Kerrville, Texas Usage & Attitudes Study

for

Kerr Economic Development Foundation
Kerrville, Texas

December 2008

Cunningham Research Associates
500 Ashwood Lane
Fairview, Texas 75069

CONTENTS

INTRODUCTION

BACKGROUND

This report describes a *Kerrville, Texas Usage & Attitudes Study* to learn perceptions of the City of Kerrville and its immediate surroundings, and why the area is a magnet for consumers in the region, including shoppers, tourists, and other day-trippers and longer-stay visitors. The research was conducted during the last quarter of 2008.

Kerrville—with a city population of around 20,000 and a county population of around 48,000—is poised to undergo significant investment and a physical transformation. A master plan is being prepared for high quality, extensive development of the downtown area and beyond. This research took place among consumers who reside in popular origin markets that feed the Kerrville area. The short term goal of the research has been to produce compelling data that—along with real estate and traffic statistics—will influence desirable retail partners to include the area in their expansion plans. The overarching, actionable learning goals of the research might be distilled as follows:

- √ *Who is coming to Kerrville?*
- √ *Why are they coming?*
- √ *What would persuade them to come more often or to stay longer?*

RESEARCH OBJECTIVES

- ❑ To characterize or profile Kerrville visitors who reside in the area's popular feeder markets
- ❑ To prioritize the reasons why Kerrville appeals to past and prospective visitors
- ❑ To measure Kerrville's performance on salient choice/evaluation "destination" attributes
- ❑ To observe consumer differences in behavior or characteristics across key feeder markets
- ❒ To learn the appeal of given variables, factors, or attractions to increase destination traffic

METHODOLOGY

- Data that addressed the research objectives were collected by telephone interviewers who dialed from a central location using the appended questionnaire[1].
- Five hundred (**500**) interviews were completed over the course of one month—**October 6 to November 7, 2008.**
- The overall sample was split by gender and five feeder markets (or regions) of interest as follows:

OVERALL	GENDER		PRIMARY FEEDERS				
	MALE	FEMALE	SAN ANTONIO	AUSTIN	HOUSTON	DALLAS	REST OF TEXAS
(500)	(247)	(253)	(100)	(100)	(100)	(100)	(100)

- To qualify, the respondents had to claim the following:
  - Awareness of, or familiarity with, Kerrville
  - Awareness of Kerrville's location, at least in terms of approximate driving time from the subject feeder market
  - Experience with Kerrville (e.g., at least one day trip for shopping, visiting, medical/dental care, or some other purpose other than just passing through), ***or*** an expression of neutral or positive intent to visit Kerrville in the future for one or more of the same purposes.

[1] A computer-assisted version of this questionnaire was actually deployed.

CROSSTABULATIONS

The data were processed under the cross tabulation "banner" shown below to enable responses across given [mutually exclusive] sub-groups to be compared statistically. The base size of each sub-group is noted:

	GENDER		ORIGIN (FEEDER) MARKETS					KERRVILLE EXPOSURE			
								VISITORS			
									LENGTH OF STAY		
OVERALL	MALES	FEMALES	SAN ANTONIO	AUSTIN	HOUSTON	DALLAS	REST OF TX	TOTAL	DAY ONLY	1+ OVERNIGHTS	NON-VISITORS
(500)	(247)	(253)	(100)	(100)	(100)	(100)	(100)	(386)	(191)	(191)	(114)

BANNER—continued:

RESPONDENT AGE			CHILDREN IN HOUSEHOLD		EDUCATION	
UNDER 25	35 TO 54	55 OR OLDER	NONE	1+ CHILD(REN) UNDER 18	SOME COLLEGE OR LESS	COLLEGE GRAD+
(38)	(204)	(257)	(296)	(198)	(232)	(265)

STATISTICAL SIGNIFICANCE

In the cross tabulation data tables, *statistically significant differences* are noted as follows:

✓ *An uppercase letter below an observation denotes a statistically significant difference—with* ***99%*** *confidence—compared to the observation that bears that column label.*

✓ *A lowercase letter below an observation denotes a statistically significant difference—with* ***95%*** *confidence—compared to the observation that bears that column label.*

For example, in the excerpt below:

- With 95% confidence, the respondents in San Antonio were significantly more likely than those in Austin and the "rest of Texas" to say they will definitely visit or return to Kerrville.
- With 99% confidence, the respondents in San Antonio were significantly more likely than those in Dallas to say they will definitely visit or return to Kerrville.
- With 95% confidence, the respondents in Austin were significantly more likely than those in Dallas to say they will definitely visit or return to Kerrville.
- With 99% confidence, the respondents in Houston were significantly more likely than those in Dallas to say they will definitely visit or return to Kerrville.
- With 95% confidence, the respondents in Dallas were significantly more likely than those in the "rest of Texas" to say they will definitely visit or return to Kerrville.

"And how would you describe your likelihood to visit or return to Kerrville for any reason at any time in the future?"	PERCENT OF RESPONDENTS				
	ORIGIN (FEEDER) MARKETS				
	SAN ANTONIO	AUSTIN	HOUSTON	DALLAS	REST OF TX
	(100) (C)	(100) (D)	(100) (E)	(100) (F)	(100) (G)
"Definitely will visit or return to Kerrville"	40% **dFg**	25% **cf**	28% **F**	12% **CdEg**	25% **cf**

REPORT STRUCTURE

Following this **INTRODUCTION** is an **EXECUTIVE SUMMARY** of the research, with **CONCLUSIONS**, and then **DETAILED FINDINGS** based on the processed data. The **DATA TABLES** section contains the tabulated results of the data collection, including respondent *verbatim* or open-ended answers, as appropriate. The **APPENDIX** contains the questionnaire.

EXECUTIVE SUMMARY

OVERVIEW

Over the course of one month during the fall of 2008 (early October to early November), **500** consumers participated in telephone survey research in order to capture attitudes toward Kerrville, Texas and its Hill Country environs. Most of the survey participants came from one of four cities in the region (San Antonio, Houston, Austin or Dallas) that have historically—to one degree or another—been “feeder” or origin markets for visits to Kerrville; the balance (20% of the sample) was representatively distributed across the balance of the State.

To be credible and to qualify, the respondents had to claim some level of familiarity with Kerrville and its general whereabouts (at least in the sense of driving time from their location), if not first-hand [visitor] exposure to the city. In addition, they had to declare neutral or positive intent to visit (or revisit) Kerrville at some time in the future—that is, they could not be negative at the prospect.

The learning from this research will input plans for extensive development of downtown Kerrville and areas beyond downtown. In part, the survey profiled prior visits to the city (e.g., trip motives, transportation modes, accommodations, visit duration). Looking ahead, the interview also tested variables that will have a direct impact on shaping the development:

- The appeal of alternative uses for the Guadalupe River that runs through the city
- Interest in structural approaches to retail (e.g., a regional mall vs. detached shops)
- Interest in historically relevant themes that might characterize the development
- Retail categories (or specific retailers) that would attract visitor traffic from the region
- Interest in the prospect of an urban residential lifestyle (in downtown Kerrville)

OBSERVATIONS

- While all respondents were familiar with Kerrville, three out of four had visited the area one or more times in the past.
- Differences in first-hand experience with Kerrville fell along expected geographical lines. Nine out of ten respondents out of San Antonio had been to Kerrville; this was significantly higher than anywhere else. The Austin-based sample was likewise significantly more likely to have visited Kerrville than were those living in Dallas. Intent to revisit the area in the future or to visit for the first time fell along the same lines.
- Three out of ten respondents who had been to Kerrville at least once claimed "more than 10" visits in all, especially out of San Antonio. Males were also significantly more likely than females to make this claim. Virtually every visitor (94%) had arrived by automobile.
- Half the visitors had been to Kerrville on a day-trip; half had stayed overnight—typically one or two nights. Those coming from San Antonio were the most likely to claim day-trips to the area. Visitors from Houston were the ones most likely to claim stays of two nights.
- In descending order of mention, the accommodations for these visits were *a hotel or limited service hotel*, *with friends or relatives (especially when children were present), and a full service hotel.* A smaller percentage stayed at *an RV park or campsite.*
- The three most popular reasons for visiting Kerrville were *sightseeing or visiting historical places or museums; shopping or dining;* and *to visit friends or relatives.* Other reasons to visit (not mentioned as often) were *to use the River*, *for business,* and *for summer camp.*
- *Sightseeing or visiting historical places* was more likely to be mentioned by Dallas respondents than elsewhere; *shopping or dining* claims were highest out of San Antonio.
- When the respondents were asked to consider what is unique about Kerrville or its source(s) of greatest appeal, their codified answers reflected *inherent* rather than *introduced* traits—the area's topography, its scenery, and the quaintness of the city as it exists today—*Pretty location/landscape/ scenery; Small town/Country town/Not busy/Quaint; Hill country*.
- On a sub-group level, *Austinites* were more likely than any other market to characterize Kerrville as unique for its *Festivals (Folk festival/Food festivals/Etc.).* Also, *"Hill country"*

was more likely to be volunteered as a descriptor by persons with *a college degree or higher education* than by those with *less than a college degree*.

