



South Padre Island Convention & Visitors Bureau

Comprehensive Travel & Tourism
Research Study

Market Research Report & Analysis

Research Conducted:
January – June, 2001

Report Prepared:
 Mooresville, North Carolina
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NOTE: Tourism has its own industry specific vocabulary. While reading this report you may encounter some of these unusual words or anagrams. The definitions of these tourism industry words, phrases and terms can be found in Section 10 of this report titled "Glossary of Terms".

Introduction

Tourism in Texas is big business. It is also big business in Cameron County. The most recent figures (1999) from the Texas Department of Economic Development, Tourism Division estimate that Texas tourism is a \$36.7 billion-dollar industry (domestic plus international expenditures). Of this total, Cameron County generated \$436.29 million in revenues for a 1.18% market share for the State of Texas. Cameron County ranks ninth of the 254 counties in Texas in terms of economic impact from travel and tourism. These statistics are impressive considering that Cameron County is one of the southernmost points in the continental United States.

Traditionally, the development of tourism has simply been equated with "promote it and they will come" or "build it and they will come." As the potential for "growing" tourism increases and the competition between states and destination areas escalates, it is essential that destination-marketing organizations (DMO's) do the following:

- assess their product
- identify the preferences of their customers
- identify the carrying capacity of the available resources
- develop strategies and tactics that will insure success in the future.

The successful marketing programs and tourism product development efforts of the future will ensure that the expectations of residents and visitors are matched or exceeded by high quality experiences.

The South Padre Island Convention and Visitors Bureau (SPICVB) faces unique challenges in the promotion and development of its tourism products. Located on the Gulf Coast at the southern tip of Texas, Cameron County is the least accessible coastal area of Texas for travelers. While it is in a remote location, South Padre Island and Port Isabel draw visitors from throughout Texas and the United States. The beach community combined with the local historic and nature related sites of Cameron County make the South Padre Island area one of the most popular vacation destinations in the state. There is truly something here for everyone. The area is popular for vacations, business meetings and retirement. The SPICVB has a great story to tell...a story that people throughout the United States are eager to hear. The challenge for the SPICVB is to be very strategic in its marketing to attract the right visitors at the right times of year to generate the highest economic impact for the area without overloading the infrastructure (carrying capacity) and diminishing the overall guest experience and quality of life.

Introduction

The marketing plan included in this report addresses methods to identify key target markets and continue the strategic process of inviting people to come see and learn about the relaxing coastal vacation that the South Padre Island area offers. The goal will be to increase visitation and economic impact to support improved quality of life throughout the county.

The SPICVB is wise to conduct research to determine the current economic impact and potential for increased visitation to the area. With so many visitors visiting Texas annually it only makes sense for all areas of Cameron County to capitalize on increasing their share of the economic impact from Texas' second largest industry – tourism.

The enclosed report was developed utilizing professional research and reconnaissance methods developed by Dr. Larry Gutske, Ph.D, North Carolina State University. The report analyzes the current status of tourism in the South Padre Island and Port Isabel area, the current visitor profile and perception of those visiting the area and presents a strategic plan for the future development and growth of tourism for this coastal community.

Study Objectives & Methodology

Study Objective:

The objective of this study was to conduct comprehensive tourism research to provide a foundation for the South Padre Island Convention and Visitors Bureau's marketing planning. The South Padre Island Convention and Visitors Bureau retained Randall Travel Marketing, Inc. of Mooresville, North Carolina to conduct this study. The findings and recommendations of the study will be utilized and considered for implementation by the South Padre Island Convention and Visitors Bureau.

Study Methodology:

Research was conducted in and around the South Padre Island area during the six-month period of January through June 2001. Many methods of data collection were used.

1. Initial Meeting and Materials Gathering:

Initial meetings were conducted between South Padre Island CVB officials and Randall Travel Marketing (RTM) professionals in order to review questionnaires, gather input, collect marketing materials and other information about tourism in the South Padre Island area.

2. Reconnaissance Trips:

Judy L. Randall, Berkeley Young and Luke Hodges visited South Padre Island, Port Isabel, and the Lower Laguna Madre area in January 2000 and fully evaluated the site from the perspective of the tourist. Additional reconnaissance was conducted during February and April 2001 while in the area to conduct tourist intercept interviews. The reconnaissance team findings are documented in this report.

3. Visitor Profile & Conversion Survey – Random Sample of Inquiries:

1,000 4-page questionnaires were mailed out to a random sample of people who had requested visitor information from the South Padre Island CVB over the course of a one-year period. 230 surveys were returned for a 23.0% response rate and have been tabulated as part of this report. It should be noted that the typical response rate for this kind of study is between 10% and 20%. Thus, this response rate is better than average when compared to similar tourism surveys. Additionally, our team noted a homogenous nature to the responses. Telephone interviews were conducted with a random sample of those who had made inquiries about visiting South Padre Island. The qualitative data collected from these interviews confirmed and reinforced the findings from the mail survey.

4. Executive Interviews

A listing of community leaders was prepared with input from the South Padre Island CVB officials. Over 20 interviews were conducted in person or by telephone with these targeted opinion leaders. Anonymity was guaranteed for each interview. The summary of the responses is a part of this study.

Study Objectives & Methodology

5. Tourist Quarterly Intercept Interviews

Intercept interviews were conducted with travelers in South Padre Island, Port Isabel, and the Eastern Rio Grande Valley area during the months of January, February, April, July and October 2001. This included intercept interviews conducted at local lodging, attractions, parks and other locations. Findings from these interviews are included in both the reconnaissance and in the intercept interview segments. The purpose of these interviews was to document differences in travel patterns and tourist behavior in each of the four seasons of the year.

6. Lodging Property Interviews and Fax Survey:

Additionally, every lodging property in South Padre Island was contacted. General Managers of a random sample of properties were interviewed. Additionally a fax survey was sent to every lodging property (hotels, motels and rental units). This information has been tabulated and is part of this report.

7. State, Regional and National Data:

Research data from the State of Texas was obtained and analyzed as part of the study. Additionally, regional and national travel databases were studied.

8. Marketing Materials Evaluation:

Marketing materials including brochures, fulfillment pieces, press kits and coverage, print advertising and placement schedules, etc., were obtained from the South Padre Island CVB. Those materials were evaluated based on research findings and the marketing experience of the RTM team. Our analysis and recommendations are a part of this report.

9. Convention/Meeting Planner Interviews

Telephone interviews were conducted with meeting and convention planners throughout Texas and the central United States. Planners that had held meetings or conventions in South Padre Island were conducted to determine their level of satisfaction and desire to return. Additionally meeting planners that had never held an event in South Padre and were considered potential targets were contacted to determine their awareness of the Island as a meeting destination and their overall desire to plan an event at South Padre. The results of these surveys were compared to the 1999 Market Study for a new 300 room full service hotel on the Island.

10. Report and Recommendations:

Based on research findings a comprehensive report was written and presented to South Padre Island CVB.

COMPANY BACKGROUND FOR RANDALL TRAVEL MARKETING

Randall Travel Marketing, Inc. focuses solely on market research, strategic planning, consulting, marketing planning, product development, education, and trend analysis for the travel and tourism industry.

VISION AND MISSION STATEMENT

Provide a network of powerful travel and tourism marketing professionals.

RESEARCH-BASED MARKETING

Walt Disney said it best. "You don't build it for yourself. You find out what the people want and you build it for them." This is the essence of research-based marketing. Scientific, reliable research is logical, and guarantees results. No more gambling. No more guesswork. No more wasted marketing money. It just simply works.

COMPANY CAPABILITIES AND EXPERTISE

- Comprehensive Travel & Tourism Research
- Travel & Tourism Strategic Planning
- Feasibility Studies
- Economic Impact Studies
- Product Development Consulting
- Promotion and Marketing Return On Investment Studies
- Educational Workshops
- Keynote speaking

SERVICES OFFERED BY RANDALL TRAVEL MARKETING

Randall Travel Marketing offers a wide range of services and resources for all segments of the travel and tourism industry including destination marketing organizations (DMOs), attractions, lodging, food service, group tour, conventions, transportation services, festivals/events, parks and recreation.

Comprehensive Research and Strategic Plan

RTM provides comprehensive research-based strategic plan studies to determine positioning, and marketing strategies. Prices are determined based on scope of individual project and includes:

- Reconnaissance and mystery shopping reports
- Audit of current status, history and market share analysis
- Visitor profile and conversion research (and comparability to state and national research)
- Creative evaluation of marketing materials, advertising, and placement
- Recommended marketing position and strategies based on research findings

Research

RTM conducts a wide range of research for travel and tourism clients. Prices are determined based on scope of individual project. Typical projects include:

- Visitor Profile Studies
- Conversion Studies
- Economic Impact Studies
- 50-State Guide Effectiveness Studies: *An annual comparative analysis study conducted by RTM to measure the effectiveness of State Travel Guides and Websites.*
- Focus Groups and Focus Forums

Consulting

RTM provides consulting services based on individual client needs. Prices are based on \$1,500 per professional day plus expenses:

- Site evaluations and feasibility studies
- Board of Directors retreats, training and vision sessions
- Tourism product development consulting
- Marketing planning sessions

RTMPro

An on-line professional network exclusively for the travel and tourism industry. Membership Cost is \$175 annually. Visit www.RTMpro.com to learn more.

Seminars and Educational Workshops

Please contact RTM to obtain a complete list of educational publications available. Also see list on our web site www.RTMnet.com.

Judy L. Randall, President and CEO

Over 20 years of travel & tourism and marketing experience. Randall has worked with numerous attractions, hotels and Inns, festivals, events, and destination marketing organizations throughout the world.

Current and Recent Clients

- Smoky Mountain CVB (TN)
- State of Mississippi: Millennium Blues Alley Heritage Trail (MS)
- Cape Fear Coast CVB (NC)
- Bryan-College Station CVB (TX)
- Tennessee Aquarium (Chattanooga, TN)
- Fredericksburg Area Tourism (VA)
- Lexington CVB (KY)
- Memphis CVB (TN)
- Society of Government Meeting Planners
- Newport News Tourism Development Office (VA)
- Select Registry/Independent Innkeepers Association (366 Inns in North America)
- Shreveport-Bossier CVB (LA)
- Greenville-Washington County CVB (MS)
- Alabama Mountain Lakes Tourist Association (16 Counties in North Alabama)
- Columbus CVB and Port Columbus Civil War Naval Museum (GA)
- Louisiana Office of Tourism (Baton Rouge, LA)
- Macon CVB and NewTown Macon Coalition (GA)
- Clayton County CVB and International Park (Jonesboro, GA)

Recent keynote and speaking engagements

- Association of Zoos and Aquariums (April, 2001)
- Bank Travel Association (February, 2001)
- American Bus Association (January, 2001)
- National Heritage Conference (January, 2001)
- Walt Disney World International PR Summit (November, 2000)
- Society of American Travel Writers Annual Meeting (June, 2000)
- Society of Government Meeting Planners (May, 2000)
- International Association of Convention & Visitor Bureaus (January, 2000; March 2001)
- Select Registry/International Innkeepers Association (Victoria, B.C. November, 1999 & Myrtle Beach, SC March, 2000; Boston, MA, February, 2001)
- Southeast Tourism Society Travel College & Annual Meeting (7 years)
- National Conference For Outdoor Drama (October, 1997)
- **Numerous state tourism conferences throughout the United States

Randall, along with Dr. Larry Gustke, authors the annual *Top Ten Trends In Travel and Tourism*, which is used internationally by travel and tourism marketing organizations. Her writings and reports on travel and tourism marketing and promotion are well known throughout the industry.

Larry D. Gustke, Ph.D.

Over 20 years experience in conducting research on outdoor recreation, tourist behavior and tourism marketing. Gustke has conducted research in Alabama, California, Florida, Georgia, Kentucky, Louisiana, Michigan, Mississippi, New Hampshire, North Carolina, Tennessee, Texas, and Virginia.

Dr. Gustke is a tenured professor with NC State University (10 years). Dr. Gustke works with Randall Travel Marketing, Inc. as research mentor and supervisor and participates in all client projects.

Current and Recent Clients

- Bryan-College Station CVB (Texas)
- Institute of Outdoor Drama (Raleigh, NC)
- Cape Fear Host (Wilmington, NC)
- NewTown Macon Coalition For Downtown and Tourism Marketing (Macon, GA)
- Shreveport-Bossier CVB (Shreveport, LA)
- Greenville-Washington County CVB (Greenville, MS)
- Onslow County Tourism, (Jacksonville, NC)
- Gainesville-Hall County CVB (Gainesville, GA)
- Alpine Helen-White County (Helen, GA)
- State of North Carolina - Travel and Tourism Division (Raleigh, NC)
- Durham Convention and Visitors Bureau (Durham, NC)
- Greater Raleigh CVB Raleigh (Raleigh, NC)

Office of Park and Tourism Research (OPTR) – NC State University

Faculty and Research Associate (ten years)
Department of Parks, Recreation and Tourism Management
North Carolina State University
Raleigh, North Carolina

- Design and conduct:
 1. Tourism Marketing Research
 2. Tourism Product Assessment
 3. Tourism Planning and Development
 4. Tourism Economic Development Strategies
- Teach undergraduate and graduate classes in tourism management and planning.

Professional Associations

- Travel and Tourism Research Association, International

Travel and Tourism Publications

Gustke, along with Judy L. Randall, authors the annual *Top Ten Trends In Travel and Tourism*, which is used internationally by tourism marketing organizations

Berkeley W. Young, Director of Client Services

15 years of travel/tourism marketing and management experience. Young's experience includes serving as the Executive Director of a rural tourism development authority and chamber of commerce in which he oversaw the creation and success of a start up research-based tourism marketing program. Then, Young was hired as Director of Sales and quickly promoted to General Manager of a large golf resort managed by the nations largest hotel management company. Young joined Randall Travel Marketing in 1998 as Director of Client Services. In this role, he manages each client project.

Current and Recent Clients

- Annual Report: 50 State Visitor Guide Comparison Study
- Cape Fear Coast CVB (NC)
- Smoky Mountain CVB (TN)
- Memphis CVB (TN)
- Bryan-College Station CVB (TX)
- Shreveport-Bossier CVB (LA)
- Greenville-Washington County CVB (MS)
- Louisiana Office of Tourism (Baton Rouge, LA)
- Macon CVB and NewTown Macon Coalition (GA)
- Clayton County CVB (Jonesboro, GA)
- Columbus CVB and Port Columbus Civil War Naval Museum (GA)
- Clayton County International Park (Jonesboro, GA)
- Alabama Mountain Lakes Tourist Association (Mooresville, AL)
- Onslow County Tourism (Jacksonville, NC)

Recent Speaking Engagements

- International Association of Convention and Visitors Bureaus (March, 2001)
- North Georgia Chautauqua (March, 2001)
- Mississippi Governor's Conference on Travel and Tourism (February, 2001)
- Select Registry Innkeepers Association (366 Inns in North America) (February, 2001)
- NC Association of Convention & Visitor Bureaus (October, 2000)
- Tennessee Tourism Roundtable (September, 2000)
- Southeast Tourism Society Annual Marketing College (2 years)
- Tri-States CVB Association (February, 2000)

Travel & Tourism Publications

As an associate of Randall Travel Marketing, Inc., Young researches and writes a variety of white papers and marketing guides for the tourism industry. Recent articles include:

- *Packaging Golf For Community-Wide Economic Impact*
- *How To Conduct A Conversion Study*
- *Front Line Hospitality Training That Delivers Results*
- *Inquiry To Fulfillment To Database – Managing Your Marketing Processes*

Luke Hodges, Director of Research and Planning

10 years of travel/tourism and marketing experiences. As Director of Research and Planning, Hodges is responsible for planning, supervising and executing tourism research projects for Randall Travel Marketing.

Hodges worked for the National Tour Association as Manager of the National Tourism Foundation and has also served as the Associate Director and Director of Marketing for the Lexington Children's Museum. Additionally Hodges owned a small restaurant in Virginia. His non-tourism experience includes serving as Program and Research Manager for a large manufacturing company.

Hodges has an MBA from Georgetown University with an emphasis in Marketing as well as an MA in International Commerce from the Patterson School of Diplomacy and International Commerce at the University of Kentucky.

Current and Recent Clients

- Annual Report: 50 State Visitor Guide Comparison Study
- Georgia Travel Guide Research & Evaluation Study
- Wilmington-Cape Fear Coast CVB (NC)
- Memphis CVB (TN)
- Bryan-College Station CVB (TX)
- South Padre Island CVB (TX)
- Lexington CVB (KY)
- Norman CVB (OK)
- State of Mississippi: Millennium Delta Blues Alley Project

DESCRIPTION OF FIRM'S EXPERIENCE

Our professional team has (individually and collectively) performed numerous studies and marketing planning projects in travel and tourism. With over 50 years of combined experience in strategic tourism research and consulting, we bring significant credentials to our work. This list below reflects our expertise in providing comprehensive tourism research, strategic planning and marketing studies on the state, regional, county and city level, as well as with attractions and lodging.

County, City, Chamber Tourism Studies:

- **2001 – Norman CVB (TX):** Reconnaissance, visitor profile and conversion study, strategic planning. Contact: Marcy Jarrett, 800-767-7260.
- **2001 – Lexington CVB (NC):** Reconnaissance, visitor profile and conversion study, strategic planning. Contact: Greta Lint, 336-236-4218
- **2001 – Bryan-College Station CVB (TX):** Comprehensive tourism research and strategic planning. Contact: Cal McNeil, 956-761-6433.
- **2001 – Cape Fear Coast CVB (NC):** Comprehensive tourism research and strategic planning. Contact: Judith Grizzel, 910-341-4030.
- **2001 – Smoky Mountain CVB (TN):** Reconnaissance, visitor profile and conversion study, strategic planning. Contact: Herb Handly, 865-448-6134.
- **2001 – Anderson County Tourism Council (TN):** Visitor profile and conversion study. Contact: Connie Elliott, 865-457-4542.
- **2000 – Fredericksburg Area Tourism (VA):** Comprehensive visitor profile and conversion study and strategic plan. Reference: Bonnie Smith, 540-891-8687.
- **2000 – Lexington Convention and Visitors Bureau (KY):** Market segmentation study, visitor profile and conversion study, intercept interviews, exit interviews, and strategic planning. Reference: Barry Biggar, 606-233-1221.
- **2000 – Oak Ridge CVB (TN):** Comprehensive visitor profile and conversion study and strategic plan. Reference: Joe Valentino, 865-482-7821.
- **2000 – Salisbury Convention and Visitors Bureau (NC):** Comprehensive reconnaissance, visitor profile and conversion study, and strategic plan development. Reference: Judith Newman, 800-332-2343.
- **2000 – Lexington/Rockbridge County CVB (VA):** Comprehensive study including visitor profile and conversion study and strategic plan. Reference: Jean Clark, 540-463-3777.
- **2000 - Newport News Tourism Development Office (VA):** Comprehensive visitor profile and conversion study and strategic plan. Reference: Bettie Matthews, 757-926-3725.
- **2000 – Memphis Convention and Visitors Bureau (TN):** Full reconnaissance, site evaluation and report followed by a profile and conversion study. Reference: Regena Bearden, 901-543-5300.
- **2000 - Clarksville-Montgomery County CVB (TN):** Comprehensive research study including reconnaissance, visitor profile, and strategic plan. Reference: Michelle Dickerson, 931-647-2331.
- **2000 – Shreveport –Bossier Convention and Tourist Bureau (LA):** Comprehensive visitor profile and conversion study. Focus Forum study with area residents to determine tourism perceptions. Reference: Stacy Brown, 318-222-9391.
- **1999- Greenville-Washington County CVB (MS):** Comprehensive conversion and visitor profile study. Reference: Bill Seratt, 662-334-2711.

Project Team

- **1999 – Cartersville – Bartow County CVB (GA):** Comprehensive market analysis and tourism conversion study. Reference: Ellen Archer, 770-387-1357
- **1999 – Statesboro Convention and Visitors Bureau (GA):** Comprehensive market analysis and tourism conversion study. Reference: Mandy Fortune, 912-489-1869
- **1999 – Decatur CVB (AL):** Market analysis and tourism conversion study. Reference: Pam Swanner, 256-350-2028
- **1999 – Columbus CVB (GA):** Comprehensive market analysis & tourism conversion study. Reference: Brenda Price, 800-999-1613.
- **1999 – Onslow County Tourism (Jacksonville, NC):** Year-long intercept program, comprehensive visitor conversion study, and specific military market study. Contact Janice Roamer, 910-455-1113.
- **1999 – Goldsboro-Wayne County Chamber of Commerce (NC):** Comprehensive visitor conversion and profile study. Board training and on-going consulting. Reference: John Peacock, 919-734-2241.
- **1998 – Macon CVB and NewTown Macon Coalition For Downtown and Tourism Marketing (GA):** Comprehensive market research and strategic planning for downtown Macon and Bibb County tourism marketing efforts: Reference: Janice Marshall, Macon CVB, 912-743-3401.
- **1998 – Toccoa-Stephens County Chamber of Commerce (GA):** Initial tourism market study, product evaluation & development, target visitor identification, marketing strategies. Reference: Cynthia Brown, 706-886-2132.
- **1998 – Clayton County Convention and Visitors Bureau (Jonesboro, GA):** Market evaluation, visitor profile, and strategic marketing plan development. Reference: Stacey Dickson, 770-478-4800, extension 4.
- **1997 - Cleveland Chamber of Commerce (TN):** Comprehensive visitor study, tourist expenditures, market development and marketing strategies. Reference: Melissa Alley, 423-472-6587.
- **1997 – Gainesville/Hall County Chamber of Commerce (GA):** Feasibility Study to determine need for regional visitor center including location, product mix, and recommended funding. Reference: Kit Dunlap, 770-532-6206
- **1997 – Helen CVB/White County (GA):** Comprehensive tourism product assessment, visitor profile, product positioning, product development, and marketing strategies. Reference: Helen Fincher, Helen CVB, 706-878-2747.
- **1997 – Augusta-Richmond County CVB (GA):** Comprehensive visitor and conversion study, product assessment and marketing strategies. Reference: Barry White, 706-823-6600.
- **1996 – Hickory CVB (NC):** Comprehensive visitor profile, product assessment, interface with furniture industry, product development, recommended target markets and market segments, and marketing strategies. Reference: Lynn Lail, Chairperson, Tourism Research Study Committee, 704-324-4546.
- **1995 – Anniston Chamber of Commerce (AL):** Product assessment, product development, and marketing recommendations. Reference: Cindy Bailey, Anniston Chamber of Commerce (now at Dahlonega/Lumpkin County Chamber of Commerce, 706-864-3711).
- **1995 – Americus/Sumter County Chamber of Commerce (GA):** Comprehensive visitor and conversion study, product assessment, marketing recommendations.
- **1993 – Richmond County Chamber Study (Rockingham, NC):** Visitor profile study and marketing recommendations.

- **1992 – Edenton/Chowan County Chamber of Commerce (NC):** Visitor profile, economic development assessment, and marketing recommendations. Contact: Richard Bunch, Edenton/Chowan County Chamber of Commerce, 919-482-3400.
- **1992 – Brevard/Transylvania Tourism Development Authority (NC):** Comprehensive visitor profile study, product assessment, conversion study, economic impact, and marketing recommendations.
- **1991 – Boone CVB (NC):** Visitor profile study, product development, and marketing recommendations.

Statewide and Regional Tourism Studies:

- **2001 – Georgia Department Of Industry, Trade and Tourism:** Target market research and evaluation of state travel guide. Reference: Kevin Langston, 4024-656-4504.
- **2001 – Mississippi Millennium Blues Alley Trail - Mississippi Division of Tourism Development:** Comprehensive research and feasibility study for developing the Millennium Blues Alley Trail project. Reference: Darienne Wilson, George Milam, 601-359-3297.
- **2001 – Mississippi Division of Tourism Development:** Hospitality Training and “Train-the-trainer” programs. Reference: Darienne Wilson, George Milam, 601-359-3297.
- **2000 – NC Tourism, Film and Sports Development:** Training seminars and electronic marketing applications. Reference: Lynn Minges, 919-733-4171.
- **2000 – Kentucky Department of Travel:** Target market research and evaluation of state travel guide. Reference: Bob Stewart, 502-564-4930.
- **1999 – Louisiana Office of Tourism Statewide Visitors Guide Evaluation:** Evaluation of visitor’s guide for Louisiana and competitor states. Recommendations for user-friendliness and marketing. Reference: Mark Northington, Louisiana Office of Tourism, 504-342-8144.
- **1999 – Alabama Mountain Lakes Region:** Regional visitor profile and positioning study for the sixteen county-region of North Alabama. Reference: Georgia Turner, 256-350-3500.
- **1995 – North Carolina Travel Council Membership Research Inventory and Index:** (Gustke) Statewide inventory of travel and tourism research.
- **1994 North Carolina Visitor Study:** Market profile and expenditures of NC visitors (Gustke). Reference: NC Division of Travel and Tourism, 919-733-4171.
- **1994 North Carolina Historic Sites:** Summer/Fall visitor study completed for NC Historic Sites (Gustke). Reference: Jim McPherson, NC Historic Sites, 919-733-4763.
- **1994 North Carolina International Travel Task Force:** Data and statistics provided to gubernatorial task force (Gustke). Reference: NC Division of Travel and Tourism, 919-733-4171.
- **1993 North Carolina Inquiry Conversion Study:** Visitor conversion for NC Travel and Tourism Division (Gustke). Reference: NC Division of Travel and Tourism, 919-733-4171.
- **1993 – 98 Five-Year Marketing Plan for North Carolina Division of Travel and Tourism:** Developed comprehensive five-year plan (Gustke). Reference: NC Division of Travel and Tourism, 919-733-4171.
- **1993 North Carolina Aquariums Visitors Study:** Visitor profile and travel behavior study conducted for NC Aquariums (Gustke). Reference: W. Neal Conoley, Jr., Executive Director, NC Aquariums, 919-733-2290.
- **1992 Survey of North Carolina Legislators:** Comprehensive survey of state legislators’ opinions and expectations about the statewide travel industry. Reference: Ralph Peters, Travel Council of North Carolina (retired), 704-542-3738.

Hotels, Inns and Lodging Properties:

- **2001 – Select Registry/Independent Innkeepers Association (US, Canada, Mexico).** On-going market research and consulting for this professional association of the 366 best Inns in North America. Contact: Sue Moore, 800-344-5244.
- **2000 – SWAG Inn, (Waynesville, NC):** Market evaluation and strategic planning for this exclusive Inn in the NC Mountains. Contact: Diane Matthews, 828-926-0430.
- **2000 – Greystone Inn (Lake Toxaway, NC):** Consulting and marketing planning. Contact: Tim Lovelace, 828-966-4700.
- **1999 – Inn at Occidental (Sonoma County, CA).** Consulting and marketing for this premier Inn in the Wine Country. Contact: Jean and Bill Bullard, 707-874-1047.
- **1999 – Esmeralda Inn (Chimney Rock, NC):** On-going research and consulting for this historic inn, originally built in 1890. Contact: JoAnn Okpych, 828-625-9105.
- **1999 – Oak Bluffs Inn (Martha's Vineyard, MA):** Site evaluation, analysis of current and potential client base, marketing planning. Contact: Lisbeth Cooper, 828-625-1589.
- **1999 – Parkwood Motel and RV Center (Statesboro, GA):** Site evaluation, customer base analysis, marketing recommendations. Contact: Harry Wachinak, 912-681-3105.

Attractions and Festivals:

- **2001 – Tennessee Aquarium (Chattanooga, TN):** Research consulting and product development planning. Contact: Cindy Todd, 423-785-3004.
- **2000 – Walt Disney World (Orlando, FL):** Seminar for International PR Summit. Contact: Mike Hyland, 407-566-5311.
- **2000 – Natural Bridge (VA):** Site evaluation, visitor profile and conversion study and strategic plan. Reference: Dave Parker, 540-291-2121.
- **1999 - Port Columbus Civil War Naval Center (GA):** Comprehensive positioning, and initial marketing planning for this new historic site and experiential museum. Reference: Bruce Smith, 706-324-7334.
- **1999 – Douglass Theater (Macon, GA):** Comprehensive positioning, product development, and marketing study. Reference: Pamela Richardson, 912-743-6179.
- **1999 – NC Summer Performing Arts Consortium (Raleigh, NC):** Consulting for product development, positioning and marketing. Reference: Karen Wells, NC Arts Council, 919-733-2111.
- **1999 – Feasibility Study: Military Museum Attraction (Columbus, GA):** Research, focus forums, site evaluation, and feasibility study for major new museum attraction for Columbus, GA. Reference: Mat Swift, W.C. Bradley Company, 706-571-6059.
- **1998 – Clayton County International Park ('96 Olympic Site) (Jonesboro, GA):** Product assessment and market evaluation for most appropriate marketing strategies for this \$17 Million Dollar '96 Olympic Volleyball Site. Reference: Charlie Obranowicz, 770-603-4014.
- **1994 - Big South Fork Scenic Railway (Stearns, KY):** Product assessment, visitor study, conversion study, advertising and public relations assessment, and marketing recommendations. Reference: Bill Singleton, 606-376-5330.
- **1998 and 1992 - An Appalachian Summer Festival (Boone, NC):** Product assessment, and marketing recommendations. Reference: An Appalachian Summer, Denise Weissburg, 704-262-2510.

Background

Located on the Gulf Coast of Texas, South Padre Island is just 25 miles from Mexico and its 34 miles of beaches among the Gulf waters have been rated the third best beach in the United States by The Travel Channel. The history of the region covers Native American Indians from pre-Colonial America through the eighteenth, nineteenth and twentieth centuries. While the beginnings of the South Padre Island Convention and Visitors Bureau (SPICVB) are unclear, the current operating structure was established in 1998.

Mission and Guiding Principles

The South Padre Island Convention and Visitors Bureau is part of the government of the Town of South Padre Island. A Mayor and Board of Aldermen, consisting of five people, govern the Town. Each Alderman appoints one citizen to serve on the SPICVB Advisory Board and the Chairman of the South Padre Island Chamber of Commerce also serves on the Advisory Board. The Executive Director of the CVB reports directly to the Mayor and Board of Aldermen.

The South Padre Island CVB is the area's liaison between potential visitors to the area, and the businesses that will host them when they come. It acts as an information clearing house, convention management consultant and promotional agency for the Island.

South Padre Island CVB Staff

Dan Quandt	Executive Director
Ginny Hiatt	Convention Centre Director
Mary K. Pollard	Events Coordinator
Sylvia Mata	Visitors Center Manager
Connie Ledbetter	Sales Director
Sylvia Soliz	Sales Manager
Ben Guerrero	Sales Manager
Marty Vitt	Executive Assistant
Vacant	CVB Financial Assistant
Dixie Rowell	Convention Centre Secretary/Receptionist
Rudy Falcon	Maintenance Foreman
Robert Garza	Information Specialist/Mail Clerk
Lili DeRousie	Tourism Coordinator
Erica Pena	Communications Director
Laura Prado	Sales Secretary/Housing Coordinator
Celia Garza	Services Coordinator
Frank Aguilera	Convention Centre Maintenance
Miguel DeLara	Convention Centre Maintenance
Urbano Gonzales	Convention Centre Maintenance
Raymond Rios	Convention Centre Maintenance
Juan Sanchez	Convention Centre Maintenance
Reyes Troncoso	Convention Centre Maintenance

2000 - 2001 Convention and Visitors Bureau Advisory Board

<u>Name / Term</u>	<u>Appointed By</u>	<u>Business Affiliation</u>
Tim Goodman '02	Cyganiewicz	Sheraton Fiesta
Bill Donohue '01	Eymard	Radisson Resort
Bob Pinkerton Jr. '01	Wells	Island Services
Debbie Moutsos '01	Dwyer	Padre South Resort
Mike Lemmons '02	Houston	Amberjacks's Bayside Bar and Grill
Perry "Bud" Inhofe '02	Thornton	Retired
Tom Hanson	Chamber Chair	Scampi's Restaurant

Funding

A 13% room occupancy tax is collected on all overnight lodging on South Padre Island. Six percent of the tax goes to the state of Texas isn't sales tax, and the remaining 7% goes to the Convention and Visitors Bureau, with 4% going to the sales and marketing functions and 3% going to the Convention Centre. The Convention Centre operates as a division or department of the SPICVB. Other SPICVB funding sources include building rental, commissions, co-op dollars, and sales of minor items, etc. The chart below shows the room occupancy tax revenues since fiscal year 1997/88.

South Padre Island Occupancy Tax Five-Year Collection History

Year	7% Tax Revenue	% Change
97/98	\$1,876,362	--%
98/99	\$1,986,228	5.86%
99/00	\$2,134,607	7.47%
00/01	\$2,299,510	7.73%

The previous table shows the *actual* percentage of occupancy tax growth for South Padre Island. The average annual growth for the period is 7.02%. It is important for South Padre Island to look at multiple-year trends in occupancy tax growth and compare these to state, regional and national statistics. Multiple year trends are critical since coastal storms can have dramatic effects on occupancy tax collections within the peak tourist season of any given year.

Revenues Compared to State and National Industry Growth

The average annual growth rate for total tourism revenues nationwide is 4.9%. The Texas Department of Tourism reports \$36.7 billion in tourism revenue earned in 1999 and an average growth rate of 7.6% statewide. The Department of Tourism also reported total traveler spending by visitors to Cameron County in 1999 was \$425.6 million, ranking it 9th among Texas' counties. This represents a 5.0% increase over 1998. Since 1994, the Texas Department of Tourism has reported an average annual growth rate of 6.1% statewide and 4.53% for South Padre Island.

South Padre Island Lodging Survey

RTM conducted a survey of the South Padre Island area lodging properties in the months of April – June 2001. The purpose of this research segment was to determine the percentage of total occupancy driven by five basic market segments. A total of 21 lodging properties/rental agencies representing 1,904 of the 3,960 lodging units on South Padre Island responded to the survey (48.08% response rate).

The following tables outline the findings:

South Padre Island Lodging Market Mix

Category	Hotel / Motel	Condo / Villa	Weighted Total**
# of lodging properties & rental agencies / # of rooms, units	28 / 2207	67 / 1753*	95 / 3960
Response Rate	12 / 1091	8 / 813	20 / 1904
RESPONSE Percentage	49.43%	46.38%	48.08%
Corporate	11%	1%	6%
Convention/Meeting	21%	3%	9%
Group Tour	3%	5%	5%
Visiting friends and relatives (weddings, funerals, reunions etc.)	6%	9%	12%
Leisure (visiting regional attractions and activities for pleasure)	53%	63%	66%
Other	6%	12%	2%

*Total Number of Rental Condos in 2000 provided by SPICVB.

Notes:

- The large number of rental properties in coastal areas causes constant change in the number of rooms/units that are available. Rental unit inventories vary from month to month.
- Responses to the fax survey were sorted by lodging type and the responses within each group were very consistent. Surveys were received from the four large full service hotels in addition to a random sample of the smaller limited service motels. Additionally, surveys were received from large and small rental condominium management companies. The surveys received came from properties on the Bay, Gulf and Inner corridor of the island in addition to the north, central and southern end of the island.
- **The weighted total above was calculated by applying market mix percentages to the room counts of those properties that did not respond to the survey. Percentages were determined by using the statistics reported by lodging properties that were similar in size, amenities, location and/or rate to those properties that did not participate in the survey.

South Padre Island 2000 Lodging Occupancy By Month

Month	Hotel / Motel	Condo / Villa
# of lodging properties / # of rooms, units	28 / 2207	67/1753
Response Rate	1091 / 2207	813/1753
RESPONSE PERCENTAGE	49.43%	46.38%
January	46%	76%
February	67%	77%
March	74%	57%
April	68%	54%
May	60%	44%
June	76%	55%
July	88%	78%
August	58%	53%
September	54%	34%
October	46%	18%
November	37%	17%
December	30%	22%

NOTE: Occupancy percentages are based on statistics reported from 21 of the 95 lodging properties/rental agencies on South Padre Island. These 21 properties represent 1,904 of the 3,960 total lodging rooms (hotel/motel/rental units) on the island.

SPICVB Funding & Budget Analysis

The South Padre Island CVB is funded through the receipt of 100% of the total room occupancy tax collected on South Padre Island. The SPICVB also generates funding through building rental, commissions, co-op dollars and sales of minor items, etc. In FY2000/01, the CVB is budgeted to collect \$2,299,510 in occupancy tax revenues from the funding entities. The budgeted expenses for the SPICVB are \$2,458,740. The shortfall of \$159,230 is made up in revenues generated by the SPICVB through co-op advertising (\$125,000), label/brochure sales (\$7,000), rental income (\$7,000), penalties (\$3,500), interest revenue (\$15,000), miscellaneous revenue (\$2,500) and website advertising (\$15,000). These additional revenues total \$175,000 leaving the SPICVB with positive line budgeted at \$15,770.

Percentage of 2000/01CVB Budget

Budget Category	Visitors Center	% of whole	Sales & Marketing	% of whole	Event Marketing	% of whole	Total Budget	% of whole
Salaries & Benefits	\$95,502	3.9%	\$466,086	19.0%	\$24,277	1.0%	\$585,865	23.9%
Office Expenses	\$49,975	2.0%	\$71,350	2.9%	\$1,000	0.1%	\$122,325	4.9%
Outreach	\$326,450	13.3%	\$1,065,250	43.3%	\$358,850	14.6%	1,750,550	71.2%
TOTAL BUDGET	\$471,927	19.2%	\$1,602,686	65.2%	\$384,127	15.7%	2,458,740	100%

SPICVB Funding & Budget Analysis

A review of the three basic budget categories for South Padre Island (Salaries & Benefits, Office Expenses & Outreach) reveals that the CVB is spending the money it receives appropriately as a percentage of the whole. These figures directly compare with the standards set by the International Association of Convention and Visitors Bureaus (IACVB).

Comparing the size of the CVB budget categories as a percentage of the total room occupancy tax collections in the market area is the best method to determine the highest and best use of the hotel/motel tax dollar. A recent survey of the IACVB membership revealed that 80% of their member CVB's budget comes from the room occupancy tax collections. In recent years, the SPICVB has been receiving 100% of the total room occupancy tax designated for tourism promotion each year. RTM commends the city for making this commitment.

The current level of staffing expense is low as a percentage of total room occupancy tax (which is representative of the size of the lodging market that the CVB is promoting). IACVB recommends that staffing expense be 25% - 40% of total hotel/motel tax collections and the CVB is currently operating in the 24% range.

Summary

Overall, we can issue a satisfactory report on the current and past status for the South Padre Island Convention and Visitors Bureau. We've reviewed all pertinent materials and found nothing that seemed inappropriate. The SPICVB operates according to standards established in the tourism industry, and meets most criteria established by the International Association of Convention and Visitor Bureaus (IACVB).

The SPICVB is to be commended for having a small advisory board with an efficient decision-making structure. We have seen CVB's and DMO's with boards of up to 48 members, which creates a slow ineffective structure. The SPICVB will benefit from a long-range plan that will set a goal of steady incremental growth based on solid objectives and aligning the marketing expenditures to the actual lodging market mix.

The research team has determined that South Padre Island has definite strengths as a tourist destination. It is up to South Padre Island to determine if the predictable expected growth (approximately 7% annually) is acceptable, or if the area seriously wants to increase its tourism market share. If so, it will need to be willing to invest the revenues, time and resources necessary to ensure that growth. *Thus, we anticipate the need for growth strategies that continue to penetrate current markets, strategies to target new visitor markets and increase repeat visitation.*

The strategies for continued development of the SPICVB are contained under the "Recommended Strategies" section of this report.

Economic Impact and Tax Relief

An analysis of the 1999 economic impact of travel and tourism in Cameron County shows the financial impact that visitors leave in the community. The figures below show the amount of tax revenue that is generated by visitors to the area, thus relieving residents of some of the tax burden of maintaining the local infrastructure. The figures below are based on fiscal year 1999, the most recent figures that are available.

The 1999 economic impact of travel and tourism in Cameron County is as follows:

\$436,290,000	Total tourism expenditures (FY1999) in Cameron County by visitors (Figures provided by TDED)
\$75,850,000	Total Tourism Payroll in Cameron County (FY1999) (Figures provided by TDED)
7,560	Tourism Payroll (jobs) for Cameron County (FY1999) (Figures provided by TDED)
\$26,805,171	Gross Lodging Receipts (FY1999) in Cameron County (Figures from State of Texas & South Padre Island)
\$1,876,362	Total Room Occupancy Tax revenues generated (FY1999) in Cameron County (Figures from State of Texas & SPICVB)
\$1,411,363	Budget for the South Padre Island CVB (FY1999/00) (Figures provided by South Padre Island CVB)
\$29,550,000**	State Sales Tax receipts paid (FY1999) by overnight tourists in Cameron County to the state of Texas. (Figures provided by TDED)
\$9,420,000**	Local Sales Tax receipts paid (FY1999) by overnight visitors to Cameron County. (Figures provided by TDED)
\$38,970,000	Total sales tax paid by overnight tourists to the state and Cameron County. (Figures provided by TDED) **Total of two figures above.
335,227	2000 Population of Cameron County (Source: US Census Bureau)
73,550	Households in Cameron County (single & multi-family) (Source: US Census Bureau, 1990 Census)
3.47	Average number of residents per household (Source: US Census Bureau, 1990 Census)
\$529.84	Tax Relief per household in Cameron County due to tourism

Marketing Materials Analysis

Marketing Materials Evaluation Summary

Overall, the marketing materials for the South Padre CVB are either on par or better than the materials we see in other destination marketing organizations (DMOs).

The visitors guide and other materials produced by South Padre Island CVB are on par with other DMOs and provide information such as listings of attractions, special interest elements, outdoor recreation options, calendar of events, a listing of lodging properties and maps.

Based on the response to our research, the conversion rate of the South Padre Island CVB materials is just under 35%. This is a very good conversion rate given the amount of inquiries fulfilled by the CVB. RTM has seen conversion rates lower than 15%, which is unacceptable. The acceptable range for a conversion rate is 20% to 40%. Once the conversion rate exceeds 40% the CVB needs to expand its marketing efforts to increase the number of inquiries generated.

However, one must remember that as an industry we have trained the tourist to expect a certain style and level of effective materials. This does not mean that they are the best that they can be. When compared to other materials that do offer great user-friendliness, the same tourist who rates materials for a particular destination highly, will choose another destination because their materials are more effective. Thus, RTM recommends the materials for South Padre Island CVB be enhanced for even greater effectiveness. Think of this as adding a little more "sizzle" to a good quality steak.

For overall enhancement we recommend future designs and formatting that focus on the following:

- Establishing a visitor "hook" on the front of each piece. This is the positioning statement and includes wording and design presented in such a way as to compel potential visitors to want to come to the area.
- Designing each piece in terms of "user-friendliness" for the customer.
- Adding a clear focus on itineraries and trip planning that makes choosing South Padre Island an easier decision for potential visitors.
- Adding sidebars and other emotional connection items that will help to capture the experience one has in visiting this community.

The specific pieces we reviewed include:

- Rack Brochure
- Visitors Guide
- Convention/Group Tour/Meeting Planners Guide
- CD Rom
- Website www.sopadre.com

Marketing Materials Analysis

1. **South Padre Island, Texas (Rack Brochure):**

The headline and graphics used on the front include the wording: "South Padre Island, Texas – 'Where Texans kick their boots off.'" The cover design shows a photo of cowboy boots sitting on the beach in front of the ocean.

The overall design, graphics and color use in the brochure are good. This piece does not oversell the area and fairly depicts what one would find when visiting. There are changes that could be made to this piece to make it more compelling and drive a higher conversion rate.

