

The Rubber Tire Market: An Exploration of the Nature and Size of a Rapidly Growing Market

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for the
Community Development Institute
Speakers Series

Themes Covered in this Presentation

- Research into Self Drive Tourism/ Rubber Tire Traffic
- Potential for tourism in BC
- The heterogeneity of the self drive market
- RVers and the boon docking issue
- Implications for BC

What is Rubber Tire Traffic / Self Drive Tourism?

- Also known as rubber tire traffic
- Includes those use a rental or their own vehicle, or RV- including motorhomes, trailers, fifth wheels, tent trailer or camper
- Rapid growth helped by
 - Ageing & retiring population
 - Increases in car ownership
 - Larger stronger cars which can pull larger loads
 - More flexibility in work schedules



Rubber Tire Traffic in BC

- 2003: 17.9 vehicles up to 4.5 tonnes in Canada
- RV ownership in Canada now higher than USA- 1 in 13
- 1996 research (so probably now outdated)
 - Non residents: 79% in car & 8% RV/Campervan
 - Residents: 86% in car & 4% RV/Campervan
- Very little research apart from recent Alaska H'Way study by Tourism BC



Results of Alaska Highway Research- Tourism BC 2004

- Typical expenditure per trip is \$6000 and \$150 per day
 - Travelers with campers or trailers lower than those in just vehicle or motor home
 - -40% expenditure on gas and vehicle maintenance
- 50% in self contained vehicle
- Ages: 24-35 = 15%; 35-54 = 32%; 55 yrs and over = 53%
- Those in self contained vehicles spent 20 more nights on their trips than those in cars, trucks or vans

What we Know about Drive Tourism

- Research into planning touring routes
- The drive tourist is not a homogeneous tourist
- Research has shown that the experience begins at home and may simply be the act of driving
- Travel to the destination is not always a given as not all drive tourists are destination focused
- Possibility of a “life cycle” of a drive tourist?
- Little research into motivations, decision making process or impacts upon communities



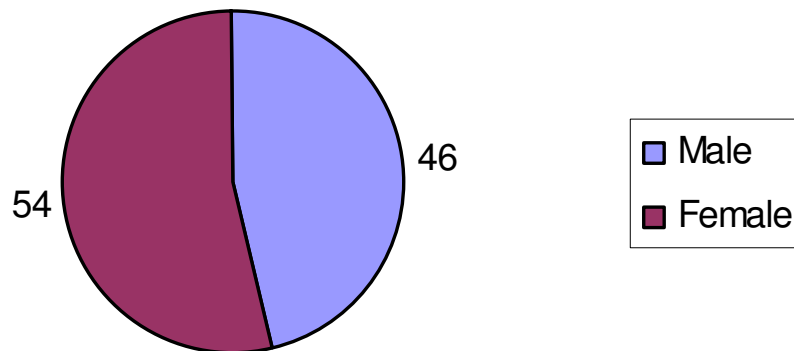
Methods

- 126 self completed surveys- quantitative
- 40 in-depth interviews- qualitative
- 4 focus groups-qualitative
- **Why Qualitative research?**
 - *“If it is our serious purpose to understand the thoughts of a people, the whole analysis of experience must be based on their experience, not ours (Boas, 1943)”*
- **Analysis techniques for Qual**
 - Transcription
 - Listening
 - Thematic analysis
 - Emergent themes
 - Constant comparison

