

THE WINTER TEXAN 2017-18 *Survey Report*





THE WINTER TEXAN

2017-1018 *Survey Report*

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Penny M. Simpson, D.B.A., Director
penny.simpson@utrgv.edu • (956) 665.2829
Fax: (956) 665-3312 • utrgv.edu/tourism

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Some photos courtesy of the *Winter Texan Times*.

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Executive Summary

Each year, retirees from all over the U.S and Canada venture to the Rio Grande Valley area to spend the winter. These retirees, known as Winter Texans, provide a substantial boost to the region's economy. In an effort to better understand their activities, interests and impact on the region, the Business and Tourism Research Center in the Robert C. Vackar College of Business and Entrepreneurship at The University of Texas-Pan American and now The University of Texas Rio Grande Valley has conducted research on this market for 30 years.

This year's study included 744 Winter Texans respondents and 63 RV and mobile home park manager/owner respondents. Winter Texan participants submitted survey responses at a Winter Texan Expo (15.5%), online (43%) or returned by mail a completed a hard copy version of the survey that was inserted in the *Winter Texan Times* newspaper (41.5%). The results of both the Winter Texan and the Park surveys are summarized here in seven sections: demographic characteristics and stay characteristics, expenditures in Mexico, expenditures in the Valley, Other winter destinations, Internet use and the Park study.

Demographic Characteristics

The average Winter Texan participating in this year's study:

- is female (57.2%),
- is 72.3 years of age,
- is married (84.6%),
- is white (97%),
- is retired (91.9%) and has been retired for more than a year (88.6%),
- has at least some college (40.1%) or a bachelor's, graduate or professional degree (32.8%),
- is in a 2-person household (86.8%),
- has an annual household income of \$64,500 with 56.2% of Winter Texans having an income between \$30,000 to \$70,000, and
- comes from Minnesota (16.3%), Canada (14.3%), Iowa (9.7%), Wisconsin (8.8%), Illinois (7.7%), Missouri (5.7%), Michigan (6.8%) and Nebraska (3.0%).

Further, Winter Texans 65 years of age and older participating in this study are, on average, more educated and have a higher household income level than their counterparts in the U.S. population in general. There are fewer Winter Texans in the 65 to 69-year-old age range than in the U.S. population in general but more in the 70-years-of-age or older age range.

Stay Characteristics

Knowing where Winter Texans live while in the Valley, how long they stay, why they come and what they do while in the Valley is crucial to providing for their needs so they will continue to come and significantly impact the region's economy. This is the first winter for 5.4% of study respondents; but overall during their stay in the Rio Grande Valley, the typical Winter Texan in this study:

- has come to the Valley for 11.3 years,
- stayed in the Valley for 133 days,
- owns a Valley residence:
 - 50.2% own a mobile home/park model
 - 32.2% own an RV
 - 5.0% own a house or condo

As in past years, most Winter Texans come to the Valley because of:

- the climate (80.8%),
- cost of living (70.9%),
- friendly people (60.8%), and
- the social activities (48.1%)

The most popular Valley activities for this year's study participants include:

- visiting flea markets
- visiting historical sites
- attending festivals
- attending music or jam sessions
- going to the beach
- visiting wildlife/nature refuges

Overwhelmingly, the Winter Texan study participants plan to return to the Valley next year (95.5%), suggesting their satisfaction with the area. They reported that poor health (59.3%) or family reasons (28.5%) would be the most likely reasons to prevent them from returning.

Economic Impact

Included in this year's report is a study of RV and mobile home parks where most Winter Texans typically stay. Using a listing of parks and information from questionnaires completed by park managers or owners, an estimated 106,000 Winter Texans or 56,700 households were in the Valley during the 2017-2018 winter season.

On average, Winter Texans visited Mexico (85.3%) for an average of 5.1 trips during their stay in the Valley. They spent an average of \$104 to \$151 per trip, depending on the method used for estimation. With about 56,700 Winter Texan households in the Valley, the average, direct economic impact of Winter Texans on Mexico border towns is about \$32 million.

On the U.S. side, Winter Texan households spent an average of approximately \$6,257 on routine, monthly purchases and about \$3,058 on major, one-time purchases. This represents an average expenditure in the Valley of about \$9,314 per household. By multiplying this average household expenditure times the estimated 56,700 Winter Texan households in the Valley, this study estimates that Winter Texans spent about \$528 million, in nominal dollars, while in the Valley in 2017-2018.

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Introduction: The Winter Texan 2018 Study

For more than 40 years, retirees from the northern parts of the United States and Canada have traveled to the Rio Grande Valley (RGV) to spend their winters in the temperate climate of South Texas. The RGV or “Valley” region spans the area from South Padre Island to Rio Grande City. This 110 mile region borders on Mexico and the Gulf of Mexico and offers visitors of all ages a wide variety of activities throughout the year.

The combination of warm winter weather, numerous outdoor activities, numerous RV and mobile home parks, friendly people, and a low cost-of-living are powerful incentives in attracting wintering visitors. Since 1987, the now named Business and Tourism Research Center in the Robert C. Vackar College of Business and Entrepreneurship at The University of Texas Rio Grande Valley (UTRGV) has conducted research about these winter visitors to the Valley to examine their opinions, activities, expenditure patterns, and especially, their economic impact on the region. Prior studies indicate that the retired winter visitors to the Valley, dubbed “Winter Texans,” typically stay anywhere from 3 weeks to 6 months and have had a direct impact on the regional economy of \$92 million in 1987 to more than \$803 million in 2010 at the peak.

This report presents the results of two different studies essential to estimating the number of Winter Texans in the RGV region. The first study was conducted among Winter Texans whereby a questionnaire was distributed to Winter Texans via an insert in the *Winter Texan Times* newspapers and was made available online. The results from this study are presented in this report in multiple sections. The first section presents survey completion

method, the second section details demographic characteristics of the Winter Texan study respondents and the third section presents respondents’ stay characteristics (length of stay, type of housing, etc.), activities engaged in while in the RGV and the likelihood of returning to the RGV next year. The next two sections show Winter Texan expenditures by spending category, first in Mexico border towns and then in the RGV. The sixth section presents other past destinations of Winter Texans and the final section presents Winter Texan reported use of the internet. Most of the study results are shown along with results from past Winter Texan reports since 2006 to better understand changes in the Winter Texan market over the time period.

The second study was conducted among RV/mobile home parks owners and managers. Because most Winter Texans live in RV/mobile home parks, the RGV park managers/owners are sent a questionnaire designed to determine the number of Winter Texans living in the parks during the Winter Texan season. An estimate of the number of Winter Texans in the RGV may then be drawn by generalizing responding park Winter Texan numbers to the population of Winter Texan parks. Results from both studies are then used to estimate the number of Winter Texans in the RGV during 2017-2018 and their economic impact on the region’s economy.

The next section explains the methodology used in the Winter Texan study.



Methodology

Research Design

A questionnaire designed to determine the demographic and stay characteristics and activities of Winter Texans and their spending while in the RGV was developed a number of years ago. Much of this original questionnaire was used in this year's study for consistency purposes. The questionnaire, shown in Appendix A, contains questions about home state, Valley stay characteristics (length of stay, type of housing, etc.) and participation in various activities while in the Valley. The questionnaire also asks respondents to report their monthly and one-time expenditures while in the Valley as well as their travel to and expenditures in Mexico border towns. Unique to this year's study are questions about other winter destinations visited and internet usage.

This year's questionnaire was inserted into 20,000 copies of the *Winter Texan Times* during the last week of January. This seasonal publication specifically targets Winter Texans and is distributed for free to RV and mobile home parks, restaurants and other venues frequented by Winter Texans throughout the RGV. A link to the questionnaire along with an invitation to participate in the survey was also placed on the *Winter Texan Times* website. Winter Texans were encouraged to participate in the online survey through RGV newspaper articles. Additionally, questionnaires were distributed and collected at the Winter Texan-targeted 2018 Travel, Health & Wellness Expo held at the McAllen Convention Center on February 13th.

All surveys invited participants to either complete the questionnaire online at utrgv.edu/wintertexan or to send the completed hard copy to the Business and Tourism Research Center by mail before February 26, 2018. No envelopes or prepaid stamps were provided. Participating respondents were promised the chance to enter a drawing for a Kindle Fire.

Study Limitations

This study is subject to limitations that should be taken into account when interpreting the results. For example, participants in the research were self-selected and may not represent the Winter Texan population as a whole and respondents may have answered survey questions incorrectly by intent, by failure to remember correctly or simply by data entry error. When obvious, these probable errors were deleted from consideration. This year's questionnaire was long and many respondents may have opted out or completed the questionnaire in stages, which may have affected responses. Finally, respondents may not have understood the questions correctly and thus responded erroneously. These types of errors are present in almost all survey research and should be considered when interpreting the results.

Especially troubling in this year's study were reports of monthly expenditures while in the RGV. A number of this year's respondents indicated spending from \$20 to \$100 each month on housing and on groceries, which is very likely understated. While many older seniors tend to be more frugal, the cost of leasing land for park models and mobile homes is usually at least \$300 per month and RV lots can run over \$600 per month. Insurance and taxes may also be a cost that should be included in the total housing cost per month. As a partial remedy, monthly expenditures of less than \$100 for housing and \$50 for groceries were deleted.

Given all the limitations of survey research and this study specifically, results should be interpreted within a large margin of error—about plus or minus 10 percent—to account for survey and sampling error.

Note: Due to rounding, percentages in the tables and figures provided in the narrative of the study results may not sum to exactly 100%. Note also, that all dollar figures provided are in current, nominal U.S. dollars and have not been manipulated to be adjusted to real dollars.

Study Results

Survey Returns and Return Method

A total of 744 useable questionnaires were received from respondents who were self-identified as Winter Texans. A total of 309 completed paper questionnaires were returned by mail and 115 were collected at the 2018 Travel, Health & Wellness Expo. About 393 respondents began the study online but 73 were incomplete and were omitted. Of the total 744 total responses used in this analysis, 320 were submitted online (43%), 309 (41.5%) were returned by mail (45.3%) and 115 or 15.5% were collected at the Expo as shown in Figure 1

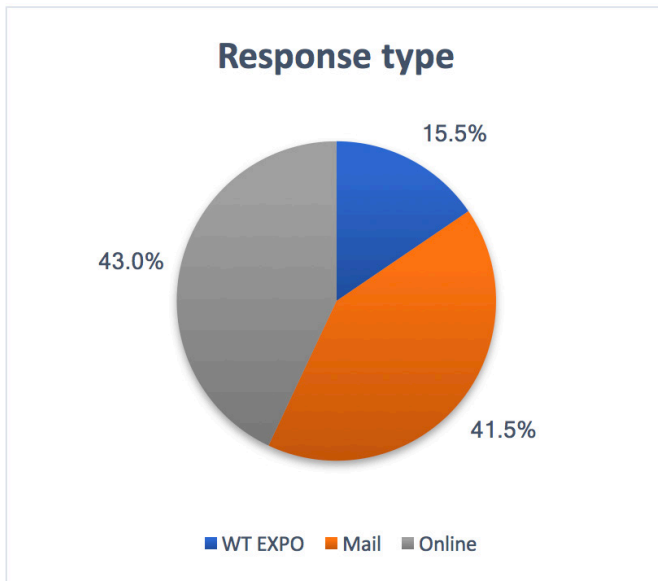


Figure 1. Method of survey return

Results: Demographic Characteristics

On average, Winter Texans participating in the 2018 study were 72.3 years of age, married (84.6%), Caucasian (97%), and have been retired for more than one year (88.6). Most respondents are female (57.2%) and 56.2% have an annual household income between \$30,000 and \$70,000, with an average income of \$64,500.

The following section details the demographic characteristics of Winter Texans in this year's survey and compares the results with the demographic characteristics of Winter Texans in the past five studies to better understand the changing demographic profile of Winter Texans. This section also compares this year's demographic results with those of the 65-year-and-older age group according to the United States Census data. The census data is extracted from the 2010 American Community Survey data available online at www.census.gov. This age group is used for comparison purposes because most Winter Texans (85.2%) are in that age group. This comparison allows an understanding of how Valley Winter Texan demographically compare to the same age group in the U. S. population in general.

The demographic characteristics examined in this study include age, gender, ethnicity, marital status, education level, household

income, and employment status. Each of these characteristics and the relevant comparisons are presented next.

Age

The average age of Winter Texans participating in the 2018 study is 72.3 years of age, with respondents' ages ranging from 48 to 98. Figure 2 shows the average age of Winter Texans participating in the current and past five surveys and shows that the average age had steadily increased by about 5.2% since 2006 but seems to have leveled off with this year's survey respondents.

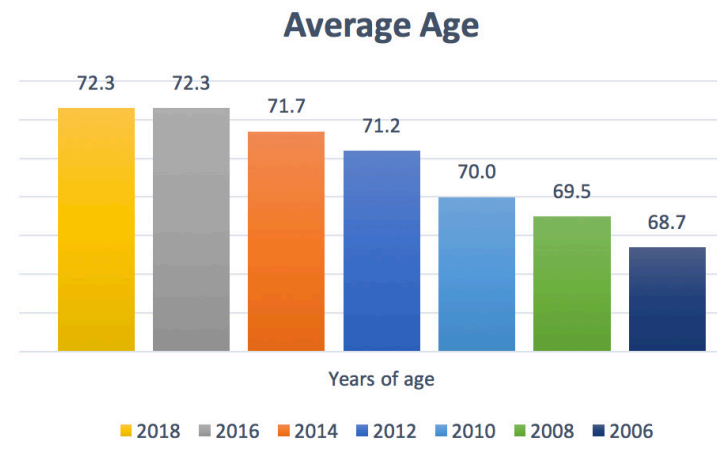


Figure 2. Average age

The age distribution of Winter Texans participating in this year's study is reported in Figure 3. Not surprisingly, most Winter Texans are 65 years-of-age or older (85.2%). In this year's survey, slightly more Winter Texans were under 65 years of age than in previous studies conducted since 2012. For example, 14% of Winter Texans were between 55 and 65 years-of-age whereas 12.1% were in this age group in the 2014 study. Nevertheless, the number of younger Winter Texans is still far below 2006 when about 26.3% of Winter Texans surveyed were younger than 65 years-of-age.

Several reasons could explain the overall increase in the Winter Texan age level. Fewer new 'young' (under 65 years of age) Winter Texans may be coming to the Valley or they may be deferring retirement for economic or other reasons, although this trend may be reversing. Second, some 'young' Winter Texans from prior years may be staying home or trying new places instead of returning to the Valley. Or more new, older Winter Texans may be coming to the Valley. Fourth, the regular, returning Winter Texans may be staying healthy longer and continuing to return to the Valley; thus, the percentage of older Winter Texans to younger ones would increase. Traditionally, health is the primary reason that Winter Texans give for not returning to the Valley, so that if they stay healthy, they return. Finally, the younger Winter Texans may not be participating in this study while older ones do.

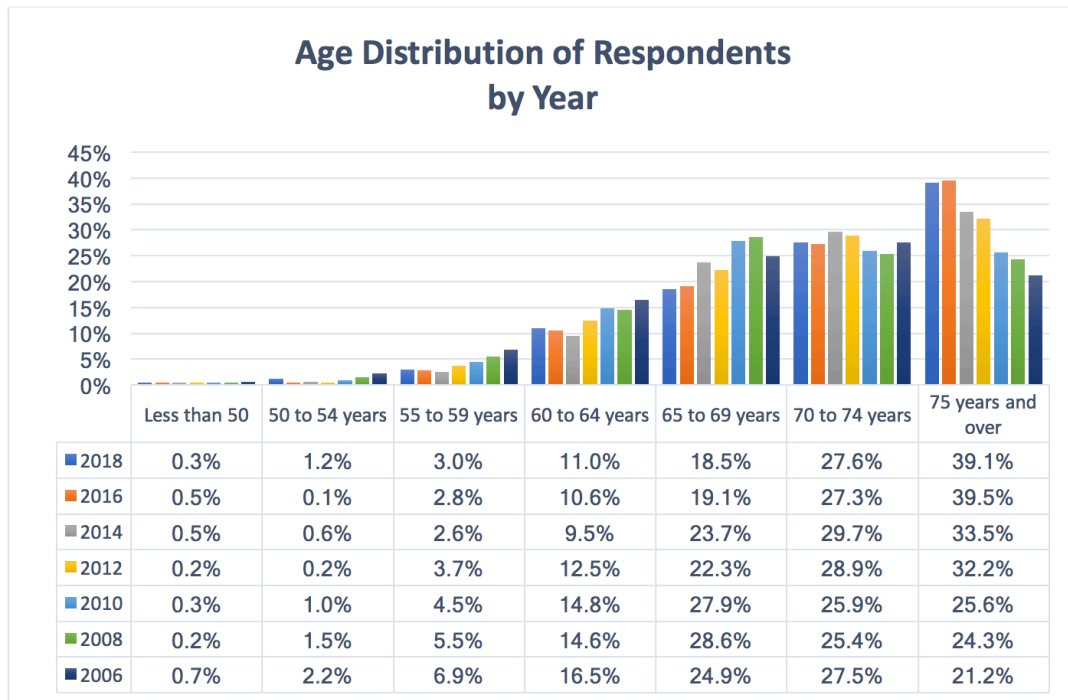


Figure 3. Age distribution of respondents

Figure 4 is a comparison of the age distribution of Winter Texans who are 65 years and older to that of the corresponding age group in the U.S. population. The U.S. 65 and over population data used in this study for comparison purposes were obtained from the 2010 Census available online at census.gov. For the purposes of this analysis, only Winter Texans in the 65 and older age group are considered.

