

# Go RVing

## **RV Perceptions and Purchase Motivators: A Communications Planning Study Executive Summary**



# Executive Summary

## Research Objectives

Consumer feedback was gathered in order to better understand consumer attitudes towards recreation vehicles and perceptions of the RV lifestyle. The overriding objective of this research was to help Go RVing refine their definition of the 'best RV buyer profile' and develop more effective marketing strategies to target owners and prospects.

## Methodology

This research was conducted via an online survey between February 3<sup>rd</sup> and March 10<sup>th</sup>, 2016 among 2,523 owners and prospects:

- 1,005 Owners
- 1,518 Prospects – 1,304 of whom would consider an RV purchase

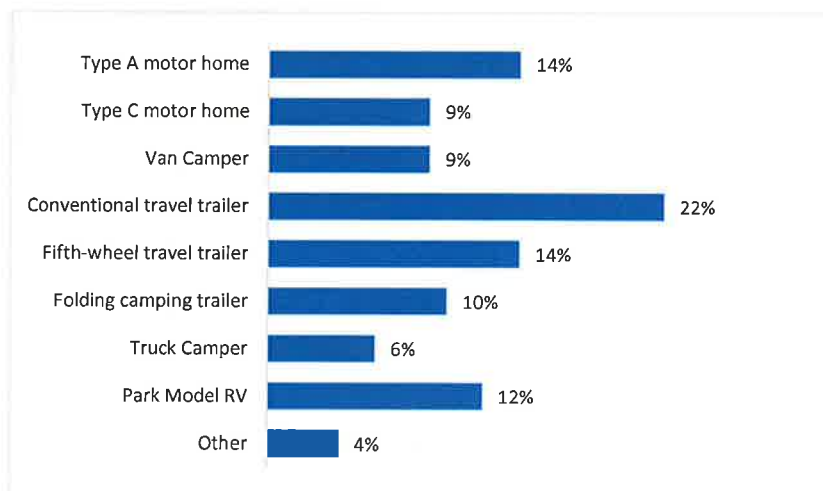
Respondents were all U.S. Residents, aged 18+. Non-owners were 18-70 and were additionally screened for a minimum Household Income of \$40K. All non-owners were also screened to ensure that they had taken at least 1 overnight trip in the past year. Data was weighted to be representative of the population of interest.

## Profile of RV Usage by Current Owners

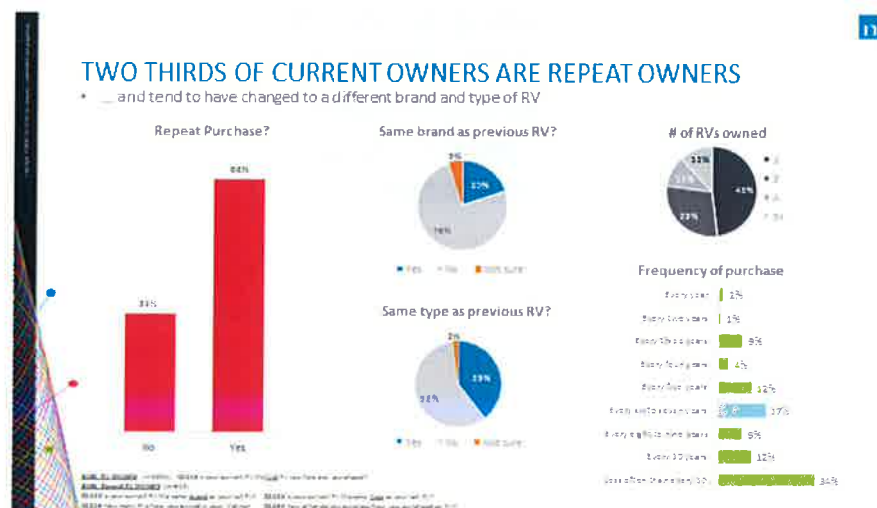
RV owners get a fair amount of usage out of their RV. They take an average of 5 trips per year in their RV, averaging 14 days and 3,000 miles. They typically use their RV for occasional camping trips, staying at a variety of destinations rather than just one. Three-fourths of owners say that they would use their RV more often if they had more time.