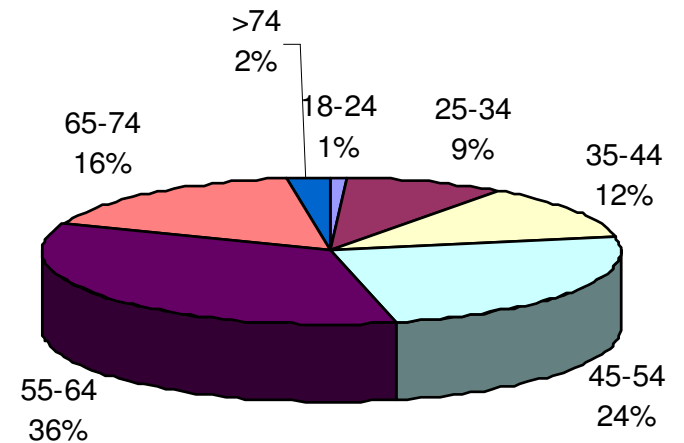


Results of the Self Completed Survey

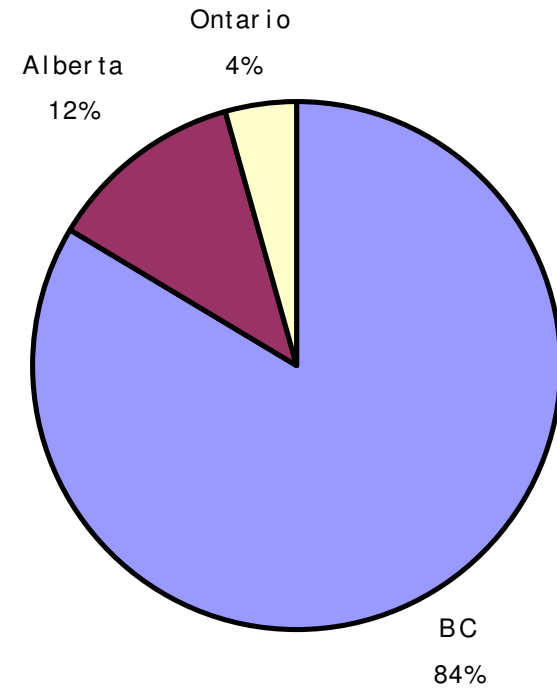
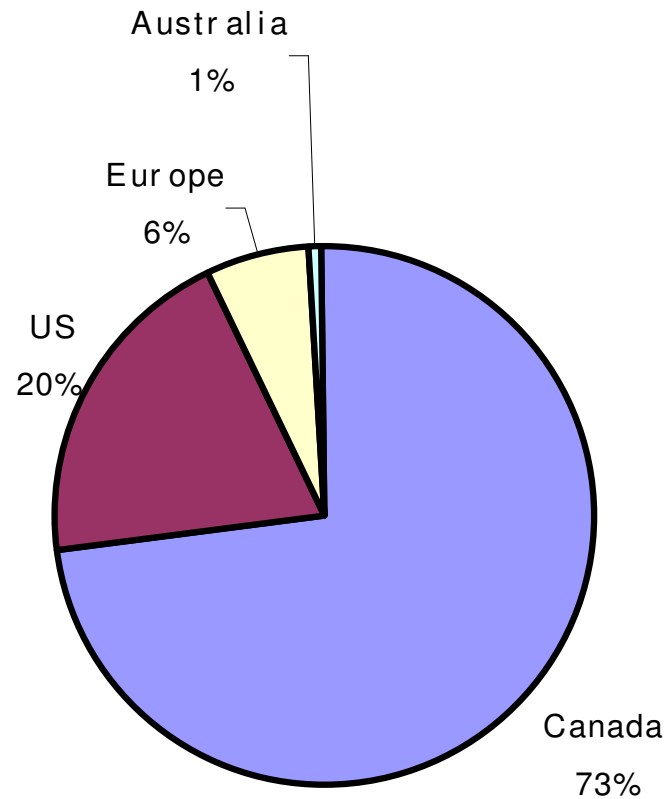
Gender



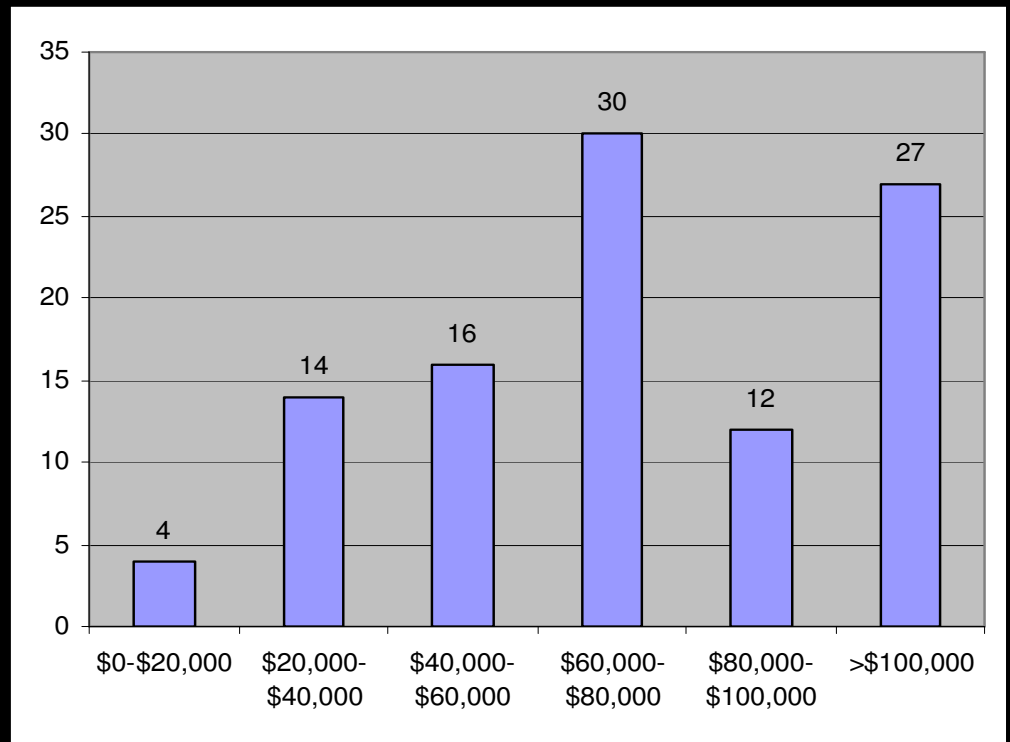
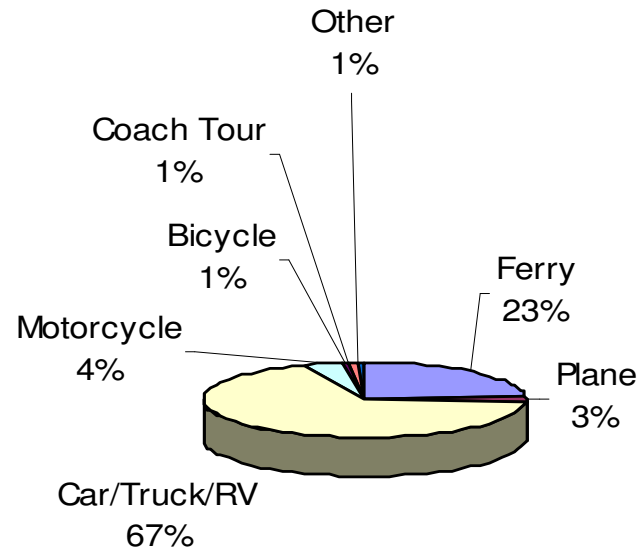
Age