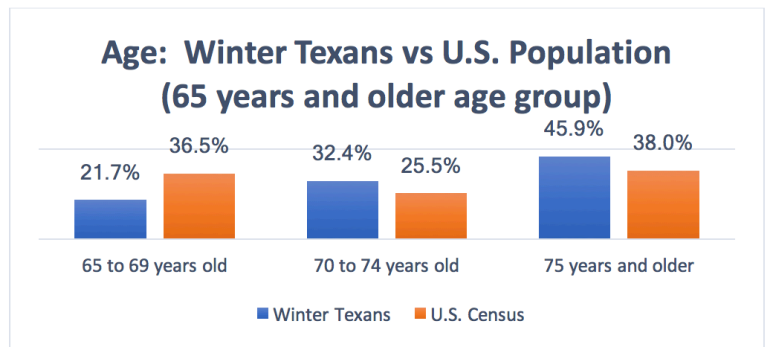


Figure 4. Age comparison

Figure 4 shows that there were proportionately more 2018 RGV Winter Texan participants 70 years-of-age and older than in the same age category for the U.S. population in general but fewer Winter Texans in the 65 to 69 year-old age category than in the U.S. population. This suggests that the RGV Winter Texans are older, in general, than the over-65 U.S. population.

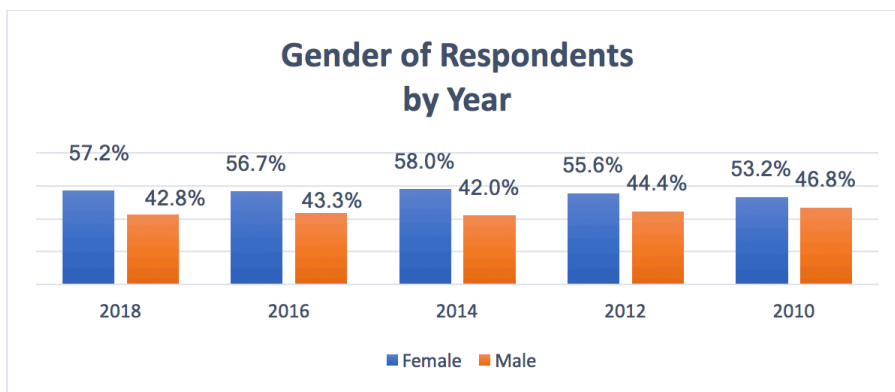


Figure 5. Gender

Gender

Figure 5 shows that most 2018 Winter Texan study respondents were female (57.2%), consistent with all past Winter Texan studies.

The higher representation of over 65-year-old females in the study sample is slightly higher than the same age group population in the U.S., as illustrated in Figure 6.

Gender: Winter Texans vs U.S. Population (65 years and older age group)

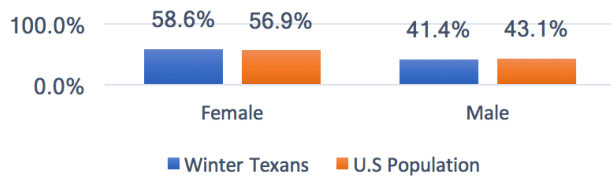


Figure 6. Age comparison



Race

As Figure 7 shows, Winter Texans almost exclusively consider themselves white. The figure also shows that Winter Texans have been predominantly white over the past years of study although this year's study sample was slightly more diverse than in any other past study.

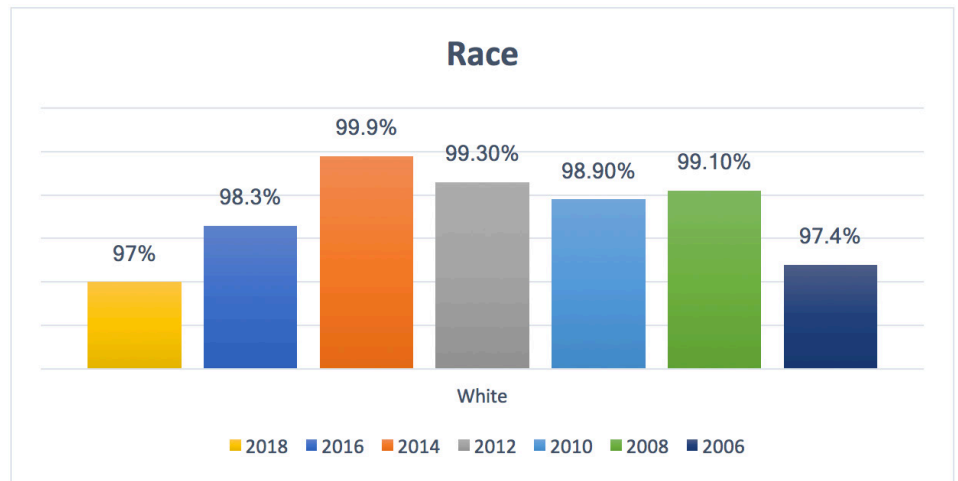


Figure 7. Percent of white respondents

Marital Status by Year

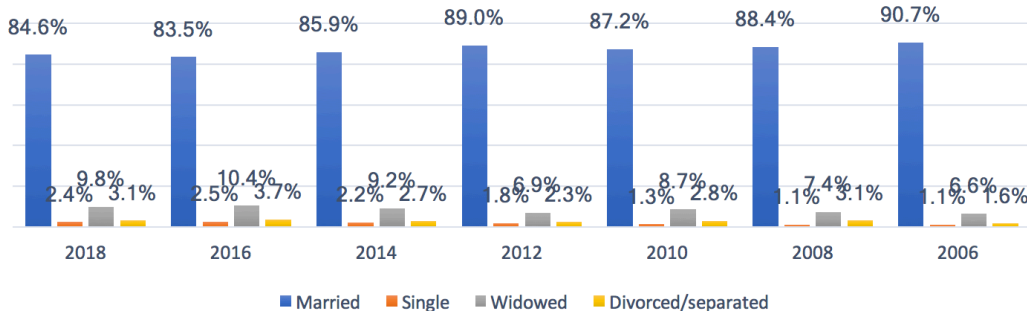


Figure 8. Marital status

Marital status

As in prior years, most Winter Texans are married as seen in Figure 8. The trends for the marital status of Winter Texans shows an increasing number who consider themselves either widowed or single. This finding is consistent with the finding that Winter Texans are increasingly older.



Figure 9 compares the marital status of this year's over 65-year-old Winter Texan respondents to that of the 65 and older U.S. population group. A far greater percentage of this year's Winter Texans are married compared to that of the general U.S. 65 years and older population. Correspondingly, fewer Winter Texans are single, widowed or divorced than the same age group in the U.S. overall.

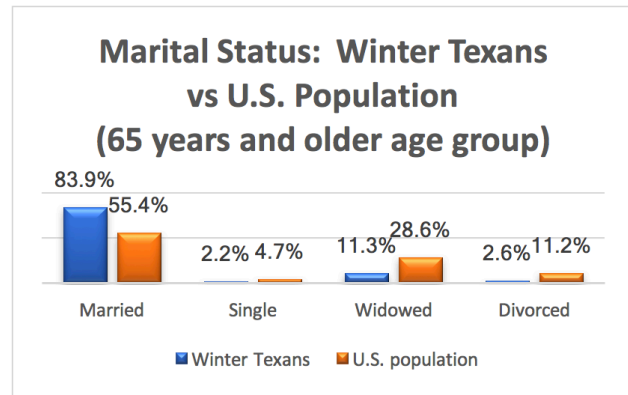


Figure 9. Marital status comparison

Similar to the finding that 12.2% of Winter Texan respondents in the 2018 survey are single or widowed, 12.1% report having only one person in their household. Most Winter Texans, 86.8%, have two people in their household and 1.1% report having a three-person or more household as shown in Figure 10.

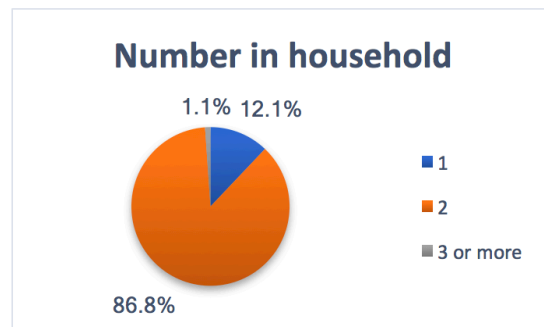


Figure 10. Number of people in Winter Texans' households

Education

Figure 11 shows that in 2018, an increasing number of Winter Texans responding to the survey attended college and fewer reported having no high school diploma. In total, 40.1% had some college and 32.8% reported having a bachelor's or higher degree.

In general, Winter Texans are more educated than their counterparts in the general U.S. population as shown in Figure 12. Only 1.5% of the over-65 Winter Texans do not have a high school diploma as compared to 22.1% of the general population. On the other hand, 37.9% of the Winter Texans had some college education as compared to 22.2% of the general over-65 population. Following a similar pattern, a greater number of the Winter Texans have bachelor's or higher degrees (33.1%) than do the general U.S. over-65 population (21.3%).

Education Level by Year

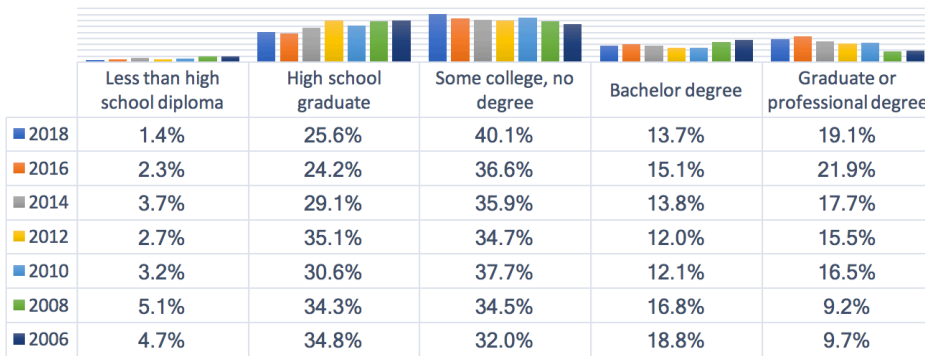


Figure 11. Education level

Education: Winter Texans vs U.S. Population (65 years and older age group)

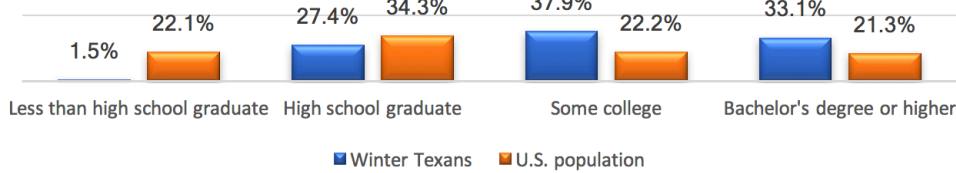


Figure 12. Education level comparison

Income

The average annual household income for Winter Texans participating in the 2018 study is about \$64,500. This income level represents a slight percentage decrease in nominal household income since 2016 but a 29.8% increase since 2006 as indicated in Figure 13.

The distribution of annual household income has changed since 2006. As seen in Figure 14, fewer 2018 Winter Texans reporting nominal income levels in the low range and more in the higher income range, although the income levels are slightly lower than in the last study. About 45.6% of 2018 Winter Texans were in the \$60,000 or higher income category whereas 48.4% of 2016 Winter Texans reported having a \$60,000 or higher income. Overall, the trend has been significantly upward.

Average Household Income

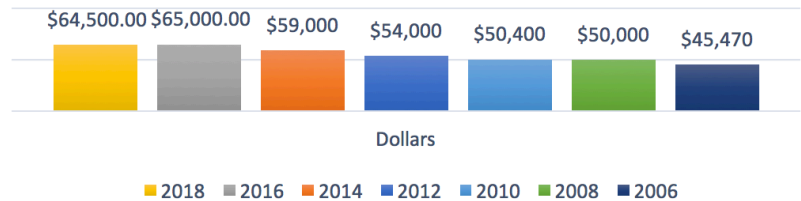


Figure 13. Annual household income

Annual Household Income by Year

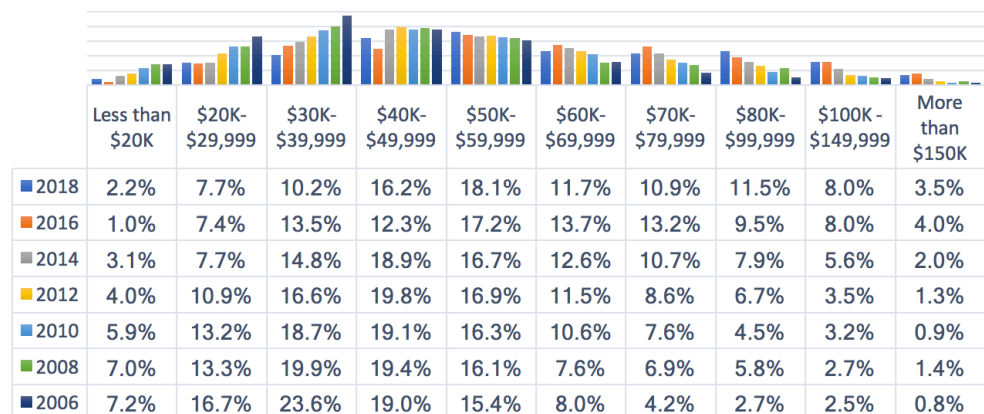


Figure 14. Income level

Figure 15 compares the income distribution of over 65-year-old Winter Texans to the 65 years and older age group nationally. A higher percentage of Winter Texans (78%) reported having incomes in the \$30,000 to \$100,000 range relative to their counterparts in the general population (44%). Proportionately, slightly more of the over-65 Winter Texans than U.S. over-65-year-olds report having a household income over \$100,000 (12.3% versus 11.0%). On the other hand, a much smaller percentage of Winter Texans report having an income of less than \$20,000 (1.8% for Winter Texans versus 29.4% nationwide).

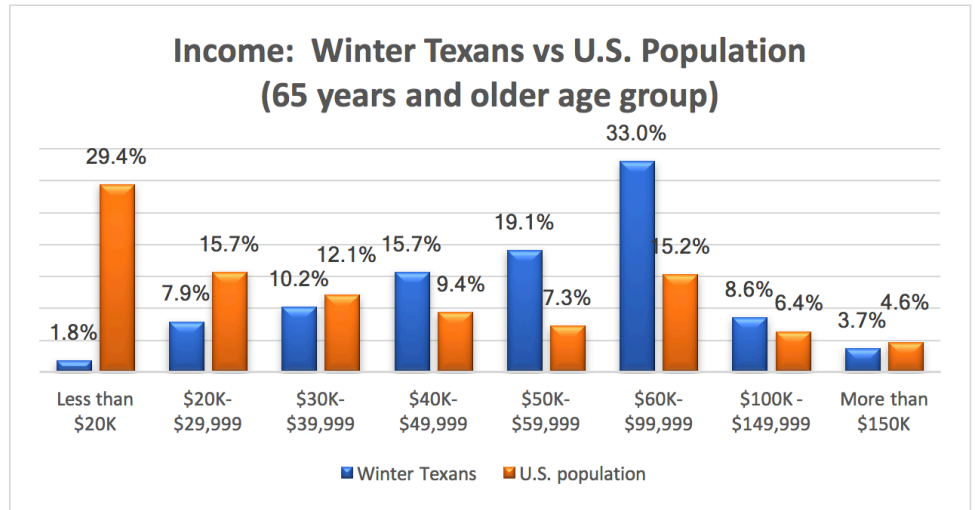


Figure 15. Household income comparison

Employment

The majority of Winter Texans (91.9%) are retired (see Figure 16) with only 3.3% of those retiring in the past year. The percentage of ‘newer’ retirees is the highest of the reporting period since the 2008 study. A total of 6.4% of respondents indicated working full-time or part-time.

The employment status of 65-and-older Winter Texans is compared to the employment status of the U.S. 65-year-olds and over population in Figure 17. The graph shows that a greater percentage of Winter Texans (93.6%) are retired or are not in the work force as compared to 84.0% of the general U.S. population of the same age group. No Winter Texans reported being unemployed whereas 1.3% of the general over-65 U.S. population reported being unemployed.