While owners say that the most important part of RV travel is having an opportunity to rest and relax while they enjoy nature, 75% of owners say that it is important for them to have internet connectivity while travelling by RV.

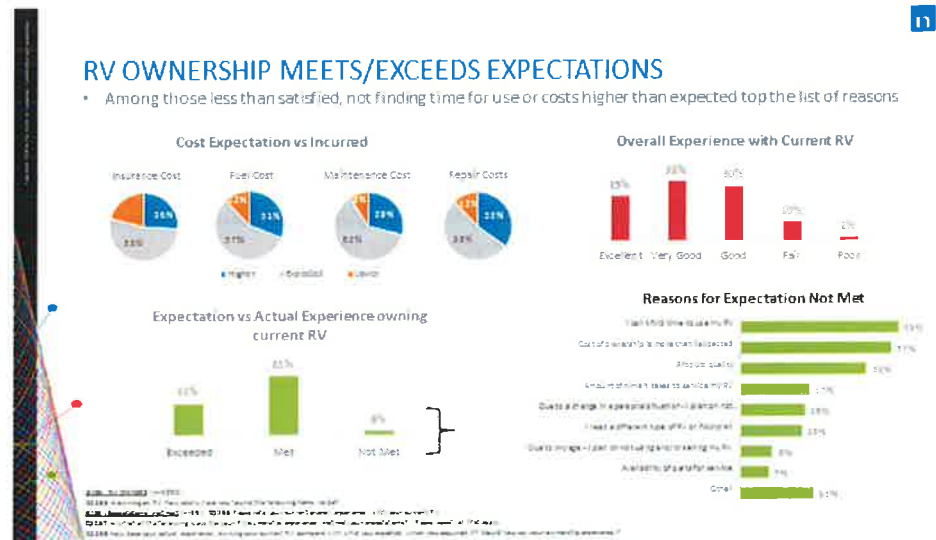
Conventional travel trailers are the most commonly owned type of RV among owners surveyed, however, ownership levels across other RV types are not far behind:



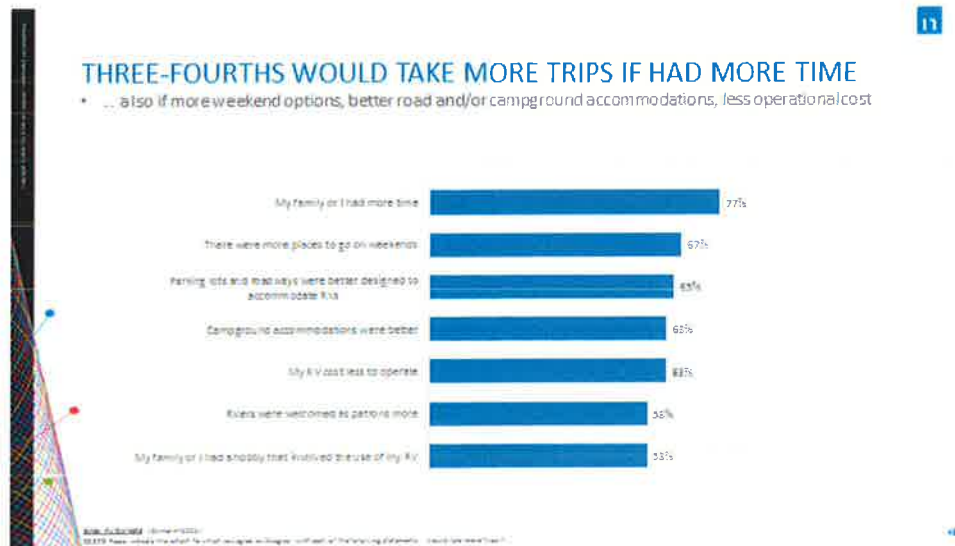
Two-thirds of current owners have previously owned an RV; they tend to purchase a different type and brand of RV for their second purchase. Roughly half of owners say that they purchased a used RV.