- Prior to testing the appeal of given development program elements, the interview elicited *general suggestions* as to how Kerrville might increase visitor traffic or lengthen the average visitor stay. The answers were distributed across a variety of generic responses—expanding retail, adding tourist attractions and new places to stay, and introducing unique events. Also considered important was preserving and promoting aspects of Kerrville that already draw visitors—such as the natural beauty and history of the area. Some even asked that the area not change from what it is now.
- There was a strong, general sentiment to keep the Kerrville retail landscape from being marred by a large influx of national chain outlets, and a corresponding emphasis on fostering local and one-off independent shops. Well known chain names were suggested nonetheless, if only [presumably] for the security of having access to known offerings, or else to assure the overall comprehensiveness of local shopping.
- A half dozen recreational uses for the *Guadalupe River* were tested for the interest that each might inspire. Four applications attained Top Box or "*Very Interested*" scores among at least one in three respondents. Three of these ideas were activities that could be pursued at a languid pace alongside the river with seemingly no impact on the River itself or the sanctuary ambiance of the environment. These were ***Picnicking along the banks of the River, Hiking on trails beside the River,*** and ***Viewing birds and wildlife in protected areas.*** The fourth activity that generated reasonable interest—***kayaking or canoeing***—would also seem to have only a modest impact on visitor enjoyment. The activities most likely to be distracting or disruptive—***paddle boating*** and especially ***power boating***—generated the least interest.
- Six ideas were tested that, if executed, would conceivably establish the character or set the tone for Kerrville's development. Notwithstanding the importance of a vital retail presence, the respondents favored development that would emphasize the "natural," while preserving the charm and history that define Kerrville right now:
  - √ *The preservation and restoration of historic places*
  - √ *Parks and open spaces with walking and bike trails . . .*
  - √ *Development alongside the Guadalupe River with viewing areas . . .*

- As for shopping, the respondents stated that they clearly wanted *detached specialty shops and restaurants* and *mixed use development* over the alternative of *a large regional draw mall*.
- Five themes are being considered in order to draw traffic to the area by inspiring visitor interest and creating differentiation. The most salient theme will presumably be executed as a Kerrville "brand" in advertising and promotions. Each of the five was tested for its general appeal—that is, first choice and second choices were captured. For the sample as a whole, and taking into account the first and second-choice elections combined, *"The Hills of the Hill Country"* and *"The Guadalupe River"* were the preferred themes.
- One creative idea under consideration is a **residential development** in downtown Kerrville for people who might want to work from their home, or commute from the area, or who might want to retire to the area. The respondents were asked to consider the *general appeal* of the idea regardless of their present life-stage. Only **16%** gave the idea a Top Box ("*Very Appealing*") rating. The mean rating was **2.56**, or mid-way between "*Not Very Appealing*" and "*Somewhat Appealing*."
- If and when they were to stay in Kerrville overnight (and if they were paying on their own), one respondent in three **(36%)** said that their lodging preference would be *a full service, moderately priced hotel.* A comparable proportion (**33%**) said they would opt for *a bed and breakfast.* After that, there was a substantial fall-off to a *motel* (**17%**), then finally *a luxury or resort hotel* (only **11%**).
- Six in ten responding households (**58%**) had been to a *museum* in the past half-year. About half (**46%**) had been to a *concert.* Almost as many (**43%**) had attended *live theatre* during that time.
- For the sample as a whole, **20%** or one in five said they have a full-time or part-time *vacation home.*
- The median age of the sample was 56.
- Nearly half the sample **(45%)** came from households with two members—helped no doubt by the presence of Empty Nester households. The same proportion (**43%**) had at least one child at home.
- The sample was highly educated. Half (**53%**) had graduated from college, including **21%** who claimed advanced degrees.

- The sample was also affluent. One in four (**27%**) claimed an income of *$100,000 or more,* including **13%** who had an income of *at least $150,000.*
- The sample was predominantly *white or Caucasian*. *Hispanics* and *African Americans* represented only **9%** and **3%**, respectively, of the audience. Asians comprised less than ½ of one percent.

CONCLUSIONS

- Sampling protocols assured that the sample-draw was representative of phone-owning households across the feeder markets. Nonetheless, the “Kerrville familiarity” or “Kerrville experience” filter had the effect of producing a qualified audience that was disproportionately Caucasian, educated, and affluent.
- From an economic standpoint, responding to this audience profile is likely to pay big dividends. Care may have to be taken, however, to assure that the development solution is not beyond the reach of all audiences that may someday be attracted to Kerrville.
- Kerrville is an in-State magnet for visitors because it represents the unpretentious, lifestyle antithesis of the feeder markets that were surveyed here. The area’s appeal is based on this contrast. The upcoming development will succeed—at least in part—to the extent the charms that characterize Kerrville today are preserved and hopefully reinforced in the future.
- The respondents expressed this general sentiment when they were presented various development options. Their choices spoke to things left in their pristine natural state to the extent possible so as not to impinge on the ambiance that is so valued today. Kerrville must still be instantly recognizable as Kerrville even after all the development is in place.
- Even the preferred communication themes—*Hill Country* and *Guadalupe River*—were consistent with this leave-well-enough-alone philosophy.
- Here are recommendations that emerged that seemed to point in a common direction:
    - *Preservation of the unique Hill Country landscape and vistas*
    - *Preservation of the slow-paced, small town, country feel*
    - *Development of the Guadalupe River that is dedicated to picnicking, hiking, and observing nature. To the extent the River itself is used, such use should be limited to canoeing or kayaking.*

- *Preserving and restoring historic places*
- *Creating parks and open spaces with walking and bike trails* . . .
- *Presenting retail as small, detached islands that are populated by independent, specialty merchants, with pedestrian traffic encouraged.* (Note: The concept of a large, regional draw mall was essentially rejected, even if the respondents stated a desire to [also] include national brands in the mix for the sake of a comprehensive shopping experience.)
- *Developing mixed use of entertainment, retail, restaurants, and exhibits* . . .
- *Creating overnight accommodations limited to a full service, moderately priced hotel rather than a resort hotel—the latter would seem out of place.*
- *Expanding bed and breakfast accommodations*

❑ Note that there were significant *market-level differences* throughout this analysis that may influence or modify these recommendations. For example, while San Antonio is clearly the feeder market that supports Kerrville with the most visitor traffic, other markets expressed differentiating preferences. Responding to Austinites, for example, would mean expanding the area's festivals and live music events.

DETAILED FINDINGS

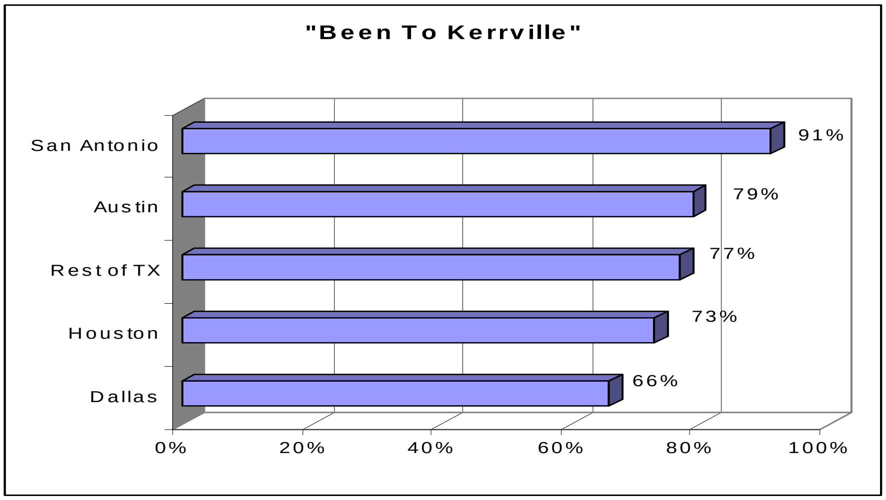
FAMILIARITY WITH KERRVILLE; SOURCES OF FAMILIARITY

To qualify, all respondents had to be at least *"somewhat familiar"* with Kerrville. In fact, **54%** said they were "*somewhat familiar*," while **46%** said they were "*very familiar*."[2] As for the substance of their familiarity, three respondents out of four (77%) said they had *"been to Kerrville one or more times for a reason;"* one in four (**23%**) said they *"only know the name."*

Predictably, there were sharp, *significant* differences in first-hand awareness of Kerrville as a function of location or geography (region):

- Nine out of ten respondents in *San Antonio* **(91%)** said they had been to Kerrville. This was significantly higher than the respondents out of *Houston* (**73%**), out of *Austin* (**79%**), those living in *Dallas* (**66%**), and those living in the "*rest of Texas*" (**77%**).
- In addition, the claims of first-hand exposure to Kerrville coming from the *Austin*-based sample (**79%**) were significantly higher than those coming out of *Dallas* (**66%**).

[2] Awareness of two "decoy" cities—Winnie and Marfa—was also asked. Among the qualifying audience, only 9% coincidentally claimed to be "very familiar" with Winnie, while 17% said they were "very familiar" with Marfa.



FAMILIARITY WITH KERRVILLE; SOURCES OF FAMILIARITY—*CONTINUED*

To minimally qualify, the respondents had to acceptably describe *"Kerrville's general location"* or *"how far it is from you now."* Far and away, "a few hours" or "a couple of hours away" was the most frequently heard response, volunteered by roughly two thirds of the sample (**64%**). Other popular (and acceptable) responses were "half a day" (**8%**) and "Hill Country" (**8%**).

The complete array of "location" answers provided by **2%** or more of the sample is shown here:

➢ ***"WHERE IS KERRVILLE? (HOW FAR AWAY?)"***

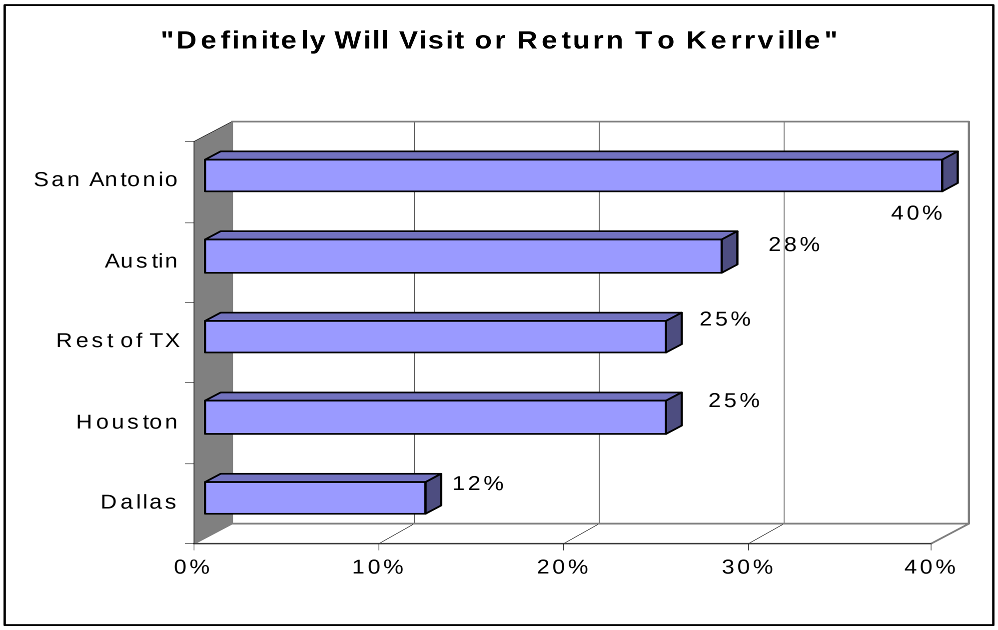
LOCATION RESPONSE/ DESCRIPTION	% OF SAMPLE
Few/Couple Hours	64%
Hill Country	8%
Half a day	8%
Less than a day	5%
Near San Antonio	3%
Less than an hour	2%
Less than 100 miles	2%
100 miles or more	2%

LIKELIHOOD TO VISIT OR TO RETURN TO KERRVILLE

Whether they had already been to Kerrville or not, the respondents stated their likelihood to visit (or revisit). For the sample as a whole, one in four (**26%**) said they "*definitely will*" visit or return; about one in three (**36%**) said they "*probably will*," while a comparable proportion (**38%**) were neutral or indifferent ("*might or might not visit/return*").[3] Thirty-two percent (**32%**) of *visitors* said they would definitely visit (again) compared to only **5%** of non-visitors who said they would *definitely visit* (for the first time)—a significant difference.

