



RV Travelers Study Summary

Project Directors:

Dr. Anne Hardy, University of Northern British Columbia

Dr. Ulrike Gretzel, Laboratory for Intelligent Systems in Tourism, Texas A&M University

Research Staff:

Diana Kutzner

Jovan Simic

Kyung Hyan Yoo

Leslie Rasch

Melanie Purifoy

Kelly Lee

Project Sponsors:

BC Real Estate Foundation

Elkhart County Convention & Visitors Bureau

Tourism British Columbia

Northern British Columbia Tourism Association

Northern Rockies Alaska Highway Tourism Association

Tourism Dawson Creek

Texas Association of Campground Owners

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Introduction to the Research

According to the Recreation Vehicle Industry Association, ownership of recreational vehicles (RVs) has reached record levels in 2005 with nearly one in twelve U.S. vehicle-owning households now owning an RV and the annual retail value of RV shipments reaching US\$14 billion. The number of RV enthusiasts and RV buyers is likely to grow extensively in the US as well as Canada as the enormous baby boomer generation retires. However, a recent study conducted by the University of Michigan also shows that younger generations have become increasingly interested in RV related travel. The study found that Generation Xers exhibit interests in outdoor activities that are highly compatible with RVing. IBISWorld released a report in 2007 predicting increasing demand for new forms of purpose-built, long-stay and comfortable, but not expensive, accommodations, as well as new RV parks in tourism areas.

The drive tourism industry, including recreational vehicles, is increasing rapidly in Canada. The most recent figures for the province of British Columbia (BC) reported by Statistics Canada were collected in 1996 and suggested that more than one million non residents took a holiday in their own or hired motor vehicle. Go RVing states that per capita, Canada has a higher level of RV ownership than the USA, with 13% of the population owning an RV, compared to 10% in the USA. These figures, which have most likely increased, suggest that a summer influx of self drive travelers in regional and remote areas of Canada can dramatically change the nature of a town. These trends have the potential to significantly impact businesses and communities catering to RV travelers. However, apart from estimations of their numbers and demographic profiles, little research exists which explores RVers' motivations and belief systems.

Aim of the Research

The aim of this research was to develop insights into the RV market and particularly whether differences exist between various groups of RVers. It sought to capture RVers' motivations, expectations and perceptions as well as information search and decision-making behaviors.

Contributing Stakeholders

The stakeholders who have contributed financially towards this collaborative project are:

- Dr Anne Hardy and the University of Northern British Columbia
- Dr Ulrike Gretzel and Texas A&M University
- British Columbia Real Estate Foundation
- Elkhart County Convention & Visitors Bureau
- Northern British Columbia Tourism Association
- Northern Rockies Alaska Highway Tourism Association
- Tourism British Columbia
- Tourism Dawson Creek
- Texas Association of Campground Owners

Methods and Results

A research methodology including quantitative and qualitative methods (focus groups, in-depth interviews and self-completed surveys) was developed to reach the study goal. Dawson Creek, BC was selected as the study site as it represents an important RV destination

1. Focus Groups and In-depth Interviews

The focus groups were the first phase of research to be conducted. The goal of this phase was to gain insights into whether differences exist between caravan group RVers and independent RVers in terms of their motivations; behavior whilst RVing; perception of RV experiences; identification with RV lifestyle and perceptions of other travelers; decision making processes (how they make decisions and plan trips); and understanding of what makes a good RV'ing destination. Two focus groups were held on June 7th and 9th at the Dawson Creek Visitor Centre, comprising of caravaners and independents respectively. The groups were comprised of 12 individuals in each group.

The results of the focus groups informed the development of questions for the in-depth interviews. This phase sought to develop generalized findings regarding RVer motivations, expectations and behaviors. Incorporated into this aim was the objective to provide the stakeholders of this research project with important marketing information. The in-depth interviews were conducted between early June 2007 and late July 2007. 50 interviews were conducted with 25 independents (including 21 part timers and 4 full timers); and 25 Caravaners (including 23 part timers and 2 full timers).

Results of the Focus Groups and In-depth Interviews

The focus groups and in-depth interviews revealed that both caravaners and independents tended to be retired and saw the RV lifestyle as an opportunity for them to self actualize and realize their goals. RVing for them is about convenience, flexibility and fellowship. They believe it gave them a sense of freedom, self sufficiency and allowed them to have the time which they have deserved through their working and family lives.

Both types of RV travelers were also similar in their heavy use of technology, and their need for internet based information to plan their trips, GPS to find their way, and email and cell phones to communicate with family and friends but also with tourism-related businesses. Both groups described RV Friendly destinations as those which are easy to drive through in a large rig, contain RV parks with large sites, have facilities, services and amenities provided for RVers and contained friendly locals. Signage and parking emerged in both groups as important themes and critical for RV Friendly destinations.