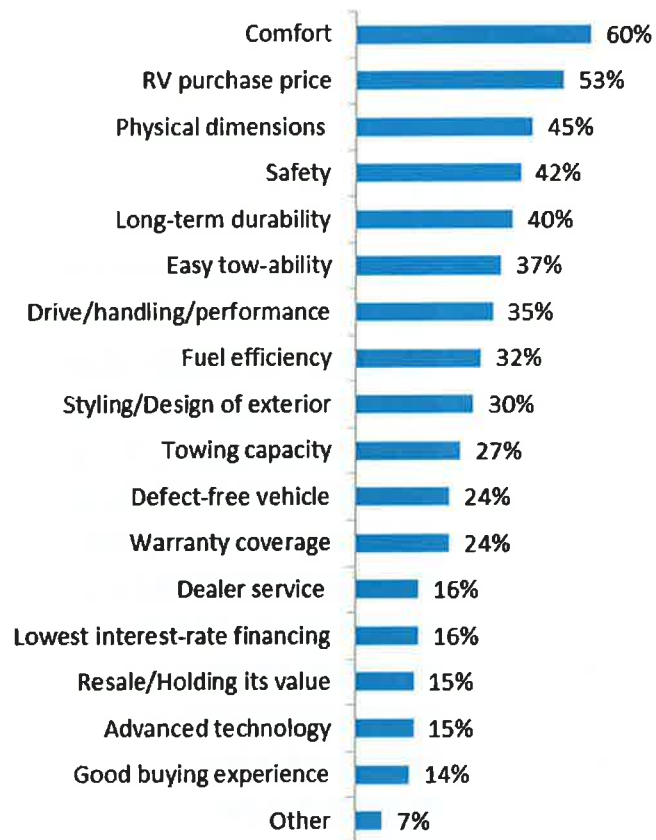
**Satisfaction is high among RV owners – the majority say that their expectations of RV ownership were either met or exceeded with 25% of current owners rating their overall experience excellent; 33% very good; and, 30% good.** However, for about one-third of owners, costs such as repair, fuel, and maintenance are higher than they expected.



Current owners want to do more RV travel and camping. Three-fourths indicated that they would take more trips if they had more time.



In terms of what RV owners look for when making an RV purchase, comfort and cost top the list of important factors:

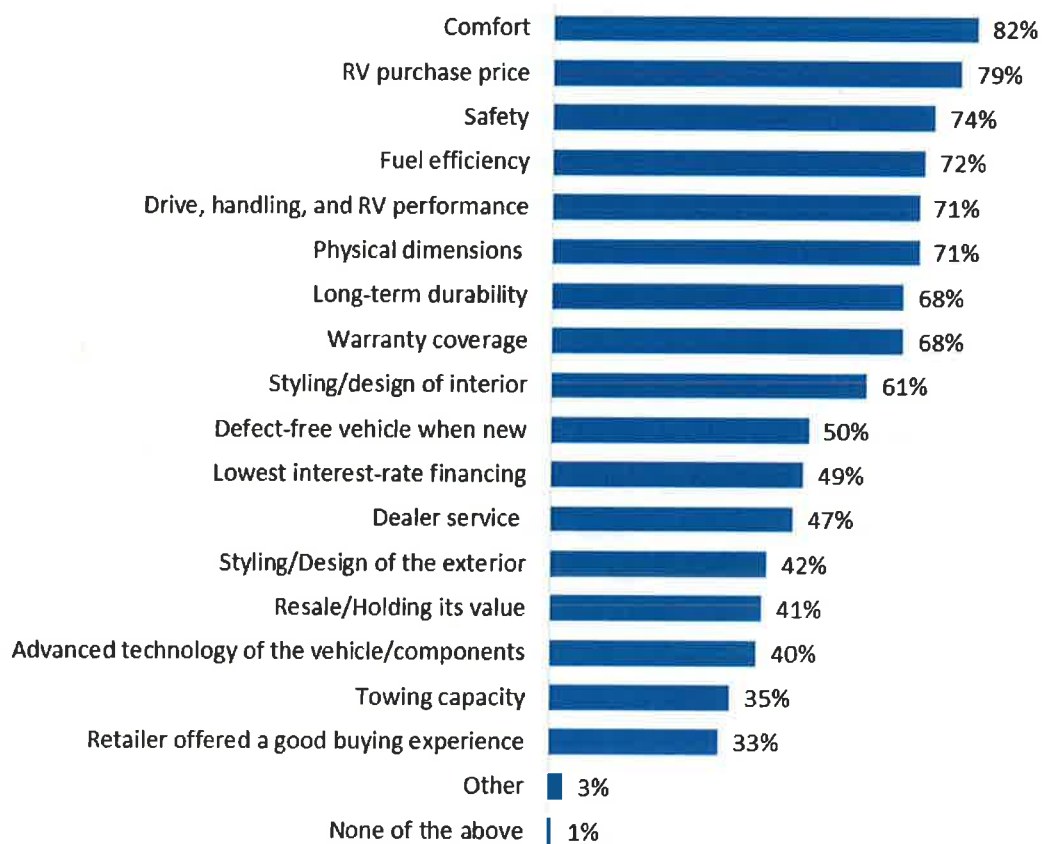


## Profile of RV Prospects

Among prospects surveyed, more than half have considered renting an RV. Further:

- 35% have looked into purchasing an RV
- 38% have visited an RV Showroom/Dealership
- 15% have previously rented an RV

Comfort, cost, and safety are the top factors considered by prospective RV purchasers:



The largest purchase barriers tend to be around costs (both the purchase cost as well as the ongoing maintenance costs). However, only 11% of those who have looked into purchasing an RV anticipate difficulty getting financing.

Those currently considering an RV purchase align closely with current owners in terms of their interest in camping and the RV lifestyle. Like owners, they believe that RVs offer the convenience of a home away from home, a unique freedom to travel when they want, and enable them to see more of the country.

## Segmentation of RV Prospects – The Best RV Buyer Profile

Top prospects were segmented based on their likelihood to purchase an RV and their positive affinity towards the RV lifestyle. This exercise resulted in five distinct segments of prospects, each offering various levels of opportunity. The segments with the highest potential are Active Family Adventurers, Nature Lovers, and Kid-Free Adult Adventurers.

### THE SEGMENTS REPRESENT 40% OF THE U.S. POPULATION

Active Family Adventurers	Nature Lovers	Kid-Free Adult Adventurers
<ul style="list-style-type: none"> <li>Highest opportunity segment</li> <li>Most likely to consider purchase, to have rented or owned an RV in the past, visited an RV dealership, read RV/Travel publications</li> <li>Most likely to have rented a camper/trailer or cabin in past 2 years</li> <li>Children have a lot of influence on leisure trip decisions</li> <li>Most active of the segments</li> <li>2<sup>nd</sup> most affluent segment</li> <li>Highest percentage of Gen X &amp; African Americans</li> </ul> <p>Mean Age: 44.3 73% Married, 56% with Kids Roughly Equal Male/Female</p>	<ul style="list-style-type: none"> <li>Most likely to consider RV ownership or rental</li> <li>High likelihood to have gone tent camping or rented cabin in past two years</li> <li>Important considerations for leisure trips include visiting a location with natural beauty/lesser known destinations, outdoor sports/recreation</li> <li>High usage of travel-related apps</li> <li>Skew Caucasian and Millennial</li> </ul> <p>Mean Age: 43.6 68% Married, 32% with Kids Slight Female Skew</p>	<ul style="list-style-type: none"> <li>Moderate opportunity segment</li> <li>Important considerations for leisure trips include taking advantage of learning opportunities, having a romantic getaway, exploring a less known destination, visiting family, spending time in nature, attending sporting events</li> <li>2<sup>nd</sup> highest percentage of African Americans</li> <li>Least likely to have kids</li> <li>Least affluent segment</li> </ul> <p>Mean Age: 47.4 Single/Divorced only 15% with Kids Skew Male</p>