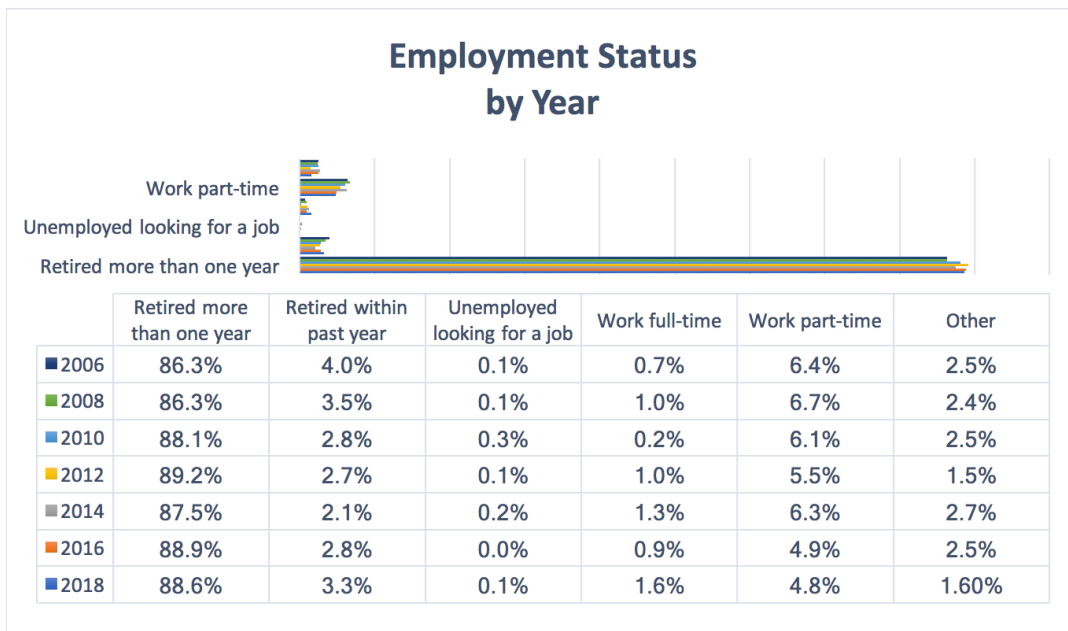


Figure 16. Employment status

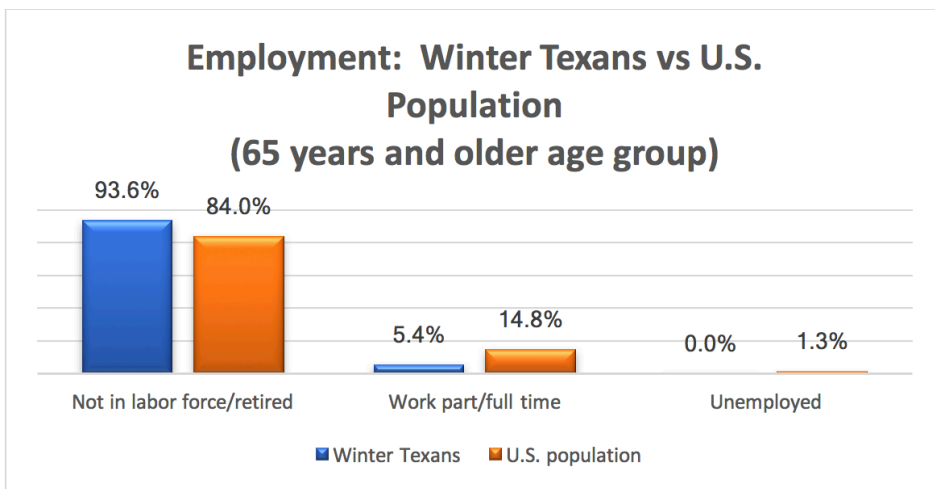


Figure 17. Employment status comparison



Home state

The top home states/country of Winter Texans are shown in Figure 18. In 2018, most Winter Texans came from states within the U.S. although 14.3% came from Canada. Of those Winter Texans from Canada, most are from Ontario (57.3%), followed by Manitoba (20.7%), Saskatchewan (8.5%) then Quebec (7.3%).

The state with the largest share of Winter Texans is Minnesota

(16.3%), followed by Iowa (9.7%), Wisconsin (8.8%) Illinois (7.7%), Missouri (5.7%), Michigan (6.8%) and Nebraska (3.0%). Respondents from all other states are grouped together into the “Other” category, which accounts for more than a quarter of this year’s total survey respondents. The proportion of Winter Texans by state appears fairly stable over time. However, in this year’s study, proportionately more Winter Texans are from Minnesota than in any other prior survey.

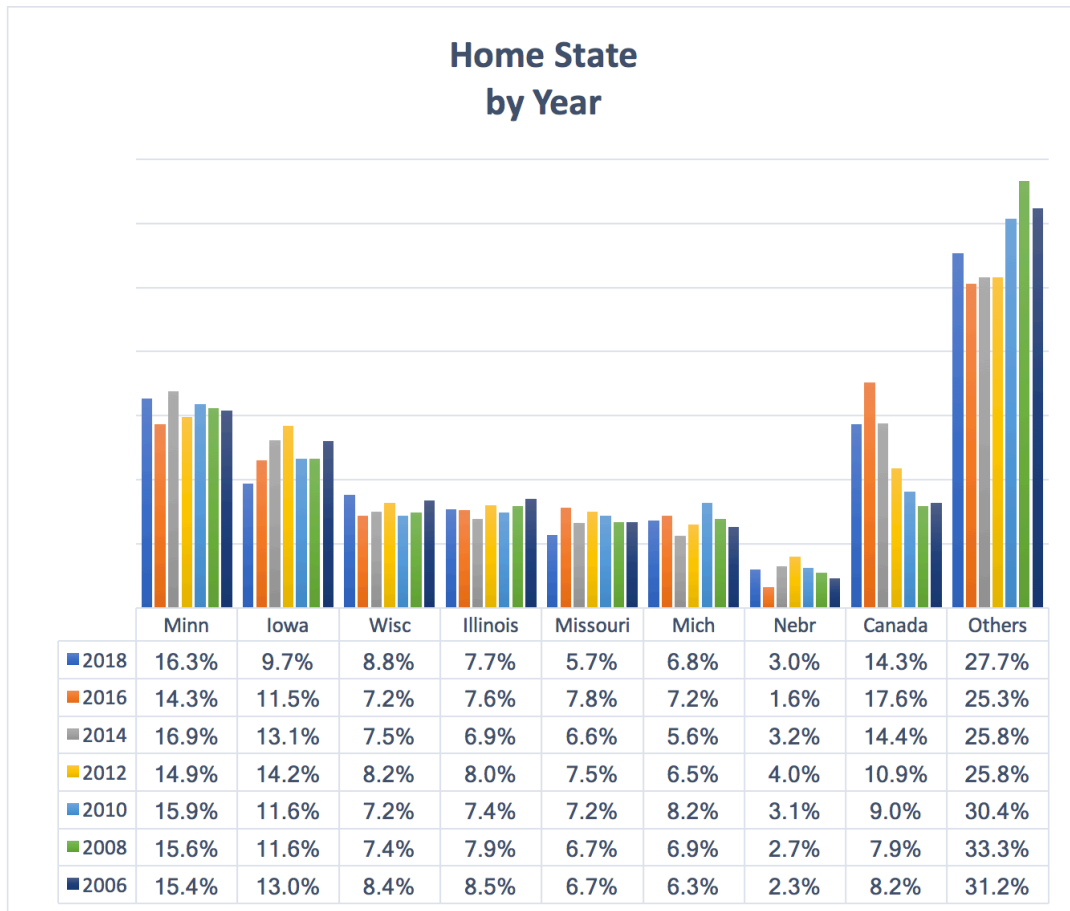


Figure 18. Home state

Results: Stay Characteristics



The primary purpose of the biennium Winter Texan studies is to determine the economic impact of Winter Texans on the Valley economy. An understanding of each component of Winter Texans' visits is needed to accomplish this goal. For example, factors such

as how long Winter Texans stay in the area, the types of housing they have while in the RGV and the types of activities as well as attractions they participate in while in the Valley all impact the region. This section details those Valley stay components.

Days spent in the Valley

Figure 19 shows that the average stay of the 2018 Winter Texans in the RGV is 133 days, the same as in most prior studies. The largest proportion of survey respondents reported staying 120 days (14.6%), 90 days (14.4%), 180 days (12.7%) and 150 days (12.3%). In all 78.7% of study respondents reported staying between three to six months as compared to 84.1% of the 2016 Winter Texans.

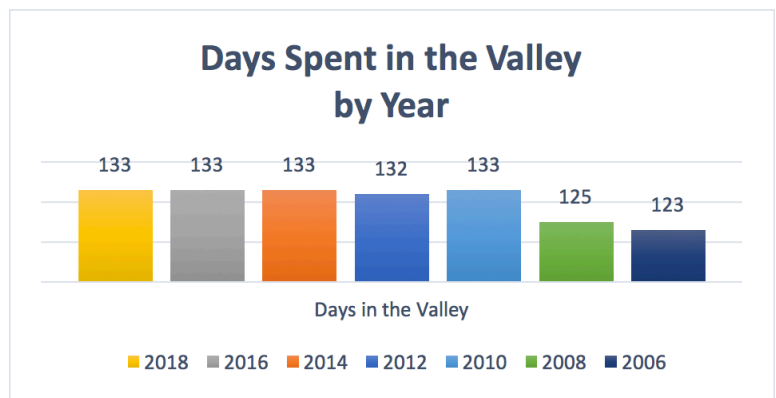


Figure 19. Days spent in the Valley

Years coming to the Valley

Including the current trip, this year's respondents indicated having come to the Valley an average of 11.3 years. As shown in Figure 20, this year's Winter Texans had come to the Valley for slightly fewer years than Winter Texans in the last study but more years than most other past studies.

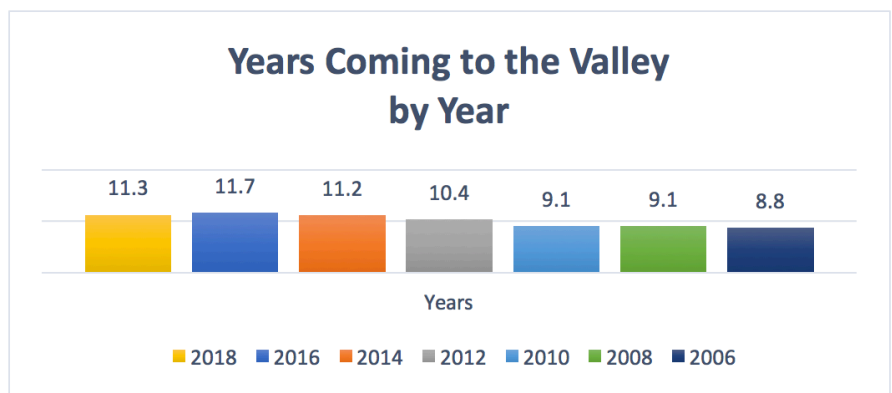


Figure 20. Years coming to the Valley

First time in the Valley

The number of first-time Winter Texans to the Valley is useful in understanding whether the Valley is able to attract new Winter Texans who might supplant Winter Texans who become too old to continue their annual trek to the Valley. This year, 5.4% of study respondents indicated that this was their first time in the RGV as seen in Figure 21. This percentage is well above the percentage of first-timers since 2010. A total of 52.9% of 2018 respondents reported coming to the RGV for 10 years or less, slightly less than the 53.9% reported in 2016.

Housing type

While in the Valley, the housing types most often used by Winter Texans are shown in Figure 22. As in prior years, most Winter Texans own a local place of residence. A total of 50.2% of Winter Texan respondents live in their own mobile home/park model while 32.2% live in their own recreational vehicle (RV) during their stay in the Valley. A total of 90.9% of all Winter Texan respondents live in RVs or mobile homes/parks—in RVs or in mobile homes or park models. The graph also shows that while more Winter Texans have increasingly owned their RGV residence—other than an RV—in 2018, slightly fewer Winter Texans (55.2%) owned their own RGV residence (house, condo or mobile home).

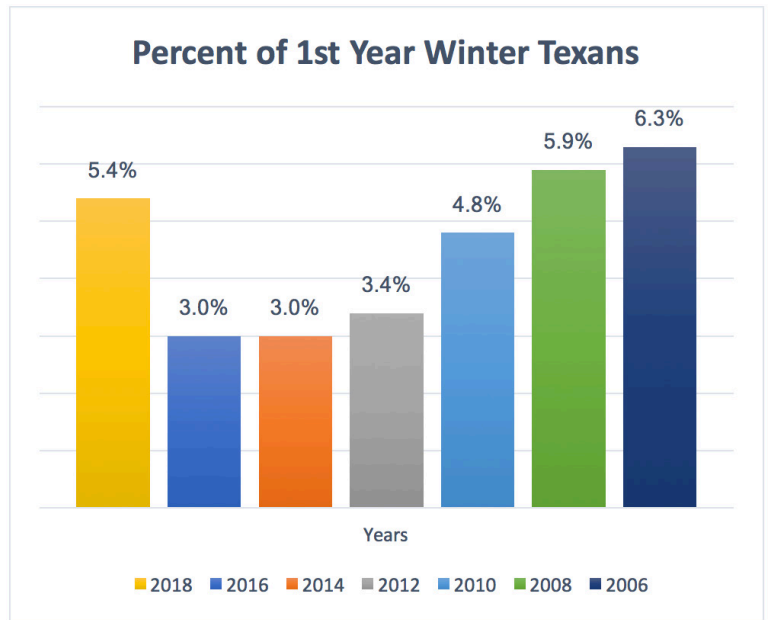


Figure 21. First-time Winter Texans

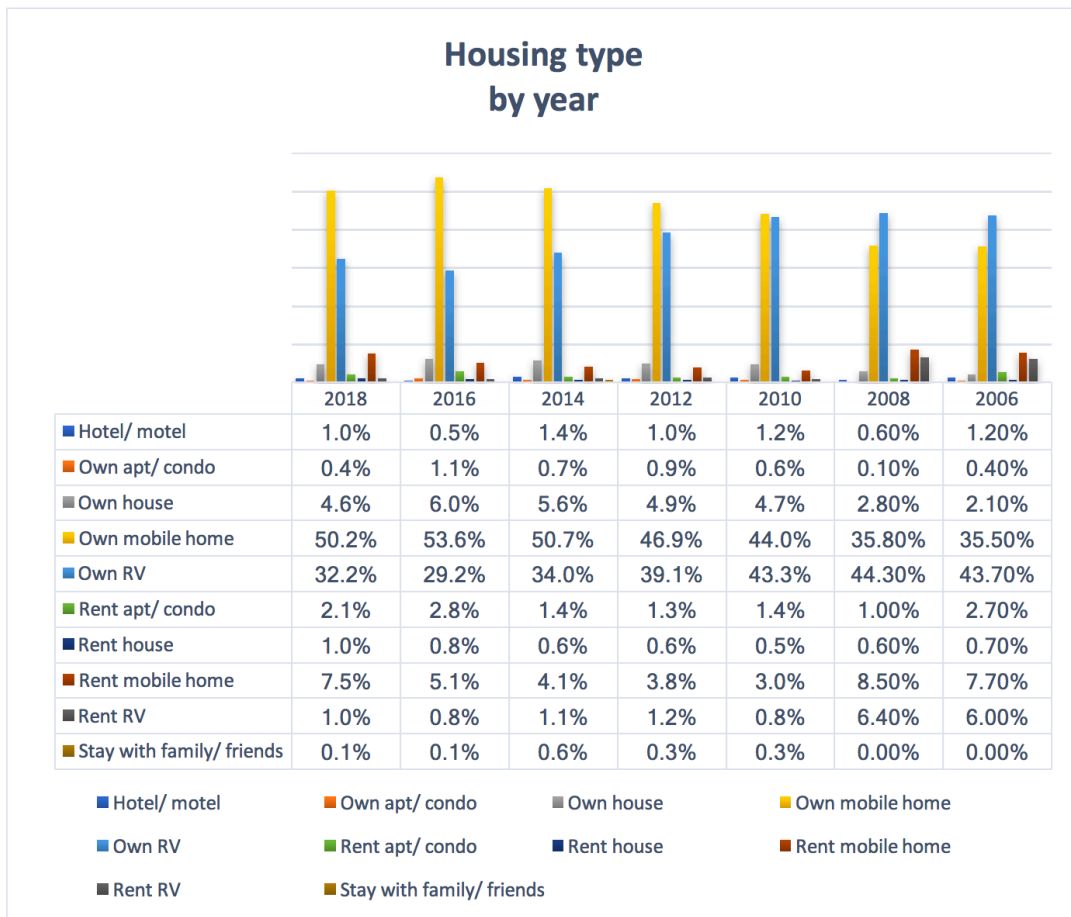


Figure 22. Housing type



Why visit the Valley

As in past years, the climate, cost of living, friendly people and social activities are primary reasons that Winter Texans come to the Valley each year, as seen in Figure 23. Also important to many Winter Texans are taking a winter vacation and visiting Mexico.

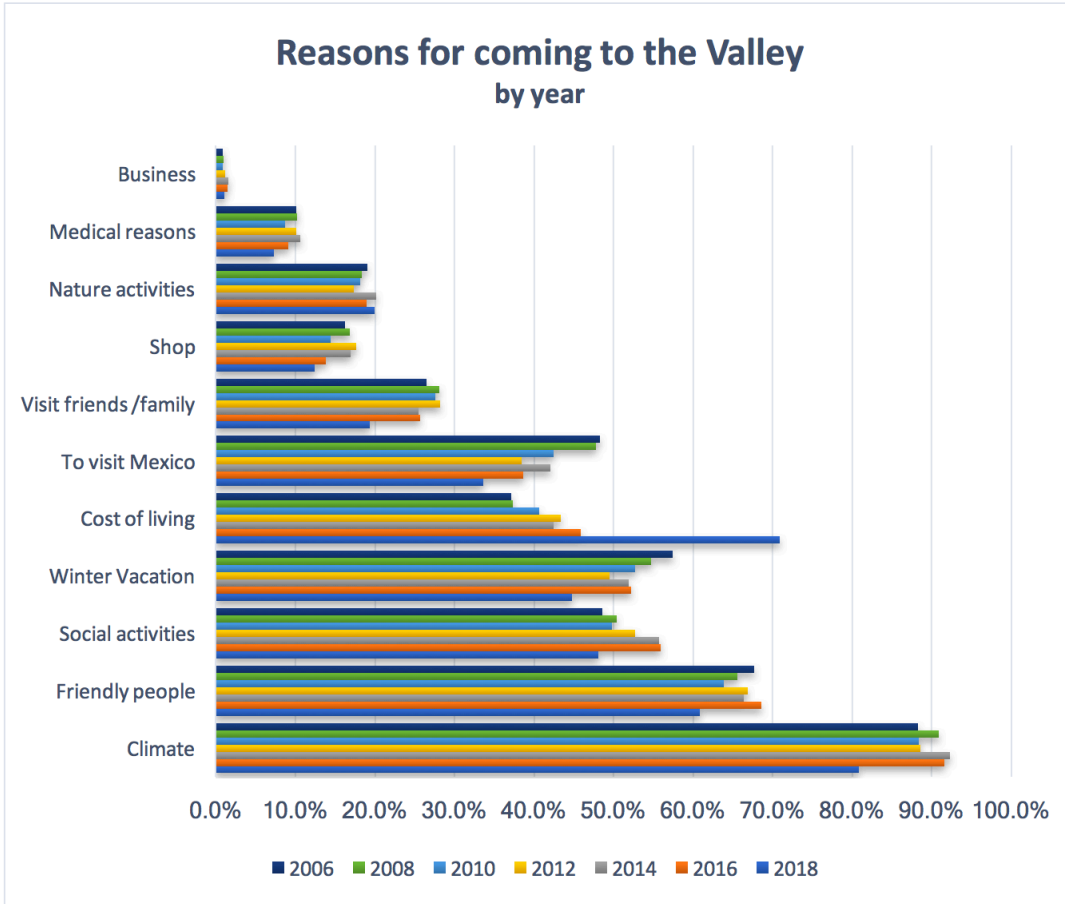


Figure 23. Reasons why Winter Texans come to the Valley

Activities

This year’s survey asked respondents how frequently they participated in various listed activities while in the RGV. As Table 1 shows, the activities that almost all Winter Texans participated in at least sometimes include visiting flea markets (97.1%), a historical site (90.1%), festivals (88.4%) and musical productions or jam sessions (87.8%), going to the beach (87.1%) and going to wildlife/nature refuges (83.9%). Exercising (79.7%), dancing (61%) and bicycling (53.1%) are other popular physical activities enjoyed by this year’s Winter Texans. Activities that Winter Texan respondents were least likely to participate in include softball (8.8%), golf (35.2%) and fishing (35.9%).