Intent varied by market, favoring San Antonio over the other origin cities:

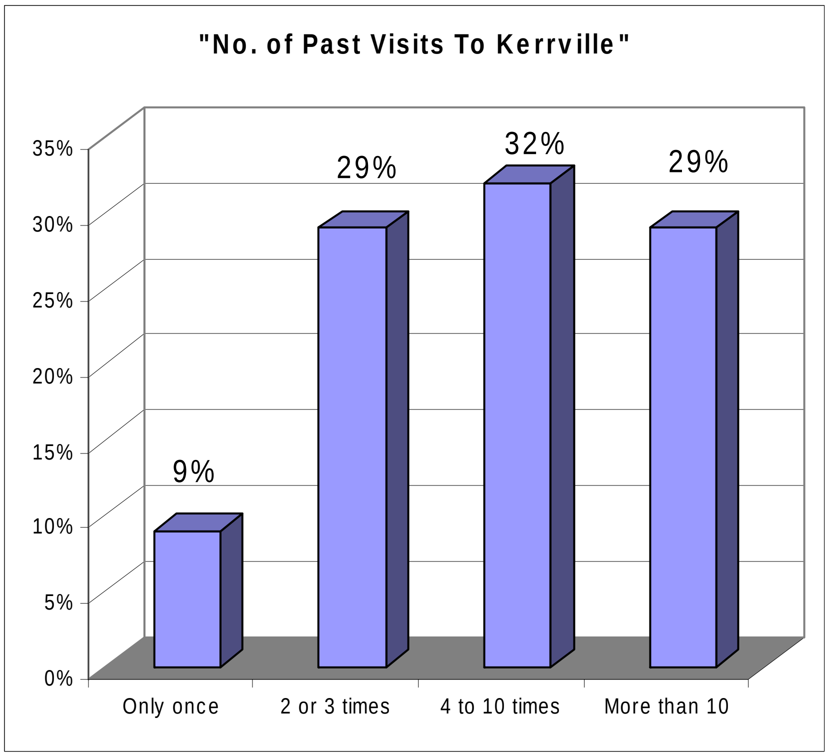
- Forty percent (**40%**) in *San Antonio* said they will definitely visit—the highest of the feeder market responses.
- This observation in *San Antonio* was significantly higher than the **25%** in *Houston*, the **12%** in *Dallas*, and the **25%** in the *rest of Texas* who expressed the same level of strong positive intent to visit or to return.



[3] Respondents who were negative at the prospect of visiting or returning were disontinued from the study as not beneficial to our objectives.

KERRVILLE VISITS: NO. & LENGTH; TRANSPORTATION; WHERE STAYED

One in ten past visitors to Kerrville (**9%**) said they had only been once. Three in ten (**29%**) said they had been *"two or three times;"* one in three (**32%**) said "*between 4 and 10 times;"* while another 3 in 10 (**29%**) said *"more than 10 times."*



On a gender level, *significantly* more females than males (**12%** vs. **6%**) said they had been "*only once,"* while *significantly* more males than females (**36%** vs. **22%**) said they had been "*more than 10 times."*

True to the other geo-tied responses, the respondents from San Antonio were, generally speaking, significantly more likely to claim *the highest number of past visits to Kerrville* and were the *least likely* to claim *only one past visit:*

➢ ***NUMBER OF PAST VISITS TO KERRVILLE:***

"HOW MANY TIMES HAVE YOU BEEN TO KERRVILLE?"	FEEDER MARKET (% OF RESPONDENTS)				
	SAN ANTONIO (C)	HOUSTON (D)	AUSTIN (E)	DALLAS (F)	REST OF TEXAS (G)
Only once	5% f	8%	8%	17% c	10%
Two or three times	12% DEFG	42% C	29% C	38% C	30% C
Four to 10 times	40% d	25% c	32%	27%	34%
More than 10 times	42% dFg	25% c	32% f	17% Ce	26% c

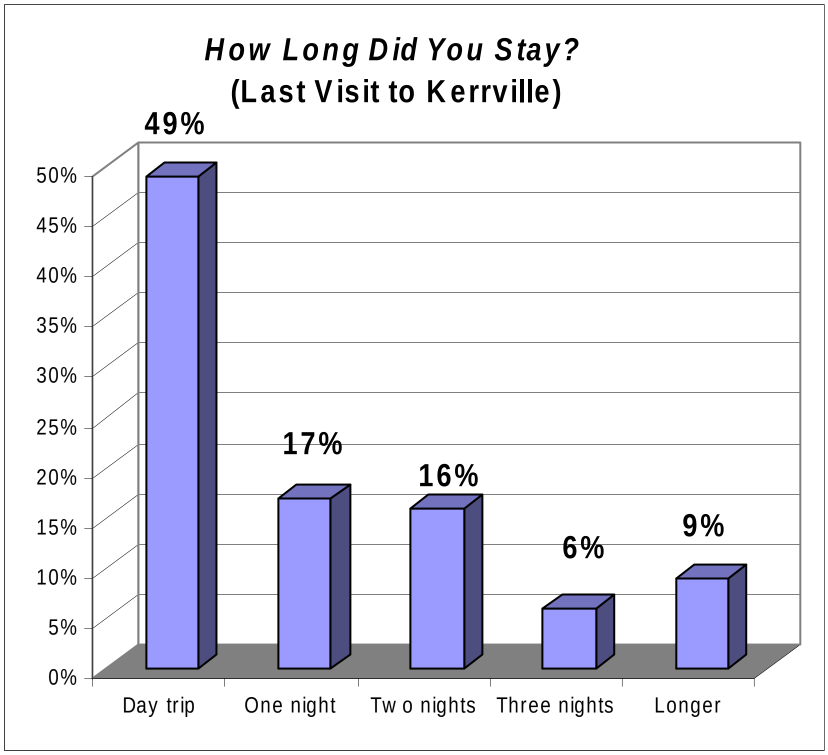
*   *   *   *   *

On the occasion of their last visit to Kerrville, virtually everyone (**94%**) had taken or was transported by an *automobile*. Two percent (**2%**) came by *RV/motor home*; one percent (**1%**) took a *charter bus*; **2%** came by *motorcycle*; and one person (less than ½ of one percent) came by *private airplane.* Three individuals claimed "other" arrival methods—*temporary service truck, horseback, or commercial airline and commercial car*.

*   *   *   *   *

Half the overall sample (**49%**) had been to Kerrville on a *day trip* (no overnight stay(s)) when they last visited.

- ***17%** stayed for one overnight*
- *A comparable percentage (**16%**) stayed two nights*
- *Three percent (**3%**) stayed three nights*
- *Nine percent (**9%**) stayed longer*



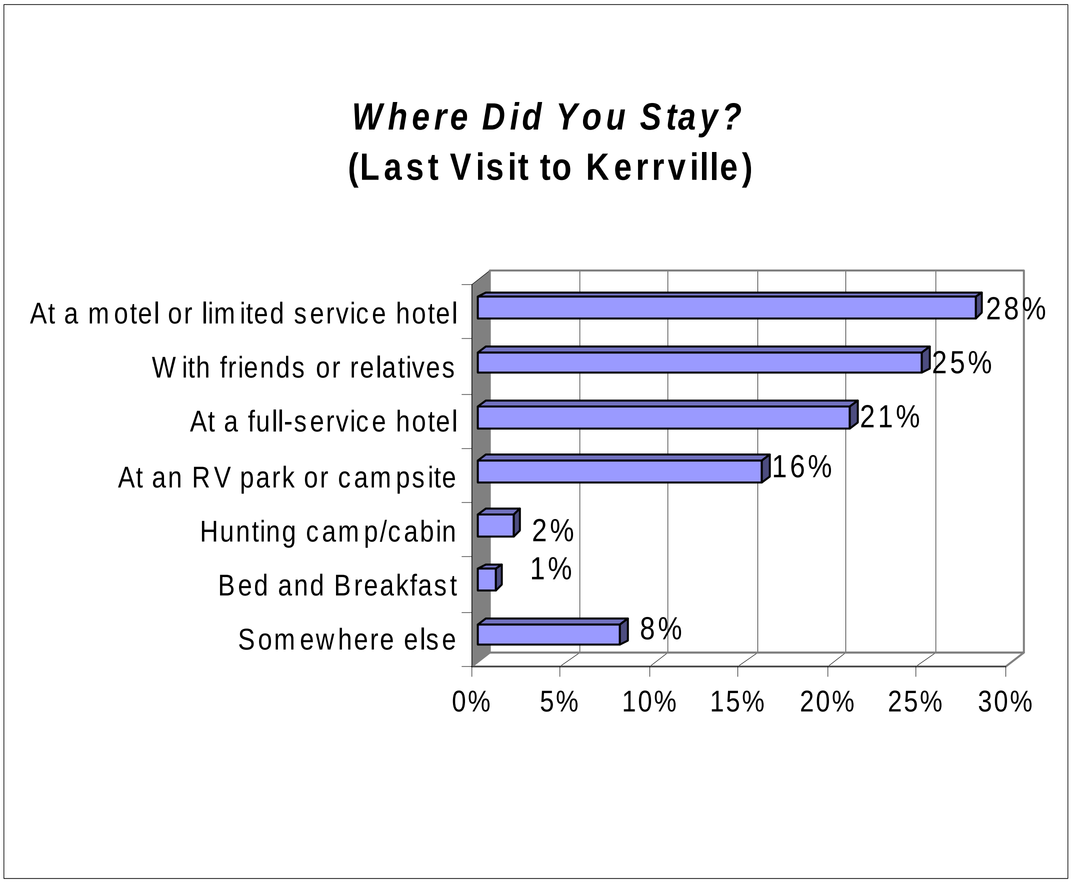
Visitors from *San Antonio* were significantly more likely than anywhere else to claim *day-trips* to the area (**74%** of those coming from *San Antonio*), while travelers from *Houston* were the ones most likely to claim stays of *two nights* (i.e., **29%** of those coming from *Houston*). By observation (though not significant), respondents coming from the "*rest of Texas*" were the most likely to claim stays longer than three nights (i.e., **16%** of that sub-group).