Cover recommendations:

- *Use the research identified positioning on the top front 1/3 of the brochure. It must jump out of the rack! The current typeface is difficult to read!*
- *The photo of boots on the beach is clever but doesn't tell the whole story. Use a cover photo that will appeal to every reader and correctly position the visitors experience on the island.*

The inside of the brochure is a little better than we typically find in other destinations in that it offers fairly clear evidence of the "attractors" – those things that are of primary interest to the visitor. The beach jumps out at the reader and we clearly see scenes of coastal fun and relaxation. Good.

The black typeface used in the narrative paragraphs is dull and doesn't beg to be read. Titles would draw the eye to the copy and bullet points are more effective in a rack brochure. The copy effectively describes the pictures but falls short of compelling the reader to visit. The photos are doing all the work.

Once inside we found a small map is provided that offers good indicators for where South Padre Island is placed within Texas. Additionally, the map provides directions to the island for those coming to the island by car or plane. On this panel we also found a monthly calendar of events that is in tiny typeface. Remember those baby boomer vacation planners that need reading glasses. Avoid using typeface this small.

The inside fold out of the brochure is a small poster that shows a collection of photos that highlight the most popular tourism activities. A short poem is in the middle of the page, and the toll-free number and web address are at the bottom. This is a big pretty layout that didn't deliver a call to action. What is the next step in the planning process? The phone number and website address are provided but we would prefer to see a call to action that tells us that we can receive a complete vacation planning packet by calling or logging on to the website.

Marketing Materials Analysis

Our biggest concerns regarding the rack brochure include:

- Lack of effective positioning on the front
- Lack of “emotional connection” copy immediately upon opening the piece
- Wonderful action photography with dull copy that doesn’t deliver the same sense of excitement
- Lack of a call to action

Overall, we’d rate the piece a B-. The lack of effective positioning on the front is the major concern because this means that unless a tourist already had interest or knowledge about South Padre Island, they may not pick up this piece. Again, it is better than many brochures we find and will deliver improved results with the implementation of the changes recommended here.

Our recommendations for future refinement of this piece include:

- Change the front top 1/3 to include the recommended positioning statement based on research. Graphics and design should compliment that positioning.
- Use a “pay off” line at the bottom of the front panel to complete the message offered at the top.
- The first thing a potential visitor should see inside is wording, photos and design that immediately put one “in the scene.” Use wording that depicts the senses (touch, see, smell, taste, feel, hear) to instantly convey the experience that awaits the potential visitor. Make them feel as though they must visit in order to complete the experience.
- Next, the visitor should be told the “must sees” - - those things that distinguish South Padre Island from other destinations.
- The next element for the rack brochure is to suggest itineraries. This shortcuts the trip planning and makes it easier for the tourist to choose South Padre Island. Offer two, three, and five day itineraries.
- Following this should be a listing of all attractions in the area with a simple two or three line description. In addition to the itineraries and “must sees” outlined above, this communicates to the potential visitor that there is a lot to see and do here.
- Next, a map should show where South Padre Island is in relation to the state and the southeast.
- Seasonal information should be included where applicable.
- Include photos that show people having a good time and photos that show great scenic beauty and capture the experience one is likely to have on South Padre Island.
- Include the website address at the bottom of every page or panel.
- Include the telephone number to call for more information on every page.
- Include the street addresses for the visitor centers and hours of operation.
- Make sure the typeface is clear, legible and at least 10-point type size.

Marketing Materials Analysis

2. South Padre Island Visitor's Guide

The Visitors Guide is the cornerstone of the South Padre Island CVB marketing program. This is the brochure that is used in the fulfillment of all requests for visitor information that come into the CVB.

Based on our research, the South Padre Island CVB Visitors Guide is definitely doing its job. The conversion rate of visitors who received the guide is almost 35%. That is a good conversion rate! The guide is seventy (70) pages and includes information on area attractions, activities, major events, tours, lodging and vacation planning information. Other complementing or auxiliary brochures include the "Things To Do...While On South Padre Island" and a South Padre Island Convention Centre Brochure.

The front cover of the Visitors Guide simply states "South Padre Island Visitor's Guide". Research has shown that it is far more effective to have a "hook" that positions the area effectively in the top front 1/3 of the Visitors Guide. Ideally a simple statement should be in this space to compel people to pick up the guide and read it. The current layout is effective when placed in local brochure racks where people may be looking for a guide around the area after they have arrived. This layout can also be effective in brochure racks and mailings if, and only if, the reader or recipient has prior knowledge as to what and where South Padre Island is located. This positioning in the top front 1/3 is the first step in engaging the visitor. Words, photos and the design should immediately place them "in the scene." This combination of images should instantly convey the experience that awaits them. *RTM recommends that the front of the next visitor guide contain the expanded positioning statement found in the Marketing Strategies Section of this report.*

Upon opening the brochure, the reader comes across 2 ½ pages of advertising before the table of contents and another full-page advertisement before the Welcome section. Although we understand the need to offset the cost of the guide by advertisement sales, we do recommend, if at all possible, that the guide not use ads. Controlling the presentation of information is key in creating an experience for the visitor. If the advertisements distract from the guide contents, then they are a disservice to both the South Padre Island CVB and the advertiser. You want to engage the visitor immediately with a list of "must sees" and then go immediately into suggesting itineraries that quickly inform potential visitors they need to stay for several days, then go on to provide the all the details you have packaged in this guide.

Marketing Materials Analysis

In the Welcome section and the three-page section on “Our History,” the visitor is given a lengthy narrative on South Padre Island. The verbiage used here is good but a bit lengthy. It clearly portrays South Padre Island as a quality destination. The research identified the average age of visitors reading this guide to be 46 years old. This is the age when reading glasses start to become necessary and the small typeface on this page is a challenge. *We recommend cutting this verbiage by half and using this space to feature the research identified positioning elements or “must-sees” for the area. Once this is accomplished the reader will read the core positioning on the cover and be compelled to open the guide where the reader will then find an easy to read list of the “must-see” or “don’t miss” activities in the area.*

Readers of the current visitor guide then see a three-page spread on Port Isabel and Brownsville in the “Our Neighbors” section. Information about the attractions in these cities is incorporated in the lengthy text. The historical information for these two cities, along with that of South Padre Island, needs to be moved to the back of the guide—while this information is interesting, it is not vital information for the visitor planning his/her trip, nor will it affect visitation. The attractions information in this section should be included in the South Padre Island attractions section. Remember, the attraction does not have to be physically located on South Padre Island – it just needs to help create overnight stays on South Padre Island.

The typical tourism visitors guide attraction section has too many listings with very little information about each attraction. South Padre Island's attraction section, on the other hand, does not include enough listings. This section should include all of the attractions in Port Isabel and Brownsville, as well as all of the activities and tours associated with day-trips to Mexico. In addition, Gulf and bay fishing, nature tours, dolphin watches, etc. should all be highlighted in the attractions section. Again, the important thing to remember here is to highlight any activity in the area that will help maximize the experience of the visitors and has the potential to drive overnight stays. *Feature the research identified “must sees” then show all of the attractions in the area that might convince a potential visitor to stay an extra day or two.*

Marketing Materials Analysis

Some overall design recommendations for the Visitors Guide are included below.

Design the guide from the research-identified priorities for the potential visitor

- Change front of piece to include positioning statement and offer compelling reasons to visit the South Padre Island area.
- As with the rack brochure the first thing a potential visitor should see inside is wording, photos and design that immediately puts one "in the scene." Use wording that depicts the senses (touch, see, smell, taste, feel, hear) to instantly convey the experience that awaits the potential visitor. Make them feel as though they must visit in order to complete the experience.
- Next, the visitor should be told the "must sees" - - those things that distinguish South Padre Island from other destinations.
- The next step is "How To Use This Guide" and tell the visitor where to locate information and any other information such as codes, etc.
- After identifying the "must sees" the next area of interest for the tourist is attractions, activities and itineraries. Basically, they want to know what there is to see and do and how to plan their trip. The smart DMO will do all the thinking for the potential tourist and show them how to plan their time. This is certainly not a new concept. Guidebooks such as Frommer's and other retail guidebooks understand that if they want to win customers they have to make it easy for the potential visitor. Often we see in these guide books information which states "If you only have one day in the South Padre Island area," and "If you have two days," and so forth. This is a perfect approach. The commercial guides use this for a reason. It works. And research tells us that customers greatly prefer this approach. Thus, we recommend this for the South Padre Island CVB.
- Perhaps ad sales are critical to the production of this piece, however, ad placement should be thought through from the perspective of the customer. If the customer has to work to locate desired information, the piece is non-productive for the DMO *and* the advertiser. Placement of ads needs to be strategic to the interest of the customer.
- After the itineraries, a listing of attractions is desired. This tells the visitor what options are available during their stay. It is expected for the listing of attractions to be in alphabetical order. As long as one has already identified the attractors or "must sees" this is a good approach. Be sure to include a brief description of what the visitor will see, do or experience ("Why should I go there?"), directions and a street address (not a post office box), accurate hours of operation, costs and other details.

Marketing Materials Analysis

- The most frequent complaints we hear from visitors about listing of attractions include:
 - Why should I (or my family) be interested in this?
 - How do I find it?
 - When is it open?
 - How much will it cost?
- The next question in the visitor's mind is "Where will I stay?" Thus, the next logical information to be presented is a listing of hotels and lodging options. Previous research tells us that visitors want a great deal of information. They prefer photos of the lodging properties as well as a listing of amenities. They prefer to have the listings segmented by hotels, bed & breakfasts, inns, camping, resorts, etc.
- Visitors who have never been to South Padre may be confused by lodging listings categorized as "Bay" and "Gulf". "Beachfront" and "Bay" may clarify the issue for the first time visitors.
- The next issue for the tourists is dining and shopping. Tourists report that they want to know about the unique local dining and shopping as well as the chain stores and malls. They prefer the shopping information to be segmented by unique shopping and the typical chain stores and malls. They prefer to see dining options listed by category and including "unique local flavor" as a heading. This heading should be separated from the chains or other categories for types of dining. Many people choose chains because they feel comfortable with the predictable quality. However for many tourists, they are looking for the unique foods from that region. Make it easy for them to identify which is which.
- The next interest for visitors is special interest. Specifically this usually means golf, outdoor recreation, hiking, biking, etc.
- Nighttime entertainment options are the next area of interest and should be addressed with a special section. This needs to include nighttime entertainment for families as well as adults.
- Special packages would be next.
- Tourists consider general information helpful, but not necessary.
- A good map, preferably a fold out map with accurate detail, is considered *critical* to the potential tourist. Visitors are accustomed to getting frustrated attempting wayfinding and this is the opportunity to diminish that obstacle.
- Finally, the tourists want to know where to find further information. RTM recommends having the website address at the bottom of every page plus prominent and clear information on the address and phone number to call for assistance.

Marketing Materials Analysis

Overall, the guide is a good source of easy to find information. Our biggest recommendation is to strengthen the attractions section, include dining information in this visitors guide and make it a "one-stop shop" for trip planning. Research has shown that once you use the "must-sees" to compel visitation you must help the trip planner find lodging that is conveniently located to the activities of interest to them.

By carefully reading the research results, and reviewing these recommendations, the South Padre Island CVB and its design/advertising partners can determine the best new layout for any revisions to the visitors guide.

An exact recommended layout and format for both the recommended "lure" brochure and the visitors guide can be found in the Marketing Strategies section of this report.

3. **South Padre Island Convention/Group Tour/Meeting Planners Guide**
As with the materials outlined earlier in this document, this is a good piece and offers quality information for the tour planner. It provides all the normally encountered information.

Our specific comments regarding this piece include:

- Good introduction! For the typical "speed reading" tour planner, this gives a very good and quick overview that offers great appeal.
- This piece is well designed for the budget that is allocated. It is a lot of information in a very efficient format.
- This is a comprehensive piece and covers all the expected sections for information plus some bonuses. Again, kudos on the quality of information.
- Most of all we like the fact that this Meeting Planners Guide sells the total destination. Research has shown that attendance is down at conferences and seminars nationally due to the time crunch experienced by most Americans. Therefore, meeting planners have learned that they have to host meetings at exciting locations if they want to get attendance.

Overall, we feel that this piece, designed on this budget, goes as far as is possible. Our one major concern is that it is somewhat difficult to file in a standard letter size file drawer due to the comb binding. The CVB might investigate spiral binding that will be smaller, easier to file and still allow the book to lay flat on a table when open.

For enhancement, RTM recommends more "sizzle" for this piece via design and formatting.

Marketing Materials Analysis

Specifically our recommendations include:

If the budget for this piece cannot be increased:

- Keep this general format but re-order the sections.
- Reorganize the table of contents. Put the attractions under a separate heading from the activities. As it is, it looks like a little too much to absorb. Restructuring will help this.
- Move the itineraries to a more prominent position (first or second).
- Add a summary of attractions page with simple two line descriptions for each. As it is, there are almost too many pages to turn to "hunt for the good things."
- Make sure the driving distances include primary markets found in this research.
- A shopping section needs to be added that focuses on the unique shopping in the area.
- Add a section for seasonal interests.
- Add the phone number and website address at the bottom of each page. Make sure you have a section/page on your website exclusively for groups.

If the budget for this piece can be increased:

- Include the "hook" positioning statement on the front.
- Include the same "emotional connection" style wording immediately upon opening the piece. Remember that group tour planners are tourists too and they need to be "sold."
- Use some "wow" photos or design that conveys the experience a group is likely to have.
- Add color and graphics. There are many words in this document and it requires breaking up with color and design to retain the interest of the planner.
- Clearly identify the "must sees" for the area.
- Be sure itineraries can be found prominently and toward the front that include the "must sees" and then round out the experience for the group.
- Make sure you have a section/page exclusively for groups on your website.
- Use photos of actual meeting/event rooms set up for events
- Show some of the "unique" themes or events that have been used before that might make a meeting or event in South Padre unique and thus drive a higher attendance at the meeting.
- Provide a map that locates the meeting, events, lodging and dining facilities so the planner can see how they relate to one another.
- Show the number of overflow lodging rooms that are available within walking distance of each primary meeting facility.
- Put convention and event services offered by the CVB in bullet-point format. It is more effective than reading text.

Marketing Materials Analysis

4. **South Padre Island CD-Rom**

This is an attractively packaged CD-Rom that matches the design of the rack brochure. The CD has eight major elements: a video, island info, things to do, tourism, meetings & conventions, media, film commission and contact information for the CVB. We toured the contents of this CD using a new state of the art Dell Personal Computer with a large high definition monitor. Overall we found the CD to be a nice teaser piece that provided glimpses of the area, but it failed to deliver on content. If we wanted to learn more about a photo or activity that we saw, we needed to go to the website or contact the CVB.

The CD-Rom was fun new technology when introduced but recent enhancements in website technology have made this form of technology unnecessary when promoting a destination. Therefore we recommend the following:

- Do not replace the current supplies of these CDs
- Put this content on the re-designed CVB website
- Use the content of this CD as an email promotion using the new Impatica software that allows you to send video emails without the requirement of downloading additional software.

5. **Website - www.sopadre.com**

Our critique of the South Padre Island CVB website is current as of June 20, 2001, the most recent date that we logged on to the site. This is an important distinction because websites must be updated continuously to be current for the inquiring visitor. It must also be noted that recent regional and national research has indicated that travelers are flocking to the web for travel planning at record numbers. This trend is certain to continue and the website will soon replace the brochure as the number one marketing tool for DMO's.

The research found in Section 4 of this report reveals this website to be the number one source for information among those planning a trip to the area. Therefore, this site must be the first and primary focus of future marketing efforts. The South Padre Island CVB is to be commended for the great work that they have already done on their website—they are further ahead than many larger Convention and Visitors Bureaus. This is a very good site and our recommendations for improvement are limited to the content within each page of the site.

Marketing Materials Analysis

Keywords:

The best site in the world is ineffective if the web surfer can't find it. Make sure that all possible keywords are registered with the search engines. Include common misspellings of town and attraction names so that poor spellers can find you too. Our search for the site using various search engines produced only several links to the South Padre Island CVB site. The CVB site is not registered effectively with search engines, and this is an on going process that must be monitored continually.

Search for your own site regularly to make sure that common misspellings still lead the web surfer to your site. In addition, there is some confusion created by the website (www.southpadre.org and www.visitsouthpadre.com) that bills itself as the "Official Information Source of South Padre Island."

Home Page:

The South Padre Island CVB home page is the best part of the site with attractive graphics and layout. RTM suggests adding interactivity to the website home page, as consumer research has shown that a static website has little appeal. Visitors Guide, Spring Break, and Birding are highlighted sections on the page. RTM suggests making the Visitors Guide link larger and more visible—we missed seeing it on our first couple of visits to the site. Easy decision making on this page is critical and the site delivers.

Using the research identified core positioning found in this report, the imagery of the website should be edited to make it match any new marketing materials. We like the clean headlines on each page of the site. The toll free number should be prominently displayed at every turn. The point is to let the site visitor know to call if they get frustrated looking through the site. Research has shown the toll free number to be the first avenue taken when people become frustrated while searching through a website.

Meetings and Conventions:

This section provides planners with all the relevant information needed to plan a tour trip or meeting on South Padre Island. This should be basic information that provides the reader with simple buttons to order additional detailed information.

- Add simple bullet points at the top, "Top Ten Group Activities."
- Add the most popular group itinerary

Marketing Materials Analysis

Events Calendar:

Many sites forget this important piece of information. The listing is long and thorough but doesn't offer compelling information to sell each event. It's a list. What are the top three to five events each year? Which ones are "must sees"? The biggest challenge here is to keep the information current and updated (critical).

- Put the "Don't Miss" events at the top
- Include thumbnails to click and see pictures
- Include links where they are available
- Add and encourage lodging packages

Personal Trip Builder

As we began searching the attractions information, we noticed the "Add" buttons on the right and decided to click one to see what it did. It took us to the Personal Trip Builder, which creates a list of all of the activities/lodging that we are interested in. Kudos! This is a great tool that helps facilitate a trip for a visitor. *As most visitors will want to view the attractions information first, RTM recommends highlighting the Personal Trip Planner on the Visitors Guide page so that a visitor will know about it before they jump into the information.*

Attractions:

People come to an area to see or do something so this section must be the most compelling and interactive. Using the research to identify the most popular activities for the traveling public, feature those activities and in great detail. Make it a virtual visit. Use ample pictures and any copy should have a "you are there" style that puts the reader in the experience. Some points of interest:

- Put a list of five "Don't miss these" at the top of the page (the research in Section 4 identifies these for you).
- The long list of names without pictures is boring and unappealing. Not many people will take the time to click on each and read about them all. Provide pictures of each then click for detail.
- The links in the attractions listings are good.
- "Click to enlarge photo" should be added.
- Put phone numbers and driving directions as bulleted items

Marketing Materials Analysis

Lodging:

Once people decide to visit based on the attractions, they look for lodging. We like the fact that the accommodations section allows you to search by type of lodging property desired. Unfortunately, what you find is a rather dull listing of information. This will work better for the consumer with pictures of each lodging property on the initial listing page. Then add additional photos to each lodging properties detail page. Active links to the lodging properties are provided but we had little success using these. The links brought up unwanted ads that had nothing to do with SPI and in some cases brought up the wrong lodging property. Critical points to consider:

- Add the AAA logo to the rating? This is very compelling for many travelers, especially the age groups identified in the research.
- Including the links to the individual lodging property websites is very good and few DMO websites have accomplished this step. Bravo!
- Lack of photography prevents the reader from seeing what the lodging looks like, but speeds the process when the screen is "loading". Encourage the lodging properties to provide photos that load quickly.
- This website must include a button "book a room" in the coming months. We have seen CVBs that make a commission from this.
- Call the beachfront lodging "beachfront" and not "gulf".

Shopping:

The research identified shopping as very popular among visitors but not a big driver of spending. Few, if any, website visitors will take time to contact another agency for information. Shopping can be the number one source of traveler spending in the area if you take this space and sell it. A few changes here will change this trend:

- Feature the "Unique Shops" that appeal to tourists
- Photos and descriptions will put the reader in the unique shops and increase the desire to visit.
- Research studies have shown that consumers like coupons that can be printed from the website. "Free T-shirt with purchase over \$50" would be a popular coupon concept and make the website advertising trackable.

Marketing Materials Analysis

Restaurants:

All travelers eat. In fact, they eat more when traveling than when they are at home. So show them what is unique about dining in the region. The current listing reads as a list and doesn't visually compel the reader to "come and eat". Put the reader visually and verbally in the experience!

- Put the "unique local dining experiences" at the top and include photos and compelling descriptions. Make those mouths water!
- The unique experiences will get the website visitor to convert to a customer who will still eat at plenty of other local eateries. Promote that which will COMPEL a visit!
- Drop the alphabetization and put the unique and local at the top, after all, they are visiting a unique area and want to leave with a memory.
- Again, coupons for dining would be revenue generators for the CVB and make website advertising trackable.

Additional website sections include:

Boating & Watersports

Fishing

Eco-Tourism

Sports & Recreation

Nightlife

These are good sections that include links where available. More detail needs to be added to each listing to help the "first-timers" and novices understand how easy it is to participate in each of these activities.

The rule is: "A picture is worth a thousand words." Apply that rule throughout the website and in all of these sections. This is a good informational list, but it doesn't go far in romancing the unique qualities of these activities.

Area Maps:

This is a decent locator map of the city. The revised website should include a map that includes Texas and the surrounding states that locates South Padre Island and includes driving mileages from major points. Next there should be a good island map that identifies the locations of lodging and attractions specifically.

- Check out the Brevard-Transylvania, North Carolina website at www.visitwaterfalls.com. This site has a comprehensive map device that tailors the map to the user's needs.

Marketing Materials Analysis

Vacation Packages:

The traveling public demands packages and "kudos" to South Padre Island for including this section on its site. RTM recommends including packages that have themes around the various activities in the area. The only other addition we suggest would be the all-important "click here to purchase" button.

Overall:

The website loads quickly and effectively and presents the detailed information concerning the South Padre Island area. It is doing a good job for South Padre Island CVB and should be constantly improved upon to be fresh, compelling, interactive, informative and easy! The following topics should be added to the new site:

Suggested Itineraries:

This section should address the stressed traveler's need for ease of planning. This is how you can keep them on land instead of taking a cruise.

- Put a featured button on the home page for "Itineraries."
- The itineraries should be written so that they "put the reader in the experience" and compel visitation!

On-Line Coupons:

Coupons on the website that can be printed and brought along on the trip to South Padre Island would be a big hit. An increasing number of websites are offering coupons to the delight of travel planners. Coupons for shopping, attractions, dining, golf and fishing excursions would be popular with potential visitors.

Beaches:

Beaches are the big attractor for the area so feature them. Web cams have become popular and there could be a web cam on a beach so visitors could log on to see the beach! Sell those big wide beaches!

Media Assistance

This is your media kit on-line. It is great information for a travel writer as it is "on-demand". An image gallery should be included to give the writer a wealth of information at their fingertips. Writers should be required to register to gain access so you know who looked at your story ideas.

Reconnaissance Report

Methodology

A professional reconnaissance team visited the South Padre Island area at the request of the South Padre Island Convention and Visitors Bureau (SPICVB). The dates of preliminary site visitation were January 5 - 11, 2001. Additional visits were made by RTM associates in February and April 2001.

The goal of the Reconnaissance Team was to experience the South Padre Island area from the eyes of the visitor. Therefore, the team made all of its schedules and arrangements using the tourism marketing materials made available by the South Padre Island CVB, the Texas State Visitors Guide, the Texas State Welcome Centers, various regional materials and the Internet sites for both the state and the South Padre Island CVB. Attractions listed in these materials were located and visited. The team also explored restaurants, shopping and lodging where possible. The area was seen in the best possible conditions, as the weather was seasonable throughout the visit.

Dr. Larry Gustke, Ph.D., N.C. State University (who received his Ph.D. from Texas A&M) developed the professional method of selection, evaluation and analysis used in this process. The report does not follow any chronological order since we visited many areas more than once and tried to enter and exit the area from all of the possible routes used by visitors. The following is a documentation of the Reconnaissance Team's findings.

Overall

Overall, South Padre Island is a wonderful vacation destination option that has unique positioning elements and great potential.

From speaking with visitors to the region and based on personal observation, South Padre Island is considered the nicest beach in Texas. It enjoys warm, tropical weather, great wide scenic beaches, a good number of lodging units and adequate amusements and attractions. It is a good family destination and appeals to adults traveling without children as well. The Island has earned a reputation for unique birding and naturalist activities ranging from sea turtles to other flora and fauna. Geographically, the Island has an ideal location. It is a primary beach destination option for the entire middle U.S. Its tropical climate makes it significantly appealing to "Winter Texans" or those residents in the north mid-west who seek to escape the cold temperatures and weather. The Island has not been developed as heavily as one might expect. Thus, there appears to be significant room for growth.

Overall, our biggest concern after our initial reconnaissance and intercept interviews is the lack of a "vision" and master plan for tourism growth.

Reconnaissance Report

Our most significant overall observations during reconnaissance include:

- Most people we interviewed throughout the region report that SPI is the nicest beach in Texas. This rating is followed secondly by Corpus Christi and last by Galveston.
- Travelers rate SPI high primarily due to tropical weather conditions, the natural beauty and good prices.
- SPI seems to be enjoying its turn as a winter destination choice. Many interviewees had previously been to Hawaii or Florida for their winter escape from the cold and after tiring somewhat of those destinations, now chose SPI. They like what they find and intend to return again.
- There is little upscale lodging on the Island and no full-service hotels. This will limit the economic potential of the Island – especially in convention recruitment.
- This is primarily a leisure destination as it has very limited meeting and convention space compared to other destinations. Also, group tour potential is limited by the number of hotel rooms (vs. condominiums) and group attractions.
- There are a good number and variety of attractions and amusements either on SPI or in nearby places. The largest apparent unmet need is for rainy day activities and attractions that will compel extended shoulder season stays.
- Retail is available in a limited amount, although good quality merchandise is available and there is some upscale shopping. RTM definitely sees a need for more high-end retail.
- RTM finds it strange that the convention center is located at one end of the Island and the majority of hotel rooms are at the opposite end of the island. This does not make sense and is not desirable to convention attendees. When we inquired as to why this decision was made, we heard a variety of reports including desired growth at the north end to the self-serving interests of landowners.
- Travel to SPI seems to be primarily via automobile. RTM was concerned that signage and wayfinding information is inadequate to the task. Also, although Harlingen Airport does an excellent job of partnering with SPI for transportation to the Island, the Brownsville Airport is closer and much less expensive for travelers to fly into. However, this airport needs upgrading and needs to seriously enhance its leisure visitor welcoming and facilitation.

Gateways

The ancient Egyptians understood the importance of gateways. Nomadic travelers emerged from the desert and found huge avenues lined on both sides by massive golden Sphinxes leading them to huge gated entrances into the walled cities. It was impossible to arrive at the ancient Egyptian cities without having a sense of awe at the city before you.

Since most American cities have grown concentrically from a center core, the arriving visitor is usually first exposed to the industrial and manufacturing sites on the perimeter of the destination. Visitors are usually forced to wind their way through a labyrinth of commercial roads and expressways to find the heart of a destination. Along the way a clutter of signs, one larger or taller than the other, each competing for the travelers attention, tend to distract the driver and prevent all passengers in the vehicle from having a positive first impression of the unique qualities found in the destination. Further, the dramatic proliferation of retail shopping has made most landscapes generic and void of unique, local architectural and cultural aspects that create a "sense of place". Therefore, it is vital to a destination to create dramatic and impressive gateways that welcome visitors to their city and create a positive first impression. A good gateway prepares the arriving visitor for the experience that will be encountered in the area.

The following includes our documentation for gateway analysis:

Harlingen Airport

This is a very attractive modern airport. Kudos to the airport for having a large "Welcome To Harlingen and the Rio Grande Valley" banner prominently displayed. We found numerous references to South Padre Island throughout the airport and even souvenirs from South Padre Island prominently displayed in the gift shop.

We noted that Southwest Airlines seems to be the dominant carrier with approximately 10 flights daily, all to and from other Texas locations. Other carriers included Continental with approximately 6 flights daily from Houston. American Airlines had approximately 6 flights daily from Dallas. Sun Country Airlines had 1 flight from Minneapolis. We understand this airline only runs this route in the winter.

Upon exiting the airport we found excellent signage directing travelers to South Padre Island. It is clear that this is the primary airport for South Padre Island. We found it interesting that flights into Brownsville were significantly less (less than half the cost) than Harlingen, yet Brownsville is much closer.

Reconnaissance Report

Brownsville Airport

Arriving at the Brownsville Airport our team found no signage that welcomed us to the City of Brownsville or the South Padre Island area. We found no visitor information. Display billboards can be found along the entry corridors to the main terminal, but we found nothing for promotion of South Padre Island. We did note there was construction in progress. Continental Airlines is the primary carrier serving this facility.

Also, our team noted that the signage leaving this airport and directing travelers to South Padre Island (SPI) is very limited. At several points one is required to stop and ask directions, as adequate directional signage is not available.

Houston Bush Intercontinental Airport

Although this is not the most modern of airports they deserve good marks for providing a strong sense of gateway. One is *very* clear they have arrived in Houston. At many airports we visit one can enter and leave without every having known where they were. Kudos to this airport for effective signage and creating a strong sense of place for Houston. Also, the airport interior signage and advertising prominently promotes various activities and things to see and do while visiting Houston.

We noted nothing in this airport relative to South Padre Island other than the Departure information at Continental.

Auto Rental Facilities – Brownsville Airport

The auto rental facilities at this airport are small and the lots for rental cars are limited. One concludes there is a limited car rental activity at this airport. Upon renting a car, we inquired what there was to see and do in the area. The attendant replied, "Well, there are some clubs, but there really isn't anything other than the beach." Our team noted that the maps provided by the rental car company did not show SPI. We also inquired as to restaurants on SPI and Blackbeard's was immediately suggested. We noted that the attendant did not have a highlighter at the workstation to use in providing guidance to auto renters. This indicated again that providing directions and visitor information is not a frequent task at this facility.

Reconnaissance Report

Auto Rental Facilities – Harlingen Airport

Again, kudos to the Harlingen Airport for establishing a visual connection with South Padre Island. In the auto rental area, this visual connection was evidenced by the large, lighted wall map display depicting the entire area including SPI. We inquired at several of the auto rental desks about volume of car rentals to SPI and were informed there were a significant number of rentals for travel to SPI. Maps that we were given included SPI. We inquired at a several of the auto rental company desks and were told that a significant number of their customers were renting autos for travel to SPI. Also, compared to the Brownsville Airport, the size of the auto rental desks here were standard size, indicating the sizeable volume of business conducted here.

Driving From Harlingen To South Padre island

Travelers driving from Harlingen to SPI view a nice, typical southern Texas landscape of ranches, grasslands, Mesquite Trees, shrub/bushes and some commerce.

We noted the limited amount of directional signage indicating directions to SPI. There is virtually nothing along State Road 100 to provide adequate wayfinding and offer reassurance that the traveler is correctly traveling to SPI. We did note a good amount of billboards including: Ramada, Super 8, Howard Johnson, Bahia Mar, retail store Barbara, Radisson and Casino South Padre.

Gateway Signage Into South Padre Island

South Padre Island is to be acknowledged for having an excellent gateway sign upon entry onto the Island from the causeway. The sign features the SPI logo, a welcome message and is lighted in the evening, has lovely landscaping and clearly informs visitors they have arrived. A banner across the road from the gateway sign also colorfully welcomes visitors and proclaims the positioning of South Padre Island as "The Tropical Tip of Texas." We immediately liked this positioning as it is clearly descriptive and provides island/beach distinction while also announcing the location of this destination. Kudos South Padre Island!

Passing the sign, travelers clearly find signage directions to the visitor information center.

Welcome / Visitor Centers

Travel research shows that many travelers orient themselves to an area that they are visiting by beginning their trip at a welcome or visitor center. These information centers are usually funded by the state or local governments and are intended to provide travel and trip planning information for the traveling public. Staffing at these information centers is usually full-time with some part-time or volunteer assistance. Many local visitor centers are staffed entirely by volunteers. The traveler usually forms the all-important first impression of an area while they are in the visitor center. Visitor centers should be staffed by friendly well-informed people, who enjoy using the brochures, maps and guides in stock to help the visitor plan their stay. A visitor center is a front-line sales agency that should proactively place visitors in lodging, dining attractions and retail. This is the opportunity to make direct economic impact on an area.

South Padre Island Visitor Center

We were pleased to find the SPI Visitor Information Center located conveniently near the entrance to the island from the causeway. Also, kudos to the visitor center for having a light-up display information board that assists travelers who arrive after operating hours. We also found an outside rack brochure for after hours brochures, but it was somewhat hidden away and not as obvious as the light-up display.

Upon entering the visitor center at noon on a Saturday, we found the facility quite busy. We found a reception counter with two ladies in attendance, a counter in the center of the room with brochures below, calendars on the top, etc. Around the perimeter of the room are large, lighted photos and beneath the photos brochures were displayed. To the right we noted a large display for lodging information. We were not greeted upon entry. It was very confusing for us to know where to begin.

We walked to the counter and one of the ladies asked "May I help you?" We told her we were first time visitors to the Island, had just arrived and did not know where to begin. She pulled out the large, 8 ½" x 11" visitor guide and said "We will begin by welcoming you with our visitor guide." She did not open the guide so as to engage us, but rather handed it to us. She then pulled out a black and white photocopied map and oriented us to the Island by showing us where the visitor center was located on the map, the beaches, the access paths to the beaches and the types of businesses located along the three main boulevards on the Island. This was informative and helpful. She then handed us the brochure titled "Things To Do While On South Padre Island." Next she handed us the Sea Turtle, Inc. brochure, then the free shuttle brochure, then the fishing guide brochure which she opened and showed us the chart of the different fish and in what season they were caught. This was followed by her handing us the Gladys Porter Zoo brochure.

Reconnaissance Report

We asked if the zoo was nice and she replied that it was one of the top 10 small zoos, thus setting our expectations fairly high. Next we were handed the SPI Golf brochure and the Island Equestrian Center brochure. She said riding horses on the beach was great fun. We then asked about dining. She replied there was an abundance of good dining that could be found listed in the visitor guide but she was not allowed to recommend any. We then stated that we would be celebrating an anniversary and wanted a fine dining restaurant. Without hesitation she recommended The Radisson.

At that point we roamed through the visitor center looking at the various brochures and handouts. We noted that most of the visitors were seniors who were asking about activities and events. We found a large display binder mounted on the center counter that contained menus from local restaurants.

However, we must report our second mystery shopping experience at this visitor center. A different member of our team entered on a Tuesday morning and was ignored during the entire visit. Although there was a visitor center staffer behind the information desk, she was on the phone and then busied herself with other activities and never acknowledged his presence or asked if he needed help. He walked in, looked around, gathered brochures and after approximately 5 minutes left the building. There were approximately 3 different travel parties in the center during that 5-minute period and all were ignored. It disappoints RTM to have to report this lack of performance.

State of Texas Welcome Center – Harlingen

We visited this welcome center to determine what trip planning information travelers approaching SPI from the north might find. This center is new and modern, conveniently located in Harlingen and has ample parking and good restroom facilities.

Upon entry the first thing one sees is an architectural photo of the visitor center. We would have preferred to see photos here of great things to see and do in the region. Entering the visitor information center one finds sets of Texas state visitor guides ready and waiting on the main information counter. Each set includes a map and specific information for visiting the Rio Grande Valley. We found this very convenient for visitors. We noted nice information displays in the room. Each rack of brochures was topped with a Lucite map indicating the geographic section of Texas for the brochures found below. The first brochure rack one sees is the one for the SPI region. Unfortunately however, we found no brochures for SPI here.

Reconnaissance Report

The only brochures for SPI to be found in the State Welcome Center rack were:

- Osprey deep sea fishing
- Texas Hospitality deep sea fishing
- Fish Tales dolphin watch
- Combination rack card for Super 8 Motel, Howard Johnson's and Ramada Limited
- Port Isabel Historical Museum

In addition to the information racks we noted a small theater with nice seating. We guessed that this is used for showing a video, although none was playing when we visited on a Friday.

The attendant greeted us fairly quickly after our entry. After we roamed around the brochures for a moment, she asked if we needed help. We told her we were headed to SPI and were looking for information. She informed us that she had mostly information on fishing excursions for SPI. She told us where the convention and visitors bureau information center on SPI was located and suggested we stop there for more information. Then she stated, "Wait, I think I got some new visitor guides in from SPI yesterday." She went into the back and came back with the SPI Visitor Guide and handed that to us unopened.

We looked around for a few more minutes. We noted the lovely garden created at the rear of the visitor center. Then we left.

South Padre Island Convention Centre

RTM is concerned about the location of this convention center, currently at the opposite end of the Island from the vast majority of hotel rooms. From numerous previous studies with convention decision makers, being forced to drive *any* distance from the meeting facility to hotel rooms is not desired and often unacceptable.

This 70,000 square feet multi-use building is adequate for small conventions and meetings. It includes 22,500 square feet of column-free exhibition space, 9,000 square feet of flexible view-oriented meeting rooms, a theater containing audio and visual equipment for multi-media presentations, a central lobby and kitchen facilities.

The "Whaling Wall" on the exterior of the building provides a unique focus point for convention goers and leisure visitors as well.

South Padre Island needs to realize that the size of this facility limits the type of groups that can be attracted to this facility. Also, as stated earlier, RTM is concerned about the distance to lodging rooms from this facility.

These factors must be taken into consideration in targeting potential convention and meeting groups. Much time can be wasted by going after groups that will only choose another location that offers more convenience.

Attractions

Typically we find attractions listed in tourism promotion materials in alphabetical order. This is done to be “politically correct” and to give all attractions equal attention. Unfortunately, this is not in the best interest of the customer. The tourist wants to know the “attractors” or those things that are “must sees” while in the area. Other attractions are important to the visitor and should be identified, but should be described accurately and in context. Also, it is critical to include accurate hours of operation, street addresses (rather than mailing addresses) and cost of admission. Any other charges, such as parking fees, should also be noted. A suggested amount of time required for a visit to this attraction is an excellent feature. If the attraction is targeted at children or perhaps more appropriate for adults, it is good to include this in the description. Also, if an attraction is not open on the weekend, the attraction should probably not be included. Weekends are the busiest time in tourism and if a particular attraction is not open on weekends, those tourists who have misread the hours of operation and arrive to find a closed facility will be disappointed. Doing these things prevents customer frustration and helps the guest facilitate a visit.

Those attractions that achieve excellence usually offer:

- Excellent signage and wayfinding to the attraction.
- An orientation for each visitor to help them understand why the attraction is worthy of their time, what they will learn, see, do and/or experience and how best to spend their time at the attraction.
- Clean and accessible rest rooms.
- Guided, narrated tours and interpretive experiences (or user-friendly self guide materials). Incorporating the senses (visual, hearing, touch, smell, taste) is important in creating an interactive experience. Static “read the plaque and look at the artifact” type museums or attractions suffer complaints from today’s demanding tourism customer.
- Benches, chairs and other resting spots where a weary traveler can pause for a moment’s rest.
- Suggestions from the attraction for other things to see and do in the area as well as lodging and dining recommendations to better help the customer plan their visit.

During the reconnaissance, the team differentiates between attractors and attractions. Attractors are the events, facilities and “things to see and do” that motivate people to buy an airplane ticket or get off the interstate and visit a place. Attractions are “things to see and do” that complement or supplement the major reason or purpose for travelers to visit a place. We differentiate these because of the importance they play in attracting visitors. Our observations and impressions focus on the value and pull power of attractors and attractions.

Reconnaissance Report

Overall

Currently the number and variety of attractions for visitors to South Padre Island is adequate but limited. If one travels to other relatively close communities and areas, one can find a good variety of amusements and entertainment options. Our team's assessment is the Island would benefit from more rainy day activities, increased retail (especially high end) and other amusements to entertain visitors to SPI. On rainy days and in inclement weather, there is little for visitors to do other than movies or staying in their room. Also, it is critical that the SPICVB work diligently to inform visitors about all attractions to be found on the Island and nearby.

South Padre Island Beach

Clearly, the beach is the top attractor for South Padre Island. This is a beautiful, wide and scenic beach. As opposed to other beaches that allow driving on the beach and have a series of posts/barricades, here one can simply enjoy the unencumbered view and the glory of nature. As was underscored in numerous intercept interviews, this is considered the prettiest beach in Texas.

Also, the beach allows for a wide variety of water sports including fishing, surfing, windsurfing, etc.

South Padre Island Golf Club

Based on the brochures and promotional materials we were surprised to find that this course was actually *NOT* located on SPI but rather in nearby Laguna Vista. Although we found numerous brochures and ads for the golf course, we noted that none included the address or other wayfinding information. After asking around we finally discovered exactly how to find this site.

We were told the development has been open for three years and we observed a golf course that is well maintained with a scenic layout along the Laguna Madre.

Our team was impressed with the marketing partnerships that this course has developed with SPI lodging, restaurants and other businesses. This is the kind of promotional partnership that the traveling public demands.

In talking to local restaurateurs and hoteliers we were told that golfers are seen regularly in SPI while making use of this facility. While at one of the lodging properties conducting intercept interviews we talked with a group of insurance executives who had just played the course and were quite complimentary of the course and its condition. In fact they reported they planned a return trip with a larger group.

Reconnaissance Report

Three Flags Over Padre

This attraction was closed on our weekday mid-January visit during reconnaissance. We learned that this facility is open during the spring-fall time period on a daily basis. During the winter months it is open on weekends from noon until evening hours. One finds go-carts, miniature golf and various recreational amusements. The facilities appeared to be a bit worn. This looks to be a good nighttime entertainment option for families with younger children.

Sea Turtle, Inc.

Founded by "The Turtle Lady," this unique attraction provides a wonderful "edutainment" experience for visitors to SPI. We visited on a Tuesday for the half-hour interpretive session and enjoyed what we learned about the turtles, the work of this facility and the life and times of its founder. In talking with the volunteer attendants we learned that the facility is quite busy during the summer months, hosts school groups during the school year months and hosts primarily "Winter Texans during the winter months.

Also, during our reconnaissance visit we learned about the planned new facility near the convention center. We heartily commend this development and encourage the leaders of South Padre Island to make this sort of natural preservation a trademark of the Island's continued development. A facility of this quality and unique appeal will have regional, national and international appeal. Kudos and keep up the great work!

Laguna Atascosa Wildlife Refuge

One of our team members is an active birder and eagerly anticipated visiting this wildlife refuge. SPI is well known for its birding and naturalists activities. This wildlife refuge is well maintained, with nice restroom facilities, a park interpretive center, photo blinds and observation areas and plentiful print materials including books and guides. It's perfect for any birder or naturalist and a significant asset for the Island.

Equestrian Center

This attraction provides one of the most sought after vacations dreams – getting to ride a horse on a beach. We encountered several groups starting their excursions during our reconnaissance visit. Several of our intercept interviews had ridden the horses as well. Most visitors we spoke with had heard of this attraction whether they chose to participate or not. The only negative report we received was from those who came back a little more saddle-sore than expected!

In touring the facility one finds a well-maintained stable with plentiful horses and ponies.

Fishing Charters and Nature Excursion Boats

Reconnaissance Report

Our team visited several fishing and nature cruise providers and found a nice assortment of boats, most of which appeared to be in excellent or good condition. Most of the services we talked with told us that they were quite busy during the summer and not so busy during the winter months. Spring and fall are relatively busy.

In talking with visitors we found that these facilities appeal to a variety of fishing levels from novice to experienced fishers. We would even encourage these outfitters and excursion providers to promote a "Learn To Fish – We Provide All Equipment" excursion. Fishing is a fun beach activity and we wondered if there were others who would go, but assumed they needed proper equipment or skills to be able to participate.

For the nature excursions we talked with numerous visitors who had taken these excursions and loved them. Virtually everyone we talked with had seen dolphins. Several of the providers we interviewed said it was almost a guarantee that each boat would encounter dolphins because they are so plentiful in the area. Dolphins are extremely popular today making this one of the "must see" activities while visiting South Padre Island. We rate this as a definite attractor.