	Active Family Adventurers	Nature Lovers	Kid-Free Adult Adventurers
Travel & Lifestyles	<ul style="list-style-type: none"> <li>Domestic travelers</li> <li>Family-focused</li> </ul>	<ul style="list-style-type: none"> <li>Independent travelers</li> <li>Environmentally conscious</li> </ul>	<ul style="list-style-type: none"> <li>Traditional travelers</li> <li>Environmentally conscious</li> </ul>
Retail & Shopping	Shopping is relaxing	Buy things friends approve of	Shop at specialty stores
Electronics & Technology	Tech savvy	Social techies	Tech novices
Online	Above Average	Above Average	Below Average
Television	Average	Below Average	Above Average
Radio	Average	Above Average	Above Average
Print	Above Average	Above Average	Average



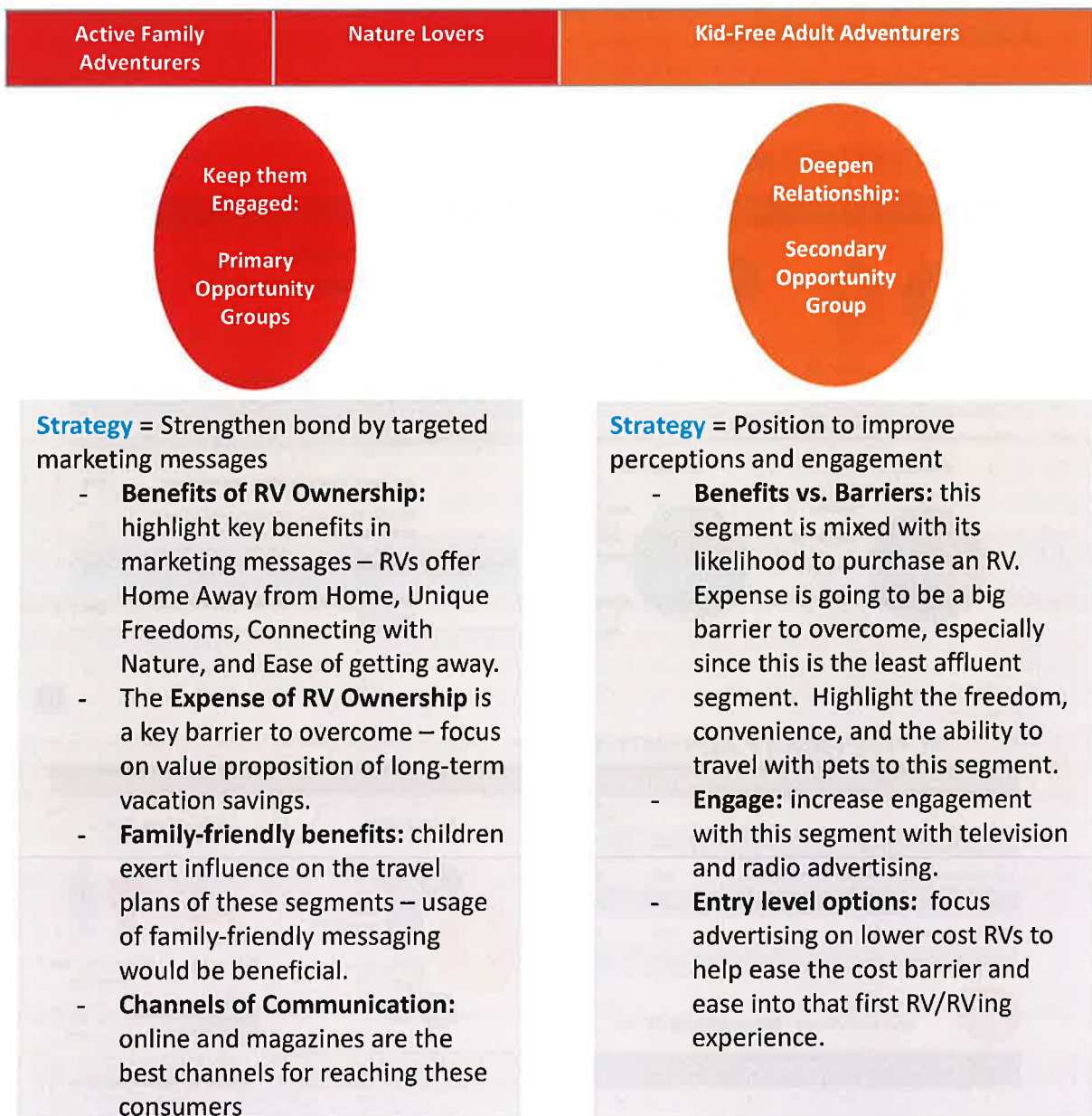
Several themes emerge from examining these high potential segments. Not surprisingly, the highest opportunity segments are a lot like owners. They have a very favorable view towards RVs and tend to embrace the RV culture/life-style.

