South Padre ISLAND

Quantitative Awareness & Image Survey
Summary REPORT

July 15 2015

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Contents

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Background, Objective and Approach

Background:

The South Padre Convention and Visitors' Bureau (SPI CVB) has very little visitor research at it's disposal. As the SPI CVB continues to grow and to refine its marketing and communications plans, they would like to learn more about their visitor in order to effectively sell the island to potential and return visitors.

As part of this effort, an online survey of travelers was designed to better understand awareness and familiarity with SPI, as well as experiences, motivations, bonds/barriers, advertising recall and likelihood to visit.

The results of this survey will be used to inform future communications planning and programs.

Objective:

To better understand current and potential visitors to SPI in order to refine and optimize marketing communications programs.

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Background, Objective and Approach

Methodology:

Online survey using consumer opinion panelists. Total sample of respondents was 900 survey. Each survey was approximately 12 minutes long. We completed 150 surveys in each of 6 markets: Austin, San Antonio, Houston, Dallas/Ft.Worth, Minneapolis, Mexico (Guadalajara, Mexico City, Monterrey).

- Gender – 40% male; 60% Female
- Ages – 1/3 18 to 34 years; 1/3 35 to 54 years; 1/3 55 years +
- Family status – Minimum 1/3 with child at home under 18 years
- Income – Above market median (Adjusted for 18 to 24 year olds)
- Travel – Must have taken at least 1 overnight trip in past year and stayed in paid lodging

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What we covered*:

- SPI Top of Mind Awareness – Familiarity and Visit Experience with SPI
- SPI and Competitive Beach Appeal
- Most Important Beach Destination Features
- SPI & Competitive Texas Beach Ratings
- SPI Features vs. Most Important Beach Destination Features
- SPI Promotional Awareness and Future Visit Intent

* Please see full survey instrument for more detail

Methodology

- Galloway Research Service in San Antonio, TX fielded both the online survey and recruited respondents to the survey.

- Lists of potential respondents were drawn from a professional opinion research panel of more than 2 million consumers in the US and Mexico.

- Potential respondents were targeted by known characteristics for market area, gender, age, income, and likelihood to travel.

- Survey participants were paid an incentive as part of the panel participation.

- The completed sample consisted of 900 surveys segmented as follows:

Markets	#	Gender	#	Family Status	#	Travel Freq.	#
Austin	150	Male	355	With kids	343	1-2 trips/yr.	364
Dallas-Ft Worth	150	Female	545	Without Kids	557	3 trips/yr.	199
Houston	150	Age		Income		4+ trips/yr.	337
Minneapolis	150	18-34	295	High (1st Qtr.)	612		
San Antonio	150	35-54	305	Medium (2nd Qtr.)	288		
Austin	150	55+	300				
Mexico	150						

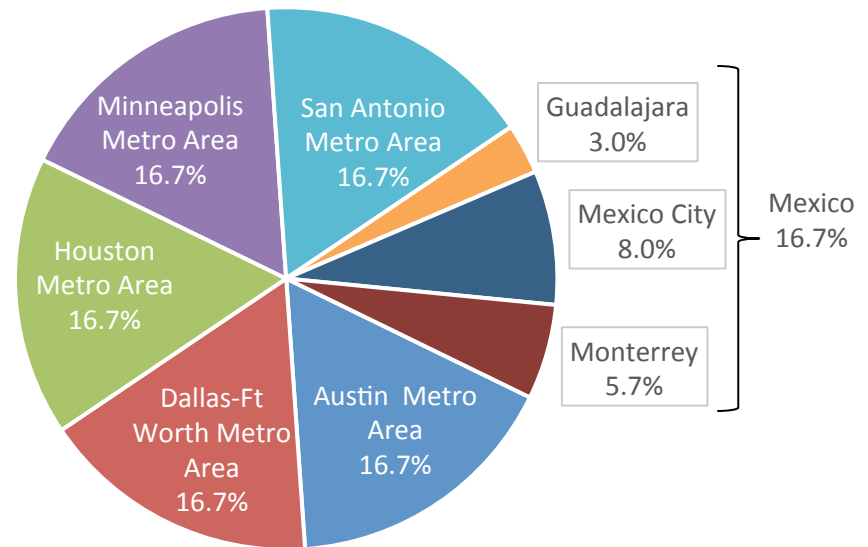MACHETE

RESPONDENT DEMOGRAPHIC OVERVIEW

Demographics

Key Demographic Characteristics:

- Sample evenly distributed among 6 markets

- Gender and family status proportions achieved by quotas

- Preference given to females as they are most often vacation decision maker

- Roughly 30% to 35% of all households have child <18

Sample by Market
N=900

Minneapolis Metro Area 16.7%
San Antonio Metro Area 16.7%
Guadalajara 3.0%
Mexico City 8.0%
Mexico 16.7%
Houston Metro Area 16.7%
Monterrey 5.7%
Dallas-Ft Worth Metro Area 16.7%
Austin Metro Area 16.7%

Gender

39% Males
61% Females

Family Status

38% With Children <18 yrs.
62% No Children <18 yrs.

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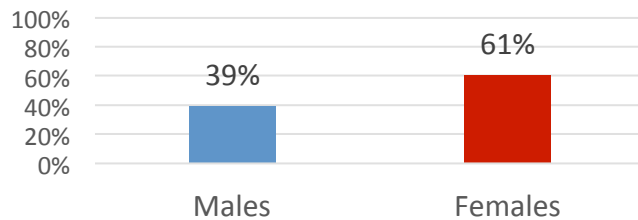
Demographics

Key Demographic Characteristics:
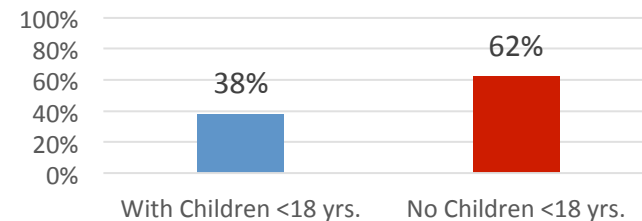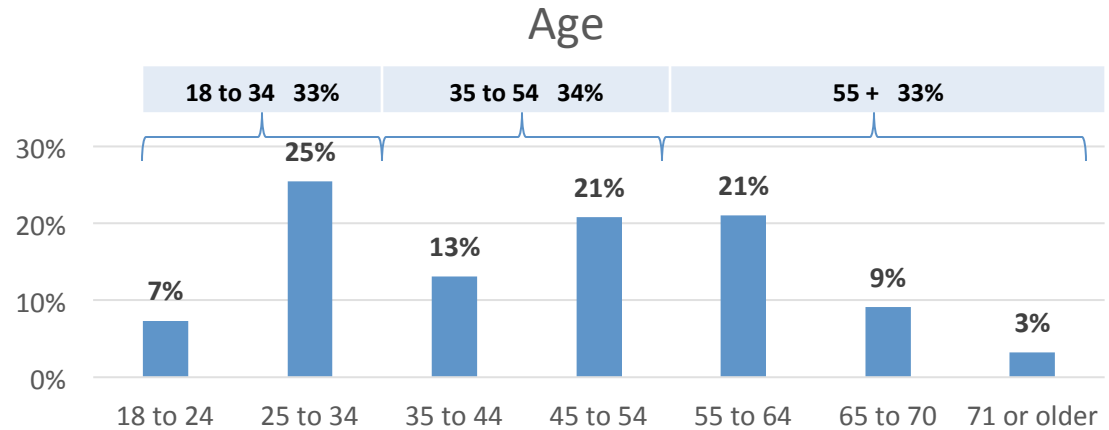
- Ages evenly divided 18 to 34, 35-54, & 55+

- Minimum Income qualifiers based on approximate median incomes for each market. Data segmented based on 1st highest 25% of HH incomes & 2nd highest 25% of incomes. All respondents in top 50% of HHI.

Age

18 to 34 33%	**35 to 54 34%**	**55 + 33%**

- 18 to 24: 7%
- 25 to 34: 25%
- 35 to 44: 13%
- 45 to 54: 21%
- 55 to 64: 21%
- 65 to 70: 9%
- 71 or older: 3%

Market	Medium – 2nd Qtr.	High – 1st Qtr.
Austin	**$54,000 to $98,000**	**Over $98,000**
Dallas	**$43,000 to $77,000**	**Over $77,000**
Houston	**$45,000 to $86,000**	**Over $86,000**
Minneapolis	**$50,000 to $94,000**	**Over $94,000**
San Antonio	**$46,000 to $87,000**	**Over $87,000**
Mexico	**$100,000 to $200,000 (pesos)**	**Over $200,000 (pesos)**

Note: For respondents 18 to 24 yrs. income qualifying rates were reduced by 40 to 45% in each market

Income

- Medium 2nd Qtr: 32%
- High 1st Qtr: 68%

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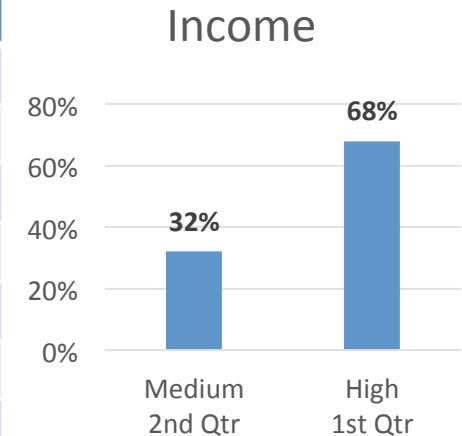
Travel frequency considerations:

- We measured travel frequency in two ways:

- # of Overnight trips during the past year and…

   (includes stays with family and friends, camping, etc.)

- Overnight trips in paid lodging over the past year.

- Average, Frequent and Very Frequent segments are based on the total overnight trips per year.

- All respondents had to have made at least 1 paid lodging trip to qualify for the survey.

Travel Frequency – Overnight Trips
% of respondents taking # of overnight trips in past year

40%	22%	38%
Average 1-2 trips/yr.	Frequent 3 trips/yr.	Very Frequent 4+ trips/yr.
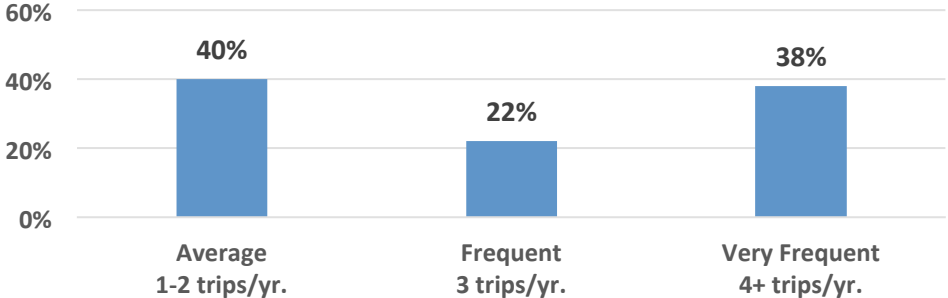
Overnight Trips in Paid Lodging
% of respondents taking # of paid lodging trips in past year

23%	31%	21%	26%
1 trip	2 trips	3 trips	4+ trips

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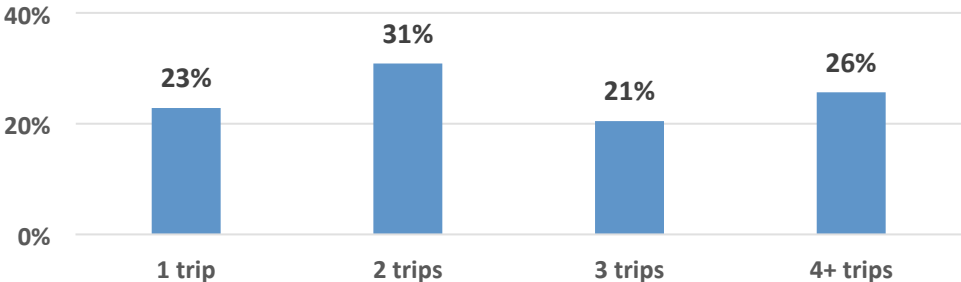
EXECUTIVE SUMMARY AND IMPLICATIONS

Executive Summary

- The **beach is the most appealing type of vacation destination** among U.S. respondents. Mexican respondents demonstrate a preference for big cities, followed closely by the beach.
  - As the most desirable vacation destination, SPI must fully embrace its identity as a beach destination and leverage its status as one of the best beaches in Texas.

- When respondents think about appealing vacation destinations, **NYC, Las Vegas and Hawaii top their list.** Texas beaches (combined) are 26th on the list, with several competitive beaches (FL, CA) before them.
  - Texas beaches – led by SPI – must establish their presence in the consideration set of travelers by touting the clean beach, clear water and relaxing environment of the Texas coast in order to compete with out-of-state beaches.