Shopping Tours To Mexico

This seems to be a popular activity with "Winter Texans" as several reported to us they had taken these excursions. Several of the visitors we spoke with had glowing comments about the service and the personality of their guide. We saw people using this as a rainy day activity. One hopes that these shopping excursions will give visitors an incentive to perhaps stay a day longer in the area.

Regional Attractions

Port Isabel Lighthouse and Interpretive Center

A visitor to South Padre Island cannot miss this attraction, as they must pass by this site going to and from the Island. Lighthouses are always popular with the traveling public and this lighthouse has a wonderful history and has been nicely maintained. The interpretive center at the lighthouse contains an excellent record of the history of this lighthouse and its role in the development of the area. We were very pleased to find this to be a good attraction for those visiting SPI.

Port Isabel Historic Museum

This small museum packs a lot of “edu-tainment” and history into a small package. We were impressed with the quality of the exhibits for such a small museum and city area. The attendants were quite informative and helpful. We noted approximately eight other visitors touring the museum during our visit there. Most of the visitors were “Winter Texans” staying on SPI. As this was a cloudy/rainy day they were seeking indoor amusements. Our team learned a great deal about the region, its history, the agriculture and other industries and the people. We also found clean restrooms and drinking fountains. The story of the mural inside was of interesting note as well. A great story! Kudos to this museum for a job well done!

Treasures Museum

This appears to be a relatively new museum facility. Kudos to Port Isabel for developing this “museum district” in order to get their share of the visitor dollar in South Padre Island. We also learned that many of the displays and exhibits in this museum were created by local volunteers! They’ve done an exceptionally nice job. We noted a highly interactive children’s play area with clothes to try on and archeological digs, etc. We did notice that the visitation to this museum seems very light and encourage the museum to continue its work and promotional efforts. They started something good here and should continue to develop the product so as to create greater appeal.

Gladys Porter Zoo

We were very impressed with this attraction! We had been somewhat skeptical when told that this was “one of the top 10 small zoos in the U.S.” and were thrilled to find the report accurate! This is an exceptionally good small-scale zoo with modern and progressive natural habitats for the animals.

The zoo was enjoying good attendance on the January day we visited, attesting to its popularity. Most of the guests we encountered were local and regional residents.

Iwo Jima War Memorial

Reconnaissance Report

Near the Harlingen Airport one finds a truly "visit-worthy" attraction in viewing the full-scale model of the Iwo Jima War Memorial at the Marine Military Academy. Donated by sculptor Dr. Felix W. de Weldon, the statue was the original working model of the famous bronze statue found near Washington's Arlington Cemetery. It is a most impressive work and it is very interesting to find this original work here.

Rio Grande Valley Historical Museum Complex

We visited this historical museum site and found it to have a good, architecturally attractive exterior, nice landscaping, good parking space and easy access. Unfortunately, we arrived after operating hours and thus cannot rate the museum experience.

Fort Brown/University of Texas at Brownsville

We toured the campus of this university on a rainy January day and found it to be a lovely campus with wonderful architectural features. We particularly were looking for the parrots that make this campus their home, but unfortunately found none. The campus is not particularly of visitor interest other than for birders or those out sightseeing.

Historic Brownsville Museum

This is a lovely architectural beauty of a museum housed in a restored 1928 Southern Pacific Railway depot. We did not go in as we got here after operating hours and thus cannot rate the museum experience. But the building is worth the trip.

Sabal Palm Grove Wildlife Refuge

We drove into this wildlife refuge and noted that there is no interpretation that informs and educates visitors as the type of palms here or the distinctions between these and other palms. We did find very nice birding and wildlife viewing trails and interpretation. This is another excellent product for naturalists and birders visiting the area.

Stillman House Museum

We drove by this home of the founder of Brownsville but found it closed after 5:00pm. The house and gardens looked interesting and we wish we had been able to get here during operating hours.

Shopping

Reconnaissance Report

Nationally, shopping is the most popular activity while traveling. In fact, recent studies have shown that travelers rate their vacation experience higher based on higher levels of retail spending. In other words, the more money spent shopping, the better the vacation. This is particularly the case in resort destinations. Large outlet malls have been cropping up on America's coastline to take advantage of this trend. That first rainy day of vacation delivers overflow crowds to the large malls where vacationers accomplish back-to-school, household, gift and Christmas shopping. A full year worth of shopping can take place in a matter of days! This is in addition to the traditional souvenir buying that remains popular for travelers. Therefore, shopping is an important attractor for a community and a major area of economic impact for the local economy.

Overall

Generally speaking we found the shopping options on South Padre Island adequate. Mostly we found the typical t-shirt and beachwear types of shops, a grocery store, souvenir and convenience stores. There is a limited amount of upscale shopping.

RTM encourages the leaders of SPI to look at other beach areas and the significant shopping that occurs. Many beach destinations such as Myrtle Beach have a wide range of shopping options including outlet malls, etc. Shopping is the number one identified desired activity for all vacationers. This can be a source of significant economic impact for South Padre Island and its neighbors.

Ship Shape

We visited this shop and found good quality merchandise including clothing and gifts. We noted several other shoppers buying goods, including some tourists who knew the owner. According to the owner, she gets many annual repeat visitors to this store. With her outgoing personality, it is easy to see why.

South Padre Island Mall

When we visited, this mall was undergoing renovation. It is an awkward layout, but could be developed to be a great rainy day option, or as a wonderful and unique shopping experience while visiting the Island. Also in summer and winter this would be a good place to get out of the hot or cold. We expected to find upscale shopping, chocolates, coffees, designer clothes, etc. Instead we found very little of interest to out of town visitors to the island.

B & S Kite Shop

Interestingly we were told at this kite shop that the Winter Texans are their best customer segment. This is a cute shop with all sorts of kites and windsocks, which are perfect for an island adventure.

Sisters

Reconnaissance Report

We visited this shop and learned from this storekeeper that it is the summer family segment that is their best customers. We loved the diverse assortment of merchandise at this shop and the after Christmas sale!

Restaurants & Dining

When visiting an area we always look for the unique dining experiences that would appeal to travelers. When in Maine most folks look for lobster, pineapples in Hawaii and TexMex in the southwest. During reconnaissance, we asked local people on the street, at attractions and at other encounter points where to find good local food. We asked for restaurant recommendations all over town and the dining spots mentioned most often (in order) were:

- Blackbeard's
- Ramada Hotel Windjammer Restaurant
- Lantern Grill
- The Brewery
- Jessie's Mexican Restaurant
- Jonathan's
- The Yacht Club

Lantern Grill

This is a fabulous restaurant and we thoroughly enjoyed our dining experience. During this study everyone we talked with who had eaten here rated it very highly. This must be regarded as one of the top fine dining experiences on South Padre Island.

The Brewery

We had dinner here on a Monday night, realizing that it is really unfair to judge any restaurant by its Monday night product, as this is when most chefs take their day off. We are pleased to report that the barbecued ribs this eatery is famous for were as good as reported.

The Radisson Windjammer Restaurant

We had several meals at this restaurant including breakfast, lunch and dinner. The service was always excellent and the food of good quality. Although we were not overly impressed with the quality of the food, it was better than average.

The Amberjack Restaurant

This is a most attractive casual dining option on SPI. Our team had Sunday brunch at this eatery and found the place packed, the food quite good and the service excellent. We noted the "outdoor dining" area which was not in use during our wintertime reconnaissance.

Rovan's Bakery and Restaurant

Our team lunched at this comfortable restaurant and was surprised at how large the facility is once one enters. We were also impressed with the variety and abundance of baked goods and pastries. The service here was good as well as the food.

Reconnaissance Report

Whataburger

As this is a unique fast food experience for travelers we were compelled to have a burger. They are fast, good quality and the restaurants are open 24 hours.

Pirate's Landing

This restaurant was recommended to us as a place for good seafood. For vacationers, this setting with views of the water and the lights of SPI across the bay and good seafood are the dining experience they expect to find at the beach.

Yacht Club Restaurant

We saw advertising for this restaurant, but unfortunately had a good deal of difficulty locating it. We even stopped and asked for directions and although told "we couldn't miss it" we managed to do so. We had heard this was good choice for dinner, but unfortunately did not get to sample the wares as we couldn't locate the place.

We did go back during the daylight and at last found the site. We interviewed the owner who reported he had heard of others having difficulty locating this facility. Apparently the food really is excellent and earns repeat visitation. We were impressed with the long tenure of the chef and most of the staff for the restaurant.

Reconnaissance Report

Lodging

When conducting reconnaissance in an area the team always looks for lodging that would most likely appeal to the vast majority of the traveling public.

Therefore, the Reconnaissance Team selects our lodging for the reconnaissance using the marketing materials provided by the local tourism promotion agency, the state and brochures found along the way in racks. Once in the area, the Reconnaissance Team looks at all available lodging properties to determine the range of lodging options that are available in the area. The team also looks to see if the national chain properties are well maintained and that locally owned properties are adequately advertised and represented correctly in promotional materials.

Overall

A fax survey is sent to all lodging properties as part of this study. During our reconnaissance we had an opportunity to speak with a good number of managers and front desk staff to ask them about their market mix, overall occupancy and average daily rate (ADR). As an overview, we learned that year round occupancy averages about 65%. This market is quite seasonal with significant distinctions between the different seasons. Winter is primarily "Winter Texans" followed by Spring Break (university and college crowds), then Easter and Holy Week, then the traditional summer family market, then in autumn the convention and meeting crowds.

Observing license plates during our January reconnaissance our team noted the majority of visitors were from Texas, Michigan, Iowa, Wisconsin, Minnesota, Illinois, Indiana and mostly mid-west markets. We also learned that Mexico is a major market, primarily from Monterey.

Saida Four Condominiums

Since condo rentals are a significant portion of the lodging market on SPI we spent one evening in a condo in order to see what type of accommodations were provided. In our "shop calls" we made very sure to say we were a business group and needed to have a quality condo that could be shared by three business colleagues. The company we chose ensured us that the unit they placed us in would be of high quality and suitable for our business travel. Although our unit had a great view of the ocean we were quite disappointed at the quality of the furnishings, mattresses and linens. It seemed to be more of a "party condo" than what had been described to us. We only stayed one night and requested to be released from our reservation. The staff person who handled our complaint processed our request efficiently and without question. Although we were disappointed we were pleased with the way the rental company processed our release without question.

Radisson Hotel and Condominiums

Reconnaissance Report

We stayed at this property and were very pleased with the quality of our rooms. We had modern furnishings, excellent mattresses and linens and adequate electrical outlets for our various business needs. We found service at this property to be very good at all times. This property is well-maintained and has very nice pool and spa area with nice landscaping.

Sheraton

We toured this facility and were impressed with the lobby and exceptionally attractive pool and outdoor areas. From what we viewed, this was the nicest pool and spa area on the Island. The rooms were good standard rooms.

Holiday Inn

We were informed this property was recently renovated and toured the property. The rooms are very nice and it should be noted that several people told us these were the nicest rooms on the Island (presumably due to the fact that they were recently remodeled). They are very nice rooms decorated with a tropical flair. When we visited the lobby and common areas were still being renovated.

Texas Tourism Facts & Figures

Economic Impact and Travel Spending Statistics

(Source: The Economic Impact of Travel on Texas, Texas Department of Economic Development, October 2000).

Texas Statistics

1. Travel spending by all domestic and international visitors in Texas reached \$36.7 billion in 1999. This represents a 7.6% increase over 1998.
2. Travel in Texas has increased at an average annual rate of 6.1 percent since 1990. Adjusted for inflation, travel spending has increased at an average rate of 3.4 percent over the same time period.
3. Texas' share of the domestic travel spending is over 6 percent. Only California and Florida have a greater market share.
4. Local tax revenues were \$623 million in 1999. State tax revenues were \$2.0 billion. Federal tax revenues were \$2.8 billion.
5. The total tax impact (local, state, federal) of visitor spending in Texas was \$5.4 billion in 1999. Without this travel generated tax revenue, each household in Texas would have had to pay \$740 in additional taxes to maintain current service levels.
6. During 1999, visitor spending in Texas directly supported 470,000 jobs (an increase in 2.4 percent over 1998) with earnings of \$10.6 billion (an increase of 7.7 percent). Travel spending generated the greatest number of jobs in eating and drinking establishments (146,000 jobs), followed by accommodations (84,000) and recreation (87,000).

State of Texas Research Review

1999 Report of Travel To Texas Statistics (Source: The Report of Travel To Texas, Texas Department of Economic Development, Full Year 1999).

Texas Statistics

1. In 1999, the volume of travel to Texas grew (up 7 % to 375 million Person-Days) more quickly than the U.S. as a whole (up 4%). Texas ranked 3rd behind California (569 million Person-Days, 9.7% of U.S. travel) and Florida (541 million Person-Days, 9.2% of U. S. travel).
2. Nearly two-thirds (63.0%) of Texas travel originated within the state, compared to a U.S. average of 37 percent.
3. The average age of travelers to Texas was 43 years old.
4. Average household income of travelers to Texas was \$57,700, slightly lower than the average for the U.S. - \$58,700.
5. The average length of stay for overnight travel by Non-Texans was 4.0 nights and 2.4 nights for Texans, as compared to 3.2 nights for the U.S.
6. The most popular mode of transportation was the automobile.
7. Leisure travel accounted for 69% of total travel to Texas. This is a 1 percent increase from 1998.
8. The activities engaged in by travelers to Texas include: Visiting Friends and Relatives (28%), Sightseeing (17%), Visiting Historic Sites (9%), Visiting Museums/Attending Plays (8%), and Visiting Theme/Amusement Parks (7%).
9. The average expenditure per person per day for Texas travelers was \$96, a little lower than the nation average of \$99.
10. Ten states generated 56.2% of Leisure Air travel and 65.9% of Leisure Auto travel to Texas.
11. A substantial percent of travel in Texas (62.6%) was by Texans, while 37.4% was by Non-Texans.
12. The top origin states for Auto travel were: OK (15.0%), LA (15.0%), CA (6.0%), AR (5.4%), NM (6.1%), KA (4.9%), IL (4.1%), AL (4.0), MS (4.0%) and FL (4.0%).
13. The top origin states for air travel were: CA (16.1%), FL (4.8%), NM (4.7%), IL (7.0%), MI (4.4%), OH (4.4%), NY (4.1%), GA (4.2%), WA (3.3%) and AZ (3.2%).

Study Methodology:

Quarterly intercept interviews were conducted over the course of one year as part of the overall tourism market research study being conducted for the South Padre Island Convention and Visitors Bureau. The purpose of these interviews was to further document visitor perceptions by season in addition to the mail survey component of the research.

The methodology for these intercepts includes two full days of interviews each season, including one weekday and one weekend day. A few interviews were conducted at each location on several different days of the week over a two month period. The following locations were used to conduct the interviews.

- Convention Centre
- Laguna Madre Nature Trail
- Bahia Mar Resort
- Radisson Resort
- Sheraton Resort
- Saida Towers
- Suntide Resort
- Isla Blanca Park
- Sea Turtle Inc.
- Local Restaurants
- Beaches

All four seasonal, quarterly reports have been conducted. Those findings have been tabulated and are included in this report, along with a comparative analysis.

Summary of Intercept Interview Findings and Responses

1. What is your home zip code?

Winter 2001

Texas - 12 (22.64%)

Arlington
Brownsville
Harlingen
Houston
Jourdanton
Klein
Lewisville
Livingston
Mc Allen
Plano
San Antonio
San Benito

Illinois - 5 (9.43%)

Auburn
Coal Valley
Harvard (2)
City Not Given

Maryland - 5 (9.43%)

Columbia
Crownsville (2)
West Friendship
City Not Given

Michigan - 4 (7.55%)

Kalamazoo

Livonia

Martin

Rockford

Minnesota - 4 (7.55%)

Fairmont
Grand Rapids
La Porte
Wyoming

Iowa - 3 (5.66%)

Alpha

Denver

Ottumwa

Canada - 3 (5.66%)

City Not Given (2)

Alberta

Indiana - 2 (3.77%)

Indianapolis

McCordsville

Alaska - 1 (1.89%)

Homer

California - 1 (1.89%)

Murrieta

Colorado - 1 (1.89%)

Denver

Kansas - 1 (1.89%)

Leavenworth

Kentucky - 1 (1.89%)

Mayfield

Missouri - 1 (1.89%)

Saint Peters

North Dakota - 1 (1.89%)

Cando

New Jersey - 1 (1.89%)

Oakland

New Mexico - 1 (1.89%)

Albuquerque

New York - 1 (1.89%)

Cortlandt Manor

Ohio - 1 (1.89%)

Mc Clure

Oklahoma - 1 (1.89%)

Newalla

South Carolina - 1 (1.89%)

Aiken

Wisconsin - 1 (1.89%)

Monroe

United Kingdom - 1 (1.89%)

City Not Given

Spring 2001

Texas - 25 (65.79%)

Bastrop

Bonner

Brownsville

Corpus Christi (16) (42.08%)

Houston

Nuevo Laredo (2)

San Antonio (3) (7.89%)

Mexico - 4 (10.53%)

Mexico - City not given (4)

New York - 3 (7.89%)

Maybrook

Montgomery

Yonkers

Michigan - 2 (5.26%)

Muskegon (2)

Country Not Given - 1 (2.63%)

Los Mochis Sinaloa

Florida - 1 (2.63%)

Orlando

Louisiana - 1 (2.63%)

Pierre Part

Oklahoma - 1 (2.63%)

Oklahoma City

Summer 2001

Texas - 24 (88.89%)

Aransas Pass

Austin

Brownsville

Corpus Christi (3)

Dallas (2)

El Paso

Ft. Worth (2)

Houston (3)

Laredo

Lewisville

McAllen

Rockport (2)

San Antonio (2)

San Marcos

Tyler

Victoria

Colorado - 1 (3.70%)

No city given

Florida - 1 (3.70%)

Avon Park

Mexico - 1 (3.70%)

Monterrey

Summary of Intercept Interview Findings and Responses

Fall 2001

Texas-15 (48.4%)

Bishop

Corpus Christi (7)

Deer Park

Harlingen

Houston (2)

Ingleside (2)

Los Indios

New Mexico-4 (12.9%)

Albuquerque

Cannon AFB (2)

San Antonio

California-2 (6.5%)

Beverly Hills

San Diego

Kansas-2 (6.5%)

Kansas City (2)

New York-2 (6.5%)

New York

Westbury

Pennsylvania-2 (6.5%)

Morristown

Trafford

Arkansas-1 (3.2%)

Little Rock

Colorado-1 (3.2%)

La Junta

Michigan-1 (3.2%)

Argyle

Oklahoma-1 (3.2%)

Tulsa

Traveler Point of Origin By State & Season

STATE	Winter '01	Spring '01	Summer '01	Autumn '01
Texas	22.6%	65.8%	88.9%	48.4%
New Mexico	1.9%	--	--	12.9%
Mexico	--	13.1%	3.7%	--
Illinois	9.4%	--	--	--
Maryland	9.4%	--	--	--
Michigan	7.5%	5.3%	--	3.2%
Minnesota	7.5%	--	--	--
Iowa	5.7%	--	--	--
New York	1.9%	7.9%	--	6.5%
Canada	5.7%	--	--	--
Indiana	3.8%	--	--	--
Alaska	1.9%	--	--	--
California	1.9%	--	--	6.5%
Colorado	1.9%	--	3.7%	3.2%
Kansas	1.9%	--	--	6.5%
Pennsylvania	--	--	--	6.5%
Florida	--	2.6%	3.7%	--
Oklahoma	1.89%	2.6%	--	3.2%
Kentucky	1.9%	--	--	--
Louisiana	--	2.6%	--	--
Arkansas	--	--	--	3.2%
Missouri	1.9%	--	--	--
North Dakota	1.9%	--	--	--
New Jersey	1.9%	--	--	--
Ohio	1.9%	--	--	--
South Carolina	1.9%	--	--	--
Wisconsin	1.9%	--	--	--
United Kingdom	1.9%	--	--	--

The findings from this question confirm the wide variety of states from which winter Texans come to South Padre Island and the more specific markets that drive visitation in the other seasons of the year. Texas is by far the number one market for South Padre according to this data.

Summary of Intercept Interview Findings and Responses

1a. Do you own property on South Padre Island?

	Winter '01	Spring '01	Summer '01	Fall '01
No	95.35%	100.00%	86.11%	97.06%
Yes	4.65%	0.00%	13.89%	2.94%

This question was asked to verify that the majority of the interviews were conducted with those who were staying in transient lodging.

2. How many days will you be away from home during this trip?

	Winter '01	Spring '01	Summer '01	Fall '01
Range	0 - 30	0 - 7	0 - 30	0 - 8
Average	15.39	2.56	4.65	2.56

Knowing the average length of stay of the typical visitor to the island is valuable information when preparing future marketing efforts. Clearly winter Texans drive a much longer length of stay (15.39 nights) followed by summer vacationers who averaged 4.65 nights. Spring and Fall visitors reported and average length of stay of 2.56 nights.

The information reported here matches the travel patterns reported in most major national research studies of traveler behavior.

Summary of Intercept Interview Findings and Responses

3. Including yourself, how many people are in your travel party?

ADULTS	Winter '01	Spring '01	Summer '01	Fall '01
Typical Response	2	2	2	2
Average Number	2.54	2.20	2.6	2.17
% of visitors traveling with adults only	77.78%	67.35%	50.00%	30.00%

CHILDREN	Winter '01	Spring '01	Summer '01	Fall '01
Typical Response	2 - 3	1 - 4	2 - 3	2 - 4
Average Number	2.25	2.44	3.00	2.53
% of visitors traveling with children only	22.22%	32.65%	50.00%	70.00%

The winter Texans are most likely to travel in adults only parties (77.78%) followed by Spring travelers (67.35%), Summer (50%) and Fall (30%). Again these statistics are typical of what we see in other coastal destinations that have strong retiree visitation in the winter and family markets in the Spring, Summer and Fall.

4. Have you ever traveled to South Padre Island before this trip?

	Winter '01	Spring '01	Summer '01	Fall '01
No	51.85%	50.00%	56.00%	50.00%
Yes	48.15%	50.00%	44.00%	50.00%

If yes, how many times?

	Winter '01	Spring '01	Summer '01	Fall '01
Range	NA	NA	1 - 15	1 - 24
Average	NA	NA	3.57	5.72

The data here is consistent throughout the year and shows an equal number of first time visitors and repeat visitors were interviewed. The question "If yes, how many times?" was added to the questionnaire for the summer interviews and thus no data is available for the winter and spring interviews.

Summary of Intercept Interview Findings and Responses

5. Please name the months in which you've visited before?

	Winter '01	Spring '01	Summer '01	Fall '01
Jan	36.36%	0.00%	4.55%	9.38%
Feb	21.82%	0.00%	4.55%	9.38%
Mar	7.27%	22.00%	18.18%	43.75%
Apr	9.09%	8.00%	0.00%	28.13%
May	7.27%	16.00%	13.64%	15.63%
Jun	5.45%	12.00%	36.36%	15.63%
Jul	10.91%	24.00%	54.55%	21.88%
Aug	5.45%	8.00%	22.73%	18.75%
Sep	3.64%	0.00%	9.09%	25.00%
Oct	3.64%	0.00%	9.09%	53.13%
Nov	5.45%	0.00%	0.00%	31.25%
Dec	7.27%	0.00%	0.00%	15.63%
No response	47.27%	50.00%	56.00%	38.46%

The data above shows the difference in repeat visitation patterns for the different seasons of the year. The "No Response" category represents those who were visiting South Padre for the first time.

Winter Texans are most likely to come during the months of January and February with an equal distribution of prior visits throughout the year.

Spring Visitors are most likely to come in the Spring and early summer months.

Summer visitors also skew toward the spring and summer months.

Fall visitors are likely to have been to South Padre in the spring, summer and fall but not the winter months.

This information is helpful to assist the CVB in developing repeat visitation programs for island visitors during the various seasons of the year. Winter Texans will be most interested in returning during the winter months while the fall visitor will be interested in all months except the winter months.

Summary of Intercept Interview Findings and Responses

6. What was the main purpose of this visit to South Padre Island?

	Winter '01	Spring '01	Summer '01	Fall '01
Attend A Festival	0.00%	0.00%	2.00%	0.00%
Birding	2.08%	0.00%	4.00%	0.00%
Business	2.08%	5.00%	4.00%	12.00%
Day Trip	0.00%	5.00%	4.00%	6.00%
Fishing/Boating	2.08%	2.50%	4.00%	4.00%
General Relaxation	8.33%	17.50%	18.00%	20.00%
Get Away From Cold/North	4.17%	0.00%	2.00%	0.00%
Meeting/Convention	2.08%	2.50%	2.00%	2.00%
Nature Studies	0.00%	0.00%	2.00%	0.00%
Other (see below)	2.08%	2.50%	8.00%	4.00%
Outdoor Recreation Day Trip	2.08%	0.00%	0.00%	2.00%
Overnight As Part Of A Longer Trip	2.08%	5.00%	0.00%	2.00%
Relocation	0.00%	0.00%	2.00%	0.00%
Reunion	2.08%	2.50%	0.00%	4.00%
Vacation/Getaway	60.42%	52.50%	44.00%	30.00%
Visit Friends/Relatives	10.42%	5.00%	4.00%	14.00%

Winter '01 "Other" responses include:

- Beach
- Ocean
- Relax
- See everything
- Winter Break

Spring '01 "Other" responses include:

- Clubbing

Summer '01 "Other" responses include:

- Art Festival
- Honeymoon
- Attractions

Fall '01 "Other" responses include:

- Mexico
- Winter Resident

The findings here are typical of what we see in research conducted for coastal destinations and confirms that South Padre is primarily a leisure destination for vacations and get-aways.

Summary of Intercept Interview Findings and Responses

7. Where did you find the information you needed to plan a trip to South Padre Island?

	Winter '01	Spring '01	Summer '01	Fall '01
AAA Tour Guides	3.64%	2.00%	4.00%	0.00%
Already Knew – Been There Before	20.00%	36.00%	26.00%	20.41%
Convention Info	3.64%	2.00%	4.00%	12.24%
Family/Friends	29.09%	48.00%	42.00%	40.82%
Fodor's Tour Guides	0.00%	0.00%	0.00%	0.00%
Magazines	14.55%	0.00%	8.00%	2.04%
Newspaper travel feature stories	1.82%	6.00%	4.00%	6.12%
South Padre Island Visitor Guide	14.55%	4.00%	6.00%	4.08%
South Padre Island Visitors Center	3.64%	6.00%	4.00%	2.04%
South Padre Island web site	10.91%	14.00%	36.00%	12.24%
Texas State Travel Guide	1.82%	4.00%	6.00%	4.08%
Texas Tourism web site	9.09%	10.00%	2.00%	10.20%
Texas Welcome Center	0.00%	0.00%	0.00%	2.04%
Other (see below)	14.55%	14.00%	12.00%	0.00%

Winter 2001 Magazines included:

- Midwest Living
- National Geographic
- Southern Living
- Woman's Day

Spring 2001 "Other" included

- Corpus Christie Visitors Center
- Convention
- Friends From Monterrey Mexico House
- Live Close By
- Previous Experience
- Texas Map

Summer 2001 "Other" included

- Art Festival

Fall 2001 "Other" included

- Live There 3 Months a Year

The data here provides excellent clues as to which outreach methods are the most effective for each of the seasons of the year. This data must be compared to the mail survey data for comprehensive analysis.

Summary of Intercept Interview Findings and Responses

8. *As I read the following list of activities, please tell me if any member of your travel party has or will do these on this trip. (circle all that apply). Top responses in bold.*

	Winter '01	Spring '01	Summer '01	Fall '01
Attend a Festival	1.82%	10.00%	8.00%	10.00%
Beach Sport Rental	7.27%	12.00%	18.00%	12.00%
Biking	5.45%	2.00%	6.00%	10.00%
Birding/Wildlife	23.64%	0%	6.00%	6.00%
Boat Rentals	3.64%	16.00%	14.00%	12.00%
Boat Tours: Dolphin/Nature	12.73%	10.00%	14.00%	26.00%
Boat Tours: Fishing	3.64%	12.00%	6.00%	10.00%
Boating	3.64%	6.00%	10.00%	16.00%
Business	3.64%	4.00%	4.00%	10.00%
Camping	3.64%	2.00%	8.00%	10.00%
Driving/Sightseeing	30.91%	26.00%	2.00%	12.00%
Fishing	14.55%	22.00%	18.00%	26.00%
Golf	13.36%	8.00%	18.00%	20.00%
Meeting/Seminar	0.00%	2.00%	4.00%	6.00%
Shopping	60.00%	40.00%	24.00%	40.00%
Sunbathing/Beach	74.55%	60.00%	60.00%	52.00%
Visit a Historic Site	9.09%	4.00%	4.00%	8.00%
Visit a museum	7.27%	12.00%	6.00%	18.00%
Windsurfing/Surfing	0.00%	8.00%	2.00%	12.00%
Other	27.27%	10.00%	14.00%	6.00%

Winter '01 "Other" responses include:

- Boogey Boarding
- **Dining / Eating (2)**
- Metal Detector
- **Mexico (6)**
- Motor Bikes
- No Casino Boat
- Own Their Scooter
- Read / Puzzles
- Walking / Running

Spring '01 "Other" responses include:

- Bars
- Beach
- Clubbing
- Eating
- Restaurants

Summary of Intercept Interview Findings and Responses

Summer '01 "Other" responses include:

- Art show
- Brownsville Bird Festival
- Honeymoon
- rides
- Water park (2)

Fall '01 "Other" responses include:

- Nightlife
- Meet Pen Pal
- Eating

The data here is particularly helpful in identifying the leisure activities that are most preferred throughout the seasons of the year. This data is directly comparable to the responses reported in the mail survey found in section 10 of this report.

Summary of Intercept Interview Findings and Responses

9. Name any attractions/restaurants/etc. that you visited on South Padre Island and rate each on a scale of one to five (where 1=poor, 3=average and 5=great).

Winter '01

Attractions	Visited	Rating
Isla Blanca Park	30.00%	4.40
Port Isabel Lighthouse	30.00%	4.63
Andy Bowie Park	27.50%	4.50
Edwin K Atwood Park	27.50%	4.22
Sea Turtle, Inc. – Home of the “Turtle Lady”	25.00%	4.67
Port Isabel Historical Museum	22.50%	4.63
Gladys Porter Zoo (Brownsville)	22.50%	4.89
Movie Theater	20.00%	4.17
Blanca Park	17.50%	4.33
Mall	17.50%	3.00
“The Wave” Free Shuttle System	15.00%	4.40
Laguna Atascosa National Wildlife Refuge	12.50%	4.60
Whaling Wall	12.50%	3.80
Laguna Madre Nature Trail	10.00%	4.50
Other sites in Rio Grande Valley (specify)	7.50%	4.00
Island Equestrian Center	5.00%	5.00
Univ. of Texas-Pan American Coastal Studies Lab.	5.00%	3.50
Confederate Air Force / Rio Grande Wing-Brownsville	5.00%	5.00
Fort Brown (Brownsville)	5.00%	4.00
Ben’s Fun & Sun Kids Park	2.50%	5.00
Matamoros Mexico	2.50%	4.80

Summary of Intercept Interview Findings and Responses

9. (Cont'd)

Spring '01

Attractions	Visited	Rating
Beach	54.00%	3.93
BlackBeards	22.00%	3.82
Louies dance club / bar	14.00%	4.14
Sharky's	10.00%	3.4
Blue Waves	8.00%	4.5
Sea Ranch	6.00%	4.33
Amber Jacks	6.00%	4.33
Fishing	4.00%	4
Boating	4.00%	NR
Hotel	4.00%	2.5
Movies	4.00%	3.5
Water slide	4.00%	4
Lantern Grill	4.00%	3
Shops	4.00%	3.5
McDonalds	4.00%	2
Tour	2.00%	4
Charlies / club	2.00%	3
Little Golf Place	2.00%	4
Mall	2.00%	4
Rovans	2.00%	4
Airport	2.00%	5
Airport restaurant	2.00%	4
Putt Putt Golf	2.00%	4
Restaurants (general)	2.00%	2
Golf	2.00%	2
Dolphin boat tour	2.00%	4
Wave Runners	2.00%	3
Ocean kayaking	2.00%	5
Go carts	2.00%	5
Josephs	2.00%	4
Bike rentals	2.00%	5
Scampis	2.00%	3

Summary of Intercept Interview Findings and Responses

9. (Cont'd)

Summer '01

Attractions	Visited	Rating
Beach	66.67%	4.59
BlackBeard's	35.29%	4.11
Water Park	19.61%	3.50
Mangoes	15.69%	3.75
Lantern Grill	11.76%	4.83
Louis Bar	9.80%	4.00
Go carts	5.88%	4.33
Bungee Jumping	5.88%	4.33
Sheraton	3.92%	3.50
Fireworks	3.92%	5.00
Rovans	3.92%	5.00
B & B	1.96%	5.00
Tom & Jerry's	1.96%	3.00
Coconuts	1.96%	4.00
Convention Center	1.96%	5.00
Dolphin Boat	1.96%	4.00
Fishing	1.96%	4.00
Airport transportation to SPI	1.96%	1.00
Sea Ranch	1.96%	3.00
Scampi's	1.96%	4.00
McDonald	1.96%	2.00
Mexican Restaurant	1.96%	5.00
Micro Hotel	1.96%	5.00
No showers on Beach	1.96%	1.00
Nude beach	1.96%	5.00
Pirates	1.96%	5.00
Radisson	1.96%	4.00
restaurant	1.96%	4.00
La Jaiba	1.96%	1.00

Summary of Intercept Interview Findings and Responses

9. (Cont'd)

Fall '01

Attractions	Visited	Rating
Beach	53.85%	3.86
Blackbeards	33.33%	3.85
Louis Backyard	17.95%	4.29
Mall	17.95%	3.71
Radisson	12.82%	3.80
Sheraton	10.26%	4.75
Condo	5.13%	3.50
Dolphin tour	5.13%	3.50
Golf course	5.13%	4.50
Zoo	5.13%	3.50
McDonald's	5.13%	1.50
Mexico Matamoras	2.56%	4.00
Movies	2.56%	4.00
Museum	2.56%	3.00
Restaurants	2.56%	3.00
Clubs	2.56%	5.00
Cloud 9	2.56%	4.00
Canals	2.56%	4.00
Boatride-Dolphins	2.56%	5.00
Boating	2.56%	3.00
Transportation	2.56%	1.00
Hotels	2.56%	4.00

Knowing the preferred activities of visitors is valuable information when planning future marketing outreach programs. The data for each season should be compared the overall data from the mail survey found in section 10 of this report. Clearly the activities preferred by the winter Texans are quite different from the other three seasons of the year.

Summary of Intercept Interview Findings and Responses

10. What mode of transportation did you use to travel to South Padre Island?

	Winter '01	Spring '01	Summer '01	Fall '01
Automobile	66.67%	69.39%	66.00%	69.39%
Fly / drive (which airport?)	25.93%	28.57%	26.00%	26.66%
Other (specify)	7.41%	2.04%	6.00%	0.00%

Listed for "which airport?"

Winter '01

- Brownsville (4)
- Harlingen (7)
- Houston
- NAS Corpus Christi
- San Antonio

Spring '01 "

- Brownsville (5)
- Brownsville SPI
- CC International (2)
- Harlingen Airport (2)
- McAllen
- Valley International Airport

Summer '01 "

- Brownsville (2)
- CC International
- Harlingen Airport (4)

Fall '01 "

- Brownsville (6)
- CC International
- Harlingen Airport (4)

Listed as "Other"

Winter '01

- RV (4)

Spring '01 "

- Bus Motorcoach

Summer '01

- Another Couple
- Bus
- Fly
- Motorcycle

The majority of travelers to South Padre arrive by automobile (66-69%) followed by those who fly in to a regional airport (26 – 28%). The respondents were equally split between Harlingen and Brownsville. While Harlingen is a far superior airport facility our team found that Brownsville often features lower airfares. Additionally, someone looking at a map can perceive that Brownsville is the closest and most convenient airport to the island.

Summary of Intercept Interview Findings and Responses

11. Approximately how much did you spend during this trip to South Padre Island?

	Highest Amount	Lowest Amount	Average Amount
<u>Winter 2001</u>			
1. Lodging	\$1,900.00	\$30.00	\$750.78
2. Food/meals	\$1,000.00	\$10.00	\$287.62
3. Trans., fuel, airfare, etc.	\$1,000.00	\$5.00	\$271.48
4. Shopping	\$500.00	\$5.00	\$147.76
5. Attractions/amusements	<u>\$200.00</u>	<u>\$4.00</u>	<u>\$83.29</u>
TOTAL	\$2,950.00	\$375.00	\$1,459.64
<u>Spring 2001</u>			
1. Lodging	\$625.00	\$65.00	\$256.03
2. Trans., fuel, airfare, etc.	\$1,500.00	\$5.00	\$254.63
3. Shopping	\$1,200.00	\$25.00	\$192.92
4. Food/meals	\$600.00	\$20.00	\$159.62
5. Attractions/amusements	<u>\$250.00</u>	<u>\$30.00</u>	<u>\$119.00</u>
TOTAL	\$2,300.00	\$45.00	\$659.63
<u>Summer 2001</u>			
1. Shopping	\$1,000.00	\$50.00	\$298.08
2. Lodging	\$1,000.00	\$100.00	\$282.19
3. Trans., fuel, airfare, etc.	\$1,500.00	\$10.00	\$276.58
4. Food/meals	\$500.00	\$40.00	\$210.00
5. Attractions/amusements	<u>\$500.00</u>	<u>\$40.00</u>	<u>\$153.18</u>
TOTAL	\$4,500.00	\$90.00	\$940.00
<u>Fall 2001</u>			
1. Lodging	\$500.00	\$100.00	\$235.74
2. Shopping	\$500.00	\$50.00	\$188.48
3. Trans., fuel, airfare, etc.	\$600.00	\$20.00	\$145.83
4. Food/meals	\$350.00	\$40.00	\$125.00
5. Attractions/amusements	<u>\$300.00</u>	<u>\$25.00</u>	<u>\$115.36</u>
TOTAL	\$1,250.00	\$80.00	\$576.11

The longer stays of the winter Texans made the overall winter figures much higher than the other three seasons of the year which varied within a closer range. Spring and fall spending patterns were similar while summer was the second highest season of the year for overall spending. Additionally, summer visitors reported the highest shopping expenditures while winter visitors reported the lowest. These overall results are directly comparable to the mail survey results.

Summary of Intercept Interview Findings and Responses

12. Overall, on a 5 point scale (where 5 is Excellent, 3 is Average, and 1 is Poor), how would you rate your visit to South Padre Island?

	Winter '01	Spring '01	Summer '01	Fall '01
5 (Excellent)	55.10%	20.41%	46.51%	21.74%
4	28.57%	42.86%	34.88%	36.96%
3 (Average)	14.29%	32.65%	13.95%	15.22%
2	2.04%	4.08%	4.65%	15.22%
1 (Poor)	0.00%	0.00%	0.00%	10.87%
Average Score	4.37	3.80	4.23	3.44

Visitors tend to rate their travel experiences high on the scale because travel, in general, is a pleasurable activity. Therefore we rarely see overall ratings lower than a 4.0 when conducting research for destinations. Our team is particularly concerned about the low scores in the spring. The low spring ratings were a result of dissatisfaction with Easter week crowds on the island. This clearly represents a “carrying capacity” problem that must be addressed. The low fall rating was directly attributable to the loss of the Island Causeway which caused considerable inconvenience for those arriving and departing the island.

Summary of Intercept Interview Findings and Responses

13 What type of attractions or activities would you participate in if offered in the South Padre Island area? (circle the number of all that interest you).

Top responses are in bold.

	Winter '01	Spring '01	Summer '01	Fall '01
Aquarium	34.55%	30.00%	6.82%	14.89%
Arts & Crafts Festival	25.45%	10.00%	9.09%	17.02%
Biking/Cycling Tours	9.09%	6.00%	13.64%	6.38%
Botanical Garden	25.45%	16.00%	11.36%	10.64%
Fine Dining Restaurant	34.55%	36.00%	18.18%	21.28%
Golf Resort	25.45%	16.00%	20.45%	19.15%
Guided Birding & Nature Excursions	23.64%	12.00%	4.55%	4.26%
Man-made Lagoon Where You Can Swim With Tropical Fish	25.45%	38.00%	15.91%	21.28%
Mexico Shopping Shuttle	34.55%	20.00%	15.91%	29.79%
Other (see below)	20.00%	6.00%	4.55%	2.13%
Outlet Mall	25.45%	36.00%	20.45%	46.81%
Rio Grande Valley History & Heritage Museum	27.27%	4.00%	4.55%	6.38%
Water Park	20.00%	50.00%	36.36%	44.68%
Water Sports Learning Center (instructions)	9.09%	16.00%	6.82%	23.40%
Wildlife Festival	27.27%	0.00%	15.91%	4.26%

"Other" responses include

Winter 2001

- Another Bridge
- Aviary Center (5)
- Concerts
- Don't Build Up Too Much
- No Waterpark
- Nothing To Bring More People
- Shopping Mall

Spring 2001

- Bars
- Club Louies
- Putt Putt Golf

Summer 2001

- Go Carts

Fall 2001

- No "other" response given

Summary of Intercept Interview Findings and Responses

14. What do you like or dislike the most about South Padre Island? (write in your answers).

"Likes"

Winter '01	Spring '01	Summer '01	Fall '01
<ul style="list-style-type: none"> • Access To Water / Sewage • All • Atmosphere (2) • Attractions • Beaches (14) • Beauty (2) • Clean Now • Coast • Convenience (2) • Driving Thru The Dunes • Fishing (3) • Food (2) • Friends • Golf • Good For Jogging • Great Place • Maps • Mexico • Natural Beauty • Not Build Up / Undeveloped • Not Crowded • Ocean (2) • People (3) • Prices • Quiet • Relaxing • Resorts • Restaurants (4) • Shopping (3) • Sightseeing • Spanish • Street Signs • Sun • Tranquil • Tropical • Variety • Weather • Weather / Warm (8) 	<ul style="list-style-type: none"> • Activities • Atmosphere (3) • Bars • Beach (15) • Crowds • Drinking • Everything (4) • Fishing (3) • Hotels (4) • Kyaking • Lantern Grill • Louies • Movies • People (2) • Restaurants • Shopping • Sites • Stores • Sun • Traffic • Walking • Water • Water Slide • Water Sports • Weather (3) • Women 	<ul style="list-style-type: none"> Atmosphere Attractions (2) B & B Bars (2) Beach (16) Black Beards (3) Bungee Jump (3) Convention center Everything Fireworks (3) Go carts Gold Courses Great restaurants Joseph's Lantern Grill Louis Restaurant Louis/fireworks More restaurants No men Nude beach Relaxed atmosphere Restaurants (3) Rouans Bakery Sand Water Park (4) Weather 	<ul style="list-style-type: none"> Beach (12) Beach clean (7) Bed & Breakfast Clean environment Climate (2) Desolate areas Dolphin tours Entertainment (2) Environment Fishing Food Golfing Hotels Humidity Inn Lack of tourists Ladies New golf course No traffic once across Nothing People (5) Proximity to home Residents Restaurant Sales Scenery (4) Shopping Sights (2) Town Uncrowded beaches Weather

The responses to this question clearly indicate that it is the beach that draws people to the island in addition to the overall atmosphere of a coastal destination. The unique location of South Padre at the extreme southern tip of Texas and the central United States gives the island additional appeal as one of the warmest coastal spots in the country.

