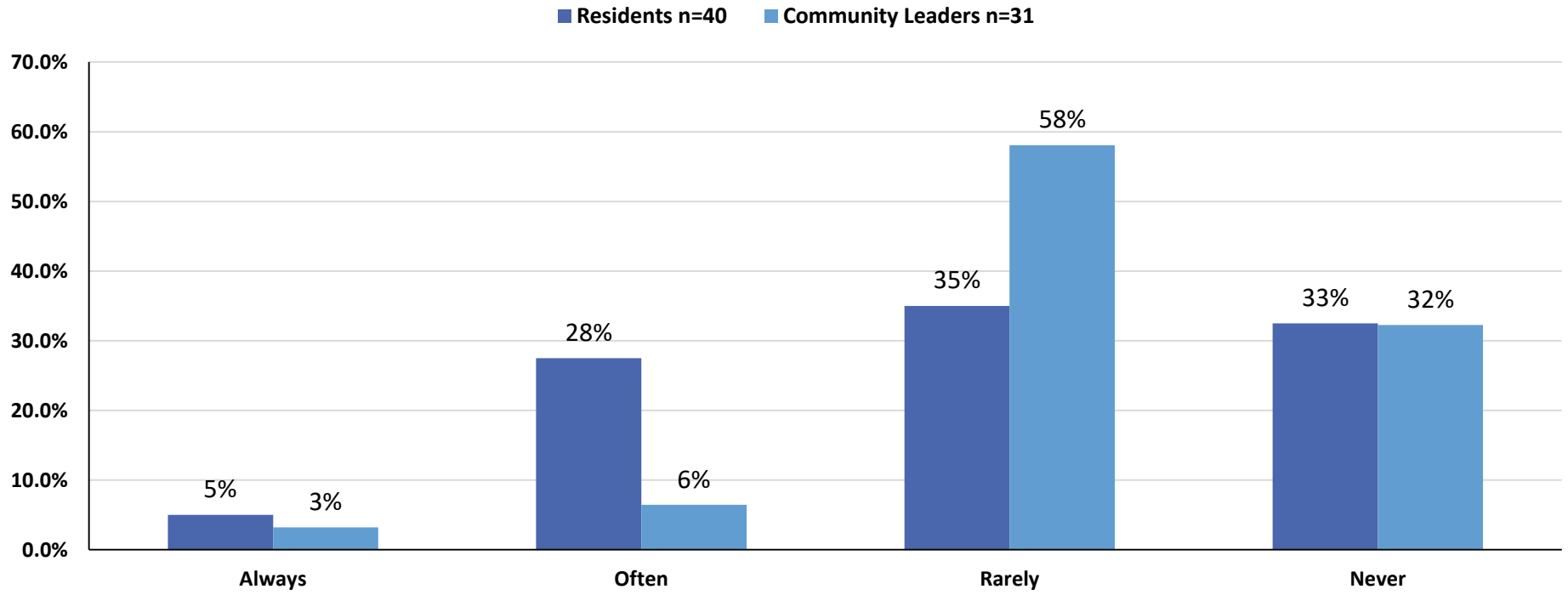
Community Leader n=31	Always	Often	Rarely	Never	Rating Average
General search (laptop, smart phone, tablet)	**35.5%**	**48.4%**	12.9%	3.2%	**3.16**
Search on visitor content sites (TripAdvisor, Yelp, etc)	22.6%	45.2%	19.4%	12.9%	2.77
Collect local brochures, maps, etc.	13.3%	26.7%	50.0%	10.0%	2.43
Visit a local visitor information center	9.7%	25.8%	48.4%	16.1%	2.29

Visitor Center

How often do you TAKE YOUR GUESTS to the South Padre Island Visitor Center?

Observations:

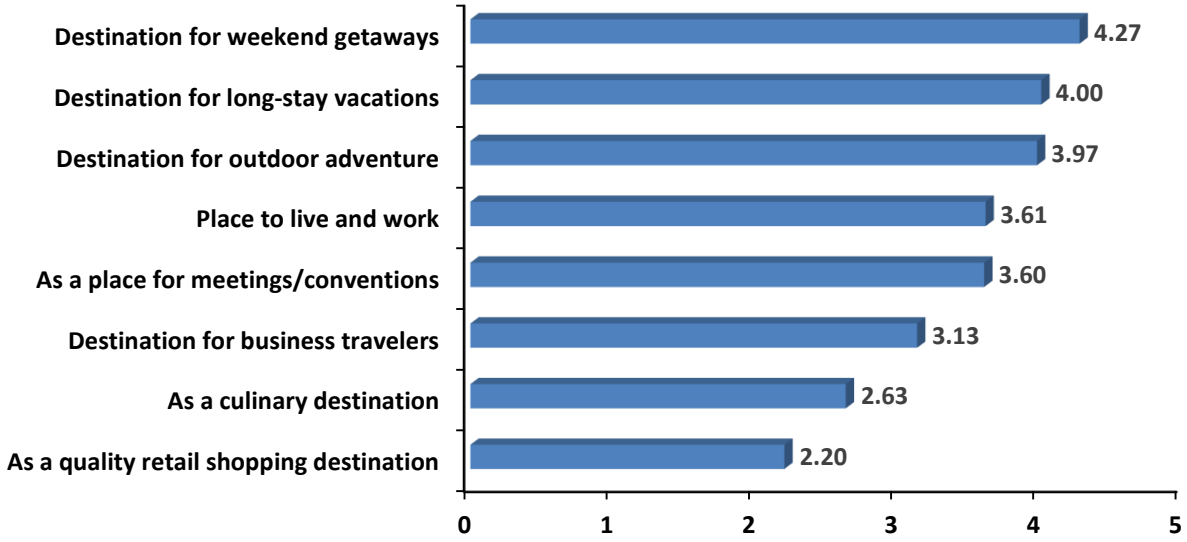
- The majority of Residents (67.5%) and Community Leaders (90.4%) report rarely or never taking their guest to the South Padre Island Visitor Center.



	Always	Often	Rarely	Never
Residents n=40	5.0%	**27.5%**	**35.0%**	**32.5%**
Community Leaders n=31	3.2%	6.5%	**58.1%**	**32.3%**

Community Leader – Current Perceptions

Rate your current perception of South Padre Island as a...(Use the rating scale provided below) n=31



Observations:

- Leaders surveyed rate South Padre Island highly as a destination for weekend getaways, long-stay vacations and outdoor adventures. The graph/chart on this page indicate Community Leaders still think there is work to be done to promote South Padre Island as a destination for retail shopping, culinary experiences and business travelers.

Other Comments:

- Need for "product development" and customer service improvement primary challenges
- We have a shortage of quality restaurants.

	Excellent	Good	Average	Poor	Very Poor	N/A	Rating Average
Destination for weekend getaways	**40.0%**	**46.7%**	**13.3%**	0.0%	0.0%	0.0%	**4.27**
Destination for long-stay vacations	**23.3%**	**60.0%**	**13.3%**	0.0%	3.3%	0.0%	**4.00**
Destination for outdoor adventure	**27.6%**	**48.3%**	**17.2%**	6.9%	0.0%	0.0%	**3.97**
Place to live and work	29.0%	25.8%	25.8%	16.1%	3.2%	0.0%	3.61
As a place for meetings/conventions	16.7%	43.3%	23.3%	16.7%	0.0%	0.0%	3.60
Destination for business travelers	6.7%	33.3%	30.0%	26.7%	3.3%	0.0%	3.13
As a culinary destination	0.0%	16.7%	46.7%	20.0%	16.7%	0.0%	2.63
As a quality retail shopping destination	0.0%	6.7%	36.7%	26.7%	30.0%	0.0%	2.20

Community Leader – Overall Satisfaction

When friends, family or business guests visit you, please rate your level of satisfaction with the following South Padre Island experiences. (N/A indicates you don't take visitors there.) n=31

Observations:

- Community Leaders surveyed rate high satisfaction with South Padre Island outdoor activities, nightlife, zoo and dining experiences. As indicated in the chart below, they report the community needs to work on improving the cultural and museum offerings; parks, golf, and botanical gardens experiences; and unique shopping opportunities.

	Very satisfied	Satisfied	Dissatisfied	Very dissatisfied	N/A	Rating Average
Outdoor Activities (hike, bike, boat, fish, paddleboard, etc.)	**60.0%**	**33.3%**	3.3%	3.3%	0.0%	**3.50**
Nightlife (bars, breweries, live music, etc.)	**22.6%**	**58.1%**	12.9%	0.0%	6.5%	**3.10**
Zoo	**16.7%**	**30.0%**	13.3%	0.0%	40.0%	**3.06**
Dining	**22.6%**	**58.1%**	19.4%	0.0%	0.0%	**3.03**
Cultural activities (concerts, theater, performing arts, etc.)	20.0%	33.3%	26.7%	0.0%	20.0%	2.92
Festivals / Local events	16.7%	50.0%	23.3%	6.7%	3.3%	2.79
State / Local Parks	10.0%	53.3%	13.3%	10.0%	13.3%	2.73
Golf	6.7%	26.7%	23.3%	0.0%	43.3%	2.71
Unique shopping (locally owned Boutiques, shops, galleries)	10.0%	26.7%	40.0%	13.3%	10.0%	2.37
Botanical Gardens	0.0%	20.0%	16.7%	6.7%	56.7%	2.31
Museums (historic, art, and children's)	3.3%	26.7%	26.7%	13.3%	30.0%	2.29

Resident Verbatim

What would make South Padre Island more appealing as a travel destination? n=26

Activities / Attractions (14)

- Better restaurants and attractions (2)
- bikes, walking lanes.
- Great restaurants and boutiques would keep my guests here longer
- Live evening shows, plays, music etc.
- More attractions so my guest have more to do on their visits
- More family friendly events, activities, business conferences, fishing tournaments, sport competitions, etc.
- More kid friendly attractions and activities
- More kid friendly options.
- More promotion of existing and new family activities.
- More things to do: destinations
- More things to see and do - especially if the weather does not permit outside activities
- More things to see and do. Maybe an aquarium? Maybe a family festival with a carnival?
- To make South Padre Island more appealing as a travel destination, there should be more entertainment zones. All businesses should have equal playing fields.

Beautification / Conveniences (6)

- Better citywide landscaping, lots of trees, benches on the beach
- I feel one thing that is needed on the SPI beaches are more rest rooms.
- Maintain our beautiful beaches instead of allowing visitors to trash them.
- More floral and folla
- More organized beach cleanups
- More Trash removal from Beaches

Reputation (3)

- Remove places like Claytons and any others that promote entertainment related to gangs and drugs and sex. It damages our name and out brand.
- The summer crowds in recent years have become undesirable in scale and behavior
- All of the sleazy party crowd at Claytons is a serious blemish to our island
- Parking / Transportation (2)
- Adequate parking, the bus running to Port Isabel later hours even if infrequent
- Better parking. Easier with less time to travel here from the Midwest via airplane
- "more flights to SPI-Brownsville airport"

Miscellaneous

- I just don't like the cones they put for the traffic and the locals have to wait in line to go shopping in town.. but do love the ocean!!
- I think the Spacex launches will be very interesting.
- Phone FAQ app to answer victor questions

Community Leader Verbatim Comments

What would make South Padre Island more appealing as a travel destination? n=29

More / Improved Activities and Restaurants (15)

- Abundance of outdoor activities for adults
- Better restaurants and attractions
- Better shopping and healthier dining.
- Central retail area of nice quality shops and restaurants. Less t-shirt shops. No golf carts on padre blvd.
- Higher end restaurants and shopping, city sponsored events, ie music feats, theme weekends “pirate days”, something for visitors to do during evenings and nights.
- More activities
- More and better restaurants.
- More attractions and better restaurants
- More attractions, shopping, and entertainment
- More climate controlled, family friendly attractions and activity.
- More entertainment.
- More entertainment, more bars, more restaurants, more retail, a true town square or entertainment area.
- More scuba diving attractions.
- "More upscale dining and culinary choices. Better variety of shopping, not more t-shirt shops. Art, more variety"
- More variety of places to eat, shops, better leadership allowing different types of business.

Air Service / Access (6)

- Better access to island
- Better air service
- Direct flights
- Ease of getting around
- Make is easy to get to the beach.
- The proposed North Causeway and more direct and overall airservice..."

Beautification / Infrastructure (4)

- Beautification
- Better infrastructure. Skate Park. Benches on the beach. Better landscaping. More trees. Bike lanes and boardwalk trails on the bay.
- Continue to expand landscaping to give the Island a more tropical feel.
- Improve infrastructure for the kiters at the flats

New Amenities (3)

- Aquarium
- "more interesting , educational amenities like an aquarium"
- waterpark

Promotion (2)

- Better exposure of the beach, lots of dining options,
- Better information on what is happening when someone is visiting in an easy to access format.

Training / Service (2)

- "Better trained staff in MOST businesses 4 or 5 star hotels/restaurants"
- Friendlier more helpful people

Miscellaneous (4)

- Affordability
- Calmer spring breaks (reputation).
- Complete absence of 25 to 35 year old single travelers.
- n/a

Community Leader Verbatim

What do you see as the biggest obstacles to promote South Padre Island as a destination for leisure getaways, business or groups? Target markets, methods to promote, etc.(If possible, please list in bullet points) n=28

Access / Air Service (25)

- Access-another Causeway and enhanced airlift
- air transportation
- Air travel $ and schedules are awful
- Airfare has gotten outrageous
- airlift
- Airlift and high fares
- airport distance
- Difficult to access (no direct flights)
- Distance from airport
- Distance from major metropolitan areas
- distance from metro areas
- expensive air travel
- flights are expensive and too many connections
- Geographical location
- inbound traffic flow on Highways 100 & 48
- Lack of air
- lack of flights
- Long distance for travel
- Prices to fly to SPI are high
- Remoteness
- resources on transportation alternatives while visiting (other than car)
- Single road access
- to remote
- Too far away from population centers
- traffic at peak times, need new causeway

Attractions / Activities (18)

- Better fine dining
- Indoor attractions
- lack of 5 star or all inclusive hotel
- Lack of activities and entertainment when beach is not an option.
- Lack of attractions
- lack of beach activities
- Lack of city sponsored events
- Lack of high end branded hotels
- lack of shopping
- Lack of sporting events, beach volleyball, basketball tournament, surf or kite board events, etc.
- More cultural activities
- more things to do
- Need more family-friendly activities
- Need to sell beverages/snacks on the beach
- Quality restaurants
- Quality shopping
- up to date resources on ecotourism activities
- very slim activities after 2 or 3 days

Community Leader Verbatim

What do you see as the biggest obstacles to promote South Padre Island as a destination for leisure getaways, business or groups? Target markets, methods to promote, etc.(If possible, please list in bullet points) n=28

Marketing / Promotion (13)
- Advertising (3)
- Better Marketing to groups and vacationers
- Birding and Nature Publications
- Comprehensive source for a variety of activities
- How to target singles/couples w/o kids in fall/spring
- Lack of out of state advertising
- Marketing to the state in major cities
- Retirement Publications
- Saltwater Publications
- Statewide awareness of the destination: A lot of people are not aware of our destination. It gets confused with North Padre. Need better Marketing.