- Among a select set of beach destinations, SPI enjoys good appeal ratings (62%) and is rated the **most appealing beach destination among those tested in Texas**.
  - Efforts should be made to reach out to the groups that find SPI the most appealing – families with kids, higher income respondents and frequent travelers.

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Executive Summary

- San Antonio and Austin respondents demonstrate the **most experience** with SPI; having visited more than respondents in other markets. Alternatively, respondents from Houston, Dallas, Minneapolis and Mexico are less likely to have visited SPI.
  - Focus on repeat visitation in SA and Austin, while cultivating new growth and visitation from key Midwest and Mexican markets. Texas markets such as Dallas and Houston are prime for a "discover SPI" message, which urges them to check out the island, since they have relatively high appeal ratings already.

- There is **a gap between appeal ratings and experience** and familiarity with SPI. San Antonio demonstrates the highest appeal and experience ratings, but lacks familiarity with SPI.
  - SPI must make efforts to constantly refresh their offerings and push information out to key markets (SA, Mexico, Austin) in order to encourage repeat visits. SPI needs to give travelers from these markets a "reason to return" to the island.

- Respondents traveling from farther away – Mexico and Minneapolis – tend to **spend more time and more money** while in SPI.
  - Shopping and "winter" or "off season" activities appear to garner more expenditures for SPI. The island should continue to cater to off-season visitors (Winter Texans) by creating opportunities for them to spend money in the community (i.e. farmer's markets, fairs, shopping, concerts, events etc.). Additionally, while SPI rates lower than other TX beach destinations in terms of shopping, attention should be given to highlighting the unique shopping opportunities available in SPI.

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Executive Summary

- The most important drivers for choosing a beach destination are: **Clean beaches and clear water** and **relaxation**. SPI deliver on these attributes, but falls short on the ratings for "easy access" and "highly rated, affordable lodging."
  - SPI must continue to push messaging which speaks to the island's quality beaches and relaxed, local feel. However, special attention should be paid to dispelling access (by car or air) concerns and to amping up the quality and "feel" of lodging options on the island.

- In terms of "value for the money spent," SPI beats out other TX beach destinations on **3 out of the top 4 important features for choosing a beach.**
  - SPI faces challenges in terms of distance/proximity to home. It is not considered "easily accessible" and "distance" is one of the top barriers to visitation for SPI. Specific attention should be paid to explaining the value of the extra travel to the island, particularly in comparison to other Texas beach destinations.

- Sub-segments that give SPI the highest ratings on key drivers include: **San Antonio, Mexico, women and families with kids.**
  - These segments should be further explored for their potential to be key target segments for SPI.

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Executive Summary

- When compared to other TX beach destinations in terms of best value for the money, **SPI falls short on attractions, shopping and restaurants.**
  - Special efforts should be made to highlighting dining and shopping options in SPI. While not the most important drivers of beach selection, these options can help to set SPI apart from the competition and may be highlighted in social/digital media for purposes of building engagement and interest with SPI.

- Advertising recall of SPI is 37% among those interviewed. This recall is largely driven by **television and magazine recall**; although differences exist among markets.
  - Television and magazine, along with newspaper and billboard advertising in some key markets appears to drive awareness of SPI. These efforts should continue and be tailored to the needs of each of the key maintenance (SA, Austin) and growth markets (Dallas, Midwest, Mexico).

- Overall, respondents from San Antonio and Mexico report the **highest likelihood to visit SPI** in the future. Alternatively, respondents from Minneapolis and DFW report the lowest likelihood to visit.
  - Marketing efforts to these markets must be tailored to address a dual retention and growth strategy moving forward.

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Executive Summary

- Overall, the **biggest drivers** for future visitation to SPI include: Proximity, Clean Beaches, Relaxed Environment, Vacation Deals/Affordability and Information (about what's there and what's new in SPI).
  - Consider creating a detailed marketing communications plan that addresses these key drivers via the most appropriate channels for messaging.

- Overall, the **biggest barriers** for future visitation to SPI include: Distance, Reputation as a Spring Break Location, a Preference for other Beaches and a Lack of Information about SPI.
  - While some of these barriers are difficult to address, SPI should consider building messaging around the idea of creating worth and value for the "extra" drive to SPI, as well as constantly updating information regarding seasonal events, highlights and attractions.

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DETAILED FINDINGS

Among U.S. Markets, the **beach is the most appealing** type of vacation destination. Large cities rank first among Mexican respondents.

What types of vacation destinations are most appealing? The Beach – 88%

- Among U.S. Markets, there are no significant differences between cities regarding the appeal of the beach. Many US markets find beaches significantly more appealing than Mexico.
- Beaches are the #1 most appealing vacation type among all ages but beach appeal drops off among respondents age 55+. These respondents find nature areas and small towns as appealing as beaches.
- Among males, beach and nature destinations top the list, while big cities are less appealing.
- Among females, beaches are most appealing, followed by big cities while nature destinations are least appealing.
- Among all groups Beaches have the highest appeal (92%) among families with kids.

Appeal of Different Vacation Types
% of respondents rating each type as appealing or very appealing n=900

■ Appealing   ■ Very Appealing

Vacation Type	Appealing	Very Appealing	Total
Nature and wildlife areas such national parks and scenic attractions	34%	47%	81%
Large vibrant city rich in entertainment, shopping, and dining	36%	44%	80%
An oceanside or beach destination	27%	60%	88%
Small to medium size city rich in history and a unique culture	43%	36%	79%

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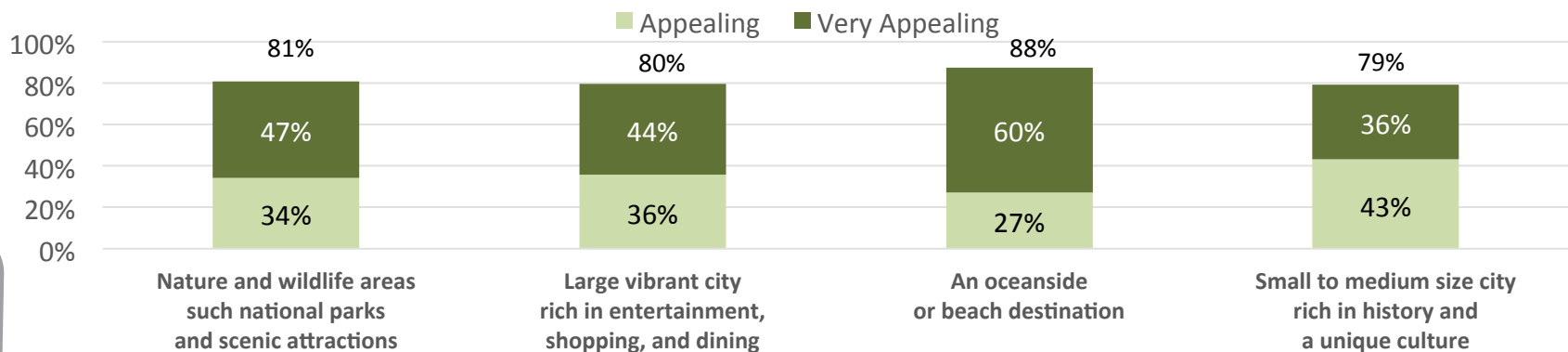
NYC, Vegas and Hawaii top the list in terms of desirable U.S. vacation destinations. Texas beaches together garner 3% of mentions.

- When combined, SPI and all other Texas Beaches were the 26th most mentioned destination.

- Among mentions of Texas beaches, SPI was the most mentioned.

- Groups with highest mentions of TX Beaches include:
  - San Antonio 7%
  - Males 4%
  - 55+ yr. olds 4%
  - Medium income 4%
  - Families with kids 4%
  - Very Frequent travelers 4%

Most Desirable US Vacation Destinations					
% of respondents mentioning each location unaided – n=900					
Rank	Location	% mentions	Rank	Location	% mentions
1	New York City	44%	16	Grand Canyon	10%
2	Las Vegas	23%	17	Colorado (state)	9%
3	Hawaii (state and specific cities)	23%	18	Los Angeles	8%
4	San Francisco	20%	19	New Orleans LA	8%
5	Washington, D.C.	14%	20	Yellowstone National Park	8%
6	Seattle	14%	21	Key West + FL Keys	8%
7	Florida (state)	13%	22	Walt Disney World	5%
8	California (state)	13%	23	Portland OR	5%
9	Chicago	13%	24	Napa Valley CA	4%
10	Alaska (state)	11%	25	Niagara Falls	3%
11	Orlando FL	11%	26	Texas Beaches (SPI, Galveston, Corpus, Port A)	3%
12	Boston MA	10%	27	Destin	2%
13	Miami	10%	28	Glacier National Park	2%
14	San Diego	10%	29	Charleston	2%
15	Texas & Non-coastal Texas Locations	10%	Note: Miscellaneous (fewer than 1% mentions) not shown. All respondents mentioned at least one miscellaneous destination.		

Note: Unaided mentions of SPI did not make it into the top 29 destinations.
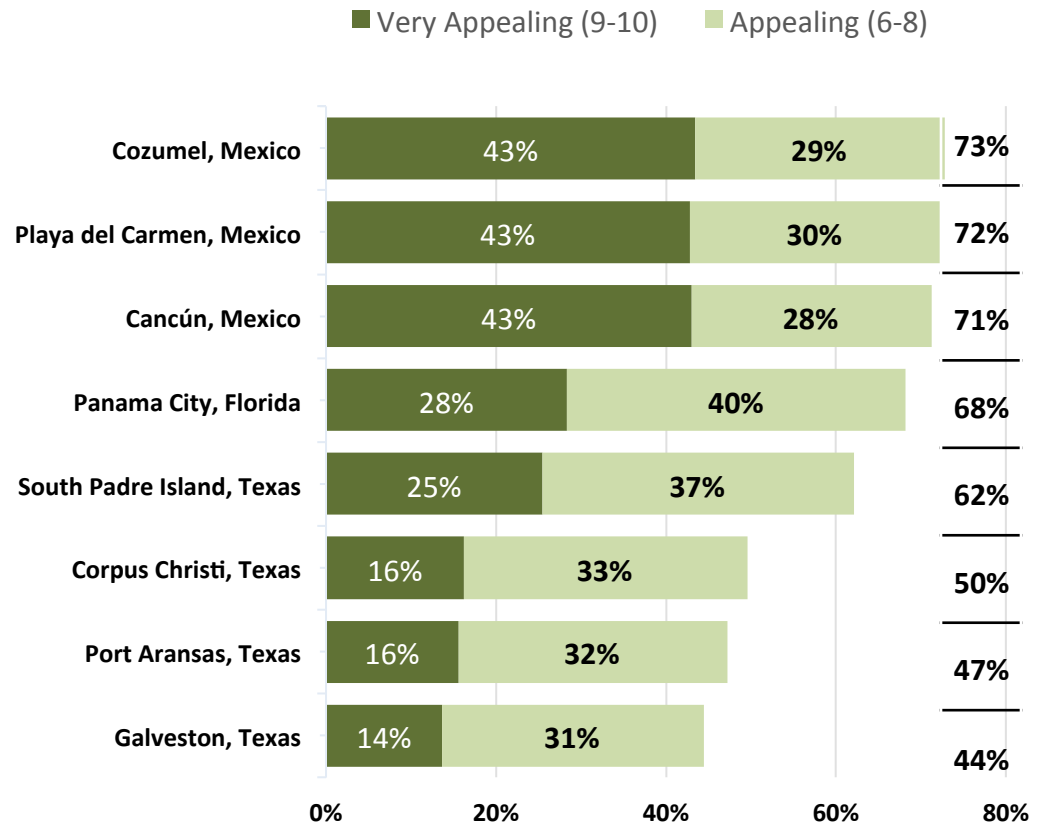
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Among beach destinations, SPI enjoys **solid appeal ratings** and ranks first among Texas beaches tested.

- SPI is the most appealing of all Texas beaches. Compared to other competitive destinations, SPI enjoys similar appeal ratings as Panama City, FL.

- Key Mexican beach destinations have stronger appeal ratings; with strength coming from the "very appealing" ratings.

- Overall, SPI's appeal rating is 62%.

- Groups giving SPI above average appeal ratings are:
  - San Antonio , DFW, & Mexico (65% each)
  - Females (63%)
  - 35-54 yr. olds (63%) 55+ yr. olds (64%)
  - Medium income folks (66%)
  - Families with kids (63%)
  - Frequent travelers (3 trips per year) (71%)

Most Appealing Beaches
% rating the appeal of each beach on a 10 point appeal scale – n=900

■ Very Appealing (9-10)   ■ Appealing (6-8)

Beach	Very Appealing (9-10)	Appealing (6-8)	Total
Cozumel, Mexico	43%	29%	73%
Playa del Carmen, Mexico	43%	30%	72%
Cancún, Mexico	43%	28%	71%
Panama City, Florida	28%	40%	68%
South Padre Island, Texas	25%	37%	62%
Corpus Christi, Texas	16%	33%	50%
Port Aransas, Texas	16%	32%	47%
Galveston, Texas	14%	31%	44%

0%   20%   40%   60%   80%

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Among U.S. markets tested, **San Antoni**o demonstrates the highest appeal ratings for SPI.