Summary of Intercept Interview Findings and Responses

14. (Cont'd)

"Dislikes"

Winter '01	Spring '01	Summer '01	Fall '01
<ul style="list-style-type: none"> • Beach • Cloudy Days • Commercialism • Cool Weather • Crowded Campground - Noisy • Crowds (2) • Development • Expensive • Fishing Charter Service • Inaccessible When Jelly Fish Come In • Need Children Activities • No Catholic Church • No Hotels • Not Enough Entertainment • Not Enough History • Not Good Shopping • Nothing (3) • Oil / Tar Beach • Overbuilding (6 New Motels) • Portuguese Man Of War • Pulled Over For Speeding • Rain / Cold • Restaurant Service • Shopping • Spring Breakers (3) • Too Busy • Too Commercial • Touristy Stuff • Traffic (2) • Transportation Within Island • Wealth • Weather • Windy (4) 	<ul style="list-style-type: none"> • Crowded (11) • Customer Service In Most Places • Drinking On Beach • Drinking Teens • Drive To SPI From Airport HRL • Gas Prices • Grocery Stores • High Prices (8) • Hot (3) • Hotels (2) • Lack Of Grocery Stores • No Drinking On Beach (2) • No Parking (2) • Noise • Not Enough Beach • Not Enough Convenience Stores • Police (2) • Poor Signs • Restaurants • Seaweed (6) • Service At Restaurants • Too Far From Apartment 	<ul style="list-style-type: none"> • Crowds Of People (3) • Hotel Service • Lack Of Quality Hotels • Lack Of Transportation • Long Line At Beach Toilets • Mango's Restaurant • No Attractions For Teenagers • No Doughnut Shop • No Museums On SPI • No Shows On Beach • Not Enough Churches • Over Priced On Gifts • People (2) • Price • Service At La Jaiba Resort • Shuttle Service From Airport • Some People • Standing In Line (Water) • Too Hot • Waiting In Line (2) • Water Park Not Complete (2) 	<ul style="list-style-type: none"> Availability of transportation Cost of taxi Cost of transportation Ferry Food Having to pay a taxi Inconvenience of broken bridge Lack of food Lack of shops & open attractions Lack of transportation Pay for taxi Shuttle (3) Shuttle didn't stop (2) Shuttle wait Stupid shuttles Taxi ride Taxi shuttle Taxis (3) The long wait to get across (3) Time lapse to get there Transportation (13) Transportation charges Transportation problem Transportation when we got across Transportation - shuttle Travel issues Wait for ferry Wait time (2) Waiting for transportation

In all similar studies the two responses that are listed most often for this question are "traffic" and "weather". While weather can not be changed it is important to look at traffic issues and the overall issue of carrying capacity. The winter and spring responses reflect a negative perception of the spring break crowds. A consistent theme in the responses year round is the desire for improved amenities on the island including shopping, dining, entertainment and lodging. The fall responses are skewed by the frustration caused by the closed causeway.

Summary of Intercept Interview Findings and Responses

15. Are you planning to visit South Padre Island in the future?

	Winter '01	Spring '01	Summer '01	Fall '01
Yes	93.88%	80.00%	65.71%	78.79%
No	6.12%	20.00%	34.29%	21.21%

If yes, what month(s) would you plan to visit?

(Circle the number of each month mentioned.)

	Winter '01	Spring '01	Summer '01	Fall '01
Jan	43.64%	0.00%	0.00%	3.85%
Feb	32.73%	0.00%	0.00%	11.54%
Mar	25.45%	20.00%	8.70%	26.92%
Apr	18.18%	16.00%	8.70%	7.69%
May	10.91%	16.00%	8.70%	3.85%
Jun	5.45%	14.00%	8.70%	11.54%
Jul	9.09%	30.00%	47.83%	0.00%
Aug	9.09%	18.00%	13.04%	7.69%
Sep	7.27%	6.00%	8.70%	26.92%
Oct	9.09%	0.00%	0.00%	3.85%
Nov	9.09%	2.00%	0.00%	3.85%
Dec	9.09%	0.00%	4.35%	23.08%

When asked if they were planning a repeat visit to South Padre the winter Texans were most loyal to the island with 93.88% planning to return and the winter months are the primary time for those repeat trips. Spring and fall visitors reported favorably that 79-80% will return to South Padre. Spring visitors prefer to return in the warm months (March – September) while fall visitors prefer the spring and fall months with some interest in the summer months. Of some concern is the lower percentage of repeat visitation (65.71%) planned among the summer visitors. In looking at the “dislikes” listed by the summer visitors in response to question # 14 we see that there were many issues with the overall quality of the amenities on the island that raised the most concerns. The summer visitors definitely prefer the warm months for their visits.

Summary of Intercept Interview Findings and Responses

DEMOGRAPHICS

The demographic data reported here is consistent with the visitation patterns for the seasons of the year at South Padre. Additionally the data matches the demographics of what we typically find at coastal destinations.

16. What is your age?

	Winter '01	Spring '01	Summer '01	Fall '01
Age Range	31 to 77	18 to 65	18 to 70	21 to 57
Average Age	54.31	35.76	38.85	32.46

17. Are you? (male or female)

	Fall '01	Winter '01	Spring '01	Summer '01
Male	55.55%	64.71%	63.41%	41.67%
Female	44.45%	35.29%	36.59%	58.33%

Summary of Intercept Interview Findings and Responses

18. What is your occupation?

Winter 2001

- Assembly
- Barber
- Business Owner
- Clerical
- Construction
- CPA
- Engineer
- Fisherman
- **Homemaker (2)**
- Insurance
- Journalist
- Librarian
- Manager Of Car Dealership
- Manager Of Gas Company
- Market Research
- Marketing Director
- Mutual Fund Manager
- Navy Officer
- Project Manager / Construction
- Retail
- Retail Buyer
- **Retired (27)**
- **Teacher (2)**
- Telecom Engineer
- X Ray Tech

Spring 2001

- Auto Detailer
- College Professor
- Commercial Director
- Contractor
- CPA
- **Customer Service (2)**
- Electrical Contractor
- International Purchasing
- Lawyer
- Librarian
- **Manager (6)**
- Nurse
- Physical Therapist
- **Retired (2)**
- **Sales And Marketing (2)**
- Self Employed
- Student
- Supervisor
- **Teacher (3)**
- Uni-Track
- **Waiter / Waitress (2)**

Summer 2001

- Accountant
- Business
- Business consultant
- Business owner
- Car salesman
- CEO of Computer Company
- Chef
- Construction owner
- Construction worker
- Corporate Executive
- CPA
- Director of Sales
- **Homemaker (2)**
- Insurance company
- Jobless
- Marketing consultant-computers
- Medical supply salesman
- Military
- **Nurse (2)**
- Nurse Asst.
- Painter
- Plant worker
- Professional baseball player
- **Retired (2)**
- **Student (2)**
- **Teacher (3)**

Summary of Intercept Interview Findings and Responses

Fall 2001

- Air Force
- Business Manager
- Cashier
- Clerk
- Construction Foreman
- Controller
- CPA
- Fashion Designer
- Grocery stocker
- **Homemaker (4)**
- Investment Advisor
- Makeup Artist
- Market Consultant
- Marketing
- Medical Asst.
- Not employed
- Office Manager
- **Operator (2)**
- Paramedic
- Police Officer
- Programmer
- Retail
- RN
- Sales
- Sales & Advertising
- Sales Engineer
- Sales Rep
- **Secretary (3)**
- Security
- Service Consultant
- Sr. VP Networking
- Stockbroker
- **Student (2)**
- **Teacher (3)**
- Travel Agent
- Truck Driver
- US Air Force
- Waitress

Winter 2001 Intercept Interview Findings and Responses

Methodology

Intercept interviews were conducted during the period January - February 2001 as part of the overall tourism market research study being conducted for the South Padre Island Convention and Visitors Bureau. The purpose of these interviews was to further document visitor perceptions of those who are already traveling in the South Padre Island and Port Isabel area.

The methodology for these interviews involves the careful selection of sites throughout South Padre Island where travelers can be intercepted and interviewed. A standard questionnaire was used in the interviews.

A few interviews were conducted at each location on several different days of the week over a two-month period. The following locations were used to conduct the interviews.

- Convention Centre
- Laguna Madre Nature Trail
- Bahia Mar Resort
- Radisson Resort
- Sheraton Resort
- Saida Towers
- Suntide Resort
- Isla Blanca Park
- Sea Turtle Inc.

The findings and responses from the 53 interviews are found in this section of the report.

Winter 2001 Intercept Interview Findings and Responses

N = 53

1. Location used for this interview? Top TWO responses in bold.

Hotel	48.89%
Condominium	20.00%
No Response	18.18%
Attraction	15.56%
Beach / Park	8.89%
Restaurant	4.44%
Motel	2.22%
Inn	0.00%
Bed & breakfast	0.00%

2. What is your home zip code?

Texas - 12 (22.64%)	Kalamazoo	Colorado - 1 (1.89%)
Arlington	Livonia	Denver
Brownsville	Martin	Kansas - 1 (1.89%)
Harlingen	Rockford	Leavenworth
Houston	Minnesota - 4 (7.55%)	Kentucky - 1 (1.89%)
Jourdanton	Fairmont	Mayfield
Klein	Grand Rapids	Missouri - 1 (1.89%)
Lewisville	La Porte	Saint Peters
Livingston	Wyoming	North Dakota - 1 (1.89%)
Mc Allen	Iowa - 3 (5.66%)	Cando
Plano	Alpha	New Jersey - 1 (1.89%)
San Antonio	Denver	Oakland
San Benito	Ottumwa	New Mexico - 1 (1.89%)
Illinois - 5 (9.43%)	Canada - 3 (5.66%)	Albuquerque
Auburn	City Not Given	New York - 1 (1.89%)
Coal Valley	City Not Given	Cortlandt Manor
Harvard (2)	Alberta	Ohio - 1 (1.89%)
City Not Given	Indiana - 2 (3.77%)	Mc Clure
Maryland - 5 (9.43%)	Indianapolis	Oklahoma - 1 (1.89%)
Columbia	Mc Cordsville	Newalla
Crownsville (2)	Alaska - 1 (1.89%)	South Carolina - 1 (1.89%)
West Friendship	Homer	Aiken
City Not Given	California - 1 (1.89%)	Wisconsin - 1 (1.89%)
Michigan - 4 (7.55%)	Murrieta	Monroe
		United Kingdom - 1 (1.89%)
		City Not Given

Winter 2001 Intercept Interview Findings and Responses

2a. Do you own property on South Padre Island?

Yes	4.65%
No	95.35%
No Response	21.82%

3. How many nights are you spending in South Padre Island this trip?

Average number of nights: 15.39

Top responses were 0, 2, and 30 nights, each representing 14.81% of the people that responded to this question.

4. What is the name of the lodging property you're staying in for this visit? Top FOUR responses in bold.

Bahia Mar (9)

Day Trip

Econo RV Park

Econolodge

Florence

Gulf Point

Gulf View

Holiday Inn

Inverness (2)

Mission - El Dorado Acres

Padre Island RV Park

Radisson (5)

RV

Seabreeze

Sheraton (5)

Town Of Donna

Winter 2001 Intercept Interview Findings and Responses

5. Including you, how many people are in your party?

- Adults: Typical response = 2.
Average number of adults = 2.54.
Percentage of visitors traveling with adults only = 77.78%.
- Children: Typical response = 2 or 3.
Average number of children for those traveling with children = 2.25.
Percentage of visitors traveling with children = 22.22%

6. How would you describe the people with you today? Top THREE responses in bold.

Family	87.50%
Friends	7.50%
Meeting / Convention Group	5.00%
Social / Fraternal Group	0.00%
Church Group	0.00%
Other (specify)	0.00%

Other:

There were no responses for "Other".

7. What made you choose South Padre Island for your vacation / getaway?

- AAA Article
- **Beach (2)**
- Beautiful Place
- **Been Before / Past Visits (5)**
- Birding
- Close By - Short Drive
- Conference
- Convenient Home In Arlington
- **Family (2)**
- Florida / Yuma Arizona & Here
- **Friends (3)**
- Had To See It
- Heard From Friend
- Insurance Meeting
- Never Been Here
- Nice, Quiet, Not Spring Break
- **Reasonable Prices / Inexpensive (2)**
- Some Place To Relax
- **South (2)**
- The Weather Map
- Tired Of Going To Hawaii
- Too Cold In Alabama
- Too Many Old People In Florida
- Tour Books
- Traveling US West To East
- Tropical Location In US
- Vacation - Originally From Here
- Wanted Warm USA Trip
- **Warmth / Weather / Climate (8)**
- Wife Knew South Padre

Winter 2001 Intercept Interview Findings and Responses

8. How many months in advance did you make your reservations / plans for this trip?

Shortest planning period: 0 Months
Longest planning period: 12 Months
Average planning period: 5.53 Months

9. Have you ever traveled to South Padre Island before this trip?

Yes 51.85%
No 48.15%
No Response 1.82%

10. Please name the months in which you've visited before. Top FOUR responses in bold.

January 36.36%
February 21.82%
March 7.27%
April 9.09%
May 7.27%
June 5.45%
July 10.91%
August 5.45%
September 3.64%
October 3.64%
November 5.45%
December 7.27%
No Response 47.27%

Winter 2001 Intercept Interview Findings and Responses

11. What was the main purpose of this visit to South Padre Island? Top FOUR responses in bold.

Vacation / getaway	60.42%
Visit friends / relatives	10.42%
General relaxation	8.33%
Get away from cold / north	4.17%
Birding	2.08%
Meeting / convention	2.08%
Business	2.08%
Reunion	2.08%
Fishing / boating	2.08%
Outdoor recreation day trip	2.08%
Overnight as part of a longer trip	2.08%
Other (specify)	2.08%
Relocation	0.00%
Day trip	0.00%
Attend a festival	0.00%
Nature studies	0.00%

"Other" responses include:

- Beach
- Ocean
- Relax
- See everything
- Winter Break

Winter 2001 Intercept Interview Findings and Responses

12. Where did you find the information you needed to plan a trip to South Padre Island? (Circle all that apply). Top FIVE responses in bold.

Recommendation – Friend / family	29.09%
Already knew / Been there before	20.00%
Other (please specify)	14.55%
Brochures – South Padre Island Visitor Guide	14.55%
Internet – South Padre Island web site	10.91%
Internet – Texas Tourism web site	9.09%
Magazines – Other (specify)	5.45%
Information sent by convention planer	3.64%
Magazines – Southern Living	3.64%
Welcome Center – South Padre Island Visitors Center	3.64%
Guides – AAA Tour Guides	3.64%
Magazines – Mid West Living	1.82%
Magazines – National Geographic	1.82%
Magazines – Woman’s Day	1.82%
Newspapers – Newspaper travel features	1.82%
Guides – Texas State Travel Guide	1.82%
Magazines – Texas Highways	0.00%
Magazines – Friendly Exchange	0.00%
Magazines – Endless Vacation	0.00%
Magazines – Reader’s Digest	0.00%
Magazines – Better Homes & Gardens	0.00%
Magazines – Country Living	0.00%
Magazines – Country America	0.00%
Welcome Center – Texas Welcome Center (I-35)	0.00%
Welcome Center – Texas Welcome Center (I-30)	0.00%
Welcome Center – Texas Welcome Center (I-10)	0.00%
Welcome Center – Texas Welcome Center (I-37)	0.00%
Guides – Fodor’s Tour Guides	0.00%

Winter 2001 Intercept Interview Findings and Responses

13. As I read the following list of activities, please tell me if any member of your travel party has or will do these on this trip. (Circle all that apply). Top FIVE responses in bold.

Sunbathing / beach	74.55%
Shopping	60.00%
Driving / sightseeing	30.91%
Other (specify)	27.27%
Birding / wildlife	23.64%
Golf	16.36%
Fishing	14.55%
Boat tours: dolphin / nature	12.73%
Visit a historic site	9.09%
Visit a museum	7.27%
Beach sport rental	7.27%
Biking	5.45%
Camping	3.64%
Business	3.64%
Boat rentals	3.64%
Boating	3.64%
Boat tours: fishing	3.64%
Attend a festival	1.82%
Meeting / seminar	0.00%
Windsurfing / surfing	0.00%

Other:

- BOOGIE BOARDING
- DINING / EATING (2)
- METAL DETECTOR
- **MEXICO (6)**
- MOTOR BIKES
- NO CASINO BOAT
- OWN THEIR SCOOTER
- READ / PUZZLES
- WALKING / RUNNING

Winter 2001 Intercept Interview Findings and Responses

14. When you think about South Padre Island what words or images first come to mind?

- Bahia Mar
- **Beach (11)**
- **Beautiful (2)**
- **Birds (2)**
- Boogey Boarding
- Calmness
- Coast
- Condos
- Daytona Beach Shores
- Eating
- Fishing
- **Friendly (2)**
- Golf
- Gorgeous
- **Gulf (2)**
- Heaven
- Insects
- **Ocean (5)**
- Ocean Breeze
- Palm Trees
- Parasailing
- **Peaceful (2)**
- Quiet
- **Relaxing (2)**
- Rest
- **Sand (3)**
- **Sand Dunes (2)**
- Seagulls
- Small Town Atmosphere
- Spring Break
- **Sunshine (3)**
- Tranquil
- Tropical Climate
- Unspoiled
- Vacation
- **Warm Weather (7)**
- **Water (3)**
- Wonderful People

Name any specific attractions / restaurants / etc. that you've particularly enjoyed on South Padre Island: (based on 15 respondents)

- Amber Jacks
- Aquarium
- **Beach (2)**
- **Black Beards (2)**
- Dolphin Watch Boat
- Enjoyed Slow Pace
- Fireworks Show (July)
- **Fishing (2)**
- **Lantern Grill (3)**
- **Louies Backyard (3)**
- Love Everything
- Mexican
- Nature
- Putt Putt Golf
- Restaurants
- River / Go Carts
- **Sea Ranch (3)**
- Seafood
- Walking On Beach

Winter 2001 Intercept Interview Findings and Responses

15. What mode of transportation did you use to travel to South Padre Island?

Automobile 66.67%
 Fly / drive 25.93%
 Other (specify) 7.41%
 No Response 1.82%

If fly / drive, which airport?

- BROWNSVILLE (2)
- BROWNSVILLE / SPI (2)
- HARLINGEN (7)
- HOUSTON
- NAS CORPUS CHRISTI
- SAN ANTONIO

Other:

- RV (4)

16. Please estimate how much you will spend during this trip to South Padre Island?

Area	Highest amount	Lowest amount	Average amount
Lodging	\$1900.00	\$30.00	\$750.78
Food/meals	\$1000.00	\$10.00	\$287.62
Attractions/amusements	\$200.00	\$4.00	\$83.29
Shopping	\$500.00	\$5.00	\$147.76
Trans., fuel, airfare, etc.	\$1000.00	\$5.00	\$271.48
TOTAL	\$2950.00	\$375.00	\$1459.64

17. Overall, on a 5-point scale (where 5 is Excellent, 3 is Average, and 1 is Poor), how would you rate your visit to South Padre Island?

5 (Excellent)	55.10%
4	28.57%
3 (Average)	14.29%
2	2.04%
1 (Poor)	0.00%
No Response	10.91%

Winter 2001 Intercept Interview Findings and Responses

18. Following is a list of attractions & events offered in South Padre Island. As I read the list, first identify those that you visited & rate from 1 to 5, (1=poor, 3=average, & 5=excellent). Second, identify those you heard of & didn't visit, and then identify those you have never heard of.

Attractions	Visited	Rating	Heard of Didn't Visit	Never Heard of
Andy Bowie Park	27.50%	4.50	7.50%	5.00%
Edwin K Atwood Park	27.50%	4.22	7.50%	0.00%
Isla Blanca Park	30.00%	4.40	7.50%	5.00%
Blanca Park	17.50%	4.33	5.00%	5.00%
"The Wave" Free Shuttle System	15.00%	4.40	22.50%	0.00%
Island Equestrian Center	5.00%	5.00	12.50%	5.00%
Laguna Atascosa National Wildlife Refuge	12.50%	4.60	0.00%	7.50%
Laguna Madre Nature Trail	10.00%	4.50	2.50%	5.00%
Whaling Wall	12.50%	3.80	2.50%	0.00%
Univ. of Texas-Pan American Coastal Studies Lab.	5.00%	3.50	2.50%	5.00%
Ben's Fun & Sun Kids Park	2.50%	5.00	0.00%	5.00%
Three Flags over Padre	0.00%	NR	2.50%	5.00%
Sea Turtle, Inc. – Home of the "Turtle Lady"	25.00%	4.67	12.50%	0.00%
Movie Theater	20.00%	4.17	7.50%	0.00%
Mall	17.50%	3.00	5.00%	0.00%
Schlitterbahn Beach Waterpark	0.00%	NR	0.00%	5.00%
Area / Regional Attractions & Sites				
Confederate Air Force / Rio Grande Wing-Brownsville	5.00%	5.00	2.50%	2.50%
Port Isabel Lighthouse	30.00%	4.63	5.00%	0.00%
Port Isabel Historical Museum	22.50%	4.63	10.00%	0.00%
Matamoros Mexico	2.50%	4.80	7.50%	0.00%
Gladys Porter Zoo (Brownsville)	22.50%	4.89	5.00%	0.00%
Fort Brown (Brownsville)	5.00%	4.00	0.00%	2.50%
Other sites in Rio Grande Valley (specify)	7.50%	4.00	0.00%	0.00%
Events				
Fishing Tournaments (specify)	0.00%	NR	0.00%	0.00%
Spring Break	0.00%	NR	0.00%	0.00%
Other (specify)	0.00%	NR	0.00%	0.00%
Club Padre (Winter Texans)	0.00%	NR	0.00%	0.00%

Other sites in Rio Grand Valley (specify):

- BEACHES
- BIRDING (2)
- CONVENTION CENTRE (2)
- GOLF
- NATURE

Other (specify):

- CHAPEL OF SEA

Winter 2001 Intercept Interview Findings and Responses

19. Which of the following would you participate in if offered in South Padre Island? (Circle the number of all that interest you).

Top FIVE responses in bold.

Mexico shopping shuttle	34.55%
Aquarium	34.55%
Fine dining restaurant	34.55%
Wildlife festival	27.27%
Rio Grande Valley history & heritage museum	27.27%
Outlet mall	25.45%
Golf resort	25.45%
Botanical Garden	25.45%
Arts & crafts festival	25.45%
Man-made lagoon where you can swim with tropical fish	25.45%
Guided birding and nature excursions	23.64%
Water park	20.00%
Other (specify)	20.00%
Biking / cycling tours	9.09%
Water sports learning center (instructions)	9.09%

"Other" responses include:

- ANOTHER BRIDGE
- **AVIARY CENTER (5)**
- CONCERTS
- DON'T BUILD UP TOO MUCH
- NO WATERPARK
- NOTHING TO BRING MORE PEOPLE
- SHOPPING MALL

Winter 2001 Intercept Interview Findings and Responses

20. What did you like or dislike most about South Padre Island?

Likes Of Respondents

- Access To Water / Sewage / RV
- All
- **Atmosphere (2)**
- Attractions
- **Beaches (14)**
- **Beauty (2)**
- Clean Now
- Coast
- **Convenience (2)**
- Driving Thru The Dunes
- **Fishing (3)**
- **Food (2)**
- Friends
- Golf
- Good For Jogging
- Great Place
- Maps
- Mexico
- Natural Beauty
- Not Build Up / Undeveloped
- Not Crowded
- **Ocean (2)**
- **People (Nice / Wonderful) (3)**
- Prices
- Quiet
- Relaxing
- Resorts
- **Restaurants (4)**
- **Shopping (3)**
- Sightseeing
- Spanish
- Street Signs
- Sun
- Tranquil
- Tropical
- Variety
- Weather
- **Weather / Warm (8)**

Dislikes of Respondents

- Beach
- Cloudy Days
- Commercialism
- Cool Weather
- Crowded Campground - Noisy
- **Crowds (2)**
- Development
- Expensive
- Fishing Charter Service
- Inaccessible When Jelly Fish Come In
- Need Children Activities
- No Catholic Church
- No Hotels
- Not Enough Entertainment
- Not Enough History
- Not Good Shopping
- **Nothing (3)**
- Oil / Tar Beach
- Overbuilding (6 New Motels)
- Portuguese Man Of War
- Pulled Over For Speeding
- Rain / Cold
- Restaurant Service
- Shopping
- **Spring Breakers (3)**
- Too Busy
- Too Commercial
- Touristy Stuff
- **Traffic (2)**
- Transportation Within Island
- Wealth
- Weather
- **Windy (4)**

Winter 2001 Intercept Interview Findings and Responses

21. Are you planning to visit South Padre Island in the future?

Yes	93.88%
No	6.12%
No Response	10.91%

If Yes, what month(s) do you plan to visit?
(Circle the number of each month mentioned)

January	43.64%
February	32.73%
March	25.45%
April	18.18%
May	10.91%
June	5.45%
July	9.09%
August	9.09%
September	7.27%
October	9.09%
November	9.09%
December	9.09%
No Response	20.00%

22. Education? (Circle one)

Grade school	2.63%
Technical school	2.63%
Some high school	0.00%
High school graduate	39.47%
Graduate school	28.95%
Some college	10.53%
Other	15.79%

23. What is your age?

Ages range from 31 to 77. Average = 54.31.

24. Are you? (Male or female)

Males comprised 55.55% of respondents; females 44.45%.

Winter 2001 Intercept Interview Findings and Responses

25. What is your occupation?

- Assembly
- Barber
- Business Owner
- Clerical
- Construction
- CPA
- Engineer
- Fisherman
- **Homemaker (2)**
- Insurance
- Journalist
- Librarian
- Manager Of Car Dealership
- Manager Of Gas Company
- Market Research
- Marketing Director
- Mutual Fund Manager
- Navy Officer
- Project Manager / Construction
- Retail
- Retail Buyer
- **Retired (27)**
- **Teacher (2)**
- Telecom Engineer
- X Ray Tech

26. What category is closest to your total family income? (Circle one)

Less than \$20,000	0.00%
\$20,000 - \$39,999	28.57%
\$40,000 - \$59,999	32.14%
\$60,000 - \$79,999	14.29%
\$80,000 - \$99,999	10.71%
\$100,000 +	14.29%
No response	67.50%

Spring 2001 Intercept Interview Findings and Responses

Methodology

Intercept interviews were conducted during Easter weekend 2001 as part of the overall tourism market research study being conducted for the South Padre Island Convention and Visitors Bureau. The purpose of these interviews was to further document visitor perceptions of those who are already traveling in the South Padre Island area.

The methodology for these interviews involves the careful selection of sites around South Padre Island and Port Isabel where travelers can be intercepted and interviewed. A standard questionnaire was used in the interviews.

A few interviews were conducted at each location on several different days of the holiday weekend. The following locations were used to conduct the interviews.

- Convention Centre
- Laguna Madre Nature Trail
- Bahia Mar Resort
- Radisson Resort
- Sheraton Resort
- Saida Towers
- Suntide Resort
- Isla Blanca Park
- Sea Turtle Inc.
- Local Restaurants

The findings and responses from the 51 interviews are found in this section of the report.

Spring 2001 Intercept Interview Findings and Responses

N = 51

Location used for this interview? Top THREE responses in bold.

Restaurant	24.00%
Beach / Park	22.00%
Condominium	18.00%
Hotel	14.00%
Motel	10.00%
Inn	4.00%
Bed & breakfast	4.00%
Attraction	4.00%
No Response	0.00%

1. What is your home zip code?

- Texas - 25 (65.79%)**
 - Bastrop
 - Bonner
 - Brownsville
- Corpus Christi 16 (42.08%)**
 - Houston
 - Nuevo Laredo (2)
- San Antonio - 3 (7.89%)**
- Mexico (City Not Given) – 4 (10.53%)**
 - Mexico (4)
- New York - 3 (7.89%)**
 - Maybrook
 - Montgomery
 - Yonkers
- Michigan - 2 (5.26%)**
 - Muskegon (2)
- Country Not Given - 1 (2.63%)**
 - Los Mochis Sinaloa
- Florida - 1 (2.63%)**
 - Orlando
- Louisiana - 1 (2.63%)**
 - Pierre Part
- Oklahoma - 1 (2.63%)**
 - Oklahoma City

Spring 2001 Intercept Interview Findings and Responses

1a. Do you own property on South Padre Island?

Yes	0.00%
No	100.00%
No Response	18.00%

2. How many nights are you spending in South Padre Island this trip?

Average number of nights: 2.56

Top responses were:

1 Night	20.83%
2 Nights	29.17%
3 Nights	27.08%

Percentages based on the number of people that answered question #2.

3. Including you, how many people are in your party?

Adults: Typical response = 2.

Average number of adults = 2.20.

Percentage of visitors traveling with adults only = 67.35%.

Children: Typical response = 1 to 4.

Average number of children for those traveling with children = 2.44.

Percentage of visitors traveling with children = 32.65%

Spring 2001 Intercept Interview Findings and Responses

4. Have you ever traveled to South Padre Island before this trip?

Yes	50.00%
No	50.00%
No Response	0.00%

**5. Please name the months in which you've visited before.
Top FOUR responses in bold.**

January	0.00%
February	0.00%
March	22.00%
April	8.00%
May	16.00%
June	12.00%
July	24.00%
August	8.00%
September	0.00%
October	0.00%
November	0.00%
December	0.00%
No Response	50.00%

**6. What was the main purpose of this visit to South Padre Island?
Top TWO responses in bold.**

Vacation / getaway	52.50%
General relaxation	17.50%
Visit friends / relatives	5.00%
Business	5.00%
Day trip	5.00%
Overnight as part of a longer trip	5.00%
Meeting / convention	2.50%
Reunion	2.50%
Fishing / boating	2.50%
Other (specify)	2.50%
Birding	0.00%
Relocation	0.00%
Attend a festival	0.00%
Nature studies	0.00%
Outdoor recreation day trip	0.00%
Get away from cold / North	0.00%

"Other" responses included: "Clubbing"

Spring 2001 Intercept Interview Findings and Responses

7. Where did you find the information you needed to plan a trip to South Padre Island? (Circle all that apply).

Top FIVE responses in bold.

Recommendation – Friend / family	48.00%
Already Knew – Been there before	36.00%
Other – Other (specify)	14.00%
Internet – South Padre Island web site	14.00%
Internet – Texas Tourism web site	10.00%
Newspapers – Newspaper travel features	6.00%
Welcome Center – South Padre Island Visitors Center	6.00%
Brochures – South Padre Island Visitor Guide	4.00%
Guides – Texas State Travel Guide	4.00%
Info sent by convention planner	2.00%
Guides – AAA Tour Guides	2.00%
Magazines – (specify)	0.00%
Welcome Center – Texas Welcome Center (specify)	0.00%
Guides – Fodor’s Tour Guides	0.00%

Magazines Other (specify):

No responses were given for Magazines “Other”.

Other (specify):

- CC VISITORS CENTER
- CONVENTION
- FRIENDS FROM MONTERREY MEXICO HOUSE
- LIVE CLOSE BY
- PREVIOUS EXPERIENCE
- TEXAS MAP

Welcome Center – Texas Welcome Center (specify):

No responses were given for Welcome Center “Other”.

Spring 2001 Intercept Interview Findings and Responses

8. *As I read the following list of activities, please tell me if any member of your travel party has or will do these on this trip. (Circle all that apply).*

Top FIVE responses in bold.

Sunbathing / beach	60.00%
Shopping	40.00%
Driving / sightseeing	26.00%
Fishing	22.00%
Boat rentals	16.00%
Visit a museum	12.00%
Beach sport rental	12.00%
Boat tours: fishing	12.00%
Attend a festival	10.00%
Boat tours: dolphin / nature	10.00%
Other (specify)	10.00%
Golf	8.00%
Windsurfing / surfing	8.00%
Boating	6.00%
Business	4.00%
Visit a historic site	4.00%
Camping	2.00%
Biking	2.00%
Meeting / seminar	2.00%
Birding / wildlife	0.00%

Other:

- BARS
- BEACH
- CLUBBING
- EATING
- RESTAURANTS

Spring 2001 Intercept Interview Findings and Responses

9. Name any attractions / restaurants / etc. that you visited on South Padre Island and rate each (on a scale of 1 - 5):

Top FOUR responses (by percentage) in bold.

Attraction	Percentage	Average Rating
Beach	54.00%	3.93
BlackBeards	22.00%	3.82
Louies dance club / bar	14.00%	4.14
Sharky's	10.00%	3.40
Blue Waves	8.00%	4.50
Sea Ranch	6.00%	4.33
Amber Jacks	6.00%	4.33
Fishing	4.00%	4.00
Boating	4.00%	NR
Hotel	4.00%	2.50
Movies	4.00%	3.50
Water slide	4.00%	4.00
Lantern Grill	4.00%	3.00
Shops	4.00%	3.50
McDonalds	4.00%	2.00
Tour	2.00%	4.00
Charlies / club	2.00%	3.00
Little Golf Place	2.00%	4.00
Mall	2.00%	4.00
Rovans	2.00%	4.00
Airport	2.00%	5.00
Airport restaurant	2.00%	4.00
Putt Putt Golf	2.00%	4.00
Restaurants (general)	2.00%	2.00
Golf	2.00%	2.00
Dolphin boat tour	2.00%	4.00
Wave Runners	2.00%	3.00
Ocean kayaking	2.00%	5.00
Go carts	2.00%	5.00
Josephs	2.00%	4.00
Bike rentals	2.00%	5.00
Scampis	2.00%	3.00

Spring 2001 Intercept Interview Findings and Responses

10. What mode of transportation did you use to travel to South Padre Island?

Automobile 69.39%
 Fly / drive 28.57%
 Other (specify) 2.04%
 No Response 2.00%

If fly / drive, which airport?

- BROWNSVILLE (5)
- BROWNSVILLE SPI
- CC INTERNATIONAL (2)
- HARLINGTON AIRPORT
- HRL
- MC ALLEN
- VALLEY INTERNATIONAL AIRPORT

Other:

- BUS MOTORCOACH

11. Please estimate how much you will spend during this trip to South Padre Island?

Area	Highest amount	Lowest amount	Average amount
Lodging	\$625.00	\$65.00	\$256.03
Food/meals	\$600.00	\$20.00	\$159.62
Attractions/amusements	\$250.00	\$30.00	\$119.00
Shopping	\$1200.00	\$25.00	\$192.92
Trans., fuel, airfare, etc.	\$1500.00	\$5.00	\$254.63
TOTAL	\$2300.00	\$45.00	\$659.63

Spring 2001 Intercept Interview Findings and Responses

12. Overall, on a 5-point scale (where 5 is Excellent, 3 is Average, and 1 is Poor), how would you rate your visit to South Padre Island?

5 (Excellent)	20.41%
4	42.86%
3 (Average)	32.65%
2	4.08%
1 (Poor)	0.00%
No Response	2.00%

13. Which of the following would you participate in if offered in South Padre Island? (Circle the number of all that interest you).

Top FIVE responses in bold.

Water park	50.00%
Man-made lagoon where you can swim with tropical fish	38.00%
Outlet mall	36.00%
Fine dining restaurant	36.00%
Aquarium	30.00%
Mexico shopping shuttle	20.00%
Golf resort	16.00%
Botanical garden	16.00%
Water sports learning center (instructions)	16.00%
Guided birding and nature excursions	12.00%
Arts & crafts festival	10.00%
Biking / cycling tours	6.00%
Other (specify)	6.00%
Rio Grande Valley history & heritage museum	4.00%
Wildlife festival	0.00%

"Other" responses include:

- BARS
- CLUB LOUIES
- PUTT PUTT GOLF

Spring 2001 Intercept Interview Findings and Responses

14. What did you like or dislike most about South Padre Island?

Likes Of Respondents

- Activities
- **Atmosphere (3)**
- Bars
- **Beach (15)**
- Crowds
- Drinking
- **Everything (4)**
- **Fishing (3)**
- **Hotels (4)**
- Kyaking
- Lantern Grill
- Louies
- Movies
- **People (2)**
- Restaurants
- Shopping
- Sites
- Stores
- Sun
- Traffic
- Walking
- Water
- Water Slide
- Water Sports
- **Weather (3)**
- Women

Dislikes Of Respondents

- **Crowded (11)**
- Customer Service In Most Places
- Drinking On Beach
- Drinking Teens
- Drive To Spi From Airport Hri
- Gas Prices
- Grocery Stores
- **High Prices (8)**
- **Hot (3)**
- **Hotels (2)**
- Lack Of Grocery Stores
- Long Drives
- **No Drinking On Beach (2)**
- **No Parking (2)**
- Noise
- Not Enough Beach
- Not Enough Convenience Stores
- **Police (2)**
- Poor Signs
- Restaurants
- **Seaweed (6)**
- Service At Restaurants
- Too Far From Apartment
- **Traffic (6)**

Spring 2001 Intercept Interview Findings and Responses

15. Are you planning to visit South Padre Island in the future?

Yes 80.00%
No 20.00%
No Response 10.00%

If Yes, what month(s) do you plan to visit? (Circle the number of each month mentioned). Top THREE responses in bold.

January 0.00%
February 0.00%
March 20.00%
April 16.00%
May 16.00%
June 14.00%
July 30.00%
August 18.00%
September 6.00%
October 0.00%
November 2.00%
December 0.00%
No Response 36.00%

16. What is your age?

Ages range from 18 to 65. Average = 35.76.

17. Are you? (Male or female)

Males comprised 64.71% of respondents; females 35.29%.

Spring 2001 Intercept Interview Findings and Responses

18. What is your occupation?

- Auto Detailer
- College Professor
- Commercial Director
- Contractor
- CPA
- Customer Service (2)
- Electrical Contractor
- International Purchasing
- Lawyer
- Librarian
- Manager (6)
- Nurse
- Physical Therapist
- Retired (2)
- Sales And Marketing (2)
- Self Employed
- Student
- Supervisor
- Teacher (3)
- Uni-Track
- Waiter / Waitress (2)

Summer 2001 Intercept Interview Findings and Responses

N = 51

Location used for this interview? Top THREE responses in bold.

Condominium	22.00%
Restaurant	20.00%
Hotel	14.00%
Motel	12.00%
Bed & breakfast	10.00%
Beach / Park	8.00%
Attraction	8.00%
Inn	2.00%
No Response	2.00%

1. What is your home zip code?

Texas - 24 (88.89%)

Aransas Pass

Austin

Brownsville

Corpus Christi (3)

Dallas (2)

El Paso

Ft. Worth (2)

Houston (3)

Laredo

Lewisville

McAllen

Rockport (2)

San Antonio (2)

San Marcos

Tyler

Victoria

Colorado - 1 (3.70%)

No city given

Florida - 1 (3.70)

Avon Park

Mexico - 1 (3.70%)

Monterrey

Summer 2001 Intercept Interview Findings and Responses

1a. Do you own property on South Padre Island?

Yes	13.89%
No	86.11%
No Response	28.00%

2. How many nights are you spending in South Padre Island this trip?

Average number of nights: 4.65

Top responses were:

2 Night	19.57%
3 Nights	32.61%
4 Nights	17.39%

Percentages based on the number of people that answered question #2.

3. Including you, how many people are in your party?

Adults: Typical response = 2.

Average number of adults = 2.60.

Percentage of visitors traveling with adults only = 50.00%.

Children: Typical response = 2 to 3.

Average number of children for those traveling with children = 3.00.

Percentage of visitors traveling with children = 50.00%

Summer 2001 Intercept Interview Findings and Responses

4. Have you ever traveled to South Padre Island before this trip?

Yes	44.00%
No	56.00%
No Response	0.00%

4a. If yes, how many times have you visited South Padre Island?

Average number of times: 3.57

Top responses were:

2 times	33.33%
1 times	28.57%

Percentages based on the number of people that answered question #4.

5. Please name the months in which you've visited before.

Top FOUR responses in bold.

January	4.55%
February	4.55%
March	18.18%
April	0.00%
May	13.64%
June	36.36%
July	54.55%
August	22.73%
September	9.09%
October	9.09%
November	0.00%
December	0.00%
No Response	56.00%

Summer 2001 Intercept Interview Findings and Responses

6. What was the main purpose of this visit to South Padre Island?

Top TWO responses in bold.

Vacation / getaway	44.00%
General relaxation	18.00%
Other (specify)	8.00%
Overnight as part of a longer trip	5.00%
Visit friends / relatives	4.00%
Business	4.00%
Day trip	4.00%
Fishing / boating	4.00%
Birding	4.00%
Reunion	2.50%
Meeting / convention	2.00%
Relocation	2.00%
Attend a festival	2.00%
Nature studies	2.00%
Get away from cold / North	2.00%
Outdoor recreation day trip	0.00%

“Other” responses included:

- Art Festival
- Honeymoon
- Attractions

Summer 2001 Intercept Interview Findings and Responses

7. Where did you find the information you needed to plan a trip to South Padre Island? (Circle all that apply).

Top FIVE responses in bold.

Recommendation – Friend / family	42.00%
Internet – South Padre Island web site	36.00%
Already Knew – Been there before	26.00%
Other – Other (specify)	12.00%
Magazines – (specify)	8.00%
Brochures – South Padre Island Visitor Guide	6.00%
Guides – Texas State Travel Guide	6.00%
Newspapers – Newspaper travel features	4.00%
Welcome Center – South Padre Island Visitors Center	4.00%
Info sent by convention planner	4.00%
Guides – AAA Tour Guides	4.00%
Internet – Texas Tourism web site	2.00%
Welcome Center – Texas Welcome Center (specify)	0.00%
Guides – Fodor’s Tour Guides	0.00%

Magazines Other (specify):

No responses were given for Magazines “Other”.

Other (specify):

- Attend an Art Show

Welcome Center – Texas Welcome Center (specify):

No responses were given for Welcome Center “Other”.

Summer 2001 Intercept Interview Findings and Responses

8. As I read the following list of activities, please tell me if any member of your travel party has or will do these on this trip. (Circle all that apply).

Top FIVE responses in bold.

Sunbathing / beach	60.00%
Shopping	24.00%
Fishing	18.00%
Beach sport rental	18.00%
Golf	18.00%
Boat rentals	14.00%
Boat tours: dolphin / nature	14.00%
Other (specify)	14.00%
Boating	10.00%
Attend a festival	8.00%
Camping	8.00%
Visit a museum	6.00%
Boat tours: fishing	6.00%
Biking	6.00%
Birding / wildlife	6.00%
Business	4.00%
Visit a historic site	4.00%
Meeting / seminar	4.00%
Driving / sightseeing	2.00%
Windsurfing / surfing	2.00%

Other:

- Art show
- Brownsville Bird Festival
- Honeymoon
- rides
- Water park (2)

Summer 2001 Intercept Interview Findings and Responses

9. Name any attractions / restaurants / etc. that you visited on South Padre Island and rate each (on a scale of 1 - 5):

Top FOUR responses (by percentage) in bold.

Attraction	Percentage	Average Rating
Beach	66.67%	4.59
Black Beard's	35.29%	4.11
Water Park	19.61%	3.50
Mangols	15.69%	3.75
Lantern Grill	11.76%	4.83
Louis Bar	9.80%	4.00
Go carts	5.88%	4.33
Bungee Jumping	5.88%	4.33
Sheraton	3.92%	3.50
Fireworks	3.92%	5.00
Rouans	3.92%	5.00
B & B	1.96%	5.00
Tom & Jerry's	1.96%	3.00
Coconuts	1.96%	4.00
Convention Center	1.96%	5.00
Dolphin Boat	1.96%	4.00
Fishing	1.96%	4.00
Airport transportation to SPI	1.96%	1.00
Sea Ranch	1.96%	3.00
Scampis	1.96%	4.00
McDonald	1.96%	2.00
Mexican Restaurant	1.96%	5.00
Micro Hotel	1.96%	5.00
No showers on Beach	1.96%	1.00
Nude beach	1.96%	5.00
Pirates	1.96%	5.00
Radisson	1.96%	4.00
restaurant	1.96%	4.00
La Jaiba	1.96%	1.00

Summer 2001 Intercept Interview Findings and Responses

10. What mode of transportation did you use to travel to South Padre Island?

Automobile	66.00%
Fly / drive	26.66%
Other (specify)	6.00%
No Response	2.00%

If fly / drive, which airport?

