

OTRD Study of Winter Texans

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Background

- **The Oklahoma Tourism and Recreation Department has been interested in targeting Winter Texans for many years. A recent survey conducted by Decision Analysts confirmed that Winter Texans were prime prospects to visit the state.**
- **Based on secondary research conducted by the University of Texas-Pan American (UTPA), as well as analysis by the state of Texas, it is clear that Winter Texans represent a very large market. There are as many as 1.3 million Winter Texans who visit Texas each year, over 200,000 of whom visit the Rio Grande Valley.**
- **Given the size of this market, the OTRD wants to persuade Winter Texans to stop in Oklahoma on their way to or from Texas.**
 - **Consideration is also being given to staging a first-ever Winter Texan Rally, a three-day event that would feature a variety of displays, performers, and activities.**

Objectives

1. **Better understand who the Winter Texan is demographically and psychographically**
Specifically, this assessment includes:
 - a) **Breaking down the share of Winter Texans coming from each of the qualifying states**
 - b) **Identifying travel habits of Winter Texans across a variety of measures, including months traveled, typical length of stay, final/total destinations, destinations visited to and from Texas, routes traveled, preferred mode of transportation to and from Texas, trip planning, and housing while in Texas**
 - c) **Documenting media and internet usage habits among Winter Texans**
 - d) **Classifying differences for the aforementioned measures among those who own RVs (RV-ers) vs. those who don't (Motorists)**

2. **Gauge interest in the Winter Texan Rally, including by segments, RV-ers vs. Motorists, etc.**
Specifically, this assessment includes:
 - a) **Determining the best month to hold the rally**
 - b) **Assessing the share of Winter Texans who would change their plans to attend the rally**
 - c) **Gauging interest before costs are introduced vs. post-cost interest**
 - d) **Finding out what else would convince Winter Texans to stop and spend some time (and money) in Oklahoma**



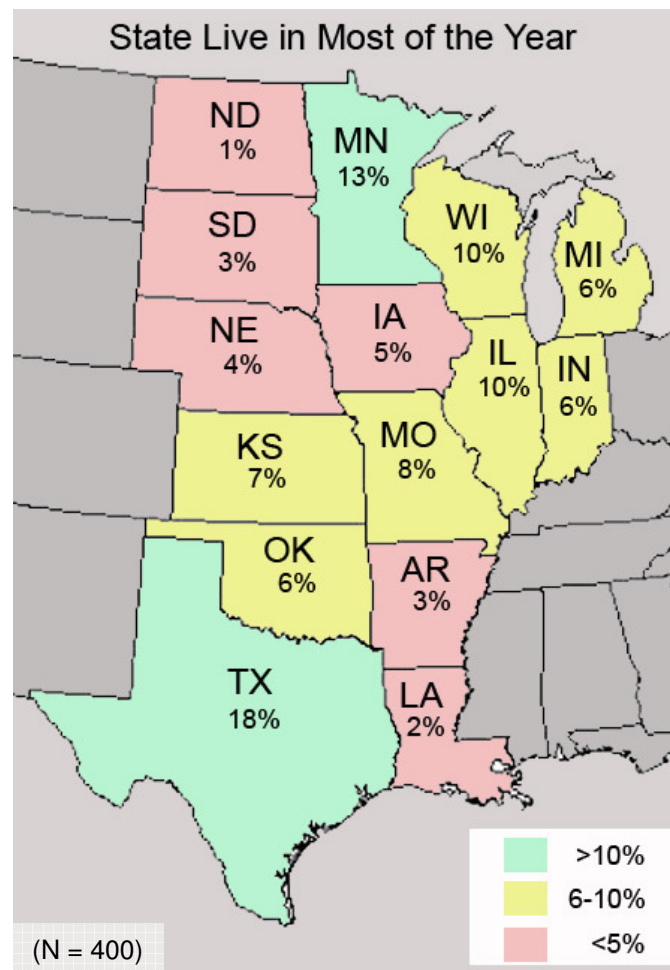
Methodology - Sample

- Interviews were conducted online from mid-December, 2008 to early-January, 2009.
- Respondents were contacted from qualifying states. Sample included.
 - 150 RV-ers* and 250 Motorists
 - 200 males and 200 females
 - 80 respondents age 45-54, 226 respondents age 55-64, and 94 respondents age 65+; the average age among respondents is 60 years-old
 - To qualify, each respondent had to:
 - Have spent at least part of the winter months in Texas (non-Texans) or in a warmer part of Texas (Texans) in the past 5 years
 - Live in a qualifying state year-round: Arkansas, Illinois, Indiana, Iowa, Kansas, Louisiana, Michigan, Minnesota, Missouri, Nebraska, North Dakota, Oklahoma, South Dakota, Texas, or Wisconsin

* RV owners (RV-ers) owned a motor home, fifth wheel trailer, pop-up trailer, travel trailer, or truck camper

Methodology - Home State of Respondents

- Aside from Texans wintering in a warmer part of the state (18%), Minnesotans made up the next greatest share of Winter Texans interviewed (13%).
 - Illinois and Wisconsin residents were also interviewed, accounting for 10% each.





Methodology - Interview

- **Question areas included:**
 - **Travel habits to Texas or warmer parts of Texas during Winter months over past 5 years**
 - **Consideration of self as Winter Texan**
 - **Typical length of stay/years going to Texas as Winter Texan**
 - **Final/other destinations visited in Texas**
 - **Destinations visited going to/from Texas**
 - **Preferred mode of transportation to and from Texas**
 - **Routes taken to and from Texas; interstate vs. byways; familiarity with toll roads**
 - **Housing when in Texas**
 - **Planning of trip: time in advance, information sources used, gender responsibility**
 - **Internet and media usage as Winter Texan**
 - **Plans to go/not go to Texas again and reasons why not**
 - **Pre-cost interest in Winter Texan Rally: month to hold; familiarity with similar rallies**
 - **Post-cost interest in Winter Texan Rally: willingness to change travel plans**
 - **Driving comfort of RV-ers off-Interstate in mid-sized cities**
 - **What could encourage visitation to Oklahoma**

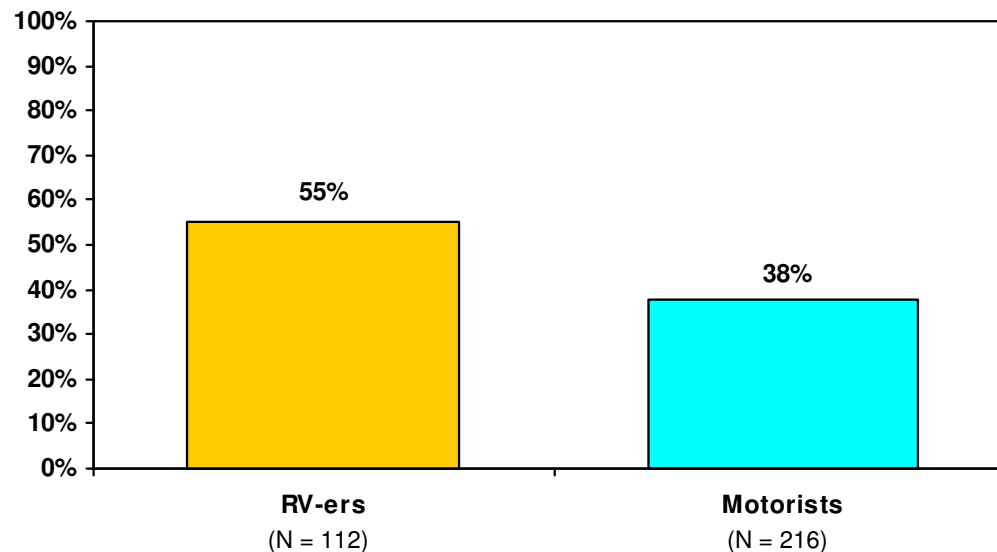


Findings
Profiling The Winter Texan

Incidence of Winter Texans

- **6% of RV-owners in qualifying states (outside of Texas and Oklahoma) have spent at least part of the winter months living in Texas sometimes during the past five years.**
 - 1% of motorists.
 - **Note: Since motorists outnumber RV-owners by 9:1, motorists account for most Winter Texans.**
- **Interestingly, not all people who spend part of their winter in Texas consider themselves to be “Winter Texans”.**
 - **RV-ers are significantly more likely than Motorists to view themselves as Winter Texans.**

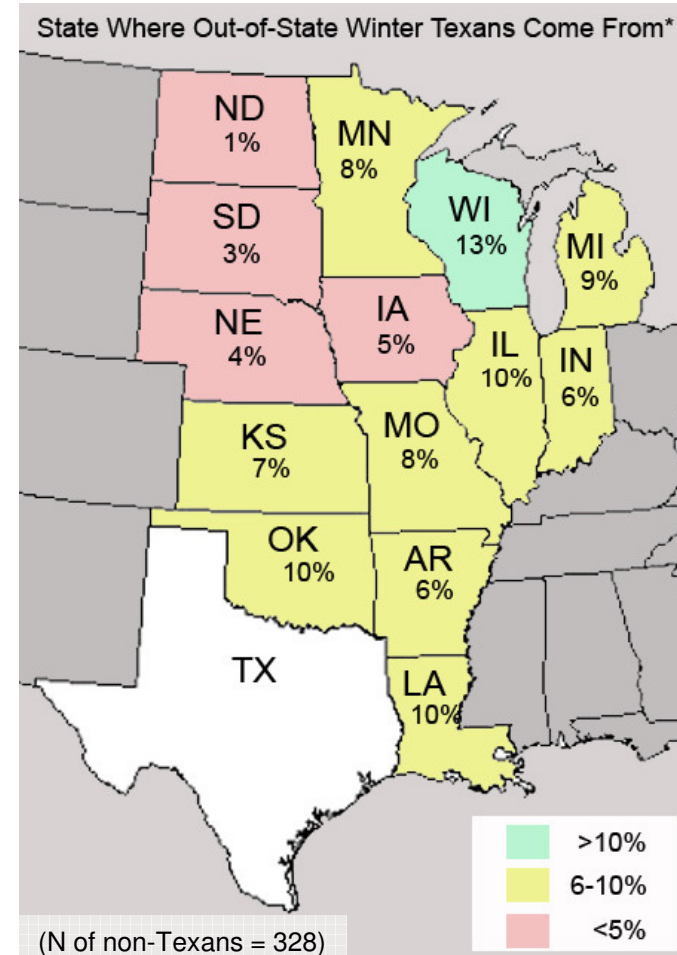
% Consider Self A Winter Texan



Home State of Winter Texans (adj.)

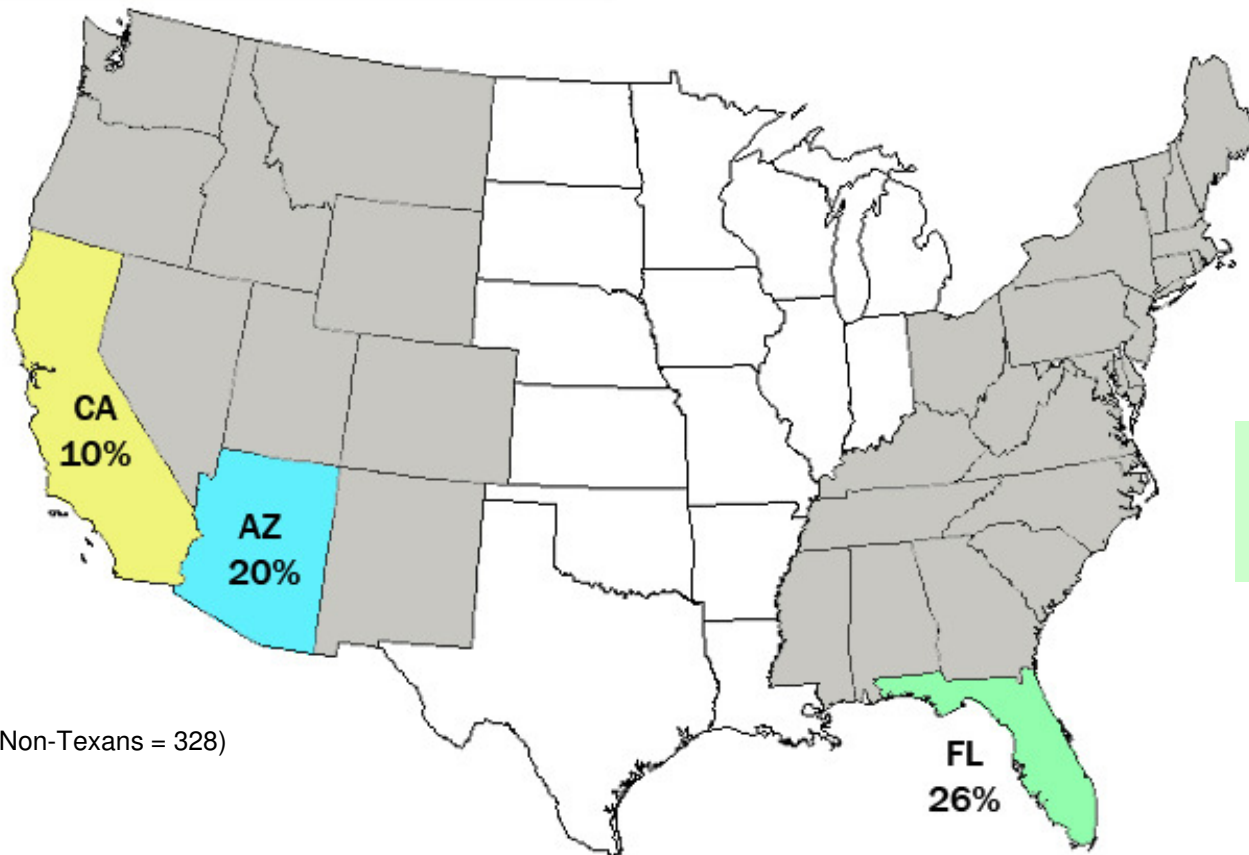
- Adjusting the sample composition for the actual population sizes of the states and removing Texans from the base reveals the proportion of Winter Texans that come from each target state.
- Aside from Texans wintering in a warmer part of the state, Wisconsin is the most common home state that Winter Texans live in for most of the year.
 - Five states in “Big 10 Country” (Wisconsin, Illinois, Indiana, Michigan, Minnesota) account for nearly half (46%) of Winter Texan visitors from outside of Texas.
 - Neighboring states of Oklahoma, Louisiana, and Arkansas account for over 25%.