➢ ***HOW LONG DID YOU STAY? (LAST VISIT TO KERRVILLE)***

"HOW LONG DID YOU STAY?" (LAST VISIT)	FEEDER MARKET (% OF RESPONDENTS)				
	SAN ANTONIO (C)	HOUSTON (D)	AUSTIN (E)	DALLAS (F)	REST OF TEXAS (G)
Day trip	74% DEFG	33% Ceg	51% Cdf	32% Ceg	51% Cdf
One night	10% F	16%	19%	29% C	16%
Two nights	7% DeF	29% CG	18% c	21% C	10% D
Three nights	3% d	12% ce	3% d	9%	6%
Longer	7%	7%	9%	9%	16%

Finally, the respondents were asked *where they stayed* (i.e., the type of lodging) the last time they visited the area. For the sample as a whole, "*at a hotel or limited service hotel*" was the most popular response, given by **28%**. This was followed closely by "*with friends or relatives*" (**25%**) and "*at a full service hotel*" (**21%**). Sixteen percent (**16%**) stayed an "*an RV park or campsite*," while **2%** stayed at a "*hunting camp or cabin*," and **1%** said they stayed at a "*bed and breakfast*." Fifteen respondents—**8%** of the sample—said they stayed "*somewhere else*":

- *The hospital*
- *Camp Flaming Arrow*
- *Ranch house (2 mentions)*
- *Privately owned music festival site*
- *The HEB lodge*
- *Camp Mystic*
- *Owned a lot there*
- *Live in Kerrville part of the year*
- *Home in Ingram, Texas, six miles from Kerrville*
- *I work there so I stayed at the place where I work*
- *Home*
- *Moe Ranch*
- *Vacation house of grandfather's college*
- *At the place of business*



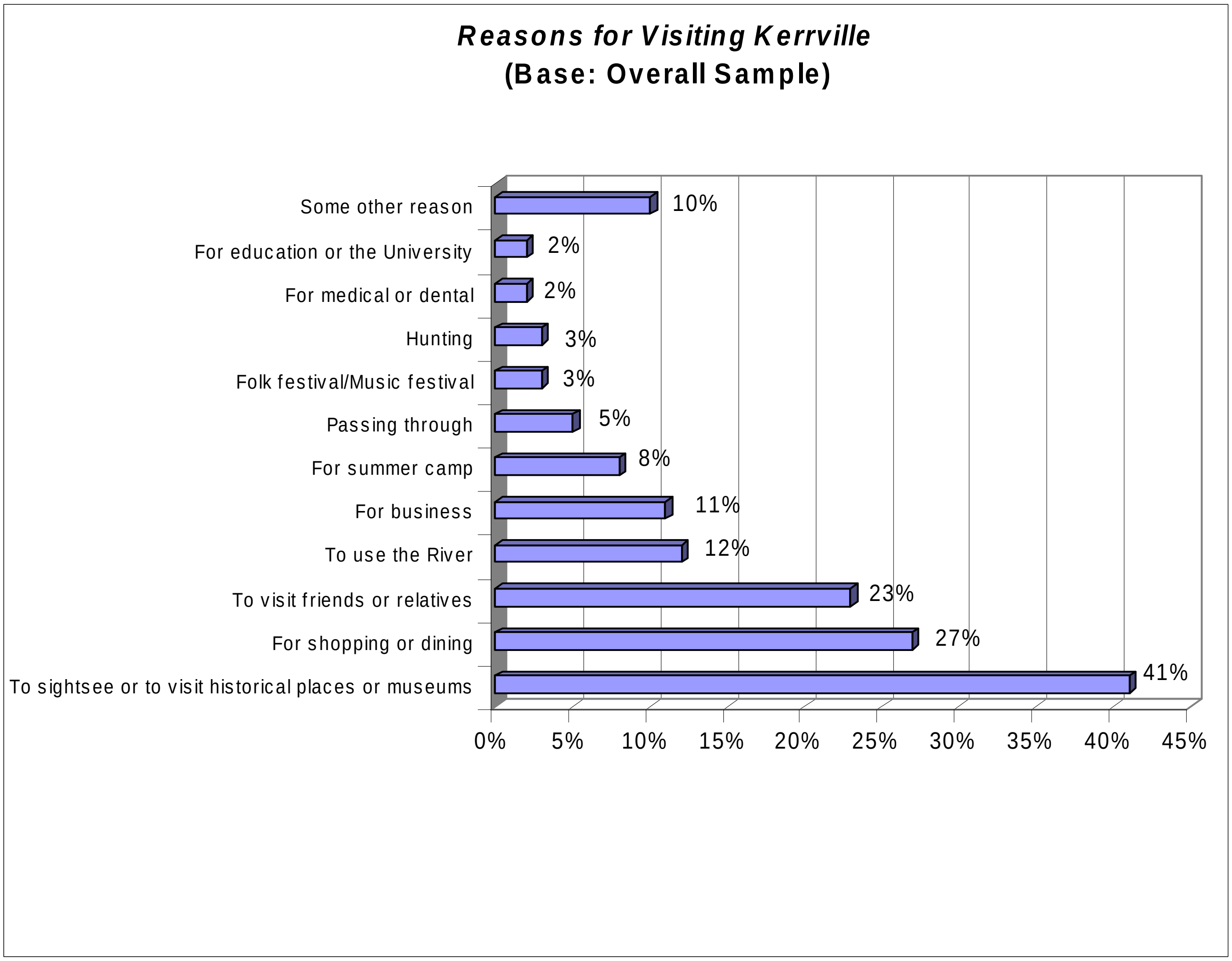
On a sub-group level, respondents from *households with one or more children* were significantly more likely than *households without children* to claim stays "*with friends or relatives*" **(33% vs. 19%).**

REASONS FOR VISITING KERRVILLE

The most popular reasons for visiting Kerrville in the past seemed to resonate with projects that will likely characterize the area's planned development. In descending order of mention, here is how the dozen or so *pre-listed (cued) reasons* for visiting Kerrville fared on this question:

➢ ***REASONS FOR VISITING KERRVILLE:***

- *To sightsee or to visit historical places or museums:* ***41%***
- *For shopping or dining:* ***27%***
- *To visit friends or relatives:* ***23%***
- *To use the River:* ***12%***
- *For business:* ***11%***
- *For summer camp:* ***8%***
- *Passing through:* ***5%***
- *Folk festival/Music festival:* ***3%***
- *Hunting:* ***3%***
- *For medical or dental:* ***2%***
- *For education or the University:* ***2%***
- *Some other reason:* ***10%***



➢ ***SIGNIFICANT SUB-GROUP OBSERVATIONS:***

- "*Shopping or dining*" was more likely to be claimed by females (**34%**) than by males (**20%**)
- "*Shopping or dining*" claims out of San Antonio (**43%**) were higher than any other market.
- Visiting the area "*to sightsee or to visit historical places or museums*" was significantly higher out of Dallas (**56%**) than out of any other market.

REASONS FOR VISITING KERRVILLE—*CONTINUED*

Fifty (50) respondents (**10%**) volunteered reasons that did not fit into any of the cued suggestions. These reasons and comments, mostly one of a kind (including some that are irrelevant) should be perused for additional insights:

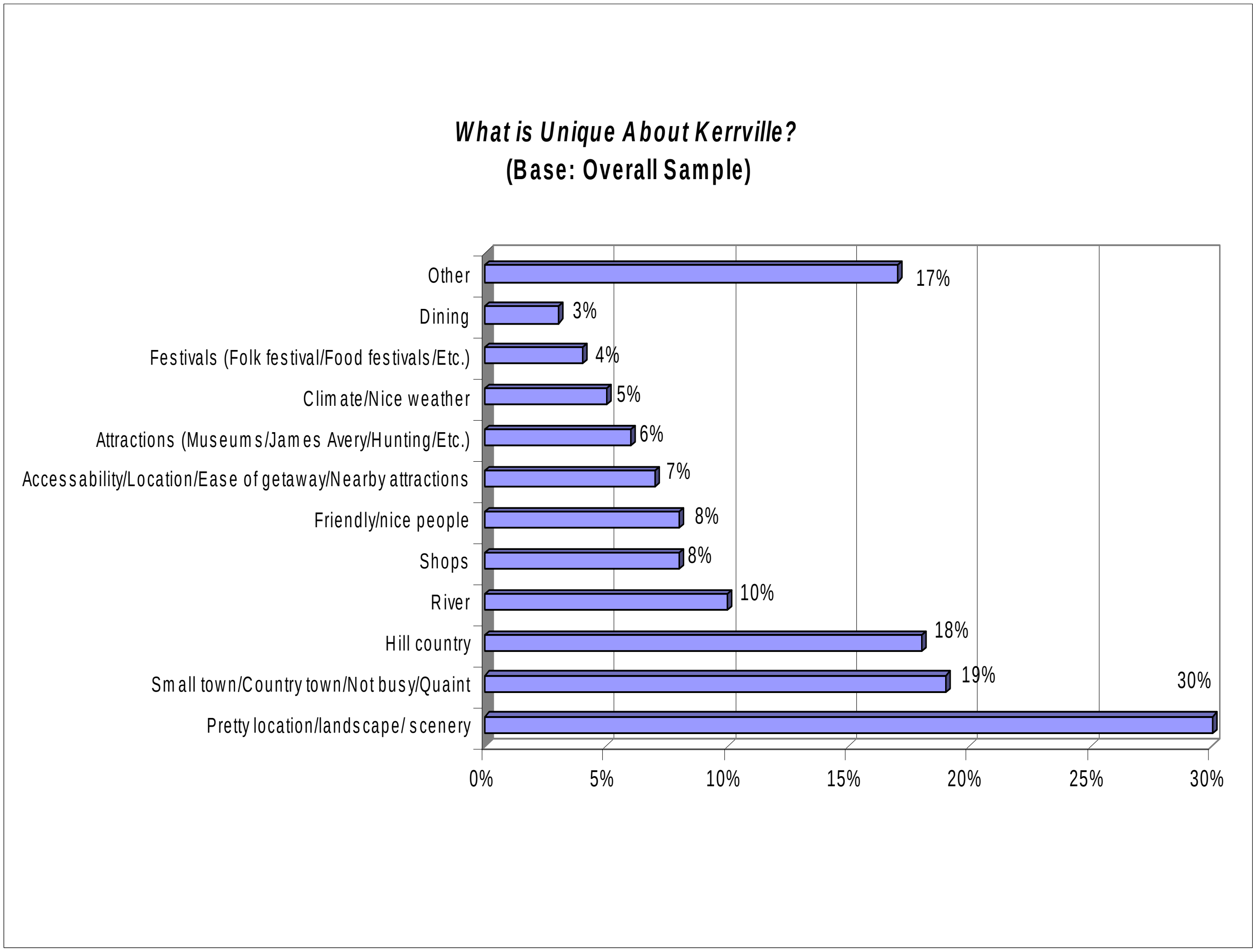
- Visiting potential land developments
- 4th of July celebration
- Art galleries and antique stores
- Auto auction, antique cars
- Camping (2 mentions)
- Church (4 mentions)/Church retreat center
- Concerts
- Conference
- Craft show
- Dig Airheads
- Easter Star Chapter
- Entertainment
- Going to a club
- Horse races
- I live here
- I would not go to Kerrville; there is nothing there
- Looking at land/My dad was looking for a place to buy a ranch/Farm/Potential place to live
- Meet Special Olympics
- My son's sports team plays against Kerrville/Sporting events/Football games/For a basketball tournament
- New Year's Eve
- Recreation rallies/RV rally
- Retirees get together
- Sightseeing, wild life
- Stayed there because I couldn't find a motel in Fredricksburg
- Vacation (3 mentions)/Summer vacation
- To be with family and visit around the location
- To play golf (4 mentions)
- To see the hill country
- Used to be a commercial pilot and my boss's mother lived in the town next to Kerrville so we would land there
- We thought the hurricane was coming
- We went because we like to travel Texas roads and see what we haven't seen before
- Wedding
- With my parents on a trip

KERRVILLE'S SOURCES OF UNIQUENESS; SOURCES OF GREATEST APPEAL

In a free-response exercise, the respondents declared whatever they considered unique about Kerrville and/or whatever they perceived to be the area's source(s) of greatest appeal. The primary (codified) responses are shown below. For the most part, the answers reflected *inherent* rather than *introduced* traits—such as the area's topography, the scenery, and the quaintness of the city as it exists today. To succeed, development must resonate with or reinforce these themes while neither displacing nor diminishing the charms that clearly distinguish the region already.