- **Brownsville (2)**
- CC International
- **Harlingen Airport (4)**

Other:

- Another Couple
- Bus
- Fly
- Motorcycle

11. Please estimate how much you will spend during this trip to South Padre Island?

Area	Highest amount	Lowest amount	Average amount
Trans., fuel, airfare, etc.	\$1,500.00	\$10.00	\$276.58
Shopping	\$1,000.00	\$50.00	\$298.08
Lodging	\$1,000.00	\$100.00	\$282.19
Food/meals	\$500.00	\$40.00	\$210.00
Attractions/amusements	\$500.00	\$40.00	\$153.18
TOTAL	\$4,500.00	\$90.00	\$940.00

Summer 2001 Intercept Interview Findings and Responses

12. Overall, on a 5-point scale (where 5 is Excellent, 3 is Average, and 1 is Poor), how would you rate your visit to South Padre Island?

5 (Excellent)	46.51%
4	34.88%
3 (Average)	13.95%
2	4.65%
1 (Poor)	0.00%
No Response	14.00%

13. Which of the following would you participate in if offered in South Padre Island? (Circle the number of all that interest you).

Top FOUR responses in bold.

Water park	36.36%
Outlet mall	20.45%
Golf resort	20.45%
Fine dining restaurant	18.18%
Man-made lagoon where you can swim with tropical fish	15.91%
Mexico shopping shuttle	15.91%
Wildlife festival	15.91%
Biking / cycling tours	13.64%
Botanical garden	11.36%
Arts & crafts festival	9.09%
Aquarium	6.82%
Water sports learning center (instructions)	6.82%
Guided birding and nature excursions	4.55%
Other (specify)	4.55%
Rio Grande Valley history & heritage museum	4.55%

"Other" responses include:

- Go Carts

Summer 2001 Intercept Interview Findings and Responses

14. What did you like or dislike most about South Padre Island?

Likes Of Respondents

- Atmosphere
- **Attractions (2)**
- B & B
- **Bars (2)**
- **Beach (16)**
- **Black Beards (3)**
- **Bungee Jump (3)**
- Convention center
- Everything
- **Fireworks (3)**
- Go carts
- Gold Courses
- Great restaurants
- Joseph's
- Lantern Grill
- Louis Restaurant
- Louis/fireworks
- More restaurants
- No men
- Nude beach
- Relaxed atmosphere
- **Restaurants (3)**
- Rouans Bakery
- Sand
- **Water Park (4)**
- Weather

Dislikes Of Respondents

- **Crowds Of People (3)**
- Hotel Service
- Lack Of Quality Hotels
- Lack Of Transportation
- Long Line At Beach Toilets
- Mango's Restaurant
- No Attractions For Teenagers
- No Doughnut Shop
- No Museums On SPI
- No Shows On Beach
- Not Enough Churches
- Over Priced On Gifts
- **People (2)**
- Price
- Service At La Jaiba Resort
- Shuttle Service From Airport
- Some People
- Standing In Line (Water)
- Too Hot
- **Waiting In Line (2)**
- **Water Park Not Complete (2)**

Summer 2001 Intercept Interview Findings and Responses

15. Are you planning to visit South Padre Island in the future?

Yes 65.71%
No 34.29%
No Response 29.41%

If Yes, what month(s) do you plan to visit? (Circle the number of each month mentioned).

Top TWO responses in bold.

January	0.00%
February	0.00%
March	8.70%
April	8.70%
May	8.70%
June	8.70%
July	47.83%
August	13.04%
September	8.70%
October	0.00%
November	0.00%
December	4.35%

16. What is your age?

Ages range from 18 to 70. Average = 38.85.

17. Are you? (Male or female)

Males comprised 63.41% of respondents; females 36.59%.

Summer 2001 Intercept Interview Findings and Responses

18. What is your occupation?

- Accountant
- Business
- Business consultant
- Business owner
- Car salesman
- CEO of Computer Company
- Chef
- Construction owner
- Construction worker
- Corporate Executive
- CPA
- Director of Sales
- **Homemaker (2)**
- Insurance company
- Jobless
- Marketing consultant-computers
- Medical supply salesman
- Military
- **Nurse (2)**
- Nurse Asst.
- Painter
- Plant worker
- Professional baseball player
- **Retired (2)**
- **Student (2)**
- **Teacher (3)**

Fall 2001 Intercept Interview Findings and Responses

N = 52

Location used for this interview?

Top FOUR responses in bold.

Bed & breakfast	17.31%
Attraction	11.54%
Hotel	11.54%
Restaurant	11.54%
Condominium	9.62%
Beach / Park	3.85%
Motel	3.85%
Inn	1.92%
No Response	28.85%

1. What is your home zip code?

Texas-15 (48.4%)

Bishop

Corpus Christi (7)

Deer Park

Harlingen

Houston (2)

Ingleside (2)

Los Indios

New Mexico-4 (12.9%)

Albuquerque

Cannon AFB (2)

San Antonio

California-2 (6.5%)

Beverly Hills

San Diego

Kansas-2 (6.5%)

Kansas City (2)

New York-2 (6.5%)

New York

Westbury

Pennsylvania-2 (6.5%)

Morristown

Trafford

Arkansas-1 (3.2%)

Little Rock

Colorado-1 (3.2%)

La Junta

Michigan-1 (3.2%)

Argyle

Oklahoma-1 (3.2%)

Tulsa

Fall 2001 Intercept Interview Findings and Responses

1a. Do you own property on South Padre Island?

Yes	2.94%
No	97.06%
No Response	34.62%

2. How many nights are you spending in South Padre Island this trip?

Average number of nights: 2.57

Top responses were:

1 Night	15.69%
2 Nights	39.22%
3 Nights	19.61%

Percentages based on the number of people that answered question #2.

3. Including you, how many people are in your party?

Adults: Typical response = 2.

Average number of adults = 2.17.

Percentage of visitors traveling with adults only = 30.00%.

Children: Typical response = 2 - 4.

Average number of children for those traveling with children = 2.53.

Percentage of visitors traveling with children = 70.00%

Fall 2001 Intercept Interview Findings and Responses

4. Have you ever traveled to South Padre Island before this trip?

Yes	50.00%
No	50.00%
No Response	3.85%

4a. If yes, how many times have you visited South Padre Island?

Average number of times: 3.57

Top responses were:

2 times	20.00%
1 times	20.00%

Percentages based on the number of people that answered question #4.

5. Please name the months in which you've visited before.

Top FOUR responses in bold.

January	9.38%
February	9.38%
March	43.75%
April	28.13%
May	15.63%
June	15.63%
July	21.88%
August	18.75%
September	25.00%
October	53.13%
November	31.25%
December	15.63%
No Response	38.46%

Fall 2001 Intercept Interview Findings and Responses

6. What was the main purpose of this visit to South Padre Island?

Top TWO responses in bold.

Vacation / getaway	30.00%
General relaxation	20.00%
Visit friends / relatives	14.00%
Business	12.00%
Day trip	6.00%
Other (specify)	4.00%
Fishing / boating	4.00%
Reunion	4.00%
Overnight as part of a longer trip	2.00%
Meeting / convention	2.00%
Outdoor recreation day trip	2.00%
Birding	0.00%
Relocation	0.00%
Attend a festival	0.00%
Nature studies	0.00%
Get away from cold / North	0.00%

“Other” responses included:

- Mexico
- Winter Resident

Fall 2001 Intercept Interview Findings and Responses

7. Where did you find the information you needed to plan a trip to South Padre Island? (Circle all that apply).

Top FOUR responses in bold.

Recommendation – Friend / family	40.82%
Already Knew – Been there before	20.41%
Internet – South Padre Island web site	12.24%
Info sent by convention planner	12.24%
Internet – Texas Tourism web site	10.20%
Newspapers – Newspaper travel features	6.12%
Brochures – South Padre Island Visitor Guide	4.08%
Guides – Texas State Travel Guide	4.08%
Magazines – (specify)	2.04%
Welcome Center – South Padre Island Visitors Center	2.04%
Welcome Center – Texas Welcome Center (specify)	2.04%
Other – Other (specify)	0.00%
Guides – AAA Tour Guides	0.00%
Guides – Fodor’s Tour Guides	0.00%

Magazines Other (specify):

No responses were given for Magazines “Other”.

Other (specify):

- Live There 3 Months a Year

Welcome Center – Texas Welcome Center (specify):

No responses were given for Welcome Center “Other”.

Fall 2001 Intercept Interview Findings and Responses

8. As I read the following list of activities, please tell me if any member of your travel party has or will do these on this trip. (Circle all that apply).

Top FIVE responses in bold.

Sunbathing/Beach	52.00%
Shopping	40.00%
Boat Tours: Dolphin/Nature	26.00%
Fishing	26.00%
Golf	20.00%
Visit a museum	18.00%
Boating	16.00%
Beach Sport Rental	12.00%
Boat Rentals	12.00%
Driving/Sightseeing	12.00%
Windsurfing/Surfing	12.00%
Attend a Festival	10.00%
Biking	10.00%
Boat Tours: Fishing	10.00%
Business	10.00%
Camping	10.00%
Visit a Historic Site	8.00%
Birding/Wildlife	6.00%
Meeting/Seminar	6.00%
Other	6.00%

Other:

- Nightlife
- Meet Pen Pal
- Eating

Fall 2001 Intercept Interview Findings and Responses

9. Name any attractions / restaurants / etc. that you visited on South Padre Island and rate each (on a scale of 1 - 5):

Top FOUR responses (by percentage) in bold.

Attraction	Percentage	Average Rating
Beach	53.85%	3.86
Blackbeard's	33.33%	3.85
Louis Backyard	17.95%	4.29
Mall	17.95%	3.71
Radisson	12.82%	3.80
Sheraton	10.26%	4.75
Condo	5.13%	3.50
Dolphin tour	5.13%	3.50
Golf course	5.13%	4.50
Zoo	5.13%	3.50
McDonald's	5.13%	1.50
Mexico Matamoras	2.56%	4.00
Movies	2.56%	4.00
Museum	2.56%	3.00
Restaurants	2.56%	3.00
Clubs	2.56%	5.00
Cloud 9	2.56%	4.00
Canals	2.56%	4.00
Boatride-Dolphins	2.56%	5.00
Boating	2.56%	3.00
Transportation	2.56%	1.00
Hotels	2.56%	4.00

10. What mode of transportation did you use to travel to South Padre Island?

Automobile	69.39%
Fly / drive	26.66%
Other (specify)	0.00%
No Response	5.77%

If fly / drive, which airport?

- **Brownsville (6)**
- CC International
- **Harlingen Airport (4)**

Other:

- No "other" responses were given

Fall 2001 Intercept Interview Findings and Responses

11. Please estimate how much you will spend during this trip to South Padre Island?

Area	Highest amount	Lowest amount	Average amount
Lodging	\$500.00	\$100.00	\$235.74
Shopping	\$500.00	\$50.00	\$188.48
Trans., fuel, airfare, etc.	\$600.00	\$20.00	\$145.83
Food/meals	\$350.00	\$40.00	\$125.00
Attractions/amusements	\$300.00	\$25.00	\$115.36
TOTAL	\$1,250.00	\$80.00	\$576.11

12. Overall, on a 5-point scale (where 5 is Excellent, 3 is Average, and 1 is Poor), how would you rate your visit to South Padre Island?

5 (Excellent)	21.74%
4	36.96%
3 (Average)	15.22%
2	15.22%
1 (Poor)	10.87%
No Response	11.54%

13. Which of the following would you participate in if offered in South Padre Island? (Circle the number of all that interest you).

Top FOUR responses in bold.

Outlet Mall	46.81%
Water Park	44.68%
Mexico Shopping Shuttle	29.79%
Water Sports Learning Center (instructions)	23.40%
Fine Dining Restaurant	21.28%
Man-made Lagoon Where You Can Swim With Tropical Fish	21.28%
Golf Resort	19.15%
Arts & Crafts Festival	17.02%
Aquarium	14.89%
Botanical Garden	10.64%
Biking/Cycling Tours	6.38%
Rio Grande Valley History & Heritage Museum	6.38%
Guided Birding and Nature Excursions	4.26%
Wildlife Festival	4.26%
Other (specify)	2.13%

“Other” responses include:

- No “other” response given.

Fall 2001 Intercept Interview Findings and Responses

14. What did you like or dislike most about South Padre Island?

Likes Of Respondents

- **Beach (12)**
- **Beach clean (7)**
- Bed & Breakfast
- Clean environment
- **Climate (2)**
- Desolate areas
- Dolphin tours
- **Entertainment (2)**
- Environment
- Fishing
- Food
- Golfing
- Hotels
- Humidity
- Inn
- Lack of tourists
- Ladies
- New golf course
- No traffic once across
- Nothing
- **People (5)**
- Proximity to home
- Residents
- Restaurant
- Sales
- **Scenery (4)**
- Shopping
- **Sights (2)**
- Town
- Uncrowded beaches
- Weather

Dislikes Of Respondents

- Availability of transportation
- Cost of taxi
- Cost of transportation
- Ferry
- Food
- Having to pay a taxi
- Inconvenience of broken bridge
- Lack of food
- Lack of shops & open attractions
- Lack of transportation
- Pay for taxi
- **Shuttle (3)**
- **Shuttle didn't stop (2)**
- Shuttle wait
- Stupid shuttles
- Taxi ride
- Taxi shuttle
- **Taxis (3)**
- **The long wait to get across (3)**
- Time lapse to get there
- **Transportation (13)**
- Transportation charges
- Transportation problem
- Transportation when we got across
- Transportation - shuttle
- Travel issues
- Wait for ferry
- **Wait time (2)**
- Waiting for transportation

Fall 2001 Intercept Interview Findings and Responses

15. Are you planning to visit South Padre Island in the future?

Yes	78.79%
No	21.21%
No Response	36.54%

If Yes, what month(s) do you plan to visit? (Circle the number of each month mentioned).

Top TWO responses in bold.

January	3.85%
February	11.54%
March	26.92%
April	7.69%
May	3.85%
June	11.54%
July	0.00%
August	7.69%
September	26.92%
October	3.85%
November	3.85%
December	23.08%

16. What is your age?

Ages range from 21 to 57. Average = 32.46.

17. Are you? (Male or female)

Males comprised 41.67% of respondents; females 58.33%.

Fall 2001 Intercept Interview Findings and Responses

18. What is your occupation?

- Air Force
- Business Manager
- Cashier
- Clerk
- Construction Foreman
- Controller
- CPA
- Fashion Designer
- Grocery stocker
- **Homemaker (4)**
- Investment Advisor
- Makeup Artist
- Market Consultant
- Marketing
- Medical Asst.
- Not employed
- Office Manager
- **Operator (2)**
- Paramedic
- Police Officer
- Programmer
- Retail
- RN
- Sales
- Sales & Advertising
- Sales Engineer
- Sales Rep
- **Secretary (3)**
- Security
- Service Consultant
- Sr. VP Networking
- Stockbroker
- **Student (2)**
- **Teacher (3)**
- Travel Agent
- Truck Driver
- US Air Force
- Waitress

Summary

Randall Travel Marketing, Inc., conducted executive interviews with business and community leaders in South Padre Island, Port Isabel, and the region as part of the overall comprehensive tourism study. Over twenty interviews were conducted. Respondents included hoteliers, bankers, restaurant owner/managers, attraction managers, retail owners, and various travel industry leaders.

Each respondent was assured of anonymity. The following is a summary of the input gathered.

1. Tourism marketing success is considered critical for South Padre Island and Port Isabel.

Community and business leaders are clear that successful tourism marketing is of utmost importance to the economic well being of South Padre Island and Port Isabel. This was the unanimous consensus of the respondents. Thus, the nurturing of tourism, tracking and monitoring growth, and ensuring growth is considered vital.

2. A committed "vision" for tourism and long-range plan is missing.

The majority of community leaders reported the need for a long-range plan for tourism growth as one of the most obvious needs. Although some respondents were more ardent in their discussion of this point, all who mentioned this felt that such a plan is critical in order to assure long-term sustainability and economic strength. It is also felt that such a long-range plan will help put an end to "political advantages" and shortsighted decisions. Overall, the community feels that if tourism is to remain the primary driver of the economy, a long-range plan must be put in place and the results monitored.

3. The "curb appeal" of South Padre Island needs to be improved.

Most respondents felt that beyond the need for an overall plan, the "look" of the Island needs attention. Specific comments included phrases such as tacky, shopworn, tired, run-down, etc. It is felt that this lack of visual appeal is unhealthy for the economy and long-term viability of the Island.

Executive Interviews

- 4. Target a higher socio-economic target and “drive the market upwards.” Texas families and affluent Mexican nationals (in and near Monterrey) are the best customer markets. More marketing efforts geared to Texas families and the Mexican nationals are desired.**

There is great consensus that the best economic markets to pursue consist of families in Texas and the Mexican nationals in primary feeder markets. For off-season visitation “Winter Texans” are added to this group. These markets are recommended for growth. The Spring Break crowd is considered necessary although not highly desirable to most of the respondents.

- 5. Reduce the percentage of the CVB budget spent on marketing Spring Break.**

Several respondents reported their concern that one-third of the total CVB marketing budget was spent in promoting Spring Break. Several respondents felt there should be no promotion for Spring Break at all. However, the majority strongly felt that the percentage of overall budget spent on this market should be reduced and more desirable, affluent markets targeted.

- 6. The “nature” positioning is excellent for long-term promotion of SPI.** This was unanimously echoed by virtually all respondents. The nature positioning is seen not only as a marketing tool, but as an environmental stand as well. Leaders want to protect and preserve SPI and ensure its long-term product appeal.

- 7. The CVB is doing a good job and is well regarded by community leaders.**

Virtually all of the hotel, retail, restaurant and attraction managers we interviewed spoke well of the CVB. It is seen to be working steadily and using its resources wisely. The most consistent comment we heard is that they need more funding for greater outreach.

- 8. More money is needed for increased outreach.**

Again, this was the most consistent comment we heard when discussing how best to grow the tourism market. It is felt that an increased budget will allow for greater outreach to desired markets.

9. More upscale, full-service lodging is needed.

Upscale lodging and a new full-service hotel are the most desired new tourism infrastructure needs. Respondents fear that the lack of more upscale lodging and an additional full-service hotel is a barrier to increased visitor expenditures. Interestingly, even the other hotels want to see a new upscale property added to the product mix.

10. Meeting and conventions are good for the off-season times.

Meetings and conventions are seen as desirable. However, respondents also acknowledge that blocking large numbers of rooms is a challenge when those same rooms can be rented at a higher rate to leisure visitors. Thus, meetings that "fill the gaps" are desired.

Convention & Meetings Survey Findings & Responses

Methodology

Telephone interviews were conducted with convention/meeting planners to determine effective methods for increasing conventions and meetings for South Padre Island.

Event planners who had held events at the SPI Convention Centre were surveyed to determine their decision-making criteria and level of satisfaction with the Convention Centre. The SPICVB staff provided RTM with a complete chronological listing of all 2000 bookings. Fifteen SPI Convention Centre users who had planned events that had driven overnight visitation to the South Padre Island area were surveyed.

RTM also surveyed fifteen event planners that had held their meetings at South Padre Island area lodging but did not use the SPI Convention Centre. Additionally, seventeen event planners that chose not to use South Padre Island as a meeting site. The objective of these surveys was to determine their level of knowledge and perception of the South Padre Island area as a meeting / conference site. Respondents were also asked what they looked for in a potential meeting site. The following is a summary of the three surveys that were conducted.

- Event planners that did not use South Padre Island most often used Dallas, Houston, San Antonio and Austin for their meetings.
- The SPI Convention and Visitors Bureau staff received very good ratings from all three event planner groups.
- The condition of the Convention Centre facilities, services provided by the Convention Centre and parking at the Convention Centre all received strong ratings from planners that had used the Convention Centre.
- 93% of planners that used the Convention Centre plan to use the Centre again.
- 89% of planners that used the Convention Centre said that a shuttle between the Centre and the island hotels would assist their groups.
- The issue mentioned most often regarding the Convention Centre from event planners that had used the facility was the lack of concession services.
- The driving distance between the regional airports (Harlingen and Brownsville) and South Padre Island is an issue for many of the event planners surveyed.
- Many Texan event planners want locations that are central to their Texan attendees/ membership—they see South Padre Island as too isolated. This is especially true for groups made up of older members. Seniors are changing their travel behavior and staying closer to home.
- Many of the Texas state agencies find the lodging rates on South Padre Island too high for the per diem rate allowed by the state.
- Many event planners view their meetings as too small to use the Convention Centre.

Convention & Meetings Survey Findings & Responses

Questions 1-11 were only asked of meeting planners that had never been to South Padre Island OR had held a meeting on SPI but had not used the Convention Centre.

The three types of convention/meeting planner included in this survey are listed below and the abbreviated title used in this report is shown to the right of each category.

Meeting planners who have never held a meeting on SPI = "Never Been To SPI"

Meeting planners who have held meetings at SPI hotels only = "Hotel Meeting Only"

Meeting planners who have held meetings at the SPI Convention Centre = "Conv Center & Hotel"

N = 47

1. What is the minimum and maximum number of attendees at your meetings?

	Minimum			Maximum	
	Never Been to SPI	Hotel Meeting Only		Never Been to SPI	Hotel Meeting Only
1 - 10	2	1	1 - 200	3	6
11 - 25	1	3	201 - 500	7	7
26 - 50	6	2	501 - 750	1	0
51 or more	7	4	751 or more	5	2

2. What is the minimum and maximum number of available rooms required?

	Minimum			Maximum	
	Never Been to SPI	Hotel Meeting Only		Never Been to SPI	Hotel Meeting Only
1 - 10	1	1	1 - 100	0	3
11 - 50	4	4	101 - 250	6	7
51 - 100	1	1	251 - 500	2	3
101 - 300	3	0	501 - 1000	2	0
301 or more	1	0	1001 or more	2	1

Convention & Meetings Survey Findings & Responses

3. What price range do you require for room rates when hosting a meeting?

	Minimum		Maximum		
	Never Been to SPI	Hotel Meeting Only	Never Been to SPI	Hotel Meeting Only	
\$40-\$70	1	2	\$50 - \$99	0	3
\$71 - \$80	0	1	\$100 - \$120	4	1
\$81 - \$100	3	0	\$121 - \$140	1	2
\$101 or more	0	1	\$141 - \$160	0	1
			\$161 or more	0	0

4. Do you host all of your meetings in the state of Texas?

	Never Been to SPI	Hotel Meeting Only
Yes	8	9
No	7	4

5. What seasons of the year do you host meetings?

	Never Been to SPI	Hotel Meeting Only
Spring	6	6
Summer	10	6
Fall	6	6
Winter	4	3

Convention & Meetings Survey Findings & Responses

6. List your favorite Texas locations that you have used in the past for meetings / conferences.

Never Been to SPI	Hotel Meeting Only
Dallas (9)	Dallas (6)
Houston (8)	Houston (6)
San Antonio (8)	San Antonio (6)
Austin (4)	Austin (4)
El Paso (3)	Abilene (2)
Ft. Worth (3)	El Paso (2)
Corpus Christi (2)	Galveston (2)
McAllen (2)	Corpus Christi
Abilene	Fredericksburg
Galveston	Ft. Worth
Harlingen	Lubbock
Irving	Midland
Lubbock	Plano
Plano	
South Lake	

7. Have you hosted a meeting in South Padre Island?

	Never Been to SPI	Hotel Meeting Only
Yes	0	15
No	17	0

8. Are you familiar with the South Padre Island Convention Centre?

	Never Been to SPI	Hotel Meeting Only
Yes	6	10
No	10	3

Convention & Meetings Survey Findings & Responses

9. Have you been contacted by or worked with the South Padre Island CVB?

	Never Been to SPI	Hotel Meeting Only
Yes	5	8
No	9	4

10. Please use the following scale to rate your overall impressions of the South Padre Island area as a meeting or conference site.

5=favorable 1=not favorable

Location

	5	4	3	2	1	Avg. Score
Never Been to SPI	3	1		3		3.57
Hotel Meeting Only	2	4	1	1		3.88

Quality of meeting facilities

	5	4	3	2	1	Avg. Score
Never Been to SPI			3	1		2.75
Hotel Meeting Only	1	2	1	1		3.60

Quantity of meeting facilities

	5	4	3	2	1	Avg. Score
Never Been to SPI		2	1			3.67
Hotel Meeting Only		2	2			3.50

Quality of available lodging

	5	4	3	2	1	Avg. Score
Never Been to SPI	1	1	1			4.00
Hotel Meeting Only	4	3			1	4.13

Quantity of available lodging

	5	4	3	2	1	Avg. Score
Never Been to SPI	2				1	3.67
Hotel Meeting Only			3			3.00

Quality of available restaurants

	5	4	3	2	1	Avg. Score
Never Been to SPI			3			3.00
Hotel Meeting Only	1	1				4.50

Quantity of available restaurants

	5	4	3	2	1	Avg. Score
Never Been to SPI				1		2.00
Hotel Meeting Only	1	1	1			4.00

Convention & Meetings Survey Findings & Responses

10. (Cont'd)

Please use the following scale to rate your overall impressions of the South Padre Island area as a meeting or conference site.

5=favorable 1=not favorable

South Padre Island CVB

	5	4	3	2	1	Avg. Score
Never Been to SPI	2	1	2			4.00
Hotel Meeting Only	6		1			4.71

Convenience of lodging/meeting sites

	5	4	3	2	1	Avg. Score
Never Been to SPI		2	1			3.67
Hotel Meeting Only	3	1	1			4.40

SPI Convention Centre

	5	4	3	2	1	Avg. Score
Never Been to SPI		2				4.00
Hotel Meeting Only	1	1	2			3.75

Overall

	5	4	3	2	1	Avg. Score
Never Been to SPI			1			3.00
Hotel Meeting Only	4	1	1			4.50

NOTE: Respondents offered ratings only in the categories that were familiar to them. Most had little or no impression of the categories as they related to South Padre Island.

Convention & Meetings Survey Findings & Responses

11. What factors are most important to you when selecting a meeting or conference location?

Never Been to SPI	Hotel Meeting Only
Location (6)	Price (6)
Price (5)	Location (3)
Airport accessibility (3)	Accessibility (2)
Central Location (3)	Location--family resort (2)
Accessibility (2)	Activities for all
Activities	Attractions
Attractions	Convention/Conference Center Facilities
Large enough facilities	Facilities
Conf. Center	Food & Ambiance
Convenience	Fringes from Convention Centre
Convention Centre facilities and services	Golf
Parking	Hotel
Resort Area	Quality
	Restaurants/Shopping
	Rooms at meeting location
	Weather

Questions 12 - 20 were only asked of meeting planners that had held a meeting on SPI AND used the Convention Centre.

12. How many times have you used or met at the South Padre Island Convention Centre?

	Conv Centre & Hotel
One time	5
2 - 5 times	7
6 - 10 times	3
11 or more	0

13. What was the approximate attendance of your event?

	Conv Centre & Hotel
1 - 100	0
100 - 500	8
500 - 1,000	4
1,000 - 5,000	2
5,001 or more	1

Convention & Meetings Survey Findings & Responses

14. What was the percentage of attendees from outside the state of Texas?

	Conv Centre & Hotel
0%	6
1% - 5%	6
6% - 10%	0
11% - 20%	1
21% or more	1

15. On a scale where 5 = very important and 1 = not important, how important were each of the following in deciding to use or meet at the South Padre Island Convention Centre?

	5	4	3	2	1	Avg. Score
Size of facility	8	2	1		1	4.33
Convenience to participants	7	3	2			4.42
Availability of Parking	6	1	2		1	4.10
Availability of food service	6	1	1		2	3.90
General location	7	3				4.70

16. On a scale where 5 = very satisfied and 1 = not satisfied, how satisfied were you with each of the following attributes of the South Padre Island Convention Centre?

	5	4	3	2	1	Avg. Score
Location - convenience to participants	4	1	6			3.82
Location - convenience to lodging	7	4	1			4.50
Location - convenience to restaurants	4	2				4.67
Condition of Convention Centre facilities	6	6	1			4.38
Services available at Convention Centre	8	4	1			4.54
Parking at Convention Centre	6	3	1			4.50

Convention & Meetings Survey Findings & Responses

17. While using or meeting at the South Padre Island Convention Centre, did you or your group patronize any of the following?

	Yes	No
Lodging	15	0
Restaurants	7	6
Shopping	11	3
Attractions	12	2

How many nights did your group require at local lodging properties

1 night	1
2 nights	4
3 nights	3
4 nights	2
5 nights	1

18. Would a shuttle between the Convention Centre and island hotels assist your group?

Yes	No
8	1

19. What improvements should be made to the South Padre Island Convention Centre to entice you to use or meet at the South Padre Island Convention Centre in the future?

- Enlarge center so don't have to do offsite meetings.
- Make Convention Centre bigger--needs more meeting space.
- Make is easier to use concessions.
- Need more control over air conditioner--either too cold or too hot.
- None
- None

20. Do you plan to use or meet at the South Padre Island Convention Centre again?

Yes	No
13	1

Why?

- Convenience
- Great location.
- Growing too big for SPI. (From one "no" response.)
- Love SPI
- Relaxing atmosphere; can wear shorts; beach access

Convention & Meetings Survey Findings & Responses

Questions 21-25 were asked of all three groups.

21. What improvements could be made to the South Padre Island area to entice you to hold meetings or conferences there in the future?

Never Been to SPI
None
Move Airport closer
Hotels need to be closer to Convention Centre or need busing between
Move hotels closer to Convention Centre
Move SPI to the center of the state
Airport
Hotel Meeting Only
Prices
None
Airport
More rooms
Hotel with Convention Centre
Conv Centre & Hotel
Better signage and Maps.
None
None
Unified hotel booking.

22. South Padre Island is considering building a hotel connected to the Convention Centre. If built, would this hotel make South Padre Island more attractive to your group as a meeting/convention location?

	Never Been to SPI	Hotel Meeting Only	Conv Centre & Hotel	Total
Yes	11	8	12	31
No	2	4	2	8

Convention & Meetings Survey Findings & Responses

23. Would 300 rooms be enough?

	Never Been to SPI	Hotel Meeting Only	Conv Centre, & Hotel	Total
Yes	11	7	11	29
No	1	2	2	5

If no, how many rooms would be enough?

Two respondents said 500 rooms. The remaining "no" respondents were not sure.

24. One possible location for the proposed hotel would be about 100 yards away from the Convention Centre. Would this be too far of a distance for your group?

	Never Been to SPI	Hotel Meeting Only	Conv Centre & Hotel	Total
Yes	5	3	4	12
No	5	6	8	19

Convention & Meetings Survey Findings & Responses

25. Any additional comments?

Never Been to SPI
Airport is too far away
Center is not large enough for our meeting
Don't use Convention Centres for our smaller meetings (usually use resorts) and SPI Convention Centre too small for our larger meetings
SPI is too far away for our group
Didn't consider SPI Convention Centre because it could not handle our dining needs
Convention Centre could work for our smaller meetings
SPI is too small for our group
We don't usually go as far as SPI for our meetings
Hotel Meeting Only
Rates are too high for State required rates
We will not go back. The CVB oversold its services--over promised and didn't deliver. Left meeting planner in a lurch. Holiday Inn and Radisson were not quality locations and staff had a bad attitude.
SPI is far away
Great staff at CVB
We are a small group--don't need a Convention Centre.
Not interested in Convention Centre--our meetings are not big enough.
We prefer to use a hotel for all of our services
We were very unhappy with the Bahia Mar.
SPI is too far away. As we are getting old and creaky, staying closer to home.
Too far away for our members.
Nice little Convention Centre.
Hotels aren't all equipped for meetings
100 yards will only be OK if property is on the beach.
Conv Centre & Hotel
We are getting too big--about to bust out of center.
Concession stand should be open for all meetings.
We prefer everything under one roof.
New hotel not advantage because most of our folks want to stay on the beach.
Shuttle a must, especially if hotel is not built.
Have to think differently when traveling to SPI--have to fly, etc.
Great site.
Yes!!! to shuttle.
Best ever service from CVB staff.
City made us move date of convention because of Spring Break--hurting our business.

Convention & Meetings Survey Findings & Responses

Convention / Meeting Statistical Data

The following statistics related to meetings and conventions were obtained from reports generated by the South Padre Island Convention and Visitors Bureau.

The following statistics show the number of conventions and meetings booked by SPICVB staff members since 1992. The number of conventions each year has tripled since 1997.

Convention and Meeting Bookings

Year	Conventions	Meetings
1992	6	14
1993	15	20
1994	15	16
1995	16	17
1996	15	18
1997	15	16
1998	29	20
1999	31	14
2000	50	8

Statistics related to Convention Centre bookings in year 2000

- The Convention Centre was utilized for a convention or meeting on 157 days out of 365 (43% of the year)
- Conventions and meetings held at the Convention Centre resulted in 27,914 room nights in South Padre Island lodging properties in year 2000
- 41,440 attendees participated in the meetings and events booked at the Convention Centre
- Point of origin for the fifty eight conventions and meetings held at the Convention Centre included:
 - 51 originated in Texas
 - 32 were from the Rio Grande Valley (local region)
 - 7 were from Dallas, Houston or Austin
 - 4 were from San Antonio
 - 2 were from out of state

SPICVB statistics related to convention & meetings held at hotels in the year 2000

- 17,000 room nights sold
- 125 events at hotels had SPICVB involvement
- Point of origin for the hotel meetings and conventions
 - 105 originated in Texas
 - 22 were from the Rio Grande Valley (local region)
 - 36 from Austin, Dallas or Houston
 - 10 from San Antonio
 - 18 were from out of state

Visitor Survey Findings and Responses

Mail Survey Methodology

1,000 surveys were mailed to a stratified random sample of the total inquiries received by the South Padre Island CVB during a twelve-month period. The surveys were mailed in January 2001. A total of 230 surveys had been received by May 1, 2001. The survey instrument (questionnaire) was printed on a single sheet of 11'x 17" white paper and folded to a four page 8 ½" x 11" letter size format. The survey was mailed in an envelope at first class postage rate and a postage paid return mail addressed envelope was included. The survey included an incentive of a drawing for a free weekend visit to be selected from those that responded to the survey.

The survey contained twenty-six questions. Each question is stated below in numerical sequence and the findings and responses follow each question. Observations and conclusions based on the responses are printed in italics after each response.

N = 230

1. *Did you receive the South Padre Island, Texas information sent to you earlier?*

Yes	82.53%
No	8.73%
Don't Remember	8.73%
No response	0.43%

Slightly over four-fifths (82.53%) of respondents report they remember receiving the information. Slightly less than one-tenth (8.73%) report they do not recall receiving the information. And less than one-tenth (8.73%) do not recall whether they received the information or not. (N=230, 0.43% No response).

Thus, the South Padre Island CVB can have confidence that respondents are answering the questions in this report based on remembering that they received the information.

Visitor Survey Findings and Responses

2. Was there information you expected to receive, but didn't?

Yes	13.04%
No	86.96%
No response	20.00%

If yes, what was missing?

- COMPLETE LIST OF LODGING
- ACTIVITIES TO DO LIKE DOLPHIN WATCHING, DUNE BUGGY RENTALS, ETC.
- COST OF ACCOMMODATIONS, RENTAL, ETC, EVENT CALENDER AS WHEN BETTER RATES
- COUPONS
- HORSEBACK RIDING/HORSE CAMPING
- I EXPECTED MORE THAN 1 BROCHURE, LIKE ATTRACTIONS, PLACES TO STAY, ETC
- I WANTED MORE INFORMATION ABOUT BEACHES, HOTELS, FAMILY VACATIONS
- INFORMATION IN MAIL DETAIL IN TRANSPORTATION OPTIONS
- MAP
- MAP FROM AIRPORT TO SOUTH PADRE
- MORE GENERAL INFORMATION
- MORE PLACES TO DINE OUT
- NOT ENOUGH INFORMATION ON ACCOMMODATIONS
- ROOM RATES & SPECIAL AIR FARE

The information requested by potential visitors to an area often does not meet or only partially meets their information needs. A substantial 86.96% responded No to this question, indicating that they had received the kind of information they expected. Slightly more than 13% reported their expectations were not met by the kind of information they received. Two-fifths (20.00%) of the respondents did not answer the question. (N=230, 20.00% No response).

In this report, we see that the information sent to those who requested it did meet their expectations. This is a positive sign that the South Padre Island CVB is meeting the information needs of potential visitors. However, one must also realize that although the majority of the respondents report that the information they received matched their expectations, as an industry we have trained the public to expect certain types of information. This does not necessarily mean that the information is as good as it can be. *It means that the information is similar to information they normally see about a destination.*

Visitor Survey Findings and Responses

3. Did you ever travel to or through the South Padre Island, Texas area before you received the information?

Yes	32.45%
No	67.55%
No response	18.26%

This question was asked to determine if potential visitors made a trip to South Padre Island prior to requesting information. Slightly more than two-thirds (67.55%) stated they had not traveled to or through South Padre Island before receiving the information. A little less than one-third of the respondents (32.45%) stated they had traveled to South Padre Island prior to receiving information. Slightly less than one-fifth of the total respondents (18.26%) did not respond to the question. (N=230, 18.26% No response)

The responses to this question indicate that a significant majority of respondents have never visited South Padre Island and, therefore, the information is targeting many new potential visitors to the area. However, a significant level of familiarity with the destination was reported by slightly less than one-third of the respondents (32.45%) of the responses. This indicates that many travelers are requesting information from the South Padre Island CVB to plan repeat visits to the island.

Thus, South Padre Island and Port Isabel might capitalize upon its existing level of familiarity and also add significant numbers of new visitors through its tourism marketing efforts.

Visitor Survey Findings and Responses

4. Did you travel to or through the South Padre Island, Texas area after you received the information?

Yes	34.76%
No	65.24%
No response	18.70%

This question was asked as a qualifying question to sort the potential visitors into those who made and those who did not make a trip to the area. Those who made a trip continued with more detailed questions about their trip; those who did not make a trip answered general demographic questions only. Slightly more than one-third (34.76%) did travel to the South Padre Island after they received the information, while slightly less than two-thirds (65.24%) did not choose to make the trip. Slightly less than one-fifth (18.70%) did not answer the question.

Thus the expected conversion rate for the South Padre Island CVB can be predicted to be just under the 35% (34.76%) level.

Visitor Survey Findings and Responses

5. How many times have you visited the South Padre Island, Texas area since you received the information?

Average Number of times = 1.64

85.25% of respondents that answered question #5 reported 1 time

Circle the months during which you visited.

Jan	3.04%
Feb	5.22%
Mar	2.61%
Apr	0.87%
May	2.61%
Jun	4.35%
Jul	3.91%
Aug	3.48%
Sep	2.61%
Oct	1.74%
Nov	2.61%
Dec	1.74%
No response	71.74%

This question was asked to discern how many trips resulted from the visitor information distributed by the South Padre Island CVB and to document the months of visitation by inquirers. The respondents report that the months with highest visitation to South Padre Island were February, June and July. The months of April, October and December had the lowest visitation.

This information somewhat matches information provided by the State of Texas for general visitation to the Texas Gulf Coast area. Traditionally summer and winter have been the highest visitation seasons, with fall and spring the lowest. The low visitation in the spring and autumn months indicates a great opportunity for future promotion of off-season visitation. The low response in March is attributed to the large influx of Spring Break travel that is generated through referrals from friends, repeat visits and the SPICVB website. Thus the Spring Break crowd does not use traditional inquiry methods through the CVB.

National trends tell us that off-season visitation is growing as the typical consumer is taking more frequent, short-term vacations to escape urban areas. Also, there appears to be mixed results here indicating that perhaps various local events or functions may account for some of the visitation patterns.

Thus, the South Padre Island CVB needs to examine local events and visitation patterns and develop strategies for increasing visitation during the months of April, May, August, September, October, November and December.

Visitor Survey Findings and Responses

6. Regarding the South Padre Island information you received, what do you remember liking or disliking the most? (write in your answers)

Information Likes Of Survey Respondents

- **Accommodations (2)**
- **Activities / Descriptions (4)**
- Allowed Better Plan. Of Week's Activities
- **Attractions Guide (3)**
- Beaches South Padre Brochures
- Beautiful
- Bright; Catchy
- Calendar Of Events
- Camping Information
- Casino Tour
- **Condo Listing / Information (4)**
- Detailed Information
- Didn't Have A Brochure For Every Motel
- Enough To See/Do In Area
- Events
- **Everything (3)**
- Food
- **Friendly People (2)**
- Good Information
- Gulf Coast
- **Hotel / Motel Info (Prices / Locations) (12)**
- Information On Events
- Info About Island Hotels, Rest. & Beaches
- **Information On Area (2)**
- It Was What I Wanted
-
- **Maps (6)**
- Nice Overview Of Area
- Not Too Crowded
- Off Season As Far As Fewer People
- **Pictures (7)**
- Places To Visit
- Recreation
- Rental Information
- Resort
- **Restaurants (7)**
- Scenery
- Seafood
- Shells At Seaside
- Shopping Opportunities
- The 8 X 10 Colorful Book
- The Flyers With Info About Trolley
- The Overall Area
- The Wave Texas Guides
- Total Package
- Variety
- Very Compact, Nice Brochures
- **Very Informative (5)**
- Wanted To Bike & Go Cart But Could Not Locate On Brochure
- **Weather, Temp (2)**
- Welcome Centers

Visitor Survey Findings and Responses

6. (Cont'd)

Information Dislikes Of Survey Respondents

- Activities To Do Like Dolphin Watching, Dune Buggy Rentals, Etc.
- Cost
- Crowded Brochure
- Hotel Listings
- Inadequate Parking For Beach Access
- Lack Of Information About Surrounding Area & Mexico
- Lack Of Major Hotel Chains
- More Discount Hotel Information
- More Fishing Information
- More Information On Boats To Rent
- Much More Information On The Island Could Have Been Made Available
- **N/A (6)**
- Need A Better Map Of Area
- **Need More Information About Condos (2)**
- Needs More Information On Restaurants
- No Coupons
- **No Fishing Information (2)**
- No Warnings Of The Jelly Fish At Shore, More Than Usual, We Heard
- None
- Not All Establishments Were Identified
- Not Enough Coupons For Hotels, Rest.
- Not Enough Information On Attractions
- Not Enough Information On Attractions & Maps Were Not Very Good.
- Not Many Stores To See That Where Open
- Not Much To Do At Night
- **Nothing (6)**
- Pictures Of Condos Needed
- Places To Stay (Was Not Intrested)
- Pricing & Cat. Of Dining Were Not Available
- Restaurant Listings
- Some Of The Shops Were Closed
- Somewhat Disorganized
- Specifics Lacked For Lodging But Found On Internet Struggled To Determine Place Close To Beach For Lodging. Actually Needed Go To See & Understand.
- **The Weather At The Time (2)**
- Wind
- Would Have Liked More Info.

This question was asked to determine which information is most important to potential visitors and how well the South Padre Island CVB is meeting these needs.

The same items are often listed as likes and dislikes. Every respondent has a different level of expectation and therefore the same map can be satisfactory to one person and inadequate to others.

Thus, the South Padre Island CVB can be assured that it is providing an appreciated information service. Also, the South Padre Island CVB now has evidence of what potential visitors would most like to see in revised, updated visitor information.

Visitor Survey Findings and Responses

7. Where did you find out about the information packet?

The TOP FIVE are in bold.