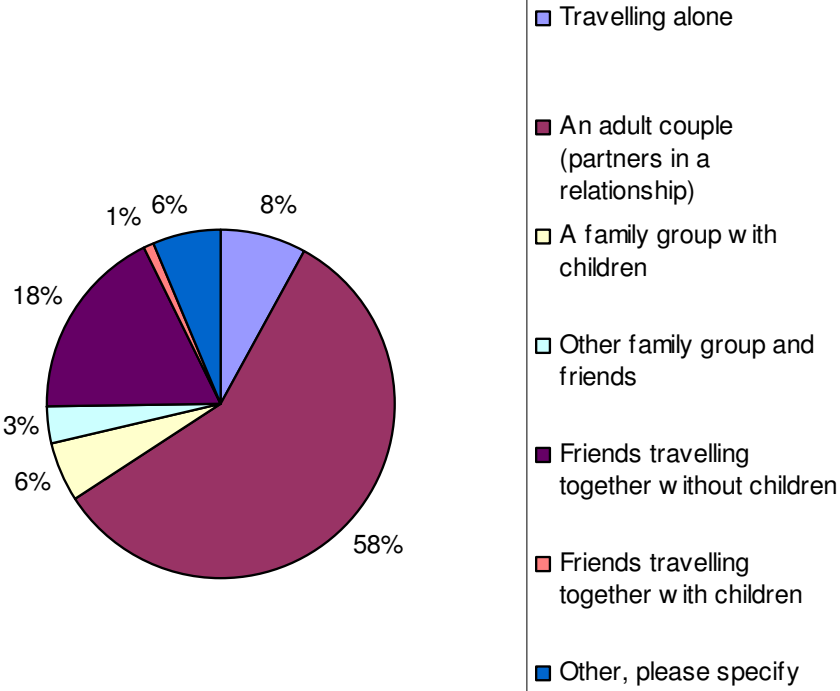
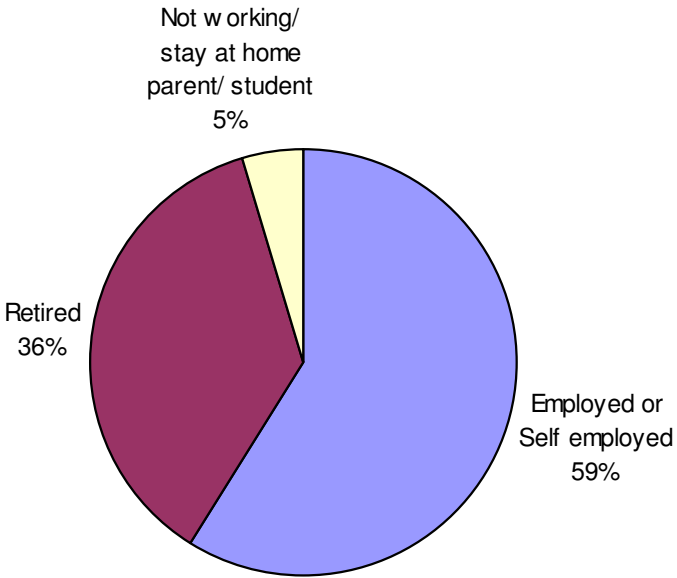
Where Visitors were From