➢ ***"WHAT IS UNIQUE ABOUT KERRVILLE? WHAT IS MOST TO LIKE?"***

- *Pretty location/landscape/ scenery:* ***30%***
- *Small town/Country town/Not busy/Quaint:* ***19%***
- *Hill country:* ***18%***
- *River:* ***10%***
- *Shops:* ***8%***
- *Friendly/nice people:* ***8%***
- *Accessibility/Location/Ease of getaway/Nearby attractions:* ***7%***
- *Attractions (Museums/James Avery/Hunting/Etc.):* ***6%***
- *Climate/Nice weather:* ***5%***
- *Festivals (Folk festival/Food festivals/Etc.):* ***4%***
- *Dining:* ***3%***
- *Other:* ***17%***



➢ ***SIGNIFICANT SUB-GROUP OBSERVATIONS:***

- Kerrville's *pretty location/landscape/scenery* was more likely to be noted by *females* (**35%**) than by *males* (**24%**).
- *Austinites* were more likely than any other respondents (at **12%** mention) to characterize Kerrville as unique for its *Festivals (Folk festival/Food festivals/Etc.).*
- *"Hill country"* was more likely to be volunteered as a descriptor by persons with *a college degree or higher education* than by those with *less than a college degree* (**24%** vs. **12%**).

- Finally, on many variables, past *visitors* to Kerrville were *significantly* more likely to describe the area in ways that were less likely to be volunteered by *non-visitors:*

"KERRVILLE" DESCRIPTOR	AS VOLUNTEERED	
	BY VISITORS (H)	BY NON-VISITORS (K)
Hill country	20% k	11% h
Small town/Country town/Not busy/Quaint	21% k	12% h
"Shops"	10% K	2% H
"Dining"	4% k	-- h
Attractions (Museums/James Avery/Hunting/Etc.)	7% k	1% h

Given the breadth of this question, it was inevitable that many volunteered descriptors would defy being easily rolled up into summary codes. Eighty-seven respondents (**17%** of the total) gave answers or described Kerrville in ways that defied summarization. Below is a sampling that captures the flavor of the descriptions.[4] It is apparent from these comments that Kerrville enjoys an extraordinary fondness as it exists today.

- I guess it is a unique part of the State and attractive geographically
- I like the location, I like the stuff around it; like the lake and river; camping
- It is a beautiful area and a bohemian place to attract musicians
- Love everything about Kerrville; love the weather
- At the time I liked my family's ranch; James Avery had his jewelry store; kids to be around farm animals and exotic animals; and to fish for bass
- It's a small town in the hill country; it's a nice getaway from the big city; I have friends there and like to visit them
- For me, it is just the atmosphere—that is really the main reason we go; my wife likes it; I like just the quantness of the town
- Its beauty and the uniquenss and the quaintness
- It's a tourist town that is small and clean; they have the trade shows that draw in tourists
- Scenery and quaintness and good camping spots
- The river; the peaceful atmosphere
- Been around Kerrville since 1930; it is still different from the rest of Texas but not as different as it used to be; good scenery and good people
- There are lots of deer for hunting; to visit kids at camp
- It's a very pretty location next to the river; it's nice and clean; it's just a very pleasant town to visit

[4] The Data Tables section lists all of the comments.

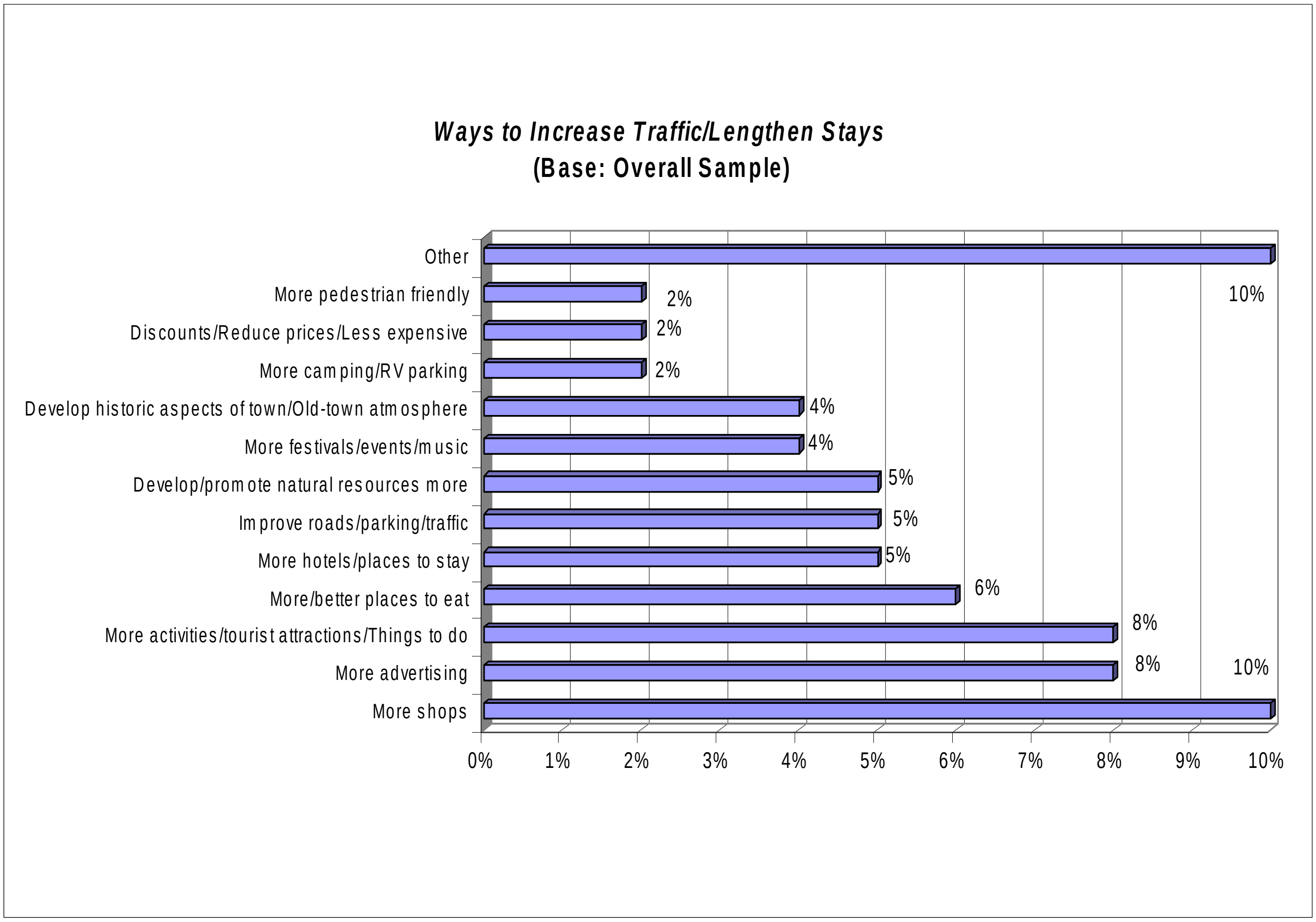
SUGGESTIONS TO INCREASE VISITOR TRAFFIC OR LENGTHEN VISITOR STAYS

Prior to testing the appeal of given development program elements, the interview elicited from respondents—in another free-response exercise—*general suggestions* as to how Kerrville might increase visitor traffic or lengthen the average visitor stay. The answers were more or less evenly distributed across a variety of generic responses—such as expanding retail, adding tourist attractions and new places to stay, and introducing unique events. Also considered important was preserving and promoting aspects of Kerrville that already draw visitors—such as the natural beauty and history of the area. A substantial proportion (**11%**) even asked that the area not change from what it is now.