- San Antonio has the highest visitation rate to SPI, but also finds SPI highly appealing (31% rank SPI a 9 or 10 on a 10 point scale)
- Overall, DFW and Mexico find SPI as appealing as San Antonio does.

Appeal of SPI by Market
% rating the appeal of each beach on a 10 point appeal scale – Market n=150

■ Very Appealing (9-10) □ Appealing 6-8)

Market	Total	Appealing 6-8	Very Appealing (9-10)
DFW	65%	40%	25%
Austin	60%	33%	27%
Houston	60%	37%	23%
San Antonio	65%	35%	31%
Minneapolis	57%	34%	23%
Mexico	65%	41%	24%

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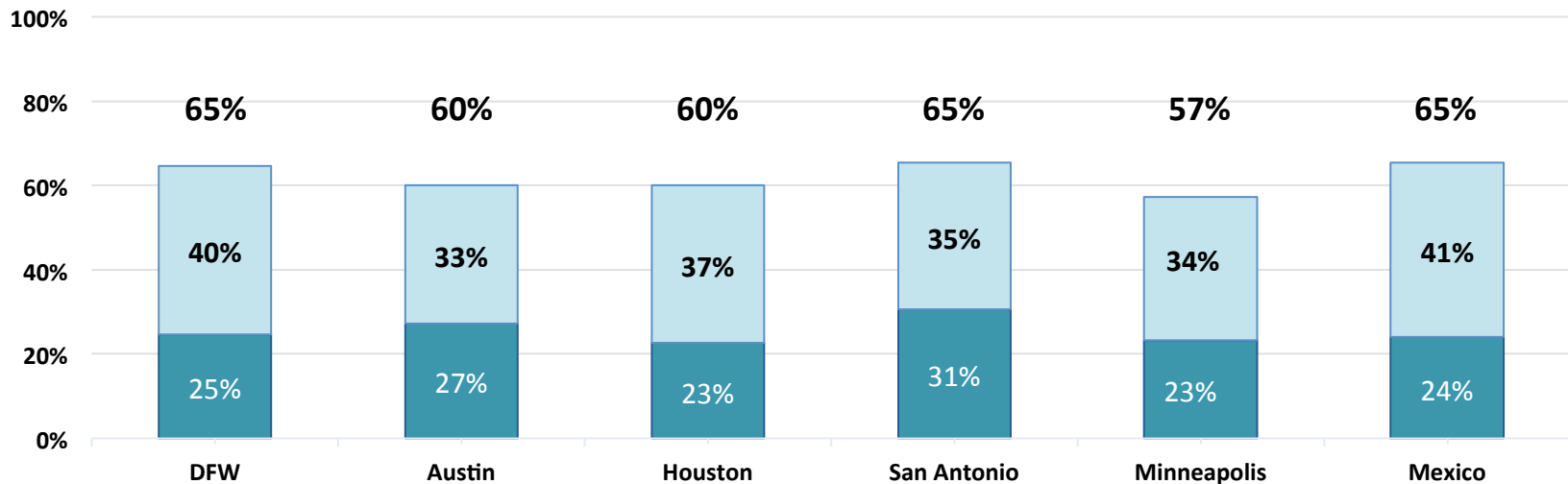
Although SPI enjoys the **highest appeal ratings** among Texas beaches, 42% of respondents have never visited SPI.

- Respondents are much more likely to have visited Corpus or Galveston vs. SPI.
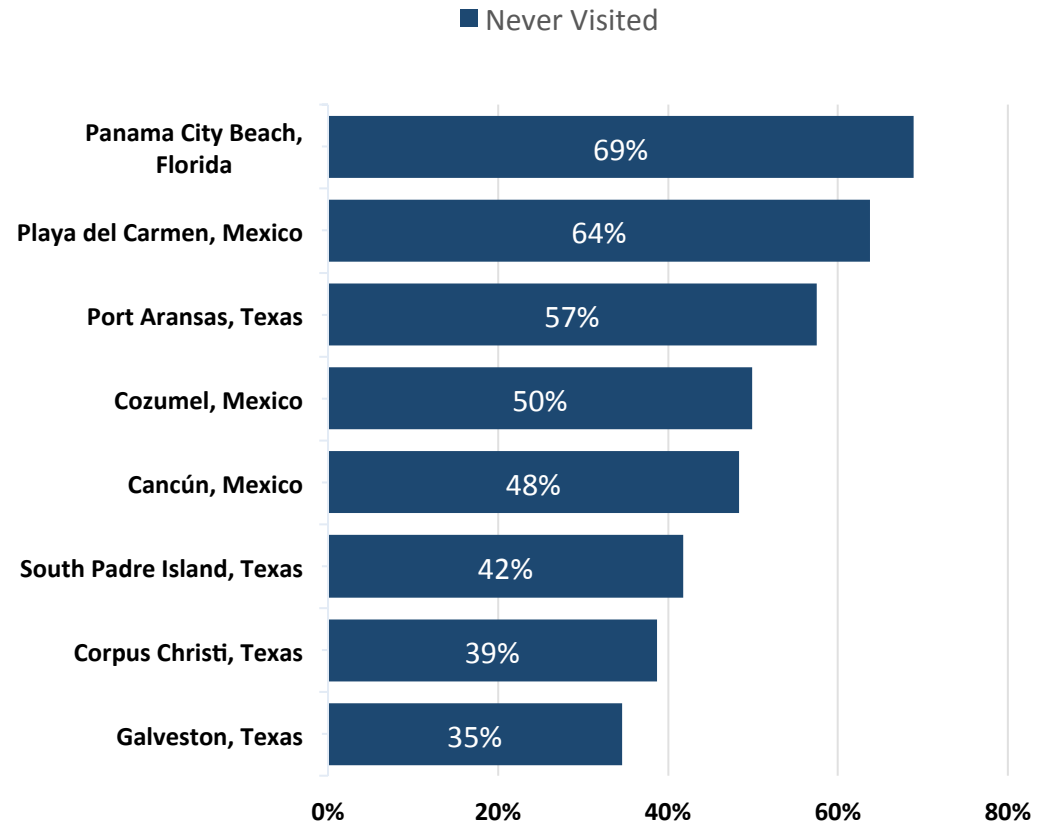
- However, respondents are more likely to have visited SPI vs. key Mexican and FL competitive beaches.

- Groups with the least visit experience with SPI are:
  - Minneapolis (74%)
  - Mexico (43)%
  - Females (44%)
  - 18-34 yr. olds (49%)
  - High income (45%)
  - Families with kids (44%)
  - Average travelers (1-2 trips per year) 45%

Least Visited Beaches
% reporting never visiting each beach – n=900

■ Never Visited

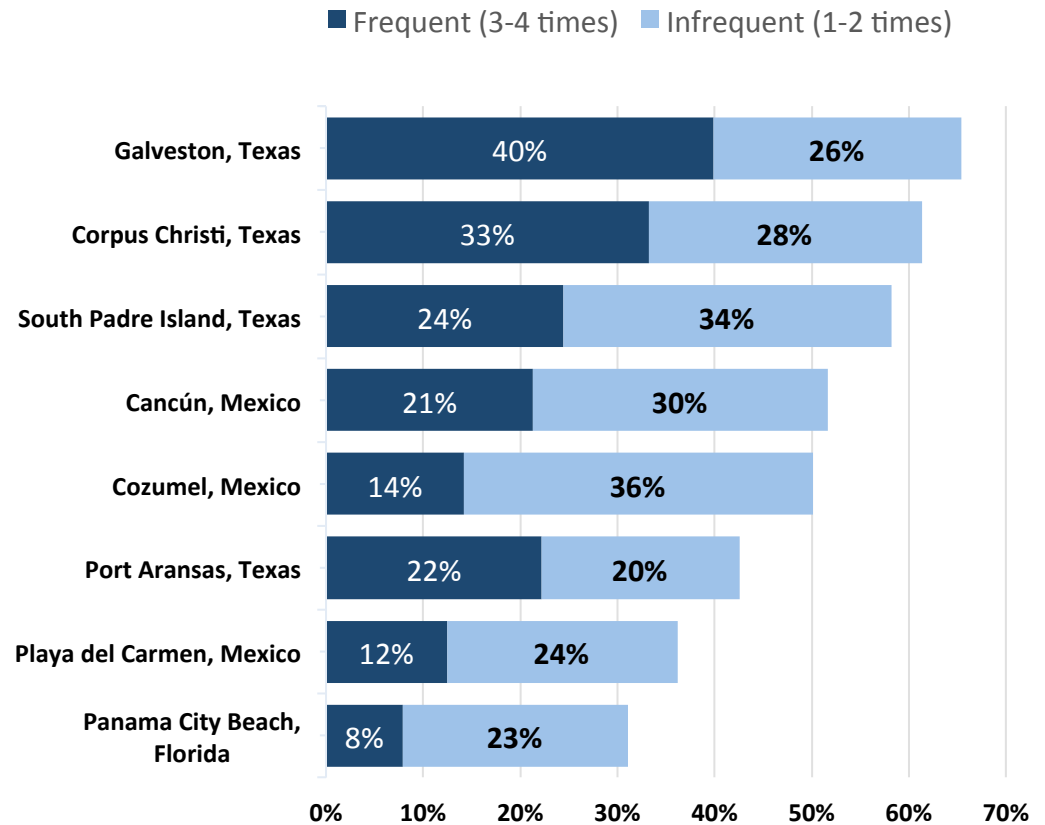| Beach	Never Visited
Panama City Beach, Florida	69%
Playa del Carmen, Mexico	64%
Port Aransas, Texas	57%
Cozumel, Mexico	50%
Cancún, Mexico	48%
South Padre Island, Texas	42%
Corpus Christi, Texas	39%
Galveston, Texas	35%

0%   20%   40%   60%   80%

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South Padre Island is **less visited than Galveston or Corpus Christi**, but significantly beats out Port Aransas in terms of visitation.

- On Average SPI's visit experience rate is 58%.
  - 24% are frequent visits (3-4 times) and 34% are infrequent visits (1-2 times)

- Groups with the highest visit experience with SPI are:
  - Austin (70%)
  - San Antonio (72%)
  - Males (61%)
  - 55+ yr. olds (68%)
  - Medium income (65%)
  - Frequent travelers (3 trips per year) (62%)

Most Visited Beaches
% reporting number of visits to each beach – n=900

Legend: ■ Frequent (3-4 times)   ■ Infrequent (1-2 times)

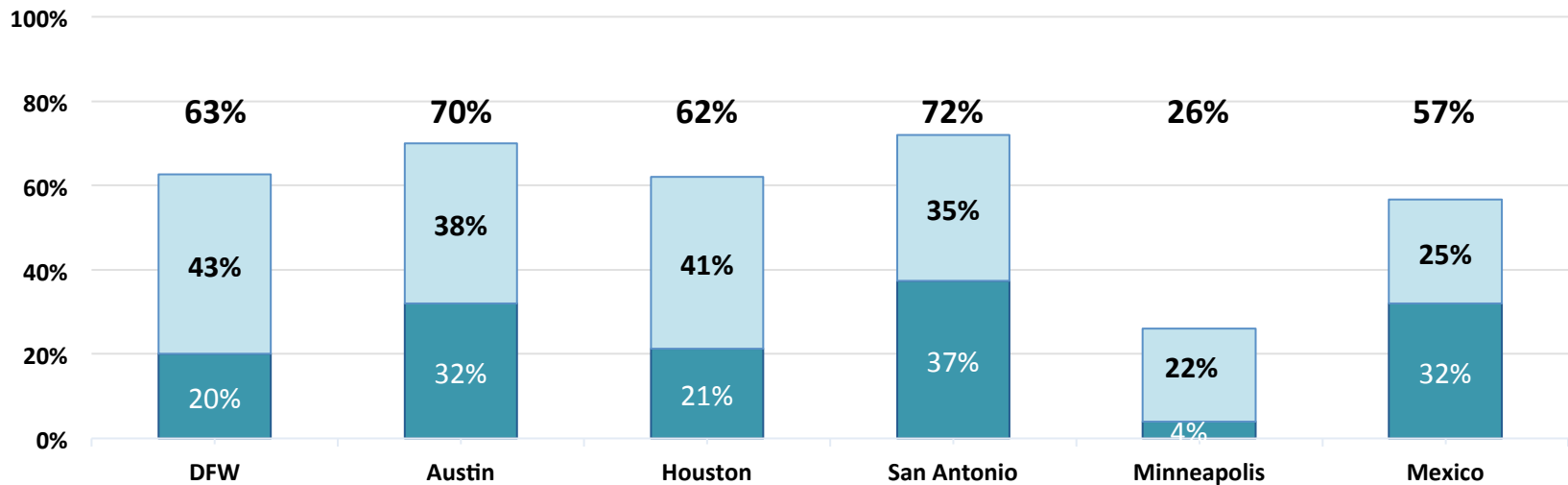| Beach	Frequent (3-4 times)	Infrequent (1-2 times)
Galveston, Texas	40%	26%
Corpus Christi, Texas	33%	28%
South Padre Island, Texas	24%	34%
Cancún, Mexico	21%	30%
Cozumel, Mexico	14%	36%
Port Aransas, Texas	22%	20%
Playa del Carmen, Mexico	12%	24%
Panama City Beach, Florida	8%	23%

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Among markets tested, **San Antonio** has **the most experience** with SPI, while Minneapolis lags in experience.