Internet – South Padre Island CVB website	8.26%
Guides – Texas State Travel Guide	6.96%
Brochures – South Padre Island Brochure	6.96%
Magazines – AAA Home & Away	4.78%
Internet – Texas Tourism website	4.35%
Magazines – Southern Living	3.91%
Guides – AAA Tour Book	3.91%
Magazines – Texas Monthly	3.48%
Welcome Centers – South Padre Island Welcome Center	3.04%
Other (specify)	3.04%
Guides – South Padre Island Visitor Guide	2.61%
Welcome Centers – Texas Welcome Center (I-35)	2.61%
Newspapers – Travel feature stories	1.30%
Magazines – Modern Maturity	1.30%
Internet – Other website (specify)	1.30%
Welcome Centers – Texas Information Center (Harlingen)	1.30%
Guides – Rand McNally Road Atlas	0.87%
Newspapers – Newspaper ads	0.43%
Guides – Rio Grande Valley Regional Guide	0.43%
Magazines – Better Homes & Gardens	0.00%
Magazines – Midwest Living	0.00%
Travel Shows – Kansas City Sport Show	0.00%
Travel Shows – Cincinnati Travel, Sport & Boat Show	0.00%
Welcome Centers – Texas Welcome Center (I-30)	0.00%

Listed as “Specify” for “Internet – Other website”:

- DON'T REMEMBER FOR SURE
- RENTALS

Listed as “Specify” for “Other”:

- DON'T KNOW
- FAMILY LIVES IN AREA
- FRIEND WHO GOES OFTEN
- INTERVAL INTERNATIONAL TIME SHARE
- MY LOCAL CHAMBER OF COMMERCE
- MY SON & HIS FAMILY
- PEOPLE VISITING 2 MONTHS PRIOR

Visitor Survey Findings and Responses

7. (Continued)

It is useful to know where potential visitors find out about travel information packets. This information will help with the planning of future marketing strategies.

According to Travel Industry of America (TIA) national surveys have identified the following as the most preferred sources of information about travel destinations:

- Recommendations by friends and family
- State travel guides
- Brochures
- Magazines
- Newspapers
- TV
- Internet

The most frequently mentioned source (8.26%) in the South Padre Island study is the South Padre Island CVB website. Up until 1999, most similar research studies conducted by RTM indicated the state travel guide as the top source that visitors list for source of information about a particular destination. However, we have seen the Internet's response rate increasing over the past few years and in the last year the Internet has been the number one source of information in most of the studies RTM has completed.

The South Padre Island CVB Visitors Guide had a response of 6.96% and ranked third as an information source. In comparison with other similar destinations we have studied and comparing to national data this percentage is good, but could be improved upon.

Thus, the South Padre Island CVB website, the Texas State Travel Guide, the South Padre Island Brochure, AAA Home & Away and the Texas Tourism website are prime sources for visitors interested in South Padre Island and Port Isabel. Additionally we see that the South Padre Island CVB must place high emphasis on developing an improved outreach strategy to generate increased inquiries from its primary brochures.

Visitor Survey Findings and Responses

8. How many nights did you spend in South Padre Island?

Typical responses = 2 to 7, Average number of nights = 4.00.

The average length of time visitors stay in an area is a useful piece of information when planning marketing strategies. The majority of the responses to this question represented two to seven night stays with the average of 4.00 nights reported.

The responses here are comparable to what RTM typically finds in coastal areas. This tells us that visitors either plan weekend getaways or weeklong coastal stays based on activities, visiting friends and relatives, or the desire for relaxation and fun. It must be noted that beach communities are among the last destinations to maintain the weeklong visitation pattern. The American traveling public uses their allotted vacation time to take an increasing number of long weekend getaways. The beach remains popular for the weeklong family vacation.

Thus, we see here that the South Padre Island CVB can have confidence in its product as having appeal for a two to three night stay and weeklong vacations. Future product development and effective promotion of additional activities in the area will drive increased off-season and shoulder season visitation.

Visitor Survey Findings and Responses

9. What was the main purpose of your last visit to South Padre Island?
(Circle main purpose or reason for your visit)

The TOP FIVE responses are in bold.

Vacation / getaway	89.09%
Meeting / convention	3.64%
Windsurfing or other sports events	3.64%
Visit friends / relatives	1.82%
Other (specify)	1.82%
Bird watching	0.00%
Visit a county park	0.00%
Business	0.00%
Reunion	0.00%
Relocation	0.00%
Golf trip	0.00%
Festival / event	0.00%
Fishing / boating	0.00%
Shopping	0.00%
Camping	0.00%
School / church / club group trip	0.00%

Other:

- WERE IN DEL RIO, TX & WANTED TO SEE THE COAST.

The primary purpose of a trip is often a key around which promotional messages can be developed.

Here we see the largest percentage (89.09%) reported Vacation/Getaway as the primary trip purpose. This is very encouraging as it clearly identifies interest in South Padre Island and Port Isabel as a vacation destination.

This tells us that South Padre Island and Port Isabel can have confidence that it is perceived to be a potential getaway and vacation destination. Thus, people are predisposed to visit.

Visitor Survey Findings and Responses

10. *What type of lodging did you use most during your last visit? (Circle one)*
The TOP THREE are in bold.

Hotel	35.38%
Motel	27.69%
Condominium	27.69%
Campsite / campground	4.62%
Friends / family residence	3.08%
Rental house / cottage	1.54%
Bed & breakfast inn	0.00%
Other (specify)	0.00%

Other:

There were no "Other" responses for this question.

Awareness of the types of lodging used by visitors will help the South Padre Island CVB track and document the impact of its marketing efforts for its lodging constituents.

In this study, the largest percentage of respondents reported they stayed in a hotel or motel (63.07%). Condominiums were the next largest category of overnight choices (27.69%).

This information matches what RTM typically finds in coastal areas. Generally we find that the majority of tourists prefer a hotel or motel.

The findings in this study reveal that leisure travelers prefer hotels and motels when not staying with friends and relatives. Thus, leisure travelers are prime target markets for hotels and motels in South Padre Island and Port Isabel.

Visitor Survey Findings and Responses

**11. What mode of transportation did you use to visit South Padre Island?
(Circle one). Top response in bold.**

Automobile only	70.77%
Combination fly / drive	26.15%
Motor coach	3.08%
Other (specify)	0.00%

If yes to "fly / drive", what airport did you fly into?

- BROWNSVILLE (5)
- CORPUS CHRISTI
- **HARLINGEN (10)**
- SAN ANTOINO

If yes to "fly / drive", what airline did you fly?

- **AMERICAN (4)**
- CONTINENTAL (2)
- SOUTHWEST (3)
- SUN COUNTRY (2)
- TWA (3)
- US AIR

If yes to "fly / drive", what car rental did you use?

- ALAMO
- AVIS (2)
- BUDGET (2)
- CABS
- CAN'T REMEMBER (2)
- **HERTZ (3)**
- **NATIONAL (3)**

Visitor Survey Findings and Responses

12. Including you, how many people went on the trip?

Adults:	Typical response = 2 Average number of adults = 2.67 Percentage of visitors traveling with adults only = 60.94%
Children:	Typical response = 1 to 3 Average number of children = 2.56 Percentage of visitors traveling with children = 39.06%

An important part of a visitor profile is the size of the group visiting an attraction or a destination.

The typical response in this study was a travel party size of 2 adults. Families traveling with children typically listed 1-3 children in their travel party.

Overall, 60.94% of respondents reported their travel party was comprised of only adults. Slightly less than two-fifths, or 39.06% of travel parties contained children. Nationally, Travel Industry of America (TIA) reports that family vacation travel accounted for 72% of all vacation trips in 1998. While this number differs with the South Padre Island research, an explanation can be found in the year round appeal of South Padre. The peak period for family vacations is the ten week period following memorial day. The remainder of the year is popular for adults traveling with children.

Thus, two distinct marketing approaches are confirmed by the research. The summer family vacation market is one of South Padre Island CVB's major markets and should continue to be targeted. Additionally, adults traveling without children are a significant contributor to year round visitation and should be targeted as such.

Visitor Survey Findings and Responses

13. Please estimate how much you spent during your last trip to South Padre Island, Texas:

Area	Highest amount	Lowest amount	Average amount
Lodging	\$1500.00	\$50.00	\$434.76
Food/meals	\$1200.00	\$40.00	\$264.81
Attractions/amusements	\$2000.00	\$30.00	\$216.82
Shopping	\$1500.00	\$20.00	\$182.96
Trans., fuel, airfare, etc.	\$3000.00	\$20.00	\$437.33
TOTAL	\$8200.00	\$150.00	\$1411.23

Knowledge of the spending habits of those who travel to South Padre Island and Port Isabel will benefit the South Padre Island CVB in projecting realistic revenue growth in the future. The above figures, when combined with the average length of stay information (question #8), provide insight into the economic impact that each travel party generates in a community.

As found in question #8, the average length of stay in the South Padre Island area is 4.00 nights. Therefore, dividing the average amount spent while in the area by the average number of nights determines the average daily expenses in each category. Using this formula, the typical travel party spent the following amounts each day:

<u>Category</u>	<u>Amount</u>	<u>% of whole</u>
1. Transportation/Fuel	\$ 109.33	28.46%
2. Lodging	\$ 108.69	28.29%
3. Food/Meals	\$ 66.20	17.23%
4. Attractions/Amusements	\$ 54.20	14.11%
5. Shopping	\$ 45.74	11.91%
Average Daily Expense	\$ 384.17	100.00%

The largest daily expense (28.46%) for travelers to South Padre Island and Port Isabel is transportation. The second highest expense (28.29%) is lodging. Third is food and meals (17.23%), attractions/amusements are rated fourth (14.11%). Lastly in fifth place is shopping (11.91%). RTM is accustomed to seeing the following rank of spending in other destinations: 1) lodging, 2) Food/Meals 3) Shopping, 4) Transportation, 5) Attractions. Transportation/Fuel ranked unusually high in this study due to the remote location of SPI. Most visitors to the island have already spent a significant amount of money before arriving on the island.

Visitor Survey Findings and Responses

13. (Continued)

The most unusual thing we see here is the shopping category. Shopping is identified nationally as the number one tourist activity. One will also see in the next question below that shopping is the number three tourist activity for visitors to South Padre Island after driving/sight seeing and beach activities. When we do find shopping to be the largest expenditure, we can be sure that the destination is taking maximum advantage of economic impact opportunities. Recent research data from the State of Texas shows that the number one activity for Mexican nationals visiting the United States is shopping.

The findings here indicate that the South Padre Island CVB needs to do more to promote shopping venues to visitors and to encourage development of more unique shopping opportunities for tourists. Greater economic impact from shopping and dining can be obtained by offering visitors a greater variety of shopping and dining on the island and targeting visitors with greater discretionary income for increased spending after arrival.

Therefore, South Padre Island and Port Isabel can have confidence in the level of average daily spending reported by visitors. Future marketing efforts should include an emphasis on the shopping highlights of the area as a reason to visit and extend the stay. Additionally, the South Padre Island CVB should encourage local businesses to develop more shopping opportunities for visitors to most effectively grow per visitor expenditures. The goal will be to increase average daily spending on shopping from \$45.74 in this study to \$100+ daily in the next five years.

Visitor Survey Findings and Responses

14. The following is a list of activities that people may do while visiting South Padre Island. Please circle all activities that at least one member of your travel party did while visiting.

(The TOP NINE activities are in bold.)

Driving / sightseeing	25.22%
Beach activities	24.35%
Shopping	23.48%
Day trip to Mexico	12.61%
Visit a museum	7.39%
Visit a state or national park	6.52%
Bird watching	6.09%
Visit an historic site	5.65%
Pier / surf fishing	5.22%
Boating	4.78%
Gulf / bay fishing excursion	4.78%
Other (specify)	4.35%
Miniature golf	3.04%
Visit a nature preserve	2.61%
Boating	2.61%
Attend a cultural event	2.17%
Biking	1.74%
Business	1.74%
Wind surfing	1.74%
Attend a festival / event	1.74%
Camping	1.30%
Golf	1.30%
Meeting / seminar	1.30%
Attend a sports event	0.87%

Activities listed as "other" included:

- CLUBING
- DINING
- DOLPHIN WATCHING
- EATING
- FOOD AT RESTAURANT
- HORSEBACK RIDING, MEMORIAL DAY FIREWORKS SHOW
- PARA-SAILING, CASINO BOAT TOUR
- SHELLING TRIP TO BOCA CHICA
- SWIMMING
- WE ARRIVED AT 6:30 IN THE EVE & LEFT AT 7:30 AM THE NEXT DAY

Visitor Survey Findings and Responses

14. (Cont'd)

In assessing the overall perceptions of product value, it is important to note the activities in which visitors participate. This also provides clues as to which marketing messages might be most successful. In other research studies conducted by RTM in the Southeast we find similar responses to the data presented here. Frequently mentioned activities in other similar studies include shopping, sightseeing and spending time in the downtown area.

According to RTM research and as documented by Travel Industry of America (TIA), activities participated in by U.S. resident travelers for 1998 included:

- Shopping (33%)
- Outdoor (camping, hiking, biking, etc.) (17%)
- Historical Sites/Museums (15%)
- Beaches (11%)
- Cultural Events/Festivals (10%)
- National/State Parks (9%)
- Theme/Amusement Parks (8%)
- Nightlife/Dancing (8%)
- Gambling (7%)
- Sports Event (6%)
- Golf/Tennis/Skiing (4%)

Additionally, TIA reports that visitors planned the following activities after arriving at their destination:

- Restaurant (48%)
- Shopping Area (45%)
- Museum or Exhibit (26%)
- Sightseeing Tour (24%)
- Movie (16%)
- Theme Park (15%)
- Religious Service (14%)
- Live Theatre or Other Performance (14%)
- Festival or Parade (13%)
- Other Activities/Attractions (24%)

The information learned in the South Padre Island study compares favorably with the data learned nationally and at the state level. *Thus, the South Padre Island CVB can have confidence that promotion of its sightseeing, beach activities, shopping, day trips to Mexico, state and national parks and bird watching will appeal to potential tourists.*

Visitor Survey Findings and Responses

15. Overall, on a 5-point scale (where 5 is Excellent, 3 is Average and 1 is Poor), how would you rate your last visit to South Padre Island, Texas?

5 (Excellent)	41.54%
4	46.15%
3 (Average)	12.31%
2	0.00%
1 (Poor)	0.00%
No response	71.74%
Average Rating = 4.29	

The rating of a visit to an attraction or a destination by visitors is useful in understanding if visitor expectations are being met by actual experiences. Further, it provides a clue to likelihood of return/repeat visits in the future. It is also a good measure of how well visitors will speak of South Padre Island to their friends and relatives.

It is important for South Padre Island and Port Isabel to realize that typically a visitor rates their vacation experiences highly. Vacations, perhaps even in foul weather or less-than-desirable conditions are still appreciated by visitors compared to their normal hectic lives. Therefore, one must look very critically at the ratings provided here.

RTM prefers to see a solid "A" (or upwards of a 4.5) rating for destinations. Ratings over this mark confirm for us that the destination or attraction is providing excellent value and is well positioned with expectations matching actual experiences. When we find ratings below the "A" or 4.29 mark, we see this as an indication that the value of the destination/attraction needs to be examined.

Thus, we can deduce that South Padre Island is not as well perceived as it could be but earns good ratings from its visitors. South Padre Island has an opportunity to increase the overall satisfaction of tourists. The following questions will help determine the areas of concern for the visitors that may have caused the lower than expected overall rating.

Visitor Survey Findings and Responses

16. What do you remember liking or disliking the most about your last trip to South Padre Island? (write in your answers)

Top Reported Likes

- **Accommodations (2)**
- **Condos (3)**
- **Hotel**
- **Nice Hotels**
- **Price Of Hotel**
- **Quality Of Hotels**
- **Resort**
- **Sea Grape Motel**
- **Beaches (23)**
- **Clean Beach (3)**
- **Uncrowded Beaches**
- **Walking On Beach**
- **Restaurants (6)**
- **Dining (Prices)**
- **Dinner At The Brewery**
- **Food / Eating (10)**
- **Seafood**
- **Weather (Warm) (7)**
- **A Couple Warm Days**
- **Not Enough Sun, Cloudy**
- **Birds**
- **Bungee For Kids**
- **Cab Fares (2)**
- **Cabo Was Perfect**
- **Casino Tour**
- **Christmas**
- **Clean (2)**
- **Dolphin Cruise**
- **Driving Around**
- **Enough To See/Do In Area**
- **Entertainment**
- **Everything (2)**
- **Fireworks - Night Life**
- **Fishing (5)**
- **Girls In Bikinis**
- **Gulf Coast**
- **Holiday Was Clean**
- **Lack Of Crowds**
- **Likes & Dislikes**
- **Location**
- **Nice Pools At Motel**
- **Not Too Crowded (2)**
- **Off Season, As Far As Fewer People**
- **Pelican, Dolphins, Peaceful Evenings**
- **People (Friendly) (13)**
- **Pretty Area**
- **Quiet**
- **Reasonable Prices**
- **Relaxed Atmosphere (4)**
- **Seclusion**
- **Shopping (2)**
- **Sight Seeing**
- **Surfing/Swimming**
- **Surprised At All The Condos & Hotels**
- **Swimming Pool**
- **The Over All Area**
- **Trip To Mexico (4)**
- **Water (2)**
- **Water Clean**
- **Water Was Cloudy Due To Previous Hurricane**
- **Wave (For Transportation)**
- **Welcome Center, Very Helpful**

Visitor Survey Findings and Responses

Top Reported Dislikes

- **Cold Weather** Last Day
- Couple **Cold/Rainy** Days
- **Humidity (3)**
- It **Rain** Most Of The Time
- The **Fog**
- **Tornado** Struck
- Weather (5)
- Buggy Rentals Were To **Expensive**
- **Expense**
- Lodging A Little **Expensive** For The Area I Felt
- **Not Enough Coupons** For Hotels, Rest.
- **Prices**
- Too **Expensive**
- Didn't Like The Set-Up To Rent Some Of The **Condos**, Had To Rent For 2 Months
- Don't Like Exterior Corridors At **Hotels**
- **Hotel (2)**
- **Hotel Food** McDonalds Didn't Open Til 8 Am
- Lack Of Major **Hotel** Chains E.G. Hilton, Marriott, Hampton Inn.
- Limited **Camping** Available
- **Motel** Shot To Hell Due To Kids Before Us
- **Room** Was To Damp. Our Clothes/Beachwear Never Dried In Room. Dehumidifiers Would Help.
- Sheraton **Hotel**
- Staff At **Hotel** Were Rude
- Lack Of Better **Shopping**
- More **Shopping**
- No **Malls**
- Not Many **Stores** To See That Where Open
- Too Many **Shops** Closed
- Certain Areas Of **Beach** Trashy
- Driving On **Beach** In Jeep
- No Warning Of The Jelly Fish At **Shore**, More Than Usual, We Heard
- Not The Best **Beaches**
- Trash On **Beach**
- A Lot Of Teenagers
- Cockroaches
- Convention Center Didn't Know Anything About State Parks In Area
- Crowds (2)
- Day Trip To Mexico
- **N/A (6)**
- No Fishing Going On
- No Helicopter Rides Available
- No Sailboat Rides Available
- Not Enough Recreations At Reasonable Prices
- Not Much Night Activity
- **Nothing (5)**
- Poor Mail Delivery
- Restaurants Closed
- Sand (3)
- Slow Season For Events
- The Long Trip There
- Traffic Was Hectic
- Unsightly Mess Around Building Sites

Knowledge of the characteristics or attributes which visitors liked and disliked about their visit is useful information in assessing product quality, to provide to local tourism entities for corrective measures and for developing new promotional messages.

Clearly, the beaches, weather and friendly people offer appeal to visitors. The dislikes primarily included weather, prices, lack of shopping variety and accommodations.

Visitor Survey Findings and Responses

17. Following is a list of attractions and events offered in the South Padre Island area. First, for each attraction or event, circle whether you have never heard of it (1), heard of it but didn't visit it (2), or visited it (3). Second, if you visited the attraction or event rate it from 5 to 1 on a five point scale where 5 is Excellent, 3 is Average and 1 is Poor.

Attractions	Never Heard of	Heard of Didn't Visit	Visited	Rating
South Padre Island Beaches	0.87%	1.74%	26.09%	4.19
Sea Turtle, Inc.	10.87%	11.30%	3.91%	4.00
Laguna Madre Nature Trail	10.43%	14.35%	1.30%	3.67
South Padre Island Golf Club	10.43%	11.74%	2.17%	3.60
Edwin K Atwood Park	15.65%	7.39%	0.87%	4.25
Andy Bowie Park	14.78%	6.52%	4.35%	4.20
Isla Blanca park	13.91%	6.09%	5.65%	3.91
South Padre Island Equestrian Center	7.39%	14.78%	3.91%	4.00
"Red Hot" Mexico Guided Day Tour	15.22%	6.52%	3.91%	4.29
"The Wave" Free Shuttle System	14.78%	9.57%	1.30%	4.67
Bay Fishing Charter	4.78%	18.26%	1.74%	4.25
Deep Sea (Gulf) Fishing Charter	3.91%	18.26%	3.48%	4.25
Dolphin Watch Eco Tour	6.52%	14.78%	3.48%	4.50
Whaling Wall	13.91%	9.13%	2.61%	4.17
Texas – Pan Am Coastal Studies Laboratory	13.91%	9.13%	1.74%	4.00
South Padre Island Convention Centre	1.74%	18.26%	5.22%	3.83
Regional				
Laguna Atascosa National Wildlife Refuge	8.26%	13.91%	1.74%	4.00
Port Isabel Lighthouse	3.48%	13.91%	8.26%	3.83
Port Isabel Historic Museum	6.52%	14.78%	4.35%	3.70
Treasures of the Gulf Museum (Port Isabel)	12.17%	10.00%	2.61%	4.00
Matamoros, Mexico	2.61%	12.17%	11.74%	3.36
Nuevo Progreso, Mexico	7.83%	11.30%	6.96%	3.46
Gladys Porter Zoo, Brownsville	6.09%	16.96%	2.17%	4.75
Marine Mil. Acad. Iwo Jima Memorial (Harlingen)	11.30%	9.57%	4.35%	4.30
Events				
Ladies Kingfish Tournament	17.83%	6.09%	0.43%	4.00
Spring Break	3.04%	18.26%	3.04%	3.67
Texas International Fishing Tournament	14.35%	9.57%	0.43%	5.00
Windsurfing Blowout	15.65%	7.83%	0.43%	4.00
Other event (specify)	1.74%	0.43%	2.61%	4.50

Visitor Survey Findings and Responses

17. (Cont'd)

Activities listed as "other" included:

- NEW YEARS EVE
- PARASAILING
- SENIOR GAMES
- SURFING
- VACATION

Awareness level, compared to the percentage of attendance and the rating of each attraction and event tells us a great deal about how visitors appreciate these individual attractions and events. It also provides critical clues for the most effective positioning for the South Padre Island CVB.

In analyzing this data one wants to see a relatively high awareness level. Visitation percentages tell us how much appeal the attraction currently enjoys among visitors. Here we want to see a percentage in high proportion to the awareness level. Otherwise one might conclude that although the visitor is aware of the product, they are not compelled to visit, or perhaps the event/attraction is not available when they visit. Finally, one wants to note the rating of the attraction/event. This provides clues as to the perceived quality of the experience and whether an individual attraction/event may or may not be of critical importance for the majority of visitors. RTM looks for an overall rating of over 4.5 or "A" grade in determining high product quality.

Clearly, the research shows that the South Padre Island Beaches are the main attraction to visitors visiting the island. The beaches have a visitation level of 26.09%, an awareness level of 27.83% and an overall rating of 4.19. Other areas of interest include:

- Trips to Mexico (Matamoras and Nuevo Progreso, Mexico and the "Red Hot" Mexico Guided Day Tour)
- Port Isabel Activities (Port Isabel Lighthouse, Historic Museum and the Treasures of the Gulf Museum)
- South Padre Island Parks (Isla Blanca andy Bowie and Edwin K Atwood Parks)
- Nature Tourism Activities (Sea Turtle, Inc., South Padre Island Equestrian Center, Dolphin Watch Eco Tour, Whaling Wall, Gladys Porter Zoo, Laguna Atascosa National Wildlife Refuge and Laguna Madre Nature Trail)

Visitor Survey Findings and Responses

17. (Cont'd)

One trend that caught our attention is the large number of sites and attractions that have high awareness levels but a low attendance levels and relatively low satisfaction ratings. This might mean that many of these activities are unavailable during primary visitation times. Since such a small percentage of visitors actually visited these attractions/activities, the ratings might be a little suspect.

Please note that we do not typically rate annual events as offering top appeal because they offer only a limited time economic impact. For instance Augusta, GA may be well known for the Masters golf event, but it can't be counted upon for overall year round economic impact.

Visitor Survey Findings and Responses

18. What type of activities would you participate in if offered in South Padre Island, Texas? (circle the number of ALL that interest you).

The TOP FIVE responses are in bold.

Guided tours of coastal scenery and history	67.39%
Shows / concerts / music	66.52%
Guided nature tour of birds, plants & wildlife	60.43%
Shopping excursions to nearby malls	50.00%
Large scale birding center similar to a large aquarium	38.70%
Cinema / draft house	31.74%
Indoor extreme sports arena	12.61%
Day camp for children	9.13%

Knowing the unmet needs or types of attractions/events/activities, which will draw visitors to an area is powerful information for South Padre Island to use in economic development and tourism product enhancement efforts. The top five attractions and activities that tourists would like to see added in South Padre Island are identified above.

One should note the very high percentages of appeal for the top five items identified in this question. Anything rated over a 40% mark is considered extremely attractive to visitors.

Thus, strategic development and placement of these activities in South Padre Island and Port Isabel will most likely result in increased visitor appeal.

Visitor Survey Findings and Responses

19. Are you planning to visit South Padre Island in the next year?

Yes	67.76%
No	32.24%
No response	6.96%

If Yes, what month(s) do you plan to visit? (circle the number of each month you plan to visit)

Jan	5.65%
Feb	9.13%
Mar	5.22%
Apr	5.22%
May	9.13%
Jun	17.39%
Jul	11.74%
Aug	10.00%
Sept	7.83%
Oct	8.26%
Nov	6.96%
Dec	3.48%
No response	39.13%

Approximately two-thirds (67.76%) of visitors report they plan to visit South Padre Island within the next year. 32.24% indicate they will not. RTM looks to this data to indicate overall satisfaction with the visit and for a commentary as to whether the product offering is broad enough to warrant repeat visitation. A 68% positive response is good. However, RTM prefers to see an affirmative response to this question in the range of 75% or higher. Again, this indicates to us the ideal satisfaction level with the product.

The months reported as most likely for repeat visits include June, July, August, May and February and the months of December, March and April being less likely. This is similar to patterns we normally find in coastal areas. This also represents an opportunity to inform current visitors regarding reasons to come back during the identified target months.

Visitor Survey Findings and Responses

Demographics

Demographics are the descriptive statistics dealing with a specific population of people. The demographics of visitors are excellent descriptions of the markets that are visiting an attraction or destination. The demographics of the sample of respondents who requested information about South Padre Island are described in the following information.

20. Education? (circle one)

Grade school	0.44%
Some High School	1.33%
High School Graduate	17.33%
Technical School	4.00%
Some College	27.11%
College Degree	28.00%
Graduate School	18.67%
Other (specify)	3.11%

Listed as "other":

2 GRAD DEGREE
DOCTORATE
GARY JOB CORPS, SUN MARCOS
GED
PHD EE
STARTING COLLEGE IN AUGUST

The largest percentage of respondents reported having a college degree (28.00%), or having some college (27.11%) followed by those attending graduate school (18.67%). In general, the respondents were fairly well educated which is typical of the traveling public.

21. What is your age and gender?

Ages range from 18 to 81. Average = 46.05.
Males comprised 35.84% of respondents; females 64.16%.

Just under two-thirds (64.16%) of respondents were female while slightly more than one-third (35.84%) were male. Typically RTM finds more female trip planning decision-makers than male.

The average age of respondents is 46.05 years. This also matches data for other similar coastal areas

Visitor Survey Findings and Responses

22. What is your occupation? (specify) The TOP NINE responses are in bold.

- | | | |
|--|---|--|
| <ul style="list-style-type: none"> • Account Clerk (2) • Accountant (2) • Acct Representative • Admin. Asst. (2) • Administrative Professional • Advertising Account Executive • Advertising/Homemaker • Architect • Assistant Account Exec • Assistant Superintendent - HR • Attorney • Auditor - Bank • Teller Manager, Bank Of America • Bank VP • Bookkeeper • Business Consultant • Carpenter • Cashier • Central Office Translation Specialist • City Water Plant Operator • Clerical (2) • Coach Driver • College Administrator • Comptroler • Consultant • Correction Supv • Correctional Officer At Prison • Counselor • Data Entry, Clerical • Dental Assistant • Director • Disabled • Doctor (4) • Domestic Engineer • Domestic Goddess • Education Admin • Educator (2) • Election Coordinator • Engineer (3) • Escrow Office - State Of Texas • Executive Director Of Housing Corp. • Facilities Maint. • Factory Worker • Farmer • Fire Fighter/Security Officer • Food Service Manager • General Manager (2) | <ul style="list-style-type: none"> • Graduate Student/Research Scientist • Hairdresser (2) • Home Health Nurse (2) • Home Maker / Housewife (12) • Hotel Industry • Hr Administrator • Information Systems Manager • Inspector • Insurance Agent (3) • Inventory Coordinator • Lab Assistant • Logistics & Planning Analyst • LYN • Machine Repairman/Machinist • Maintenance Supervisor • Manager (4) • Master Gardener • Math Instructor • Medical Technologist, Blood Bank • Medical Transcriptionist/Children's Author • Mental Health, Mental Retardation Residential Sup. • Mill Worker • Network Technical Assistant • None • Nurse (7) • Occupational Therapist • Office Manager (4) • Oil Field Supervisor • Oiler/Greaser (Maintenance) • Operate Computer In Accountant Business • Operations Manager • Parts Clerk At Auto Dealership • Personal Assistant To President Of Ridgmar Travel • Photographer • Police Officer • Printing Manager • Professional • R & Development • Radiographer/Letter Carrier • Radiological Technologist | <ul style="list-style-type: none"> • Real Estate Sales Secretary • Realtor • Recreation Supervisor • Registered Dental Assistant • Restaurant Owner • Retail Sales Assistant • Retired (42) • Rural Mail Carrier, Us Post Office • Sales (3) • Sales Manager, Olathe Convention & Vistors Bureau • Sales Representative For Risograph • Salon Coordanitor / Manager (3) • School Administrator • Secretary (3) • Security Monitor • Security Officer • Self Employed (6) • Semi-Retired • Senior Engineer • Service Co-Ord. • Sewing At Home • Shareholder Accts. Rep. • Social Worker (3) • Student (4) • Supervisor/City Of Plano Maintance Dept • Teacher (7) • Teleorder Coorespondent • Travel Agency Owner • Travel Agent • Truck Driver • Unemployed • Web Coordinator/Staff Writer • Work At A Jail • Working Mom • Writer/Editor • X-Ray Tech |
|--|---|--|

The data reported here tends to match what we find for other similar areas.

Visitor Survey Findings and Responses

23. What is your home zip code?

Texas - 82 (35.81%)	Brainerd	Lafayette	Tennessee - 4 (1.75%)
Arlington (3)	Detroit Lakes	Lake Charles	Memphis
Austin (7)	Fairmont	Mandeville	Old Hickory
Bedford	Lakeville	Metairie	Oldfort
Belton	Lino Lakes	Pineville	Smyrna
Brownsville (2)	Mahtomedi	Shreveport	Iowa - 3 (1.31%)
Buda	Mountain Lake	Wisconsin - 8 (3.49%)	Anamosa
Caddo Mills	Nerstrand	Appleton	Manly
Carrollton	Owatonna	Cedarburg	Pella
Center	Rochester	Custer	Nebraska - 3 (1.31%)
Chandler	Saint Paul	Greenleaf	Gibbon
Channelview	Waite Park (2)	Hayward	Omaha
Columbus	Wilder	Horicon	Tecumseh
Comanche	Illinois - 14 (6.11%)	Lodi	Arizona - 2 (0.87%)
Copperas Cove	Belleville	Webster	Casa Grande
Corpus Christi	Carbondale	Missouri - 7 (3.06%)	Prescott Valley
Corsicana	Carol Stream	Collins	Colorado - 2 (0.87%)
Dallas (5)	Chicago (3)	High Hill	Glenwood Springs
Deer Park	Crystal Lake	Kansas City	Roggen
Denton	Edwardsville	Lees Summit	Georgia - 2 (0.87%)
Euless	Harvard	Saint Louis	Savannah
Flower Mound	Marquette Heights	Saint Peters	Villa Rica
Fort Worth	Mc Henry	Wentzville	Mississippi - 2 (0.87%)
Freeport	Oglesby	Alabama - 5 (2.18%)	Greenville
Garland (2)	Springfield	Bessemer	Mendenhall
Goldthwaite	Woosung	Double Springs	Montana - 2 (0.87%)
Grand Prairie (2)	Michigan - 10 (4.37%)	Horton	Bozeman
Haltom City	Bellaire	Huntsville	Missoula
Houston (7)	Clinton Twp	Tuscaloosa	Pennsylvania - 2 (0.87%)
Idalou	Dearborn	Florida - 5 (2.18%)	Elkins Park
Keller	Kalamazoo (2)	Bradenton	Pittsburgh
Kingwood	Kimball Township	Davenport	South Dakota - 2 (0.87%)
Lake Worth	Kingsley	Gainesville (2)	Rapid City
Laredo	Northville	Lake Wales	Sioux Falls
Lewisville	Oxford	Kansas - 5 (2.18%)	Virginia - 2 (0.87%)
Lovelady	Roseville	Hays	Roanoke
Lubbock	Oklahoma - 10 (4.37%)	Kansas City	Springfield
Lufkin	Broken Arrow (2)	Olathe	AE - 1 (0.44%)
Mc Gregor	Bromide	Topeka	Apo
Midland	Enid	Wichita	Connecticut - 1 (0.44%)
Pearland	Oklahoma City (2)	Kentucky - 5 (2.18%)	Branford
Plano	Sand Springs	Lawrenceburg	DC - 1 (0.44%)
Powderly	Tahlequah	Louisville (2)	Washington
Richmond	Tulsa (2)	Richmond	Maryland - 1 (0.44%)
Rockdale	Ohio - 9 (3.93%)	Sadieville	Columbia
Rockwall	California	New Mexico - 5 (2.18%)	North Carolina - 1 (0.44%)
Round Rock	Centerville	Belen	New Bern
San Angelo (2)	Delphos	Hobbs	North Dakota - 1 (0.44%)
San Antonio (8)	Hicksville	Las Cruces	Bismarck
Santa Fe	Mount Vernon	Roswell	New Hampshire - 1 (0.44%)
Schertz	Port Clinton	Tijeras	Hooksett
Schulenburg	Ravenna	Indiana - 4 (1.75%)	New Jersey - 1 (0.44%)
Sweeny	Troy	Muncie	Toms River
Waller	West Carrollton	Richmond	New York - 1 (0.44%)
Minnesota - 16 (6.99%)	Louisiana - 8 (3.49%)	Terre Haute	Rye
Arden Hills	Anacoco	Winchester	South Carolina - 1 (0.44%)
Beardsley	Fort Polk		North Charleston

Visitor Survey Findings and Responses

24. Which category is closest to your total family income? (Circle one)

Less than \$20,000	6.28%
\$20,000 - \$39,999	18.36%
\$40,000 - \$59,999	29.47%
\$60,000 - \$79,999	19.32%
\$80,000 - \$99,999	12.56%
\$100,000 - \$119,999	6.28%
\$120,000 - \$139,999	3.38%
\$140,000 +	4.35%
No response	10.00%

The income reported by these respondents reflects their relatively high education level and matches the findings from state research.

25. In your opinion, what source of information most influences your travel decisions? Please rate the following on a five-point scale where 1 reflects no influence and 5 reflects a major influence. (Please circle the appropriate number next to each category.) The TOP FIVE responses are in bold.

Advertising – Magazines	3.41
Brochures in Welcome Centers	3.37
Friends and Relatives	3.35
Advertising – Newspapers	2.91
Internet	2.90
Advertising – Television	2.87
Other	2.47
Travel Agent	2.29
Advertising – Radio	2.18

The responses here match what we find in state and national data. Also see Travel Industry of America (TIA) data under question #7 in this document.

Visitor Survey Findings and Responses

26. What is your favorite magazine? (specify)

Southern Living (16)	Ebony	Parents (2)
Readers Digest (11)	Endless Vacation (RCI)	Pc World
Texas Monthly (11)	Entertainment	Peterson's Hunting
People (10)	Family Circle (2)	Phoenix Home & Garden
National Geographic (7)	Family Fun (2)	Playboy
Better Homes & Gardens (5)	Family Homeowner	Popular Mechanics (3)
Good Housekeeping (5)	Frommers Travel	Progressive Farmer
Texas Highways (5)	George	Real Simple (2)
Cosmopolitan (4)	Guide Posts	Redbook (2)
News Week (4)	Guns & Ammo	Rifleman
Oprah (4)	Handyman	RV
Time (4)	Health (2)	Saturday Evening Post
Travel (4)	Health Unlimited	Selecciones
50 & Beyond	Home & Garden (2)	Shape
AAA	Home Improvement	Shutterbug
AAA Home & Away (2)	Home Remodeling & Decorating	Smithsonian
AAA Travel (2)	Hot Rod	Sports Illustrated (3)
American History	Hustler	Sunset (3)
Aviation	In Style	Talk
Big D	Intelligent Enterprise (Computer),	Taste Of Home (2)
Biography	DBS	Texas Parks & Wildlife
Birds & Blooms	Interview	The Artist
Bob Appetit	Islands (2)	The New Yorker
Business Week	Jet (2)	This Old House
Car Mag	Kiplingers	Travel Holiday (2)
Club International	Lapidary Journal	Traveler Life
Coast To Coast	LHJ	Triathlete
Coastal Living (2)	Lighthouse Digest	Tropical Fish
Collectors Digest	Martha Stewart Living (2)	TV Guide
Computer	Men's Health	TX Fish & Game
Conde Nast Traveler (3)	Midwest Living	TX Parks & Wildlife (2)
Consumer Report	MM (New Title)	US News & World Report (3)
Cooking Light, Mademoiselle	Modern Maturity (2)	Variety Fair
Country Gardens	Money (3)	Woman's World
Country Living (2)	Mother Earth News	Women's Day
Country Woman	N/A (2)	Wood
Crafting	National Geographic Traveler (2)	
Creating Keepsakes	Nevada	
Discover	None (2)	
Discover Oklahoma	Outdoor Photography	

Marketing Objectives

Based on the consumer research conducted for the South Padre Island CVB, these are the objectives recommended for tourism growth:

1. Increase Occupancy 8% Annually

The objective is for a steady 8% increase in tourism occupancy collections each year once the new positioning and advertising outreach are in place. According to the statistics obtained for this report in the State of Texas grew their statewide tourism volume by 7% in 1999, and has increased an average of 6.1% since 1990. This is slightly higher than the U.S. average of 4.9%. Also, the state reports that travel spending in South Padre Island has increased an average of 4.53% annually since 1994. The latest state figures show a 5% increase in 2000 over 1999. RTM recommends establishing the 8% annual goal based on anticipated success in positioning and marketing efforts, as well as expected growth in the area from new lodging and related facilities.

2. Increase Satisfaction of Visitors

Increase overall satisfaction with a visit to South Padre Island and Port Isabel. Currently visitors report an average overall trip satisfaction rating of 4.29 or the lower end of an "A" grade. RTM recommends increasing satisfaction to a more solid "A" grade (a 4.5 or higher on a 1 to 5 scale where 1=low and 5=high).

3. Increase Repeat Visitation

Increase repeat visitation or brand loyalty. Currently slightly over two-thirds (67.76%) of visitors report they do plan to return. RTM prefers to see this rated at 75.0% or above. However, one must realize that we are actually measuring their *intent* to return.

4. Increase Daily Per-Visitor Expenditures

Objective is to increase daily per-visitor expenditures for food/meals and attractions 8.0% above the current research identified spending estimates. This would be monitored and measured in follow up studies. Within a five-year period, daily per-visitor expenditures should increase to at least \$100 per day.

<u>Average Daily Spending by Category</u>	<u>Amount</u>	<u>% of Total</u>
1. Transportation (fuel, airfare, etc.)	\$109.33	28.46%
2. Lodging	\$108.69	28.29%
3. Food/meals	\$66.20	17.23%
4. Attractions/amusements	\$54.20	14.11%
5. Shopping	\$45.74	11.91%
Average Daily Expense	\$384.17	100.00%

Target Audiences

Based on the research documented for this study, the South Padre Island Convention and Visitors Bureau needs to focus its marketing efforts on the following audiences for tourism growth:

1. Primary Leisure Demographic Target Market:

- Average age: 46 years
- Adults (about 2/3 females, 1/3 males)
- Education: professional with some college education up through graduate school
- Income target: \$40,000+
- Typical travel party size = 2 adults (60.94% of market)

2. Primary Leisure Geographic Target Markets:

Texas (35.81% of total visitation)

- Houston
- Dallas-Fort Worth
- Austin
- San Antonio
- Corpus Christi

Minnesota

Illinois

Michigan

Oklahoma

Iowa

Mexico (via travel agencies)

- Monterrey
- Saltillo
- Ciudad Victoria
- Tampico
- Mexico City
- Upscale residents of relatively close border towns (Matamoros, Reynosa, Nuevo Laredo)

3. Business Travelers

4. Corporate Meeting Planners

5. Convention and Meeting Planners (to match existing and planned facilities)

6. Group Tour Planners and Group Leaders

7. Local Residents

- Family reunions
- Weddings
- VFRs (visiting friends and relatives)

Strategic Direction

RTM recommends a strategic marketing direction for the South Padre Island Convention and Visitors Bureau that includes:

1. *Establish a long-range vision for the future of South Padre Island and the Port Isabel area:* South Padre Island and Port Isabel must ensure economic well being by establishing a long-range plan for continued growth and management of tourism for the next twenty years. This plan should comprehensively include land use, business mix, and tourism product/infrastructure needs. It should include short-term initiatives and long-range visioning. This strategic vision process needs to be a joint effort by the CVB, the EDC, and the towns of South Padre Island and Port Isabel. It is *not* appropriate that the CVB pay for this effort. The critical nature of this project warrants the investment by primarily the two town jurisdictions. Also, this plan needs to outline exactly what types of businesses are needed (adding high-end retail and lodging for example) in a staged growth approach.
2. *Improve the curb appeal and visual attractiveness of South Padre Island:* South Padre Island must work now to improve its visual appeal, and continue working to maintain a resort-quality visual appeal. This means planning should be implemented to steadily move the Island to looking more like a Hilton Head, SC type of environment (lush landscaping, signage systems, architectural design requirements, etc.) rather than what it is today. This is critical to keep the market moving upscale rather than down-trending to a lower socio-economic visitor market.
3. *Grow per-visitor expenditures and resulting tax revenues by increasing desired retail opportunities.* Shopping is documented to be the number one visitor activity in both Mexico and the U.S. Yet it is the *lowest* expenditure category for visitors to South Padre Island. Clearly the Island is losing valuable sales and tax revenues by not providing the desired product to its visitors. Thus, recruiting high end shopping is definitely recommended for South Padre Island and Port Isabel.
4. *Establish research-based positioning that promotes the compelling features that drive visitation.* Visitors love the South Padre Island and Port Isabel area. They clearly report the top distinctive features as being the beach, the warm "tropical" weather, the nature attributes, and the affordability. They enjoy staying in South Padre Island for shopping (both on the Island and in Port Isabel), dining, access to the beach, and having a relatively uncrowded, nature-rich setting.