➢ ***IDEAS TO INCREASE VISITOR TRAFFIC/LENGTHEN VISITOR STAYS:***

- *More shops: **10%***
- *More advertising: **8%***
- *More activities/tourist attractions/Things to do: **8%***
- *More/better places to eat: **6%***
- *More hotels/places to stay: **5%***
- *Improve roads/parking/traffic: **5%***
- *Develop/promote natural resources more: **5%***
- *More festivals/events/music: **4%***
- *Develop historic aspects of town/Old-town atmosphere: **4%***
- *More camping/RV parking: **2%***
- *Discounts/Reduce prices/Less expensive: **2%***
- *More pedestrian friendly: **2%***
- *Like it the way it is/Stay the same: **11%***
- *Other: **10%***

SUGGESTIONS TO INCREASE VISITOR TRAFFIC OR LENGTHEN VISITOR STAYS—*CONTINUED*



➢ ***SIGNIFICANT SUB-GROUP DIFFERENCES:***

- ***Females*** *suggested "more shops" significantly more often than did* ***males****:* ***13%*** *vs.* ***7%***
- *Respondents living in* ***San Antonio (15%)*** *and* ***Houston (16%)*** *wanted "more shops" more often than did those living in* ***Dallas (5%)*** *or the* ***Rest of Texas (5%).***
- *Respondents from* ***Houston*** *wanted "activities/tourist attractions/things to do" more often than did respondents from* ***Austin*** *(****13%*** *vs.* ***5%****).*
- *Respondents with* ***children at home*** *were more likely than* ***households without children*** *to opt for "activities/tourist attractions/Things to do"****—12%*** *vs.* ***6%****.*

SUGGESTIONS TO INCREASE VISITOR TRAFFIC OR LENGTHEN VISITOR STAYS—*CONTINUED*

Here is a sampling of some of the "other" comments that were volunteered; the full list can be found within the Data Tables section. (Especially salient remarks have been shaded):

• Add more amusement; like an amusement park; more restaurants; opportunities for businesses
• Advertising and I guess maybe some of the big city features
• Do not turn to a tourist trap; cultural activities; restaurants; keep quality up; do not do what Fredericksburg has done
• I heard it has been around for a while and I think they should talk about making a square; like the festival
• Make their downtown area more attractive.
• Probably come up with something unique that other towns don't have
• I would capitalize on the hill country type of living model; more southern cooking restaurant and river activites and hunting; more old town type of stuff
• Just make it look more interesting I suppose; the look of it; I like places like that; places with stores you can't find in a populated area
• It has been a number of years since I've been down there so I'm sure things have changed; they could add more shopping and improve the school facilities
• The wine industries; tourism
• I like to see old home touring; enhance their parks or maybe around the river
• Make sure there are bike lanes
• They could maybe advertise more; the parade downtown was neat; most people tend to drive around the town; there are not a lot of signs to give good directions
• More businesses and more restaurants and spas
• Having it a getaway is nice; old time Texas; liked how it was; nice to be able to shop and walk; river was pretty
• Create more than a one street shopping area; add more store fronts; free helicopter rides
• Lot of empty lots that could be used for businesses or houses; develop the Guadalupe more!
• They have great places to eat that are not chains, and all the bed and breakfasts; please don't make it like other large towns
• They need to make it more pedestrian friendly and build a square like the downtown area; make more bars and pubs
• They need to put more shops in the shopping center; they have a little downtown area
• If they have festivals and stuff because people like those; annually where people would get used to going at that time of the year; have the old time roads and street lamps and fresh hanging flower baskets
• Bring more little shops and make it more attractive
• I would say develop a small town feel with a walking accessibility to shops or entertainment with a German flavor
• Kerrville's a country town and that's the image they have; give discounts at hotels to get people to come down there
• To keep a small town friendly atmosphere
• I think they're on the right track if they do that [development]; everything but the town is the reason to be there for the river and for camping
• More camping and parking and cabins; be more motorcycle friendly, more venues
• Need standard building code for downtown; better shopping; do not utilize river as they should
• More quaintness

SUGGESTIONS (RETAILERS) TO ATTRACT VISITORS OR LENGTHEN STAYS

The interview sought to elicit from respondents *retail categories or specific retailer names* with the potential to increase visitor traffic to Kerrville or else lengthen the average visitor stay. Importantly, two out of three respondents (**65%**) were unable to contribute a suggestion *("no/none").* The eclectic answers were fragmented or generic for the most part.

➢ ***RETAIL CATEGORY/RETAILER IDEAS TO INCREASE VISITOR TRAFFIC:***

- *Specific stores/restaurants: **5%***
- *Local restaurants: **5%***
- *Ethnic restaurants/German/ Mexican/Chinese restaurants: **3%***
- *Local establishments (non-specific): **3%***
- *More restaurants/dining (non-specific): **3%***
- *More chains/well-known restaurants/stores: **2%***
- *High-end/upscale dining/retail: **2%***
- *Local retail: **2%***
- *Casual dining/Family-style dining: **2%***
- *Steak houses: **2%***
- *Barbecue restaurants: **1%***
- *Seafood restaurants: **1%***
- *Mall/Shopping center: **1%***
- *Other: **10%***

There was a strong, general sentiment to keep the Kerrville retail landscape from being marred by a large influx of national chain outlets, and a corresponding emphasis on fostering local and one-off independent shops. Well known chain names (listed below) were suggested nonetheless, if only [presumably] for the security of having access to known offerings, or else to assure the overall comprehensiveness of local shopping.

SUGGESTIONS (RETAILERS) TO ATTRACT VISITORS OR LENGTHEN STAYS—*CONTINUED*

- Central Market
- Cheesecake Factory
- Chick-Fil-A
- Chili's (7 mentions)
- County Line
- Cracker Barrel (2 mentions)
- CVS
- Dillard's (4 mentions)
- Gap
- Golden Corral
- HEB (3 mentions)
- IHOP
- James Avery (2 mentions)
- Jim's
- Joe's Crab Shack
- Johnny Carino's
- Kohl's
- La Madeline's French Bakery
- Lane Bryant
- Lowes
- Luby's (2 mentions)
- Macy's (5 mentions)
- New York and Company
- Nordstrom's
- Old Navy
- Olive Garden
- Outback Steakhouse
- Panda Express
- Pappacita's (2 mentions)
- Pappadeaux (2 mentions)
- Penny's
- Red Lobster
- Salt Licks
- Sam's Club
- Sears
- Starbucks (3 mentions)
- Super Target
- Target
- Texas Road House (3 mentions)
- The Tic-Tac Club
- Walgreen's
- Wal-Mart
- Whole Foods

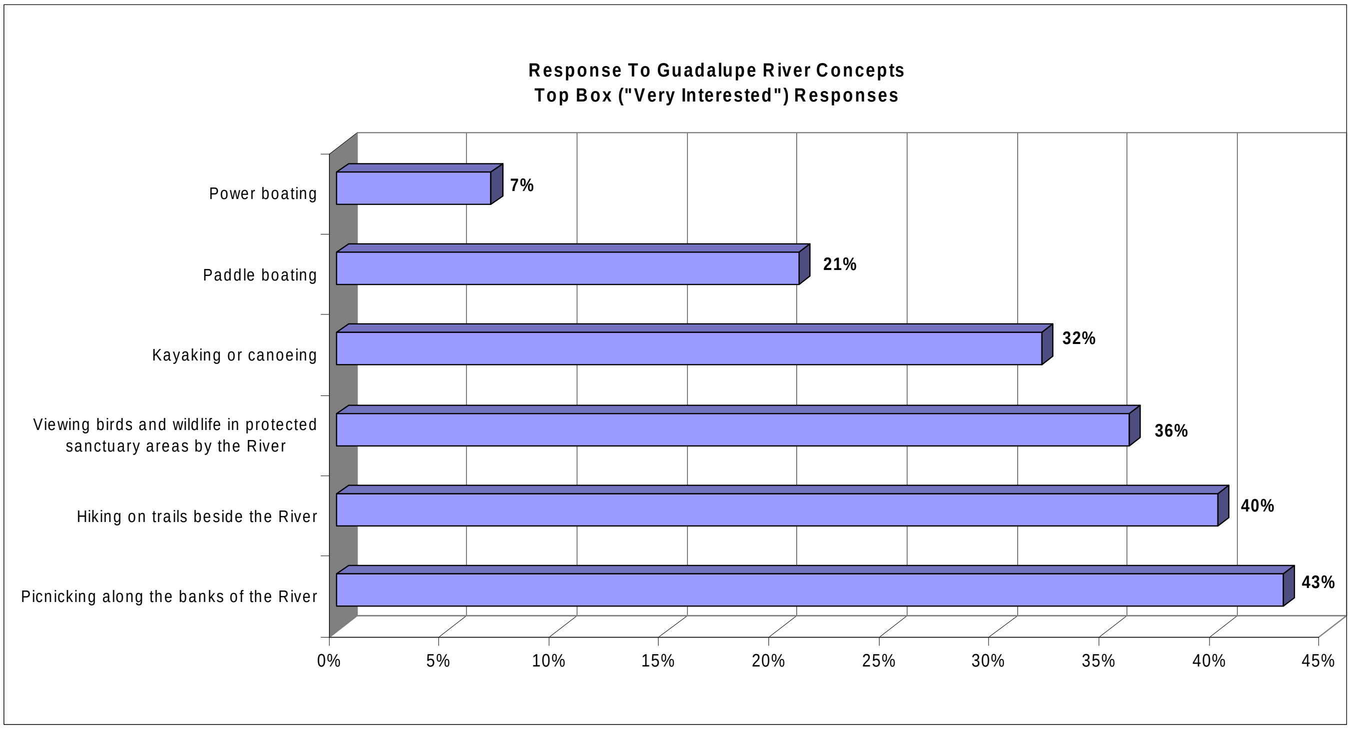
RESPONSE TO GUADALUPE RIVER RECREATIONAL USE CONCEPTS

A half dozen actual or potential recreational uses for the *Guadalupe River* were tested for the level of consumer interest that each might inspire. For each idea, the response range was "*Very Interested*" to *"Not at all Interested."*

Four of the applications attained Top Box or "*Very Interested*" scores between **32%** and **43%—** that is, among at least one in three respondents. Three of these ideas were activities that could be pursued at a languid pace alongside the river with seemingly no impact on the River itself or the sanctuary ambiance of the environment. The fourth activity that generated reasonable interest—***kayaking or canoeing***—would also seem to have only a modest impact on visitor enjoyment.

- ***"Picnicking along the banks of the River"*** *(**43%** were "Very Interested")*
- ***"Hiking on trails beside the River"*** *(**40%** Top Box)*
- ***"Viewing birds and wildlife in protected areas" (36%)***
- ***"Kayaking or canoeing" (32%)***

The activities most likely to be distracting or disruptive—***paddle boating*** and especially **power boating**—generated the least interest.



RESPONSE TO GUADALUPE RIVER RECREATIONAL USE CONCEPTS—*CONTINUED*

Whether expressed in terms of Top Box scores (above) or Mean interest scores[5] (below), the observed appeal-ranking of the six river concepts remained consistent:

➢ *MEAN "INTEREST" SCORES:*

CONCEPT	MEAN INTEREST SCORES
Picnicking along the banks of the River	2.36 (Highest)
Hiking on trails beside the River	2.24
Viewing birds and wildlife in protected areas	2.15
Kayaking or canoeing	2.00
Paddle boating	1.89
Power boating	1.32 (Lowest)

➢ *SUB-GROUP DIFFERENCES (BASED ON "VERY INTERESTED" SCORES):*

- *Females* were significantly more interested than *males* in two of these activities:

ACTIVITY	TOP BOX SCORES	
	MALES (A)	FEMALES (B)
"Paddle boating"	16% B	25% A
"Picnicking along the banks of the river"	38% b	47% a

- Several concepts favored the youngest age cell over the older age cells:

ACTIVITY	AGE CELLS (TOP BOX %'S)		
	UNDER 35 (L)	35 TO 54 (M)	55+ (N)
"Paddle boating"	37% mN	21% l	18% L
"Picnicking along the banks of the river"	63% N	48% n	36% Lm
"Kayaking or canoeing"	53% N	39% N	22% LM
"Power boating"	18% N		5% L
"Hiking on trails beside the River"	63% mN	44% lN	32% LM

- Finally, *households with children* gave significantly higher Top Box scores to *"kayaking or canoeing"* than did *households without children* (**39%** vs. **27%**).