Reputation (4)
- Bad image "Party Town"
- Bad reputation (Spring Break)
- Party Reputation
- Spring break reputation

Venue / Meeting Space (4)
- convention space / hotel size
- Larger venue for concerts
- Limited convention space
- meeting space

Service / Hospitality (2)
- Customer service and friendliness of locals is poor
- Overall customer service/hospitality mindset

Seasonality (2)
- too seasonal
- Too seasonal. Little off-season variety

Miscellaneous
- Affordability
- a major development that would get national attention
- Better look/landscaping of the streets and Padre Blvd
- Leadership
- Name Recognition
- need more industries besides tourism
- Small minded people who want to remain small
- Trashy young valley people
- Visitors spending more money

Community Leader

What words would you use to describe South Padre Island to a friend or colleague who has never been to South Padre Island? (Please list single words or short phrases) n=30

Community Leader

Do you have any thoughts, suggestions or ideas related to promoting South Padre Island as a destination we have not covered? n=23

- "Increases festivals and events budget to create more one of a kind, unique off-season events.
- Continued infrastructure improvement to add charm, sense of place and unique attractiveness to SPI for year round visitors.
- Nail down true cruise ship potential
- and make it happen if the ROI is substantiated as highly valuable to
- the destination..."
- A more complete awareness of everything we have available to promote to our visitors. As staff and ad agencies come and go it seems that influences and "pet projects" become the focus and we forget about other activities, events, sights, etc. Sometimes it is our "hidden" treasurers that are of most interest. Besides the general vacation experience, visitors also seek out the "local experience". Been seeing some improvements recently but more is needed.
- Better marketing to travelers-airports, TripAdvisor/Expedia etc. Use events as a marketing tool - must have more events to do that.
- Bring cruise ships to make year-round destination.
- Combining the Port Isabel and the SPI Chambers would better promote SPI as a destination. All of the events the Port Isabel Chamber puts on benefits SPI more than P I. Why not combine the talent we have on both chambers to become even better. The city and EDC from both cities should help.
- Continue partnerships with neighbors to get broader exposure.
- Encourage/host more Texas-based activities (music festival with Texas talent; wine festival with Texas wines; etc). Need more family friendly attractions.
- Focus on fun entertainment and not just heads in beds. Get folks here and they will stay.
- Go to more out of state markets
- Increase advertising in south Texas market
- more aggressive sales/marketing during shoulder seasons
- More families needed at Spring Break. Need to find a way to decrease negative publicity about this "wild" place
- More media coverage out of the local area to encourage higher income visitors to support our local businesses year around ... TV ads in major cities across Texas
- n/a
- need to distinguish us from corpus
- No (2)
- Shoulder weeks of spring break is a big opportunity.
- Strategic brand transformation that is data driven
- Target the easy markets that are drivable. Austin San Anton Laredo and Houston as well as Monterrey. That should be 90% of focus for adult market. Encourage shoulder week "yankees" college students in march as they come back as adults stop treating them as a given and as 2nd class tourists
- Venues that do not attract criminally minded individuals or gangs. More facilities like Schlitterbaun for families and venues like the Birding Center and turtle rescue center for people interested in nature and ecology.
- Work with local Airlines for Package trips
- You need to find a retirement home company to build a state of the art facility here. We have a mine that isn't being utilized, great weather and all the winter Texans who are like gold. More events like a metal detecting contest, sponsor a contest and you will get thousands of new people from all over the world to visit. Summertime music festivals. An state of the art Aquarium, a boardwalk with shops and fishing and viewing areas. A large marina to attract larger ships for the fishing that our artificial reef is going to bring in.

Resident and Community Leader – Summary of Survey Response Data

- **50 respondents identified as South Padre Island residents and 38 respondents identified as Community Leaders** in the survey.
- **The majority of Residents (65.9%) and Community Leaders (72.7) report residing in South Padre Island 11+ years.**
- **58.3% of Community Leaders report being active in community affairs for 11+ years**
- The **majority of Residents (51.3%) report hosting between 0 – 10 guests annually** while **Community Leaders (59.4%) report hosting between 0 – 15 guests annually.** Both segments report the timing of overnight visitors is associated with holidays and family events.
- **Community Leaders surveyed rate South Padre Island highly as a destination for weekend getaways, long-stay vacations and outdoor adventures.**
- **Community Leaders surveyed rate high satisfaction with South Padre Island outdoor activities, nightlife, zoo and dining experiences.** They also report the community needs to work on improving the cultural and museum offerings; parks, golf, and botanical gardens experiences; and unique shopping opportunities.

South Padre Island CVB
Image & Awareness Survey

YOUNG strategies, inc.
fresh. travel. research.

Methodology

An online survey instrument was prepared by the Young Strategies research team and was distributed to a panel of pre-certified travelers who met specific demographic guidelines that align with typical South Padre Island visitors. The survey was distributed to 4,021 people who were asked a series of pre-qualification questions in order to participate in the survey. Pre-qualification questions were based on travel behavior criteria of the respondents such as:

- have taken a vacation of at least two nights in the last two years
- must be between the ages of 25 and 74
- have a household income over $25,000 per year
- must travel to beach destinations frequently and reside in the target geographic area in order to participate

In addition to these pre-qualifications respondents were sought from the following cities that are feeder markets for South Padre Island:

- Texas: Dallas Fort Worth (250); Austin (250); Houston (250); San Antonio (250)
- Other Cities (100 each): Denver, Wichita, Oklahoma City, Omaha, Minneapolis/St Paul, Chicago, Kansas City, St Louis, Detroit.

A total of 2,053 respondents qualified to complete the survey based on this criteria.

Demographics	Texas n=1,061	All Others n=992
Generational Group		
24 and under	0.0%	0.0%
25-34 years old	22.8%	21.0%
35-44 years old	20.8%	22.1%
45-54 years old	21.0%	21.2%
55-64 years old	20.4%	21.8%
65-74 years old	15.0%	14.0%
75 or older	0.0%	0.0%
Gender		
Female	53.5%	50.5%
Male	46.5%	49.5%
Occupation	Retired – 21.7%	Retired – 18.8%
	Healthcare industry – 10.6%	Education/Professor/Teacher – 10.1%
	Education/Professor/Teacher – 9.9%	Healthcare – 9.8%
	Administrative/Office Support – 7.8%	Administrative/Office Support – 8.3%
	Computer / IT – 6.9%	Computer / IT – 7.3%
Income		
$0 - $49,999	15.9%	13.4%
$50,000 - $99,999	37.4%	39.5%
$100,000 - $199,999	34.9%	37.4%
$200,000 - $299,999	8.0%	6.8%
$300,000 +	3.9%	2.9%
Ethnicity		
White / Caucasian	73.5%	84.1%
Hispanic or Latino	11.5%	2.8%
Asian or Pacific Islander	8.9%	7.0%
Black or African American	8.3%	6.2%
American Indian or Alaskan Native	1.8%	1.7%
Prefer not to answer	1.2%	0.8%
Relationship Status		
Married / in a domestic partnership	69.8%	71.1%
Single, never married	21.4%	20.6%
Single, but cohabiting with a significant other	8.8%	8.3%

Observations: The survey methodology was designed to reach people who have high potential to visit South Padre Island.

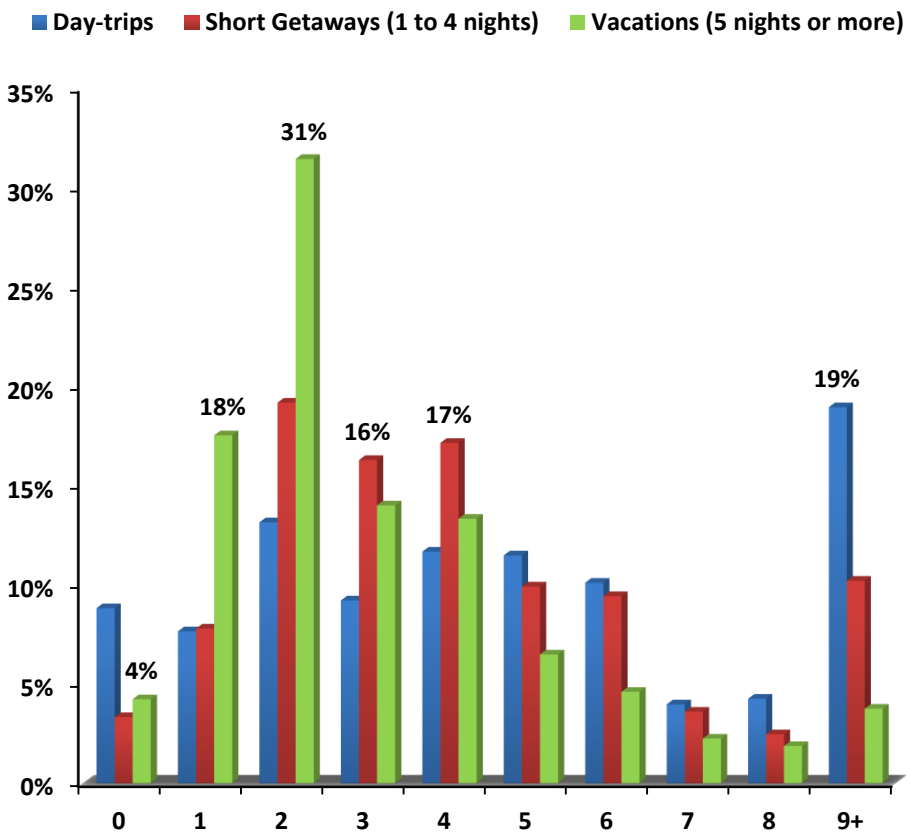
- Survey data represents a broad range of ages with a fairly even split between male and female respondents.
- Retired, education and healthcare were the most prevalent occupations.
- Approximately half of respondents have income under $100K and half above $100K.

Annual Leisure Trips

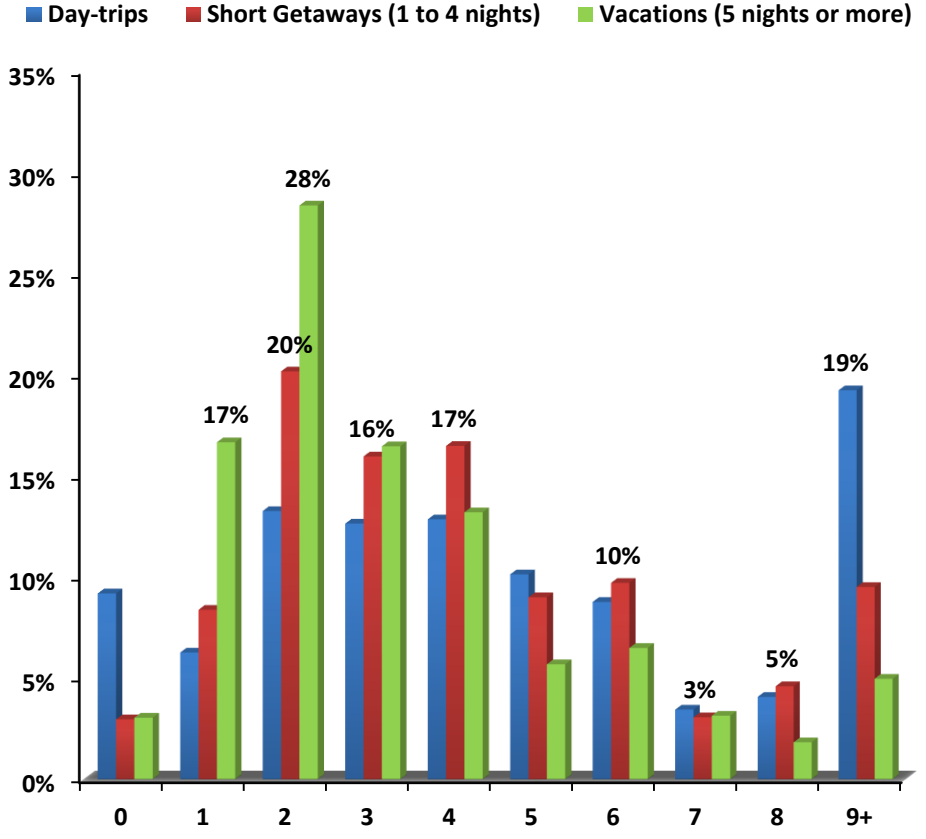
Observations: Respondents were pre-qualified to take the survey and must have taken at least two trips a year for the last two years. This approach assured that survey respondents have the potential in terms of time and money to take a trip to South Padre Island. The data in the charts below reveals that respondents from Texas (SPI's top feeder market) and the other nine metro areas take many trips a year.

Please estimate the average annual number of leisure travel trips you have taken in the last two years. Trips are defined as more than an hour from home. Estimate the number of trips you have taken annually.

Texas
n=1,061



All Others
n=992

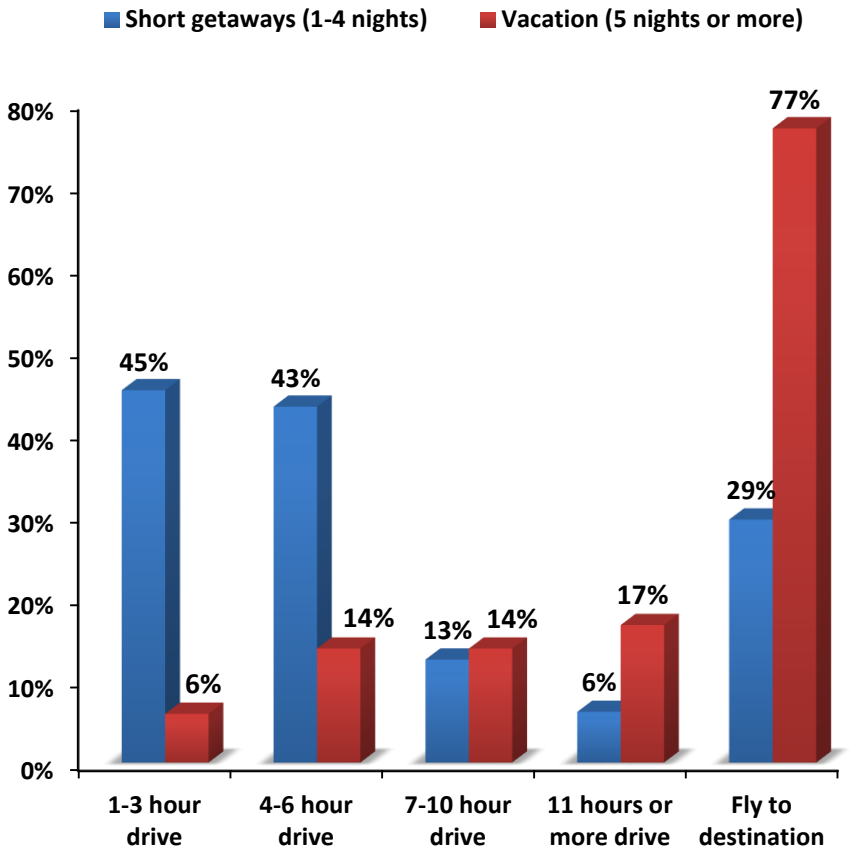


Travel Times

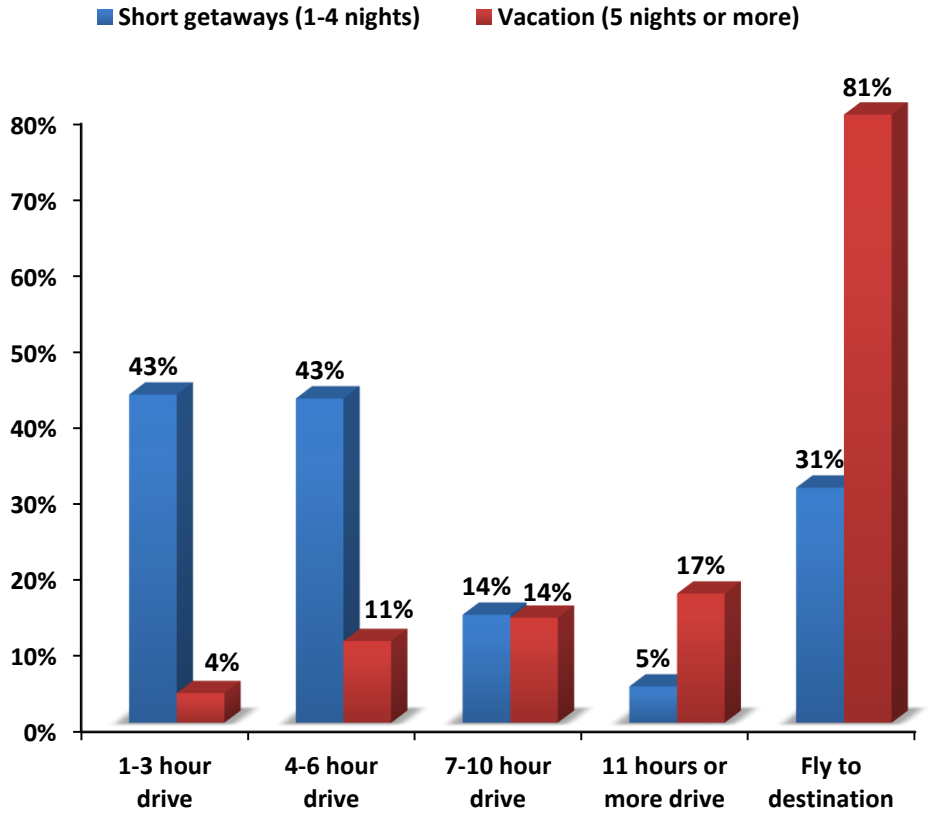
Observations: When asked about distance that people will drive and fly for leisure travel the responses are remarkably similar among Texans and non-Texans. More than three-fourths of respondents indicate they will fly for a vacation of five nights or more and just less than 1/3 will fly for a shorter getaway. A combined 80%+ will drive for trips to destinations within a six hour drive.

How far do you TYPICALLY travel for leisure getaways or vacations?