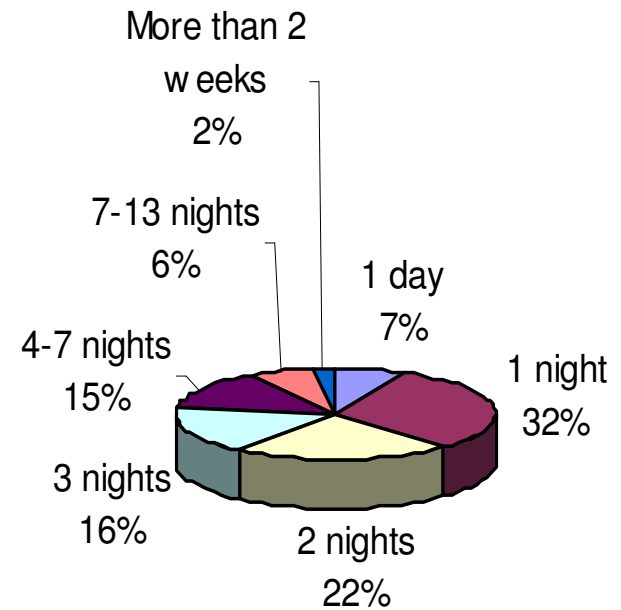
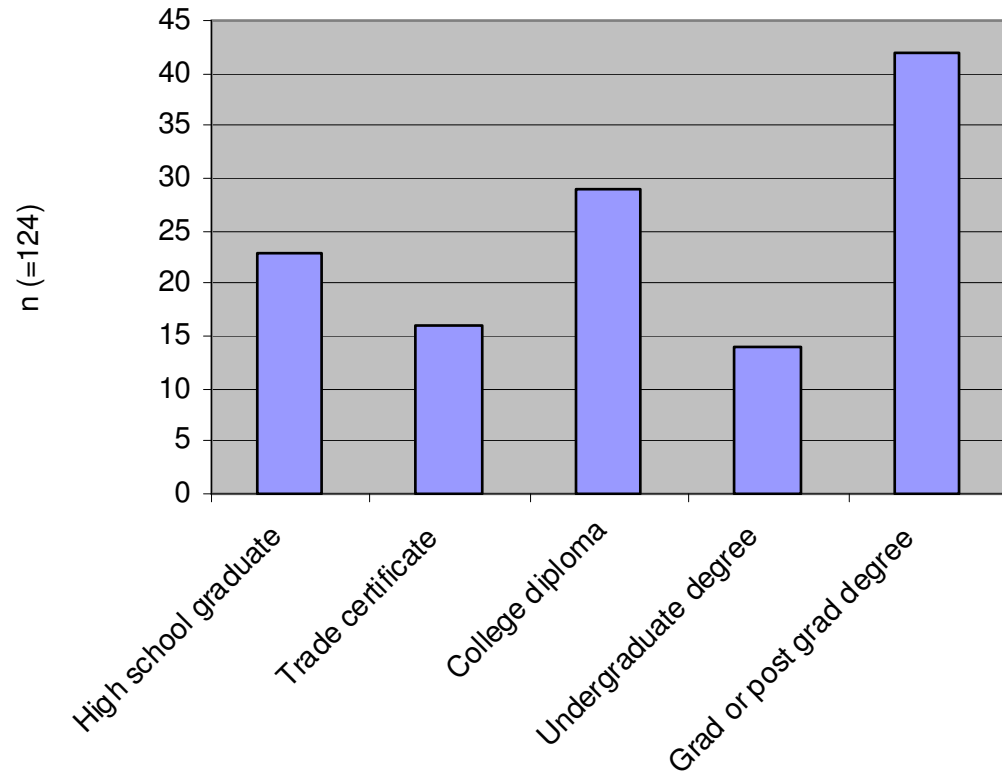
Transport to BCV & Income