However, the focus groups and in-depth interviews also suggested that some differences may occur between the two groups of RVers. Whilst social interaction forms a significant part of the RV experience, caravaners appeared to be more social. As a consequence they appeared to be more likely to attend rallies than independent travelers. They also appeared to be more aware of their presence on the road and of other travelers "gazing" at them in their rigs. Many see themselves as traveling with kindred spirits and feel they are often misunderstood as old slow driving retirees, or trailer trash.

This stage of research also revealed that caravaners were more cautious travelers. They planned their trips for longer periods of time. Caravaners also appeared to be more loyal members of RV clubs, seeking out their club's member campgrounds and arranging their stops around them. They also appeared to be more likely to have a written itinerary and to be more social travelers by seeking out interactions with other travelers at campgrounds.

Independent RVers also differed to caravaners as they appeared to be made up of two sub groups. One of these included fiercely independent RVers. This sub group of travelers, who appeared to be a minority within independent RVers, was delighted in avoiding any form of constraint. Freedom was the ultimate goal to these travelers and the notion of organized RV events and established tourism attractions were off-putting to this group.

2. Surveys

The objective of the survey was to obtain quantitative results to describe characteristics of RVers and to test whether significant differences exist between various groups of RVers. Intercept surveys were conducted at different locations in Dawson Creek, BC. This ensured that a variety of RV travelers was included in the sample.

The survey involved self-administered, paper-based questionnaires, including a total of 41 questions. These questions asked RVers about their travel behaviors, their trip planning, their perceptions of RV destinations, club membership and rally participation, technology use and personal characteristics. A total of 860 completed surveys were obtained.

Results of the Surveys

The RVers in the sample were serious RVers in that they have large vehicles, travel for long periods in their RVs, are members of one or often more RV clubs, and have been RVing for many years. When staying overnight they mostly stay at private RV parks but also public parks. Technologies such as cell phones, digital cameras, laptop computers, Internet, wireless Internet and navigation systems/GPS are frequently used by these RVers. Many participate in rallies. They mostly find out about these through their RV clubs. Rally decisions are to a great extent based on the location and the attractions the destination offers.

On their trip to/through Dawson Creek, BC, most traveled in groups of 2 adults with no children. A majority of them was headed to Alaska and only spent a limited time in British Columbia. Of the time spent in British Columbia, most was spent in Northern BC. Neither the BC inside passage ferry accident nor high gas prices had an influence on their trip. Popular travel activities during the trip were visiting museums and historic sites, visiting parks, walking, hiking or cycling, shopping, and taking cruises and boat trips.

The surveyed RVers plan their trips long in advance but the planning seems to be mostly concentrated on the general route. Return dates and especially activities are flexible. The Milepost guide, word of mouth, visitor information centers and RV related sources are the most important information sources which inform the trip planning process.

Great RVing destinations are those which provide natural settings, scenery and lots to do and see, especially outdoor and cultural activities. Also a must is a good selection of high

quality, full service, and well-managed campgrounds. Being able to reach the destination and its attractions on good, safe roads with a large RV is also an issue. RV friendliness is important, as are low prices and good information/signage.

RVers in the sample were older, well-educated, retired and had moderate to high incomes. Most of them had a passport.

Several differences exist between RVers who travel in caravans and those who travel independently. Caravan travelers are more committed RVers in that they have larger RVs, travel longer in their RVs, use technology more extensively when RVing, are more likely to park in membership parks, are more likely to use RV clubs as information sources, more likely recognize Quartzsite, Elkhart and Livingston as RV capitals, and are more likely to participate in rallies. Organized entertainment at rallies is more important to them.

US RVers are different from Canadian RVers in that they are more likely to travel in their own Class A motor homes, more likely to list Alaska as their primary destination, are more likely to boondock as well as stay at private and membership parks, and engage in different activities than Canadian RVers. They are also more likely to mention Elkhart as the RV capital of the world and are more likely to use RV related sources for travel planning. In addition, they are more likely to plan their trip long in advance, to travel in caravans and to participate in rallies. They are also more familiar with the America's Scenic Byways program. Canadian RVers are more likely to stay overnight in public parks, travel to BC as their primary destination, and use information sources provided by the tourism bureau of the province. Canadian RVers are also more diverse in terms of their socio-demographics.