Texas
n=1,061



All Others
n=991

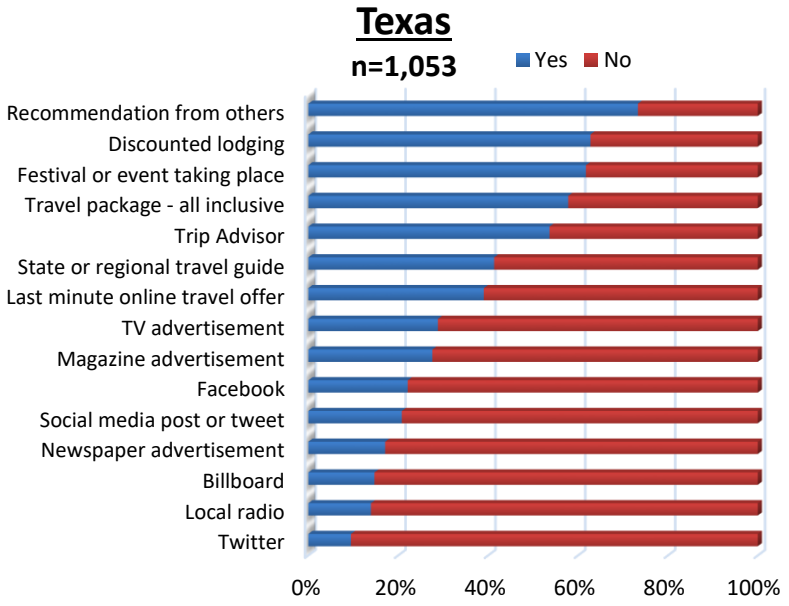


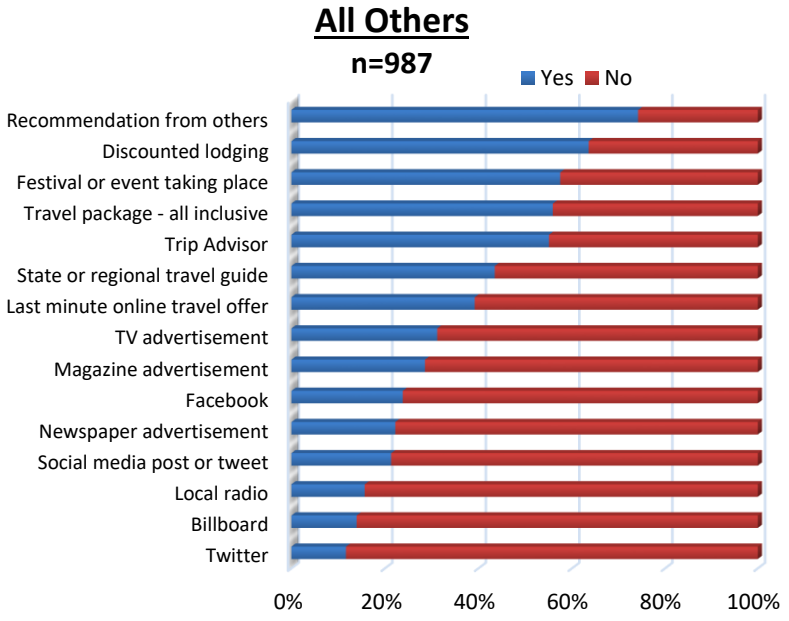
Sources That Influence

Observations: When asked what sources influence travel decisions more than half of respondents cited recommendations from friends, discounted lodging, festival or events, travel packages and Trip Advisor.

Please tell us if any of the following influence your selection of a destination when planning any overnight leisure trip. (Page 1 of 2)

	Yes		No	
	Texas n=1,053	All Others n=987	Texas n=1,053	All Others n=987
Recommendation from others	**73.3%**	**74.2%**	26.7%	25.8%
Discounted lodging	**62.8%**	**63.6%**	37.2%	36.4%
Festival or event taking place	**61.8%**	**57.5%**	38.2%	42.5%
Travel package - all inclusive	**57.8%**	**55.9%**	42.2%	44.1%
Trip Advisor	**53.7%**	**55.1%**	46.3%	44.9%
State or regional travel guide	**41.3%**	**43.5%**	58.7%	56.5%
Last minute online travel offer	**39.1%**	**39.2%**	61.0%	60.8%
TV advertisement	**28.8%**	**31.2%**	71.2%	68.8%
Magazine advertisement	**27.6%**	**28.6%**	72.4%	71.4%
Facebook	**22.1%**	**23.8%**	77.9%	76.2%
Social media post or tweet	**20.8%**	**21.3%**	79.2%	78.7%
Newspaper advertisement	17.1%	22.2%	82.9%	77.8%
Billboard	14.7%	14.0%	85.3%	86.0%
Local radio	13.9%	15.7%	86.1%	84.3%
Twitter	9.5%	11.7%	90.5%	88.3%





Sources that Influence

Please tell us if any of the following influence your selection of a destination when planning any overnight leisure trip. (Page 2 of 2)

Texas n=58

- AAA; AAA offers (2)
- Cartoon
- Children/grandchildren
- Choose a few ideas and pick one
- Cruise special offered by cruise line or travel agent; cruise website (2)
- Deals
- Decision made after researching
- Email
- Expedia
- Familiarity with the area
- Family decision
- Family event
- Family recommendation (2)
- Food and travel channels
- Friend recommendations
- Friend wants to go with me
- Friends/family
- Groupon
- I also use Fodors, Frommers and international travel
- Instagram
- Internet search
- Just pick a place
- Just places I've always wanted to go
- Low airfare
- My preference
- None (3)
- Online search
- Past trips
- Personal choice
- Personal interests
- Places I want to go.
- Previous visits, meeting up with friends
- Somewhere we've wanted to go
- Sun city travel groups
- Time share; timeshare companies; timeshare locations; timeshare offers (5)
- To see someone we know
- Tour companies
- Travel agent (4)
- Travel club in our community and time-share locations available where we'd like to go.
- Travel website recommendations
- Visit family and friends; visit family around USA; visit family (3)
- Word of mouth - someone I know talking about a vacation they took; story that I read about a location
- YouTube

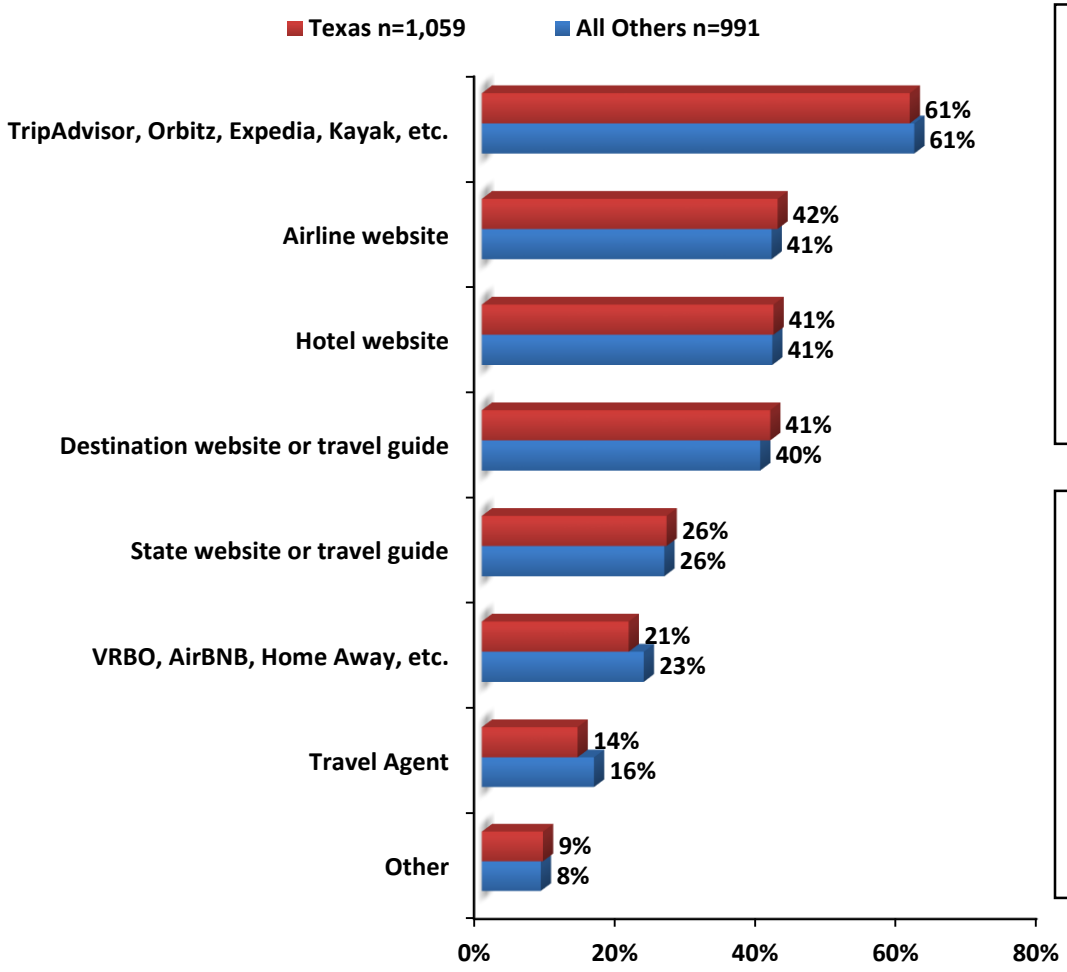
All others n=52

- Adventure travel
- Airbnb
- Annual trip with family
- Area or region of a business trip
- Booking.com
- Direct mail offer
- Visit family and relatives (5)
- visit friends
- Want to see family
- Weather
- Word of mouth
- YouTube video
- Do not take overnight trips. All trips are a minimum of a month or longer.
- Expedia
- Family events and travel agent
- Family; family recommendation; friends and family; friends and relatives; relatives (8)
- Food
- Holiday
- Internet
- Know the place
- Knowing someone at the destination
- Location of friends or family
- Marriott vacation club owner
- Myself
- Nat geo
- None; nothing (2)
- People I want to visit, events I want to attend
- Previous vacations
- RCI
- Reading in general
- Repeat trips to places I know
- Singlescruise.com
- Somewhere never been before
- Time share resorts
- Timeshare location
- Timeshare suggestions
- Travel agent or hotel website
- Travel agent recommendations

Travel Planning Sources

Observations: Here we see very little difference in the planning preferences of Texans and non-Texan survey respondents. As is the current trend in travel planning we see nearly two-thirds of respondents preferring to use rating & booking sites such as TripAdvisor, Orbitz, Expedia, etc. There is a trend toward travel planners preferring user-generated content as they find it to be unvarnished and "real".

What are your preferred sources for vacation / getaway inspiration and planning? (Page 1 of 2)



Other Responses (Texas):

- AAA (3)
- Family & friends (6)
- Friends (6)
- Internet; Internet browsing (3)
- Interval International; Intervalworld.com (2)
- Me; Me and family (2)
- None (4)
- Pinterest (4)
- Time share; Time share publication/website (7)
- Travel club (2)
- Vacation club; vacation club websites (2)
- Word of mouth (3)

Other Responses (All Others):

- Cruise Lines; Cruiseline website (4)
- Family; Family get togethers; Family occasions such as holidays, weddings, funerals (11)
- Friend or family recommendation (2)
- Friends; Friends and lifestyle (4)
- Na/none; nothing (6)
- Personal research; Own research (4)
- Timeshare; Time share resorts; Timeshare destination catalog; Timeshare swap (5)
- Travel Magazines (2)
- Word of mouth (2)

Travel Planning Sources

What are your preferred sources for vacation / getaway inspiration and planning? (Page 2 of 2)

Other (Texas):

- AARP
- All trails
- Ask
- Beach location
- Bucket list
- Car rental
- Dart on a map
- Destination
- Do my own research.
- Family
- Google
- I go where I feel like going
- I like to research what activities are in that region before booking
- I like to see new places
- I plan around foodie joints and wine
- Instagram
- My mind
- My own desires
- My own preference
- My preferences for peace and quiet.
- newspaper or magazine article
- Our daughter does it all
- Places I want to visit
- Priceline.com
- Proximity to family
- Recommendations
- Reddit
- Seminars at Sun City
- Southern Living Magazine or online
- Tour companies
- Travel blogs
- Travel magazines
- Travel sections in various publications
- TV
- Where I went to go and explore especially if there's a beach in the area
- Where we haven't been before or where we have had a good time before.
- Wyndham Resorts
- YouTube videos of location

Other (all others):

- Adventure travel company website
- Advice from friends
- Apple vacation
- Booking.com
- Diamond resorts
- Different continents
- Disney; Disney friends; Disney vacation club; Disney website (4)
- Email deals
- Family and friends
- Global vacations
- Goodsam, recreation.Gov, reserveamerica
- Google search around an attraction or city
- Groupon
- Have destination in mind
- Holidays
- I know where I want to go
- Internet surfing
- Know the place
- Marriott destinations club
- Me
- My family
- My fiancé and I pick the destination. Mostly my fiancé.
- My past
- My travel club membership & friends
- My wife
- Myself
- Online ads
- Our cabin
- Overseas adventure travel
- Own experience
- People I want to visit, events I want to attend
- Personal preference
- Previous experience
- Tourist chamber of commerce
- TravelZoo
- Trivago
- US triathlon association events, cruise research
- Vacation property
- Vacations to go
- We select our destination ourselves, where we want to go

Appealing Attributes of a Beach Destination

Observations: It should come as no surprise that the beach is the single most important attribute when travelers are selecting a beach destination. It is interesting to note the similar rank order of the responses from Texans and non-Texans. Hotel accommodations ranked highly followed by nature/wildlife experiences which reflects a natural trend toward engagement with outdoor experiences.

How important are the following attributes when you are selecting a beach destination? (Page 1 of 2)

Texas n=1,061	Very important	Important	Less important	Not important	Weighted Average
Beautiful beach	**56.8%**	**38.4%**	4.0%	0.9%	**3.51**
Hotel accommodations	**48.6%**	**42.4%**	7.3%	1.7%	**3.38**
Nature/wildlife experiences	**26.3%**	**41.4%**	22.8%	9.5%	**2.84**
Outdoor activities: fishing, kayaking, parasailing, etc.	24.1%	**40.3%**	23.7%	11.9%	**2.77**
Unique dining experiences	19.8%	**44.3%**	26.1%	9.9%	**2.74**
Condo/house rental accommodations	24.5%	**35.0%**	25.0%	15.5%	**2.68**
Fun nightlife	15.4%	**31.5%**	**35.8%**	17.3%	**2.45**
Activities for children	17.1%	18.5%	14.4%	50.0%	**2.03**
RV/Camping parks	7.8%	8.9%	17.7%	65.6%	**1.59**

All Others n=992	Very important	Important	Less important	Not important	Weighted Average
Beautiful beach	**56.9%**	**38.4%**	4.2%	0.5%	**3.52**
Hotel accommodations	**49.5%**	**41.4%**	7.1%	1.9%	**3.39**
Nature/wildlife experiences	**25.3%**	**41.8%**	24.3%	8.7%	**2.84**
Outdoor activities: fishing, kayaking, parasailing, etc.	24.5%	**39.7%**	25.2%	10.7%	**2.78**
Unique dining experiences	19.6%	**43.8%**	27.3%	9.2%	**2.74**
Condo/house rental accommodations	25.4%	**33.5%**	24.5%	16.7%	**2.68**
Fun nightlife	17.9%	**33.5%**	**32.1%**	16.5%	**2.53**
Activities for children	17.3%	21.1%	16.0%	45.6%	**2.10**
RV/Camping parks	6.7%	11.9%	18.0%	63.4%	**1.62**

Attributes of a Beach Destination

How important are the following attributes when you are selecting a beach destination? (Page 2 of 2)

Other (Texas):

- Casino (3)
- Closeness of accommodations to beach
- Clothing optional beaches a plus
- Cultural; cultural (local) experiences; cultural activities (3)
- Fishing
- Golf (2)
- Historic sites (2)
- Historical & cultural places to visit in the area
- Mostly about being with friends and relaxing
- Museum; museums and other similar attractions; museums, galleries, nature walks (3)
- Nearby attractions or historical sites
- None
- Not crowded
- Optional pool
- Other points of interests, i.E., Historical, shopping, etc.
- Pamper-spas-wineries
- Price
- Price/value
- School for fun
- Season
- Shopping (3)
- Somewhere we've never been before
- Time share availability
- Vacation getaway at family home
- Welcome pets

Other (All Others):

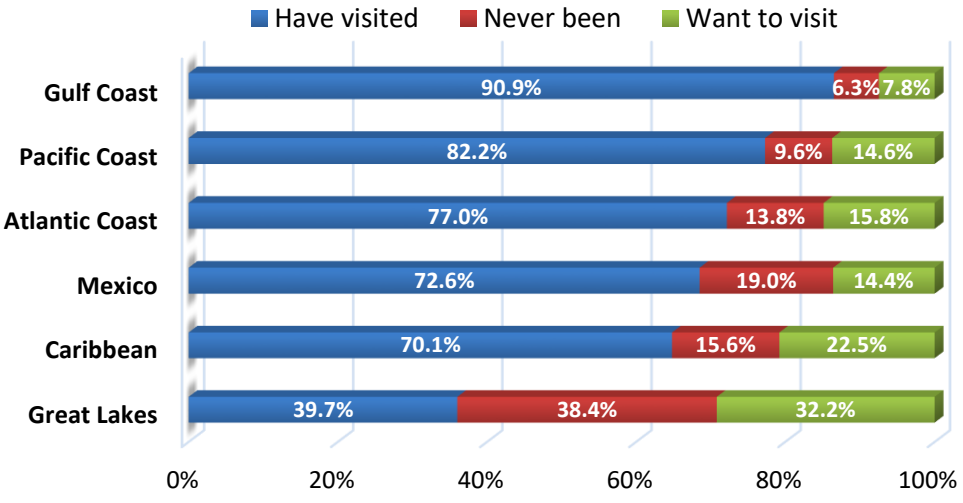
- A nice volleyball court
- Accessible beaches good for walking & safe
- Amusement park
- Arts
- Brewery tours
- Cultural attractions; cultural experience; cultural sites; (4)
- Dump trump
- Easy to get around
- Exploring destination.
- Family and friends
- Gambling
- Golf (5)
- Good food
- Historic sites; historic features; historical activities (i.E. St augustine) (4)
- Museums, art galleries, history
- National parks
- No crowds or cruise ships
- Not too commercial and crowded
- Pokemongo stops
- Safety
- Sightseeing & walking
- Waterparks, pools
- Weather!