Employment Status & Travel Party

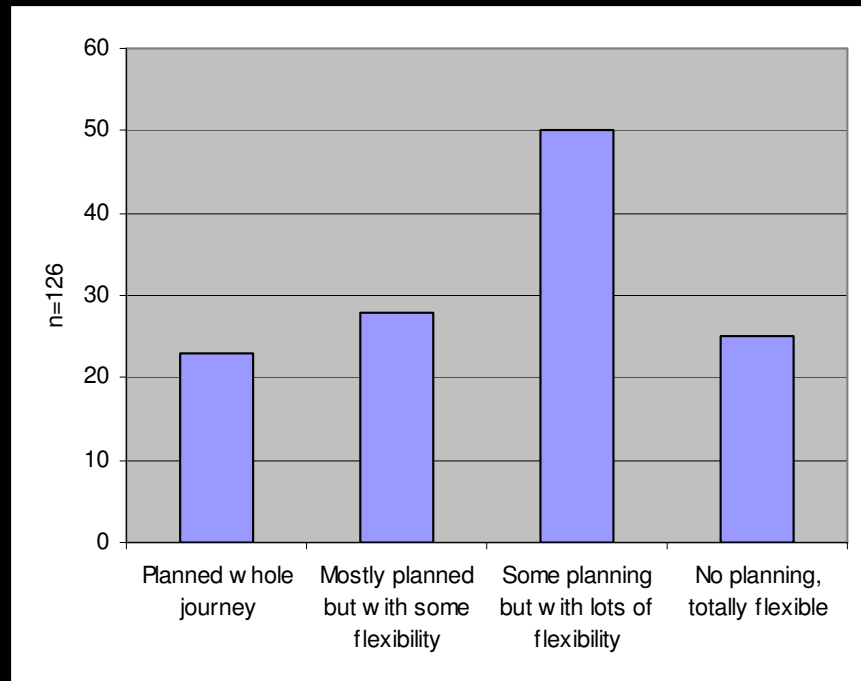


Education & Length of Stay in BCV

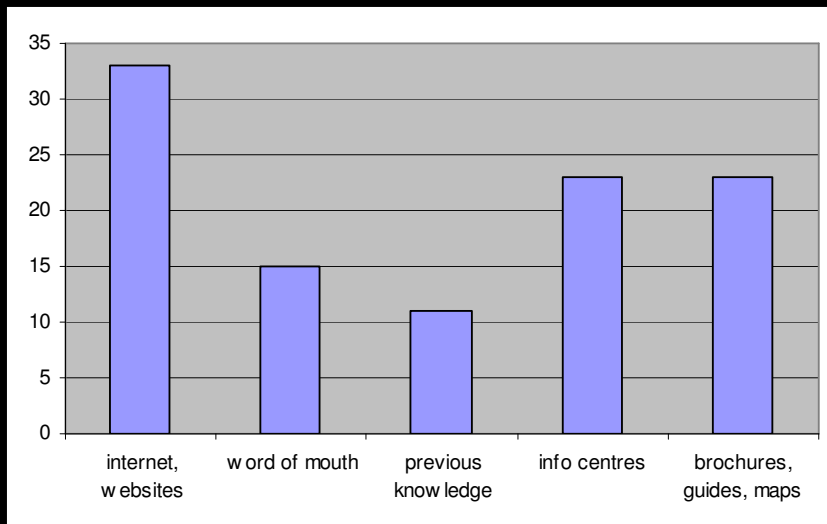


Road maps, tourist information centres, the Bella Coola website, word of mouth, previous visits and other websites were the most predominant forms of information sources

Planning habits of visitors



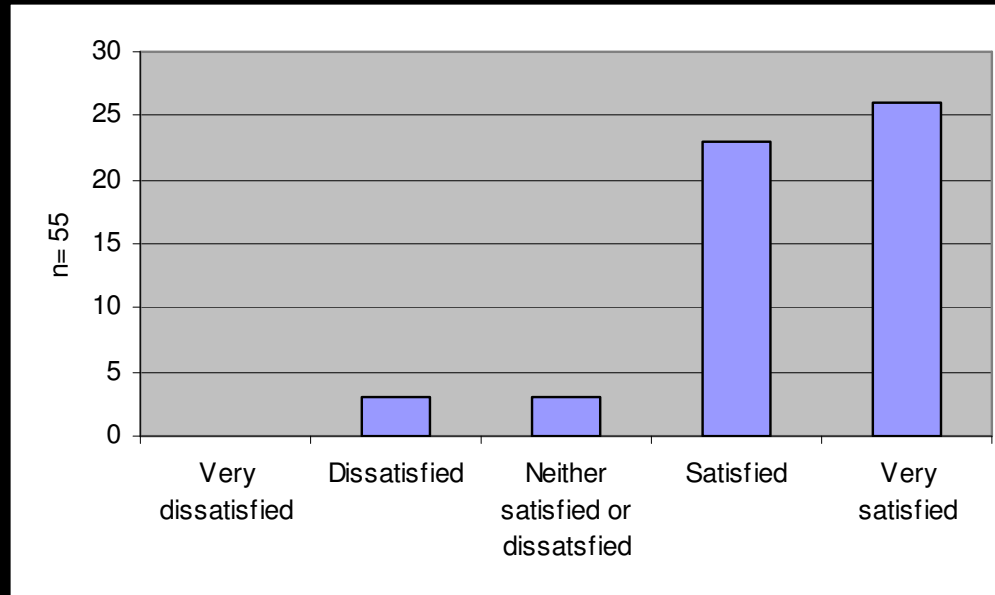
Most Useful Information Sources



Major Activities Undertaken by Visitors

Activity	Percentage (%)
Hiking	23
Visiting Museums and Art Galleries	14
Visiting Cultural Sites	9
Fresh Water Fishing	10
Salt Water Fishing	2
Visiting Historical Sites	11
Outdoor Adventure	12
Other	19