- Among Texas markets, DFW and Houston have the least experience with SPI.
- Only 57% of respondents from Mexico have visited SPI.
- Only 26% of respondents from Minneapolis have visited SPI.

Visits to SPI by Market
% reporting number of visits to SPI – Market n=150
■ Frequent (3-4 times) □ Infrequent (1-2 times)

| Market	Total	Infrequent	Frequent
DFW	63%	43%	20%
Austin	70%	38%	32%
Houston	62%	41%	21%
San Antonio	72%	35%	37%
Minneapolis	26%	22%	4%
Mexico	57%	25%	32%

Respondents from Minneapolis have the **least experience** with visits to SPI. This is likely driven by the distance to SPI.

- Opportunity exists among Midwest and Mexico markets to increase the experience with SPI.

Non-Visitors to SPI by Market
% reporting never visiting SPI – Market n=150
■ Never Visited SPI

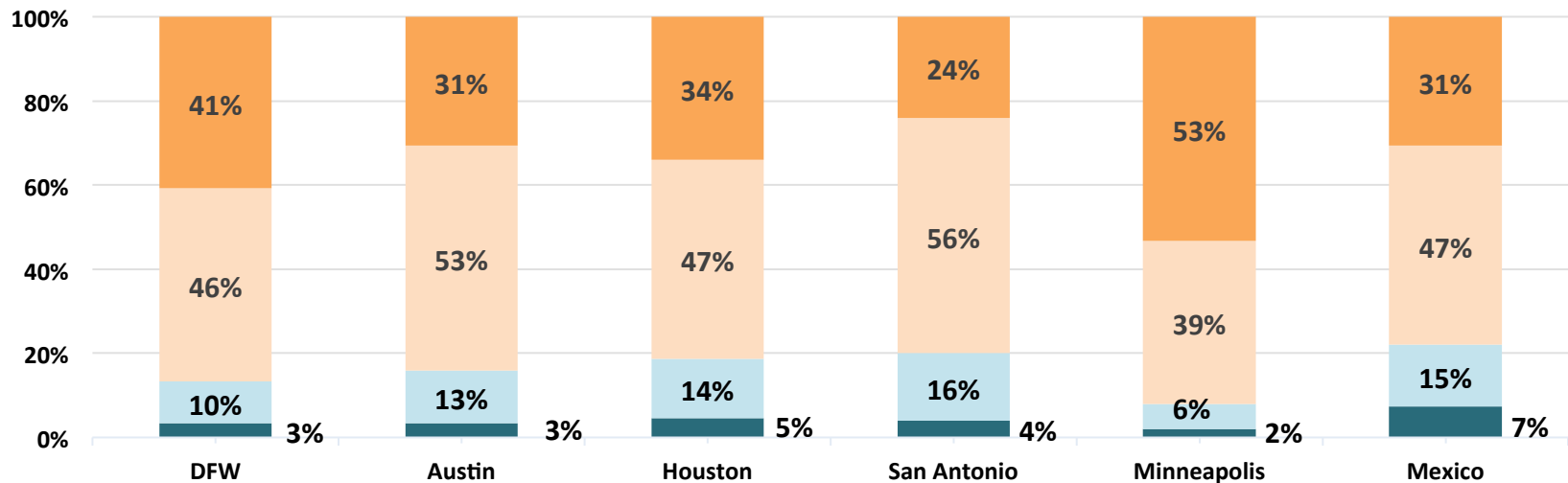| Market	Never Visited SPI
DFW	37%
Austin	30%
Houston	38%
San Antonio	28%
Minneapolis	74%
Mexico	43%

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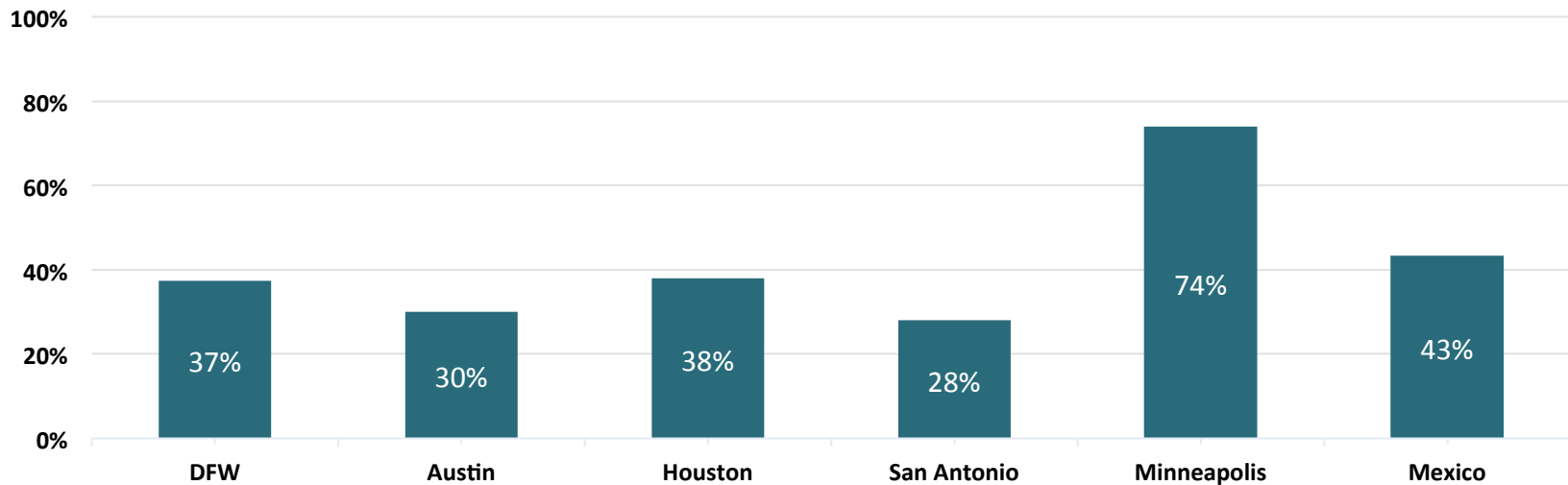
Despite high visitation rates in San Antonio and Austin, more than half of respondents in these markets say they are only "**slightly familiar**" with SPI.

- Familiarity with SPI and what the destination has to offer falls mostly in the "slightly" and "not at all" range.
- Among markets tested, the Mexican markets report the highest levels of familiarity with SPI.

Familiarity with SPI by Market
% rating each level of familiarity with SPI - Market n=150

Legend: ■ Very Familiar ■ Familiar ■ Slightly familiar ■ Not at all familiar

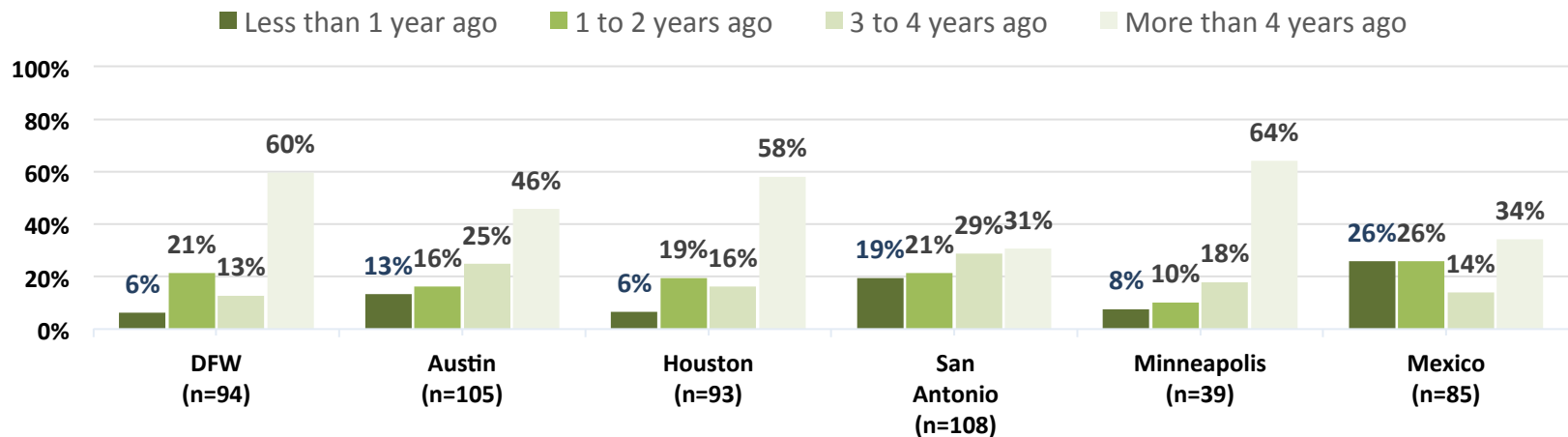| Market	Very Familiar	Familiar	Slightly familiar	Not at all familiar
DFW	3%	10%	46%	41%
Austin	3%	13%	53%	31%
Houston	5%	14%	47%	34%
San Antonio	4%	16%	56%	24%
Minneapolis	2%	6%	39%	53%
Mexico	7%	15%	47%	31%

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Respondents from San Antonio and Mexico demonstrate the **most recent** visits to SPI.

- 52% of Mexican respondents have visited SPI within the past 2 years.
- 40% of San Antonians have visited SPI within the past 2 years.
- Dallas and Minneapolis demonstrate the highest percentages of respondents who visited SPI 4 or more years ago (60% and 64% respectively).
- When looking at age across markets, 18-34 year olds have the highest levels of recent visits to SPI.

Most Recent SPI Visit by Market
% of respondents who have ever visited in each time category by market– n=varies

Legend: ■ Less than 1 year ago ■ 1 to 2 years ago ■ 3 to 4 years ago ■ More than 4 years ago

DFW (n=94): 6%, 21%, 13%, 60%
Austin (n=105): 13%, 16%, 25%, 46%
Houston (n=93): 6%, 19%, 16%, 58%
San Antonio (n=108): 19%, 21%, 29%, 31%
Minneapolis (n=39): 8%, 10%, 18%, 64%
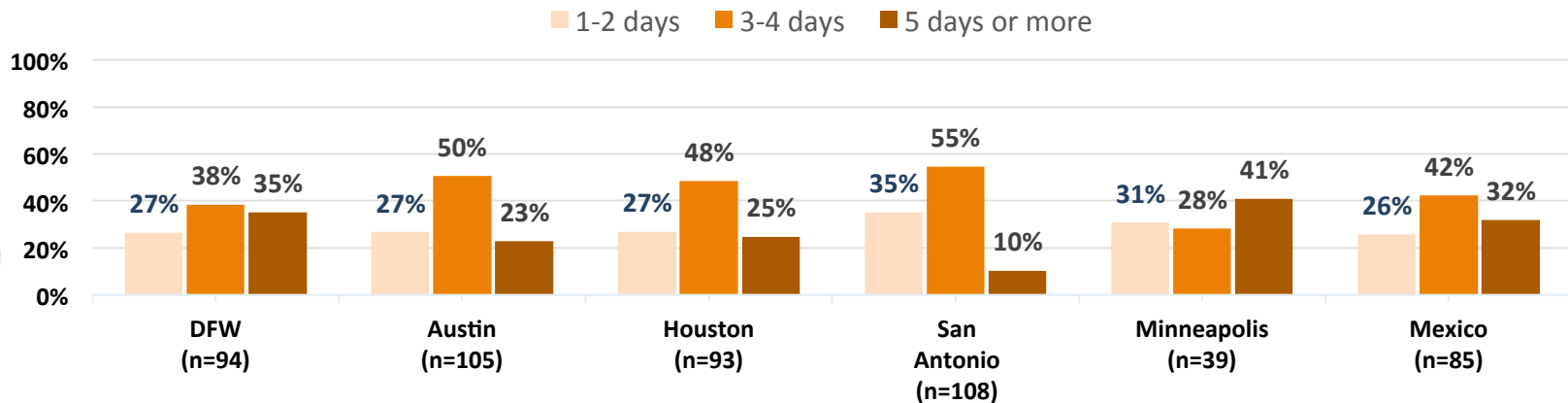Mexico (n=85): 26%, 26%, 14%, 34%

Those traveling from farther away spend **more time and money** in SPI.