** - NOTE: %'s shown are after adjusting for the population of each state relative to the number of respondents screened in the research panel by state, and excluding Texans.*



Other States Live In During Winter

- The most popular other states that Winter Texans live in during the winter are the “snowbird states” of Florida (26%) and Arizona (20%) as well as sunny California (10%).
 - 55% report living in at least one other state (besides their home state and Texas) during the winter months.



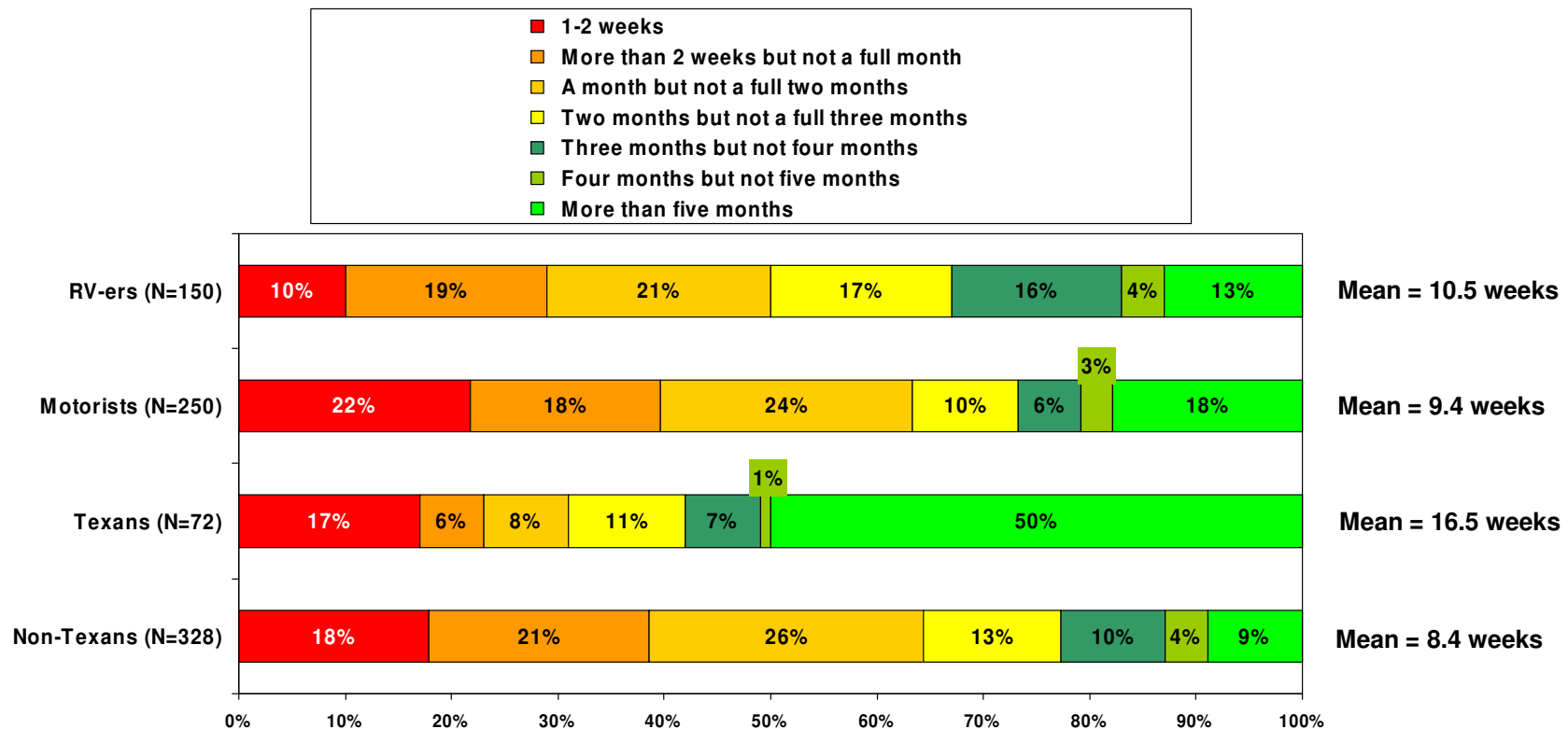
(N of Non-Texans = 328)

Number Of States Live In During Winter (Other Than Home State)

	Non-Texans
1	45%
2+ (Net)	55%
2	28%
3	14%
4+	13%
N=	(328)

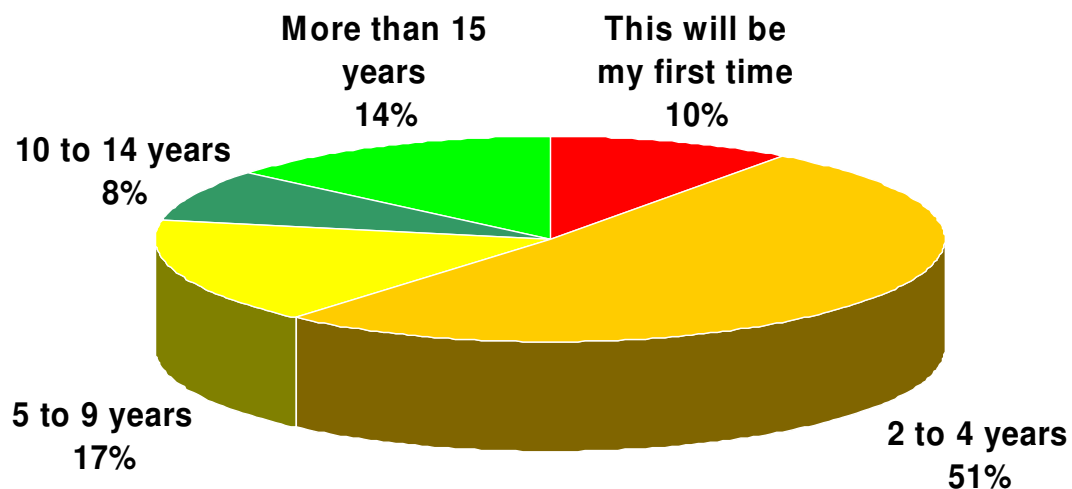
Length of Stay In Texas

- Not surprisingly, Texans stay significantly longer as Winter Texans than do visitors from outside the state.
 - RV-ers also stay in Texas a bit longer on average than do Motorists.



Years Going to Texas

- Most have been going to Texas as a Winter Texan for less than 5 years.
 - However, the mean number of years spent as a Winter Texan is about 7 years, as nearly a quarter of Winter Texans have been going to Texas for over a decade.



Mean = 6.6 years Median = 3.0 years

(N = 400)

Length of Stay / Years Going to Texas (adj.)

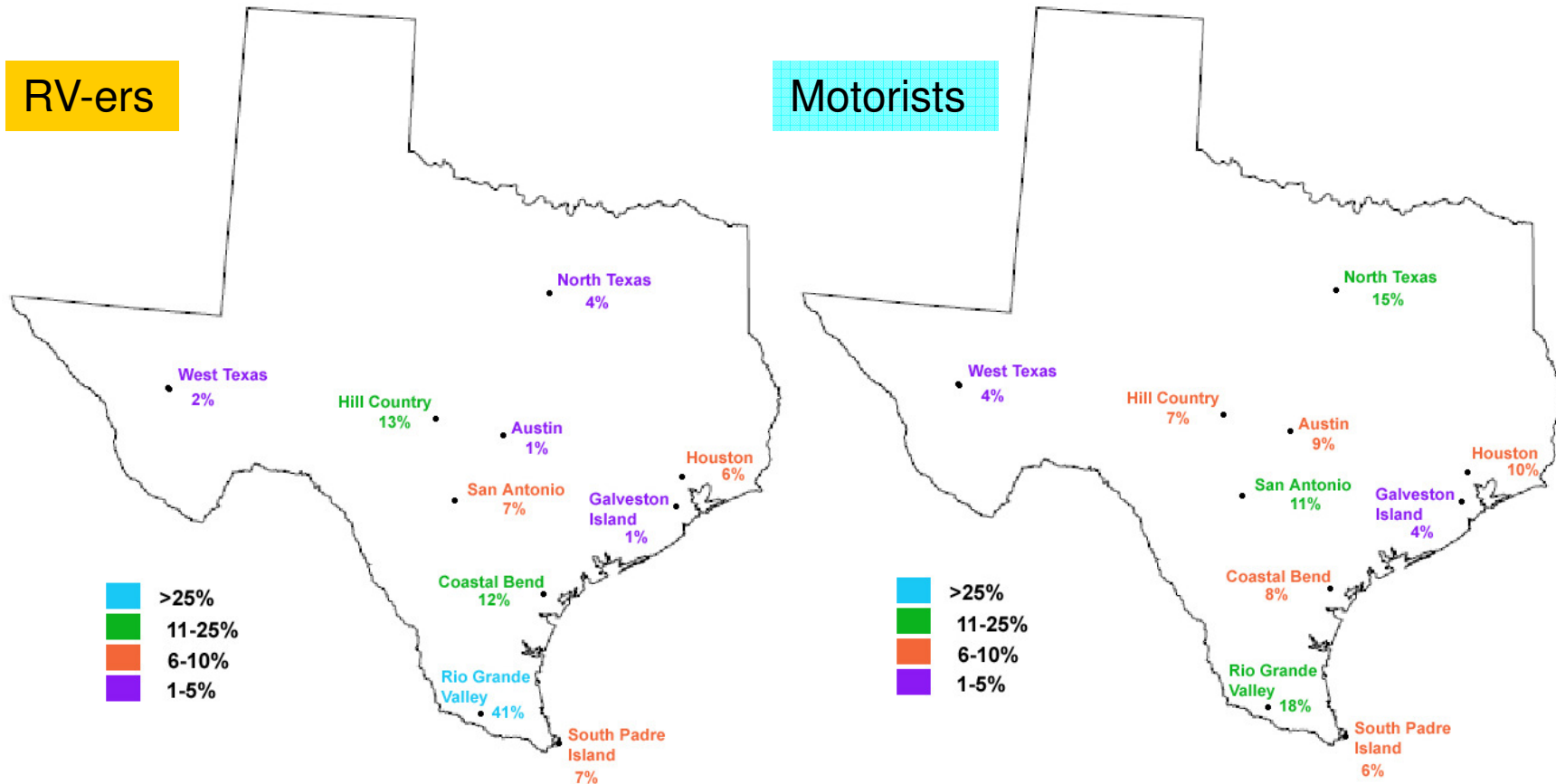
- The previous 2 slides profile people who winter in Texas, giving equal weight to each person. However, if one can imagine walking around a Texas winter town, you would be more likely to find those visitors who come more often and who stay longer.
- Weighting the data for these factors indicates that Winter Texans indeed do stay for quite a long time and return there year after year.
 - Those who stay for more than 5 months or have been going for 15+ years each account for about 40% of Winter Texans.