The BC Ferries Experience



Things most enjoyed

Responses

Crew, service

27

Scenery

14

Whale Watching

7

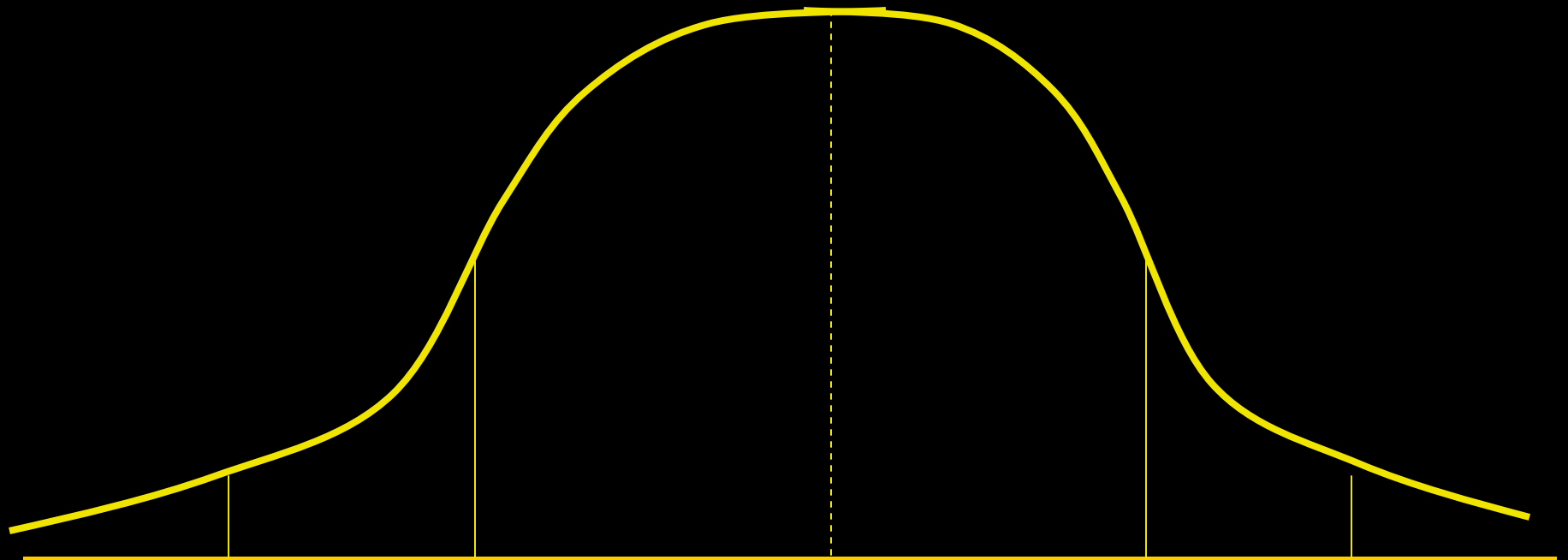
Food

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Atmosphere (stars, sleeping on the deck, music etc)

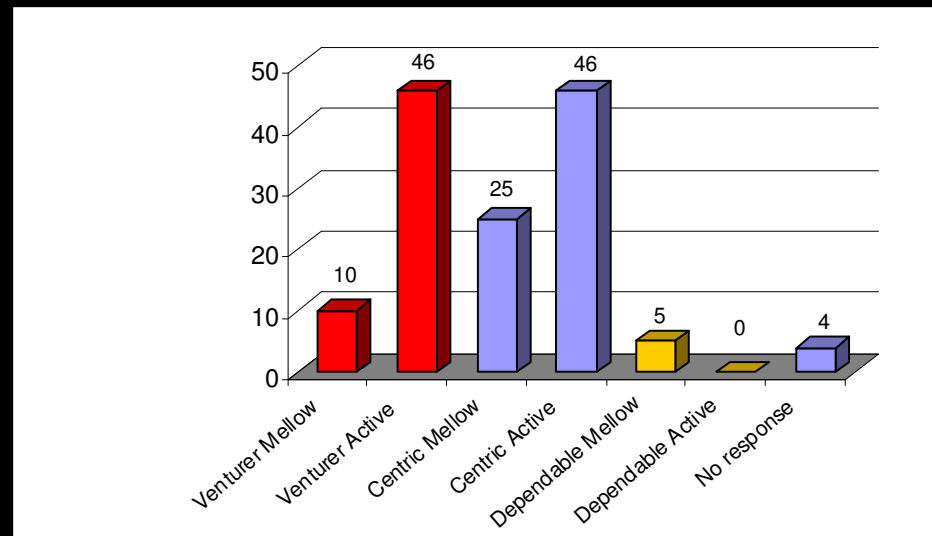
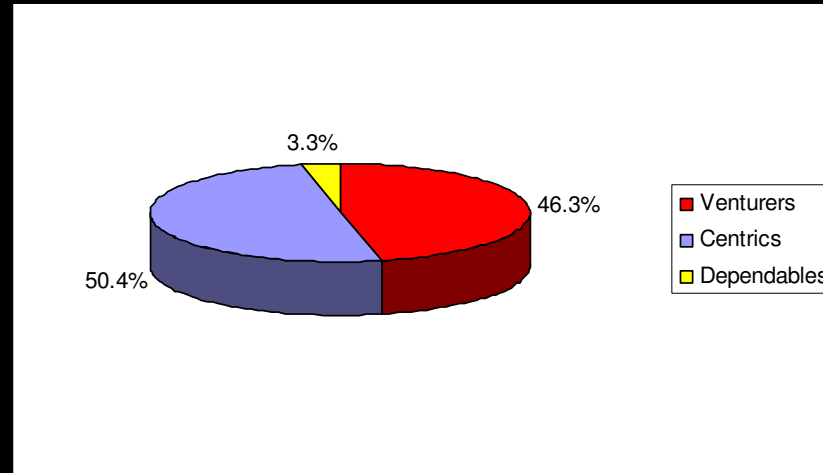
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Psychographic Attributes of Travellers to Bella Coola and Plog's Theory on Venturesomeness (2002)