- Respondents from Minneapolis and Mexico tend to spend more overall on their visits. However, these expenditures can also be linked to longer stays in SPI.
- On average, respondents from San Antonio spend the most per day in SPI. (with the exception of Mexico).
- When looking at Texas markets, the majority of respondents from Austin, Houston and SA spend 3-4 days in SPI. Dallas visitors tend to spend slightly more time in SPI (likely due to the longer drive).

	DFW	Austin	Houston	San Antonio	Minneapolis	Mexico
Average Total Expenditure of Last Visit	$ 835	$ 807	$ 833	$ 833	$ 1,071	$ 1,209
Average Expenditure per Day of Last Visit	$ 237	$ 251	$ 249	$ 268	$ 267	$ 338

Length of Most Recent SPI Visit by Market
% of SPI visitors spending each length of time on last visit by market– n=varies

Legend: 1-2 days | 3-4 days | 5 days or more

DFW (n=94): 27%, 38%, 35%
Austin (n=105): 27%, 50%, 23%
Houston (n=93): 27%, 48%, 25%
San Antonio (n=108): 35%, 55%, 10%
Minneapolis (n=39): 31%, 28%, 41%
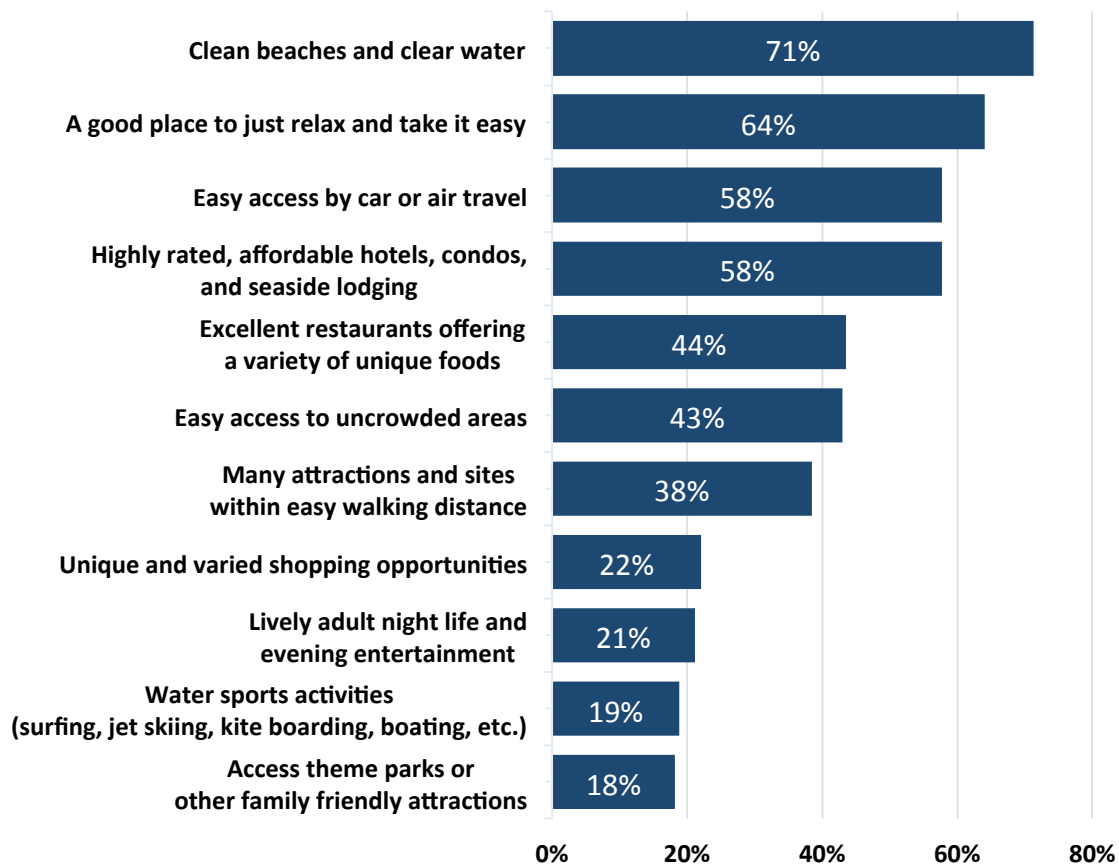Mexico (n=85): 26%, 42%, 32%

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Beach choice drivers center around the **quality of the beach** and the "**relaxation factor**" – both the most important features when choosing a beach.

- 71% of respondents say clean beaches and clear water are the most important features when it comes to choosing a beach.

- Relaxation and taking it easy are important to 64%; interestingly more important than other attractions such as shopping and sites.

- Easy access by car or air is the 3rd most important feature when choosing a beach; this is an area where SPI faces significant challenges.

Most Important Features In Choosing a Beach
% of Top 2 Box Ratings on 10-point Importance scale – n=900

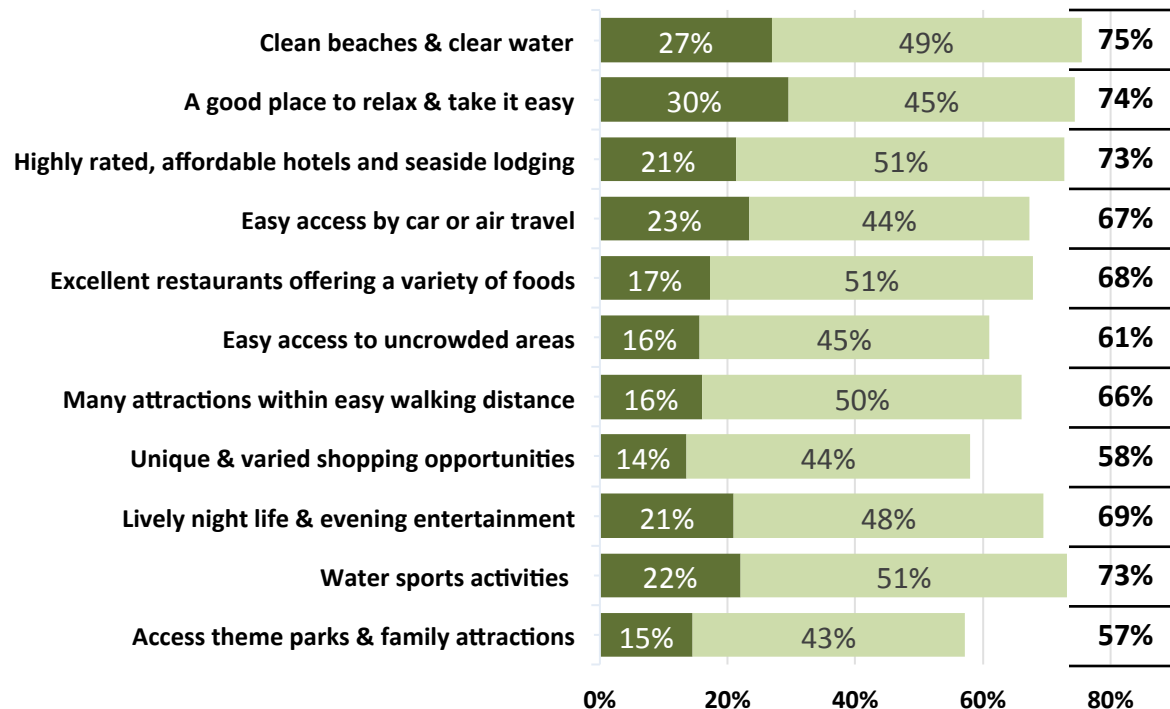| Feature	%
Clean beaches and clear water	71%
A good place to just relax and take it easy	64%
Easy access by car or air travel	58%
Highly rated, affordable hotels, condos, and seaside lodging	58%
Excellent restaurants offering a variety of unique foods	44%
Easy access to uncrowded areas	43%
Many attractions and sites within easy walking distance	38%
Unique and varied shopping opportunities	22%
Lively adult night life and evening entertainment	21%
Water sports activities (surfing, jet skiing, kite boarding, boating, etc.)	19%
Access theme parks or other family friendly attractions	18%

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SPI performs well on the **top 3 beach drivers** – with ratings over 70% as good/excellent on these top 3 drivers.

- SPI has solid ratings on the top beach drivers.

- Groups that give SPI the highest "excellent" ratings across the board are:
  – San Antonio
  – Mexico
  – Women
  – Families with kids

- Some differences in ratings to note:
  – Older respondents give SPI the best ratings on clean beaches and water.
  – Younger respondents give SPI the best ratings on water sports, theme parks and night life.

- Interestingly, while SPI often advertises activities and attractions, ratings are not as high on these drivers.

SPI Ratings on Most Important Beach Attributes
% of Excellent (9-10) & Good (6-8) ratings on each attribute on 10-point excellence scale
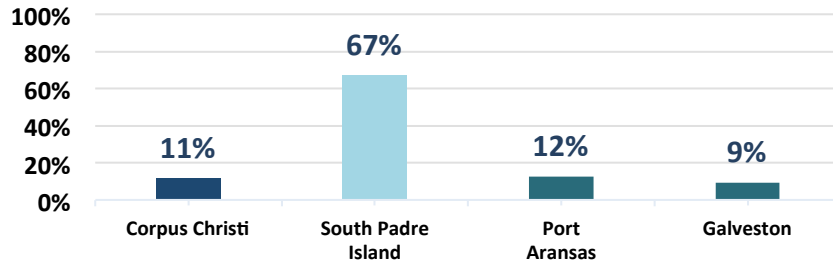n=900

Attribute	Excellent	Good	Total
Clean beaches & clear water	27%	49%	**75%**
A good place to relax & take it easy	30%	45%	**74%**
Highly rated, affordable hotels and seaside lodging	21%	51%	**73%**
Easy access by car or air travel	23%	44%	**67%**
Excellent restaurants offering a variety of foods	17%	51%	**68%**
Easy access to uncrowded areas	16%	45%	**61%**
Many attractions within easy walking distance	16%	50%	**66%**
Unique & varied shopping opportunities	14%	44%	**58%**
Lively night life & evening entertainment	21%	48%	**69%**
Water sports activities	22%	51%	**73%**
Access theme parks & family attractions	15%	43%	**57%**

0%   20%   40%   60%   80%

MACHETE

When compared to other Texas beaches, SPI **wins on 3 of the top 4** drivers in terms of best value for what you pay.

- SPI is ranked as best for clean beaches/clear water, a place to relax and best hotels / lodging.
- SPI falls behind other destinations for accessibility. Interestingly, Port A is ranked below SPI in terms of easy access – this may be due to relatively low awareness of Port A and/or the ferry travel.
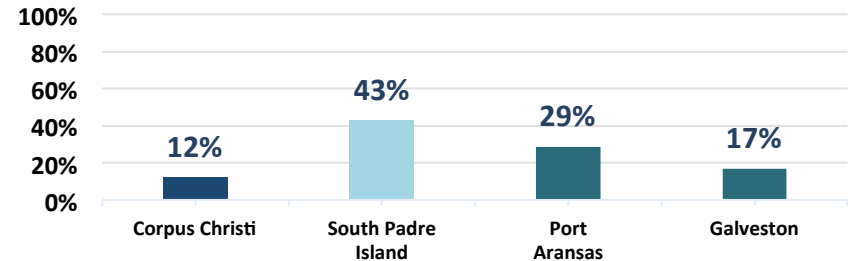
1 Cleanest beaches & clearest water
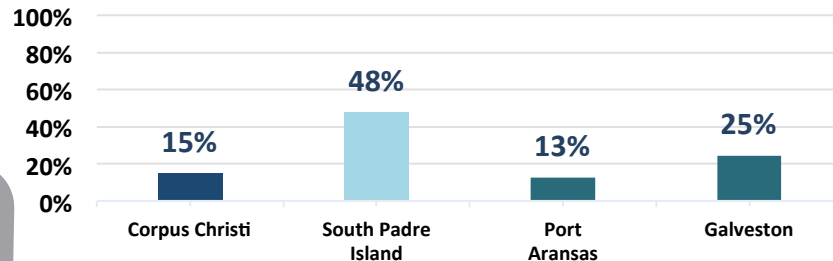% each beach as best value for attribute – n=900

Corpus Christi	South Padre Island	Port Aransas	Galveston
11%	67%	12%	9%

2 Best place to just relax & take it easy
% each beach as best value for attribute – n=900

Corpus Christi	South Padre Island	Port Aransas	Galveston
12%	43%	29%	17%

3 Best hotels and seaside lodging
% each beach as best value for attribute – n=900

Corpus Christi	South Padre Island	Port Aransas	Galveston
15%	48%	13%	25%

#4 Easiest access by car or air travel
% each beach as best value for attribute – n=900

Corpus Christi	South Padre Island	Port Aransas	Galveston
28%	21%	9%	42%

MACHETE
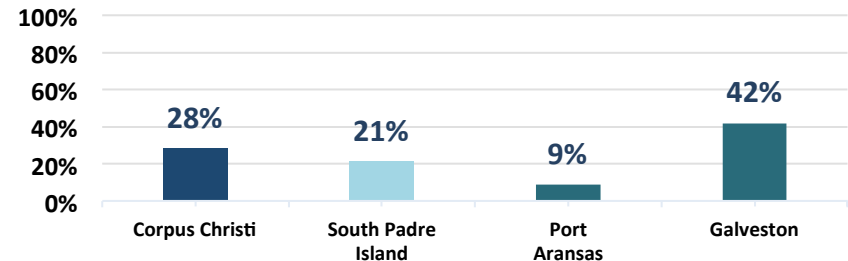
SPI is performs well in terms of access to **uncrowded beaches** and attractions within walking distance.