Length of Stay in TX	Weeks in TX During Winter	Pct of Respondents	Value Contribution	Pct of Visitors
1-2 weeks	1.5	18%	0.3	3%
3-4 weeks	3.5	18%	0.6	6%
1-2 months	6.5	23%	1.5	15%
2-3 months	11	13%	1.4	15%
3-4 months	15.5	10%	1.6	16%
4-5 months	20	3%	0.6	6%
>5 months	24	16%	3.8	39%
			9.8	
Years Going to TX	X In Past 20 Yrs	Pct of Respondents	Value Contribution	Pct of Visitors
First time	1	10%	0.1	2%
2-4 years	3	51%	1.5	23%
5-9 years	7	17%	1.2	18%
10-14 years	12	8%	1.0	15%
15+ years	20	14%	2.8	43%
			6.6	

(N = 400)

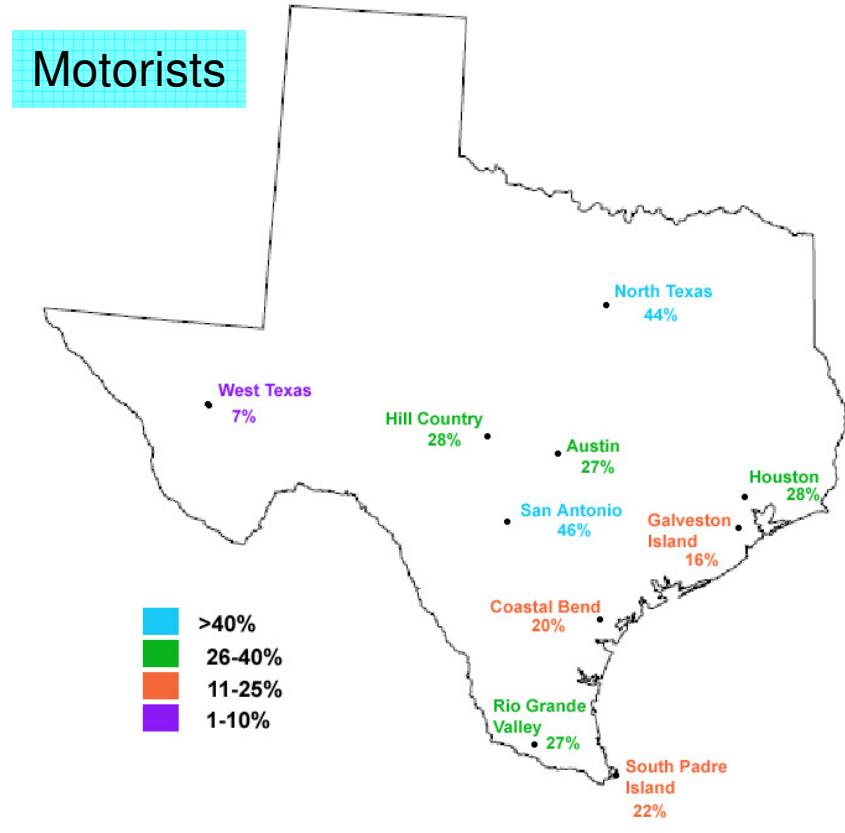
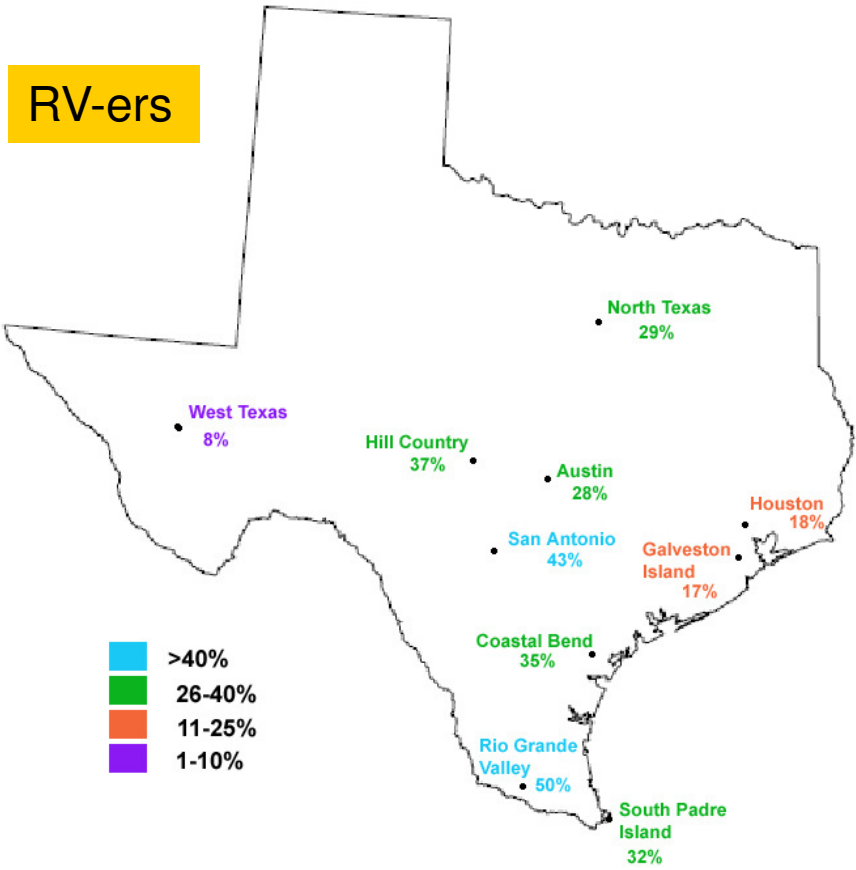
Final Destination in Texas

- RV-ers are far more likely than Motorists to go to the southern part of Texas for their final destination.
 - Rio Grande Valley is the most popular final destination among both groups.
 - Motorists are significantly more likely than RV-ers to end up in North Texas.



Total Destinations in Texas

- Half of RV-ers stay in Rio Grande Valley, and nearly half of Motorist stay in North Texas.
 - San Antonio is a central destination for both RV-ers and Motorists.





Type of Winter Residence in Texas

- Nearly two-thirds of RV-ers use an RV as their primary Winter Residence in Texas.

Primary Winter Residence

	RV-ers	Motorists
RV (Net)	63%	1%
RV I own to drive to Texas	59%	0%
RV I own and leave in Texas	3%	0%
RV I rent once I get to Texas	1%	0%
RV I rent to drive to Texas	1%	0%
Stay with a friend or relative	6%	30%
House (Net)	11%	21%
House I own in Texas	10%	17%
House I rent in Texas	1%	4%
Hotel/motel in Texas	5%	22%
Apartment/condo (Net)	7%	19%
Apartment/condo I rent in Texas	7%	15%
Apartment/condo I own in Texas	0%	4%
Mobile home (Net)	6%	2%
A mobile home I own in Texas	5%	1%
A mobile home I rent in Texas	1%	1%
Tent camping	0%	0%
Other	1%	4%
Own Property (Net)	77%	23%
N=	(150)	(250)

Total Winter Residence

	RV-ers	Motorists
RV (Net)	67%	1%
RV I own to drive to Texas	63%	0%
RV I own and leave in Texas	6%	0%
RV I rent to drive to Texas	4%	0%
RV I rent once I get to Texas	1%	0%
Stay with a friend or relative	17%	50%
Hotel/motel in Texas	17%	49%
House (Net)	13%	23%
House I own in Texas	13%	19%
House I rent in Texas	1%	5%
Apartment/condo (Net)	11%	23%
Apartment/condo I rent in Texas	10%	19%
Apartment/condo I own in Texas	1%	4%
Mobile home (Net)	6%	2%
A mobile home I own in Texas	5%	1%
A mobile home I rent in Texas	1%	1%
Tent camping	0%	1%
Other	4%	8%
Own Property (Net)	80%	25%
Mean # of Residences in Texas	1.44	1.58
N=	(150)	(250)

(N = 400)



Findings
Getting To & From Texas



Areas Stop En Route To Texas

- Outside of Texas, Oklahoma is far and away the most likely state for non-Texans to stop en route to their Winter Texan residence.
 - Half stop in Oklahoma. One in five stop in Oklahoma City on the way to their Winter Texan Residence.

% Saying They Stop At Area En Route To Texas

	Non-Texans
Texas (Net)	62%
Dallas/Ft. Worth area	33%
Someplace else in TX (besides our final destination)	38%
Oklahoma (Net)	49%
Oklahoma City	20%
Tulsa	8%
Someplace else in Oklahoma	25%
Missouri (Net)	35%
St. Louis	10%
Kansas City, MO	8%
Springfield, MO	7%
Someplace else in Missouri	15%
Kansas (Net)	27%
Wichita	11%
Kansas City, KS	7%
Topeka	3%
Someplace else in Kansas	9%

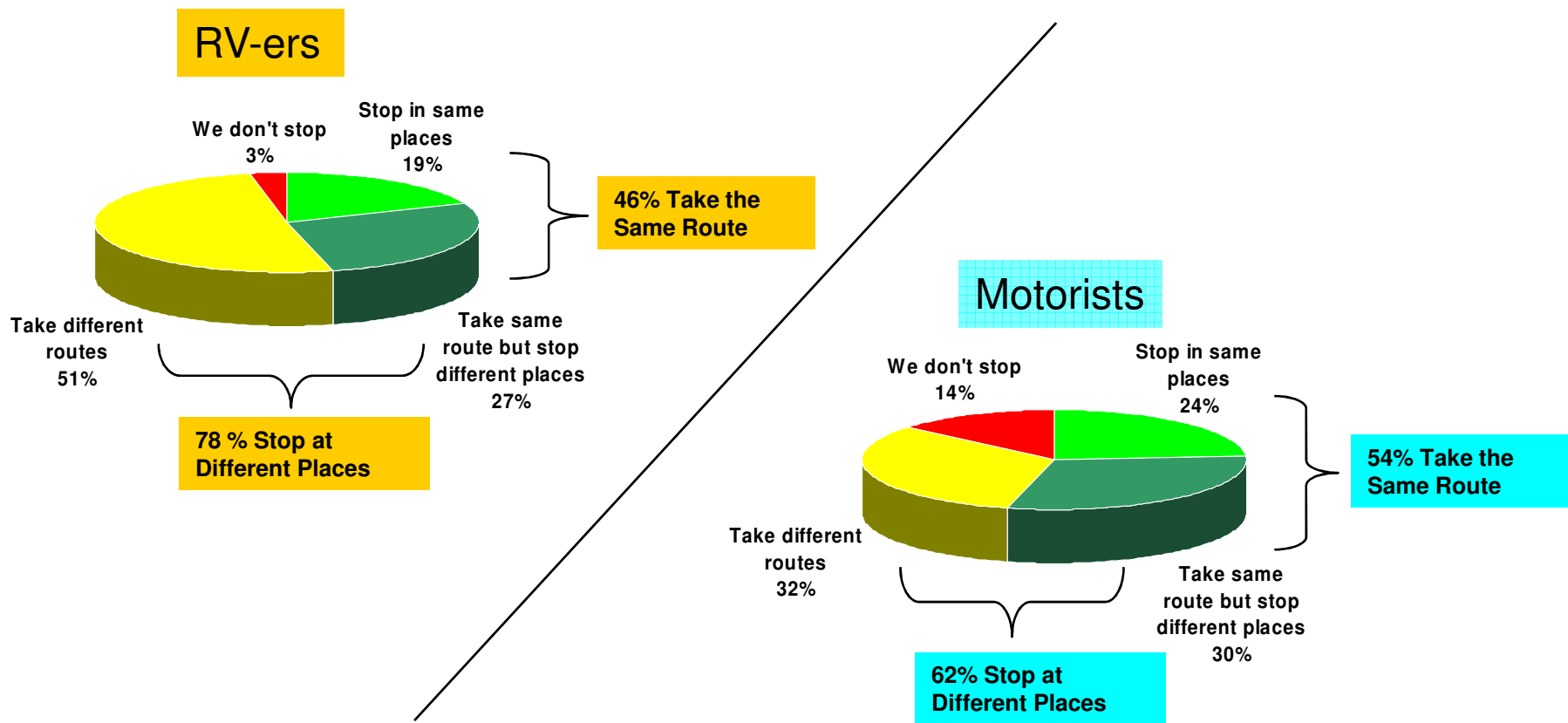
	Non-Texans
Iowa (Net)	18%
Des Moines	9%
Someplace else in Iowa	10%
Arkansas (Net)	17%
Little Rock	7%
Someplace else in Arkansas	12%
Tennessee (Net)	12%
Memphis	6%
Someplace else in TN	7%
Nebraska (Net)	7%
Omaha or Lincoln NE	5%
Someplace else in NE	4%
Mean # of stops*	2.6
We drive straight through	21%
	N= (328)

* Mean based to those who made 1+ stop en route to Texas.

(N of Non-Texans = 328)

Route When Coming vs. Going

- RV Owners are significantly more likely than Motorists to stop in different places when leaving from Texas than they did when traveling to the state.
 - Both RV-ers and Motorists stop along the way, but RV-ers are more likely to do so.



(N = 400)

Months of Travel

- Two-thirds (66%) of Winter Texans arrive between November and January.
- Departures are more concentrated and perhaps more conveniently suited to a Rally: Nearly as many (58%) depart in March or April.
 - While RV-ers and Motorists travel in similar months, RV-ers tend to stay until March or April, whereas Motorists most often leave in February.
 - Those who consider themselves Winter Texans are also more likely to leave Texas in March or April.

	RV-ers		Consider Self Winter Texan*	
	Go To Winter Residence	Return From Winter Residence	Go To Winter Residence	Return From Winter Residence
October	9%		9%	
November	20%		17%	
December	19%	5%	33%	2%
January	27%	11%	31%	13%
February	15%	13%	9%	18%
March	3%	31%	1%	39%
April		27%		23%
May		8%		5%
between April - September	7%		1%	
between June - November		5%		1%
N=	(150)		(144)	

* Among non-Texans only.

Length of Road Trip

- The vast majority of Winter Texans are on the road less than a week, regardless of whether they are going to or from Texas.
 - However, RV-ers are far more likely than Motorists to be on the road for several weeks before or after they stay at their Winter Texan residence.

	RV-ers		Consider Self Winter Texan*	
	Go To Winter Residence	Return From Winter Residence	Go To Winter Residence	Return From Winter Residence
A few days or less than a week	74%	71%	86%	81%
More than 1 week but less than 2 weeks	15%	16%	7%	12%
More than 2 weeks but less than 3 weeks	6%	7%	4%	4%
More than 3 weeks	5%	7%	3%	4%
	N=	(150)		(144)

* Among non-Texans only.