Coastal Travel History

Observations: The responses to this question confirm the survey respondents are frequent travelers to coastal destinations. Texans are most likely to have visited the Gulf coast while non-Texan respondents were nearly equally split between the Atlantic and Gulf coasts. More than 80% of all respondents have traveled to the Gulf Coast and are familiar with the region and qualified to answer the remaining questions.

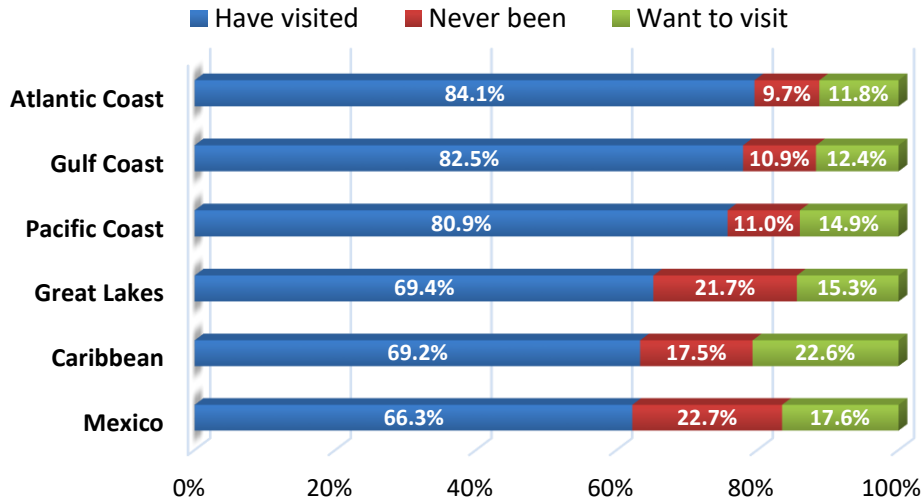
Tell us about your travel history regarding the beach/coastal regions listed below. (Page 1 of 2)

Texas
n=1,061



Texas	Have visited	Never been	Want to visit
Gulf Coast	**90.9%**	6.3%	7.8%
Pacific Coast	**82.2%**	9.6%	14.6%
Atlantic Coast	**77.0%**	13.8%	15.8%
Mexico	**72.6%**	19.0%	14.4%
Caribbean	**70.1%**	15.6%	22.5%
Great Lakes	39.7%	38.4%	32.2%

All Others
n=992



All Others	Have visited	Never been	Want to visit
Atlantic Coast	**84.1%**	9.7%	11.8%
Gulf Coast	**82.5%**	10.9%	12.4%
Pacific Coast	**80.9%**	11.0%	14.9%
Great Lakes	**69.4%**	21.7%	15.3%
Caribbean	**69.2%**	17.5%	22.6%
Mexico	**66.3%**	22.7%	17.6%

Coastal Travel History

Tell us about your travel history regarding the beach/coastal regions listed below. (Page 2 of 2)

Other (Texas)

- Africa, Indonesia
- Asia, Europe, South America
- Costa Rica
- Europe (2)
- Europe, Hong Kong, Singapore
- European Beaches
- Fiji, Vanuatu, Thailand
- France, Thailand, Cambodia, Philippines, St. Kitts, Belize
- Hawaii (6)
- Hawaii And Aruba
- Hawaiian Beaches, Hawaiian Islands, French Polynesia, Greek Islands
- Indian Ocean Coast
- International
- Italian Riviera
- Mediterranean, North Sea, Baltic Sea, Black Sea, Red Sea And Others
- Mediterranean (2)
- Mountain Town
- Philippines
- South Pacific
- US Virgin Islands Visited

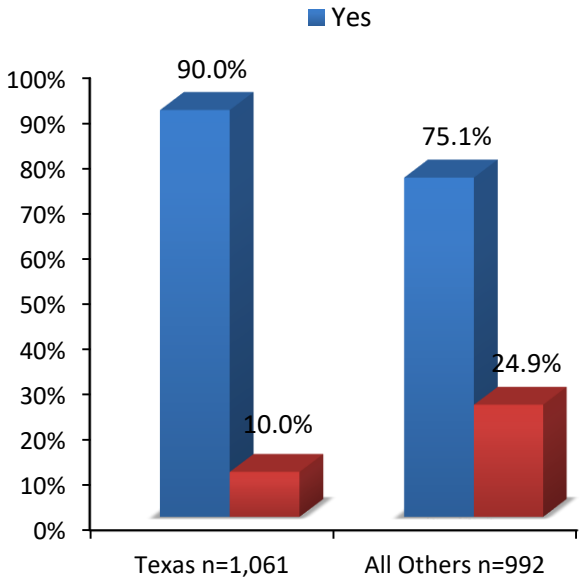
Other (All Others)

- Australia
- Black Hills
- Black Sea
- England
- Europe
- Europe, Asia, Africa
- European, Mediterranean
- Going To Mexico Later This Year
- Hawaii, Japan, Europe, China, Australia
- Hawaii-4; Have Been To Hawaii Many Times (5)
- Israel Mediterranean
- Mediterranean (2)
- Mediterranean And Norway
- Try To Use The Scenic Routes / Drives
- Western Europe

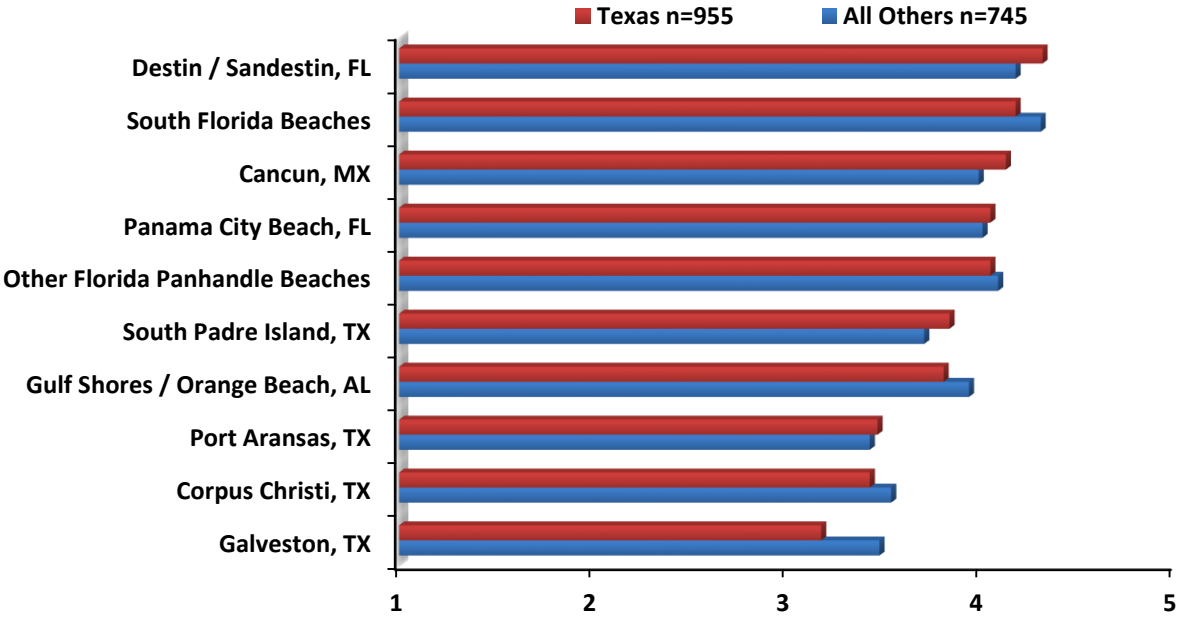
Gulf Coast Visitation

Observations: When asked if they had visited the Gulf Coast in the prior decade 90% of Texans replied yes and 75% of non-Texans replied yes. Those who replied yes were then asked to rate their image/perception of ten popular Gulf destinations. Florida destinations and Cancun rated highest with South Padre Island ranking 6th among Texans and non-Texans. South Padre ranked highest among Texas beach destinations in the list.

Have you been to the Gulf Coast in the last 10 years?



If yes, please rate your image/perception of the following Gulf Coast destinations. Rate each on a scale from 1 to 5, where 5 is outstanding, 3 is average and 1 is poor.

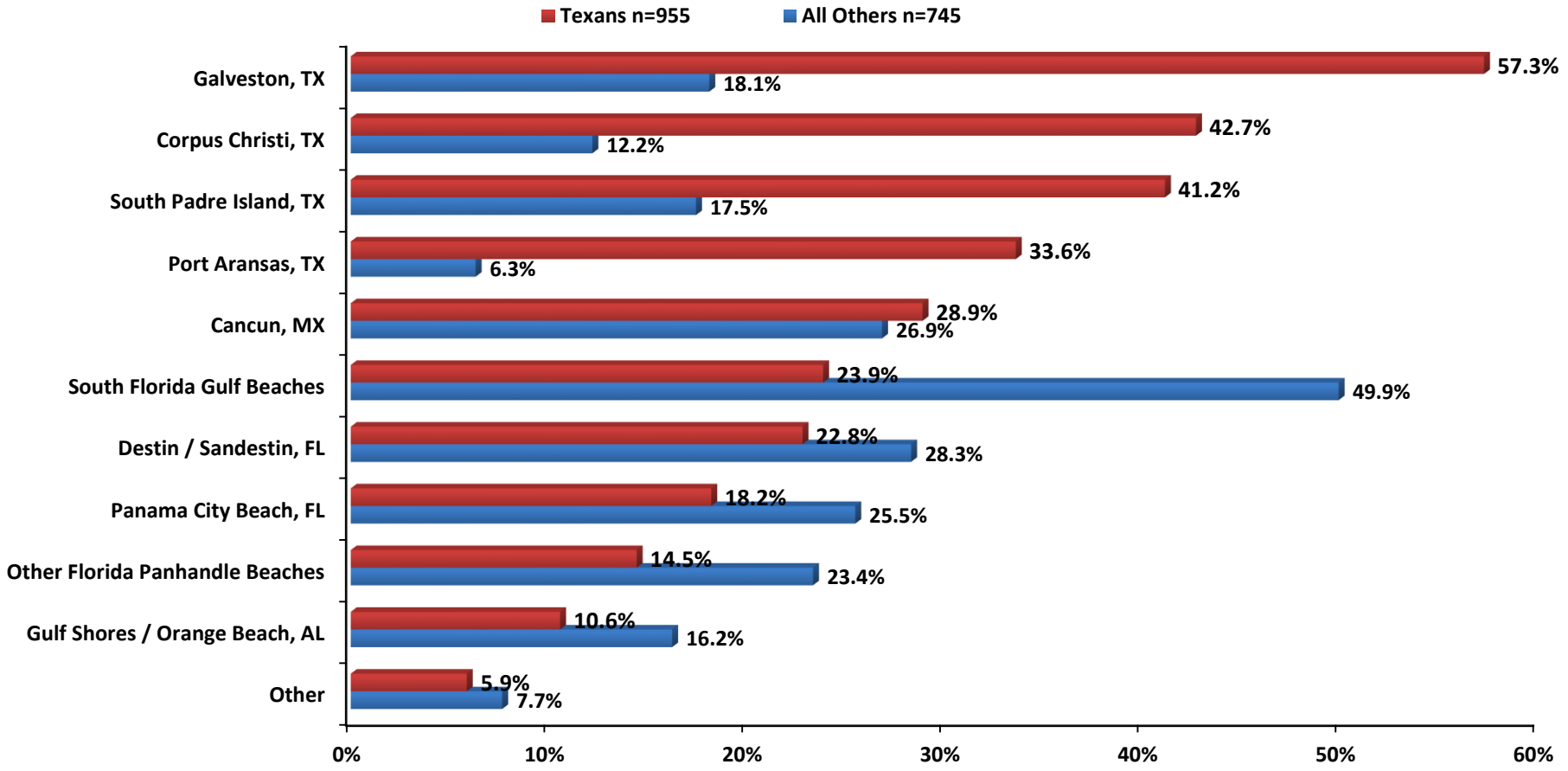


	Texas n=955	All Others n=745
Destin / Sandestin, FL	4.31	4.17
South Florida Beaches	4.17	4.30
Cancun, MX	4.12	3.98
Other Florida Panhandle Beaches	4.04	4.08
Panama City Beach, FL	4.04	4.00
South Padre Island, TX	3.83	3.70
Gulf Shores / Orange Beach, AL	3.80	3.93
Port Aransas, TX	3.46	3.42
Corpus Christi, TX	3.42	3.53
Galveston, TX	3.17	3.47

Gulf Coast Visitation

Observations: Survey respondents were asked to identify the Gulf coast destinations that they typically visit. Among Texan respondents Galveston ranked highest which can be attributed to its closest proximity to the dense population in east Texas. For the same reason Corpus Christi ranked second among Texans but only slightly edged out South Padre Island which is an additional two hour drive beyond Corpus for most Texans. Among non-Texan survey respondents the Florida beaches were visited most often with South Padre in a virtual tie with Galveston for sixth place.