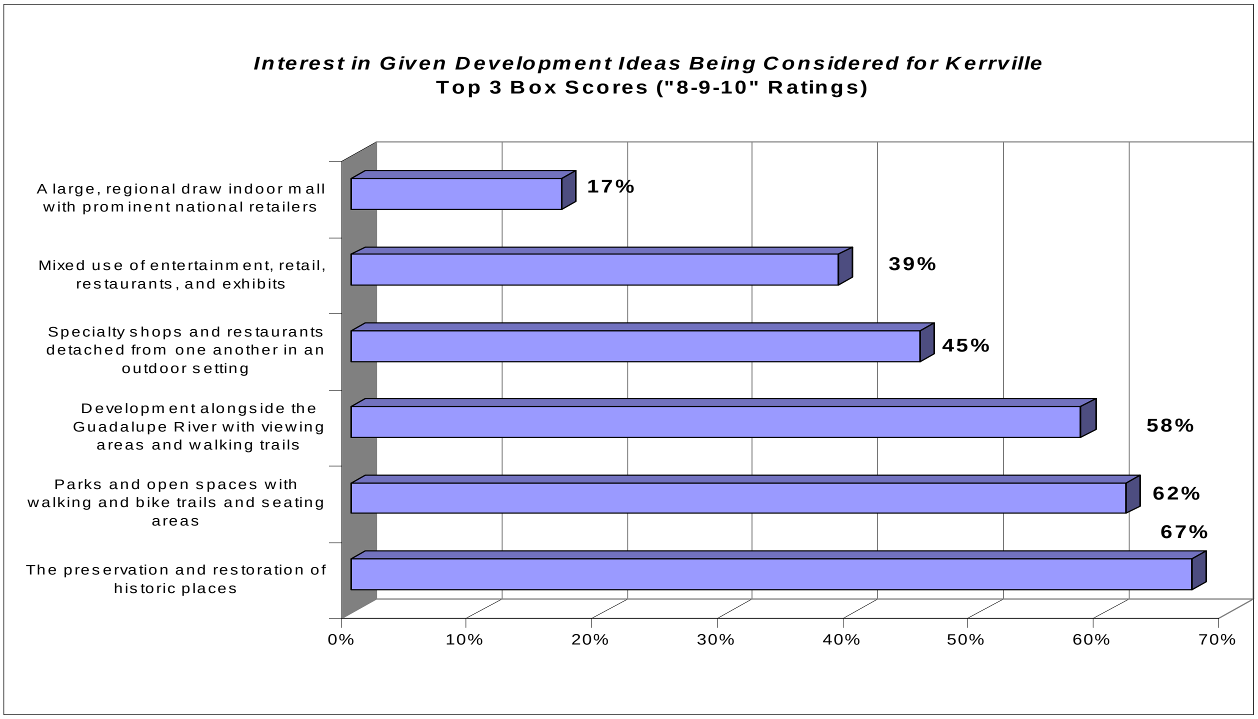
[5] 1.0 = "Not at all Interested" to 4.0 = "Very Interested"

APPEAL OF GIVEN DEVELOPMENT IDEAS BEING CONSIDERED FOR KERRVILLE

Six major ideas under consideration were tested for their overall appeal using a "1" to "10" scale.[6] Any one of the ideas, if executed, would conceivably establish the character or set the tone for Kerrville's development. The table and chart below show how each idea fared based on the combined Top Three box scores (i.e., the "8-9-10" scores).

➢ ***COMBINED "8-9-10" SCORE PERCENTAGES:***

DEVELOPMENT IDEAS	% OF RESPONDENTS (8-9-10)
The preservation and restoration of historic places	67%
Parks and open spaces with walking and bike trails . . .	62%
Development alongside the Guadalupe River with viewing areas . . .	58%
Specialty shops and restaurants detached from one another . . .	45%
Mixed use of entertainment, retail, restaurants, and exhibits	39%
A large, regional draw indoor mall with prominent national retailers	17%



[6] The scale ranged from 1.0 ("Not at all Appealing") to 10.0 ("Very Appealing").

APPEAL OF GIVEN DEVELOPMENT IDEAS BEING CONSIDERED FOR KERRVILLE—*CONTINUED*

The mean scores on the “1” to “10” appeal ratings (below) produced the same order of finish of these concepts. Notwithstanding the importance of a vital retail presence, the respondents favored development that would emphasize the “natural,” while preserving the charm and history that define Kerrville right now:

- √ *The preservation and restoration of historic places*
- √ *Parks and open spaces with walking and bike trails . . .*
- √ *Development alongside the Guadalupe River with viewing areas . . .*

➢ ***MEAN “APPEAL” SCORES:***

DEVELOPMENT IDEAS	“APPEAL” MEAN
The preservation and restoration of historic places	7.95
Parks and open spaces with walking and bike trails . . .	7.57
Development alongside the Guadalupe River with viewing areas . . .	7.41
Specialty shops and restaurants detached from one another . . .	6.80
Mixed use of entertainment, retail, restaurants, and exhibits	6.52
A large, regional draw indoor mall with prominent national retailers	4.02

As for shopping, the respondents stated that they clearly wanted *detached specialty shops and restaurants* and *mixed use development* over the alternative of *a large regional draw mall*.

* * * * *

- ***SIGNIFICANT SUB-GROUP DIFFERENCES (TOP BOX "10" SCORES):***
  - ***Males and females*** *departed significantly in their attitudes toward certain concepts; females in every case expressed stronger interest than males:*

CONCEPT	"10" ("VERY APPEALING") RATINGS:	
	MALES (A)	FEMALES (B)
"A large, regional draw indoor mall with prominent national retailers"	6% b	11% a
"Parks and open spaces with walking and bike trails and seating areas"	23% b	32% a
"The preservation and restoration of historic places"	30% B	43% A
"Development alongside the Guadalupe River with viewing areas and walking trails"	23% b	33% a
"Specialty shops and restaurants detached from one another in an outdoor setting"	13% b	20% a

- ***The markets themselves*** *were also significantly different in their responses to the concepts:*
  - ***San Antonio*** *and* ***Houston*** *reacted more favorably to* ***"A large, regional draw indoor mall with prominent national retailers"*** *than did* ***Austin*** *and* ***Dallas****.*
  - ***Houston*** *reacted more favorably than* ***Austin*** *to* ***"Development alongside the Guadalupe River with viewing areas and walking trails."***
  - *With respect to* ***"Specialty shops and restaurants detached from one another . . .":***
    - √ ***Houston*** *reacted more favorably than* ***Austin, Dallas,*** *&the* ***Rest of Texas***
  - *With respect to* ***"Mixed use of entertainment, retail, restaurants, and exhibits"****:*
    - √ ***San Antonio*** *reacted more positively than did* ***Austin***
    - √ ***Houston*** *reacted more favorably than* ***Austin*** *and* ***Dallas***
    - √ ***The Rest of Texas*** *reacted more favorably than did* ***Austin*** *or* ***Dallas***

- These market-level differences are quantified below:

CONCEPT	“10” (“VERY APPEALING”) RATINGS:				
	SAN ANTONIO (C)	HOUSTON (D)	AUSTIN (E)	DALLAS (F)	REST OF TEXAS (G)
“A large, regional draw indoor mall with prominent national retailers”	12% **Ef**	16% **EF**	2% **CDg**	4% **cD**	9% **e**
“Development alongside the Guadalupe River with viewing areas and walking trails”	31%	38% **efG**	24% **d**	25% **d**	21% **D**
“Specialty shops and restaurants detached from one another in an outdoor setting”	18%	26% **Ef**	10% **D**	12% **d**	17%
“Mixed use of entertainment, retail, restaurants, and exhibits”	16% **e**	21% **Ef**	7% **cDG**	10% **dg**	20% **Ef**

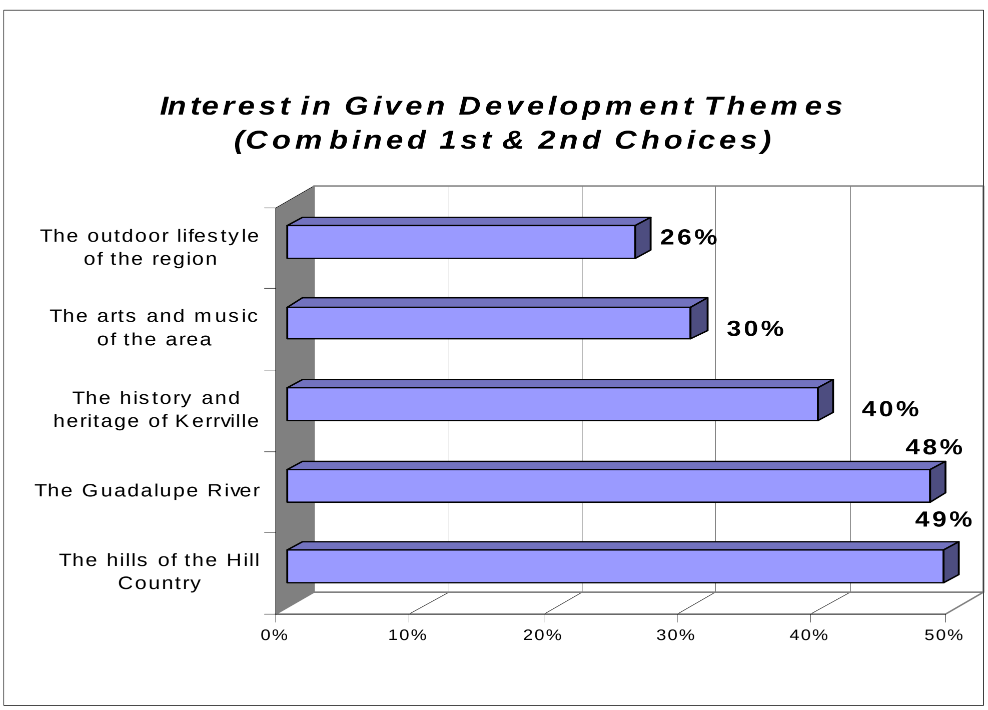
- Two significant *age-based differences* were also observed, in each case favoring the youngest age cell:
  - ***“A large, regional draw indoor mall with prominent national retailers”*** was significantly preferred by respondents *under 35* (**18%**) compared to those who were *35 to 54* **(7%).**
  - ***“Mixed use of entertainment, retail, restaurants, and exhibits”*** was significantly preferred by respondents *under 35* (**29%**) compared to those who were *35 to 54* (**15%**) and those who were *55+* (**12%**).
- ***“The preservation and restoration of historic places”*** was significantly preferred by *households without children* (**41%**) over *households with one or more children* (**31%**).
- ***“Specialty shops and restaurants detached from one another in an outdoor setting”*** were significantly preferred by respondents with *some college or lower education* **(20%)** over respondents with a *college degree or higher education* **(14%).**

Interest In Given Development Themes To Create Visitor Interest

Five overarching themes are being considered by the developers in order to draw traffic to the area by inspiring visitor interest and creating differentiation based on the uniqueness, history, and/or location of Kerrville. The most salient theme will presumably be executed as a Kerrville "brand" in advertising and promotions. It could also be manifested through museums and art galleries, architectural restorations, scenic vistas, historical re-creations, or area landmarks. Each of the five was tested for its general appeal—that is, first choice and second choices were captured.