Table 1. Level of Participation in Selected Activities

Activity	Never	Rarely or sometimes	Often or a lot
Music/jams	12.2%	51.0%	36.8%
Flea markets	3.0%	63.7%	33.4%
Exercising	20.3%	48.3%	31.4%
Dancing	39.0%	35.9%	25.1%
Golf	64.8%	15.6%	19.6%
Volunteering	29.9%	47.4%	22.6%
Bicycling	47.0%	34.4%	18.7%
Festivals	11.5%	68.8%	19.6%
Crafting	38.5%	42.0%	19.5%
Sight-seeing in Mexico	24.2%	59.9%	15.9%
Beach	12.9%	70.6%	16.5%
Wildlife/nature refuges	16.1%	69.6%	14.3%
Historical sights	9.9%	77.0%	13.1%
Libraries	38.0%	48.3%	13.6%
Birding	44.5%	44.6%	10.9%
Museums	23.1%	70.7%	6.2%
Fishing	64.1%	30.6%	5.3%
Travel tours	35.2%	61.6%	3.2%
Softball	91.2%	6.5%	2.3%
Zoo	42.8%	54.0%	3.2%



Why not return

When asked, an overwhelming majority of 2018 Winter Texans (95.5%) plan to return to the Valley next year. If they could not return, however, the most likely reasons given were related to health (59.3%), family issues (28.5%), terrorism or threat of violence (20.3%) and increased costs in the Valley (17.5%) as depicted in Figure 24. Compared to Winter Texan responses

after the 2010 drug cartel violence in Mexico, Winter Texans are increasingly much less concerned about terrorism or threat of violence as a reason for not returning to the Valley. These findings suggest that concerns about Mexico violence or the 2014 surge of undocumented immigrants and security forces to the Valley is not pervasive. The concern of Winter Texans about not returning because of health and family is consistent with the trend that the Winter Texan population is aging.

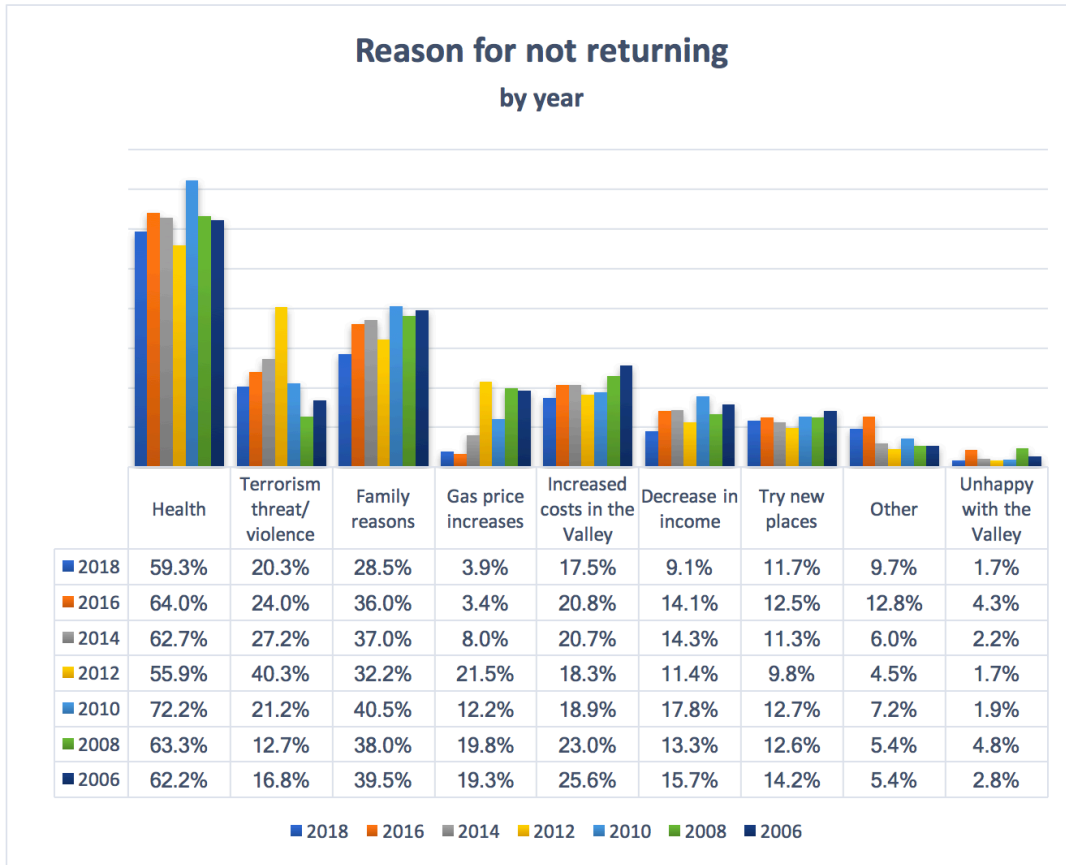


Figure 24. Reasons Winter Texans may not return to the Valley



Other winter destinations

This year’s study also asked respondents to indicate whether they had ever spent the winter at another winter destination and most had not (60.5%). Of the 39.5% who had wintered elsewhere, most had been to Florida (60.2%) although 24% had wintered in Arizona, 4.7% in other Texas resorts and 2.6% had wintered in California (See Figure 25).

Respondents were also asked why they left the prior destination to come to South Texas. The most often mentioned reasons were related to cost of living (29.9%), friendliness (24.7%), climate (14.6%), friends and family (9.8%), activities (8.4%), and geographic attractions such as the beach and Mexico (5.2%).

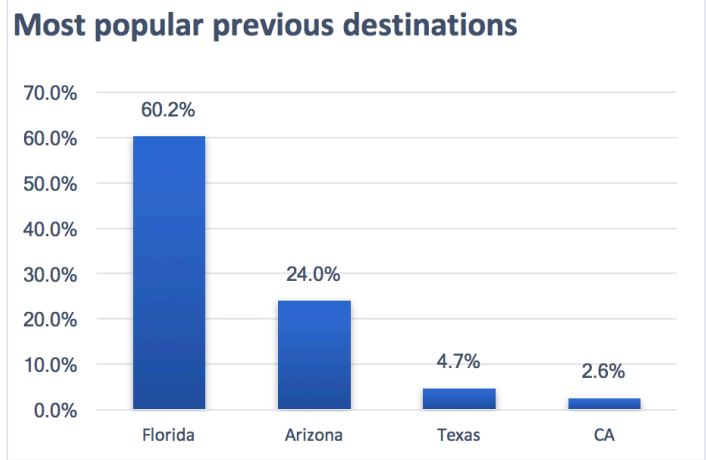


Figure 25. Popular other winter destinations

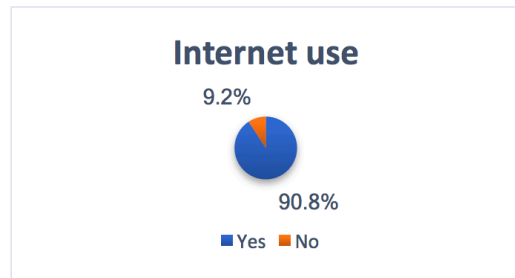


Figure 26. Use the internet

Results: Internet use

This year’s Winter Texan study asked respondents about internet usage, including time spent on the internet in various activities, use of internet for specific types of information, and the importance of specific internet activities. The results indicate that almost all Winter Texans (90.8%) use the internet while in the Valley as seen in Figure 26.

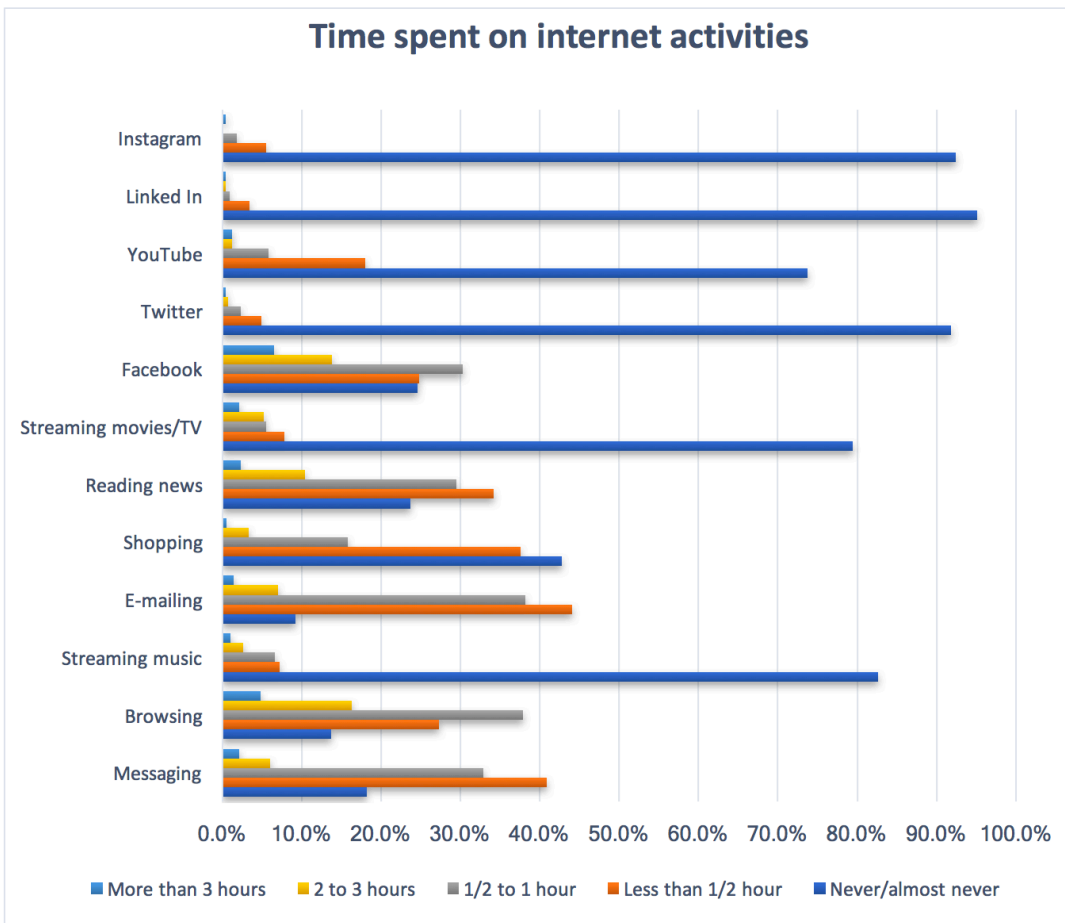
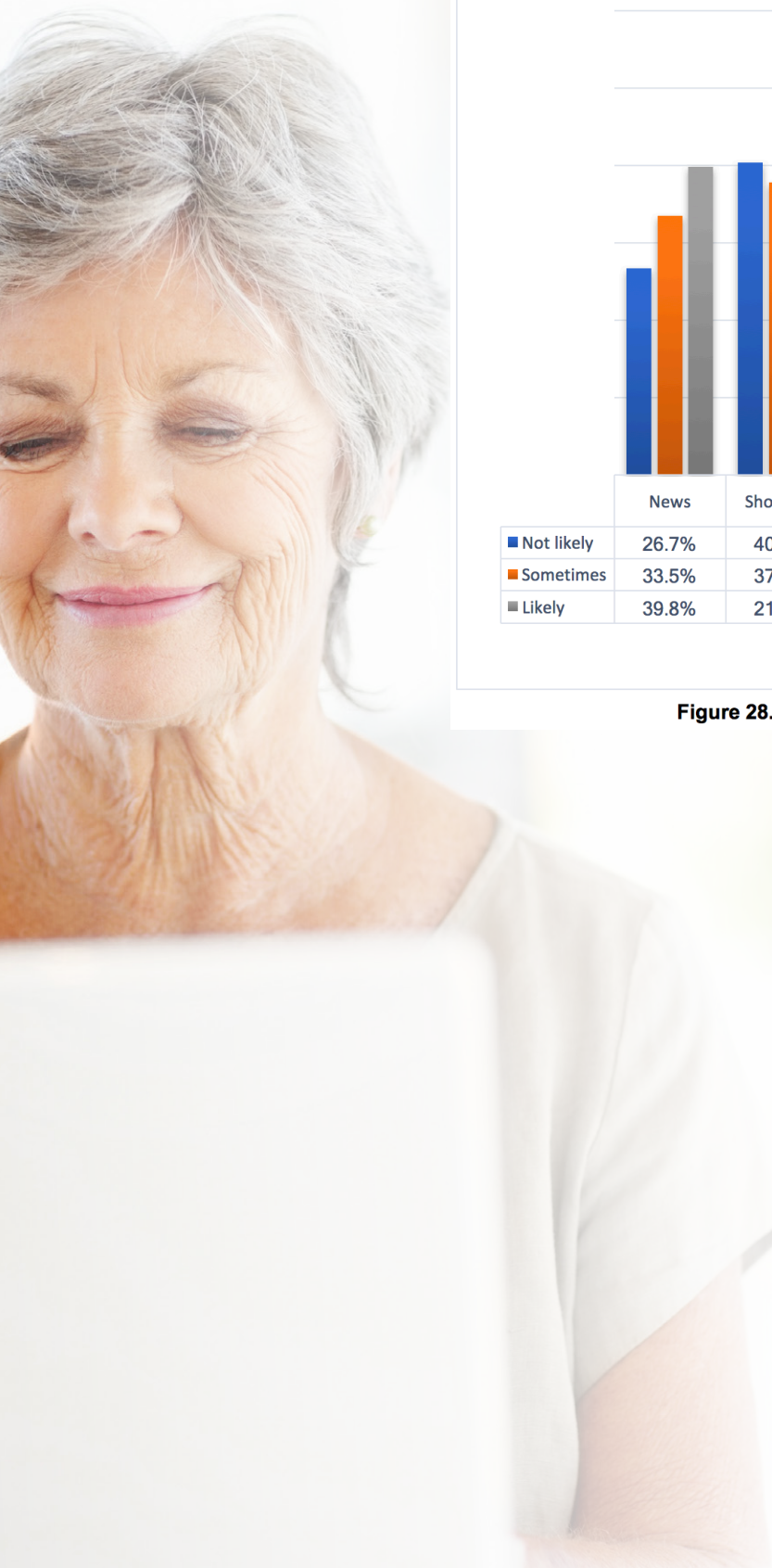


Figure 27. Allocation of time spent on internet sites

Figure 27 shows the time that Winter Texans spend on various activities on the internet. Internet-using Winter Texans are likely to spend at least some time each day emailing and messaging and on Facebook, although about one-fourth of respondents never Facebook. They are most likely to spend the most time—two or more hours—browsing the internet (21.1%), on Facebook (20.3%) and reading the news (12.7%). The study sample almost never uses LinkedIn (95%), Instagram (92%), or Twitter (91.8%) and most do not stream music (82.6%) or movies (79.4%) or YouTube (74%).