Please indicate which of the following destinations on the Gulf Coast you typically visit. (Select all that apply.) (Page 1 of 2)



Gulf Coast Visitation

Please indicate which of the following destinations on the Gulf Coast you typically visit.(Select all that apply.) (Page 2 of 2)

Other (Texas)

- Alabama / Mississippi Coast
- Anna Marie Island, Naples, FL
- Biloxi, MS (4)
- Cabo San Carlos
- Caribbean
- Carolina beaches
- Caribbean Bahamas, etc
- Clearwater Beach, FL
- Cozumel
- Crystal Beach, Texas. Own a beach house
- Dauphin Island & Florida Keys
- Dauphin Island AL
- Daytona Beach
- Don't typically visit any of these
- Florida Keys, Cozumel
- Ft. Lauderdale, Sunny Ilse Beach
- Gulfport/Biloxi, MS.
- Hawaii (2)
- Jupiter Beach, FL
- Kemah, TX
- Longboat Key
- Maldives
- Mexico Pacific Coast
- Mississippi
- myrtle beach South Carolina
- Naples and Marco Island Florida
- New Orleans (2)
- None
- None are ”typical”
- North Carolina
- North Padre Island, TX
- Outer banks
- port bolivar, TX
- Port o Connor TX
- Puerto Vallarta (2)
- Rockport, TX (4)
- Sanibel island FL
- Sanibel and Captiva
- Sarasota
- SE Florida beaches
- Sea Rim State Park, Texas
- Surfside Beach, TX (2)
- Tampa Bay area
- Typically implies regularly, which is not the case for me
- Venice beach fl

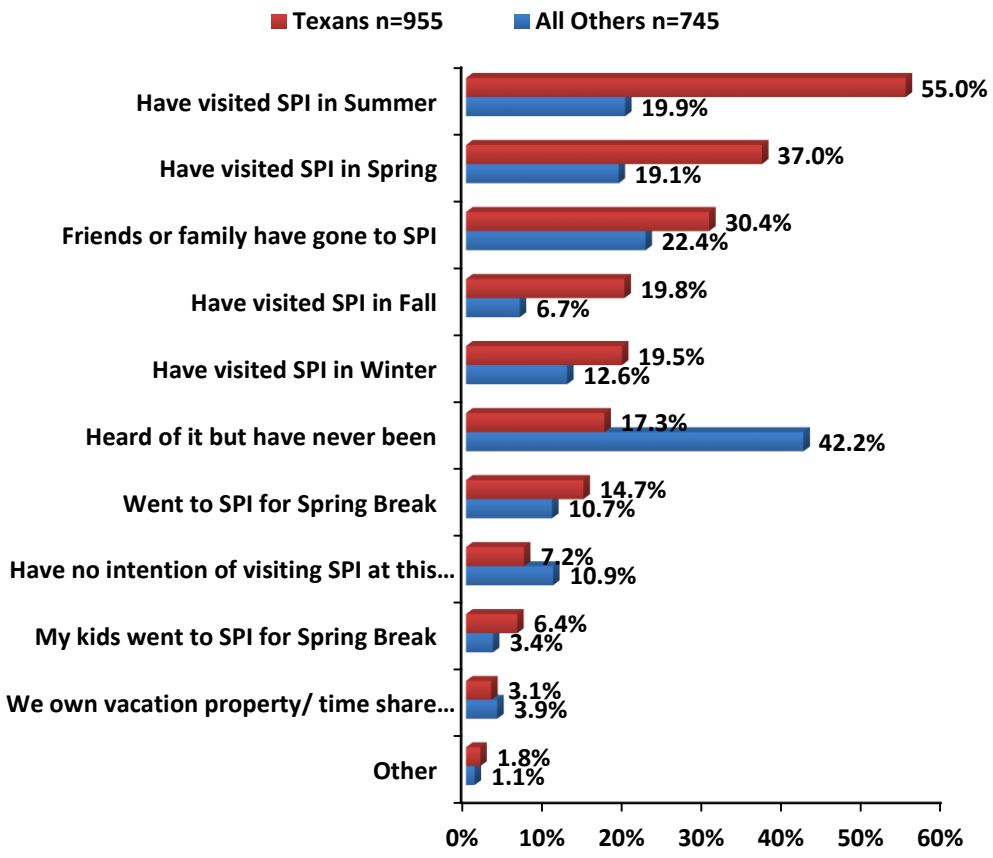
Other (All Others)

- Baja California
- Biloxi, MS (2)
- Cabo MX
- Clearwater, FL (2)
- Cozumel....playa del carma.....morma
- Cozumel, Mexico (2)
- Cuba
- Dump Trump
- Florida Keys (2)
- Fort Lauderdale
- Fort Myers, Florida (2)
- Freeport
- Ft, Meyer area
- Hawaii
- Hawaii, Carribbean
- Indian Rocks Beach
- Key West (2)
- Los Cabo San Lucas
- Louisiana & Texas
- Manasota key Florida
- Marco Island, FL (2)
- Mexico
- New Orleans, LA (5)
- None
- Palacios, TX
- Puerto Vallarta, MX
- San Diego CA
- San Pedro Belize
- San Diego
- Sanibel Island (2)
- Sarasota area
- Sarasota, Fort Meyers, Tampa
- siesta key
- St. Pete Beach, FL (4)
- Tampa (2)
- Tampa Bay
- Tampa, Clearwater
- Tampa/Saint Petersburg
- the Keys
- We try not to go to the same place too often
- West Coast of FL; Louisiana (2)

Knowledge/Experience with South Padre Island

Observations: At this point survey respondents were asked their first question specific to South Padre Island. In all prior questions SPI was one of many destinations mentioned. Herein we see the different types of experience survey respondents have with visiting SPI. More than half of Texans have visited SPI in the summer and more than a third have visited in the spring. It is interesting to note that 17% of Texan respondents have heard of SPI but never visited. Among non-Texan respondents 42% have heard of SPI but haven't visited while the remainder have some type of connection to SPI.

What is your knowledge/experience with South Padre Island (SPI)? (Select ALL that apply)



Other (Texans)

- Been more than two years
- Live there
- Memories of past trips
- n/a
- never been
- Never been but want to go.. a bit of a drive
- Never heard of it
- None.
- Planning a trip next month
- Planning a weekend trip this year
- Prefer off season - definite not Spring Break
- Son attended military academy in nearby city so I went fishing at South Padre Island
- Videos of teenagers parties drunk and Mayor inviting more to come visit:-(
- Went for a conference, stayed couple extra days

Other (All Others)

- Have not been, but would like to know more.
- Have not heard of, but want to visit
- Never been here
- Went there years ago
- Went when I was little

What Words Come to Mind When You Think of South Padre Island - TEXANS

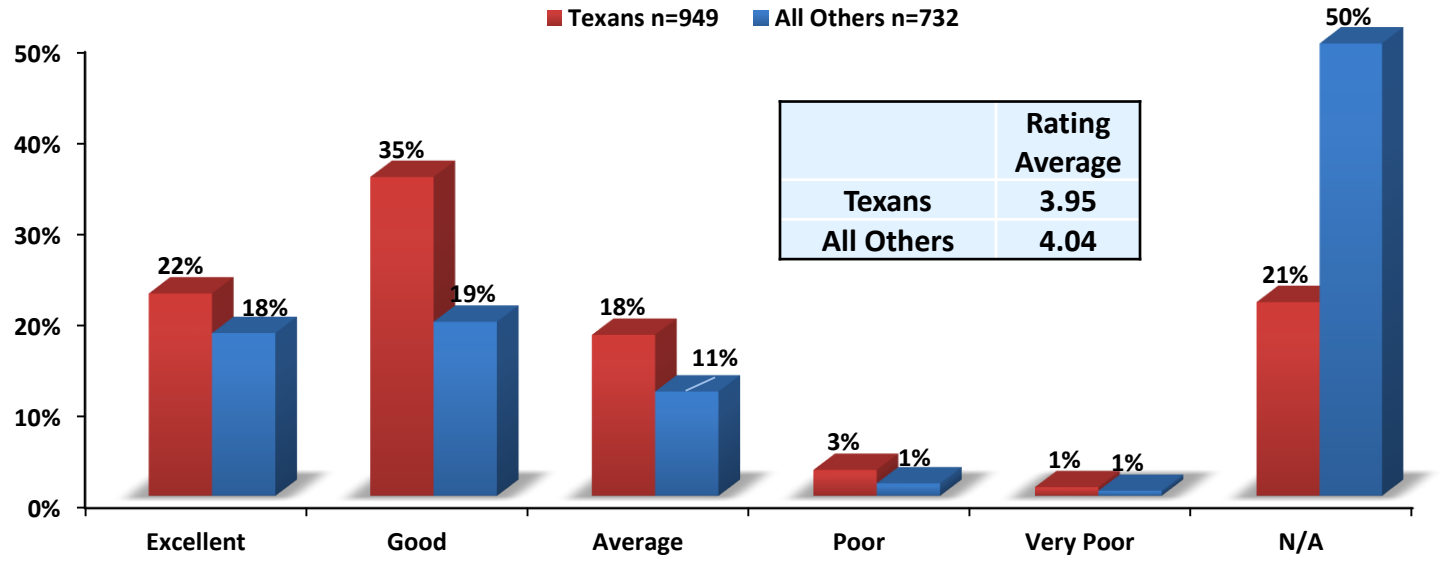
What Words Come to Mind When You Think of South Padre Island – NON-Texans

Beautiful
CollegeKids
Beach
Sun
Hot
nice
Sand
Ocean
Drinking
Fun
beach
Texas
Beaches
beaches
Water
sunny
beautiful
Dirty
Nice
none
crowded
Island
Cool
None
warm
fun
Warm
Crowded
Party
Nothing
party
Partying
hot
relaxing
Relaxing
NiceBeaches
exciting
NightLife
good
Tropical
Good
Amazing
Wild
Relax
sand
sun
water
Food
pretty
Pretty
Touristy
dirty
Cheap
Close
GulfCoast
Parties
Affordable
Secluded
Gulf
Humid
Young
Kids
Loud
Far
Sandy
Trashy
Unique
Clean
Quiet
Lovely
Florida
Hurricane
Beauty
Serene
peaceful
Shrimp
Musica
partying
drinking
Exciting
Awesome
FamilyOriented
boring
teenagers
resort
family
food
enjoyable
relax
cool
interesting
college
Sunny
Old
kids
Island
Youthful
Affordable
vacation
texas
beachy
Florida
Hurricane
Coastal
secluded
Crowded
Nothing
Partying
Cheap
Lovely
Close
GulfCoast
Parties
Affordable
Serene
Trashy
Unique
Clean
Quiet
Nice
none
Kids
Loud
Far
Sandy
Young
Humid
Old
kids
Secluded
Gulf
Island
Youthful
Beauty
Shrimp
Musica
partying
drinking
Exciting
Awesome
FamilyOriented
boring
teenagers
resort
family
food
enjoyable
relax
cool
interesting
college
Sunny
Tropical
Good
Amazing
Wild
Relax
sand
sun
water
Food
pretty
Pretty
Touristy
dirty
Cheap

Satisfaction With South Padre Island Visit

Observations: The ratings herein are slightly lower than those seen in the ratings of South Padre Island by visitors surveyed from SPI databases who had been to the island in the prior two years. The respondents in the research segment are comparing SPI to other destinations in the prior questions and are therefore being slightly more objective. More than half of Texan respondents rated SPI excellent or good.

If you have visited South Padre Island, please rate your most recent visit using the scale provided below. If you are planning a visit, but have not been to South Padre Island, please choose N/A and skip next question.

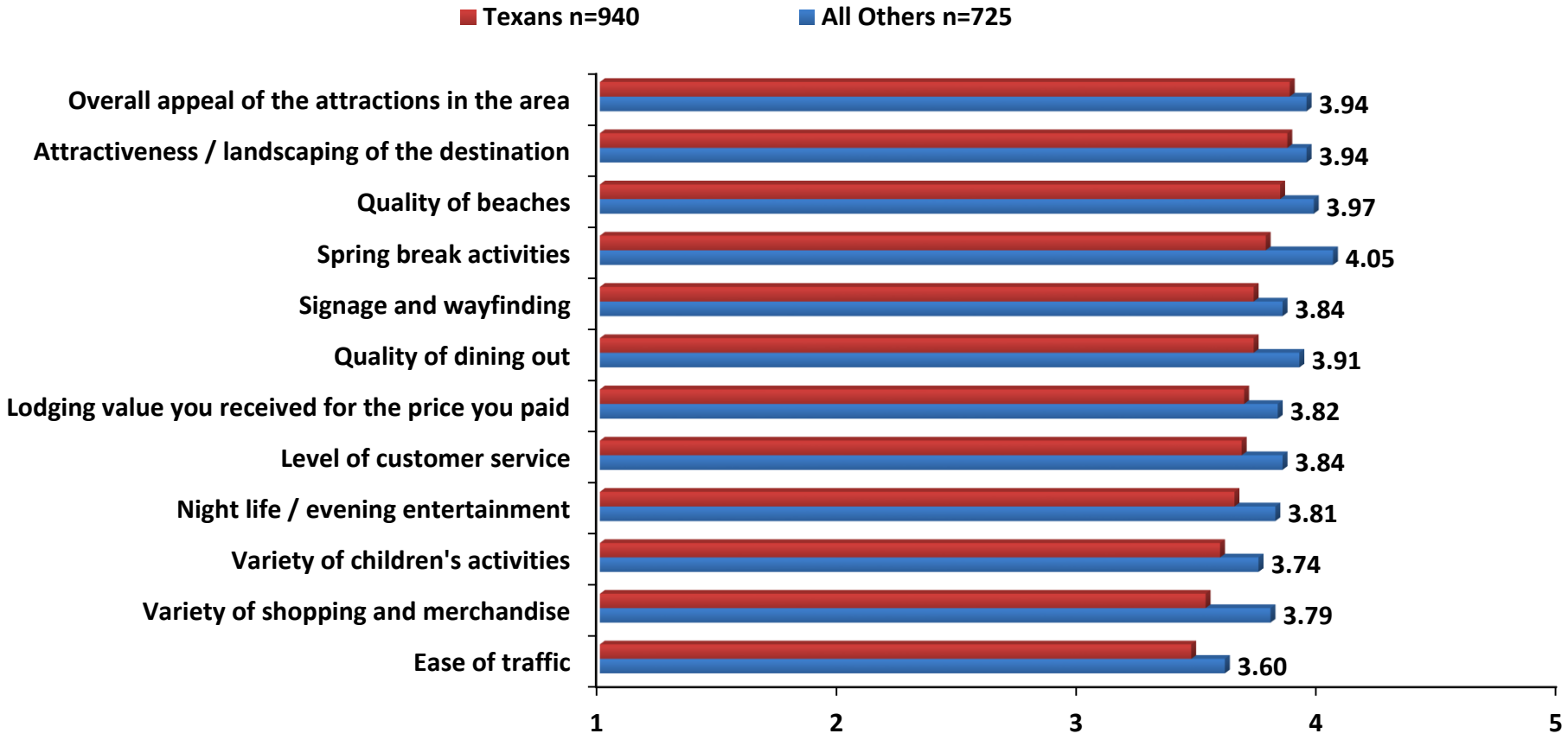


	Excellent	Good	Average	Poor	Very Poor	N/A	Rating Average
Texans n=949	22.2%	35.0%	17.7%	2.9%	1.0%	21.3%	3.95
All Others n=732	17.9%	19.1%	11.5%	1.4%	0.6%	49.6%	4.04

South Padre Island Satisfaction

Observations: Survey respondents were asked to rate attributes of South Padre Island using a five-point scale where five is highest and 1 is lowest. Ratings above 3.75 are desired and rarely do ratings exceed 4.6. Most of these amenities are rated at the lower end of the desired range. The rank order of satisfaction is very similar to the visitor survey in this study with ease of traffic and variety of shopping and merchandise rating lowest.

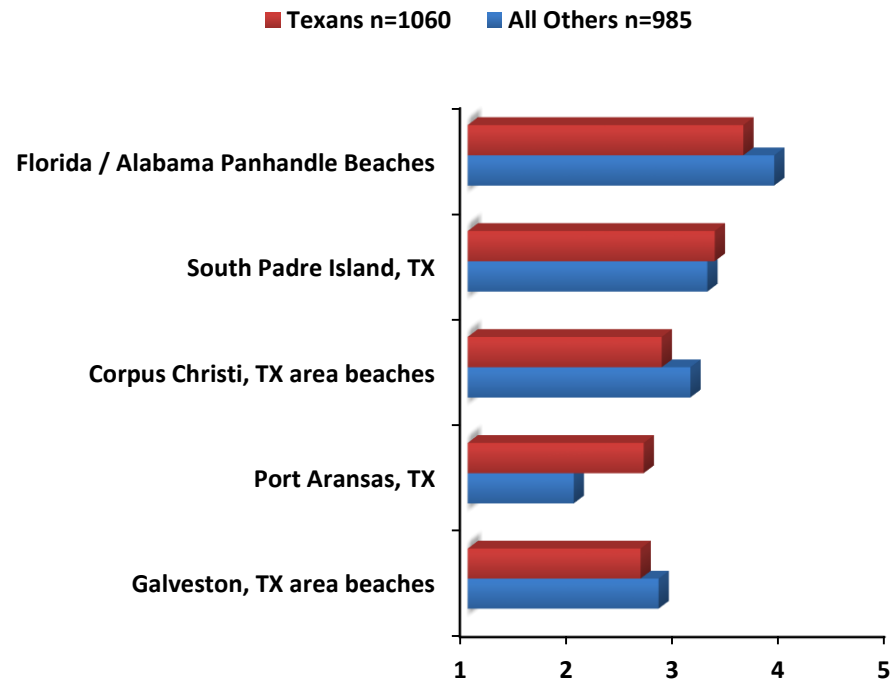
Following is a list of amenities offered in South Padre Island. Considering your most recent visit, please rate each amenity with the scale provided below (One to Five where one is low and five is high).
If you did not participate in any of the activities please check "N/A"Check on rating for each.