The lower opportunity segments are not likely to be swayed into purchasing an RV. They are unlike owners and top prospects alike. They are simply not interested in the tasks/chores associated with owning an RV and prefer leisure trips that do not revolve around camping/outdoor sleeping arrangements.





## Recommendations for Engaging With High Opportunity Segments

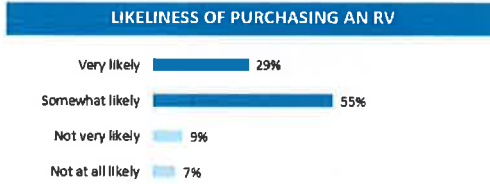
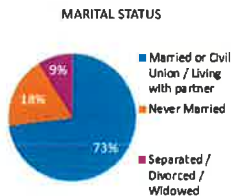
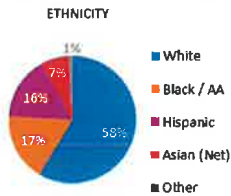
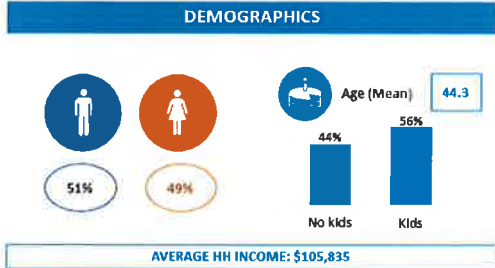


## Appendix – Snapshot of Segment Details

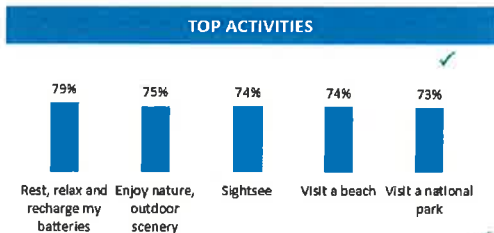
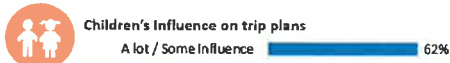
### Active Family Adventurers