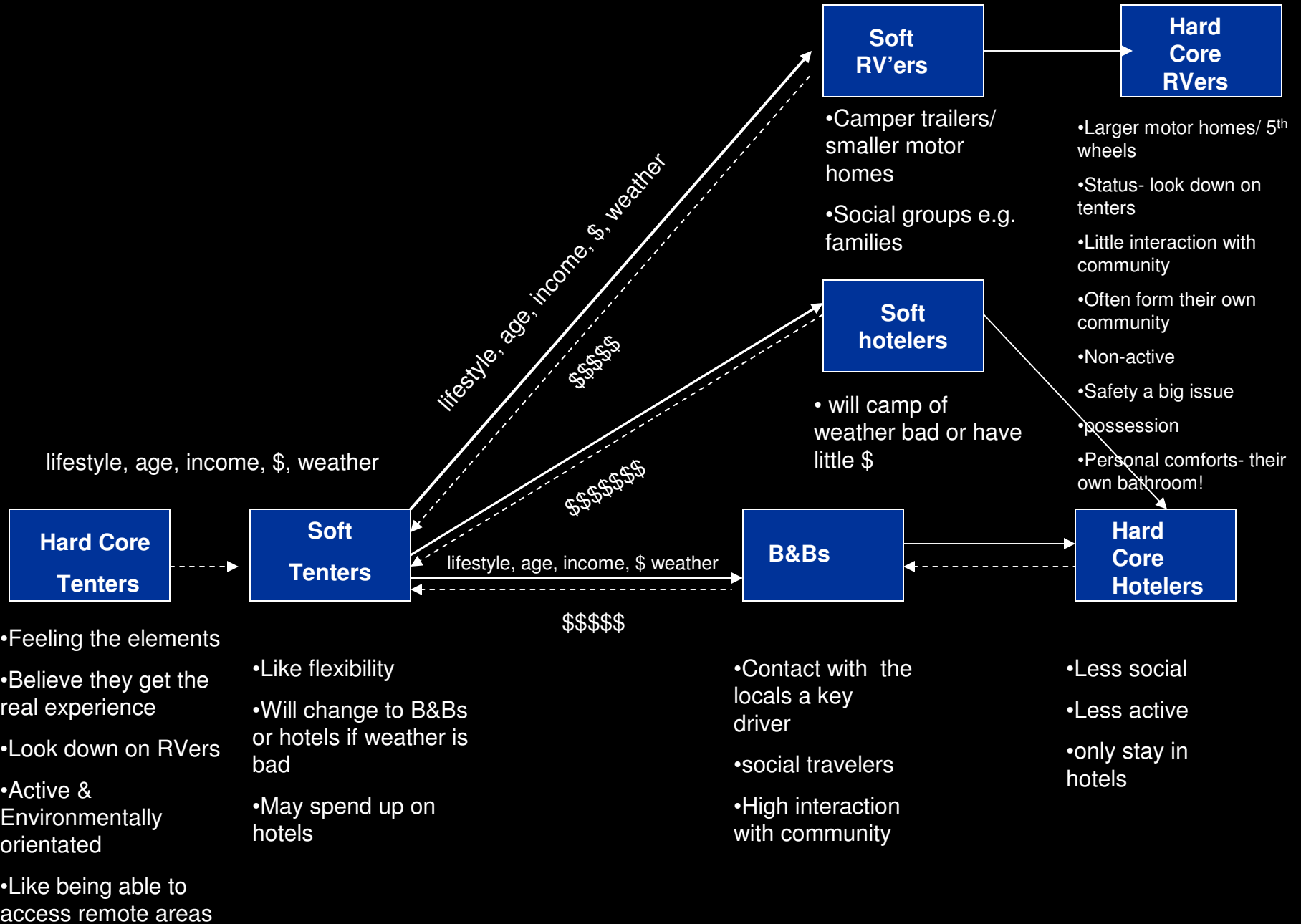
Venturers / Near Venturers / Centric Venturers / Centric Depend's / Near Dep's / Dependables