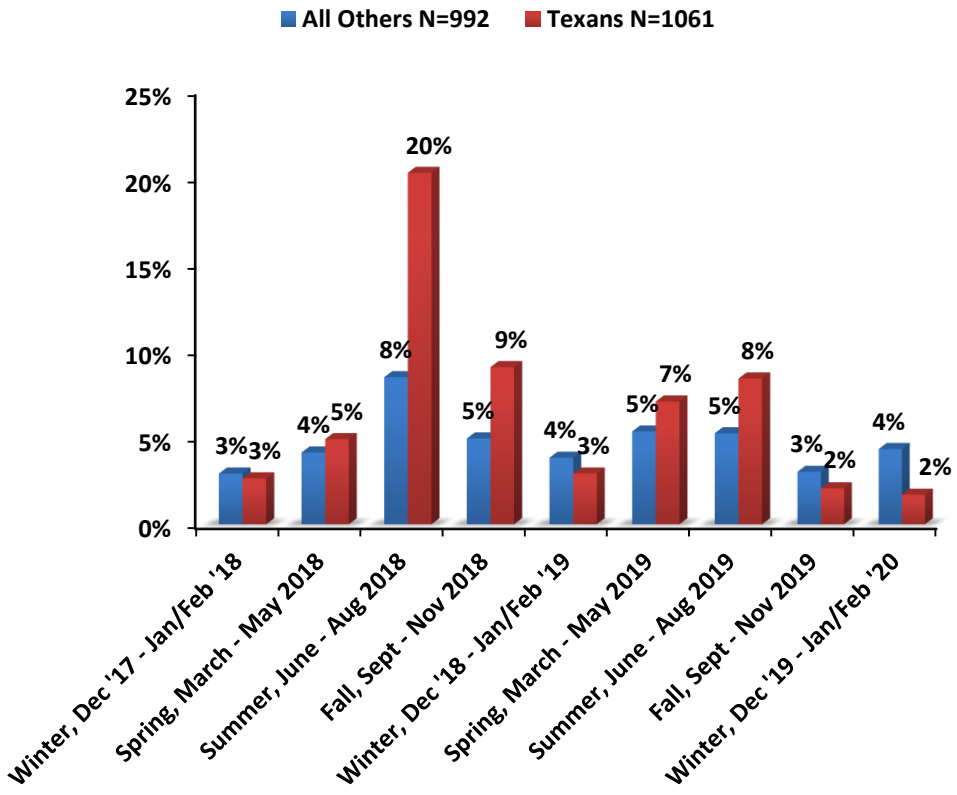
Gulf Coast Beach Future Visitation

Observations: Respondents were asked to place a list of five gulf coast destinations in rank order of where they desired to visit in the future. Florida beaches ranked highest and South Padre Island ranked second and higher than all other Texas beaches. When asked if they have or are visiting SPI in 2018/2019 we found that half or more of Texans have plans to visit with about 20% of the non-Texans committed to a visit.

Place the following Gulf Coast beach destinations in rank order of your preference for where you would like to visit in the near future:

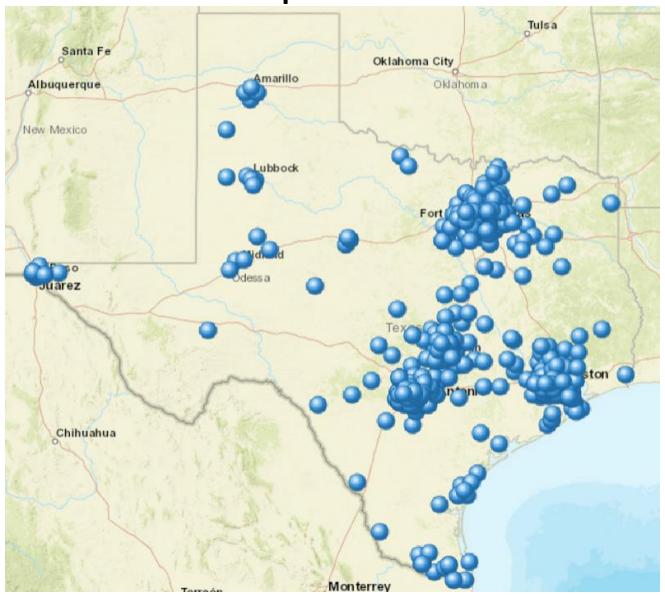


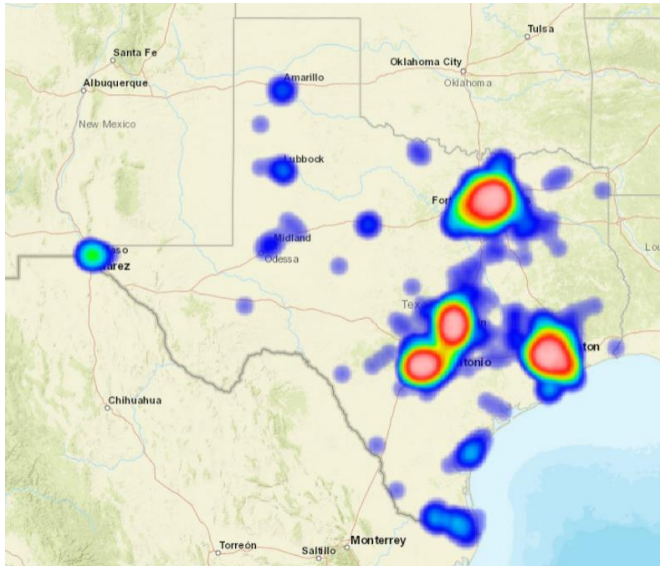
Have you visited, or are you planning to visit South Padre Island, TX in 2018 / 2019?(1) Yes, please choose the season(s) you visited or are planning to visit from the list provided below. Select all that apply. (Verbatim comments for those who indicated they are not planning a 2018/2019 visit are found in Addendum).



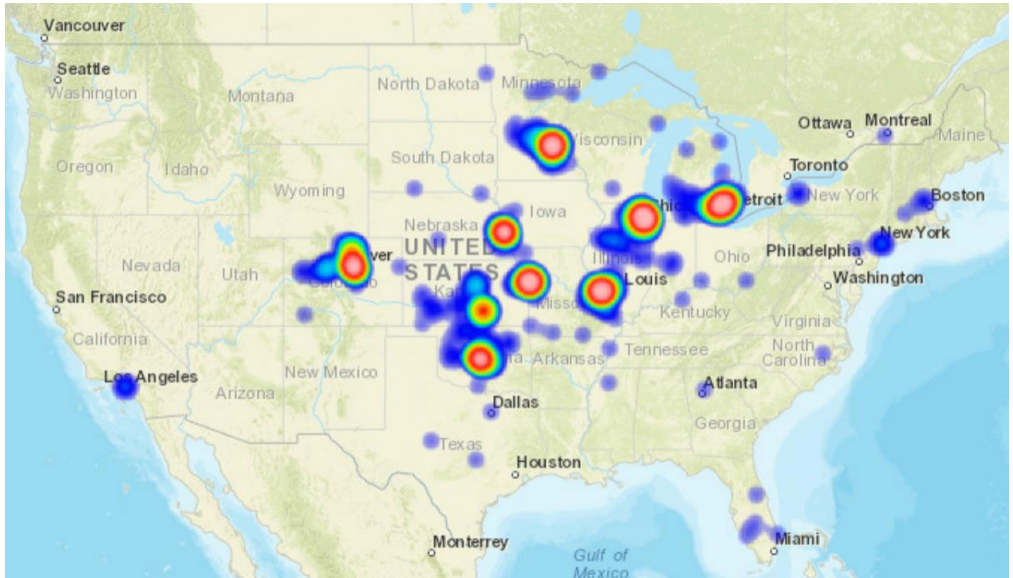
Point of Origin

TEXAS Responents





NON-TEXAS Responents



Point of Origin - TEXAS

State - City											
TEXAS- 100.0%		Boerne	5	Montgomery	3	Midland	2	Brazoria	1
Houston	163	Corpus Christi	5	North Richland	3	Missouri City	2	Brenham	1
San Antonio	131	Friendswood	5	Rockwall	3	Murphy	2	Brownsboro	1
Austin	98	Keller	5	S. Padre Island	3	Pasadena	2	Bulverde	1
Dallas	74	Allen	4	Southlake	3	Pflugerville	2	Cameron	1
Plano	27	Converse	4	Spring Branch	3	Richardson	2	Canyon	1
Fort Worth	17	Cypress	4	Azle	2	Richmond	2	Canyon Lake	1
Cedar Park	14	Forney	4	Bastrop	2	Roanoke	2	Cedar-creek	1
El Paso	13	Granbury	4	Cleveland	2	Rowlett	2	Chappell Hill	1
Round Rock	13	Humble	4	Conroe	2	Seguin	2	Cleburne	1
Arlington	12	Kyle	4	Corinth	2	Sherman	2	Coldspring	1
Irving	12	Lubbock	4	Deer Park	2	The Colony	2	College Station	1
Leander	12	San Marcos	4	Desoto	2	Tomball	2	Columbus	1
Katy	11	Schertz	4	Dickinson	2	Waxahachie	2	Concan	1
Pearland	11	Abilene	3	Edinburg	2	Webster	2	Dawson	1
Georgetown	10	Aledo	3	Fresno	2	Ackerly	1	Dayton	1
New Braunfels	10	Amarillo	3	Ft Worth	2	Addison	1	Decatur	1
Garland	9	Baytown	3	Galveston	2	Adkins	1	Denison	1
Lewisville	9	Brownsville	3	Hickory Creek	2	Alvarado	1	Dike	1
Mckinney	9	Buda	3	Hutto	2	Angleton	1	Dimmitt	1
Spring	9	Burleson	3	Kingsland	2	Atlanta	1	Doss	1
Sugar Land	9	Cedar Hill	3	Kingwood	2	Bacliff	1	Duncanville	1
Carrollton	8	Cibolo	3	La Porte	2	Balch Springs	1	El Lago	1
Frisco	7	Dripping Springs	3	La Vernia	2	Bellville	1	Elmendorf	1
Grapevine	7	Euless	3	Lago Vista	2	Belton	1	Fairfield	1
Coppell	6	Harlingen	3	Lakeway	2	Bertram	1	Farmers Branch	1
Denton	6	Krum	3	Liberty Hill	2	Big Spring	1	Flower Mound	1
Grand Prairie	6	Lake Jackson	3	Lockhart	2	Blanco	1	Fort Stockton	1
Helotes	6	Mansfield	3	Manchaca	2	Bogata	1	Garden Ridge	1
League City	6	McAllen	3			Brackettville	1	Gatesville	1

Point of Origin - TEXAS

State - City					
Giddings	1	Martindale	1	Texas City	1
Glenn Heights	1	McQueeney	1	The Woodlands	1
Gonzales	1	McGregor	1	Thrall	1
Greenville	1	Medina	1	Tioga	1
Gun Barrel City	1	Melissa	1	Victoria	1
Hitchcock	1	Moore	1	Waco	1
Holland	1	Odessa	1	Weatherford	1
House	1	Ovilla	1	Wellborn	1
Houston	1	Paige	1	Weslaco	1
Howe	1	Pattison	1	Wichita Falls	1
Huffman	1	Pilot Point	1	Willis	1
Ingleside	1	Pleasanton	1	Wills Point	1
Iowa Park	1	Port Arthur	1	Wilmer	1
Jacksonville	1	Port Lavaca	1	Woodville	1
Killeen	1	Porter	1	Wylie	1
Kingsville	1	Princeton	1	Zapata	1
La Marque	1	Prosper	1		
Laredo	1	Red Oak	1		
League	1	Rhome	1		
Levelland	1	Rockport	1		
Lindale	1	Rosenberg	1		
Little Elm	1	Sachse	1		
Livingston	1	Saginaw	1		
Mabank	1	San Angelo	1		
Magnolia	1	San Saba	1		
Malakoff	1	Schulenburg	1		
Malone	1	Seabrook	1		
Manor	1	Stafford	1		
Manvl	1	Temple	1		
Marble Falls	1	Terrell	1		

Point of Origin – ALL OTHERS

State – City											
ILLINOIS- 18.0%		Belleville	1	Libertyville	1	Wilmington	1	Foristell	1
Chicago	47	Bloomington	1	Lockport	1	Wood River	1	High Ridge	1
Mount Prospect	6	Bourbonnais	1	Maryville	1	Woodridge	1	House Springs	1
Aurora	4	Bradley	1	Maywood	1	**MISSOURI- 15.2%**		Imperial	1
Naperville	4	Breese	1	Midlothian	1	St. Louis	44	Joplin	1
Orland Park	4	Burr Ridge	1	Minooka	1	Kansas City	26	Leadwood	1
Edwardsville	3	Carpentersville	1	Monee	1	Lee's Summit	9	Liberty	1
Granite City	3	Chicago Heights	1	Norridge	1	Independence	6	Manchester	1
Oak Park	3	Clarendon Hills	1	North Aurora	1	Chesterfield	4	Maryland Heights	1
Oswego	3	Collinsville	1	North Riverside	1	Blue Springs	3	Maryville	1
Park Ridge	3	Columbia	1	Northbrook	1	Kirkwood	3	Ofallon	1
Buffalo Grove	2	Danville	1	Oregon	1	Raytown	3	Pacific	1
Frankfort	2	Dekalb	1	Orland Hills	1	St. Charles	3	Pleasant Hill	1
Galesburg	2	East Alton	1	Palos Heights	1	Arnold	2	Saint Mary	1
Geneva	2	East St Louis	1	Plainfield	1	Bridgeton	2	Sibley	1
Lake In The Hills	2	Evanston	1	Putnam	1	Fenton	2	St Peters	1
Lombard	2	Flanagan	1	Romeoville	1	Grain Valley	2	Sullivan	1
Morton Grove	2	Freeburg	1	Roselle	1	Lake St Louis	2	Thayer	1
Ofallon	2	Genoa	1	Saint Charles	1	Raymore	2	Union	1
Palatine	2	Germantown	1	Savoy	1	Ste Genevieve	2	Valley Park	1
Peoria	2	Glenview	1	Schaumburg	1	Wildwood	2	Washington	1
St. Charles	2	Glenwood	1	Smithton	1	Belton	1	Weatherby Lake	1
Tinley Park	2	Godfrey	1	South Beloit	1	Branson	1	Webster Groves	1
Vernon Hills	2	Grafton	1	Springfield	1	Brentwood	1	Wentzville	1
Westmont	2	Hampshire	1	Tinley	1	Butler	1	**MICHIGAN- 13.9%**	
Yorkville	2	Hanover Park	1	Troy	1	Cape Girardeau	1	Ann Arbor	10
Algonquin	1	Highland	1	Watsonville	1	Cuba	1	Detroit	7
Antioch	1	Hillsboro	1	Western Springs	1	Ellisville	1	Sterling Heights	7
Arlington Heights	1	Lake Zurich	1	Wheaton	1	Eureka	1	Rochester Hills	5
Batavia	1	Lansing	1	Willowbrook	1	Florissant	1	Westland	5

Point of Origin – ALL OTHERS

State – City											
Canton	4	Clarkston	1	Romeo	1	Carver	1	Spicer	1
Shelby Twp.	4	Clawson	1	Roseville	1	Columbia Heights	1	St Augusta	1
Troy	4	Clinton	1	St. Clair Shores	1	Crystal	1	St. Cloud	1
Clinton TWP.	3	Commerce	1	Utica	1	Dassel	1	Stillwater	1
Farmington Hill	3	Dearborn	1	Washington	1	Duluth	1	Stockpee	1
Novi	3	Dearborn Heights	1	Waterford	1	Eden Prairie	1	Vadnais Heights	1
Saint Clair Shores	3	East China	1	West Bloomfield	1	Faribo	1	Walker	1
South Lyon	3	Eastpointe	1	Whitehall	1	Farmington	1	Webster	1
Taylor	3	Garden City	1	Williamsburg	1	Golden Valley	1	West St. Paul	1
Ypsilanti	3	Gladstone	1	**MINNESOTA- 11.9%**		Grand Marais	1	White Bear Lake	1
Allen Park	2	Grosse Ile	1	Minneapolis	31	Grand Rapids	1	**COLORADO- 11.5%**	
Farmington	2	Grosse Pointe	1	St. Paul	6	Ham Lake	1	Denver	29
Livonia	2	Hamtramck	1	Plymouth	5	Hugo	1	Aurora	10
Macomb	2	Holland	1	Eagan	4	Hutchinson	1	Fort Collins	7
Monroe	2	Holt	1	Woodbury	4	Lecenter	1	Littleton	7
Northville	2	Howell	1	Blaine	3	Litchfield	1	Centennial	6
Pinckney	2	Inkster	1	Minnetonka	3	Little Canada	1	Boulder	4
Rochester	2	Ira	1	Apple Valley	2	Long Lake	1	Castle Rock	4
Southgate	2	Jackson	1	Buffalo	2	Maple Grove	1	Longmont	4
Warren	2	Lake Orion	1	Burnsville	2	Mayer	1	Greeley	3
Wixom	2	Lapeer	1	Forest Lake	2	Millville	1	Broomfield	2
Ada	1	Lincoln Park	1	Inver Grove	2	New Brighton	1	Colorado Springs	2
Alpena	1	Mulliken	1	Lakeville	2	New Hope	1	Highlands Ranch	2
Auburn Hills	1	Oakland Twp.	1	Saint Paul	2	Northfield	1	Lakewood	2
Belleville	1	Oxford	1	Savage	2	Otsego	1	Loveland	2
Birmingham	1	Pigeon	1	Afton	1	Owatonna	1	Silverthorne	2
Bloomfield	1	Plymouth	1	Alexandria	1	Prior Lake	1	Vail	2
Brighton	1	Pontiac	1	Benson	1	Rogers	1	Westminster	2
Brooklyn	1	Port Huron	1	Bloomington	1	Rosemount	1	Arvada	1
Chelsea	1	Portage	1	Brooklyn Park	1	Sauk Rapids	1	Avon	1