#### ACTIVE FAMILY ADVENTURERS

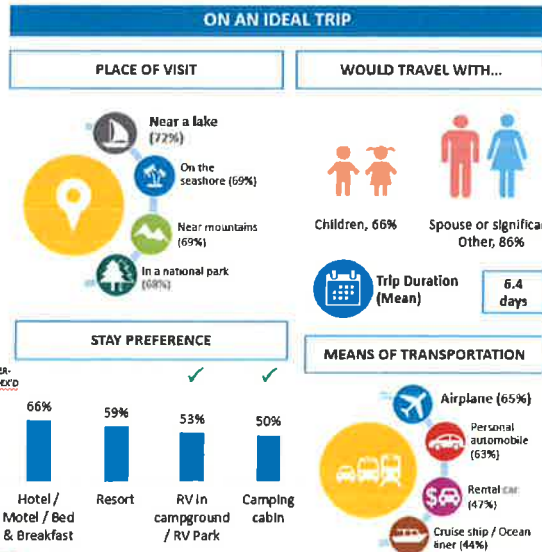


#### ACTIVE FAMILY ADVENTURERS



OVER-INDEXED

INDICATES OVER-INDEX



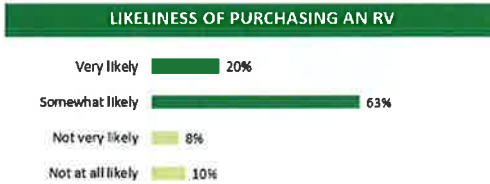
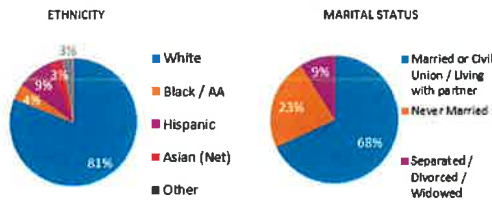
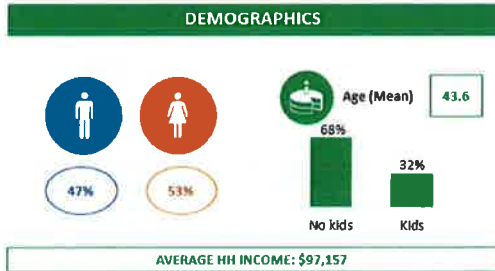
## ACTIVE FAMILY ADVENTURERS



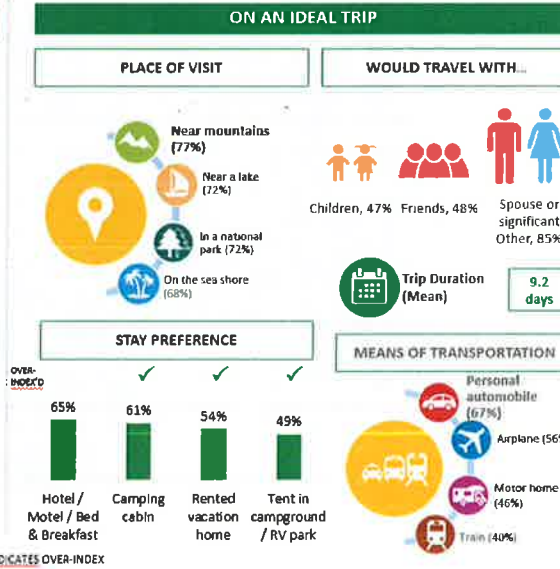
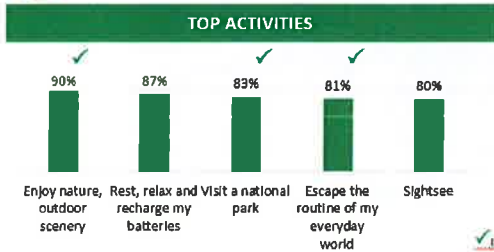
## Nature Lovers