Transportation Mode to Get to Winter Residence

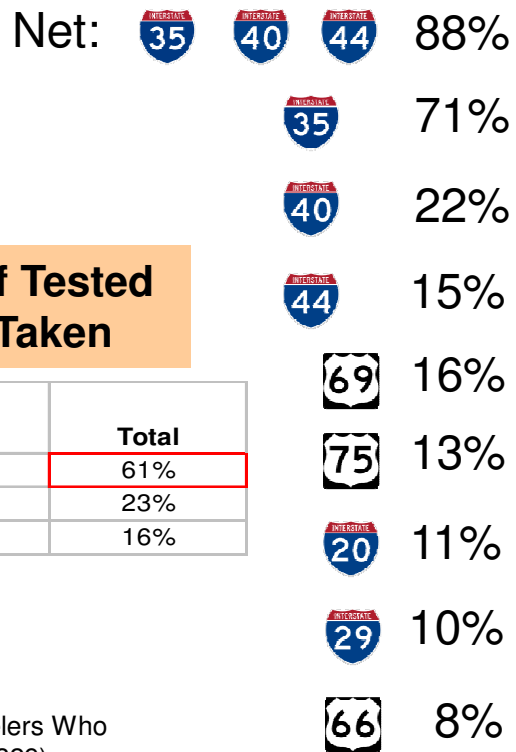
- **Not all RV owners who visit Texas for the winter go there by RV.**
 - **7 in 10 RV-ers drive or tow their RV to their Winter Texas residence.**
 - **Over half of RV-ers also drive or tow a car with them to Texas.**

	RV-ers
Drive (Net)	97%
Drive a car/van/SUV/motorcycle	27%
Drive or tow RV (Subnet)	70%
Drive RV (Sub-subnet)	49%
Drive an RV motorhome or truck camper (while towing a car)	35%
Drive an RV motorhome or truck camper (without towing a car)	14%
Drive a car but haul a towable RV (camper or 5th wheel trailer, pop-up trailer, travel trailer)	21%
Airplane	3%
	N= (150)

Routes Taken

- I-35 is by far the most common route Winter Texans take to and from their Winter residence, accounting for almost three-fourths of traffic.

% Taking Each Route*



Number of Tested Routes Taken

	Total
Take one route	61%
Take two routes	23%
Take three or more routes	16%



(N of Non-Airplane Travelers Who Identified Route Taken= 329)

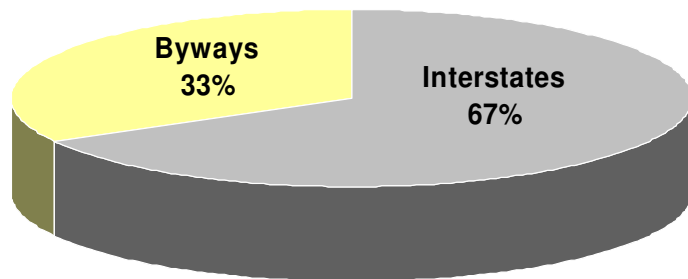
* Average of To and From Winter Destination

Use of Interstate Vs. Scenic Byways

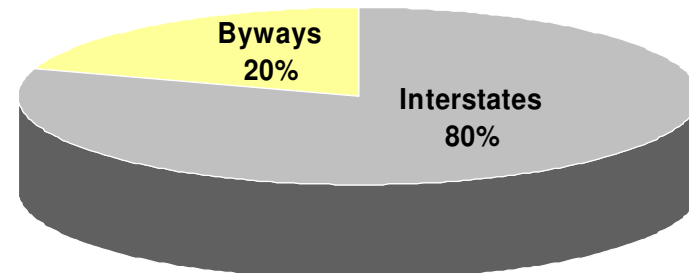
- The vast majority of driving time is spent on Interstates.
 - RV-ers travel significantly more miles than Motorists on scenic byways.

% Of Miles Spent By Road Type On Trip To Texas

RV-ers



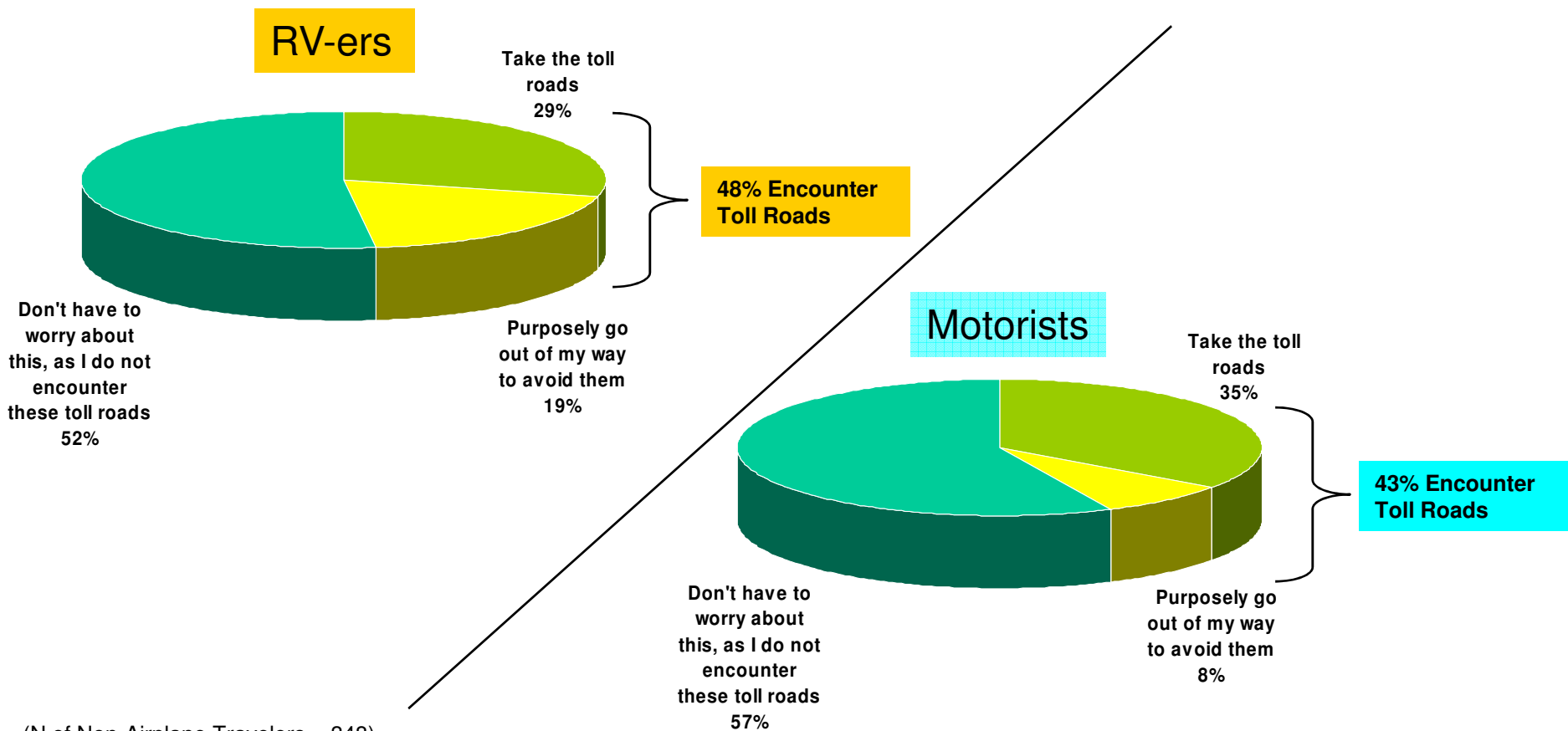
Motorists



(N of Non-Airplane Travelers = 348)

Toll Road Habits in Oklahoma

- Almost half encounter toll roads. Of these, a clear majority take them.
 - Not surprisingly, RV-ers are significantly more likely than Motorists to purposely go out of their way to avoid toll roads. However, even RV-ers usually take toll roads.



(N of Non-Airplane Travelers = 348)

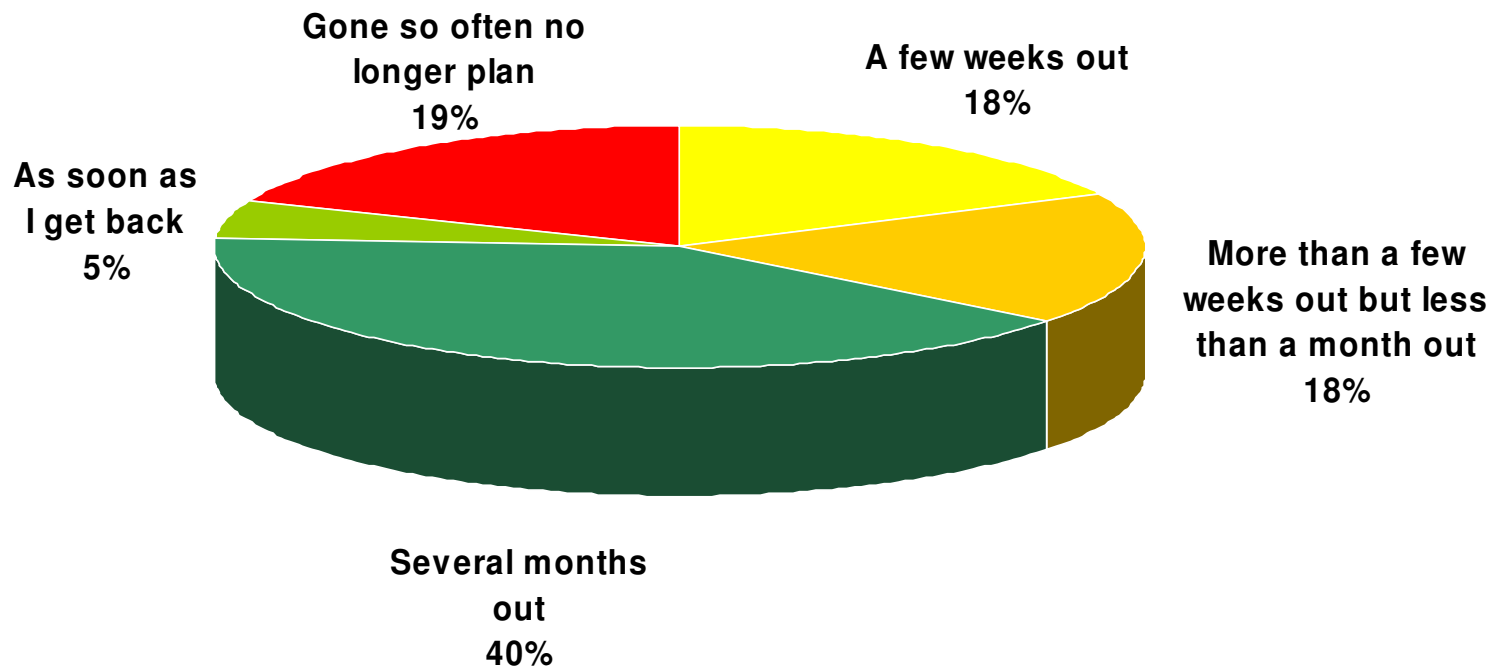
Findings

Reaching Winter Texans

Planning The Trip

- Nearly half of Winter Texans plan their next trip to Texas at least a few months out.
 - Many others plan a few weeks to a month in advance.

How Far In Advance Plan Trip



(N = 400)

Sources of Information

- For all Winter Texans, websites are popular sources of information; however, RV-ers are particularly fond of using guides and magazines to plan their trips.
- RV-ers also often use RV-oriented websites.

Information Sources Used To Plan Trip

	RV-ers	Motorists
Website/Internet (Net)	75%	73%
Website/Internet for information about places in Texas	52%	57%
Website/Internet for information about locations along the way	39%	42%
Website/Internet for RV information	47%	2%
Other Internet sites	1%	4%
Good Sam Club	2%	0%
Guides/Magazines/Maps (Net)	68%	45%
Guides (Subnet)	61%	44%
AAA guides or other AAA information	34%	34%
Tour and travel guides from individual states	26%	18%
Woodall's	19%	0%
Tour and travel guides such as Mobil guides	5%	6%
Magazine (Subnet)	25%	1%
Trailer Life	19%	0%
Motor Home Magazine	12%	0%
Other guides/magazines/maps	1%	2%
Friends/Family	3%	2%
GPS	1%	2%
Other	2%	4%
Rely on personal experience or knowledge/No outside sources	7%	10%
	N= (150)	(250)

Roles & Responsibilities

- Men are typically responsible for the route planning and driving while women are typically responsible for planning the activities.
 - RV-ers are more likely than Motorists to be members of at least one travel club/association.

Person In Household Responsible For....








Responsibility	Men (%)	Women (%)
Planning the route of the trip	70%	30%
Planning the activities on the trip	34%	66%
Doing most of the driving	86%	14%

Planning The Trip

- **AARP is the most popular member association, followed by AAA and (for RV-ers) Good Sam Club.**
 - **RV-ers are more likely than Motorists to be members of a travel clubs/associations, but both typically belong to one.**

Travel Club/Association Membership

		 <small>www.goodsamclub.com</small>				None
RV-ers (N = 150)	64%	44%	41%	25%	4%	16%
Motorists (N = 250)	57%	0%	43%	0%	0%	27%

Frequency of Accessing Internet

- Two-thirds of RV-ers have Internet access on the way to Texas.
 - Almost all of these use the Internet every day or two.
- Motorists have slightly less Internet access but even of these travelers use it regularly en route.
- Not surprisingly, 9 out of 10 Winter Texans have Internet access while at their Winter residence.