# 5 - Dallas, SA and Austin rank SPI restaurants higher than those from Houston.
#6 - ALL the Texas markets agree on this. Minnesotans and Mexican respondents rank SPI lower.
7 - SPI beats out other beaches on attractions that are walkable, across markets.
8 - SPI does not receive strong ratings for shopping opportunities vs. other beach locations in Texas.
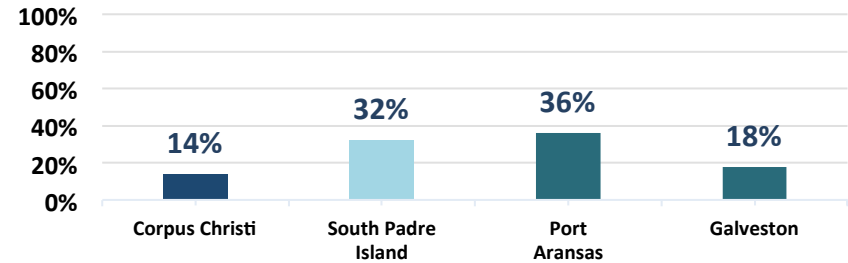
5 Best restaurants & variety of foods
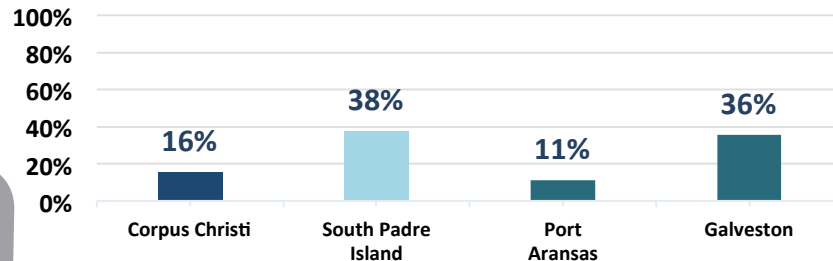% each beach as best value for attribute – n=900

Corpus Christi	South Padre Island	Port Aransas	Galveston
22%	32%	10%	36%
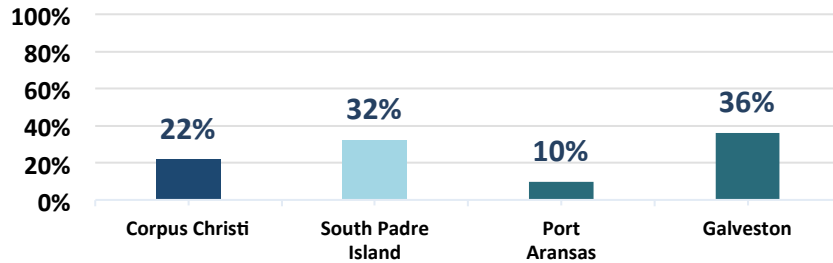
6 Best access to uncrowded areas
% each beach as best value for attribute – n=900

Corpus Christi	South Padre Island	Port Aransas	Galveston
14%	32%	36%	18%

7 Most attractions in walking distance
% each beach as best value for attribute – n=900

Corpus Christi	South Padre Island	Port Aransas	Galveston
16%	38%	11%	36%

8 Best shopping opportunities
% each beach as best value for attribute – n=900

| Corpus Christi	South Padre Island	Port Aransas	Galveston
32%	24%	8%	37%

MACHETE
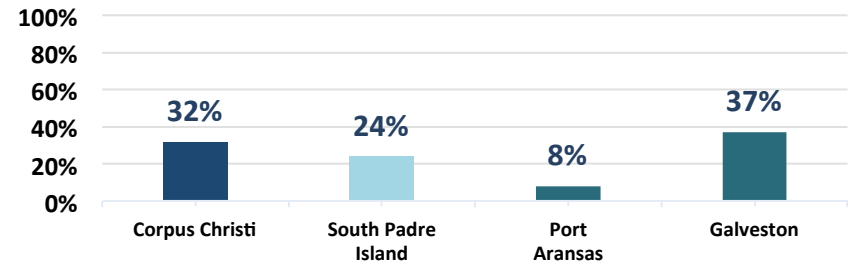
While SPI ranks high on **night life** and **water sports**, these attributes are not as important in choosing a beach location.

#9, #10 - SPI's rankings on night life, entertainment and water sports are very high. Efforts to boost the importance of these attributes may be necessary to increase appeal.

#11 - SPI ranks below Galveston for theme parks and attractions. Mexico, Minneapolis and SA respondents rate this higher than other markets.
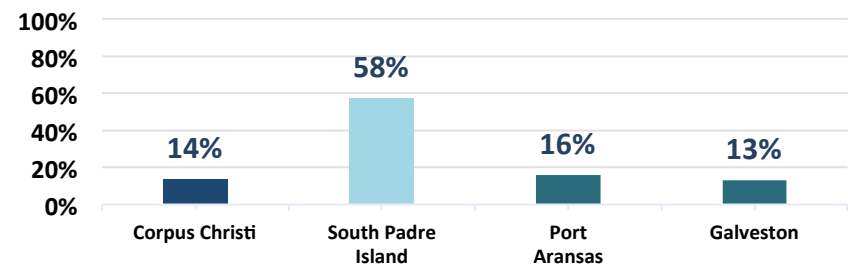
9 Best night life & entertainment
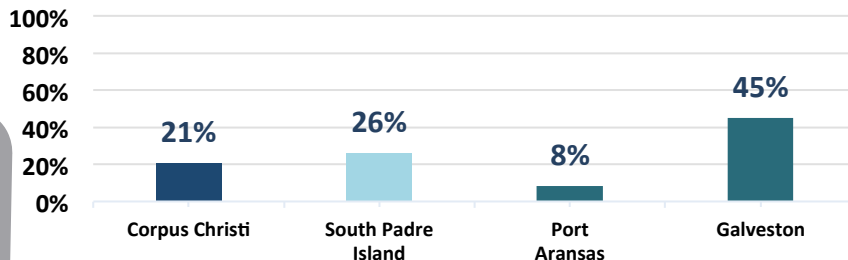% each beach as best value for attribute – n=900

Corpus Christi	South Padre Island	Port Aransas	Galveston
16%	54%	5%	25%
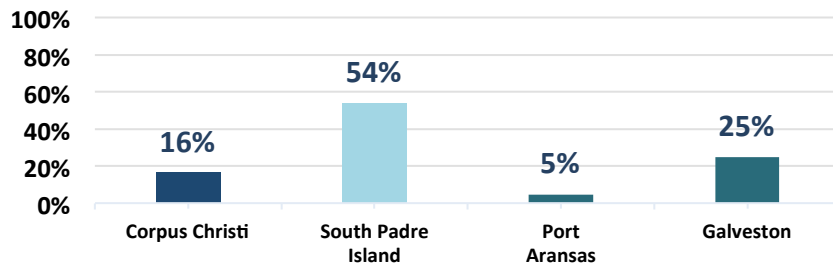
10 Best Water sports activities
% each beach as best value for attribute – n=900

Corpus Christi	South Padre Island	Port Aransas	Galveston
14%	58%	16%	13%

11 Best theme parks & family attractions
% each beach as best value for attribute – n=900

Corpus Christi	South Padre Island	Port Aransas	Galveston
21%	26%	8%	45%

MACHETE

Opportunity exists for SPI to boost ratings in areas considered high importance. While SPI performs well, there is **room for improvement** in key areas such as beach quality, relaxation, hotels, easy access and restaurants.

Legend:
- Clean beaches & clear water
- A good place to relax & take it easy
- Highly rated, affordable hotels and seaside lodging
- Easy access by car or air travel
- Excellent restaurants offering a variety of foods
- Easy access to uncrowded areas
- Many attractions within easy walking distance
- Unique & varied shopping opportunities
- Lively night life & evening entertainment
- Water sports activities
- Access theme parks & family attractions

Attribute Importance (y-axis): 5.00 to 9.00
SPI Performance (x-axis): 5.00 to 9.00

Quadrant labels:
- High Importance Low Performance
- High Importance High Performance
- Low Importance Low Performance
- Low Importance High Performance

MACHETE
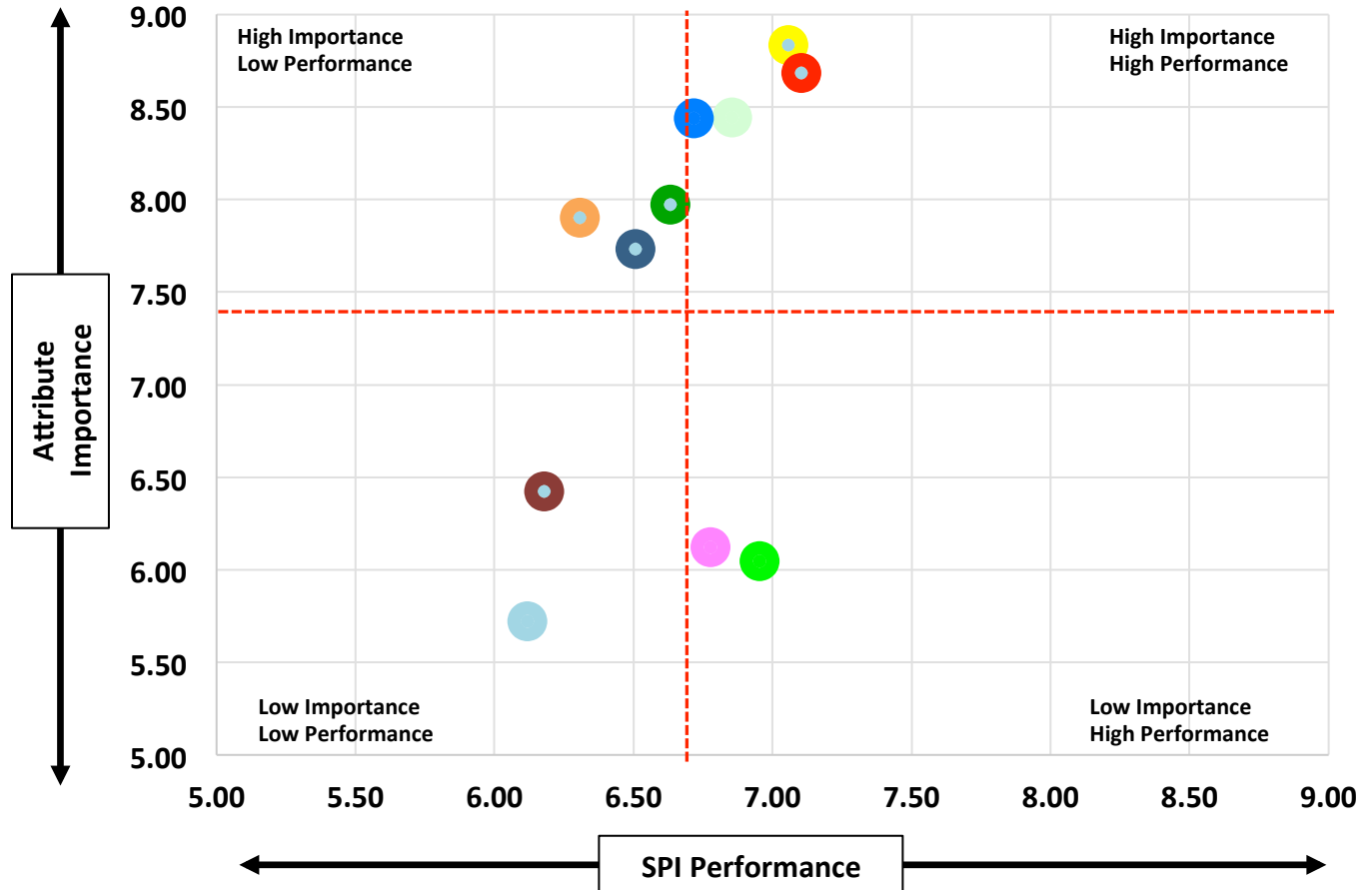
Overall SPI ad recall is 37%. Among those who recall advertising, **television and magazine** recall is the highest

- Overall, highest ad recall is: Austin, 41%, Houston 48%, SA 45%, and Mexico 41%
- Among higher income respondents, overall ad recall is 44%. It is also 44% among those ages 55+.
- Among younger respondents (18-34), there is higher ad recall of billboards, radio and social media vs. other age groups.
- Newspaper recall is highest among respondents ages 35+ and in Mexico.
- Word-of-mouth appears to play a role in recall of SPI, particularly in San Antonio and Mexico.
- Houston is significantly higher than Austin, SA or Minneapolis in terms of recall of social media related to SPI.
- Billboard ad recall is highest in Austin, San Antonio and Mexico.