Types of information found on the internet

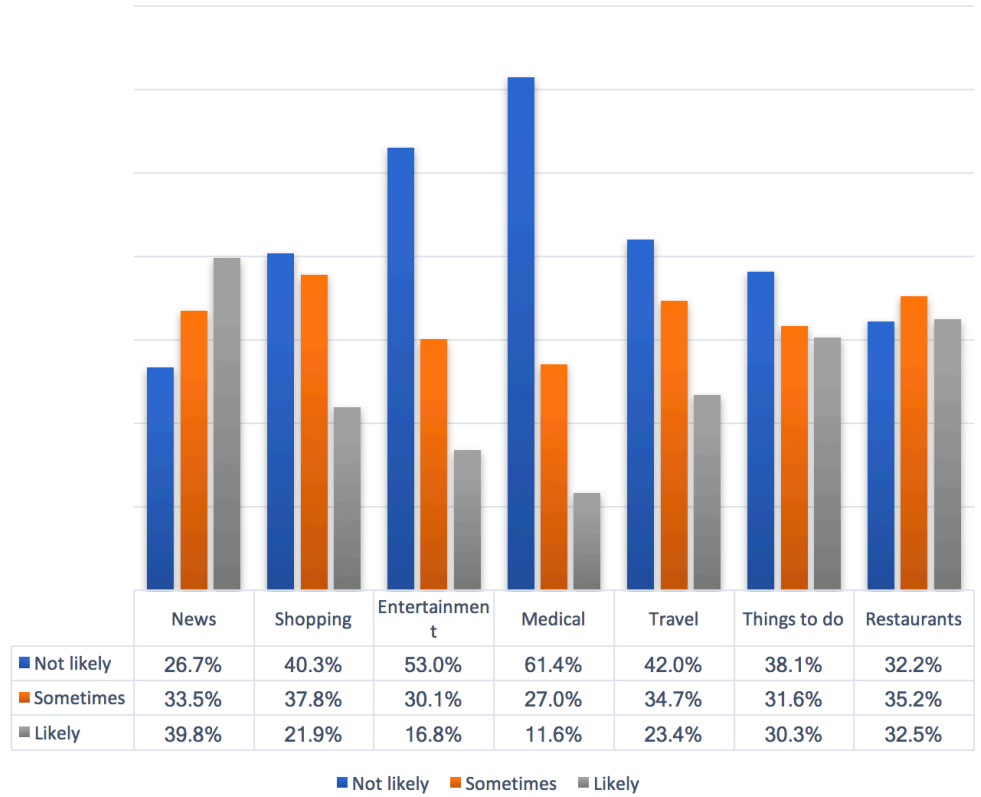


Figure 28. Types of information found on the internet

Figure 28 shows how likely Winter Texans are to use the internet for various specific types of information. For example, Winter Texans are most likely to use the internet for news, finding restaurants, things to do, shopping and for travel. They are least likely to use the internet to find medical-related information. Perhaps, for highly important information such as health care, Winter Texans are more likely to rely on word-of-mouth or other sources than on internet-provided information.

Finally, Winter Texans were asked to indicate how important various internet characteristics or activities are to them with results shown in Figure 29 (next page). The internet feature most important to the study sample is interacting with family and friends. Finding answers to questions, researching, learning and search engines were also important to the Winter Texans.

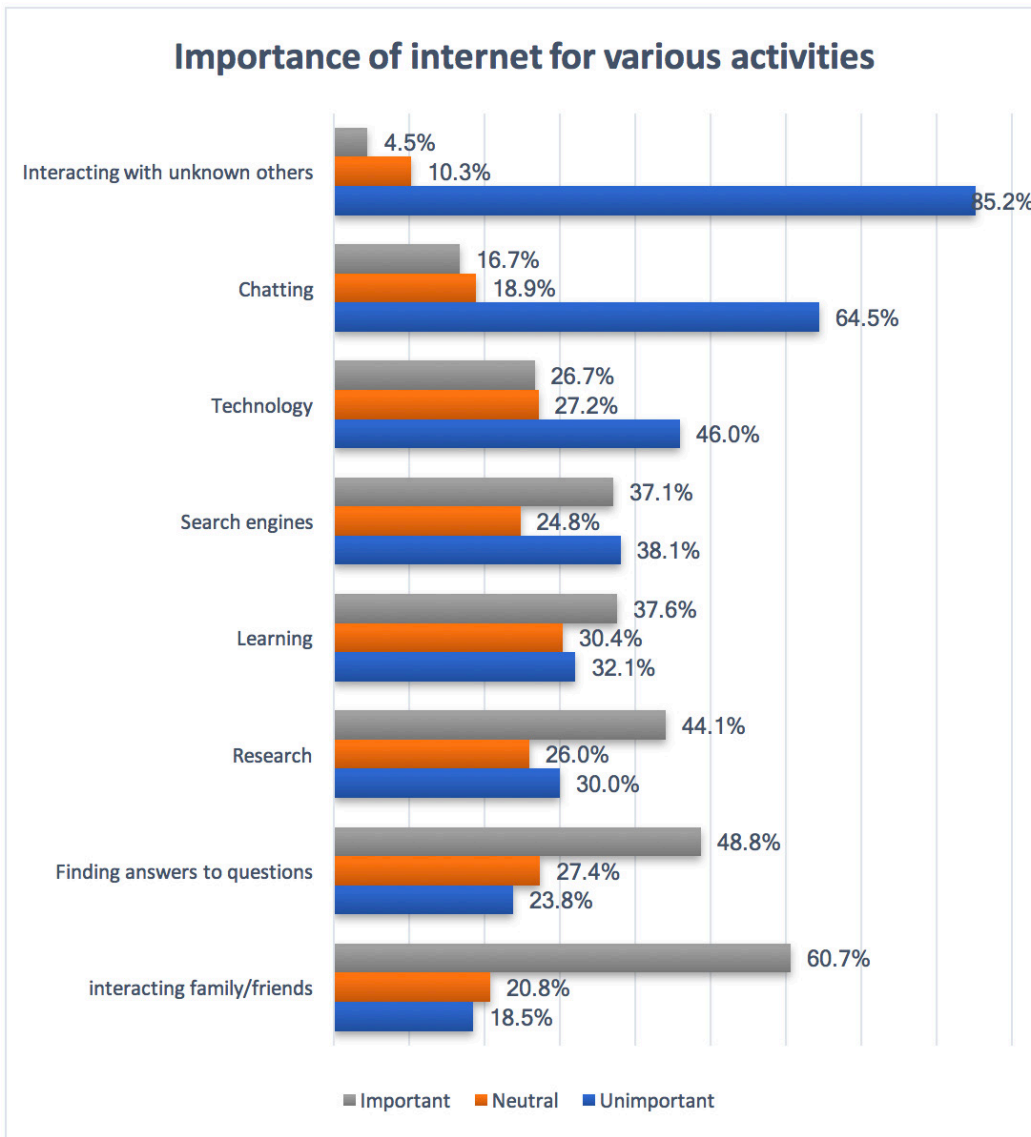


Figure 29. Importance of internet features

Results: Expenditure Patterns in Mexico

Most Winter Texans (85.3%) reported making one or more trips to Mexico while in the RGV this winter and the average number of trips was 5.1 as shown in Figure 30. The figure also shows Winter Texan visits to Mexico border towns since 2006. Both the number of Winter Texans visiting Mexico border towns and the number of trips taken have declined since 2006, reaching a low in 2012, which corresponds to the heightened drug violence in Mexico beginning in spring of 2010. This year’s study’s respondent visits to Mexico were slightly below those of 2016.



Figure 30. Winter Texan travel to Mexico border towns

Winter Texan spending in Mexico border towns is estimated in two ways. First, respondents were asked to indicate how much money they spent per trip to Mexico, on average. A total of 82.7% of the 2018 study Winter Texans reported their Mexico spending at an average of \$104 per trip to a Mexico border town, up from an average of \$92 per trip in 2016. Second, respondents were asked to estimate how much they spent in Mexico, on an average trip, in one of seven different spending categories. Using this method, Winter Texans reported spending an average of \$151 per trip to Mexico as shown in Table 2. The difference between the two spending methods is likely attributable to large purchases made during one trip that are not made during other trips. For example, a respondent reported spending an average of \$25 on each trip to Mexico but indicated spending \$2,000 on dental expenses per trip.

Table 2 shows reported spending in Mexico by spending category since 2012. As shown, Winter Texans' average nominal spending in Mexico in 2018 was less than all prior years. Most Winter Texans spent money on shopping (68.1% spent an average of \$34), on dining (63.2% spent an average of \$25) but more money was spent on dentists (33.3% spent an average of \$237) and on prescriptions (42.2% spent an average of \$54).

The total, direct spending of Winter Texans in Mexico border towns is calculated by multiplying the average expenditure per trip times the total number of trips. The estimated spending of each Winter Texan household in Mexico ranges from \$530 (\$104/trip x 5.1 trips) to \$796 (\$151 x 5.1 trips) per household, with a midpoint of \$663, slightly below the last study's reported spending of \$694 per household. If the total number of Winter Texan households in the Valley is 56,700 and 85.3% visited Mexico and spent an average of \$663, then the estimated direct economic impact of **Winter Texans in Mexico during 2017-2018 is more than \$32 million**, with the range of direct spending from \$26 million to \$37.5 million.

Table 2. Average Spending in Mexico Border Towns

	Percent making a purchase	Average \$ purchase	2018 Weighted spending	Percent making a purchase	Average \$ purchase	2016 Weighted spending
Shopping	68.15%	\$33.65	\$22.93	74.50%	\$35.73	\$26.61
Dining	63.17%	\$25.19	\$15.91	66.80%	\$26.97	\$18.02
Prescriptions	42.20%	\$54.83	\$23.14	51.60%	\$91.58	\$47.23
Dental	33.33%	\$237.07	\$79.02	38.10%	\$226.75	\$86.29
Sightseeing	4.30%	\$57.78	\$2.49	4.20%	\$43.90	\$1.85
Doctor	1.21%	\$482.78	\$5.84	0.90%	\$116.25	\$1.01
Other	6.32%	\$20.00	\$1.26	11.50%	\$56.18	\$6.44
Total weighted average spending			\$150.60			\$187.44
	Percent making a purchase	Average \$ purchase	2014 Weighted spending	Percent making a purchase	Average \$ purchase	2012 Weighted spending
Shopping	75.80%	\$38.74	\$29.36	74.30%	\$37.96	\$28.20
Dining	68.20%	\$25.86	\$17.64	64.50%	\$27.76	\$17.91
Prescriptions	49.50%	\$64.07	\$31.71	49.40%	\$80.62	\$39.83
Dental	40.90%	\$197.08	\$80.61	37.80%	\$185.41	\$70.08
Sightseeing	3.10%	\$37.91	\$1.18	3.40%	\$61.35	\$2.09
Doctor	1.40%	\$179.90	\$2.52	1.80%	\$123.89	\$2.23
Other	9.50%	\$75.43	\$7.17	8.80%	\$49.78	\$4.38
Total weighted average spending			\$170.18			\$164.72

**Results:
Expenditure
Patterns in the
Rio Grande Valley**

While in the Valley, Winter Texans spent money on both routine, monthly purchases, such as groceries and housing, and on one-time major expenditures, such as furniture and appliances. Graphs comparing nominal monthly expenditures and one-time purchases from 2006 to 2018 are provided in Figures 31 and 32. Figure 31 shows that for monthly purchases, 2018 Winter Texans, on average, spent much less in nominal dollars than in prior years in all spending categories examined since at least 2012, and in some cases since 2006.

Because these spending results were so dramatically different from past years, an analysis was conducted based on entry type to determine if online, expo or hard copy respondents had differing

**Monthly Expenditures
by Category and Year**

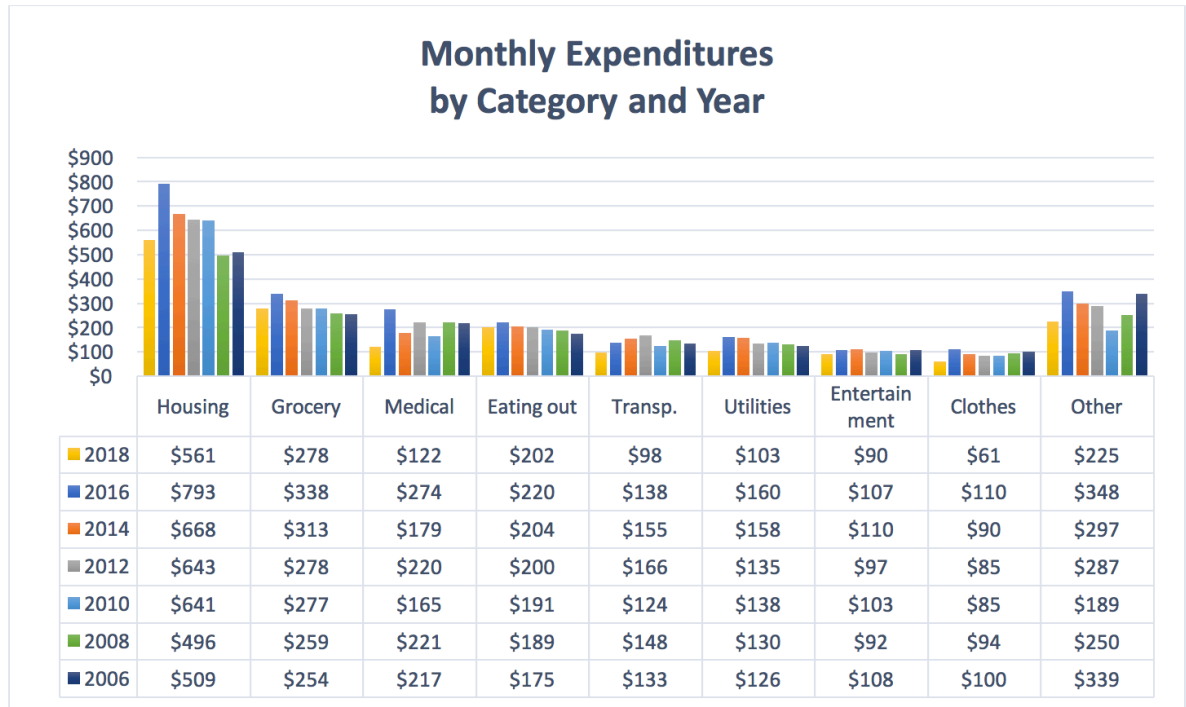


Figure 31. Average monthly expenditures by spending category

responses but no significant differences in response type was found. This finding may be explained in a number of ways. First, as with all survey research, Winter Texan respondents this year may not have remembered amounts spent correctly or they may not have answered spending questions correctly. Second conditions may be different in this study. More respondents may own their own housing and did not include other costs of housing such as

insurance or taxes in their expenditure reporting. This year's Winter Texans may be more frugal with their spending by, for example, eating out less and traveling less. Also, this year's study respondents may be different from those in the past or even different from all other Winter Texans.

The 2018 Winter Texans also spent less money this year on major, one-time purchases while in the Valley than in any other season in the study. Figure 32 shows the weighted average spending by category as weighted by the percentage of Winter Texans making purchases in

**Weighted Average of Spending on Major Purchases
by Category and Year**

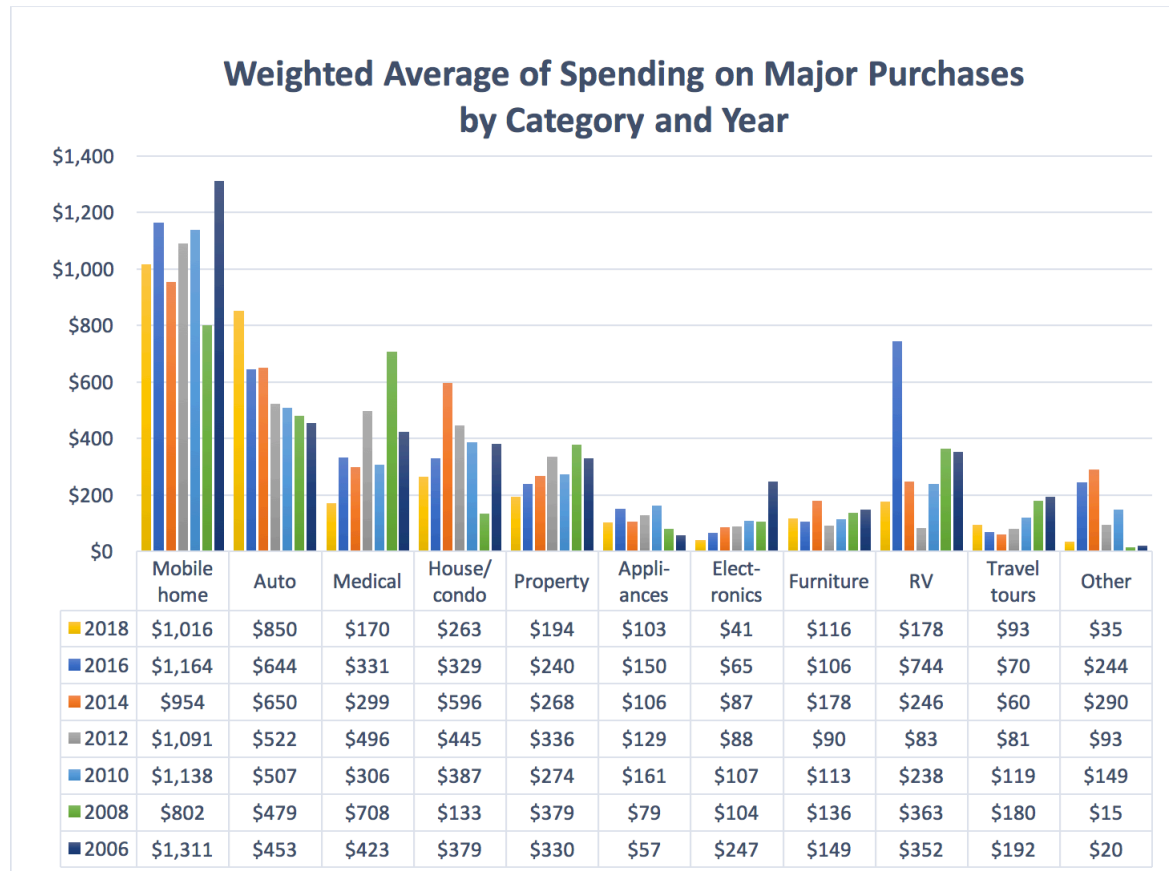


Figure 32. Weighted average spending on major purchases

the category. They spent more only on automobiles and travel tours than on purchases last year. This year's Winter Texans spend significantly less on medical, house/condo, property, appliances, electronics, RVs and miscellaneous purchases than reported in the last study.