Marketing Strategies

4. (Cont'd)

Together these features need to form the positioning or branding foundation upon which all marketing efforts are based. All marketing materials need to focus on the primary attractors, their linkage, and engage the visitor in trip planning.

5. *Align CVB efforts to actual market mix:* The CVB needs to align its marketing and promotional efforts to focus on those markets most likely to provide high return on investment while strategically targeting markets for growth. In analysis conducted for this study, it appears the most likely current business mix is as follows:

66% = Leisure

12% = Visiting friends & relatives

9% = Convention and meetings

6% = Business/corporate

5% = Group

6. *Add onto the existing Convention Center and create a leisure nature-based facility that links to the planned wetlands/nature center:* Convention Center marketing will always be a challenge for SPICVB. To best maximize the community's investment in this center RTM recommends maintaining the existing facility and adding on a leisure component (perhaps an extension of the nature trail and an interior nature interpretive center) that matches the nature-based positioning recommended for SPI. This will allow more revenue to be generated from the adapted facility and more long-term economic benefit and appeal to leisure markets.
7. *Focus marketing efforts on ideal target markets for growth:*
- Families in Texas and mid-west
 - Affluent Mexican families
 - Naturalists
 - Winter Texans
8. *Support development of new upscale lodging for increased revenues.* Leisure visitors, industry leaders, and meeting planners report the need for more upscale lodging in the South Padre Island/Port Isabel area. Development of a new upscale full-service lodging and meeting facility near the convention center should be supported. The CVB needs to be proactive in working with this new facility in recruitment of potential meeting planners. Additional upscale lodging is recommended as a part of the long-term plan.

Marketing Strategies

9. *Develop new attractions as indicated in "unmet needs" of research:* Research conducted in this study has identified potential new tourism products that are most likely to be successful. The CVB, EDC and Chamber need to work in partnership to provide community leadership in driving development of these new attractions. Additionally, focusing attention on these needs is suggested as a part of the earlier recommended long-range plan. Specifically these include:
- *More upscale retail shopping*
 - *Guided tours of coastal scenery & history*
 - *Nighttime entertainment*
 - *Guided tours of wildlife*
10. *Airport/airline partnership strategy:* 3 nights is the most frequently reported length of stay by visitors to South Padre Island. Thus, it will be of critical importance for South Padre Island and Port Isabel to continually build its relationship with regional airports and the airlines serving those airports. The isolated location of South Padre Island means that visitors will either face long drives or must fly into the area. With "time poverty" growing for all U.S. visitors, and weekend getaways now comprising approximately 50% of all North American vacations, quick access to the Island is critical in order to continue growing visitation.

Summary

As documented in research, the South Padre Island area offers strong, unique appeal to its current markets. This is evidenced in both the strong conversion ratio (34.76%) and a high visit satisfaction rating (A- grade) visitors report.

Visitors clearly like the beautiful beach, the warm tropical year-round weather, the nature-based setting, and the affordability of South Padre Island and Port Isabel. Compromising any of these attributes would be detrimental to the long-term economic health of the Island.

Leisure visitors are the majority of the market mix (66%) with significantly smaller percentages for visiting friends and relatives, conventions and meetings, business, and group segments.

Visitor expenditures fall into an appropriately healthy range for the categories of lodging, food, attractions, and transportation. Expenditures are significantly *below expectations* for retail expenditures. Providing opportunities for upscale retail purchases should correct this situation.

The community leaders and residents of South Padre Island need to clearly understand that they live in a tourism dependent economy. Thus, RTM recommends SPI commit to establishing a long-range plan including land use and product mix. Further, it is recommended that this plan include short-term initiatives and long-term visioning (suggest 20-30 years). Great changes will take place in consumer demand over the next 20 years. South Padre Island can not afford to ignore the expected market changes and prepare itself accordingly.

Continued financial health can be ensured for the South Padre Island/Port Isabel area. Tourism revenues can grow to create stronger economic impact for the community with 1) a committed long-range plan for land use and product development 2) positioning based on the clear positioning, 3) investment in strategically targeted marketing efforts and 4) focus on improved product offering.

Recommended Strategies

Based upon research conducted for this project, Randall Travel Marketing recommends the strategies identified below:

- Priority target audiences
- Positioning
- Development of appropriate marketing outreach materials
- Gateways, signage and visitor information centers
- Promotional efforts
- Direct sales efforts
- Organizational structure
- Funding for tourism promotion
- Product development potentials
- Local education and hospitality training
- Other RTM Recommendations
- On-going evaluation methods

Priority Target Audiences

RTM recommends the following priorities for target audiences:

A. Increase recruitment of families from major Texas markets, mid-west U.S. and affluent Mexican geographic markets:

Executive interview findings as well as research results indicate these are the most lucrative leisure markets for South Padre Island/Port Isabel marketing efforts. Respondents in the executive interview segment of this report particularly were outspoken about the need to “drive up the market” and continue to build appeal in the family market. There was significant sentiment that the CVB could do more marketing to this audience if it were to cut down on other segments, especially the Spring Break segment. The messages that appeal most to the family market include the tropical weather, the beaches, the relaxing nature of the South Padre Island area, and its affordability. For Texans, “the best beach in Texas” is also a believable and motivating message.

Marketing Strategies

B. Increase recruitment of birders and naturalists:

This audience was identified in both the surveys, the intercepts, and in executive interviews as being a preferred market. It is felt that visitors in this segment are good spenders, are likely to visit during advantageous shoulder season times, and are ideal targets for marketing. It is also felt that there is generally a low awareness level among this market regarding South Padre Island and the Lower Laguna Madre area. Thus, it is hoped that significant growth can be achieved by more aggressive targeting of this special niche. The birders and naturalists RTM interviewed for this study were very pleased with SPI and the Eastern Rio Grande Valley and its wildlife opportunities. The world-class nature of the birding is the primary appeal. Thus, this is the message that RTM recommends for marketing to this audience.

C. Increase recruitment of Winter Texans (middle mid-west and northern mid-west):

This is a high priority market for most businesses in the South Padre Island/Port Isabel area. This area is dependent upon this audience for off-season tourism business. Fortunately, in the intercept interviews and phone interviews conducted in this study, this market is favorably inclined to visit South Padre Island/Port Isabel. The most appealing aspect of the area for this audience is the tropical weather, the beach, the relative uncrowdedness and the affordability of the Island and Port Isabel. Thus, these are the message components that will work best to motivate this market. Other destinations considered by this market most often included Florida. The reason they choose South Padre Island over Florida is documented as being due to the tropical weather, the relative uncrowdedness, and the affordability compared to Florida.

D. Maintain Spring Break – but do not increase marketing outreach:

Although some businesses are dependent upon the Spring Break audience, it is felt by the majority of respondents in the executive interview portion of this study that this audience has a very high awareness level of South Padre Island. In intercept interviews conducted in March of 2001, the vast majority of respondents found out about South Padre Island through recommendations from friends and family or they “already knew” about the area or had visited previously. RTM documented few conversions from advertising placement in this audience. This is not to say that this audience should be dropped, but we do feel it is appropriate to examine the overall marketing effort for this segment, perhaps utilizing more in promotions and public relations and experiment with reallocating a portion of these funds into other audiences. A different kind of “wildlife” message works to attract this audience, as well as the beach, the tropical weather, and the affordability of the Island.

Marketing Strategies

E. Maintain recruitment of convention and meetings but shift some resources into more leisure marketing:

It is important to note that conventions and meetings comprise approximately 9% of the overall lodging occupancy at South Padre Island. However, the South Padre Island CVB cannot reduce its outreach priority to this market significantly without losing ground in this very competitive market. Thus, this will always be one market that is worked out of proportion to the result it generates. For long-term economic health, it is a crucial that the CVB continually improve upon its marketing skill in attracting conventions and meetings. However, the CVB needs to be mindful in carefully examining the resources it allocates to convention/meeting recruitment. RTM encourages the CVB to work toward reallocating resources to the more lucrative leisure market.

F. Group and motorcoach:

There are few motorcoach visits to South Padre Island at the current time. However, lodging contacts report that groups comprise 5% of their total overall business. Thus, having materials and outreach to the group market is important. As with the convention and meetings segment discussed above, RTM recommends maintaining outreach materials and resources allocated to marketing for motorcoach and groups while diligently striving to focus on those group audiences that would be likely to visit SPI. For instance, in the next few years it would be wise to invest in attracting Texas bank clubs and senior groups as this segment would likely find the beautiful beaches and value prices of SPI to be attractive. Similarly, it would be wise to co-market with other Rio Valley communities concerning attraction of nature enthusiasts to the World Birding Center. Birding tour groups would likely find the attractive beaches appealing compared to other Rio Valley overnight locations.

Positioning

Recommended Positioning Strategy

South Padre Island's current positioning is "South Padre Island – Where Texans Kick Their Boots Off." In a few cases the CVB also uses "The Tropic of Texas" positioning.

RTM recommends more clearly showcasing the distinct features that offer the most appeal for visitors to South Padre Island.

Additionally, this research report confirms that the most frequently reported length of stay in South Padre Island is 3 nights. The typical travel party is comprised of adults. Slightly less than three-fifths (60.94%) of the parties who overnight are adults traveling without children and slightly less than two-fifths (39.06%) do have children. Therefore, we need a positioning statement that appeals to adults traveling without children, but also vacationing families.

The positioning statement Randall Travel Marketing recommends for increasing tourism in South Padre Island is:

South Padre Island The Tropical Beach of Texas

Year-round warm weather, sunny beaches, and internationally renowned birding and wildlife invite you to the unpretentious, affordable relaxation of a south Texas beach vacation.

This positioning statement captures the essence of travel to South Padre Island. It combines a top message visitors respond to with the documented primary features for the area (beach, tropical weather, nature activities, and affordability). It clearly focuses primarily on the top "attractors" that drive visitation. It works for adults traveling without children and for families. It is believable and motivational. Most importantly, it also slightly broadens the appeal from the previously used positioning statement.

This positioning statement would be used in all promotional efforts. This would be used on the front of the primary marketing brochure, print ads, web site and other marketing outreach materials.

Marketing and Outreach

1. Primary positioning focus for all marketing and promotional materials

The South Padre Island Convention and Visitors Bureau needs to capitalize effectively upon its primary “attractors” including those things that are most appreciated by visitors, and use these to compel visitation, extend visitor stays and increase frequency of repeat visits. Promotional efforts for the area need to be refocused on these primary “attractors.” Many destinations make the mistake of trying to promote all attractions and amenities equally. Otherwise, they are perceived to be treating each entity unfairly. However, allowing this “political correctness” to set the policy for promotion often costs the destination revenues. By giving the potential tourist clear, succinct and compelling reasons to choose this destination over another, one wins the visitor and the resulting expenditures.

In this study, the core attractors that appeal to visitors have been identified for the South Padre Island. These are the elements that most likely lead the visitor to visit South Padre Island.

Remember that the tourist does not know where local city and county boundaries are located. During this study we found people speaking of attractions in the overall region as all being part of South Padre Island. While visiting “South Padre Island” they will visit many places, perhaps in other cities and communities as well as other counties. Erase the lines and focus on gaining maximum economic impact for the area by promoting those things that the research has identified as having the greatest tourist appeal.

Additionally, the South Padre Island CVB needs to develop suggested itineraries around its tourism products to inform the potential visitor that there is more here than they can do in a quick day trip or one night stay.

2. Refocused marketing materials and efforts

The marketing materials (brochures, ads, press releases, etc.) for the South Padre Island CVB need to be redesigned and refocused based on research findings and the recommended positioning statement. The research identifies the message that the traveling public wants to hear. A consistent image must be maintained in all of the marketing materials so that they all work together.

3. Design primary brochures to include a “lure” piece (or rack brochure) and a fulfillment piece (or visitor guide)

When asked, “What sources of information most influenced your travel decision?” one of the top responses in this study was “South Padre Island Brochure.” RTM consistently finds the visitor brochures and materials produced by the local CVB to be a critical factor in generating visitation. Thus, printed brochures are critical to the marketing effort for the South Padre Island area.

RTM recommends that two brochures be developed: a lure piece (or rack brochure) and a fulfillment piece (or visitor guide). This allows the South Padre Island CVB to print the maximum number of overall pieces at the greatest cost efficiency and to use these tools to their best value.

The lure piece/rack brochure would be distributed in visitor contact points far and wide as budget allows. Potential visitors find this brochure in state welcome centers and distribution points outside the immediate area. The lure piece/rack brochure is simply an abbreviated version of the more comprehensive visitors guide.

RTM recommends new, correctly positioned and compelling brochures be developed. It is critical that both brochures contain the following:

- **“Hook” on the top, front one-third page of brochure.** This is the hook that will generate interest. This must be based on the positioning statement adopted by the South Padre Island CVB.
- **Emotional connection.** The next step for this brochure is to create an emotional connection that places the reader in the experience of visiting South Padre Island. This emotional connection appeals to the senses and speaks of the sights, sounds, relaxing and fun experiences one can enjoy in the area.
- **“Must Sees.”** The next critical factor is to tell the potential visitor specifically the unique attractions and experiences they will find. This tells the visitor why they should stay here as opposed to other areas.
- **Suggested itineraries.** It is critical to help the visitor facilitate their trip. Suggested itineraries do just that. It helps the visitor plan their time most effectively and understand how to best enjoy the area.

Marketing Strategies

3. (Cont'd)

- **Listing of attractions.** Beyond the “must sees,” visitors need to know all the attractions they may enjoy. This is an actual listing that provides the detail visitors need in order to plan a trip. It would inform the visitor about driving directions, hours of operation, costs and contact information. Be sure to include *all* the details research has identified as being needed by visitors.
- **Listing of hotels and amenities.** Next in the trip facilitation process is helping the visitor choose overnight lodging. This should be presented in a full informational format, indicating services and amenities for each property. Tourists report to us they prefer to have photos of each lodging property (if possible) in addition to the listing of amenities. They want more than just a telephone-style directory with names, addresses, and contact information.
- **Listing of unique restaurants and shopping.** One of the first decisions a visitor makes after choosing the destination and lodging is restaurants and shopping. The South Padre Island CVB needs to identify and promote those unique dining and shopping experiences for visitors. Again, be sure not to fall into the trap of listing *every* restaurant and shopping attraction equally. Feature only those offering unique experiences. Those who are disturbed that the South Padre Island CVB is not printing a comprehensive listing need to be reminded that a full listing of restaurants, shopping opportunities, etc. should be available in lodging rooms throughout the area. The goal here is to compel visitation and extend the stay.
- **Events.** One wants to inform the visitor about annual events and seasonal product offerings that compel visitation. Again, this helps facilitate the visit.
- **Idiot-proof map.** A comprehensive, very clear map is critical to all visitors. Great care should be used in developing this map, and it should be tested on visitors to evaluate usefulness. Please note that in the research conducted for this study, a good map was one of the most requested items.
- **Contact for more information.** Tell the visitor exactly who to contact for more trip planning information. Ideally this would include a toll free phone number, fax, Email address and street address as well as web site. Put the toll free number and web site address in big bold numbers at the bottom of each brochure page.
- **Distribution plan.** After developing the brochure it will be necessary to establish a distribution plan. Various distribution agencies will need to be contacted and services contracted.

NOTE: See comprehensive recommendations on these pieces under Tab 3, “Marketing Materials Analysis” section in this report.

Marketing Strategies

4. Padded maps with information on reverse side

Once the primary brochures have been redesigned, RTM recommends re-designing the existing South Padre Island Area Map to reflect the same image and messages of the primary brochures. One wants to make sure the map design resembles the look of the other marketing materials and meets the following criteria: one or two-color map with information on "must-sees," attractions and unique dining and shopping listed on the reverse side. The copy for the information would match the detailed information found in the visitor guide. However, since it is given to those already in the area, it can be printed with less expense.

This is an excellent "extend the stay" tool as well. When visitors are overnighing in the area – whether for business, meetings or pleasure – they will use this map to identify reasons for them to perhaps stay one day longer or plan a return visit. Ads can be sold to defray the cost of the map, if necessary.

Pads of these maps can continue to be distributed to area hotels, attractions, restaurants, etc. This makes it easy for the front line to simply pull off one of the maps, highlight routes or other information and hand it to the visitor.

5. Inquiry and fulfillment procedures:

- South Padre Island CVB has an established "fulfillment procedures" process. RTM recommends an annual review of the performance of inquiry-to-fulfillment based on this established process.
- RTM recommends documenting the inquiries by collecting the following kinds of information:
 - Point of origin
 - Address, Telephone & Email address
 - When planning to visit
 - Primary interest
 - Leisure/vacation/getaway
 - Business
 - Visiting friends and relatives (VFR)
 - Group
 - Convention/meeting
 - Other

6. Advertisement design

Similar to the primary brochures above, the ads designed to attract visitors to South Padre Island need to reflect the positioning statement and to offer the most compelling reasons to visit the area.

- Ads need to be simple, clean and highlight the attractors.
- RTM reviewed the previous ads for the South Padre Island CVB and recommends that they be improved with a design that mirrors the look and imagery of the marketing materials we've recommended earlier in this document. It is critical that all materials have a consistent look to create the highest level of awareness with the South Padre Island CVBs investment.

7. Advertising planning and placement

Visitor research should be the foundation of all future advertising decisions.

- Plan annual advertising investments based on research, objectives, and previous year evaluations and conversion rates.
- According to international research, the most effective placement of advertising in the Mexico markets is local radio that targets ages 18-55. In Mexico, families like to vacation together, and radio has proven successful in reaching these families. Also, billboards are suggested in key intersections in the affluent Garza Garcia area of Monterey.
- As seen in this research, the most effective placement for U.S. advertising media for South Padre Island includes:
 - *State Travel Guide*
 - *AAA Home & Away*
 - *Southern Living*
 - *AAA Tour Book*
 - *Texas Monthly*

Other potential placements need to be analyzed against cost-per-inquiry documentation data produced by the South Padre Island CVB. Some placements may be so new that they have not had time to fully show their value. If an ad is generating strong cost-per-inquiry ratios, it should be maintained until future research can test its conversion capability. It is also recommended that a conversion study be conducted annually to analyze ratio of actual visits to inquiries.

Marketing Strategies

8. Public relations efforts

Considering the South Padre Island CVBs total outreach and marketing budget, public relations efforts are a critical marketing tool. PR provides outstanding “bang for the buck.” Further, it most effectively and efficiently allows the South Padre Island CVB to reach out to new markets.

- RTM recommends that the South Padre Island CVB prepare an Annual PR Plan based on specific objectives, strategies and tactics.
- RTM recommends consistent, year-round public relations efforts aimed at gaining media coverage in the primary target geographic market areas in Texas, the Midwest and beyond.
- Further, RTM recommends the South Padre Island CVB perform an annual “return on investment” study for public relations efforts. This annual study needs to include:
 - Copies of press kit, news releases and mailing list for that calendar year.
 - A full listing of mailings to media contacts.
 - Number of media contacts made during the year (segmented by phone, mail, FAM tour, visit)
 - Number of placements in inches of stories that ran outside of the South Padre Island area – and their dollar value if it were advertising placement.
 - Number of placements in inches of stories that ran in the South Padre Island area.
 - Number of calls and inquiries received from each story (at least an approximation).

The annual review will support the South Padre Island CVB in understanding which public relations activities provide sufficient results. Those results can be incorporated into planning the following year’s public relations efforts.

NOTE: See comprehensive comments on press kit and media coverage for South Padre Island under Tab 3, “Marketing Materials Analysis” of this report.

Marketing Strategies

9. Marketing partnerships with South Padre Island area lodging, attractions and amenities

Our overall strategic direction for growing tourism in the South Padre Island area includes aggressive promotion of existing tourism products to a pre-determined matrix of strategically targeted niche markets. Therefore, it is important that the South Padre Island CVB have a dynamic and successful marketing partnership with and among its constituencies to accomplish this strategy.

- Hold an annual "marketing retreat" for idea sharing, benchmarking, and planning with local hoteliers, attractions, and other tourism organizations in the South Padre Island area. The purpose of this marketing retreat is to determine priorities for development of a niche sales matrix and focus outreach efforts by the CVB and its marketing partners.
- The CVB needs to distribute research findings, tracking documents, and creative strategies to enroll and empower progress for constituents.
- The CVB needs to be a leader in promoting "packaging" co-op opportunities for these groups.

10. Establish a strong technology strategy for outreach to all market segments

Nationally, travel data research reflects dramatic growth in the success of Internet and electronic marketing for strategically growing tourism revenues for travel destinations. Similarly, research conducted by the State of Texas confirms this trend. In this study, we learned that the South Padre Island CVB web site is the number one source of visitor information. One can be certain that potential travelers to the South Padre Island area will become increasingly reliant on the Internet for travel planning. Thus, having an excellent web site and technology use strategy is critical for the South Padre Island CVB.

One sees that this represents an opportunity for the South Padre Island CVB to continue enhancing and expanding its web site and create the compelling images and copy that will best position and sell potential visitors. The key Internet factors are:

- Internet site must be user friendly, fast and informative.
- The site needs to be interactive in order to engage and retain visitors.
- Site needs to accommodate interest by leisure, business, group, reunion, sport and small meeting market segments.
- Imagery and key messages for the site need to be consistent with all other advertising/PR materials.
- Fax promotion materials available for fax on demand.
- Keep that toll free number prominently displayed throughout the site.
- Establish Email databases and begin E-marketing with package promotions to those who have inquired previously.

Marketing Strategies

10. (Cont'd)

- Improve current data management processes for all inquiry databases to provide improved demographic data for future marketing decision making. The purchase of data management software program is recommended in this report and the software will be of benefit in all technology related marketing efforts.
- Improve current reader service label processes to allow for better efficiency in processing fulfillment packages and long-term database storage and analysis.
- Purchase electronic marketing software that enable electronic marketing to niche markets.

11. Trade shows

Trade shows are a critical component in outreach efforts for the South Padre Island CVB. It allows the organization the opportunity to present its message to large numbers of meeting, leisure and group trip planners. RTM recommends South Padre Island CVB employ the following principals for attendance to trade shows

- Continue as now with a combination meetings and group tour planner that includes an area map, photography, facilities descriptions, listing of amenities, and maps.
- Match tradeshow attendance to research-identified target markets (geographically and market segments).
- Booth display should be visually exciting and utilize the same imagery recommended in this report for brochures, ads, etc.
- Solicit support of local tourism "partners" for expenses, promotions, give-aways etc.
- Encourage participation with local tourism "partners".
- After attendance to the trade show, an evaluation should be conducted (on an annual basis) to determine which shows generated sufficient return on investment and which did not. The plan for the following year of trade show attendance should be based on this analysis.

Gateways, Signage and Visitor Information Centers

12. Gateways

As documented in the reconnaissance section of this report South Padre Island has an excellent, attractive gateway. It is important for visitors to know when they have arrived in a destination, that they are welcomed, and where to go to find trip planning information. The current gateway accomplishes this goal.

The most critical aspects of a gateway according to visitors include:

1. Prominent location upon entering the community.
2. Attractive and architecturally pleasing.
3. Directions to visitor information.
4. Landscaping.
5. Lighting (important at night).
6. Includes positioning (why should I visit here?)

13. Wayfinding and visitor signage

Wayfinding is one of the most frequent complaints RTM documents in numerous tourism research studies. When one is new to an area, finding the way into an area and from attraction to attraction can be frustrating and tiresome. It can actually shorten visitor trips and encourage travelers to leave. Thus, it is incumbent upon the CVB to ensure that wayfinding is as easy as possible.

Visitors report that they need an accurate, user-friendly map and written directions to help them find their way. Also, they want signage that leads them to attractions. In downtown areas, they want signs placed so that they have the time necessary to negotiate their way into the proper turn lanes, etc. If the route they must travel is long, they also want "reassurance" signage that confirms they are on the right path.

Wayfinding and signage is a constant challenge. And, it is one area that is easy for a CVB to ignore or forget about. After all, residents and the employees in the CVB know their way around, and there are always many priorities for time, so this is inherently easy to ignore.

RTM recommends that the South Padre Island CVB make a priority of annually conducting a reconnaissance of all signage leading from primary routes to the Island and to specific tourism attractions and major amenities to determine where the challenges in wayfinding are to be found. Then, an annual plan for enhancing wayfinding needs to be developed. This is a process of continuous improvement.

14. Continued enhancement of visitor center

As with the gateway, RTM is pleased to report that the South Padre Island Visitor Center meets and in some cases exceeds expectations. During reconnaissance and in visitor interviews it was determined that the current visitor center facility is easily located, has good information, even an external lighted information board for after hours arrivals, and has professional and friendly attendants.

During the course of this project we "mystery shopped" the South Padre Island CVB Visitor Center on several different occasions. The visitor center is conveniently located upon entry to the Island and has adequate signage and good parking availability. Our team was impressed with the atmosphere of the center, the excellent service, as well as the displays within the center.

Ideally the primary visitor center would have the following:

- Excellent signage directing travelers into the center.
- Good parking for cars and motorcoaches.
- An architectural look that reflects the positioning of South Padre Island.
- Excellent restroom facilities.
- Rather than one information desk, have several smaller "help stations" throughout the center. This will encourage interaction rather than visitors having to approach a counter to request information.
- Brochure racks.
- A board for posting current festivals and events and ideal seasonal activities. Include such monthly and seasonal items as birds or wildflowers one might find blooming at the time of visit or other similar items.

The entire goal of this visitor center is to compel extended and return overnight visitation to South Padre Island and to drive economic impact.

15. Continuous training and enhancement for South Padre Island CVB visitor center staff

During our several "mystery shopping" exercises at the South Padre Island Visitor Center, we were impressed with the staff we encountered, their friendliness, attentiveness and professionalism.

Continuous training for visitor center staff is always recommended. The visitor center staff's role in the conversion process is absolutely crucial. Also, this is a job where burnout is a constant threat. It is quite challenging to continue to answer the same questions constantly and be cheerful, helpful and enthusiastic. The visitor center staff needs constant reinforcement and support to consistently deliver an excellent performance.

Specifically, training in conversion is always recommended. The staff needs to be constantly coached to be proactive in conversion by asking visitors if they can help with lodging reservations. Their primary goal is to create economic impact and get people to stay overnight or extend their stays.

Further, RTM recommends consistently repeated "mystery shopping" of visitor centers to monitor excellence. Additionally, the visitor center staff might be encouraged to "mystery shop" other visitor centers themselves to see benchmarks of good and poor practices.

Promotional Efforts

16. In-room repeat visit promotion

Existing overnight markets for the South Padre Island CVB includes the leisure, business, convention/meeting, and those visiting friends and relatives. RTM recommends a strategy of enticing these travelers to come back another time, or perhaps in another season, to experience South Padre Island.

- This strategy would be implemented by having either tent cards or informational pieces in each lodging room which identifies the “must sees” and other attractions and activities to be enjoyed seasonally in the South Padre Island area.

17. Create seasonal reasons to visit South Padre Island

As was noted in the research, visitation to South Padre Island occurs all year long. However, in some months visitation is less than desired.

There are unique activities and events scheduled in South Padre Island for each season of the year. The South Padre Island CVB does a good job of highlighting current events so that visitors can easily see what things might be enjoyed. RTM recommends that the South Padre Island CVB prepare a detailed calendar of seasonal events and activities which can be enjoyed by visitors and distribute this to all lodging properties, restaurants, and other visitor points. Also, this information should be included in the fulfillment piece or comprehensive visitor guide mailed to inquiries. Also, sending monthly or even weekly faxes to lodging properties would be beneficial. This would make very good information for front desk staff at local lodging properties. Bear in mind that the South Padre Island CVB should only market events that have the opportunity to increase lodging occupancy and economic impact for the city. Major festivals or events should be followed up with a fax survey to local lodging to determine the actual impact on room sales. This will provide guidance for future marketing efforts for events and festivals.

Additionally, RTM encourages the South Padre Island CVB to consider development of festivals and events to draw visitors during the less-visited months. As an example, December for Biltmore House in Asheville, North Carolina used to be the slowest month of the year. They virtually closed down the attraction. One year they decided to begin a Christmas festival at the historic house with great decorations, music, activities, etc. December is now the busiest month of the year for this attraction. So, it can be done.

RTM would suggest that the South Padre Island CVB first look to the identified “unmet needs” documented in the visitor research for any new event planning.

Direct Sales Efforts

18. Convention and meeting recruitment

South Padre Island CVB has worked diligently and earned good results for its convention and meeting recruitment efforts.

RTM conducted executive interviews with meeting and convention decision makers as part of this comprehensive study. We interviewed a sampling of those who had booked meetings in South Padre Island, and those who had *not* booked meetings on the Island. Overall, we heard good comments about South Padre Island CVB, its staff, and its outreach efforts.

Results of this portion of the study indicate the single biggest challenge to recruiting meetings for South Padre Island is the remoteness of the Island. Holding a meeting in South Padre Island entails either very long drives or expensive air travel costs.

Additionally, many corporations have cut their travel and meetings budgets, many by as much as 50% in 2001. Thus, we see that the competition in this market segment is increasing rapidly. Further, meeting planners report to RTM that they have so many other destination options that they will *only* consider destinations that offer all facilities in a close, comfortable walking-scale scenario. In other words, there must be sizeable meeting space directly connected to lodging, restaurants, shopping, etc. or they will simply not be interested.

Another challenge to increasing convention/meeting sales is the lack of a 300+ room lodging property adjacent to the Convention Center. Also, RTM learned that it is difficult to obtain room blocks from existing hotels who prefer to utilize these rooms for the more profitable leisure visitors.

A third challenge identified by government meeting planners and smaller meeting groups is the expense of meeting at South Padre Island. Specifically this refers to the hotel rates charged on the Island.

Interestingly another response was "Our meeting is too small for a resort destination." This statement was made by several groups of approximately 200+ attendees, indicating perhaps a need for a "We do small meetings" message in marketing efforts.

Currently, South Padre Island CVB is most successful in recruiting meetings from within the state of Texas, and specifically from the valley region. The next most lucrative current markets include the major cities in Texas (San Antonio, Dallas, Houston and Austin). A very small, but growing percentage has successfully been recruited from out of state.

18. (Cont'd)

South Padre Island CVB must continue to work with local lodging properties to identify potential for the convention and meeting market. RTM suggests holding quarterly reporting and brainstorming sessions, hosted by the CVB, with area lodging representatives. The purpose of these meetings is to report on the priorities of planned efforts and identify possible new leads.

For too long, meeting planners have held meetings in places where transportation must be provided by shuttle, etc. and have endured the wrath and displeasure of their meeting participants. In today's competitive environment, these meeting planners cannot afford to plan meeting sites where transportation or availability to all these demanded services is unavailable. RTM has documented research reporting that meeting participants demand that they be able to "park the car once" and have the lodging, the meeting places and the entertainment all within easy walking scale. Thus, the travel industry is seeing growth in convention and meetings in successful markets such as San Antonio, Savannah, Chicago and in other locations where this "park once and get to everything" scenario exists.

The current facilities in South Padre Island are a challenge to this concept. It is important that area lodging managers and other marketing partners understand this competitive environment.

The South Padre Island CVB needs to also provide information that may be mailed out to attendees prior to attending a meeting in South Padre Island. The purpose of these mailings is to extend the stay and encourage maximum attendance.

Thus, our specific recommendations for continued convention/meeting recruitment include:

- Brainstorming with marketing partners to identify likely possible contacts.
- Identify a list of all in-state association and likely convention and meeting contacts.
- In Mexico, target Monterrey corporations such as Grupo Finsa, Groups Protexca, Cemes, etc. These companies have representative PR offices in Monterrey at Centrimix, a mall of companies located under one roof.
- Additional possibilities include targeting Macquiladoras. Plants such as Ford Motor, Tool and Die Shops with huge plants in Monterrey and all the large border towns are relatively close to South Padre Island. These plants can be contacted directly as well as through travel agencies in Mexico.

18. (Cont'd)

- Initiate a "pre-sales" screening. Call all possible contacts and first determine if they are a likely candidate and match the existing resources. Put all possible candidates in a database and begin full-scale recruitment efforts. Track the likely meetings to determine where they eventually choose to meet for future reference and continual refinement of the database.
- Preparing possible materials that would be included in any mailing to convention and meeting planners.
- Contacting local lodging properties to offer partnership and to determine needs. Understand these lodging properties may need to be coached to understand the value of this promotion for their own interests. Work with them to understand the full range of resources (meeting space, transportation, etc.) options that are available.
- Identifying possible convention and meeting decision makers and support lodging properties in contacting these leads.
- Following up with lodging properties to determine the success of promotional efforts and what's needed for continuous improvement of the promotional effort.

19. Group tour and motorcoach sales effort strategy

The remote geographic location of South Padre Island again creates challenges for group tour promotion. RTM recommends that the South Padre Island CVB understand that group tour is not, at this time, as much a priority as leisure marketing efforts. RTM does recommend that the CVB continue to attend the appropriate trade shows, and make strategic direct sales calls to group tour operators.

RTM recommendations for group tour recruitment efforts include:

- Continuing to use the dual-purpose meetings and group planner marketing materials identified under the "Marketing Materials Evaluation" section in this report.
- Maintaining a group tour page and links on the website.
- Identifying a list of most likely tour operators and trade shows (such as the previously mentioned bank clubs and senior groups in appropriate Texas markets)
- Utilize electronic marketing opportunities and send e-mailers to database contacts.
- Plan trade shows based on selection of those most likely to match target decision makers (see research for specific recommendations).
- Having a booth for trade shows that is dynamic, matches the image of the revised primary marketing materials and works to capture the attention of trade show participants. You must stand out and be memorable so make that booth dramatic!

Marketing Strategies

19. (Cont'd)

- Contacting your area tourism-marketing partners, attractions, etc. to obtain give-aways and promotional items.
- Follow-up with all trade show leads for maximum results.
- Solicit partnerships with lodging and the attractions in South Padre Island on reporting any and all group tours that occur. The reporting by these marketing partners to the CVB is critical in helping the CVB to continually fine-tune its direct sales efforts. Unless this reporting occurs, the marketing partners should not be allowed to complain regarding this matter.
- Make personal sales call missions annually to targeted group tour operators in the South Padre Island CVB target market areas.
- Follow up all group tours with an evaluation form that allows you to determine the perceived strengths and weaknesses of the South Padre Island area as a group destination.

20. Leisure sales calls to travel agents and tour operators in Mexico

The proximity of key Mexican markets to South Padre Island dictates a need for marketing and direct sales efforts to encourage leisure and group visitation.

RTM recommends three sales blitzes in September, January and May to the key Mexican market cities of Monterrey, Saltillo Nuevo Laredo, Matamoros and Reynosa. In Mexico you must establish key personal relationships with potential buyers and partners. One must gain trust and loyalty with repeated sales calls.

Organizational Structure

21. Organizational structure strategy

During this study, RTM evaluated the organizational structure of the South Padre Island CVB, its staffing and its authorizing and reporting structures. We are delighted to report that we found nothing that would indicate a problem.

The International Association of Convention and Visitor Bureaus (IACVB) is a membership organization of Convention and Visitor Bureau organizations. The IACVB maintains extensive research that provides communities with excellent resources for determining most effective staffing, promotion and funding options for tourism development. RTM recommends that as the South Padre Island CVB continues to grow, that their practices be continually measured against the standards established by IACVB for appropriate development.

RTM recommends that SPICVB have a governing board that is comprised of stakeholders in the local travel industry. The most effective tourism Boards are those that truly represent the industry, are limited in size and have an Executive Committee that is empowered to make critical decisions when the full Board is unable to meet. RTM generally recommends a manageable board size of approximately 9 members, with 3 appointees representing local lodging properties, 3 members representing local attractions, and 3 members representing restaurants, and other tourism entities. Fair and equitable representation should be established from all sectors of the travel related community and the two municipalities.

Committees should be chaired by board members and made up of board and non-board members who are actively involved in tourism promotion. An effort should be made to include representation from as many tourism entities as is possible on each committee. Committees should meet only as necessary and should do the actual planning work of the organization. Committees should send recommendations to the Executive Committee or full board for action. The Executive Director coordinates and guides the planning process of these committees to insure realistic goals and plans are put in place.

The committees that should be considered include, but are not limited to:

- Finance and Grant Development
- Product Inventory and Development
- Research and Marketing
- Leadership and Training

21. (Cont'd)

The Leadership Committee mentioned above is recommended to target and identify potential future leaders for the tourism organization. This can be accomplished with:

- On-going hospitality / front-line training
- Annual "Rising Star" awards and recognition
- Tourism leadership mentoring program

22. Staffing for South Padre Island Convention and Visitors Bureau

The role of the South Padre Island Convention and Visitors Bureau is to be "the voice of tourism" within the community. As such, the Director and staff of the organization need to understand the trends that drive the industry. The staff needs to continue to be aggressive in attaining awareness of the role of tourism in the community within the local industry, business leaders, government leaders and residents.

In addition to its leadership roles, the South Padre Island CVB staff should be considered the marketing/advertising agency for tourism in the region. They exist to promote and advertise the area to the traveling public to generate maximum economic impact. Similarly, the South Padre Island CVB needs to be proactive in educating its industry partners (lodging, attractions, etc.) on current research findings and other data, which will assist in tourism marketing.

After a careful review of the accomplishments and practices of the current South Padre Island CVB staff, RTM is pleased to report that we found nothing that would indicate a severe need for staffing changes. In fact, we were highly impressed with the effectiveness of the current staff. In analyzing the expense of the current staffing as a percentage of the total budget, we find that in 1999/2000 the percentage of budget allocated to salaries and benefits was approximately 23.9% of the total lodging tax collections. When we compare these figures to national averages as reported by International Association for Convention and Visitor Bureaus (I.A.C.V.B) we find that the expenditures have been appropriate.

RTM recommends that the South Padre Island CVB monitor annual budgets and work plans based on its research findings and the standards of operation recommended by the International Association of Convention and Visitor Bureaus (IACVB). For instance, IACVB recommends that the salary level for a typical CVB be in the 25-40% range of total occupancy tax collected. To determine when it is time to add new staff, a CVB looks at its tax collections and percentages of expenditures. If it finds that staff costs are in the 25% range of total occupancy tax collected, it can

22. (Cont'd)

reasonably be determined that there is more workload than the current staff can handle.

Upon adding a staff person, the CVB might see the percentage of total budget increased to the 40% range. Then, as the new staff person becomes productive, the percentage of total budget should begin to decrease.

Thus, RTM concludes that it is time for the South Padre Island CVB to consider adding another staff position. We understand that the CVB is planning to add a staff position in the technology, website, and database marketing area. Reportedly, this will bring their staff allocation to approximately 29% of total tax collections. This is appropriate and is encouraged by RTM.

Funding For South Padre Island CVB

23. Lodging tax funding for CVB

As is the standard in the tourism industry, all lodging tax monies should be used exclusively for promotion of overnight visitation.

Currently in South Padre Island a 7% lodging tax is charged to visitors staying overnight in local lodging properties. 100% of those funds are allocated to the CVB for tourism promotion and marketing. This reflects an appropriate level of awareness in the community that the economy in South Padre Island is dependent upon successful tourism marketing.

The average annual growth over the past four years in this fund has been 7.02%. This compares well with the national average rate of growth (4.9%), and the State of Texas reported rate of growth for 1999 at 7.6% statewide. This validates that the investment in tourism marketing has worked for South Padre Island.

RTM suggests that for future planning, the overriding question to be asked regarding ANY tourism tax expenditures is "Will it bring more overnight visitors into South Padre Island?" If a strong, affirmative and reliable answer to this question cannot be provided, it is not a wise expenditure. This should be the guiding principle for all future uses of lodging tax dollars.

RTM recommends an annual report be developed which clearly defines the funding received, the promotional activities invested in, and the return on investment to the community for these expenditures. A strong CVB wants a history of providing this information to local governments and consistently earning their understanding and commitment to these goals.

Recommended Product Development

South Padre Island has high quality attractions and tourism products. This is reflected in the appeal of the area and the high satisfaction rating visitors give the Island. In this study, we also asked tourists what products, services and attractions they would most like to see added to the existing product mix.

In RTM's analysis of the results for this section of the study, we interpret the data to mean that while visitors enjoy visiting the area, they are searching for additional things to see and do. This is reflected in the high ratings given the new products. Interestingly, the data reflects both the desire to see the area continue to build a strong tourism product base *and* a desire to see the area continue to build its "sense of place."

In the visitor mail survey findings, the top reported new product needs include:

Guided tours of coastal scenery and history	67.39%
Shows / concerts / music	66.52%
Guided nature tour of birds, plants & wildlife	60.43%
Shopping excursions to nearby malls	50.00%
Large scale birding center similar to a large aquarium	38.70%

Anytime we find a potential new product or activity that rates over a 40% approval mark, we can feel confident that this will be successful. All of the items listed above rated over or near the 40% mark.

Thus, what we find here is quite consistent with national tourism research that shows the growing interest in "a sense of place" and interest in nature-based tourism, as well as the appeal of fun activities while visiting an area.

In the strategies that follow in this section, RTM recommends specific new products and programs that will speak to these needs and support growth of a stronger tourism market for South Padre Island.

At the same time, it is critical that the community understands that the role of the South Padre Island CVB is to *promote* rather than to *build*. It is inappropriate for lodging tax funds to be used for development purposes, or for specific recruitment of businesses. The South Padre Island CVB should play a leadership role in identifying unmet visitor needs and encouraging development of new tourism products. Its partners, specifically the EDC and Chamber need to play the primary role in recruiting specific new businesses and development ventures.

24. Guided tours of coastal scenery and history – guided birding and wildlife tours

This was reported as the top unmet need and new tourism product request of overall visitors to the Island. One should especially note that when combining the number one stated unmet need (Guided tours of coastal scenery and history) and the number three reported unmet need (Guided tours of birds, plants and wildlife), as well as the number five reported unmet need (Large scale birding center similar to a large aquarium), we find that this far outdistances any other need. RTM interprets this to be a mandate by visitors to provide more nature-based tourism experiences.

For comparison purposes, RTM finds that any unmet need that is rated highly (over 40%) is significant. To find these guided excursions rated at above a 60% mark indicates *highly* significant levels of demand.

In similar studies, RTM has documented this same need. Clearly, visitors love what they find in South Padre Island and want a greater connection to the Island's environment, wildlife and history.

Also, it should be noted that it is the "guided" part that offers great appeal. It is a form of "edu-tainment" that today's leisure visitor finds compelling. Especially in unique nature settings such as South Padre Island, they want to know more about the kinds of birds, plants, and wildlife they may find. They want to know about the Island's history and how it has become a wildlife haven.

Thus, RTM recommends this be the first priority for new product development. RTM sees this as a perfect fit with plans for a wetlands center and other nature development at the north end of the Island. RTM also sees this "guided" aspect to be a need that should be attained.

25. Addition of nature studies center to existing Convention Center

Although convention and meetings utilize the Convention Center, the north Island location of the Convention Center is a great location for birding and nature studies. Also, it should be noted that even the most successful convention center will never pay for itself. The community will continually have to invest in updating meeting facilities. RTM recommends an addition be built to the current Convention Center to tie in with other plans for wildlife interpretation, wetlands projects, etc. Perhaps this could take the form of a whole Island interpretation center from which guided nature tours are given. This could definitely generate revenue and perhaps offset continued loss of revenues by the Convention Center. It could be a perfect answer to both needs.

26. Shows/concerts/music

Lack of a variety of quality adult and family nighttime entertainment options was identified as an unmet need. Again, the high rating of this unmet need at 66.52% indicates the significance of the demand. Clearly, this is seen as a need.

However, RTM has also noted that a number of entertainment events that were planned on the Island had less than desired attendance. We find this interesting given the reported demand for nighttime entertainment. Perhaps an answer can be found in the irregularity of entertainment offerings. Or, perhaps it was the type of entertainment offered. RTM recommends further investigation and market testing of nighttime entertainment possibilities with seasonal intercepts. It is hoped this would shed more light on exactly what type of entertainment guests would be willing to attend and purchase tickets to see.