Recalled SPI Advertising
% who recall seeing or hearing ads promoting SPI n=900

- Yes
- No

37%

63%
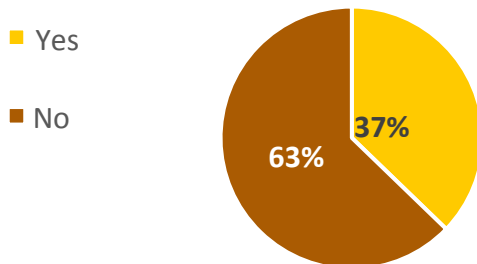
SPI Ad Recall by Media Channel
% of respondents recalling advertising for SPI by each media channel
n=325

Media Channel	%
TV	46%
Magazines	34%
Word of mouth	27%
Social Media	20%
Newspaper	19%
Radio	14%
Billboards	10%
Online banner or pop-up	8%
Direct Mail Piece/Mailer	4%
Miscellaneous	3%

MACHETE
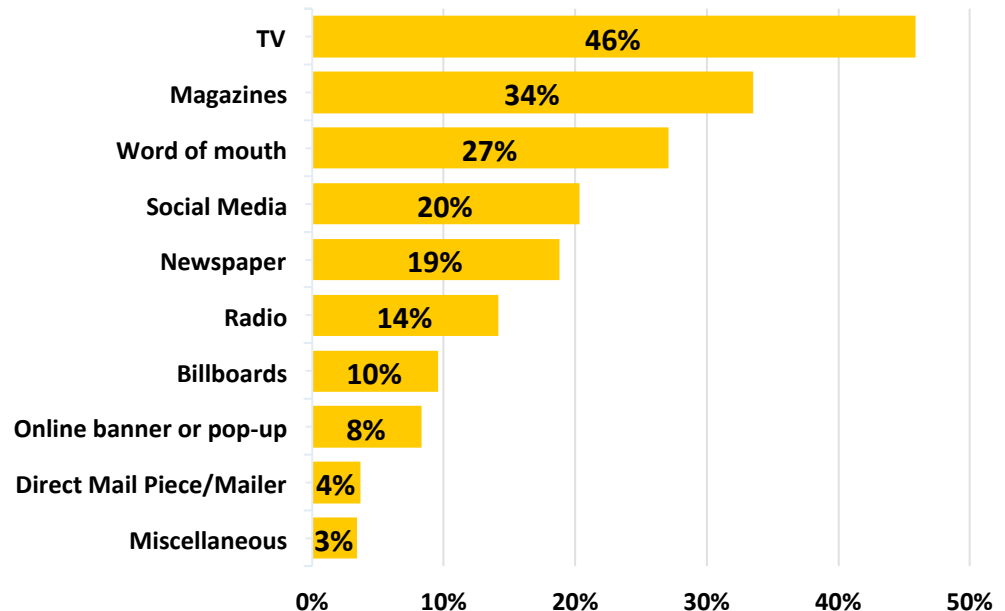
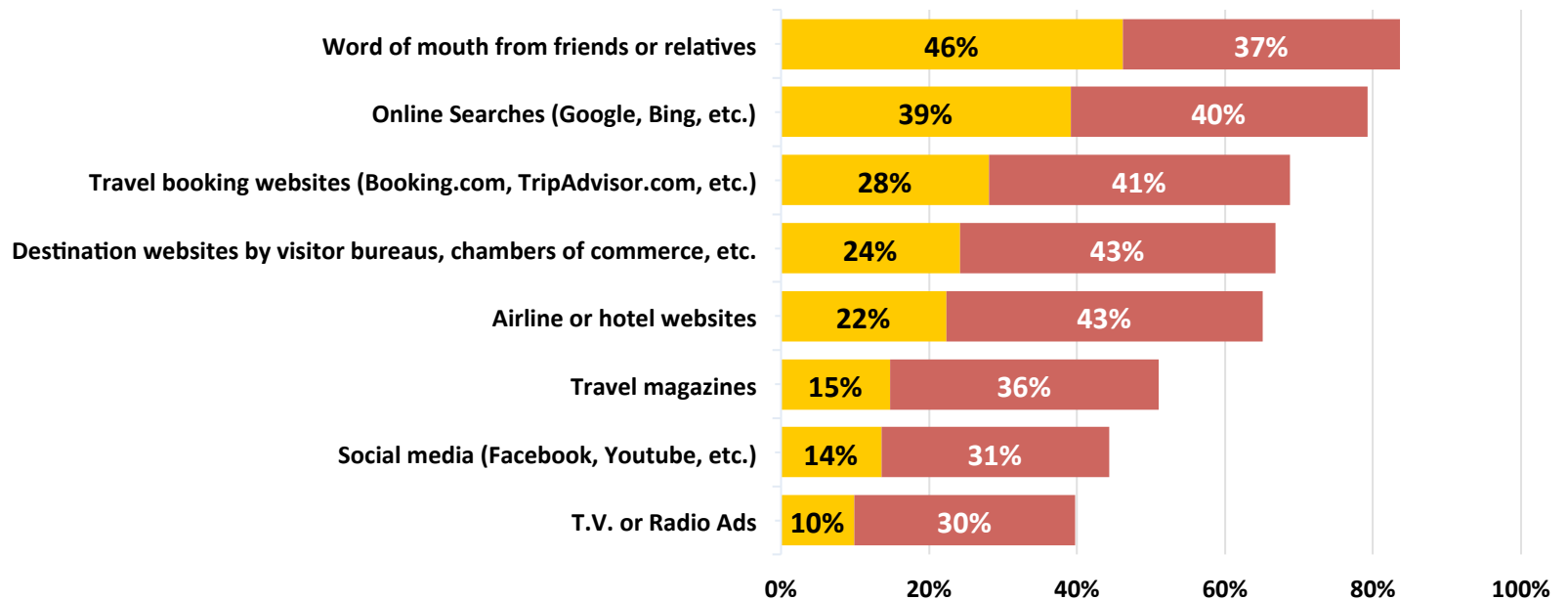# **Word-of-mouth** and **online** resources (searches and websites) are considered the most important vacation information resources.

- When considering the importance of different information sources for vacations, word-of-mouth proves to me the most important resource across markets and segments.
- Online searches and travel booking sites/destination websites are also considered important.
- Television and radio ads are considered least important as information sources.
- Among all segments, females rate each of these information sources as more important than males.

Important Vacation Info Sources
% of respondents rating each source as very important or important on a 10 point scale n=900

| Source	Very important	Important
Word of mouth from friends or relatives	46%	37%
Online Searches (Google, Bing, etc.)	39%	40%
Travel booking websites (Booking.com, TripAdvisor.com, etc.)	28%	41%
Destination websites by visitor bureaus, chambers of commerce, etc.	24%	43%
Airline or hotel websites	22%	43%
Travel magazines	15%	36%
Social media (Facebook, Youtube, etc.)	14%	31%
T.V. or Radio Ads	10%	30%

MACHETE

Respondents from San Antonio and Mexico are the **most likely** to consider visiting SPI during the next 3 years.

- Respondents from Houston, Austin and DFW are similar in their likelihood to visit SPI during the next 3 years.
- Respondents from Minneapolis are least likely to visit in the next 3 years.
- Families with children are more likely to visit vs. those without children.

Likely to Visit SPI within Next 3 Years
% of respondents in each market rating themselves as likely or very likely to visit SPI in next 3 years – Market n=150

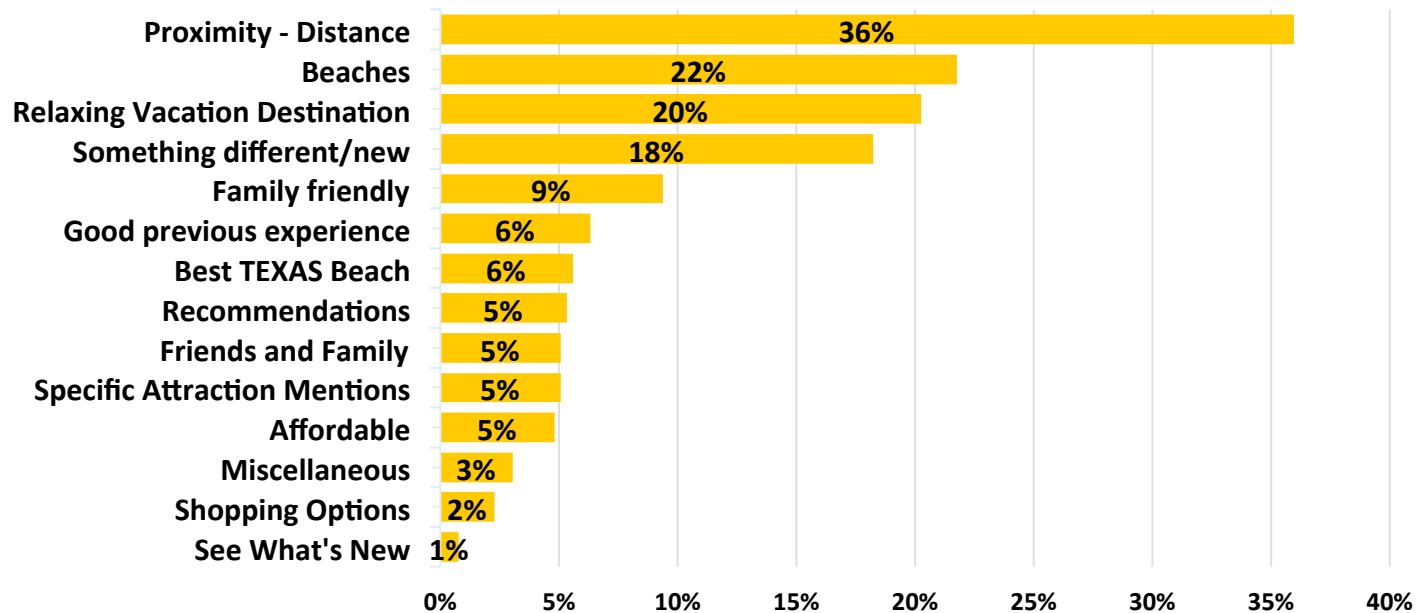| Market	%
San Antonio	58%
Mexico	54%
Houston	46%
Austin	46%
DFW	44%
Minneapolis	21%