The estimated average expenditures of Winter Texan households by category are shown in Table 3, first by monthly spending

categories then by major purchase categories. Taken together, 2017-2018 Winter Texans spent \$9,314 while in the Valley as seen in the table and in Figure 33. The table shows that Winter Texans spent far less on both routine monthly purchases and one-time purchases this season as compared to prior seasons—a nominal percentage decline of 37% over 2016 spending and a 3% decline over spending in 2008.

Table 3. Winter Texan Household Spending in the Valley by Expenditure Category for 2008-2018¹

Category	2016	2018 Weights	2016	2014	2012	2010	2008	2018	2016	2014	2012	2010	2008
Groceries	\$278	1	\$338	\$313	\$271	\$277	\$259	\$1,229	\$1,463	\$1,387	\$1,190	\$1,229	\$1,076
Eating out	\$202	1	\$220	\$204	\$196	\$191	\$189	\$892	\$954	\$906	\$863	\$845	\$782
Housing	\$561	1	\$793	\$668	\$653	\$641	\$496	\$2,481	\$3,433	\$2,961	\$2,873	\$2,840	\$2,059
Utilities	\$103	1	\$160	\$158	\$134	\$138	\$130	\$456	\$693	\$701	\$591	\$610	\$541
Transportation	\$98	1	\$138	\$155	\$161	\$124	\$148	\$433	\$597	\$688	\$710	\$551	\$613
Entertainment	\$90	0.83	\$84	\$86	\$79	\$60	\$72	\$330	\$465	\$488	\$348	\$366	\$300
Clothing	\$61	0.63	\$75	\$61	\$62	\$34	\$70	\$171	\$478	\$400	\$273	\$265	\$291
Medical	\$122	0.31	\$85	\$54	\$75	\$83	\$87	\$169	\$1,185	\$791	\$331	\$345	\$360
Other	\$225	0.10	\$45	\$37	\$46	\$78	\$37	\$96	\$1,509	\$1,317	\$203	\$149	\$154
Average monthly spending/household			\$1,938	\$1,739	\$1,677	\$1,625	\$1,488	\$6,257	\$10,775	\$9,639	\$7,383	\$7,198	\$6,177
Major Purchases:													
Electronics	\$245	0.17						\$41	\$65	\$87	\$88	\$107	\$104
Automobile	\$5,535	0.15						\$850	\$644	\$650	\$522	\$507	\$479
Appliances	\$558	0.18						\$103	\$150	\$106	\$129	\$161	\$79
Medical	\$1,076	0.16						\$170	\$331	\$299	\$496	\$306	\$708
Travel tours	\$610	0.15						\$93	\$70	\$60	\$81	\$119	\$180
Furniture	\$858	0.14						\$116	\$106	\$178	\$90	\$113	\$136
Mobile home	\$6,312	0.16						\$1,016	\$1,164	\$954	\$1,091	\$1,138	\$802
Property	\$2,288	0.08						\$194	\$240	\$268	\$336	\$274	\$379
RV	\$2,432	0.07						\$178	\$744	\$246	\$83	\$238	\$363
House/condo	\$8,013	0.03						\$263	\$329	\$596	\$445	\$387	\$133
Other	\$1,362	0.03						\$35	\$244	\$290	\$93	\$149	\$15
Average one-time purchases/household								\$3,058	\$4,088	\$3,733	\$3,454	\$3,501	\$3,378
Total spending per household during stay on all items								\$9,314	\$14,863	\$13,372	\$10,837	\$10,699	\$9,555

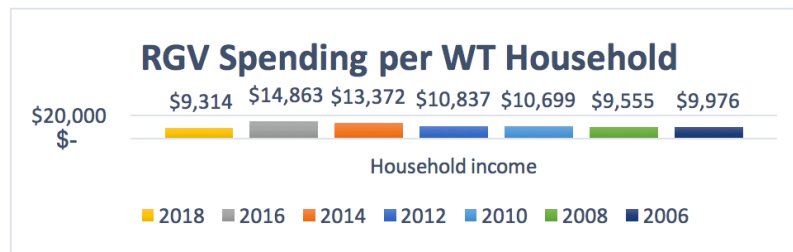


Figure 33. RGV spending



The 2016 Park Study

Introduction

To estimate the total number of Winter Texans who stayed in the Valley during the year, survey questionnaires were mailed or faxed to local recreational vehicle (RV) and mobile home (MH) parks. The results from this survey and those from the survey of Winter Texans are used to estimate the total number of Winter Texans in the Valley during 2017-2018 as well as the direct economic impact that the Winter Texans have on the region.

Estimating the number of Winter Texans in the Valley is extremely difficult for a number of reasons. First, many Winter Texans own their own residence as shown previously in this study and time actually spent at an owned residence is difficult, if not impossible, to determine. These residents come and go without any way of tracking their presence. Second, many RV and MH parks do not track the numbers and turnover of Winter Texans in their parks. The park may not know if a particular visitor is a Winter Texan or a transitory tourist. Third, some parks likely track occupancy of sites but not necessarily turnover with respect to different Winter Texans. Additionally, the parks have no real way of keeping track of Winter Texans when the visitors own their own mobile home/park model in the park. Fifth, many parks do not participate in the study, perhaps skewing the results. Finally, an accurate tally of the population of parks—the number of parks and sites in the park—is a critical component of the estimation process but is virtually impossible to confirm. For example, parks may change from +55 parks to residential or different respondents from the same park reply with differing Winter Texan numbers. Despite these challenges, information from a directory of parks and from the park respondents willing to provide information about their experiences with Winter Texans allows an estimate of the number of Winter Texans in the Valley during the winter season, bearing in mind the flaws with obtaining the estimate.

Park Study Methodology

A questionnaire designed to determine the number of Winter Texans staying in mobile home and RV parks was developed based on the questionnaire used in prior Winter Texan studies. The questionnaire, shown in Appendix C, asked park manager/owners to indicate how many RV and mobile home/park model sites are in their park, how many of the sites are owned by Winter Texans, how many were rented by Winter Texans and what percent of the park was occupied by Winter Texans during the peak time of the season. Park owners/managers were also asked to estimate how many total Winter Texan households were in their park during the season and if this number was more or less than the number of Winter Texans last year, two years ago and more or less than five years ago. Finally, park owners/managers were asked to indicate what changes or trends they experienced with Winter Texans this year.

All Rio Grande Valley Mobile Home and RV parks are listed in the *Park Directory 2017-2018 Edition* published by the *Winter Texan Times* and available at wintertexantimes.net. The parks listed in the Directory with working fax numbers were sent a questionnaire. Respondents were asked to fax, email or mail the questionnaire to the Business and Tourism Research Center.

Results: Park Population

The Rio Grande Valley Mobile Home & RV Park Directory 2017-2018 Edition (Park Directory) lists 279 RV/mobile home parks and subdivisions in the Rio Grande Valley region specifically for Winter Texans. The Directory shows that 232 parks have a total of 33,182 RV sites with the number of sites ranging from 2 to 1,269 RV for an average of 143 RV sites per park. The Directory lists 211 parks as having a total of 24,312 MH sites with

the number of sites ranging from 2 to 700 with an average of 115 MH sites per park. Taken together, the Directory reports a total of 57,494 RV and MH sites with an average of 206 sites per park. RV sites represent 57.7% of all sites in Valley parks while 42.3% of sites are MH sites as shown in Figure 34.

Results: Park Survey

Questionnaires were faxed or emailed to more than 200 of the RV and MH parks with fax numbers as listed in the Park Directory. Quite a number of fax numbers did not respond so many parks were contacted by phone to ask for participation by fax, over the phone or by completing the same survey online. Eventually, 63 surveys were returned and considered useable in the park study (22.5% response rate).

Some questionnaires, however, were incomplete or the data provided was incorrect. For example, the respondent may have reported having 100 Winter Texan-owned mobile homes/park models but then indicated that only 40 Winter Texans households (WT HHs) were in the park this year. Accordingly, adjustments were made to reflect likely total WT HHs where appropriate.

Of the 63 responding parks, 59 reported having a total of 10,316 RV sites and 45 reported having 9071 MH sites. Of all parks sites reported, 53.2% are RV sites while 46.8% are MH sites as seen in Figure 35. The average number of RV sites for all reporting parks is 175 per park and the average number of MH sites is 202 (see Figure 35) for an average of 307 total sites per park. The proportion breakdown and number of RV sites and MH sites in all Valley parks as reported in the park survey is somewhat different from results reported in the Park Directory. Surveyed parks have more sites on average than parks in the Park Directory and a greater proportion of MH sites. Most likely, the smaller parks did not participate in this year’s study.

Park site ownership

Park survey participants were asked to indicate how many RV sites and MH sites were owned by Winter Texans and how many were rented by Winter Texans during the season. A total of 25 parks reported having 1,783 (17.3% of all RV sites) owned by Winter Texans and 31 parks reported having 4,553 (50.2% of all MH sites) owned by Winter Texans. As for renting, 51 parks reported renting 5,379 RV sites (52.1% of all RV sites) to Winter Texans and 43 parks reported renting 3,725 MH sites (41.1% of total MH sites) to Winter Texans. The percentage of Winter Texans renting versus owning is higher this year than

Percent of Park Sites Owned and Rented by Winter Texans

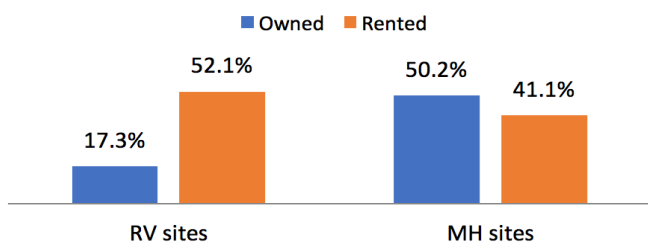


Figure 36. Percent of park sites owned and rented by Winter Texans

Directory: % Distribution and Average Number of RV and Mobile Home Sites per Park

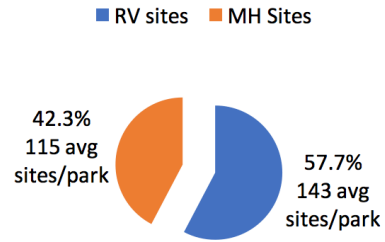


Figure 34. Directory: RV and mobile home sites per park

Park Survey: Percentage Distribution and Average Number of RV and Mobile Home Sites per Park

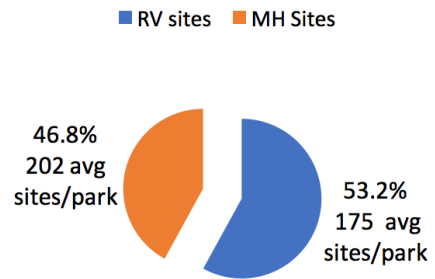


Figure 35. Park survey: RV and MH sites/park

last. This year’s results are shown in in Figure 36.

Winter Texans in Parks

The park survey asks for the percent of all RV and MH spaces occupied by Winter Texans at the peak time of the year and for the total number of different WT HHs in the park this year. In this year’s survey, parks reported an average RV occupancy rate of 64.5% and MH occupancy rate of 79.5%. Applying the average of these percentages times the total number of sites as reported in the Park Directory, suggests that a total of 40,736 WT HHs were in parks this year. Another way of estimating the WT HHs in parks is to take the survey results of actual Winter Texan renters and owners of RV and MH sites then calculate the occupancy rates accordingly. This method indicated higher occupancy rates than reported—69.4% for RV sites and 91.3% for MH sites or an average of 79.6% occupancy rate—suggesting a total of 45,224 WT HHs in parks.

Finally, 40 parks reported a total number of 7,966 WT HHs in their park this year for an average of 199 per park. A number of parks reported the number of WTs owning and renting sites but did not report occupancy rates. So, as a check on the use of the occupancy rates reporting method for calculating WT HHS in parks, the 56 parks reporting the number

of different WT HHs in RV and MH sites were added together. The total indicated 15,440 WT HHs in the reporting parks for an average of 276 WT HHs per park. Taking the average between the two extremes (237) WT HHS per park) and multiplying it times the number of parks in the Valley (279), yields an estimate of about 66,244 WT HHs in all parks.

Change in park occupancy

In the first section of the park survey, parks were asked to report how many different WT HHs rented an RV or MH site this year and last year. A total of 41 park survey respondents reported a net change in Winter Texan RV occupancy in this year versus last year as 921 more WT HHs. A total of 36 parks reporting having a net increase of 821 WT HHs in MH sites this year than last year. One very large park reported having significant increases in WT HHs so was eliminated from further analysis as an outlier to avoid over estimating the number of WT HHs.

In the second section of the survey, respondents were asked to indicate how many total WT HHs were in their park this year, how many more, less or the same as last year, two years ago and five years ago. As shown in Figure 37, 19 parks reporting having an average of 29 more WT HHs this year than last, 13 reported having about 13 fewer WT HHs this year and 18 had about the same number. This resulted in a net average change of 16 more WT HHs per park this year or about 4,447 more WT HHs living in parks. As compared to two years ago, 20 parks reported having an average of 45 more WT HHs this year, 10 reported

having 17 fewer WT HHs this year and 13 had the same number of WT HHs. The net change is an average of almost 29 WT HHs per park or 8,000 more total WT HHs living in parks this year than two years ago. Finally, as compared to five years ago, 18 parks reporting having an average of 35 more WT HHs per park, 10 parks reporting having 49 fewer WT HHs and 11 reported no change; a net average change of 14 fewer WT HHs per park or

Average change in park occupancy per park

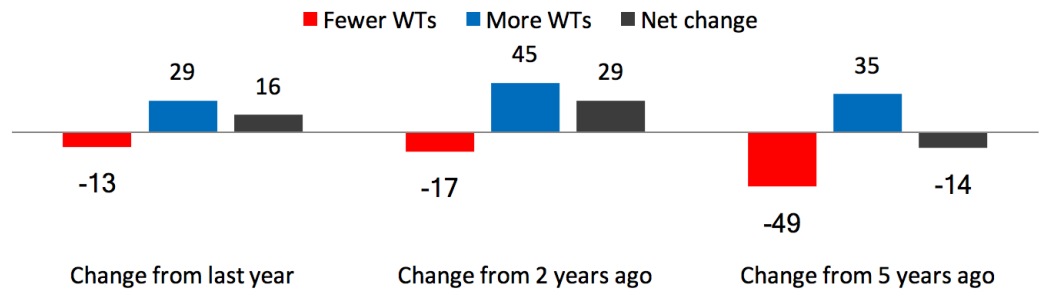


Figure 37. Changes in the number of Winter Texans in parks

3,934 fewer WT HHs in parks this year than five years ago.

In summary, park survey respondents reported having almost 4,450 more WT HHs in all during the 2018-17 season than in the previous year; had about 8,000 more than two seasons ago when the last Winter Texan survey was completed but 3,934 fewer than five years ago. In general, these study findings suggest that the number of Winter Texans has increased in the last few years but is not at the level it was five years ago. The increase in the number of Winter Texans in RV/MH parks over the last few years is substantiated by a number of comments about trends made by park owner/managers. A listing of all park owner/manager comments about Winter Texan trends is provided in Appendix D.



Results: Estimating the Number of Winter Texans in the Valley

An estimate of the number of Winter Texans in the Valley during the 2017-2018 season is determined by combining results of the park survey with the results of the Winter Texan survey. The estimate should be considered with a wide margin of error because the estimate depends on a number of assumptions as follows:

- 87% of Winter Texans households have two people (from the WT Survey);
- 90.9% of Winter Texans stay in RV/MH parks (from the WT Survey results);
- Average number of Winter Texans in parks from the Park Survey is 237;
- Average Winter Texan park occupancy rate ranges from 71.5% or 79.6% depending on the calculation method used:
 - (1) Divide the total number of RV and MH sites rented and owned by Winter Texans by the total number of RV/MH sites in parks.
 - (2) Average the survey responses to the question that specifically asks the Winter Texan occupancy rate in the park.

Four different estimates of Winter Texans in the Valley for 2017-2018 are shown in Table 4 using the information provided previously:

Table 4. Estimations of Winter Texans in the Valley for 2015-2016

Method	Park sites	Park HHs	Non Park HHs	Total WT HHs	Total WTs
Method 1: Avg. No. WT in parks from survey x number of parks	237 x 279	66,244	6,632	72,875	136,277
Method 2: 79.6% Calculated occupancy rate x number of total park sites		57,494	45,789	4,584	50,373
Method 3: 71.5% Reported occupancy rate x number of total park sites		57,494	41,108	4,115	45,224
Method 4: Reported 8,000 increase (45,034 HH in parks in 2016)			53,034	5,309	58,343
Average		51,544	5,160	56,704	106,036

As shown in Table 4, the number of Winter Texans in the Valley may range from 84,568 to 136,277 depending on how the number is calculated. An average of the four different methods yields an average, rounded estimate of the number of Winter Texan households in the Valley during 2017-2018 as about 56,700 or 106,000 total Winter Texans.