En Route To Texas (Among Non-Airplane Travelers)

	RV-ers	Motorists
Have Internet Access	68%	55%
At least every few days (Net)	64%	51%
Daily	43%	39%
Once every couple of days or so	22%	12%
Once a week	1%	2%
Once every two weeks	0%	0%
Less than once every two weeks	1%	2%
Do not have Internet Access	32%	45%
	N= (145)	(203)

While At Winter Texas Residence

	Total [†]
Have Internet Access	90%
At least every few days (Net)	86%
Daily	71%
Once every couple of days or so	15%
Once a week	4%
Once every two weeks	0%
Less than once every two weeks	1%
Do not have Internet Access	10%
	N= (400)

* RV-ers and Motorists are similar once at their Winter residence.

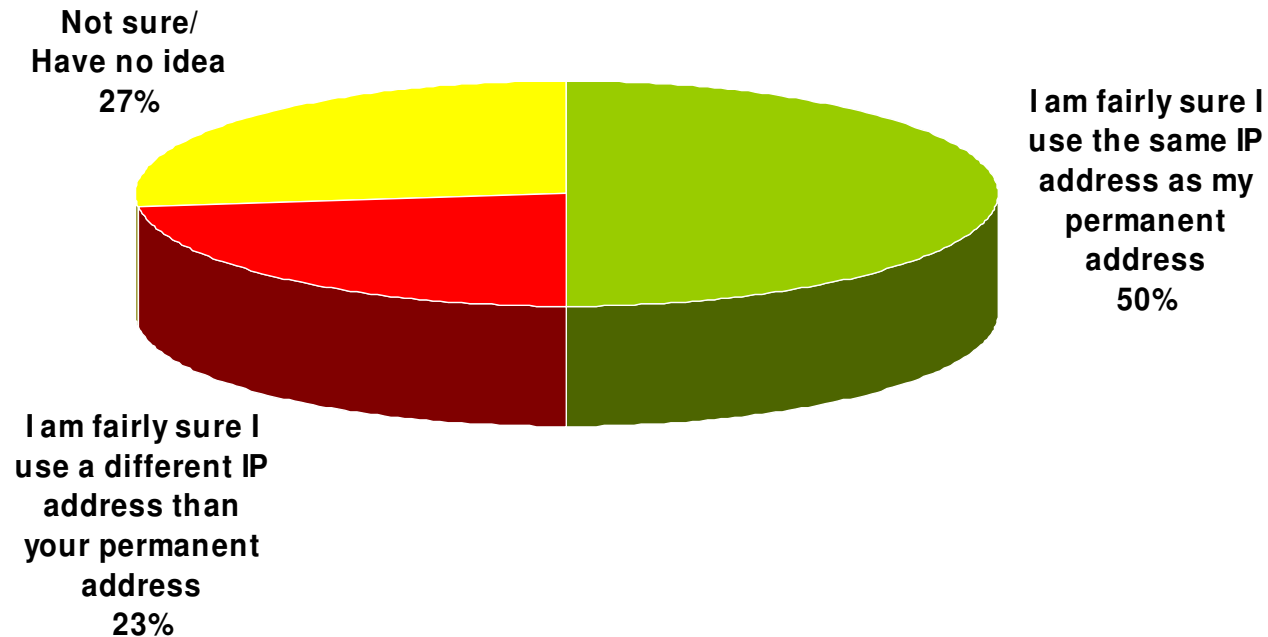
Type of Regular Internet Access

- **Both RV-ers and Motorists (who regularly access the Internet en route to Texas) widely use WiFi for access.**
 - **A substantial minority use a wireless smartphone.**
 - **Very few use satellite, even among RV-ers.**

	RV-ers	Motorists
Wireless Internet Access (WiFi) using computer while stopped at RV parks, rest stops, hotel/motel, etc.	84%	84%
Wireless Phone Access (3G, EDGE, etc.) from a Blackberry or iPhone-type mobile device	25%	33%
Satellite Internet from an RV	7%	1%
N of Non-airplane travelers who access Internet at least every couple of days =	(95)	(103)

IP Address Used While In Texas

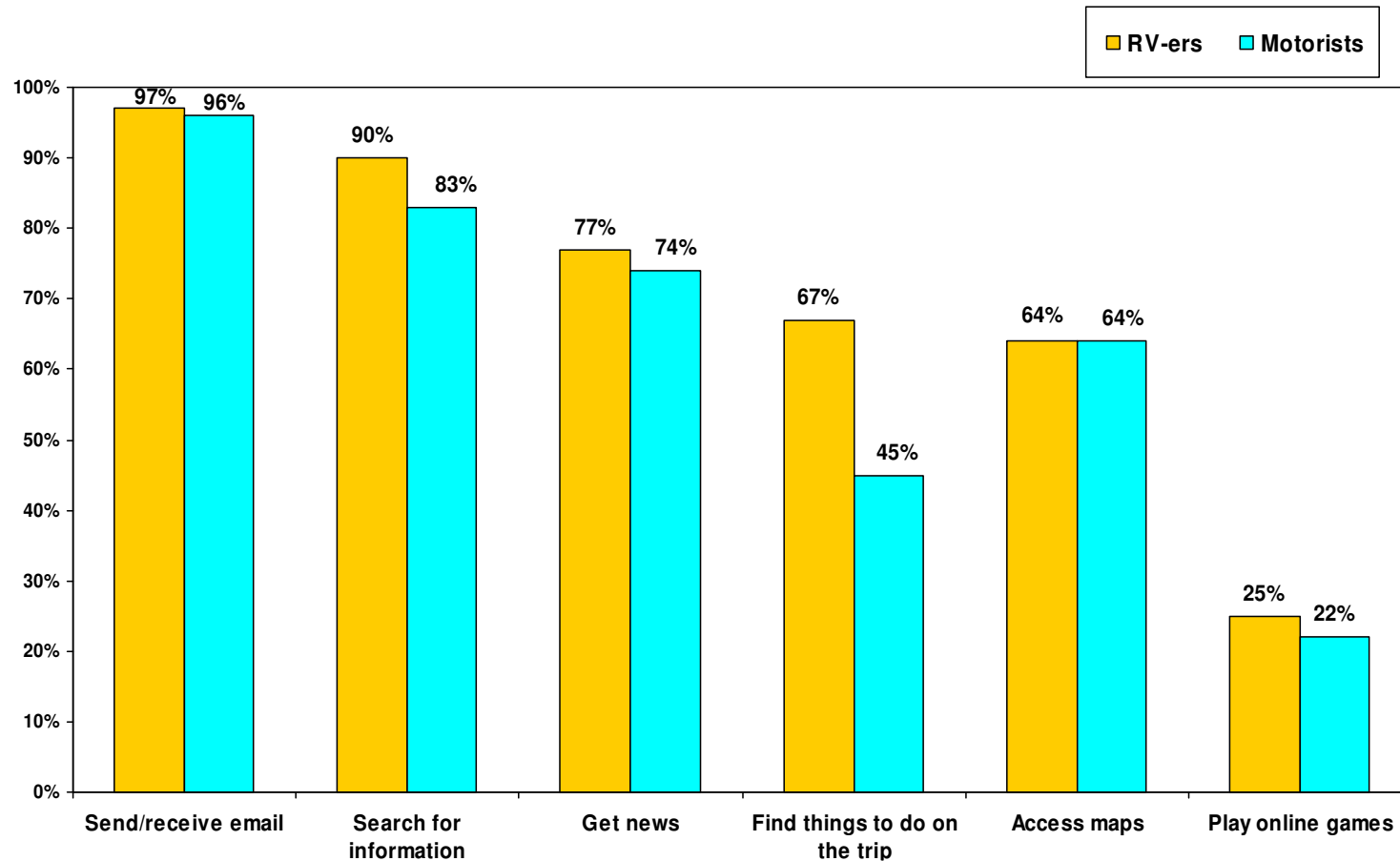
- **Half of Winter Texans believe they use the same IP address at their Winter residence as they do at their permanent address.**
 - **But many are unsure**



(N of those who have Internet access at final destination in Texas= 361)

Activities Regularly Use Internet For

- The most popular online activities are e-mail, information searching, and news.
- While RV-ers and Motorists generally use the Internet for similar activities, RV-ers are far more likely to browse the web to find things to do on a trip.



(N of those who have Internet access at final destination in Texas= 361)



Media Usage

- Radio and print are both promising ways of reaching Winter Texans.
- 4 in 5 listen to regular radio. Similar to Internet access, satellite is not a primary radio option.
- Local newspapers, followed by AARP Magazine, and reading their hometown newspaper online are Winter Texans' primary print media.
 - RV-ers and those who consider themselves Winter Texans are far more likely than their counterparts to read AARP Magazine and the Winter Texan Times.
 - Winter Texan Times readership is heavily composed of RV-ers.

	Total	Type of Traveler		Consider Self Winter Texan*	
		RV-ers	Motorist	Yes	No
Radio (Net)	88%	86%	89%	90%	86%
Listen to regular radio on the road	79%	75%	81%	81%	77%
Listen to satellite radio while on the road	21%	24%	19%	22%	21%
Print (Net)	81%	85%	79%	84%	80%
Read the local paper while in Texas	60%	55%	63%	68%	55%
Read AARP The Magazine	39%	46%	34%	42%	33%
Read my local newspaper (permanent address paper) online	33%	35%	32%	38%	30%
Subscribe to the newspaper at my permanent address	29%	27%	31%	28%	28%
Read RV publications such as Woodall's, MotorHome or Trailer Life	15%	37%	1%	18%	10%
Read the Winter Texan Times	12%	23%	6%	24%	3%
Use the Internet while traveling	31%	37%	28%	33%	28%
None/No Answer	2%	1%	2%	1%	1%
	N= (400)	(150)	(250)	(144)	(184)

* Among non-Texans only.



Radio Stations Listen To

- **Oldies, Country, News/Talk, and Classic Rock are the preferred radio station genres among Winter Texans.**
 - **Oldies are the most popular.**
 - **News/Talk is next.**

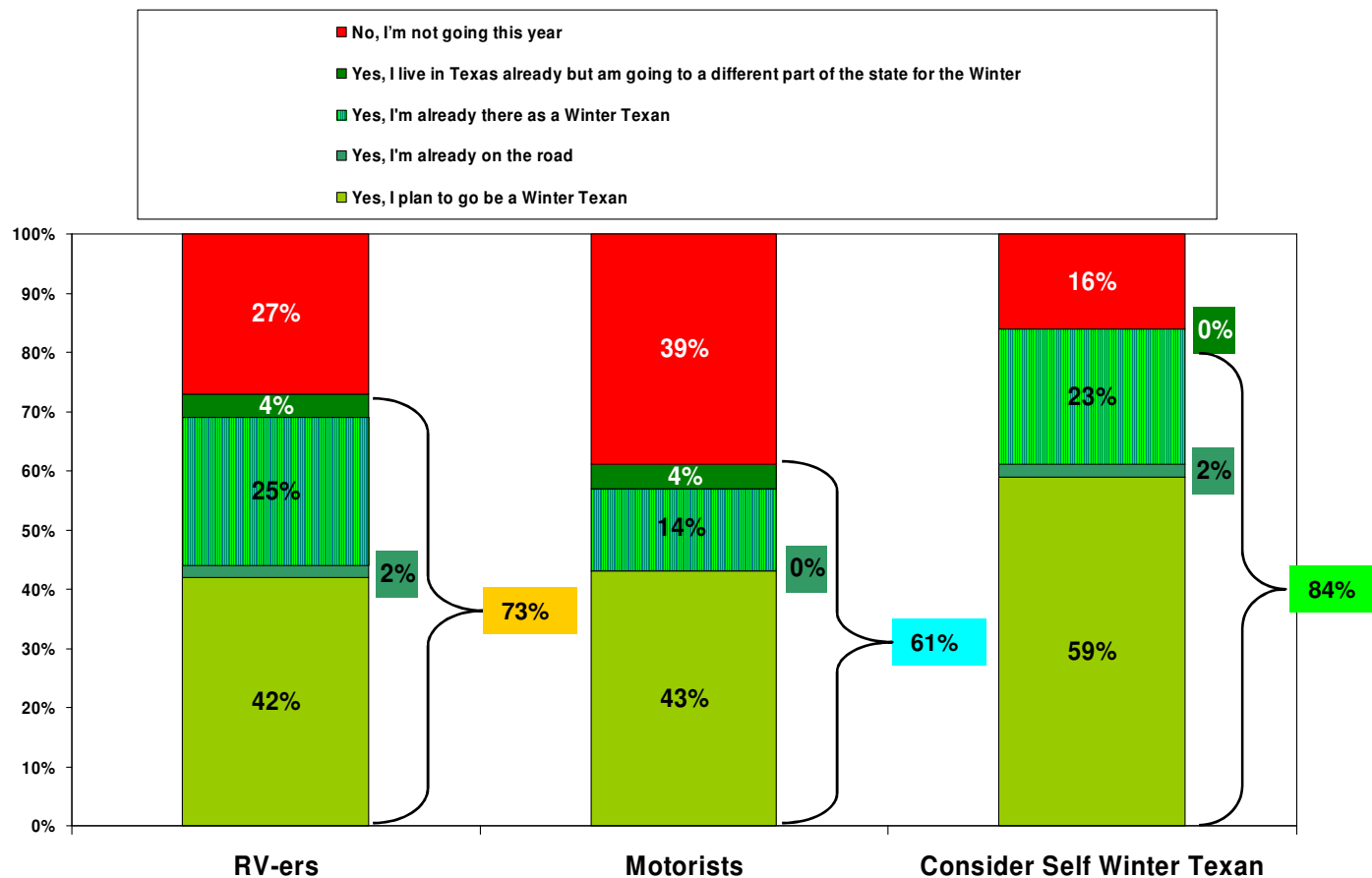
	Radio Stations Listen To	
	Most Often	Regularly
Oldies	21%	55%
Country	16%	40%
News/Talk	15%	53%
Classic Rock	14%	37%
NPR	9%	24%
Religious	5%	10%
Classical	3%	17%
Adult Contemporary	2%	16%
Rock (current)	2%	10%
Jazz	1%	14%
Sports	1%	18%
Spanish and Latin	0%	1%
Do not listen to radio	12%	12%
N=	(400)	



Findings
Travel Plans This Year

Plans For This Year

- Suggesting they regularly go to Texas in the winter, 2 in 3 say they will go this year.
- RV-ers are more likely than Motorists to plan on being a Winter Texan this year.
 - In addition, those who view themselves as Winter Texans are overwhelmingly likely to return to Texas this year.