Point of Origin – ALL OTHERS

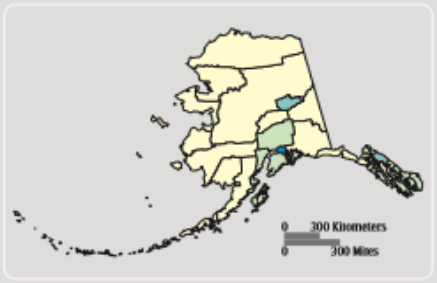
State – City									
Battlement Mesa	1	Bel Aire	2	Midwest City	3	Fremont	4	Lake Placid	1
Bloomfield	1	Lawrence	2	Shawnee	3	Wahoo	2	Long Bottom	1
Brighton	1	Leawood	2	Tecumseh	3	Fort Calhoun	1	Longmeadow	1
Dacono	1	Prairie Village	2	Moore	2	La Vista	1	Lowell	1
Durango	1	Brookville	1	Seminole	2	Lincoln	1	Middle Village	1
Edwards	1	Caldwell	1	Stillwater	2	Nebraska City	1	Munster	1
Elizabeth	1	Derby	1	Alva	1	Plattsmouth	1	Palm Beach	1
Englewood	1	El Dorado	1	Arapaho	1	Syracuse	1	Plainfield	1
Estes Park	1	Garden City	1	Bixby	1	Tekamah	1	Schleswig	1
Firestone	1	Goddard	1	Chandler	1	Waterloo	1	Sxotrsfa	1
Frederick	1	Great Bend	1	Cherokee	1	Wayne	1	Winter Springs	1
Golden	1	Lawrence	1	Choctaw	1	Yutan	1		
Greenwood	1	Liberal	1	El Reno	1	**OTHER CITIES- 3.0%**			
Idalia	1	Lincoln	1	Elk City	1	Los Angeles	2		
Lafayette	1	Maize	1	Enid	1	New York	2		
Parker	1	McPherson	1	Hinton	1	Arkansas	1		
Red Feather	1	Minneapolis	1	Macomb	1	Atlanta	1		
Silt	1	Mulvane	1	Newcastle	1	Ayer	1		
Wheat Ridge	1	Pratt	1	Noble	1	Bank	1		
Windsor	1	Roeland Park	1	Owasso	1	Batesville	1		
Wolcott	1	Scott City	1	Perry	1	Buffalo	1		
KANSAS- 9.7%		Stafford	1	Piedmont	1	Chateauguay	1		
Wichita	25	Topeka	1	Ringling	1	Coopersburg	1		
Olathe	12	Winfield	1	St. Charles	1	Flushing	1		
Overland Park	12	**OKLAHOMA- 9.1%**		Tulsa	1	Fort Myers	1		
Kansas City	6	Oklahoma City	26	**NEBRASKA- 7.6%**		Ft Collins	1		
Leavenworth	3	Norman	13	Omaha	45	Grand Forks	1		
Lenexa	3	Edmond	7	Bellevue	5	Greenville	1		
Salina	3	Yukon	6	Papillion	5	Hudson	1		
Shawnee	3	Mustang	4	Elkhorn	4	Kokoimo	1		

South Padre Island CVB Research Summary & Conclusions

YOUNG strategies, inc.
fresh. travel. research.

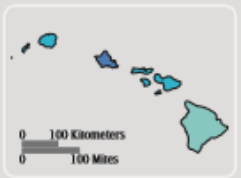
2010 Census: United States Profile

Population Density by County†



United States Population 1970 to 2010

2010	308,745,538
2000	281,421,906
1990	248,709,873
1980	226,545,805
1970	203,211,926

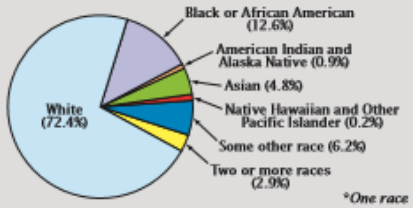


0 100 300 500 Kilometers
0 100 300 500 Miles

United States Census Bureau

†County and statistically equivalent entity

U.S. Race* Breakdown

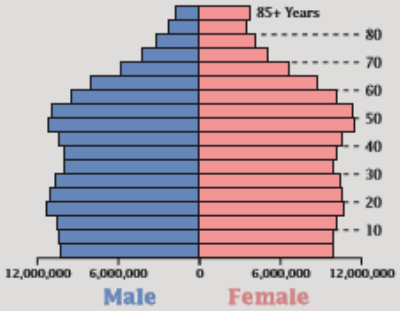


*One race

Hispanic or Latino (of any race) makes up **16.3%** of the U.S. population.

Population by Sex and Age

Total Population: 308,745,538



Housing Tenure

Total Occupied Housing Units: 116,716,292

65.1% Owner Occupied	34.9% Renter Occupied

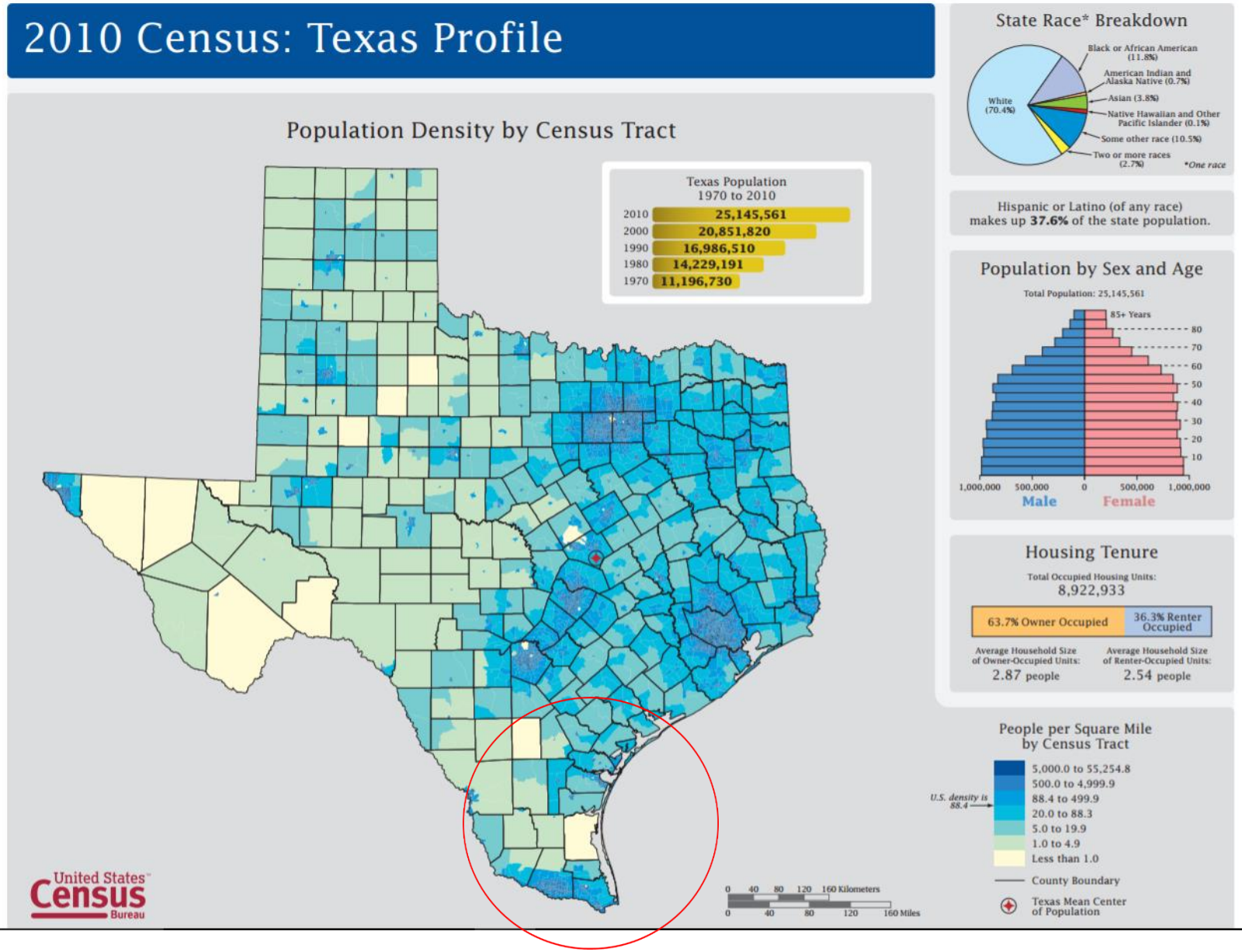
Average Household Size of Owner-Occupied Units:	Average Household Size of Renter-Occupied Units:
2.65 people	2.44 people

People per Square Mile by County†

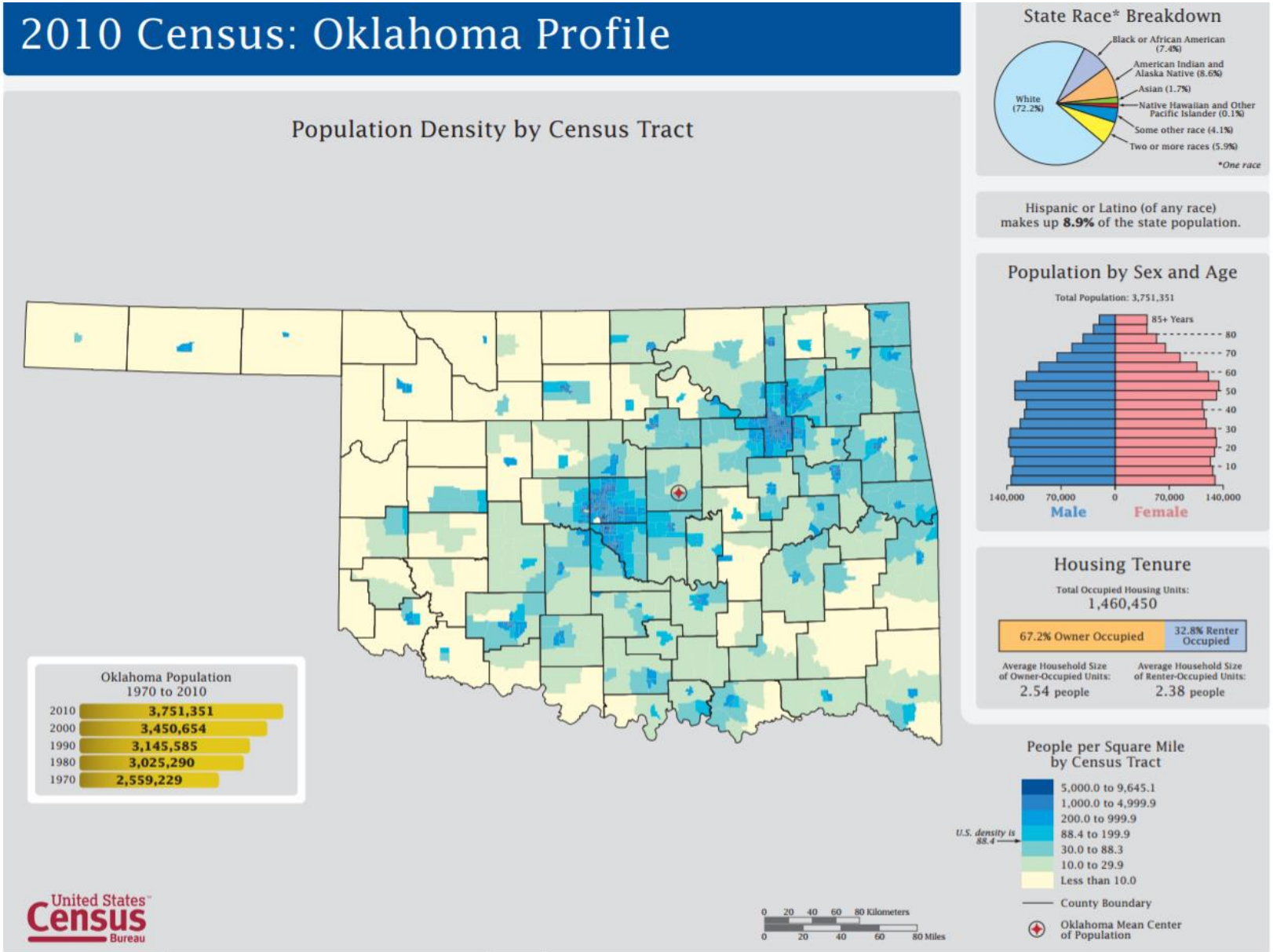
U.S. density is 88.4

- 3,000.0 to 69,468.4
- 300.0 to 2,999.9
- 160.0 to 299.9
- 88.4 to 159.9
- 7.0 to 88.3
- 1.0 to 6.9
- Less than 1.0
- State Boundary
- County† Boundary
- United States Mean Center of Population