Table 5. Direct Impact of Winter Texans on Valley Economy

Year	Number of WTs	Average expenditure per household per visit	Direct Dollar contributions (in millions)
1986-87	71,000	\$ 2,592	\$ 92
1987-88	76,000	\$ 4,053	\$ 154
1988-89	79,000	\$ 4,051	\$ 160
1989-90	81,000	\$ 4,765	\$ 193
1990-91	79,000	\$ -	-
1991-92	84,000	\$ 4,762	\$ 200
1992-93	87,000	\$ 5,103	\$ 222
1994-95	97,000	\$ 5,155	\$ 250
1996-97	120,000	\$ 5,317	\$ 319
1998-99	124,000	\$ 5,306	\$ 329
2000-01	143,000	\$ 4,601	\$ 329
2002-03	123,000	\$ 4,065	\$ 250
2004-05	127,000	\$ 6,614	\$ 420
2005-06	127,000	\$ 9,976	\$ 634
2007-08	127,000	\$ 9,555	\$ 607
2009-10	144,000	\$ 10,700	\$ 803
2011-12	133,400	\$ 10,800	\$ 751
2013-14	100,000	\$ 13,400	\$ 710
2015-16	96,000	\$ 14,900	\$ 760
2017-18	106,000	\$ 9,314	\$ 528

Direct Impact of Winter Texans on the Valley Economy

With the estimate of the number of Winter Texans in the Valley determined, the impact that Winter Texans have on the region's economy can then be determined. With about 106,000 or 56,700 Winter Texan households in the Valley during the 2017-2018 season who spent an average of \$9,314 per household (from Table 2), Winter Texans made a direct economic contribution of \$528 million to the Valley's economy during the 2017-2018 season. This result, along with results from prior studies, is shown in Table 5.

Conclusion

This 2017-2018 Winter Texan Report contains the demographic characteristics, stay characteristics, and expenditure patterns of 744 Winter Texans who participated in the study this year. Along with this year's results, this report provides responses to the same types of questions from Winter Texans since 2006.

In general, most characteristics of this year's study participants are similar to respondents from past studies. For example, as in past years, this year's average study respondent is married and Caucasian with at least some college education, is in a two-person household and has been retired for more than one year. This year, Winter Texan households had an average income level of about \$64,500, down only \$500 from the last study.

This year's study participants had come to the Valley for an average of 11.3 years, stayed in the RGV for 133 days and owned their Valley residence, usually a mobile home/park model or an RV. The number of days this year's Winter Texans were in the Valley is the same as in the last study, the number of years coming to the Valley is down slightly from the last study. However, while the proportion of Winter Texans who own their own residence in the RGV had steadily increased since 2006 and RV ownership had declined, this year's study found a decrease in home ownership and an increase in RV ownership. This finding might be because of a larger number of first time Winter Texans who are more likely to own an RV.

The past five years' studies had suggested that Winter Texans were aging and not being replaced by younger Winter Texans; a trend which seems to have been arrested based on this year's study. For example, this study found that the percent of first-time Winter Texans is at a rate higher than any time since 2008. In support of this finding, slightly more of this year's Winter Texans are recent retirees. These findings could be a result of renewed efforts to market the RGV that began after the *2014 Winter Texan Report*. However, Winter Texans who participate in the study may not be representative of nonparticipants.

As in prior years, typical respondents come to the Valley for the climate, the friendly people, the low cost of living, and the social activities. While here, the activities most enjoyed by Winter Texans, as indicated by their responses of "often" or "a lot", include music jams, exercising and flea markets and are least likely to participate in softball, golf and fishing. As in previous years, most Winter Texan study participants plan to return to the Valley next year (95.5%).

The 2017-2018 Winter Texan respondents spent an average of an estimated \$32 million in Mexico border towns during their stay in the Valley. This amount is above the estimated

Mexico spending in the last report because more Winter Texans were in the Valley this year even though the reported spending per household was less on an average trip to Mexico. The proportion of Winter Texans who reported making at least one trip to Mexico as well as the average number of trips was about the same as in the prior survey year, but still well-below the peak of 96% visiting Mexico in 2008. This may mean that many Winter Texans are still concerned about perceived violence on the Mexican border and are choosing to remain on the U.S. side while in the Valley.

Finally, and most importantly, this year's study estimated the direct economic impact of Winter Texans on the Valley economy. Winter Texans reported spending an average of \$9,314 per household while in the Valley, down by about 37% from the prior study. However, the number of Winter Texans in the Valley is estimated at 56,700 Winter Texan households this year, an increase of about 10.8%. Despite the increase in the number of Winter Texans in the Valley, the decline in amount spent means that the total spending in the Valley during the 2017-2018 season is estimated at \$528 million, down significantly from the \$760 million reported in the last study.

Taken together, results from this study suggest the substantial influence that Winter Texans have on the Valley and the Valley economy. Thus, Valley residents, business and governmental officials should continue to make Winter Texans feel welcome to the area and continue outreach efforts to ensure that younger, baby boomer Winter Texans are coming to the Valley to replace their aging predecessors. These baby boomers may have different needs and interests which should be examined in future studies and addressed to continue the trend of an ever increasing positive impact of Winter Texans on the Valley economy.



Appendix A: Survey Instrument

Winter Texan Survey

Thank you for your responses to this important research. Please answer each question in this survey then return by mail OR COMPLETE ONLINE at <http://utrgv.edu/wintertexan> by February 26 for a chance to win a Kindle Fire. You must be 18 years of age or older to participate in this survey.

Mail to: Tourism Research Center

UTRGV – College of Business

1201 W University, Edinburg, TX 78539

For more information, contact

Dr. Penny Simpson at 956.665.2829

All information is CONFIDENTIAL

1. Are you a Winter Texan? Yes No
2. What is your home state or province? _____ state
3. What is your home zip code/postal code? _____ zip
4. How many days will you most likely be in the Valley? _____ days
5. Counting this trip, how many years have you been coming to the Valley? _____ years

6. What type of housing do you use while in the Valley?

- Stay with family/friends Hotel/motel
- Own RV Rent RV
- Own mobile home Rent mobile home
- Own apartment/condo Rent apartment/condo
- Own house Rent house

7. What are your reasons for coming to the Valley?

- Winter vacation Friendly people
- Shopping To visit Mexico
- Medical reasons Social activities
- Climate Nature activities
- Business Cost of living
- Visit friends/family Other _____

8. How often do you participate in the following activities while in the Valley?

	Never	Rarely	Some-times	Often	A lot
Sight-seeing in Mexico	1	2	3	4	5
Travel tours	1	2	3	4	5
Flea markets	1	2	3	4	5
Historical sites	1	2	3	4	5
Beach	1	2	3	4	5
Wildlife/nature refuges	1	2	3	4	5
Fishing	1	2	3	4	5
Museums	1	2	3	4	5
Golf	1	2	3	4	5
Festivals	1	2	3	4	5
Music/jams	1	2	3	4	5
Libraries	1	2	3	4	5
Birding	1	2	3	4	5
Bicycling	1	2	3	4	5
Zoo	1	2	3	4	5
Volunteering	1	2	3	4	5
Softball	1	2	3	4	5
Exercising	1	2	3	4	5
Crafting	1	2	3	4	5
Dancing	1	2	3	4	5
Shows by professional entertainers	1	2	3	4	5
Pickleball	1	2	3	4	5

9. List any other activities you enjoy _____

IN MEXICO BORDER TOWNS:

10. About how many trips will you make to a Mexico BORDER town this visit to the Valley? _____ # of trips

11. On average, how much do you spend, in dollars, on EACH TRIP to a Mexico BORDER town? \$ _____ per trip

12. In dollars, please estimate how much you spend, on average, per trip to a Mexico BORDER town on the following:

Shopping	\$ _____	Sight-seeing	\$ _____
Dining	\$ _____	Prescriptions	\$ _____
Dental	\$ _____	Doctor	\$ _____
Other (please specify)	_____		\$ _____

IN THE VALLEY:

13. Please estimate the average amount your household spends each month on the following while you are IN THE VALLEY (round to nearest dollar--no cents):

Groceries/ (per month)	\$ _____
Medical (per month)	\$ _____
Eating out(per month)	\$ _____
Housing (per month)	\$ _____
Entertainment (per month)	\$ _____
Clothing (per month)	\$ _____
Transportation (per month)	\$ _____
Utilities (per month)	\$ _____
Other (please specify)	\$ _____

14. Please estimate your TOTAL expenditures on MAJOR, ONE-TIME PURCHASES while in the Valley this visit:

Appliances	\$ _____	Automobile	\$ _____
Electronics	\$ _____	RV	\$ _____
Mobile home	\$ _____	Property	\$ _____
House/condo	\$ _____	Medical	\$ _____
Travel tours	\$ _____	Furniture	\$ _____
Other	_____		\$ _____

15. How much in TOTAL dollars (no cents) do you think you will spend while in the Valley this year? \$ _____

16. Have you ever spent the winter in another winter resort area? Yes No. If yes, where? _____
And why did you leave there and come to South Texas? _____

17. Do you plan to return to the Valley next year? Yes No



Turn page over

18. Why would you NOT return to the Valley (check all that apply)

- Health
- Family reasons
- Gas price increases
- Decrease in income
- Other (specify) _____
- Increased costs in the Valley
- Try new places
- Violence or terrorism
- Unhappy with the Valley

19. Do you use the internet while in the Valley? Yes No

20. On an average day, how much time do you spend on the internet in the following activities?

	Never/ almost never	Less than ½ hour	½ to 1 hour	2 to 3 hours	More than 3 hours
Messaging	1	2	3	4	5
Browsing	1	2	3	4	5
Streaming music	1	2	3	4	5
E-mailing	1	2	3	4	5
Shopping	1	2	3	4	5
Reading news	1	2	3	4	5
Streaming movies/TV	1	2	3	4	5
Facebook	1	2	3	4	5
Twitter	1	2	3	4	5
YouTube	1	2	3	4	5
LinkedIn	1	2	3	4	5
Instagram	1	2	3	4	5
Other (write in)	1	2	3	4	5

21. How likely are you to get the following types of information from the internet?

	Not at all likely	Not likely	Some times	Likely	Very likely
News	1	2	3	4	5
Shopping	1	2	3	4	5
Entertainment	1	2	3	4	5
Medical	1	2	3	4	5
Travel	1	2	3	4	5
Things to do	1	2	3	4	5
Restaurants	1	2	3	4	5

22. Please rate how important the following are to your Internet use and gratification:

	Very Unimportant			Very important		
Chatting	1	2	3	4	5	
Interacting with family/ friends	1	2	3	4	5	
Interaction with unknown others	1	2	3	4	5	
Information to answer my questions	1	2	3	4	5	
Learning	1	2	3	4	5	
Research	1	2	3	4	5	
Search engines	1	2	3	4	5	
Technology	1	2	3	4	5	

23. How much money, in dollars, would you estimate you spent for purchases on the Internet during 2017? \$ _____

24. What comments or recommendations do you have for city officials in the Rio Grande Valley?

25. Including yourself, how many people are in your household while in the Valley? # of people in household

26. What is your age? years old

27. What is your gender? Male Female

28. What is your ethnicity?

- White
- Black
- Hispanic
- Asian
- Mixed
- Other _____

29. What is your marital status?

- Married
- Single
- Widowed
- Divorced/separated

30. What is your highest educational attainment?

- Less than high school
- Some college, no degree
- Bachelor's degree
- High school graduate
- Associate's degree
- Graduate/professional degree

31. What is your current employment status?

- Work full-time
- Work part-time
- Unemployed (looking for a job)
- Other _____
- Retired within past year
- Retired more than one year

32. What is your combined annual household income?

- less than \$20,000
- \$20K-\$29,999
- \$30K-\$39,999
- \$40K-\$49,999
- \$50K-\$59,999
- \$60K-\$69,999
- \$70K-\$79,999
- \$80K-\$99,999
- \$100K-\$149,999
- \$150,000 or more

33. Would you agree to serve on a consumer panel where you might be contacted up to 2 times a year for your opinion about issues or products? Yes No

ENTRY FORM for PRIZES

Name _____

Valley address _____

City: _____ Phone Number _____

e-mail address _____

All information is **confidential**. Winners will be notified no later than March 12.

COMPLETE ONLINE AT www.UTRGV.edu/WinterTexan

OR mail to: Tourism Research Center
UTRGV – College of Business
1201 W. University Blvd
Edinburg, TX 78539

This research has been reviewed by the UTRGV Institutional Review Board (IRB). Please contact the IRB if you have questions about your rights as a research subject (956-665-2889 or irb@utrgv.edu).

THANK YOU VERY MUCH!!!

Appendix B: Winter Texan Comments

Unedited comments by Winter Texans in response to the question: *What comments or recommendations do you have for city officials in the Rio Grande Valley?*

- Fill pot holes in the streets, 2. pick up liter, 3. Clean up graffiti. at Golf View Estates & Surrounding area
- 18 years spent here. Traffic is impossible driving rush hour my husband has been in the hospita & nursing homes for 2 years
- A + great
- A clean city, good signage,safety, fair prices for gas, clothes etc. Is what makes a city appealing.
- A high grade for them
- a visitors map for each town or group of towns
- All intersections need street signs
- Alleviate traffic congestion!
- Ban plastic bags; clean up abandoned properties, and pick up trash/yard waste when homeowners put it out in front of their homes; more street cleaning to keep gravel minimized (fewer rock chips in vehicle win
- Be good to the winter Texans and pay attention to their needs
- be honest, do the best you can
- Be more American, less Mexican. This is not Mexico!
- Being honest
- Better internet service/providers; enforce codes like trash removal, etc for city beautification
- Better lighting on side streets & improving roads, potholes
- Better roads.
- Better side roads
- Better signage for streets
- Better street signs or signs on streets
- Better street signs.
- better streets & road signs, some streets don't have any crossings
- Better traffic control, speeders on the roads, broken windshield on cars & trucks
- Better weather.
- Better zoning codes
- better/more recycling area
- Big job wouldn't want it
- Building code. Get a stick to it. Condemn poor housing. pick up curb side trash.
- City Govt too big and spending too much. When expansion stops, they will be out of money because of their current spending habits. stop raising taxes, I enjoy winter texan expos and newspaper.
- clean up
- Clean up corruption
- Clean up garbage along with roads.
- Clean up junk
- Clean up neighborhoods
- Clean up the area
- Clean up the junk on street & ditches,homes. Don't mess with taxes, it is messy enough
- Clean up the RGV. Make decent & safe connected bike trails and KEEP THEM CLEAN/FREE FROM DEBRIS AND GRAVEL
- Clean up trash along the roads
- Clean up trash on the side of the roads-repair holes in the road
- Clean up your government
- clean up your political corruption
- cleaner eating establishments, more English spoken
- Continue being "friendly" to Winter Texans - that's why we come here instead of other states
- Continue good work they are doing.
- Continue to improve bike paths and roadways
- Continue to make us feel welcome here.
- Continue to make us welcome
- continue to promote the local high school activities and local theater groups. We don't always want to spend all our time in the resorts.
- Continue upgrades on highways, streets and buildings. Demolish older decrepit buildings to clean up Valley
- Continue with major highway expansion/cleanup unsightly areas/condemn buildings abandoned
- Cut Cost & Spending Bible Reading in Schools enforce the law
- Direct Air Flight from Manitoba Canada to Harlingen would be wonderful! Would solve many travel problems as we age
- Do a better job of road repairs
- Do not charge senior Winter Texans school taxes on real estate tax
- Do not keep raising taxes
- Do not schedule so much road construction at one time in high traffic areas.
- Do not tax RV's or raise fees
- do something about stray dogs please
- Doing a good job
- Don't be corrupt
- don't get greedy with Taxes
- Don't have any complaints but don't like that you almost need to speak Spanish.
- don't look down your nose so much at non latino people
- Don't forget that Winter Texans choose to live here.
- DONT PRICE YOUR SELF OUT OF WINTER TXANS TAXES ARE OUT OF HAND
- Dont take us for granted. We were told they raise our taxes when they are short!
- Driver education, traffic laws
- Elect a new park board for Cameron County

- Encourage better internet presence for businesses
- Encourage more trash clean up from roads
- Enforce health codes and cleanliness and laws in restaurants and public places and encourage/create activities for Winter Texans
- Everyone should be able to speak English!
- Fairness in issuing traffic tickets
- Fight the border wall HATE the idea. Continue to work on cleaning up unsightly areas in and around town. Is there even any zoning here?
- Fight the wall placement at Santa ana
- Figure out a better flow for cars in the construction area off Bicentennial/Ware/Macoll/10th. During peak hours, all the "on" ramps should be closed off to the Interstate highway. There are so many huge back-u
- Figure out what will attract the next generation after the baby boomers. Retirement dollars will be less in the next two generations. lots of questions to answer ... will they come in RV/ motorhomes (sales sti
- Fill in the pot holes you have.
- Fix midway-in Donna, Fix Valley view road - Donna, new road signs like on Salines
- Fix pot holes in all streets & Parks
- Fix pot holes in roads
- Fix pot holes, improve the internet improve traffic flow etc
- Fix potholes in roads
- Fix some of the roads
- Fix the road to Fun N Sun Resort.
- Fix the roads
- Fix the roads bordering Fun n Sun near San Benito
- Fix the streets; fill pot holes, enforce building codes, remove all the old houses & businesses
- fix the streets, speak English
- Forbid the use of air boats in Port Isabel waterways.
- Friendly people-helpful. Many things to do & places to eat good. Transportation via air. road from MN weather
- Gatherings for seniors
- get all street signs up, At Ware frontage rd. going East needs signs prior to intersection, also Shary & others
- Get real; quit wasting money on Convention Centers; use a BALANCED BUDGET; withour your means.
- Get rid of ugly rotting falling wooden fences and let homeowners decide if the want a fence blocking view of neighborhood. Fences are an eyesore one year after installtion. Have a tv channel dedicated to vall
- Get some good country music singers here
- Get the internet for Wilder Resort Trophy Gardens. WE have not had internet this year except for 2 days.
- Get the roads fixedd (construction)
- Get your street signs in order & lane signs especially bad on intersections going under Interstate-2. Some streets have 3 names, very confusing sometimes. Trying to find an address on the service roads is alm
- Give the you what they need, they are the mose likeable people I have encountered in my travels
- good
- Good job
- Great
- Great area with great people
- Great place...love it here
- Greater cell service, stronger internet speeds. More green space areas, bottle and can recycling.
- hand out welcome packets
- Harlingen is a wonderful city to live in-Great Job City Adminstrators
- Have channel 5 respect Mr. Trump
- Have fast internet that Winter Texans that they can get for 3-6 months instead of this slow internet that are offered in the RV Parks.
- Have some out door showers when the weather is good
- have street sweepers sweep bike lanes as well as streets especially on Business 83
- Have to figure out a way to increase more visitors to the Valley.....Marketing, Marketing, Marketing!!
- Have tv programs translated to english
- hire people who speak English
- Honestly, High moral standards
- Honesty
- Hve better maps of your cities.
- I have appreciated the friendliness of the RGV for all the 28 years.
- I like that there is less litter and more recycling than 10 years ago.
- I saw the mcallen mayor arresting a person in an article. and following it up by saying mcallen is safe. This does NOT convey that picture. ANY reference to police work unless they are helping little kids I
- I simply prefer to be at home. My husband is for his health.
- I think they do a great job!
- I think they should have a dog park on South Padre Island
- I want good roads and well maintained bathrooms
- Improve broadband services keep things safe
- Improve intersections in Mission dips are too deep. Only thing I don't miss when I go back to IA
- Improve Lighting and Roads
- Improve road sinage so people can get across valley. A good map of combined Valley
- Improve services for education
- Improve the infrastructure. As we age Ada access is important. Why don't youtry rolling a wheelchair down some city streets-outside McAllen and Harlingen-but Weslaco, Mercedes etc.
- Improve the internet
- In need of road signs naming streets and cross streets
- Increase security
- Information is good on TV, paper, Winter Texan Times. Great place to come. I was in the RGV Hospital with the flue 4 days when I first arrived in case your interested.
- Infrastructure for more internet accessibility. Mark streets better
- Interchange 281 & 83 needs to be addressed. Too much traffic back up.
- It was good.
- It's perfect