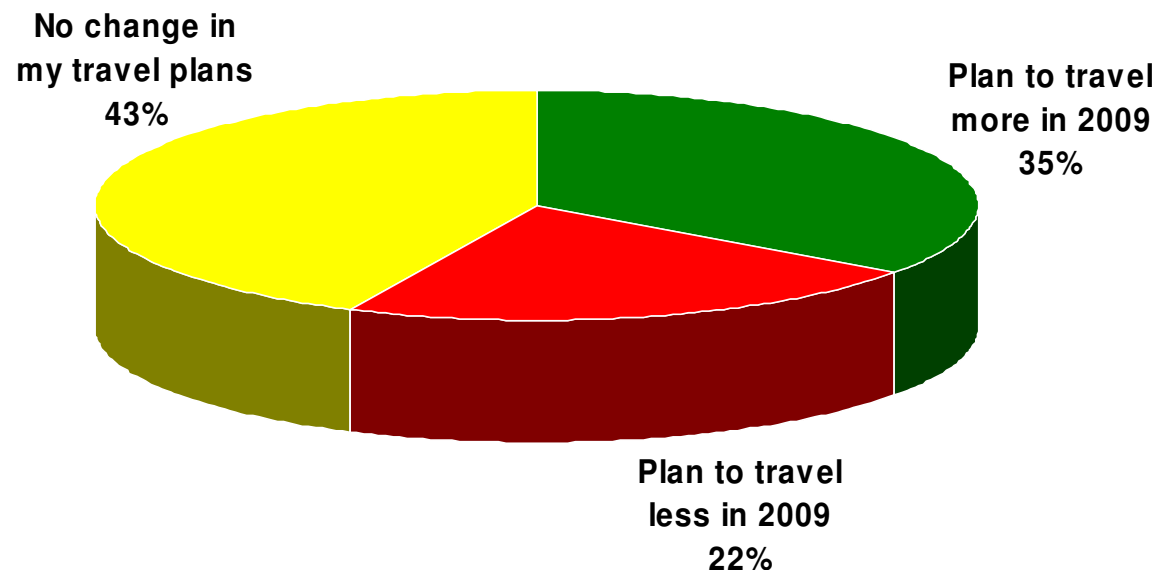
Reasons For Not Going This Year

- The economy is playing a role in limiting the Winter Texan phenomenon, but it is not the major factor.
 - When the one-third of Winter Texans who do not plan to go this year are asked why they are not returning to Texas this year, just a quarter cite the economy.
 - By contrast, the two most cited reasons for not returning to Texas are competitive vacation spots and never planning to go this year.

	Winter Texans Not Planning To Go To Texas This Year
Other places I'd rather go this year	37%
Never planned to go this year	27%
Economy-related (Net)	25%
I'm not going because of the economy in general	17%
Decrease in my income	9%
I decided not to go when gas was so high	8%
Increased costs in Texas last season	2%
Family reasons	15%
Not planning a vacation this year	11%
My/spouses' health/medical reasons	9%
Increased costs in Texas last season	2%
Didn't like it last year	2%
I/ my spouse is getting too old	1%
N Not Planning To Go To Texas This Year =	(138)

Trend of Travel Plans In 2009

- **People are still hitting the road!**
 - **Despite a slumping economy, significantly more Winter Texans are planning to travel more vs. travel less.**
 - **This reinforces the notion that the economy is not the primary factor in limiting travel to Texas.**



(N = 400)

Findings

Interest In Winter Texan Rally

Interest In A Winter Texan Rally - Concept

Whether you are planning to go to Texas this year or not, we'd like your reaction to a concept statement.

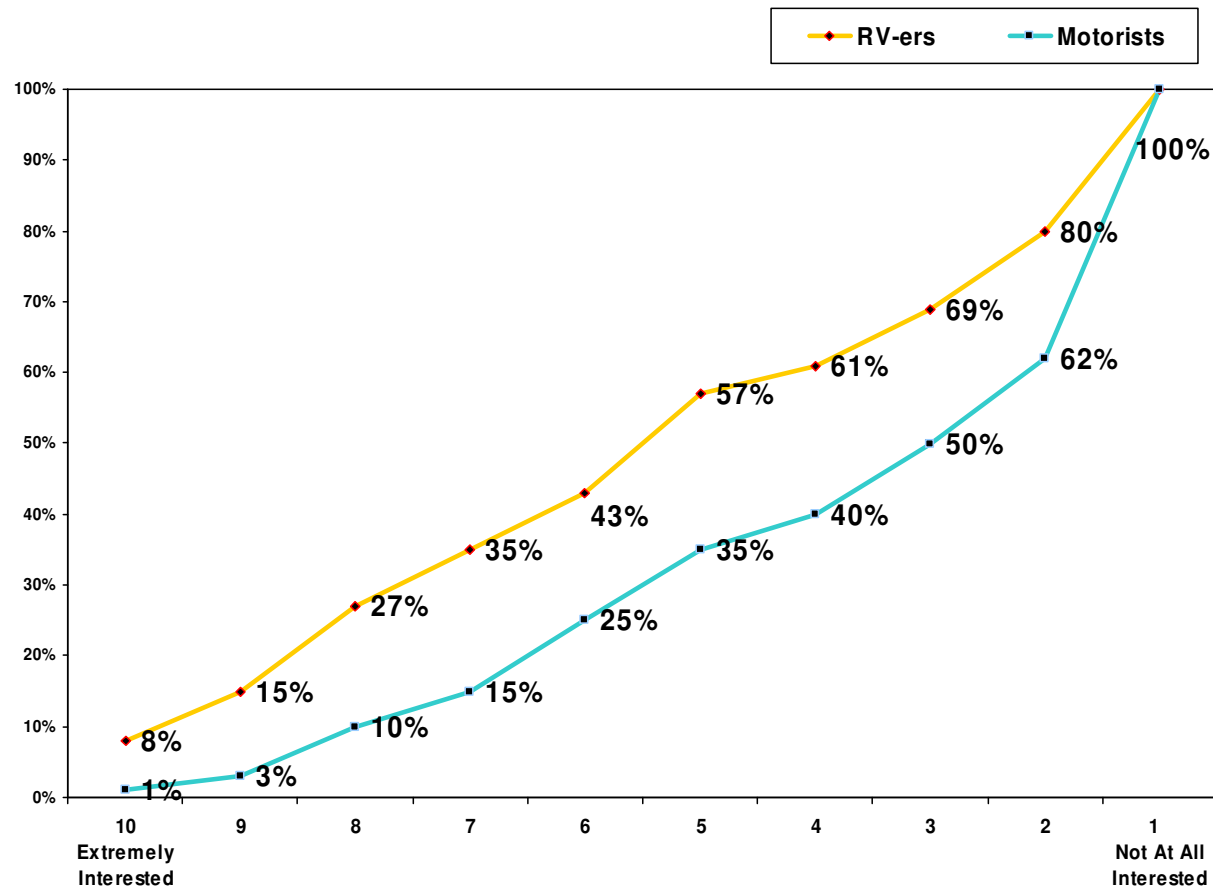
Oklahoma introduces the first ever WINTER TEXAN RALLY.

This proposed annual event would be held at the Oklahoma State Fair Park, which is easily accessible from I-44, I-35 or I-40. This three-day long WINTER TEXAN RALLY would feature:

- Hundreds of dealers, RV manufacturers and suppliers showing their latest equipment, technology and gadgets
- RV Safety and Education Foundation would weigh RVs
- Health screening (blood pressure and more)
- Dozens of seminars daily on everything from healthy eating on the road, to troubleshooting techniques, to cancer and other health information
- Silver Sneakers, Yoga, Pilates and other exercise classes designed for you on the road
- Optional tours to the Oklahoma City National Memorial and Museum, National Cowboy and Western Heritage Museum, Oklahoma City Museum of Art, BrickTown, RiverWind Casino, Remington Park, Firelake Casino, the Oklahoma City Zoo, Myriad Botanical Gardens and more
- Entertainment from a major performer such as Tom Jones or Tony Bennett
- Youth activities
- And more...

Interest In Winter Texan Rally

- Prior to learning costs, interest in a Winter Texan Rally is moderate but sufficient to create a successful event.
 - Among RV-ers who go to Texas in the winter, 1 in 4 rate their interest “8” “9” or “10” on a 10-point scale.
 - RV-ers are significantly more interested than Motorists in attending the Winter Texan Rally.

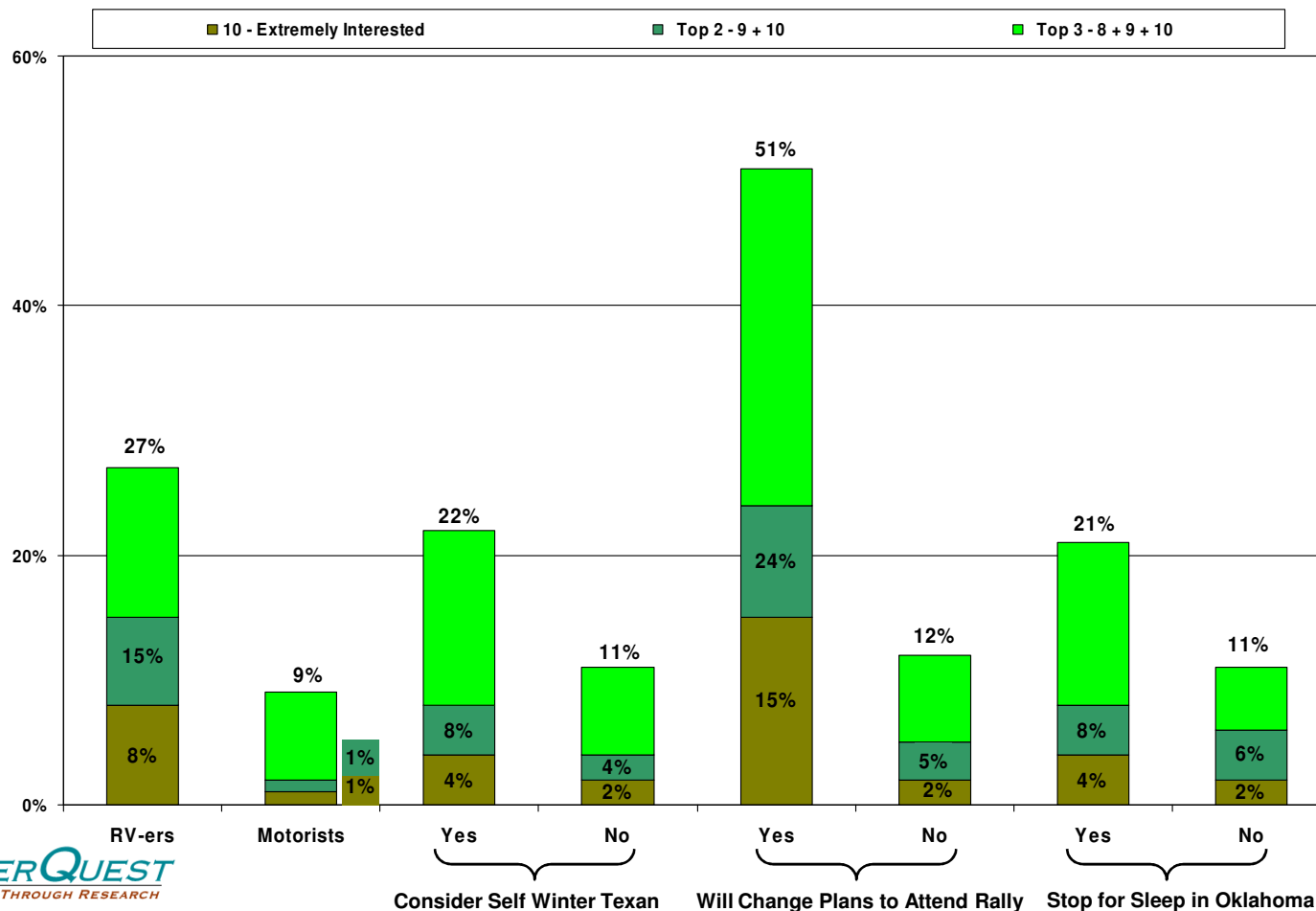


(N = 400)

Interest In Rally – By Segment

- Those who consider themselves Winter Texans, those who would change plans to attend the rally, and those who have stopped for sleep in Oklahoma are particularly likely to express Top 3 Box interest in the rally.