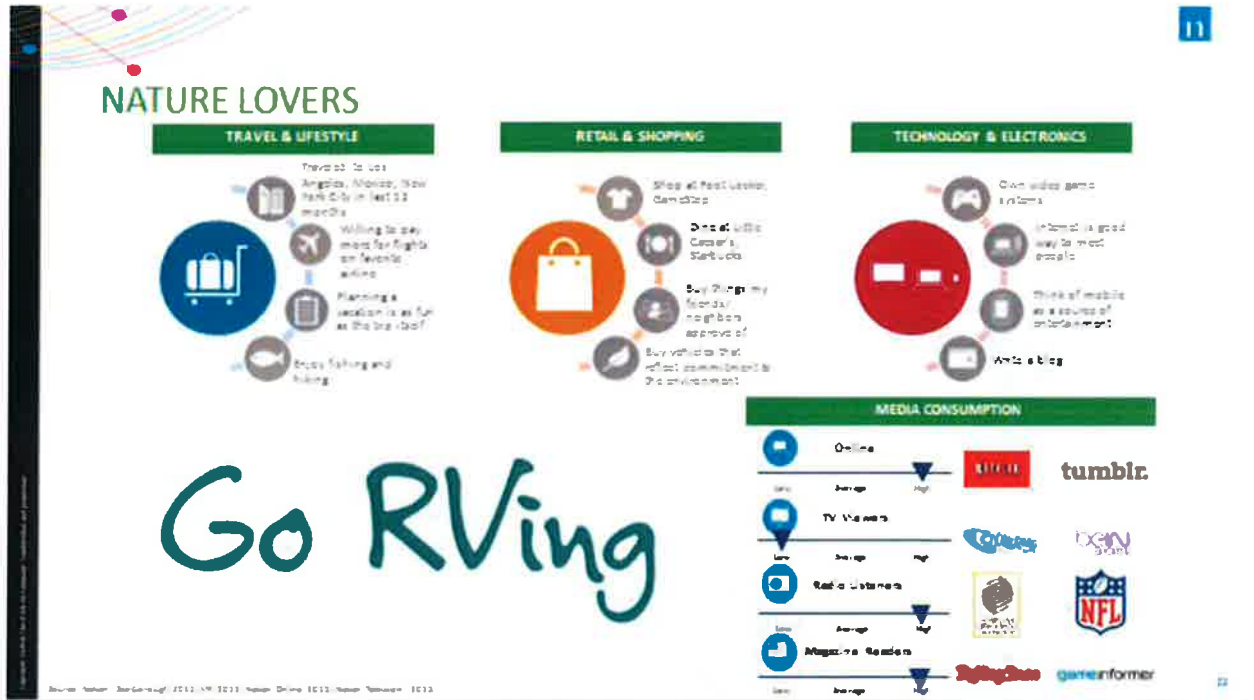
### NATURE LOVERS



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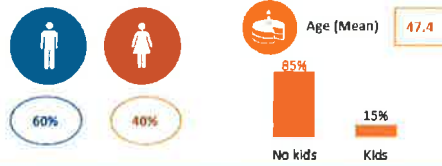


## Kid-Free Adventurers



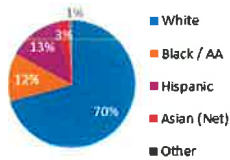
### KID-FREE ADVENTURERS

#### DEMOGRAPHICS

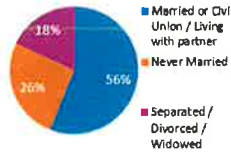


AVERAGE HH INCOME: \$93,647

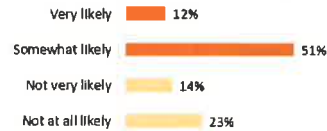
#### ETHNICITY



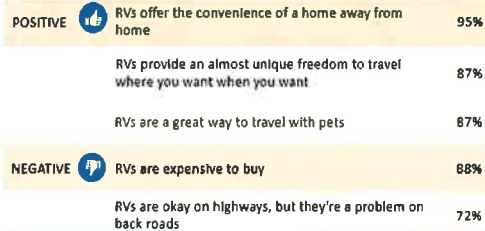
#### MARITAL STATUS



#### LIKELIHOOD OF PURCHASING AN RV



#### RV PROFILE AND ATTITUDE



### KID-FREE ADVENTURERS

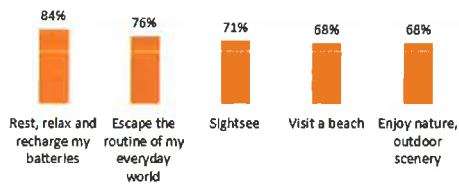
#### ACCOMMODATIONS/ENVIRONMENT

Food / dining / meal options	90%
Internet connectivity / WiFi	82%
A quiet, serene environment	80%
Protected indoor lodging	80%
Pool, lake, ocean, or other swimming opportunities	65%



Children's Influence on trip plans  
A lot / Some influence 19%

#### TOP ACTIVITIES

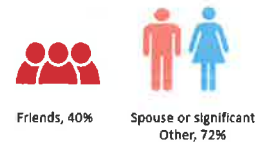


#### ON AN IDEAL TRIP

##### PLACE OF VISIT

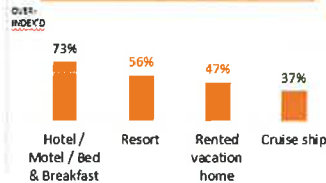


##### WOULD TRAVEL WITH...



Trip Duration (Mean) 7.3 days

##### STAY PREFERENCE



##### MEANS OF TRANSPORTATION