MACHETE
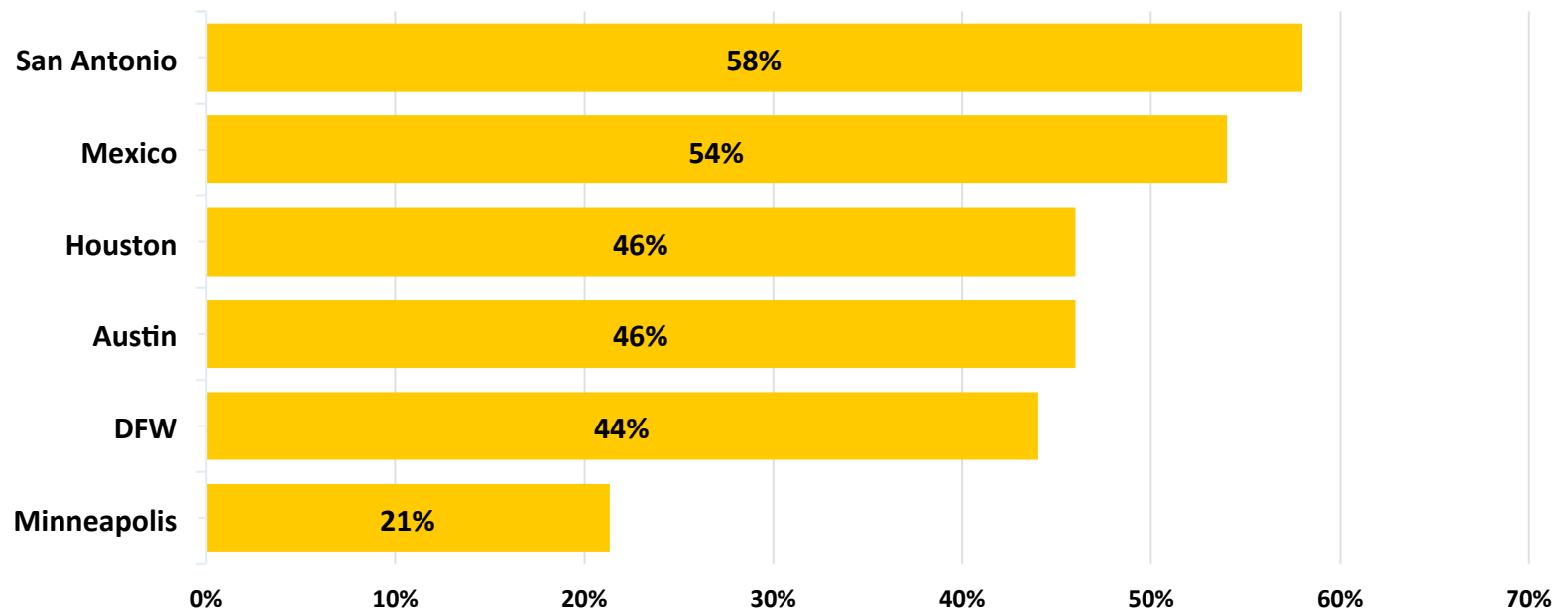
The **proximity** of SPI to home is the reason mentioned most often as a driver for future visits to SPI.

- Open-end responses are aligned with key beach choice drivers. The beach itself and the idea of a relaxing vacation are key reasons why respondents report they will visit SPI in the future.
- Mentions of SPI as "the best beach in TX" are lower than overall comments about the quality of the beach and water when related to SPI.

Reasons Why Future Visit is Likely
% of likely visitors mentioning a reason in each category – multiple mentions allowed n=87

Category	Percentage
Proximity - Distance	36%
Beaches	22%
Relaxing Vacation Destination	20%
Something different/new	18%
Family friendly	9%
Good previous experience	6%
Best TEXAS Beach	6%
Recommendations	5%
Friends and Family	5%
Specific Attraction Mentions	5%
Affordable	5%
Miscellaneous	3%
Shopping Options	2%
See What's New	1%

MACHETE

Sampling of open-end responses for why future SPI visitation is likely

It is a close drive from the Austin area. Not a lot of traffic to deal with either.

I love the water & beach life. Since I haven't been to South Padre Island in a long time, I'd like to check it out to see what it now offers.

Great beach, great weather, year-round activities

Nice beach, easy to access, relaxed lifestyle

It sounds like a good, relaxing vacation and I've never vacationed on an island so I think that would be really cool.

Nice beaches and some good multi-family accommodations

I consider it one of Texas' best beaches. Though it's a little out of the way, it's worth the drive!

It is relatively close to where I live. The prices are reasonable. The beach is beautiful.
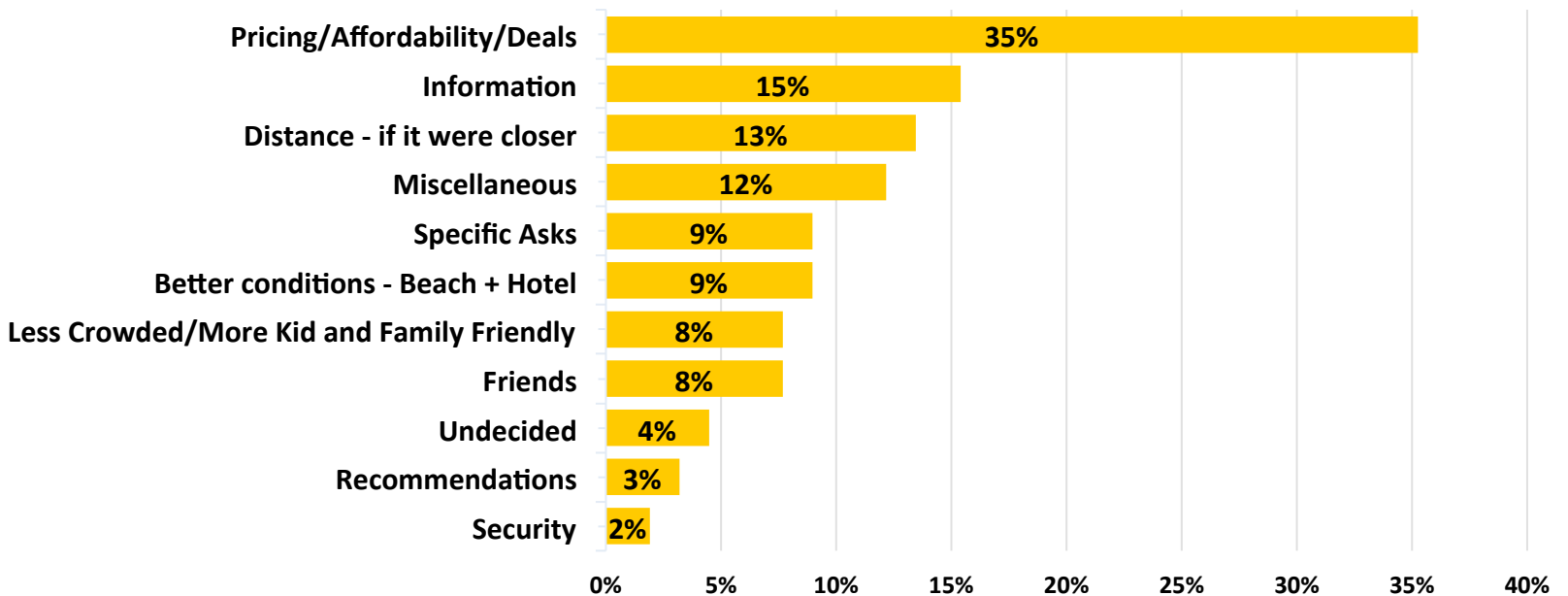
The beaches are clean, it's easy to get to more of the secluded beaches, and we've always had a great experience visiting South Padre.

MACHETE

Among those who are undecided about visiting SPI in the future, **pricing** and **affordability** are key factors to influence visitation.

- Affordable options, competitive prices and deals on vacations would impact the "Undecided" market to visit SPI. This is particularly true among Austin and Mexico respondents.
- Additionally, information regarding SPI would help to influence visitation. Respondents from Minneapolis and Mexico mention "information" more often than other respondents.

What Would Make Undecideds Want to Visit SPI
% of Un-decided visitors mentioning a reason in each category – multiple mentions allowed n=156

Category	Percentage
Pricing/Affordability/Deals	35%
Information	15%
Distance - if it were closer	13%
Miscellaneous	12%
Specific Asks	9%
Better conditions - Beach + Hotel	9%
Less Crowded/More Kid and Family Friendly	8%
Friends	8%
Undecided	4%
Recommendations	3%
Security	2%

MACHETE

Sampling of open-end responses of what would convince "undecideds" to visit SPI

As a teacher, my time off is Spring Break. I do not want to be in South Padre Island with all the Spring Breakers. If I changed jobs and could go a month earlier or later......still need it to be warm!

If it were closer and I could get a good deal on a flight down there

More family friendly and easier access from Houston

Good deal on a hotel, more information on what there is to do there.

Word of mouth and recommendations from others.

A great discount on a great hotel

I would be more likely to visit South Padre Island if I found out more about it's attractions apart from the beaches and the wildlife center. I don't currently know what else there is to do there.

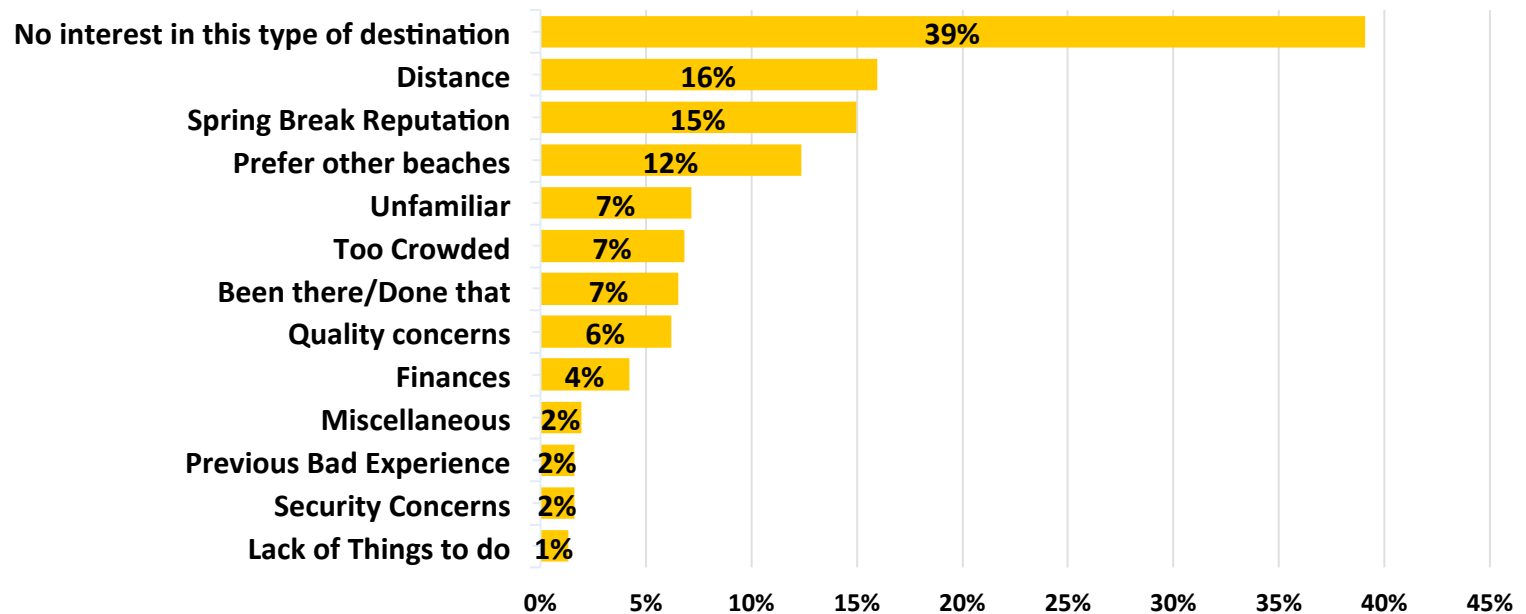We've been to Texas several times, there are just other places we want to visit.

If I lived closer. It's about as far as a beach can be from me in Texas

MACHETE

Among those who are unlikely to visit SPI, there appears to be a **lack of interest** in this type of destination. Distance to SPI is another key barrier.

- While SPI cannot address the "type" of destination barrier, distance proves to be they key reason for NOT visiting SPI in the future.

- Additionally, the Spring Break reputation of SPI is a barrier for visitation.

- Preference for other beaches is a barrier for future visitation.

Reasons for Unlikely to Visit SPI
% of unlikely visitors mentioning a reason in each category – multiple mentions allowed n=307

Reason	%
No interest in this type of destination	39%
Distance	16%
Spring Break Reputation	15%
Prefer other beaches	12%
Unfamiliar	7%
Too Crowded	7%
Been there/Done that	7%
Quality concerns	6%
Finances	4%
Miscellaneous	2%
Previous Bad Experience	2%
Security Concerns	2%
Lack of Things to do	1%

MACHETE

Sampling of open-end responses of why respondents are unlikely to visit SPI

I feel like it a party town where college kids go and I'm out of that stage in my life. I go to relax now when I'm on vacation.

I do not go to beaches very often and am getting to old for night life

Prefer to travel out of state for beach vacations

It was dirty and felt unsafe during my last visit.

We go to Galveston regularly. South Padre has no differential attraction to justify turning a short drive into a long trip.

Too hot and I don't "do" beaches!

Have found beaches that we like better - namely, Port Aransas! Prefer quieter beach - South Padre seemed like one big Spring break/frat party! Not what we are looking for!

I don't know anything about it or that it would be a vacation destination

It is a very long way to drive; Port Aransas and Galveston are easier/ faster to reach

MACHETE

Thank you
For questions or concerns, please contact us directly.