Psychographic Attributes of Travellers to Bella Coola



More interaction with wild lands & more physically active

Less interaction with wild lands and less physically active



Psychographic Characteristics of Visitors to the Bella Coola Valley

- **Active Venturers:** tend to be hard core tenters who are most interested in wilderness experiences and are most active;
- **Active Centrics:** tend to be soft tenters, B&Bers or soft core RVers. B&Bers in particular show equal interest in wilderness and cultural / heritage experiences;
- **Mellow Centrics:** tend to be hard core RVers who tended to show more interest in cultural/heritage experiences and light nature based experiences;
- **Mellow Venturers:** tend to be hard core hotellers who tended to show more interest in cultural/heritage experiences and light nature based experiences;

Boondocking:

Who are those RV'ers and should they be able to stay for free?

- Defined as RV travelers who “*who park free or for minimal cost in places where there are no amenities*” (Counts and Counts, 2004: 25)
- Boondockers appear to be a subset of “hard core RVers”
- Walmart provides the maps
- Some rural communities in Australia have provided free campsites in their township to contain boondocking
- A big issue : currently banned in car parking lots in Prince George



RVing Without Hookups. That's Boondocking!

Products per page: 12 Pages: 1 2 >



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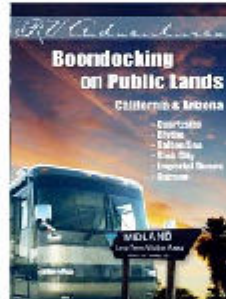
Add to Cart

RV Boondocking Basics

Learn how to live on a shoestring budget in your RV without hookups. Learn about solar panels, wind turbines, batteries, inverters and ways to get freshwater and get rid of waste water without moving...

ID: B0071

[Learn More](#)



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(30% off!)

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Boondocking On Public Lands, VHS Video

Join host Heather MacDonald as she takes you to the boondocking hotspots of the Southwest including Quartzsite, Ariz., Slab City and the Salton Sea in California and all the Long Term Visitor Areas,...

ID: V0015

[Learn More](#)



\$12.95

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Qty 1

Add to Cart

2005 RVers Friend (Truckstop Directory)

This handy directory lists every Travel Center in the U.S. and Canada and the services each provides to RVers. Learn which offer overnight stays, dump stations, Internet access, propane or other...

ID: B00187

[Learn More](#)

Taking a look inside boondockers' behaviour

- Preliminary in-depth interviews of RVers who “boondock” in Walmart
 - Cost and safety are major drivers for boondocking, along with convenience
 - Some are dedicated boondockers – 90% - 100% of the time
 - *“we only ever stay in hospitals and Wal-Mart, we stay where there are people...”*
 - *“we only stop in Wal-Mart now- they are RV friendly”*
 - When not boondocking , these RVers appear to choose places based on cost, followed by peace and quiet
 - Some rarely boondock except for when arriving late at night and leaving early in the morning, or when gas prices are high
 - *“Because of the gas prices, we are trying to save”*
 - When not boondocking , these RVers appear to choose places based on facilities (these people will choose RV parks), -*“If the place is nice, we don't mind paying...”* - followed by cost or peace and quiet (these people will tend to prefer Provincial parks),
- When boondockers consider Provincial Campgrounds.....
 - those who choose to stay there, do so because of the cost and quietness
 - those who don't stay there, do so because of lack of facilities, followed by cost
- When boondockers consider Privately owned RV Parks
 - those who choose to stay there, do so because of the facilities
 - those who don't stay there, do so because of expense

Perceptions of Boondockers

- Research to compare residents (n=72), operators (n=7) and decision makers' (n=7) perceptions of the issue in Prince George
 - Conducted by RRT 410 students
 - Majority of decision makers acknowledged PG's by law banning boon docking, but were in favour of free camping; majority of RV park owners against it and residents were mixed
 - Decision makers perceived mainly positive economic benefits from free camping; as did RV park operators and residents



What has this Research Taught Us

- The drive tourism/rubber tire traffic market is heterogeneous and differs from region to region
- Importance of research- we need to know more!
 - Doing the appropriate research to answer the questions you need answered
 - Internet and word of mouth are so important- even many elderly RVers are technologically literate!
- Importance of planning
 - Development of product that matches your market, your community and societal trends
 - Consistent product and provision of signage imperative to keep independent travelers feeling “safe”
 - Flexibility of the market (in terms of planning) in both Aus and Canadian research is promising for regional tourism development
 - Tourism is a consumptive industry and impacts have to be managed- rubber tire traffic may not be the panacea for all communities