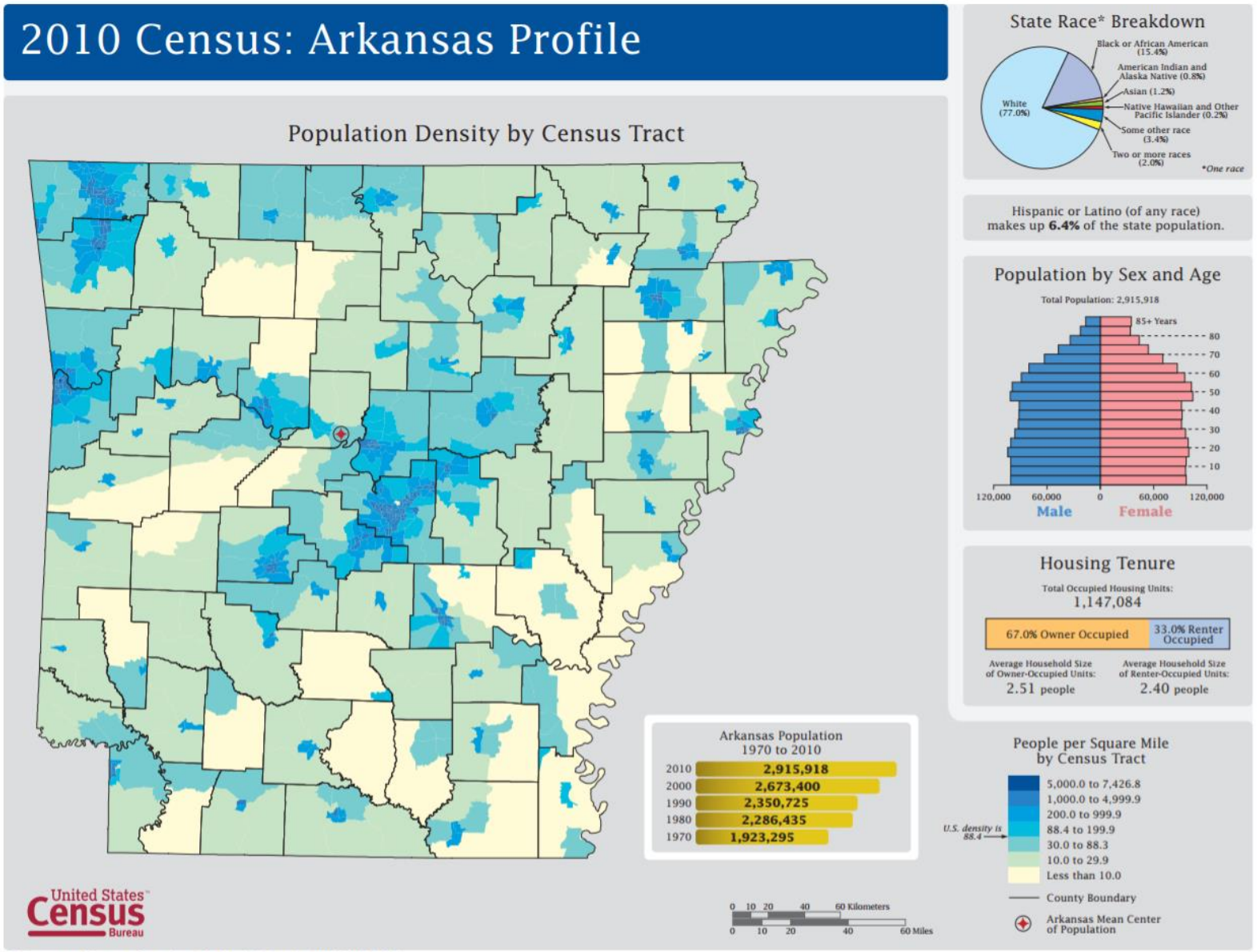
South Padre Island

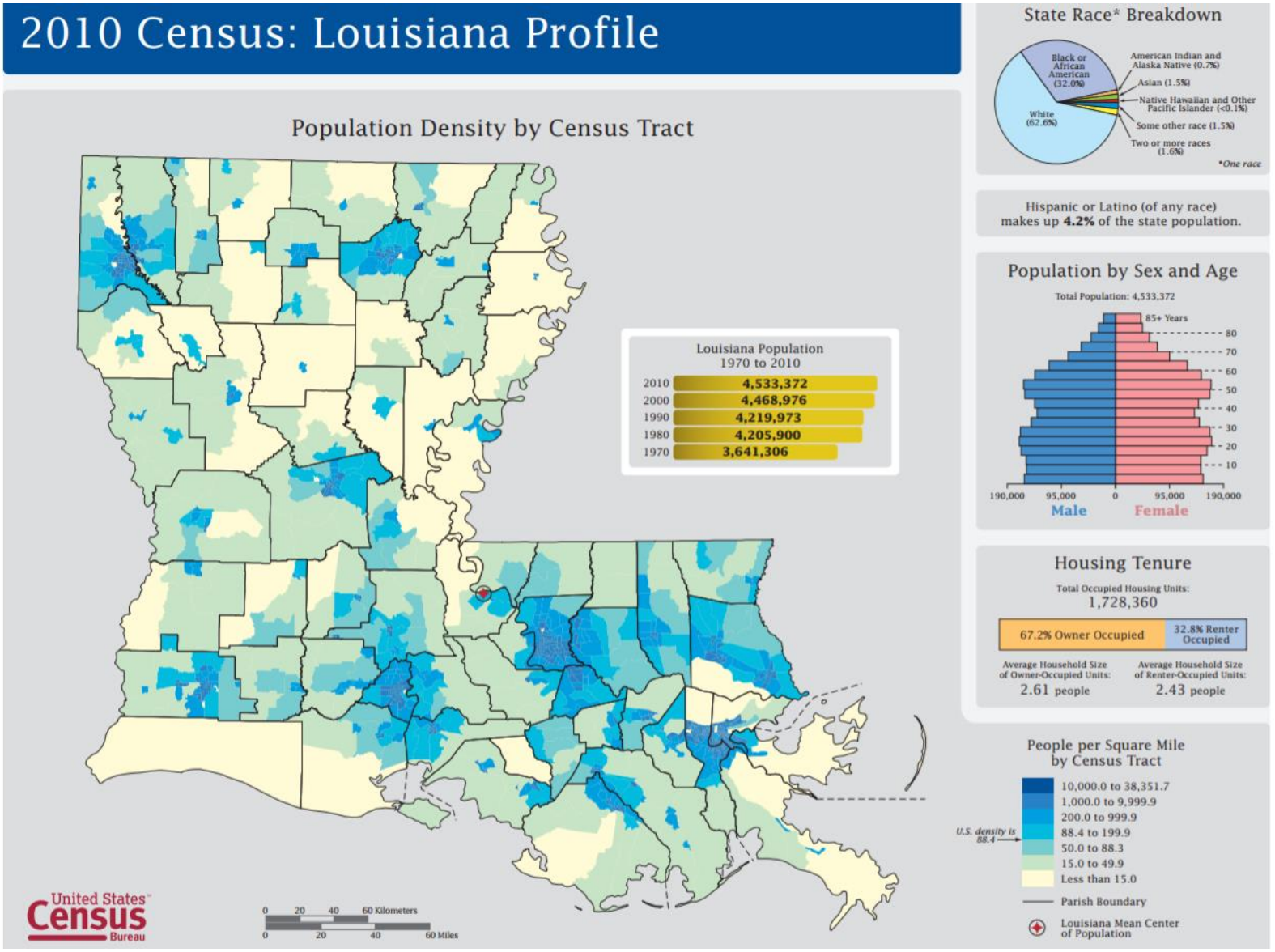


South Padre Island

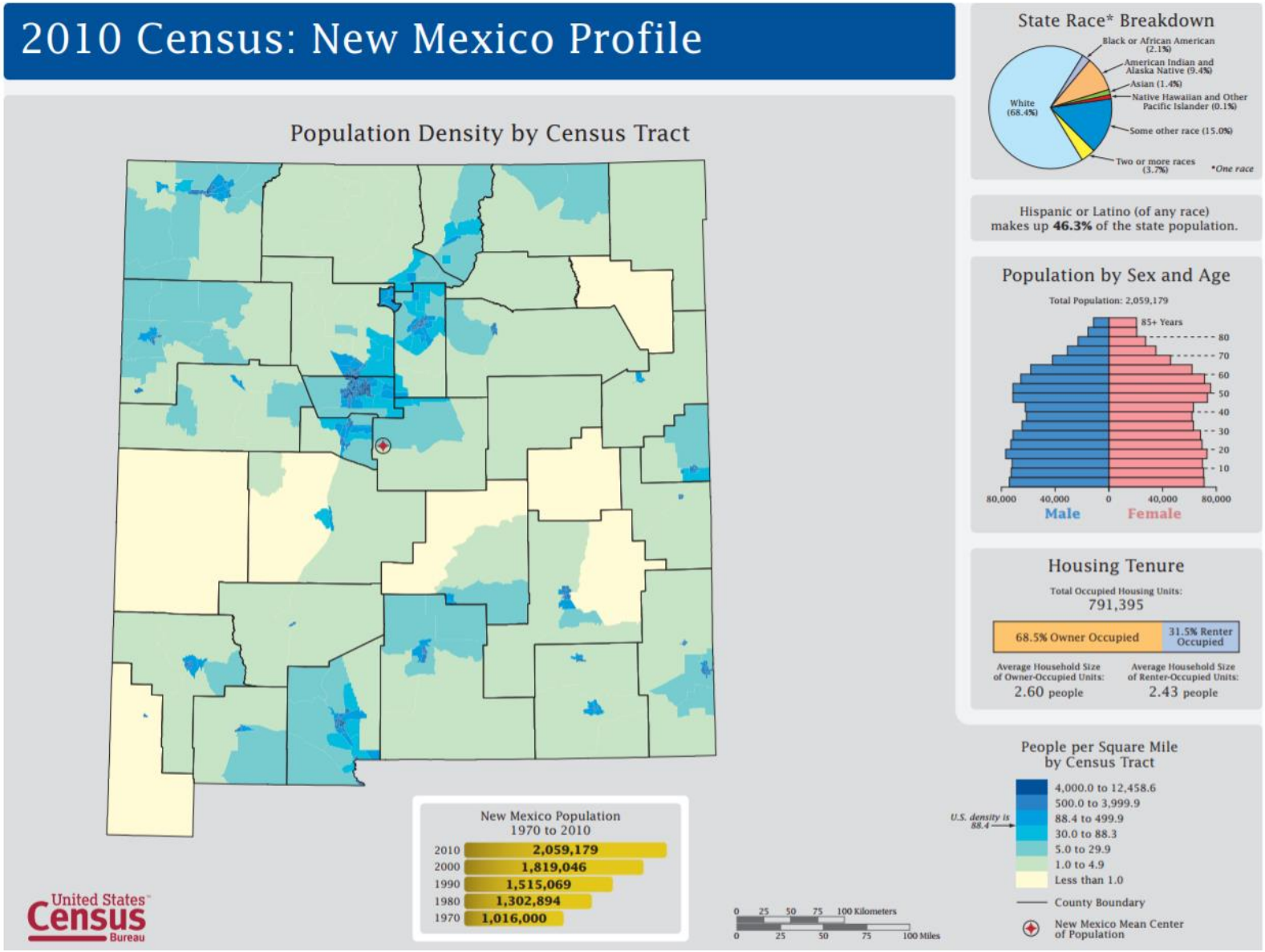


South Padre Island




2010 Census: Louisiana Profile
Population Density by Census Tract
Louisiana Population
1970 to 2010
2010 4,533,372
2000 4,468,976
1990 4,219,973
1980 4,205,900
1970 3,641,306
United States Census Bureau
0 20 40 60 Kilometers
0 20 40 60 Miles
State Race* Breakdown
Black or African American (32.0%)
American Indian and Alaska Native (0.7%)
Asian (1.5%)
Native Hawaiian and Other Pacific Islander (<0.1%)
Some other race (1.5%)
Two or more races (1.6%)
White (62.6%)
*One race
Hispanic or Latino (of any race) makes up 4.2% of the state population.
Population by Sex and Age
Total Population: 4,533,372
85+ Years
80
70
60
50
40
30
20
10
190,000 95,000 0 95,000 190,000
Male
Female
Housing Tenure
Total Occupied Housing Units:
1,728,360
67.2% Owner Occupied
32.8% Renter Occupied
Average Household Size of Owner-Occupied Units:
2.61 people
Average Household Size of Renter-Occupied Units:
2.43 people
People per Square Mile by Census Tract
10,000.0 to 38,351.7
1,000.0 to 9,999.9
200.0 to 999.9
U.S. density is 88.4
88.4 to 199.9
50.0 to 88.3
15.0 to 49.9
Less than 15.0
Parish Boundary
Louisiana Mean Center of Population

South Padre Island



South Padre Island

YOUNG strategies, inc.

South Padre Island

YOUNG strategies, inc.

Young Strategies, Inc.
Research Team Experience

Client Destinations

The Young Strategies project team, both individually and collectively have conducted destination research and planning in the following states:

Alabama
Arizona
California
Florida
Georgia
Iowa
Illinois
Kansas
Kentucky
Louisiana
Massachusetts
Minnesota
Missouri
Mississippi
North Carolina
North Dakota
Nebraska
New Jersey
New York
Pennsylvania
South Carolina
South Dakota
Tennessee
Texas
Washington
West Virginia
Wyoming
Virginia

YOUNG strategies, inc.

South Padre Island CVB
Research Team

Young Strategies, Inc. (YSI) is a research and planning firm focusing on destination marketing organizations and travel destinations. The three principal members of this project team have conducted research and strategic planning with over 100 DMOs in twenty-six states. YSI's approach is to custom tailor each research study to the specific needs of the destination. The final report will be an easy to read document that presents the customer-focused data with recommendations for action. YSI is a small boutique firm that develops a close bond with our clients who are devoted to our process that delivers clear actionable strategies for future growth. The project team's hands-on experience includes CVB/DMO management, hotel/resort management, rural tourism development and convention center management.

Berkeley W. Young, President - Project Team Leader

20 years of travel/tourism marketing and management experience including destination marketing and hotel management. Young's experience includes serving as the Executive Director of a start-up convention and visitors bureau and chamber of commerce in which he oversaw the creation and success of a research-based tourism marketing program for a rural county in the mountains of North Carolina. Then, Young was hired as Director of Sales and quickly promoted to General Manager of a large golf resort managed by Interstate Hotels Corporation. Young joined Randall Travel Marketing in 1998 as Vice President conducting research for DMOs throughout the United States. He opened Young Strategies in November 2004 focusing on strategic planning and research for destination marketing organizations.

Amy Stevens, Vice President - Lodging Market Analysis, Research Coordination

15 years of travel, tourism and marketing experience. As Vice President/Research Director, Stevens is responsible for writing surveys, conducting research, analyzing data and writing reports for Young Strategies. Stevens worked with Randall Travel Marketing prior to working for Young Strategies. Stevens also worked with Navigant International, the second largest travel management company in the United States, and was responsible for sales, business travel accounts, training and development and conflict resolution. She handled written and multi-media presentations and developed marketing materials and programs to increase both leisure and corporate business travel.

Larry Gustke, PhD - Destination Analytics - Oversight of Research Process and Validation

Over 30 years' experience in conducting research on outdoor recreation, tourist behavior and tourism marketing. Dr. Gustke has conducted research in over 30 U.S. states and internationally. Dr. Gustke has also conducted extensive research among outdoor dramas in North America. As professor emeritus, NC State University, Dr. Gustke has designed the research methodology proposed in this study based on his years of experience. He received his Ph.D. from Texas A&M, and is considered one of the most accomplished tourism researchers in the field today. Dr. Gustke is active in the Travel and Tourism Research Association (TTRA), and in many other academic and professional networks related to tourism research. Dr. Gustke is a founding partner of Destination Analytics.

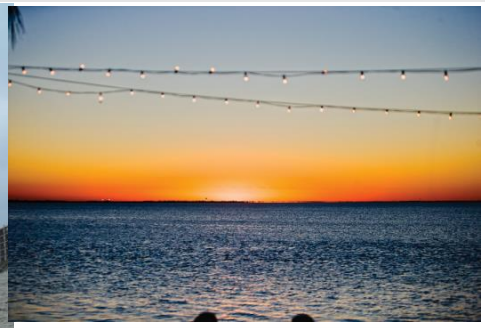
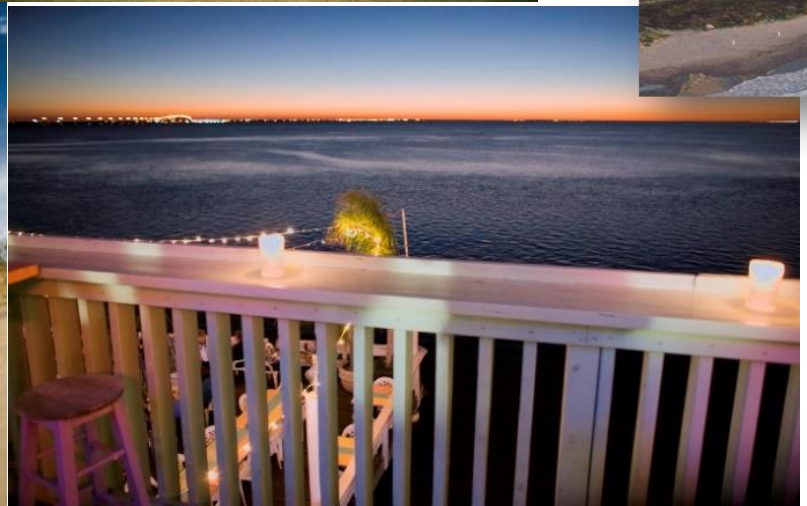
Alexa Gifford, Research Analyst - Online Survey Supervision, Data Tabulation and Analysis

25 years of marketing and management experience including destination marketing and facility management. Gifford's experience most recently includes serving as the Executive Director of a start-up wine and culinary center in which she oversaw the creation and success of educational programs that developed partnerships with producers, vendors, farmers, winery owners and educational institutions across New York State. Prior to that Gifford was president of a 14-county regional tourism association in the Finger Lakes region of New York. While at this association, Gifford successfully lead the development and implementation of research based marketing and sales programs for this diversified vacation destination. Alexa's role on the team is to work closely with constituents within the destination to collect data, monitor research return rates and data accuracy as well as assisting in the compilation of final report data. Gifford lives with her family in Penn Yan, New York.

Addendum:
Verbatim Responses to Survey Questions of Respondents Winter Visitors

Addendum:
Verbatim Responses to Survey Questions of Respondents
Spring Visitors

Addendum:
Verbatim Responses to Survey Questions of Respondents Summer Visitors

Addendum:
Verbatim Responses to Survey Questions of Respondents
Fall Visitors

- **The Texas economy is outpacing the nation once again**, following the mid-decade downturn in energy prices and output. Real GDP and employment growth have surged as oil prices have rebounded. Job growth has increased ahead of the region, as its diverse economy is once again firing on all cylinders. Business activity and sentiment has ramped up, according to the Dallas Fed Manufacturing Outlook, which is at its highest level since January 2006.
- **Nonfarm payrolls rose 2.4 percent this past year, netting 294,000 new jobs**. Natural resources and mining payrolls rose 12.5 percent and are up nearly 18 percent since bottoming in November 2016. The sector's employment is still 25 percent below its 2014 peak, even though oil production has surpassed previous highs. The energy industry has vastly increased productivity and is also still benefitting from the investment boom earlier this decade.
- **Construction payrolls are also up solidly, as strong population and employment growth drive demand for homes and apartments.** The Texas Rangers also recently broke ground on a new $1.1 billion baseball stadium in Arlington, slated for completion in 2020.
- **The improved economic performance is impressive given the challenges the Lone Star State faced this past year. Hurricane Harvey** was the second-most costly hurricane in U.S. history, with an estimated $125 billion in damages. While devastating to life and property, payrolls recovered quickly and Houston's economy was back up and running fairly quickly. **The storm highlighted Texas' resilient economy, as the state continued to grow throughout the period.**