- Keep cost down & keep us safe- no MS-13, breakin's etc
- Keep crime rate down, Valley safer for winter Texans
- keep doing what you are doing
- Keep doing what you are doing...I always feel welcome in the valley.
- Keep it retirement friendly - Taxes low
- Keep it safe
- Keep it safe and clean.
- Keep it safe and keep it friendly
- Keep it safe.
- keep it up!
- Keep roads in good condition.
- keep taxes low
- keep taxes reasonable
- Keep the good work at providing a welcoming environment for winter Texas!
- Keep the good work. Each year is better.
- Keep the grass cut, the trash picked up and speak English.
- Keep the property taxes down. Don't take financial advantage of winter texans!
- Keep the taxes down on Winter Texans, they are the backbone of your tax base. Keep increasing property tax and people will start to leave.
- Keep things safe-will not go back to Don Wes Flea Market as my truck was broken into and \$3,000 in tools stolen
- Keep things the way they are
- Keep up good work
- Keep up infrastructure and add new business
- Keep up the good job, improve some secondary roads.
- keep up the good work
- Keep up the good work
- Keep up the good work at up keeping the infrastructure
- Keep up the good work!
- Keep up the good work.
- Keep up the good work. Clean up crime. Help poor
- Keep up the good works
- Keep up the great work! :)
- Keep winter Texans high on priority list
- Keep working to keep all people safe. Keep illegals out and drugs out.
- Keepup the good work
- Learn people to drive and obey laws. correctly & obey traffic Laws & Speed
- Learn to move traffic safely without confusion. I could teach police how to do this within 1 hour of time for McAllen and Mission
- less corruption
- Love coming here!
- Love it here , keep up the good work.
- Love it here except for excessive speeders on the 2/83
- love it here will only come until travel insurance get to high
- Love it here!! This is our 2nd winter
- Love the friendliness of the Valley. Love welcoming us back
- Love the Valley & the people!
- Love the valley and the festivals
- Low prices keep people heading to Texas
- lower property taxes
- Lower property taxes on mobiles. Pickup garbage on roadways. Downtown needs a face-lift! Needs renovating.
- lower sales tax
- lower taxes
- Make AT&T improve their service here -phone & internet
- Make the old railroad line between Alton Gloor & Ruben Torres a bike/hike lane
- Make Winter Texans feel safe while the Valley
- mark highway lines bright
- Mark streets better
- McAllen should try to get a division 2 or 3 football bowl game, teams from the midwest would fill the stadium with fans
- Mobile houses are getting harder to sell. The price of the mobiles are dropping. I think that the value of mobile homes should be more in line with what they are worth than they are now.
- MORE BIKE LANES
- More bike lanes/green boxes-bike racks
- More coupons and discounts for winter texans.
- More coupons/savings opportunities for Winter Texans.
- More info for Winter Texans on safe shelters for storms, etc.
- More info on Reynosa--any shopping, restaurants and on work on getting cruise ships to Brownsville or Padre
- More police monitoring of traffic violations.
- More recycling and pick up litter. Teach children and adults
- More safe bicycle trails out of traffic
- More street names in Mission some streets not marked
- More things for teens to be involved in. They need more things that they can afford.
- More walking paths.
- More Winter Texan activities
- Most stores need more riding shopping carts. Promote all Welcome to Winter Texan activities you can. Most all businesses really make us feel welcome & appreciated.
- n a
- n/a
- N/a
- Na
- Need an affordable work out facility
- need better border control
- Need Independent craft brewery, tired of miller & bud. We have many of them in Grand Rapids, Mi- beer in city USA
- Need more effort made on recycling
- Need street repair on some side streets
- Need to promote the Valley up north on TV & papers
- nil
- no comment
- No comment-we enjoy the area
- NO cruise ships & casinos on SPI (You'll ruin it!)
- No recommendations
- No Reply
- none
- None
- None at this time

- None, it is there arena
- none. very content.
- Nothing
- nothing - we love it here
- Number of people are tending down, but RV park costs remain the same or higher, why?
- Offer tours of Amfels, Space X facility, other area businesses
- oppose border wall, protect immigrants, promote good relations with Mexico & Mexicans
- Paint lines on the streets.
- Palmview needs Pickleball
- Palmview police to patrol more and catch all speeders not just Winter Texans
- parks are great but maybe more walking paths
- Patrol better, Too man run red lights
- People are very friendly.
- People living in Sun Valley Village Harlingen were annexed into the city of Harlingen & our taxes are very high as we also pay Cameron County Taxes
- People need to not drive so fast. More Winter Texas News on T.V.
- Plan for Winter Texans
- Please end the nepotism, cronyism, and corruption.” The Dukes of Hidalgo” would make for a great TV comedy reality show.
- Please fight Trumps physical wall. It would be an environmental fiscal and economic disaster
- Please fix our roads that lead to our RV park. Fun & Sun
- Please fix the pot holes good detailed maps of the whole RGV
- Please improve internet access. Better street signage.
- Please keep up the warm welcome for Winter Texas and the protection and enhancement of natural areas. Thank you.
- please sweep the streets and fill in the big road holes.
- poor quality medical service, have had terrible experiences at 2 of the hospitals, labs in Edinburgh overcharge patients, lads in Mission charge 1/3 the price in Mission
- Potholes are horrible
- Promote more in the Northern States and Canada!
- promote the valley at trade shows outside Texas
- Promotion of events
- provide information in French for French Canadians
- put house numbers and street signs (6”) all over the valley
- Put more street signs above the streets. So many of them have nothing at all.
- Put shopping carts away-where they belong after shopping
- Put up traffic signs that make sense like the other 49 states do.
- Recycle! Make it easy!
- RECYCLE!!!!
- Reduce crime & illegals entering TX.
- Reduce crime, reduces taxes on RV trailers
- Remember you have a new generation starting to arrive - Baby Boomers - we are much more physically active and need more events centering around physical activity and not things like cards and bingo.
- Remove election signs after election
- Reopen Santa Anna Wildlife Refuge to bicycles. Reopen Laguna Antacosia to vehicles so we can bicycle there as well.
- REPAIR ROADS
- Repair roads, more police protection
- Repairing streets and cleaning.clean debris along roads
- replace faded street signs at intersections
- revamp looks of Harlingen main streets.
- Road clean up to minimize auto glass breakage
- Road Maintenance
- road repairs
- Roads marked better for us senior citizens
- RV parks r aging and younger people r not replacing them. Your taxes r a deterrent. Trying to sell park model because of taxes. Also internet is terrible.
- safety of winter texans
- Same
- San Benito - Don't try to sell a mud pie for a million dollars
- Senior bathrooms in restaurants.
- Side roads need repair. Some street need street signs.
- Smoother patching of the roads, including county road. Run promotional ads up North promoting the benefits of the RGV
- Some streets in Harlingen's downtown have one way signs attached in places where they are not clearly posted for drivers, which results in entering the wrong way.
- Sometimes language is a problem.
- speak more English
- SPEED BUMPS ON STREETS BESIDE RV PARKS
- Speed limit sign from Bentsen State Park to the canal
- STAY FRIENDLY
- STOP BRIBES, KEEP TRASH UP
- Stop corruption in government
- Stop ruining IslaBlanca Prk
- Stop the speeders and red light runners
- Stop the voter fraud, hiring or relatives, and petty-ante corruption. And lower taxes, please!
- Stop the WALL!
- Stop thinking you can break the law and don't live beyond your means.
- Street maintenance
- street signage at every corner
- Street signs above intersections
- Synchronize traffic lights
- tax in RV park is way to high, park people are paying already so thats double tax
- Texting drivers and people going thru red lights
- Thank you for being so welcoming to us each year. Very happy. People great here.
- Thank you for making us feel welcome
- the RGV is our second home
- the valley is growint so fast , i hope it doesnt outgrow the ability for winter texans on limited financial recourses to live hear.

- the way the locals drive- it no wonder our insurance is so high
- They do okay
- They have done a great job of making us feel welcome.
- They should work on cleaning up run down places, city or residential to make things more eye appeal.
- This has been a rough winter for us my wife has been going thru chemo done the first 12 weeks now starting the second 12 weeks so on spending and going here & there we sot season passes to the vipers, I go
- This is U.S.. Too many store clerks do not understand English. Overall cleaning/trash in town is bad. Too many autos as landscaping in yards.
- To address some of the trash in and around the town
- Too much "spanish" programming on the radio and TV. Need more "english" speaking TV channels...we can't afford Cable so we rely on signals from the air.
- traffic laws compliant
- Try to be ethical and transparent
- Use street sweepers!
- Very few Street numbers displayed on store fronts. Makes it hard to exact the location you are looking for.
- very friendly people lots of respect
- Very welcoming to Winter Texans
- Watch and do something reckless driving
- We are happy here
- We are very happy living here & we feel safe. We also like being out of the cold& our Drs. Are here in the valley.
- We dont need a new wall to separate Mexico and USA. Need trained border patrol
- We enjoy living in the Valley. Traffic light are a bit scary. We've had several near misses.
- we greatly enjoy our time in the valley we have tried FL and did not find it nearly as friendly The people of the valley show that they appreciate our being here. We will be coming here as long as we are a
- We like Raymondville
- We really love the support that communities here give to environmental and wildlife issues.
- We spent \$13,800 JF?M A 2017. N?D 2017 on food gas, groceries, purchases
- When you do the newspaper, please post things to do AHEAD of time. Not the day after.
- Why is there so much corruption in your elected and appointed officials? Clean up the litter in your residential areas. Have a spring and fall community free junk pickup. Make the RGV beautiful and litter f
- Wi-fi is often weak
- Winter Texan ID card
- Work at keep streets & up-ways clean of trash
- Work on enforcement of traffic rules--speeding, zipping in and out, u-turns very suddenly. On the plus side- officials are welcoming Winter Texans
- Would like the palm trees maintained better, 77 & 83 Debris swept up on a regular basis
- Would like to see city-wide WI-FI.
- would like to see groups adopting the highways. Don't like to see garbage along the roads.
- Would rather spend winter in the valley than in Illinois
- WT are important
- you raised the property taxes and the resorts have had to raise the rent--you seem to be cutting off your nose to spite your face. We bring the money and some of us will not be able to afford to come much lo
- You should advertise more about the Valley to future Canadian retirees, the cost of living compare to other destination (Florida)
- Your road construction seems to take a lot longer than in other locals. You have all year to work, et it seems to take you twice as long.

Appendix C: Park Manager/Owner Survey Instrument

Rio Grande Valley RV & MH Park Occupancy Study 2018

Please help us determine how many Winter Texans came to the Valley this year by completing this short survey. The survey is conducted by The University of Texas Rio Grande Valley Business and Tourism Research Center. All information is confidential.

Park Name _____ Park Manager _____

RV occupancy questions about THIS WINTER SEASON:	Mobile home/park model occupancy questions about THIS WINTER SEASON:
1. How many total RV sites are in your park? # _____ sites	1. How many total mobile home and park model sites are in your park? # _____ sites
2. How many total RV sites are owned by Winter Texans? # _____ sites	2. How many total mobile home and park model sites are owned by Winter Texans? # _____ sites
3. How many different Winter Texans households rented an RV site in your park: This year? # _____ Last year? # _____	3. How many different Winter Texan households rented a mobile home/park model space in your park: This year? # _____ Last year? # _____
4. What percent of all RV spaces in your park was occupied by Winter Texans at the peak time this winter? _____ %	4. What percent of all mobile home and park model spaces in your park was occupied by Winter Texans at the peak time this winter? _____ %

How many different Winter Texan households were in your park this year?
_____ # of households

Compared to last year, about how many more or less Winter Texans did you have?
_____ # more Winter Texans _____ # less Winter Texans or _____ about the same

Compared to two years ago, about how many more or less Winter Texans did you have?
_____ # more Winter Texans _____ # less Winter Texans or _____ about the same

Compared to five years ago, about how many more or less Winter Texans did you have?
_____ # more Winter Texans _____ # less Winter Texans or _____ about the same

What changes or trends did your park experience with Winter Texans this year?

Other Comments?

Does your park offer tenants a written rental agreement? Yes No

Want a summary of RESULTS? Please check the box and provide your address

Address: _____ City _____ Zip _____

Name: _____ e-mail address: _____

Ways to return this survey:	Mail to: Tourism Research Center UTRGV – College of Business 1201 W. University Blvd Edinburg, TX 78539	e-mail: penny.simpson@utrgv.edu Fax to: 956.665.2407
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Questions? Call Dr. Penny Simpson at 956.665.3384.

Appendix D: Park Manager/Owner Comments About Trends

Unedited comments by park managers and owners:

- Added a Tiki Hut social hour Wednesday & Fridays 3 -5 pm
- As Winter Texans age in our park, we are noticing more of our units are being bought by local Texans as opposed to Winter Texans. More and more we are seeing senior local residents move into the park likely due to affordable housing for Texan senior citizens.
- Demographics are changing, more baby boomers. Looking for more than jam sessions & pot lucks, usually stay only 2 months not 4 or 5.
- Didn't stay as long
- Health & could not return to park, deaths
- Increase in monthly and seasonal guest over the past couple of years
- It seems we are getting a few more Winter Texans each year with more and more people reaching retirement age.
- Less Canadians, Less 50 & 60s are coming, several have passed away
- Less RVs coming to the Valley & older winter Texans selling mibles outside park. Also WTs are selling moobiles because they don't want to pay the high property taxes! Also the parks are being taxed--ours raised 70% in 2 years!
- longer stays, RC track amenity grew exponentially this year
- lots of new people coming from all over the US & Canada
- More baby boomers are coming to the Vaelly. They come to rent a unit first, check out the resorts and purchase park models or mobiles. More active, less card playing and games, more out of park entertainment, pickleball is highly sought, volunteer less but will participate in activities, transition- older generation selling/new residents purchasing.
- moving away from dances, and shows and participating more in physical activities
- New generation is not choosing to come down for the winter months
- no changes, I haven't had winter Texans in 5 years
- No changes. They all come for weather & Mexico to get meals and dental.
- No comment
- No, we don't get many winter Texans and we got a boat grant
- Our company had very good specials for RV's plus we had people who came from Florida who were not able to go to their parks in Fla.
- Park became pet friendly and streets in park redone with asphalt
- Remodel Rec. Hall
- Remodeled laundry room and in process of remodeling pool restrooms
- Shuffle board is down. Geneology is strong. Horseshoes, poker, bingo are up this year. Paper crafts & country jam and entertainment are u-p. Ladies darts are strong. Card games are down
- Sold under owner this year
- Some went home for illness purposes. Some passed, some Canadians sold and rented
- Stated she only had permanent residence only, she had no winter Texans and that is all she could answer.
- They are the younger more active retirees. Looking for more active activities to do and socialize with friends.
- This year I can tell that people have lost loved ones. And others have passed away
- Very busy with new people & many just checking out the area
- We are now owned and operated by the leasholders and a 55+ park We are working hard to improve our park.
- We are on track to continue our growth into next season with about an 18% YoY increase in reservations.
- We are seeing a continued decline in Winter Texans. We reached capacity this year for the first time in 10 years due to younger workers. Provided Letter.
- We are the RV Captital of Texas, we have gun range, race track, we built a lake and have remote control tracks
- We experience much more sales than rentals to WTs. Most our rental were sold to WTs. This Winter Texans are much younger generation.
- We find more winter Texans are traveling with more toys and equipment
- We have always stayed steady occupancy each year
- We have free wifi, pet friendly, dog track new park models
- We have word of mouth advertising
- We offered a par rate for Canadians as well as a first timer RV rate for those new to the park
- We saw an increase of RVs compared to people wanting to purchase a unit
- Winter Texan business was way off this year in relation to the growth the park has experienced each of the previous years.
- Younger and first time winter Texans mixed in with the repeat winter Texans

The University of Texas
Rio Grande Valley

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