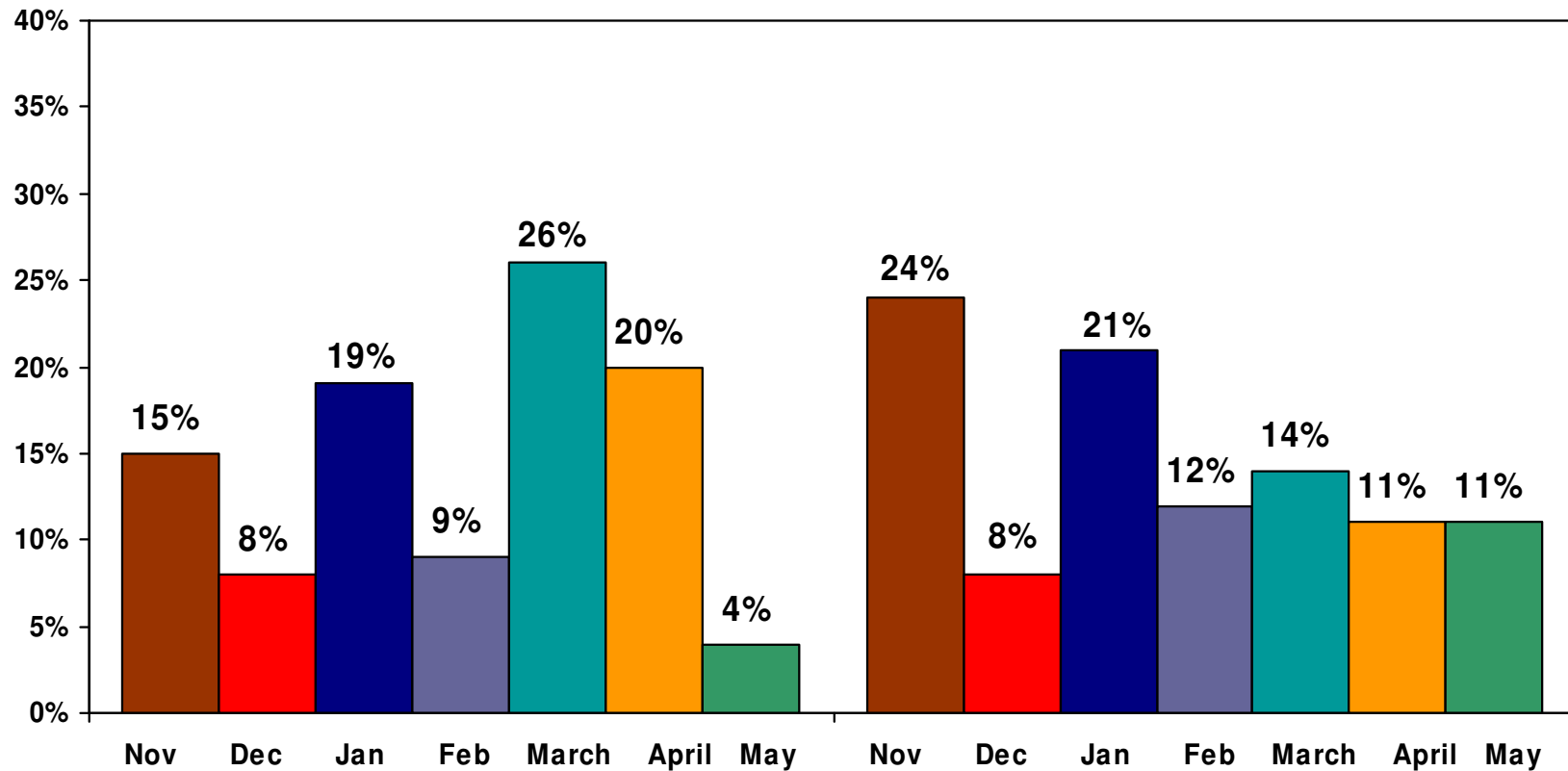
% Saying “8, 9, or 10” on a 10-point scale



(N = 400)

Best Time of Year To Hold Rally

- RV-ers most often cite March as the best month to hold the Winter Texan Rally, whereas Motorists lean towards November.



(N of Those Who Have Some Interest In The Rally = 171)

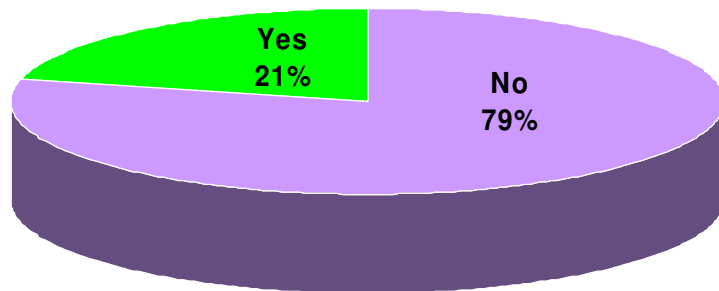
RV-ers
(N=86)

Motorists
(N=85)

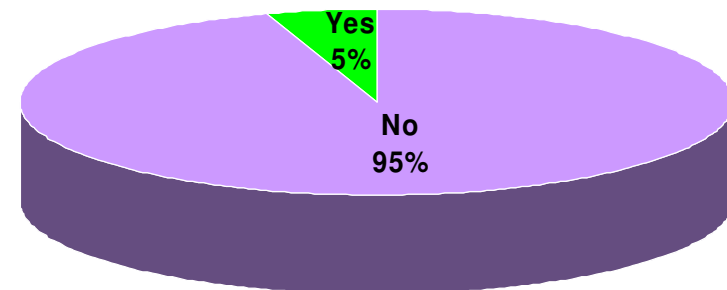
Been to Rally Like This Before

- Rallies like the Winter Texan Rally are quite popular. One in five RV-ers say they've been to such a rally before.
- Non-RV-ers also go and probably account for at least as many attendees.
 - 5% have been to such a rally.
 - Motorists are 1/4th as likely to have attended a rally but 9X more prevalent in the population.

RV-ers



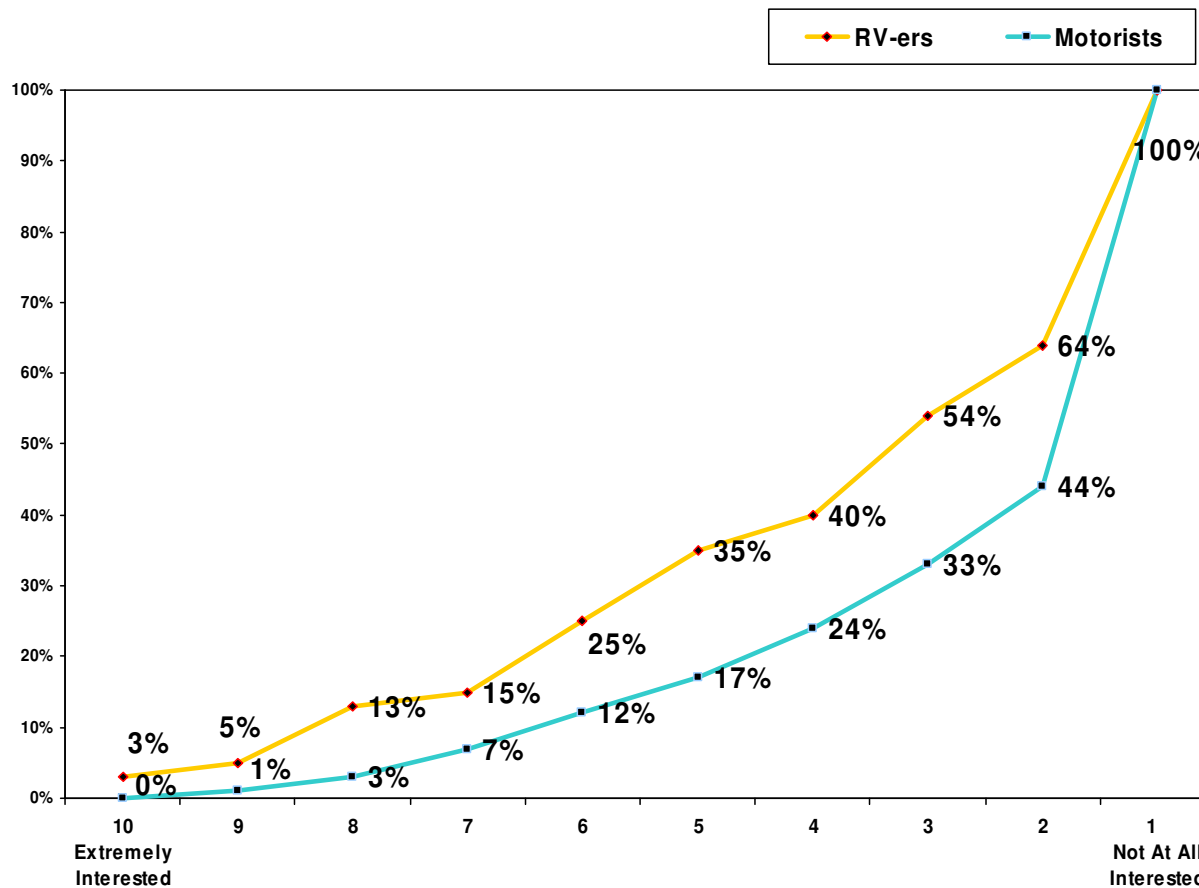
Motorists



(N = 400)

Impact of Cost on Interest

- When costs (ranging from \$75 to \$350) are brought up, interest declines by about half among both RV-ers and Motorists.
 - RV-ers remain much more interested across the board than Motorists.

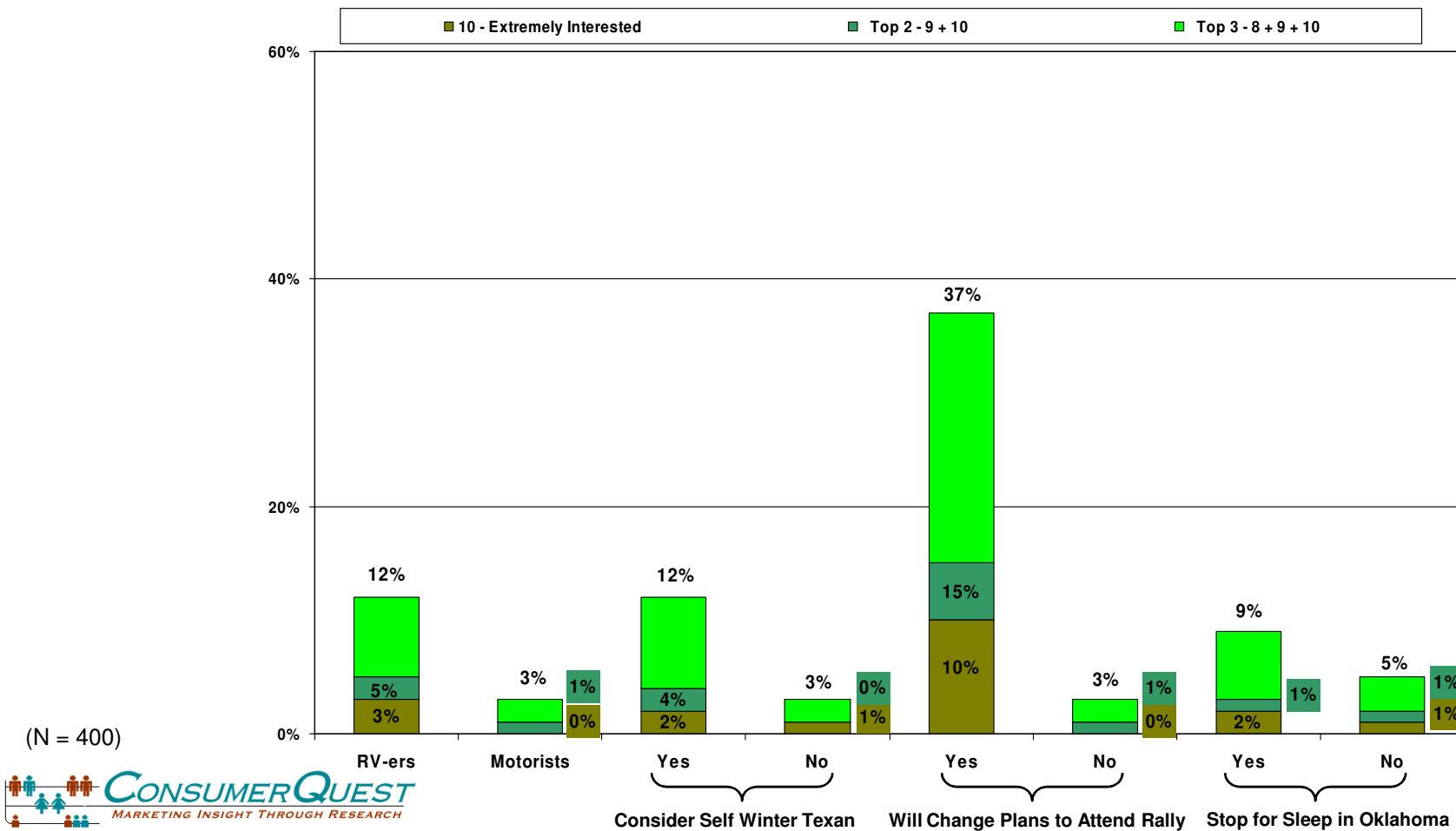


(N = 400)

Post-Cost Interest – By Segment

- Interest in the Rally declines similarly among all segments after exposure to costs.