27. Shopping excursions

It is no surprise that this rated as a priority need with 50% of visitors. Shopping is documented as the number one visitor activity for both Mexican and U.S. tourists. In this study, shopping was reported as the number two or three most popular activity by every segment studied. In stark contrast the expenditures for shopping documented in this study are the *lowest* expenditure category. This is the lowest documented percentage of expenditure RTM has ever found when comparing this to similar studies.

According to RTM research and as documented by *Travel Industry of America (TIA)*, activities participated in by U.S. resident travelers for 1999 included:

- Shopping (33%)
- Outdoor (17%) (Camping, hiking, biking, etc.)
- Historical Sites/Museums (14%)
- Beaches (10%)
- Cultural Events/Festivals (10%)
- National/State Parks (10%)
- Theme/Amusement Parks (8%)

RTM interprets the high rating for this activity to mean that visitors to South Padre Island are not finding the type of merchandise they want to buy on the Island and are seeking alternatives. This is a tragic loss of sales and tax revenues for the Island.

27. (Cont'd)

One must remember that the best definition for tourism, from a community-wide standpoint, is putting visitors in front of cash registers. Shopping can clearly generate significant economic impact for South Padre Island. RTM recommends priority efforts be made to keep this economic engine moving forward. Thus, RTM recommends that the existing inventory of unique shopping for South Padre Island be identified and promoted aggressively to visitors.

RTM recommends a priority program of upscale retail recruitment be initiated by the EDC and Chamber. Again, it is inappropriate for the CVB to *develop* businesses. Their role is to *promote*. It is the role of the Chamber and EDC to seek new developers and encourage entrepreneurial efforts.

RTM also interprets this data to mean that shopping excursions to *locations other than South Padre Island* will continue to be successful. Currently several excursions exist, primarily for trips into Mexico. Other entrepreneurs may want to experiment with similar shopping excursions to areas such as Port Isabel and other valley locations.

28. Other potential products

Although not specifically identified and confirmed in research as having high potential, RTM recommends investigation of the following potential tourism products in addition to those identified above. Our rationale for recommending these includes noteworthy attributes documented during our reconnaissance, and likelihood of success based on similar products promoted in other communities similar to South Padre Island.

A. Golf packaging

Nationally golf is identified as an activity of choice for one out of five tourists. The South Padre Island CVB needs to encourage continued development of quality golf facilities and coach marketing partners in developing golf packages with existing facilities. These packages could be promoted in the visitor guide, on the web site, as stand along brochures in the region, and promoted in e-mailings.

B. Build a reputation as a dining destination

We found many wonderful dining opportunities in the area and the research revealed interest in the dining offering in the area. Many coastal towns are known for a distinct style of dining or an impressive variety of dining styles. Either way, we recommend that the restaurateurs in the area get together and work with the CVB to build the area's reputation for unique and quality dining. PR will be the source in this promotion.

28. (Cont'd)

C. One man shows and nighttime “edutainment”

Our reconnaissance revealed an abundance of fun nightspots for those who are young at heart and thirsty. We were surprised to find a lack of evening activities for those looking for an “edu-tainment” or family oriented activity. This can be as simple as a “James Taylor like” singer performing at a beach pavilion on summer evenings. It might be a wonderful storyteller who spins yarns about locale legends, heroes and sinners.

Any nighttime entertainment that “fits” the coastal atmosphere and heritage will succeed if it is promoted to the traveling public and they can find it.

Local Education and Hospitality Training

29. Recommended hospitality training

RTM recommends enhancing hospitality training in South Padre Island to support hospitality workers in being trained in understanding and communicating the unique positioning for tourism in this destination.

Hospitality training is a challenge for the tourism industry. The “front line” at hotels, restaurants and attractions tends to have a high turnover. Finding and recruiting a sufficient number of employees is often a problem. Additionally, managers of these front lines may or may not have in-depth knowledge of best practices in tourism hospitality training. Thus, the industry has trouble in motivating what may be an already overworked and fluctuating work staff.

Thus, RTM recommends the South Padre Island CVB provide the following support to the local tourism industry:

- Short (30 minute) on-site workshops for any local hotel, restaurant or attraction that requests hospitality training.
- Invite local industries to seasonal half-day or daylong workshops.
- A package of training materials that can be utilized by local area managers to provide on-going staff training.
- Small laminated cards “The Must Sees of the South Padre Island region” which identify the top things to see and do in the area. Include things to see and do on rainy days. To increase the use and remembrance of these cards by local hospitality industry workers, we further suggest that a representative of the South Padre Island CVB periodically walk up to front line employees and ask “What do you say when asked “What is there to see and do around here?” Any respondent who can name all the things highlighted on the laminated card from memory receives \$25 on the spot. Be sure to also take their photo and send a news release and photo to the local newspaper for coverage of the ambassadors of tourism.
- Periodic faxes sent to the local industry highlighting the seasonal benefits of visiting South Padre Island that have been mentioned earlier in this report, will also help the local industry enthusiastically suggest fun things to do and see.

30. Recommended education for local population

RTM also recommends an annual educational effort designed to inform the local public regarding what tourists find most appealing about visiting in the South Padre Island area. It is often hard to appreciate one's own area due to familiarity. When asked, we often find that local people are likely to tell us "There's not really much to do around here." Because they see it everyday, they may not appreciate the local tourism options as much as a visitor. By reminding local residents what tourists tell researchers they like about the area, it helps them to keep the perspective and to understand that the area is truly desirable as a vacation destination.

RTM recommends an annual pullout special section in the newspaper that identifies the top things most appreciated by visitors to South Padre Island. Residents can then read this and hopefully become better informed as to the importance of tourism to the area, as well as being able to file this away for future reference.

On-going Evaluation Methods

RTM recommends continued evaluation, research and measurement of tourism success, unmet needs and marketing efforts for the South Padre Island CVB. The specific components of this future study include the items listed below.

31. Visitor satisfaction checks

It is important to continually monitor the level of satisfaction that visitors are experiencing while visiting the area. Sudden drops in the satisfaction rating could have a sudden and long-term effect on occupancy and overall visitor spending. Implement visitor satisfaction checks on a random sampling of visitors to attractions and visitor amenities. This is best implemented by a combination of telephone interviews with managers of local lodging properties, attractions and amenities, as well as conducting on-site random guest interviews. These could be conducted by staff at the South Padre Island CVB or by outsource service.

- South Padre Island CVB staff to implement periodic visitor satisfaction intercepts interviews and interviews with management of local lodging and amenities.

32. Conduct visitor profile and conversion research every three years

Changes in visitor profile and conversion need to be reviewed periodically. Therefore, RTM recommends repeating the visitor profile and conversion study every three years. It is not likely to change significantly any more frequently than the three-year period. Additionally, at every five/six year mark, research should reveal the strengths, weaknesses and unmet needs.

- South Padre Island CVB to plan and implement visitor profile and conversion research as outlined above.

33. Annual evaluation of inquiry point of origin

Annually, RTM recommends evaluating the point of origin (where inquirers live) of inquirers who respond to the South Padre Island CVB tourism advertising. This reaffirms for the South Padre Island CVB that it is targeting its advertising outreach placement to the most appropriate markets. This can be accomplished by maintaining a comprehensive database of all inquiries received throughout the year.

- Maintain comprehensive database of inquirers. Annually evaluate point of origin and other data collected from these inquirers.
- The purchase of a data management software program such as Bureau 2000 or CVBreeze will be of benefit.

34. Annual advertising conversion study

RTM recommends that the South Padre Island CVB conduct an annual advertising conversion study to continuously monitor and measure the most effective advertising outreach messages and methods.

This would be conducted with a mailing to a broad sampling of inquiries (estimate 5,000). A simple 2-sided questionnaire would be developed offering an incentive for completion and return. The questionnaire would list all advertising mediums and placements. It would ask the respondent to identify which one was the source of their inquiry.

We've learned in this study the rank order of responses to previous advertising. This will enable the CVB to continue to identify the advertising placements that are effective and those that should be deleted. Maximum return on investment is the goal of this continuing study segment.

35. Web site research form analysis

RTM recommends that the South Padre Island CVB add a questionnaire on its web site that allows the organization to continuously monitor the following:

- Point of origin for inquirers.
- Primary visitor interest.
- Most likely travel party size.
- When planning to visit South Padre Island area.
- Analyze the information frequently to continuously confirm other research results.

36. Annual documentation and analysis of current status

RTM recommends that the current status section of this report be repeated annually and monitored for changes. The South Padre Island CVB staff can implement this. The important things to measure include:

- Increases/decreases in occupancy tax collections and tourism revenues.
- Number of inquiries generated by outreach efforts.
- Changes in tourism product infrastructure (number of lodging properties and room counts, new attractions, etc.)
- Advertising, promotion and marketing budget for the South Padre Island CVB compared to standards established by industry organizations such as International Association of Convention and Visitor Bureaus (IACVB).

37. Inquiry Database "Data mining"

The South Padre Island CVB is now receiving so many inquiries that it will have to continuously refine its methods of database development and storage to insure that all inquiry data is easily accessed and reported in the future. Enhancements to current database methods include:

- All reader response inquiries received electronically and stored as an accessible electronic database.
- All bulk brochure requests retained and stored in a separate database.
- All telephone inquiries that do not require fulfillment should be tracked as such and included in the database system.
- All databases should be designed to be integrated for year-end reporting of total inquiry information from all sources.
- The purchase of a data management software program designed for CVBs will be of great benefit in all tracking and reporting. Bureau 2000 and CVBreeze are two popular and effective programs that are available to the CVB.



Top Ten Travel and Tourism Trends 2001

Judy L. Randall
Dr. Larry D. Gustke

Summary

Concerns over the economy will affect travel and tourism in 2001. Consumers will be slightly more cautious and thus slightly more conservative in their travel spending in 2001. They will still travel in record numbers, but they may stay a little closer to home and spend a little less. Specifically, leisure travel will grow steadily, business travel will decrease, group travel will decrease slightly, and convention travel will be more competitive.

Sixty-six percent of all travel trip purposes are reported to be for leisure, according to the Travel Industry of America (TIA). In 1999, there were 1.01 billion total person trips (defined as one person traveling 50 miles or more away from home and/or overnight). A trip is one or more persons from the same household traveling together. Seventeen percent of all travel is related to business, 4% for combined business/pleasure, and 13% for personal/other (primarily visiting friends and relatives).

Time has become one of the most precious commodities for today's overly busy, harried consumers. They simply do not have the time to spend doing a lot of planning for their vacations. Also, today's consumers are becoming increasingly frustrated at hassles associated with travel (traffic, lines, etc.).

Expect significant increase in reliance upon technology by all travel segments. The biggest news in 2001 will be the increase in number of consumers who *buy* travel on-line as opposed to merely using the Internet for shopping and planning. Also, RTM predicts that 2001 will see the emergence of new packaging, user-friendly technologies, guest efficiency processes and unique itineraries. These innovations will be the keys to winning the 2001 travel consumer.

The Top Ten Trends

1. **Economy concerns result in cautious behavior – will affect all travel segments**

- As opposed to the previously boisterous economy, consumers now expect an economic downturn. As reported by *Associated Press* on January 31, 2001, consumer confidence is at its lowest level since December 1996. Consumers are decidedly more pessimistic about business and employment conditions in coming months.
- RTM predicts that consumers will stay a little closer to home and spend a little less on travel in 2001. They will be seeking bargains and package deals and will be less likely to purchase the “exotic” travel options.

2. **Technology use will increase significantly**

- Consumers will demand access to on-line trip planning and trip purchase.
- European on-line travel will soar from \$2.9 billion in 2000 to reach \$10.9 billion in 2002, nearly a 300% gain, according to a new study by PhoCusWright, a leading Internet research company.
- According to *PC Data/Goldman Sachs & Co.* the top three expenditure categories on the Internet in 2000 were #1=computer hardware, #2=apparel, and #3=travel.
- *Travel Industry of America (TIA)* reports that online travel revenues will grow enormously over the next five years. Internet users booked \$276 million in travel online in 1996 including air travel, hotel rooms, car rentals, and other travel products. In 1997, sales tripled to \$827 million, and by the year 2002 the size of the online travel industry will reach nearly \$9 billion. So far, airline tickets have accounted for nearly 90% of all online travel sales.
- *Zonta Research* says web surfers may bail out if the information they request doesn't pop up within eight seconds. *USA Today* spent three weeks shopping on 70-travel industry web sites and in a 3-part report stated, “Obtaining fare quotes and comparing ticket prices is very time-consuming and frustrating. Many sites who claim to have the lowest prices simply don't.”
- *Jupiter Communications* predicts growth in web-based travel sales will continue to soar, averaging more than 125% growth annually until 2002. By 2002, web-travel sales will account for 7.9% of the market. *United Airlines* announced in June of 1999 that for the first time since it launched its E-ticket program in 1994, more customers (51%) traveled on electronic tickets than on paper tickets.
- RTM's 2001 prediction: Fast, accurate, user-friendly travel planning technology will be the main travel marketing tools of the future. Technology is in demand by the consumer. For the next few years we'll see new technologies popping up. Those that invest in these new technologies will generate significant increases in travel.

3. Leisure travel will increase

- As Americans seek to find rest and relaxation from their current stress-filled lives, we see leisure travel increasing year-round. Even though consumer confidence is dropping, today's consumer does not perceive vacations to be a luxury as much as they perceive it to be therapy required to maintain balance in their hectic lives. This means a steady increase in leisure travel, as we've seen documented in numerous studies around the country. However, we may see consumers choose to vacation a little closer to home, and spend a little less than in the previous few years.
- According to TIA, weekend trips by Americans jumped a dramatic 70% between 1986 and 1996 and they now account for more than half of all U.S. travel. In comparison, non-weekend travel increased by only 15% during the same period.
- According to TIA, tax refunds are a leading way people pay for their vacations. Nearly one-third of U.S. adults (31%) say they would include a vacation as part of their tax refund spending plans in 1999. Thus, planning your marketing messages at this time of year is sound advice.
- RTM's prediction: Destinations must strengthen their leisure marketing muscles and sharpen their target marketing skills. Today's consumer has an enormous range of vacation choices, with packages and discount deals abounding. Destinations need to be more competitive and focused on providing unique experiences and value to attract the leisure market.
- Family vacations are growing and accounted for 72% of all vacation trips in 1998 according to a *Better Homes and Gardens/TIA* study. Those families included "ones own kids" (77%) as well as grandchildren (15%) and others (20%). According to TIA, half (50%) of families took a long trip, spending six or more nights away. Short weekend vacations, from one to five nights, accounted for 41% and were more common in '98 than '97.
- Family reunions are popular with about one third of all family travelers, accounting for approximately 32 million travelers, according to the *Better Homes & Gardens Family Travel Report*. Among various age groups, Generation X travelers (18 to 34 years old) are the most likely to attend a family reunion. Regions of the country most likely for family reunions include the Midwest (42%), the Northeast (37%) and the South (36%).

4. Business travel will decrease

- Many corporations will cut travel budgets in 2001 due to concern over the economy. Several companies interviewed by RTM have cut their travel budgets by as much as half from 2000 levels. The National Business Travel Association's survey of corporate travel managers shows 61% reporting that they have curtailed all but the most essential travel within their companies. Sixty-six percent of 400 travel managers surveyed in December 2000 said their companies cut the number of employee trips, up from 30% in September.

- Business travelers continue to report frustration with airline travel, as well as the overall hassle of traveling (traffic, delays, etc.).
- According to TIA, the South Atlantic is still the most prevalent destination for business travel, drawing one-fourth (25%) of business travelers. The Pacific, East North Central, and West South Central regions are the next most popular destinations, each drawing 12%-16% of business travelers.
- The average age of business travelers is 42 and has risen from 40 in 1991. This reflects the aging demographics of the American public.
- Male business travelers take an average of seven business trips per year. Women business travelers take an average of four. Women are more likely than men to travel for conventions, trade shows, and meetings. Men still outnumber women business travelers, but the percentage is changing rapidly. By 2002, according to *U.S. News & World Report*, women will make up fully half of the business travel market. Expect to see more frequency programs targeted to women. Demand for Delta's Executive Women's Travel Network was so great that the airline created a waiting list.
- As a result of declining business segment revenues, RTM predicts that more hotels and lodging properties will be seeking increased support from their local CVB. They will be holding the CVB more accountable than ever. The smart CVB will take this opportunity to partner more closely with their previously reluctant-to-share-vital-information lodging constituents.

5. **Top activities and destinations for travelers**

According to RTM research and as documented by *Travel Industry of America (TIA)*, activities participated in by U.S. resident travelers for 1999 included:

- Shopping (33%)
- Outdoor (17%) (Camping, hiking, biking, etc.)
- Historical Sites/Museums (14%)
- Beaches (10%)
- Cultural Events/Festivals (10%)
- National/State Parks (10%)
- Theme/Amusement Parks (8%)
- Nightlife/Dancing (7%)
- Gambling (7%)
- Sports Event (6%)
- Golf/Tennis/Skiing (4%)

TIA reports that the top five types of vacation destinations reflect the same ones as in past years and include:

- Ocean/beaches
- Mountains
- Historical Sites
- Outdoor Activity (fishing, camping, sports-related)
- Lakes
- Theme Parks

Additionally, TIA reports that the following activities were planned by visitors after arriving at their destination:

- Restaurant (48%)
- Shopping area (45%)
- Museum or Exhibit (26%)
- Sightseeing Tour (24%)
- Movie (16%)
- Theme Park (15%)
- Religious Service (14%)
- Live Theatre or Other Performance (14%)
- Festival or Parade (13%)
- Other Activities/Attractions (24%)

Interesting Note: Increasing numbers of consumers are doing major shopping on their vacations—items such as boats, first and second homes, RVs, automobiles, etc. A possible reason is that this is the only time couples have time to ponder and investigate these purchases together. According to a report in *New York Times National Edition* by Bill Yetman, CEO of Beck's North America, "basically, we've decided to fish where the fish are." The company hired extra sales representatives in seven top destination locations.

6. Increase In Off-Season Travel

- The average American takes one long vacation (5-9 days) and four to five short "getaways" during the year. Weekend travel accounts for almost one-half of all travel.
- The latest figures from *Travel Industry of America (TIA)* documents the following seasonal travel pattern for 1999:
 - Winter 20%
 - Spring 24%
 - Summer 33%
 - Fall 24%
- RTM prediction: Continued increase in off-season travel interest, again with packages and special promotions providing the top interest. Primary destinations for off-season travel will continue to be in the 3-4 hour driving range of home.

7. Change forecast for group travel

- According to TIA, 31% of all household trips in 1999 were made by people 55 years old and older. This is down from 32% in 1998. The "War Generation" and "Eisenhower Generation" continues to fade out of the travel market. Baby Boomers tell us they are unlikely to participate in group tours – *unless a group tour offers them something they can't get on their own.* They are

interested in group travel if it offers them something highly unique (dance lessons with the Rockettes) or if they are traveling with an affinity group.

- Many attractions report that group tour comprises 10-40% of their overall visitation.
- RTM likens the upcoming change in group travel to that which occurred when airline travel affected the loss of business for the ocean liners starting in the 1940s. The ocean liners didn't go out of business - but transformed themselves into the cruise line industry and became focused on providing a unique travel opportunity. Not only did they not go out of business, they increased dramatically.
- According to American Bus Association, the following cities were rated best all around group travel destinations by over 200 motorcoach and tour operators:
 - #1 is Branson, Missouri
 - #2 is Washington, D.C.
 - #3 is New York, NY
 - The hottest up and coming award went to Myrtle Beach, SC, followed by Pigeon Forge, TN and Lancaster, PA.
 - Going to the theater and seeing shows was the most popular activity for groups, followed by gaming and sightseeing.
 - Best shopping destination award went to Mall of America in Bloomington, MN

Thus, RTM's predictions for 2001:

- Decline in overall group travel. Look for increasing competition in the less formal "group leader" market comprised of church groups, youth groups, and special interest groups. Destinations will need to develop increasing unique and fun activities that are tailored strictly for groups. Interestingly, cost is no longer a critical decision factor. Fun and unique is the message from group prospects of the future. Also, expect to see an increase in "GenXer's" for group tours. They are always looking for a deal, and a group or family-style setting.

8. Increase in "mature" travel

- According to TIA, mature travelers took nearly 179 million trips in 1999, an increase of 5% over 1994, and accounted for 31% of all domestic trips. In comparison, the highest share of domestic trips (45%) is by Baby Boomers. According to the TIA study, "The Mature Traveler, 2000 Edition," three-quarters of all mature travel is for leisure and most of these trips are to visit friends and relatives. "The potential of the mature market is tremendous because in less than a year, the first members of the huge Baby Boom generations will turn 55 years old," said Williams S. Norman, president of TIA. "The travel industry should be prepared for explosive growth in the mature consumer market." Favorite trip activities by mature travelers include shopping (29%), visiting historical places or museums (15%), attending cultural events or festivals (12%), gambling (11%), outdoor activities (11%),

visiting national or state parks (8%) and going to the beach (7%). (Special report to *Travel Advance*)

- According to a report in *Modern Maturity*, “over-50s” report they are likely to travel 3+ times per year (68%), travel by car (46%), for relaxation (42%) or adventure (32%), and prefer to travel either with their mate (39%) or family (22%) or as part of a tour group (16%).

9. Growing focus on niche markets

- Niche markets offer strong potential for destinations. Successful tourism marketers will learn how to identify and motivate these markets in order to grow tourism revenues.

Adventure: Everyone wants adventure, says *Travel and Leisure*. People are tired of snapping the same old photos and lying on a beach. The overachievers of the 90’s want adventure and unique experiences. RTM’s studies document the same attitude. It’s clearly “Give me something more, something new, something exciting and fun.” Some 98 million Americans took an adventure vacation in the past five years according to *TIA*. Adventure travel is increasing among “Over-50” travelers according to a *New York Times* report, which said many older people can be found “riding elephants in India, horseback riding in Costa Rica and bungee-jumping in New Zealand.” RTM has documented other studies showing women signing up for adventure travel experiences in record numbers.

Interest in heritage tourism and “authentic” places: Heritage tourism is growing as travelers look to connect with the past, as well as understand the various cultures that make up our world. Also, “authentic” is a word that now has more appeal. Consumers tell us that every place in America is starting to look the same. The same retail stores, lodging, restaurants, etc. are to be found. This “homogenization” of America is creating more interest in authentic heritage tourism.

Nature based tourism continues to grow and is showing up in new and interesting packages and partnerships. The National Ski Areas Association and the U.S. forest Service have teamed up to provide guided nature tours at ski resorts in New Hampshire, Colorado, Wyoming, and California. Also, gardens are popular with many travelers. Nearly 40 million Americans, or one-fifth of U.S. residents (20%) went on a garden tour, visited a botanical garden, attended a gardening show or festival, or participated in some other garden-related activity in 1998.

10. Innovation: unique travel at value prices

- According to an “Innovators” series in *Time Magazine* (January 22, 2001) travel is the purest expression of freedom. Hop on a plane or a train or get behind the wheel and in a few hours you escape – from the routine, the familiar, to something new, exotic, liberating. But for years, says the

magazine, the travel industry has managed (or mismanaged) to drain much of the freedom and spontaneity out of travel. Time says the impulse behind much of the innovation in travel these days is an effort to restore that spirit of freedom.

- Similarly, consumers today have little time to plan a trip. When one combines this "time poverty" with the increasing frustration and hassle of travel one could almost predict that some consumers will simply choose to stay home rather than travel. However, today's consumer considers travel and vacations as more of a "right" than a luxury. Thus, RTM predicts that in 2001 we will see more destinations and attractions and suppliers partnering in new and different ways to provide **unique travel opportunities**. The ones that will be the most successful will be those that offer value. As evidence, look at the success of *Arthur Frommer's Budget Travel Magazine*.

The ultimate top trend: Packaging & Itineraries

Simply put, this is the top trend for the foreseeable future. As consumers continue to lead stressed out, hectic lives they will continue to respond to packages and itineraries that "do the thinking for them." RTM's recommendations for packages and itineraries is to include:

- **Scenic beauty**
- **Unique dining and shopping**
- **Exciting, fun and unique activities**
- **Ensure quality**
- **Ensure convenience and enjoyment**
- **Realize the consumer is buying an experience - not a ticket or room**

Travel Industry Segment Briefs:

Hotels: Revenues up 0.6% in 2000, predicted sound for 2001.

- U.S. hotels reported 63.5% occupancy for full-year 2000, an increase of 0.6% over 1999, according to Smith Travel Research. It was the lodging industry's first full year gain since 1995. The average room rate was \$85.24 in 2000, while revenue per available room (REVPAR) was \$54.15. According to *Travel Advance*, Mark Lamanno, president of Smith Travel Research states: "We are cautiously optimistic about industry operating performance for 2001. Barring a major economic slowdown, we anticipate flat to slightly higher industry occupancy with room rate growth remaining comfortably above inflation for full year 2001."

Airlines: Mergers, complaints, and continued growth

- Airlines transport approximately 600 million people annually according to the U.S Transportation Department.
- Congress is becoming concerned about pending airline mergers. Up for merger are United and USAirways, American and TWA, and Delta and Continental. Congress is considering the issue as indicated by a recent Judiciary Committee hearing titled "Airline Consolidation: Has It Gone Too Far?"
- The Inspector General of the Transportation Department is expected to release a study in 2001, ordered by Congress last year, on how well the airlines are meeting the so-called customer service commitments they devised in 1999 to head off a passenger bill of rights threatened by several members of Congress, which would have imposed specific standards enforceable by the Transportation Department.
- One-quarter of all flights, affecting 119 million people were delayed, canceled or diverted in the first nine months of 2000 according to the U.S. Transportation Department
- Passenger complaints are up, but so are bookings. Passenger traffic increased 5% in 2000 according to Air Transport Association. Planes were 72.8% full in 2000 compared to 71.3% full in 1999. Domestic passenger traffic increased 2% in 2000, while international traffic jumped 14.3%. The top five foreign countries in passenger traffic to and from the U.S. were, in order, the U.K., Canada, Mexico, Japan and Germany.
- *Money Magazine* reports that airfares are predicted to increase 5%-10% in 2001 according to one airline analyst, barring a serious recession. Ticket prices increased 3.8% in 2000 according to the Air Transport Association.

Convention/Meetings: Looking For Fun & Convenience

There are more options in meeting/convention sites than ever before. Thus, competition has grown and it is becoming a "buyer's market." In numerous research studies, meeting planners and convention goers tell us the following:

- Conventions and meetings held in fun and exciting destinations draw larger attendance. Top choices are destinations such as San Antonio, New Orleans, Savannah, Chicago, etc. where walking scale and ease of arrival/meeting/playing are ensured.
- There must be sufficient *quantity and quality* of hotel rooms within convenient walking distance – preferably directly connected to the meeting facility.
- Flexible-use space is what they most likely seek.
- Easy load and unload of trade show materials is important.
- Parking must not be an issue.
- A diverse selection of restaurants, shops and attractions must be close – preferably within walking distance.
- Superb service at the meeting facility is expected.
- Security is always an issue.
- Disability access is expected. Especially for any type of government meeting, security and accessibility are essential.

A study of convention and meeting centers conducted by *Economic Research Associates* is summarized as:

- Public investing for economic impacts is like any other leveraged investment. There is a possibility of negative leverage as well. Economic impacts can be less than zero.
- It takes more than a meeting facility to get conventions and conferences to come to your community.
- Contrary to a popular misconception, convention and conference centers are designed to lose money.
- How you operate a facility on a daily basis has a great deal to do with how much economic impact you can achieve.
- Some communities should stop feeling guilty about their secret agendas. It is okay to want a civic facility.

Amtrak: Grow or die

- *The Wall Street Journal* reports that at a time of chaos for air travelers and congestion on the highway, this should be Amtrak's moment in the sun. Yet all too often the nation's passenger rail service remains bogged down by crumbling infrastructure, discontented employees, unhappy passengers and American's longtime ambivalence toward rail travel. Now time is running short for Amtrak. A 1997 edict from Congress says the rail line must operate without federal subsidy by 2003, or face restructuring or liquidation.

Cruise Lines: Still Growing

- Cruise Lines International reports that some 6.9 million North Americans took a cruise in 2000, compared with 3.6 million in 1990. The cruise industry enjoyed an 11% increase in 2000 over 1999, and a 16% growth in passengers. 6.8 million people took a cruise in 2000, almost 1 million more than in 1999. At least 13 new ships will enter service in 2001. Thus, RTM predicts more growth for the cruise industry, with more bargains to be found.

Theme Parks: Attendance up slightly, prices up too

- Increased ticket prices are the biggest news in major theme parks. The average single ticket price is expected to be approximately \$40-\$50 for a single day adult ticket in 2001, with some breaking the \$50 mark (Walt Disney World, SeaWorld Orlando, Tampa Bay Busch Gardens). Many major theme parks have recently announced increases.
- Attendance in 2000 for theme parks was up 3%, according to TIA, with 175.1 million visitors.
- The Magic Kingdom at Walt Disney World in Orlando was the most visited park in North America in 2000, with 15.4 million visitors. Disney in Anaheim was #2 with an estimated 13.9 million visitors. Epcot at Walt Disney World was #3 with an estimated 10.6 million visitors and Disney-MGM Studios at Walt Disney World was #5 with an estimated 8.3 million visitors.

Museums: Marketing to the rescue

- According to the American Museum Association, the number of visits to U.S. museums will have topped 1 billion in 2000, up from 865 million in 1999. Only the movies sell more tickets at 1.5 billion per year. *Forbes Magazine* reports that although there has been an increase in the major museums, much of the increase comes from smaller, more eccentric institutions.
- RTM sees museums becoming more marketing savvy – and demonstrating more appeal to the masses as these non-profit organizations continue to seek new funding from their constituencies rather than foundations and “non-ticket fund sources.”

Camping & RVs: Popular and growing

- According to the American Camping Association there are 8,500 – 10,000 existing camps in the U.S., approximately 6,200 camps are operated by nonprofit groups including youth agencies and religious organizations and 2,300 by privately owned independent for-profit operators.
- According to TIA, camping is the number one outdoor vacation activity in America. One third of U.S. adults say they have gone on a camping vacation in the past five years. Camping vacationers tend to be married with children at home. The average age of travelers who go camping is 37 and their median household income is \$43,000.
- Recreation vehicles (RVs) sales are at a 7-year high, according to the *Recreation Vehicle Association*.

Gasoline Prices: Get Ready For Significant Increase

- After falling during the last half of 2000, gas prices are poised to jump to new highs. Low fuel reserves, scheduled refinery maintenance and the California electricity shortage could combine to drive prices past \$2 per gallon. *The Wall Street Journal* says gasoline prices also will be hurt by the rising price of natural gas. Will this price increase affect travel? Yes, but it will not severely diminish travel. Most consumers will react by choosing to book bargain airline fares when possible and otherwise spending the extra money for gasoline costs while on vacation.

Gambling: Growth

- Gambling continues to be big business. The American Gaming Association reports that in 1999, the gaming industry had Gross Gambling Revenue (GGR) of \$58.2 billion. (GGR is the amount wagered minus the winnings returned to players - the equivalent of 'sales,' not 'profit.')
- Some form of gaming-entertainment is now legal in 48 states, and there were 154 million visits to casinos in 1995 (the last year with available figures)
- TIA reports that gaming accounted for 72.8 million person-trips in 1999. They also report that gambling travelers are more likely than U.S. travelers overall to travel by air (24% vs. 18%) and include a stay at a hotel, motel, or bed and breakfast establishment (76% vs. 52%). Trips including gambling last an average of 4.0 nights. Few (10%) trips that include gambling have children on them. Gambling travelers are also more likely than average U.S. travelers to be older; the average age of the head of household is 52 vs. 48.

Sports Related Travel: Becoming more tourism marketing savvy

- According to TIA, two out of five U.S. adults (38%) attended an organized sports event, competition, or tournament as either a spectator or as a participant while traveling in the past five years. The most popular organized sports event to watch or participate in while traveling is baseball or softball, with 17% of U.S. adults traveling 50 miles or more to see or play in a baseball or softball game in the past five years. This is followed by football (15%), basketball (9%), and auto/truck racing (8%).
- RTM noted in 2000 that many destination marketing organizations are beginning to quantifiably measure the economic impact of sports travel. For instance, one of our clients found that the most lucrative sports travel market for their community was girls' basketball. They found that for each girl player, an average of 3 other people visited, and they spent significantly more than boys' sports travelers.

Outdoor dramas:

- National attendance has hovered around the 2.5 million mark – with 1994 and 1995 being the only two years above that number since 1988, according to a report conducted by Dr. Larry Gustke for the *National Institute For Outdoor Drama*. Attendance in 1998 was down about 1% over 1997.

Other Trends and Tidbits:

U.S. Travel and Tourism Employment, Revenues, Taxes, etc.

- In the U.S., travel-generated employment in 1999 was 7.8 million jobs.
- Travel-generated payroll in the U.S. for 1999 was \$157.8 billion.
- Total travel expenditures in the U.S. in 1999 were \$541.1 billion.
- Total travel-generated tax revenues in 1999 were \$86.7 billion.
- During 1999, spending by U.S. resident and international travelers in the U.S. averaged \$1.42 billion a day, \$59.4 million an hour, \$989,300 a minute, and \$16,400 a second.

(Source: TIA)

Push to establish 511 as the national motorist travel info number

- *USA Today* reports that several cities and states are pushing to have a national 511 number available to make life on the road easier. Cincinnati, Phoenix, Minnesota and Kentucky plan to have the 511 service running by summer, 2001. But, it could still be four to five years before the number is available to most of the nation.

What Is Ginger? Will It Affect Travel?

- Enormous and tantalizing media hype has been centered on the new invention code-named "Ginger" by its creator, Dean Kamen, president and owner of DEKA Research & Development Corporation. Seemingly every major newspaper and publication in America has had a teaser story on the new invention that is scheduled to make its debut in 2002. Amazingly the story has not been leaked, but some sources believe that the new invention is some sort of personal hover scooter or personal transportation device. Kamen claims the product will be "an alternative to products that are dirty, expensive, sometimes dangerous, and often frustrating, especially for people in the cities."

Singles, Gay/Lesbian Travel: Spending more and traveling more

- "Singles" travel is on a rapid increase as well, with trips designed for individual travelers (married or single) without partners.
- Gays and lesbians now account for approximately 10% of the U.S. travel industry, according to the *International Gay & Lesbian Travel Association*. They are four times more likely to hold a valid passport than the average American.

Minorities: Increasing travel impact

- TIA reports that African-American travel volume is up 16 percent from 1997 to 1999 (increasing from 60.1 million to 69.6 million person-trips). This is much higher than the one percent increase for travelers overall during the same time period. Sixty-four percent of African-American travel is for pleasure and 21% is for business trips. Nearly half of all person-trips are made to visit friends or relatives (46%). Compared to travelers overall, nearly three times as many person-trips involve group tours (8% vs. 3%).
- TIA also reports that Asian-American travel volume has grown 7 percent from 1997 to 1999, increasing from 28.5 million to 30.4 million person-trips, though the share of total travel volume has been flat for the past two years—staying at three percent each year. Sixty percent of Asian-American travel is for pleasure, and they visit friends and relatives most often (36%), followed by entertainment (17%) and outdoor recreation (8%). Business trips represent three in ten of the total person-trips taken by this group, a significantly higher share compared to all travelers (28% vs. 21%). Asian-Americans have a much higher tendency to travel in winter compared to total U.S. travelers (28% vs. 20%).

Convention and Visitor Bureaus

- The average occupancy tax rate nationally is 12% according to *Travel Industry of American (TIA)*. Further, TIA reports that the highest amount in major destination cities include Houston (17%) Columbus (15.75%) Seattle (15.60%). Averages in the Southeast include Atlanta (14%), New Orleans (11%), Raleigh (12%), Charlotte (12%), Jacksonville (12.50%), Knoxville (13.25%), Memphis (13.50%), Orlando (11%), and Norfolk (11.50%).
- Top domestic marketing and promotion expenditures by states include (Source: TIA):
 - Hawaii (\$60.0 M)
 - Illinois (\$55.5 M)
 - Florida (\$54.3 M)
 - Pennsylvania (\$34.4 M)
 - Texas (\$30.9 M)
 - New York (\$20.8 M)
 - Virginia (\$19.2 M)
 - Iowa (\$17.6 M)
 - Louisiana (\$16.8 M)
 - Wisconsin (\$15.5 M)

Top 10 U. S. City Destinations For Overseas Travelers To US in 1999 (Source: TIA):

	Number of Arrivals
• New York	5.5 Million
• Los Angeles	3.6 Million
• Miami	2.9 Million
• Orlando	2.9 Million
• San Francisco	2.8 Million
• Las Vegas	2.6 Million
• Oahu/Honolulu	2.2 Million
• Washington, D.C. (Metro)	1.3 Million
• Chicago	1.3 Million
• Boston	1.2 Million

Top US Population Trends:

1. **Aging Population**
2. **Increasing Affluence**
3. **Rising Educational Levels**
4. **Household Variety**
5. **Cultural Diversity**
6. **Growing Influence of Women**



Glossary of Terms

AAA - American Automobile Association

ABA - American Bus Association

ASAE - American Society of Association Executives

ASTA - American Society of Travel Agents

ATA - Air Transport Association

Attractor - A significant tourist attraction, which compels visitation. The primary "must sees" in an area. The top reasons a tourist would choose to visit this area. Examples would be: an ocean, a state park, the tallest mountain in the state, birthplace of a president, a major attraction which actually compels a visitor to get off a major highway and come visit this area.

Attraction - Any visitor service or product which tourists would enjoy visiting or using. An attraction may not be an "attractor" but can still be an attraction. To be considered an attraction, a product must be:

- A. Findable (clearly located on maps and street addresses, and directions provided). If tourists can't find the facility, it is not a tourist attraction.
- B. Hours of operation clearly denoted in any and all promotional materials (if a tourist arrives only to find the attraction closed, it is not an attraction).

Examples of attractions include everything from a theme park that attracts over a million visitors a year, to a produce stand by the side of the road.

B&B - Bed and Breakfast inn

CAA - Canadian Automobile Association

CVB - Convention and Visitors Bureau. (See also DMO)

Carrying Capacity - *Carrying capacity* refers to the number of visitors that can adequately be accommodated with existing infrastructure including lodging, dining, public bathrooms, roads, parking, etc. It describes the ability of an area to facilitate visitation. For example, a destination that has exceeded its carrying capacity will have traffic problems, long lines at bathrooms, dining facilities, not enough hotel rooms, etc.

Consumer Show

A product showcase for the general public. Differs from a "Trade Show" as a trade show generally targets industry professionals. Consumer Shows target the consumer. Often there is a charge to get into the show.

Conversion - Getting "heads in beds" or otherwise closing the sale. Differs from "hospitality." Hospitality is being warm, friendly and helpful. Conversion is active selling.

Destination - The end point of a trip. This can be a town, a resort, or a stand-alone attraction. Not to be confused with a 1-2 night stopping place that's perhaps part of a 7-night overall trip.

DMO - A destination marketing organization (such as a convention and visitor bureau).

DNR - Department of Natural Resources

DOT - Department of Transportation

ESSTO - Educational Seminar for State Travel Officials

FIT - Acronym with multiple meanings. RTM has seen it used to mean the following:

- *Foreign individual traveler*
- *Frequent individual traveler*
- *Fully independent traveler*
- Usually a "FIT Package" will include lodging, meals, and attractions.

Fulfillment Piece - Promotional literature, video, or other material that is sent in response to an inquiry. Usually contains full trip planning information.

GLAMER - Group Leaders of America Travel Show

Group Tour and Group Leader

Group Tour: A travel agent type company which plans motorcoach and other types of group trips.

Group Leader: A small, informal group, such as a church group, scout troupe, or social group. Usually one person plans the activities for the group. Some travel shows target these planners such as *GLAMER*.

HSMIA - Hospitality Sales and Marketing Association International

Hospitality - A general term used in travel & tourism describing the "hospitality industry"; refers to the general greeting, welcoming, food service, etc.

IACVB - International Association of Convention and Visitor Bureaus

IATE - International Association of Travel Exhibitors

IDRC - International Development Research Council

ISTEA - Intermodal Surface Transportation Efficiency Act

Inquiry - A request for more information about an attraction or destination.

Interpretation - Print materials, signage, narration, guided tours, and anything that “interprets” the site for the visitor. Interpretation helps the customer “interpret” the experience and explains why a particular product is valuable. Interpretation adds value and meaning to the experience.

MISA - Motorist Information Services Association

MPI - Meeting Professionals International

NCBMP - National Coalition of Black Meeting Professionals

NCSTD - National Council of State Travel Directors

MNNM - National Motorcoach Marketing Network

NPF - National Park Foundation

NTA - National Tour Association

OMCA - Ontario Motorcoach Association

OTD - Office of Tourism Development

PR - Public Relations

PRSA - Public Relations Society of America

Product Extension

An add-on product or service, which enhances the experience of your product and generates additional revenue. Examples might include:

- A restaurant that introduces “specially prepared hiking picnic meals” to increase their sales.
- Adding a vineyard to a resort.
- A hotel that adds a spa or spa services for additional revenues.
- A state park that offers guided wildflower tours (for a fee).

Product Life Cycle

Glossary of Terms

The cyclical pattern of demand for most products from "new and exciting" to "old and dated." Almost all products (tourism and otherwise) have these cycles. One must constantly monitor where they are on the "product life cycle" and plan for reinvention. Even Disney has to constantly reinvent itself to continue to earn market excitement and interest.

RSA - Receptive Services Association

RV - Recreational Vehicle

Rack Card - The typical tourism brochure sized 4" x 9" and used primarily in tourism racks. Also known as a "teaser."

Reassurance Sign - When trying to locate an attraction, especially when the route is long and unclear, it is critical to offer "reassurance signs" that tell the visitor they are indeed going the right way.

Receptive Operator - Someone who plans to "receive" your motorcoach or tour group. They may plan your lodging, meals, attraction visits, etc. for a fee or commission.

Reconnaissance - An on-site evaluation of an attraction or destination from the perspective of the customer. Best performed by an outsider who is not familiar with the location and who is trained in fair and scientific methods of evaluation.

SATW - Society of American Travel Writers

SGMP - Society of Government Meeting Planners

SMERFs - Social, military, educational, religious, and fraternal market segments. Usually targeted and separately tracked by DMOs.

Step-on Guide - A highly knowledgeable guide whom "steps-on" an incoming motorcoach and provides narrative interpretation for the experience. Some CVBs offer step-on guides for free. Sometimes an independent company offers this service for a fee.

Strategy vs. Tactic - A strategy is an overall statement of how you will accomplish your specific objectives. Tactics are actual action steps with deadlines, budgets, and responsibility assignments.

TAC - Tourism Advisory Committee

TDA - Tourism Development Authority.

TIA - Travel Industry of America

TODS - Tourist Oriented Directional Signage

TTRA - Travel and Tourism Research Association

Tactic (* see “strategy vs. tactic” above)

Teaser Piece - A teaser piece can either be a rack brochure (*see “rack brochure” above), or a mailer, giveaway, or some other promotional piece that is intended to “tease” the receiver into taking a specific action.

Trade Show - A product showcase for a specific industry. Generally it is not open to the public. Differs from a “Consumer Show” in that a trade show targets the professional industry, while a consumer show targets consumers.

UMA - United Motorcoach Association (formerly United Bus Owners Assn.)

USTDC - United States Travel Data Center

VFR - Visiting friends and relatives

VFRM - Visiting friends and relatives of the military

WTM - World Travel Market

WWW - Wide World Web

Wholesaler - A company that purchases large blocks of rooms, tickets, etc. and then resells to either the public or to other travel professionals. Wholesalers only sell their own inventory (as opposed to a travel agent who can sell any product).

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