Differences also exist between those who engage in shorter RV trips and RVers who are on the road for extensive periods of time. Longer trips involve greater advance planning but also greater flexibility. Longer trips are less influenced by gas prices and more likely to involve overnight parking in commercial lots as well as membership parks. Longer trips are more likely to be taken by serious RVers and are less likely to include children. Those who travel longer spend more time in BC; however, those with shorter trip lengths spend a larger portion of their entire trip in BC.

Overall Findings

The following summarizes the findings of all three study components:

- **RVers seek out RV friendly destinations**

It is important to RVers that destinations cater to their needs and they will actively avoid those places which don't. RV friendliness means welcoming residents and businesses, high quality campgrounds with amenities that add to the convenience sought by RVers, and good RV-specific information and signage suitable for older RVers with large vehicles. Accessibility, safe roads and RV parking are essential. RV friendly are also those places which cater to the cultural and historic interests and support outdoor activities as well as destinations which allow RVers to enjoy scenic views and feelings of relaxation and freedom.

- **RVing is a rewarding lifestyle**

RVing is not just a form of accommodation or transportation. It is a lifestyle chosen to experience freedom, flexibility and fellowship while enjoying the conveniences of home. It is not about money; thus RVers are less influenced by gas prices, especially when they RV for extensive periods of time during the year. New experiences, meeting new people and self-actualization are aspects which make this lifestyle so appealing.

- **RVers plan with room for change**

A majority of RVers engage in often extensive planning long before a trip. Word of mouth, Internet, brochures such as the Milepost guide, and RV-related sources are main information sources for them. A lot of information search also occurs during the trip as most often only the general route is planned and things like where to stay and what to do are left open. Thus, wireless Internet, visitor information centers and signage are essential for them. They often have primary destinations or routes selected but take time to explore places on the way. Thus it is important to them to have a variety of campground facilities or boondocking areas available should they choose to stay somewhere on the spur of the moment.

- **Not all RVers are equal**

RVers seem to differ in terms of the degree of social interactions they seek (e.g. whether they travel in groups and interact with other travelers), their commitment to RVing (expressed in terms of the size of their RV and membership in RV clubs but also the time they spend RVing every year, the length of their trips, and whether they have other residences and engage in other forms of travel) as well as the degree to which they plan their trips.

- **Rallies are not for everyone**

Rallies seem to attract more committed and more social RVers. Location and area attractions are important factors which influence rally participation decisions. Rallies influence destination image in that they add to the perceived RV friendliness of the destination. RV Clubs are the most important source to find out about rallies.

- **Today's tent campers are tomorrow's RVers**

RVing seems to be a natural progression from tent camping and backpacking as one becomes older and needs more convenience. Most were already looking at RVs while tent camping. The natural evolution of the RVer continues with the purchase of ever larger vehicles. RVs are rewards to their owners, and also a means to persuade spouses to engage in RVing.

- **RVers are techies**

Technology provides RVers with important travel information and a means to communicate with family, friends and other RVers. Technology also constitutes a way to manage one's life. Cell phones, digital cameras, laptops, Internet, navigation systems and wireless connections are widely used by RVers despite their older age. RVers are very technology savvy and want to be able to use their technologies wherever they go. They also want destinations and businesses to communicate with them through these technological means.

Third, destination marketers can only attract RVers if they effectively communicate with them. RVers want to be understood, recognized and targeted for marketing purposes. Destination Web sites should include RV-specific information (such as where to park, accessibility of certain attractions, lists of campgrounds and state/provincial parks, locations of RV dump sites, etc.). Brochures should represent RVers. Navigation systems should include tourism-specific information such as campground locations. En route information is critical to RVers; therefore, communication specifically with RVers also needs to occur through visitor centers, signage, and coupon books. Communication appeals should center on freedom and fellowship, natural beauty, local culture and activities, RV friendliness, as well as opportunities for self-actualization. Moreover, marketing efforts need to recognize that the market is not homogenous and different groups of RVers exist.

Fourth, RVers are the best marketers. Word of mouth behavior is critical and should be encouraged. Also, opportunities to create online representations of their experiences which can be shared with others cater to both their social behavior as well as their engagement with and dependence on technology.

Finally, RVers are flexible in their travel plans and actively seek out places which cater to their needs, whether these are destinations, attractions or campgrounds. Being able to compete for RVers thus requires a deep understanding of their motivations and preferences.

For further details on this project please contact:

Dr Anne Hardy
Outdoor Recreation and Tourism Management Program
University of Northern British Columbia
Prince George
British Columbia, V2K 5N4, Canada

email: hardya@unbc.ca

OR

Ulrike Gretzel
Laboratory for Intelligent Systems in Tourism, Dept. of Recreation, Park and Tourism
Sciences, Texas A&M University
2261 TAMU
College Station
Texas, 77843-2261, USA

email: ugretzel@tamu.edu