% Saying “8, 9, or 10” on a 10-point scale



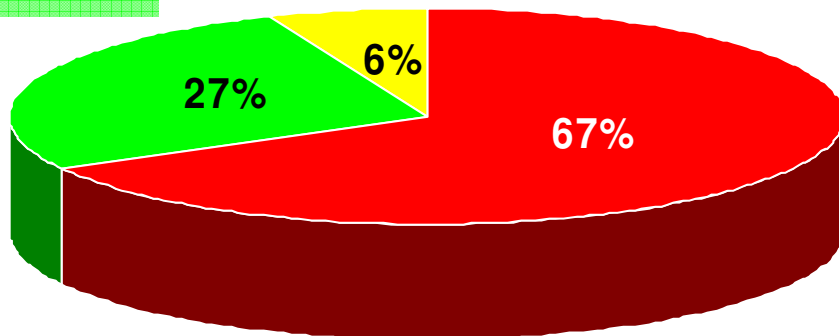
Potential Changing of Travel Plans To Attend Winter Texan Rally

- **Timing the event is crucial: most people will not arrange their plans around it.**
 - **Two-thirds of Winter Texans would not plan their travel around the Rally. A third say they would probably change their travel plans so they could attend the Winter Texan Rally.**

Among Those With Pre-Cost Interest Of “8, 9, Or 10” On A 10-point Scale

I'd probably change my travel plans so I would be driving through Oklahoma to catch the Winter Texan Rally.

I'd arrive in Texas at the same time I was planning, but I'd probably go back to Oklahoma this weekend of the Winter Texan Rally and attend it.



The only way I'd ever attend the rally is if I could stop at it on the way to Texas without having to change any other plans. I would not plan my travel around it.

(N of Those Who Have Top 3 Box Pre-Interest In The Rally = 63)

Putting It All Together: Estimating Attendance

Population of states subject of survey is 25.5 mm households

- 63% of households have a person age 45+ *

= 16 mm households

- 10% own an RV

= 1.6 mm RV owners (or RV-ers)

- 6% of RV-ers spend part of winter in TX

= 96,000 RV-ers spend part of winter in TX

- 13% post-price interest “8” “9” or “10” on 10-pt. scale

= 12,500 Interested RV-ers

- 40% discount for overstating interest

= 7,500 Interested RV-ers

- 51% can make time [26% depart in March + 25% (33% of remaining 76%) will rearrange/make special trip]

= 3820 Interested RV-ers will attend

- Assume 90% awareness

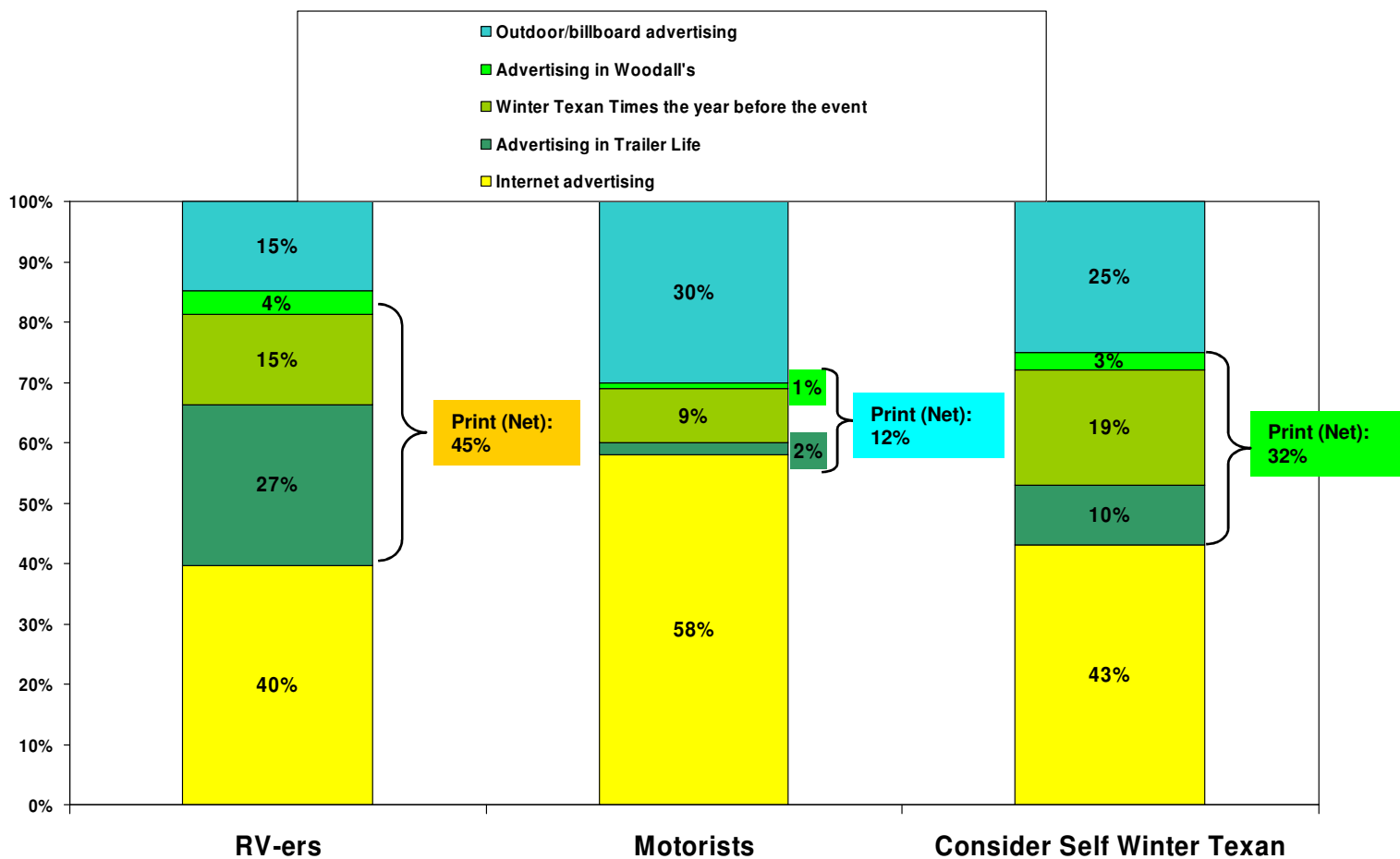
= 3430 projected RVs at this event from non-Texas states



* - extrapolated from US Census data.

Best Ways Be Reached About Rally

- Internet, advertising in “Trailer Life” and “Winter Texan Times” and outdoor/billboard advertising are particularly promising ways to reach RV-ers.





Would Stop In Oklahoma If.....

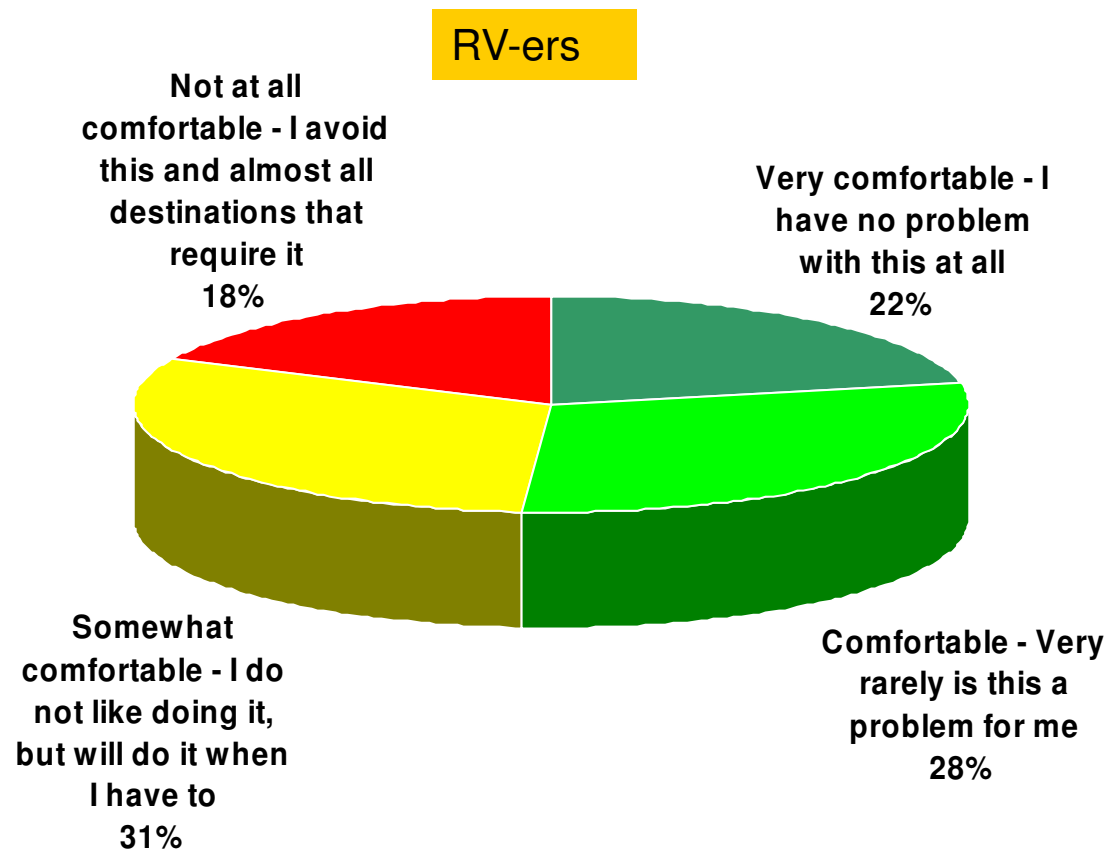
- Only a third of Non-Oklahomans have no interest in visiting Oklahoma.
- Instead, the vast majority point to a variety of appealing factors about Oklahoma (e.g., attractions, weather, shopping) that would influence them to spend time in the state.

Asked on an Open-Ended Basis

	Non-Texans/ Non-Oklahomans
Interesting sights/activities/attractions/sightseeing (general)	7%
Good/better/warmer weather	5%
To visit relatives/friends	5%
Already do sometimes travel/stop there	5%
Shopping (outlet stores, large-scale specialty stores, great sales, etc.)	4%
If it's convenient to stop (depends on where/when I'm going, how much time we have, etc.)	4%
Educational/historical attractions (museums, memorials, etc.)	3%
Conventions/shows/rallies (gun/hunting/fishing, RV/boat shows, arts & crafts shows, etc.)	3%
State/national parks/amenities (fishing, hunting, etc.)	3%
Nothing would convince me/just not interested	37%
N of Non-Texans/Non-Oklahomans =	(304)

Driving an RV on Commercial Streets

- 5 in 6 RV-ers will drive on commercial streets in a mid-sized city like OKC if needed.
- Half are fairly comfortable doing so.



(N of RV-ers = 150)

The background features a complex geometric design. A central horizontal band is divided into a brown left section and a teal right section. The teal section is further divided by a diagonal line that runs from the top right towards the bottom left. This diagonal line separates a solid teal area from a light blue area with a fine grid pattern. The top and bottom of the page are primarily light blue, with teal shapes extending from the diagonal line into these areas.

Conclusions & Implications



Conclusions & Implications

1. **If you live in Oklahoma and think you see lots of RV-ers and out-of-state motorists on the Interstate in the winter, you are not imagining things: A substantial number of RV owners and motorists are indeed passing through on the way to Texas.**
2. **Oklahoma has much to offer and most of these people can be influenced to stop.**
 - **Half already stop in Oklahoma and many more say that tourist attractions, weather, shopping, etc. could convince them to do so.**
3. **In targeting these people....**
 - **Think “Big 10 Country”; Snowbirds who also go to Florida and Arizona.**
 - **Keep in mind that many stay just a few weeks, even though once you are down there, you are more likely to run into those who stay for several months.**
 - **Most go year after year, and the economy is not stopping them this year.**
 - **If they go by RV, they are probably on their way to the Rio Grande Valley, South Padre, or Coastal Bend.**
 - **If they travel by car/van/SUV/truck, they could likely be staying in a major urban center (Dallas, Houston, or San Antonio).**



Conclusions & Implications

4. **Advertise in Texas to find the "Serious" Winter Texan.**
 - **By communicating with visitors after they've arrived in Texas, you are more likely to reach those who go more regularly and stay longer.**
5. **Media Sources:**
 - **Trailer Life and Winter Texan Times are promising print sources.**
 - **Advertise or do public info spots on Oldies and News/Talk radio stations.**
 - **Find them in their RV (that's where the bulk stay).**
 - **Find them online (they use WiFi almost everyday).**
 - **Use Good Sam's Club, AARP, AAA.**

Conclusions & Implications

6. Interest in a Winter Texan Rally is moderate but sufficient to create a successful event.
 - We estimate that about 3,400 RVs from outside Texas could attend this event.
7. Although motorists are less likely to go, there are so many of them that the Rally is likely to attract more motorists than RVs.
 - A population of 10,000 attendees is within reach.
8. March appears to be the optimal time to hold the event.
9. Oklahoma's toll roads are not a major obstacle, nor are commercial streets.
10. Many people plan far in advance - Make them aware of the event months in advance.
11. Many Texans vacation in a warmer part of the State during the Winter and they present a viable supplemental opportunity.



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