THEMES	PREFERRED THEMES (% OF RESPONDENTS)		
	1ST CHOICE	2ND CHOICE	COMBINED 1ST/2ND CHOICES
"The hills of the Hill Country"	29%	21%	49%
"The Guadalupe River"	22%	27%	48%
"The history and heritage of Kerrville"	19%	21%	40%
"The arts and music of the area"	16%	15%	30%
"The outdoor lifestyle of the region"	11%	15%	26%

➢ ***OBSERVATION: COMBINED 1ST/2ND CHOICE THEMES***



INTEREST IN GIVEN DEVELOPMENT THEMES TO CREATE VISITOR INTEREST—*CONTINUED*

For the sample as a whole, and taking into account the first and second-choice elections combined, *"The Hills of the Hill Country"* and *"The Guadalupe River"* were the preferred themes.

The only significant sub-group observations applied to first choice preferences for *"The History and Heritage of Kerrville"—females* and the *oldest age cell* stood apart:

- Females (**23%**); males (**14%**)
- Age 35 to 54 **(13%)**; age 55+ **(24%)**

General Appeal Of A Downtown Kerrville Residential Lifestyle

One creative idea under consideration is a **residential development** in downtown Kerrville for people who might want to work from their home, or commute from the area, or who might want to retire to the area. These residences might include apartments, townhomes, or condominiums. The respondents were asked to consider the *general appeal* of the idea regardless of their present life-stage—such as the lifestyle that it might entail under the appropriate circumstances. The response opportunities ranged from "*Very Appealing*" (weighted 4.0) to "*Not at all Appealing*," weighted 1.0.

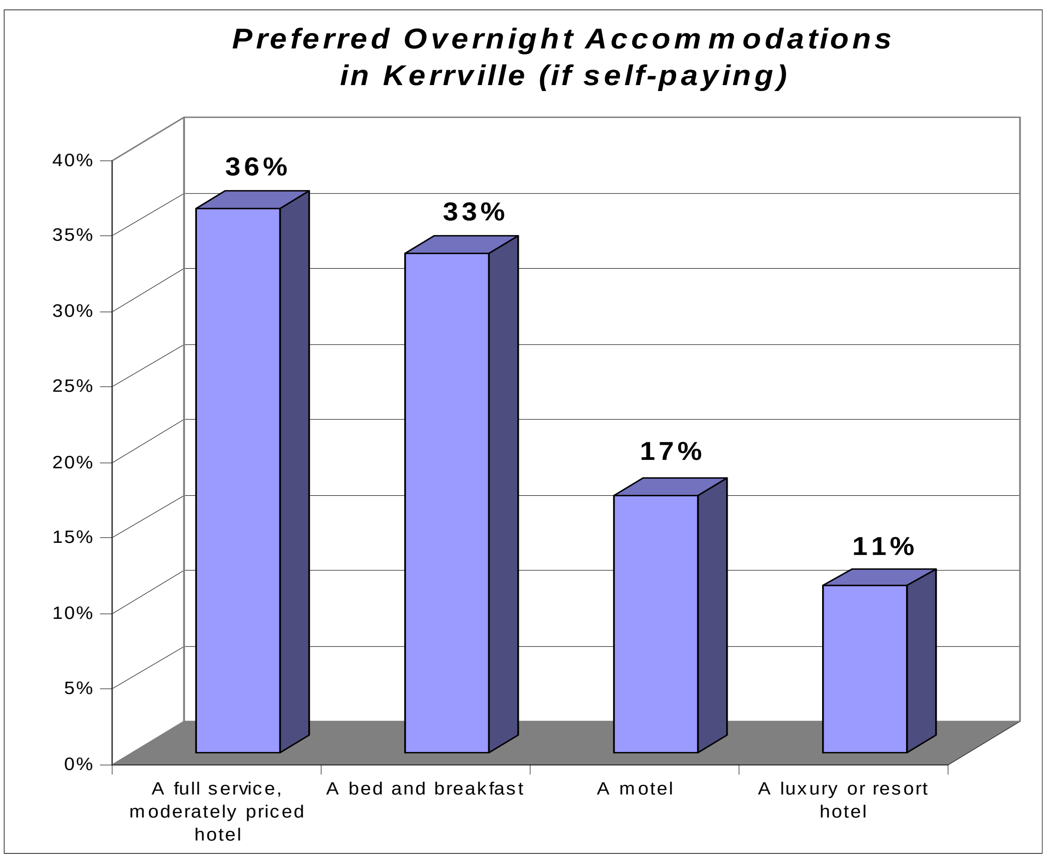
Only **16%** gave the idea a Top Box ("*Very Appealing*") rating. The mean rating was **2.56**, or mid-way between "*Not Very Appealing*" and "*Somewhat Appealing*." Based on the Top Box observation, there were no statistically significant differences across the sub-groups.

PREFERRED OVERNIGHT ACCOMMODATIONS IN KERRVILLE (SELF-PAY)

If and when they were to stay in Kerrville overnight (and if they were paying on their own), one respondent in three (**36%**) said that their lodging preference would be *a full service, moderately priced hotel.* A comparable proportion (**33%**) said they would opt for *a bed and breakfast.* After that, there was a substantial fall-off to a *motel* (**17%**), then finally *a luxury or resort hotel* (only **11%**).

➢ ***PREFERRED OVERNIGHT ACCOMMODATIONS IN KERRVILLE:***

PREFERRED ACCOMMODATIONS	% OF OVERALL SAMPLE
A full service, moderately priced hotel	36%
A bed and breakfast	33%
A motel	17%
A luxury or resort hotel	11%



PREFERRED OVERNIGHT ACCOMMODATIONS IN KERRVILLE (SELF-PAY)—*CONTINUED*

- ***SIGNIFICANT SUB-GROUP DIFFERENCES:***
    - *A bed and breakfast* was significantly preferred by ***Austinites*** (**45%**) over respondents from ***San Antonio*** (**31%**), ***Houston*** (**30%**), or the ***Rest of Texas*** (**27%**). The same was true in a comparison of *college grads* (**40%** of whom preferred *a bed and breakfast)* over those educated with *less than a college degree* (**25%**).
    - *A motel* was significantly preferred for overnight lodging by respondents who were *55 or older* (**23%**) compared to those who were *age 35 to 54* (**9%**). *A motel* was likewise significantly preferred by those with *less than a college degree* (**20%**) compared to *college degree holders* (**14%**).
    - Finally, a *Full Service, Moderately Priced Hotel* was significantly preferred by persons educated *below a college degree* **(42%)** compared to those with *at least an undergraduate degree* **(31%).**

CLASSIFICATION AND DEMOGRAPHICS

➢ *RECENT CULTURAL EXPOSURE*

Six in ten responding households (**58%**) had been to a *museum* in the past half-year. About half (**46%**) had been to a *concert.* Almost as many (**43%**) had attended *live theatre* during that time.

CULTURAL EXPOSURE (PAST SIX MONTHS)	% OF OVERALL SAMPLE
Any museums	58%
Any concerts	46%
Any live theatre	43%

Significant sub-group observations were the following:

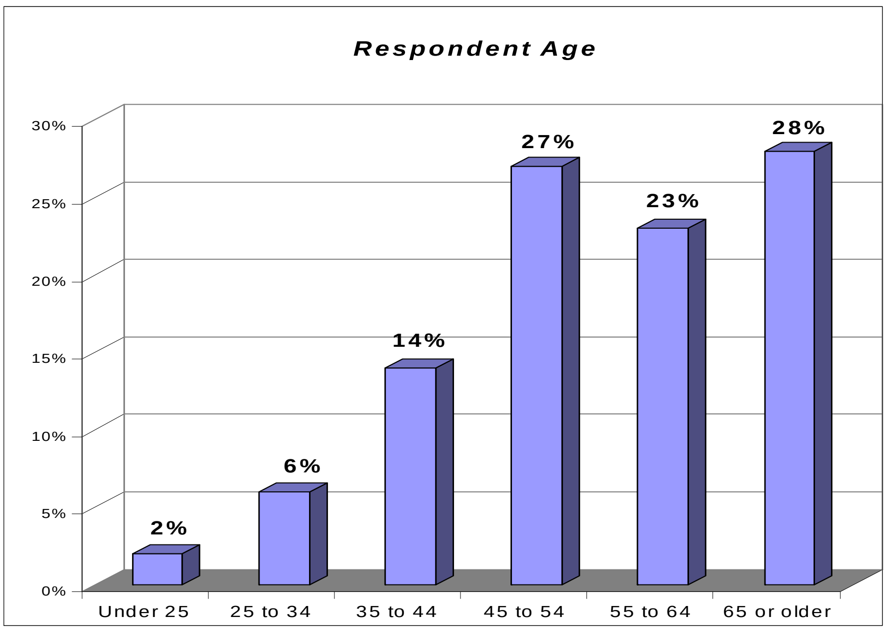
- **With respect to live concert attendance:**
  - **59%** of ***Austinites*** had been to a *live concert* compared to **30%** of those from ***San Antonio*** and **45%** of those from ***Houston***.
  - Half the ***Dallas*** sample **(50%)** had been to a recent *concert*; this was higher than the ***San Antonio*** observation **(30%).**
  - The **46%** from the ***Rest of Texas*** who had been to a *concert* was also higher than the ***San Antonio*** observation **(30%).**
  - More respondents ***under 3***5 had been to a *concert* **(61%)** than those ***55+*** **(39%).**
  - More respondents ***35 to 54*** had been to a *concert* **(52%)** than those ***55+*** **(39%).**
  - Respondents with ***less than a college degree*** were less likely to have been to a *live concert* **(37%)** than those with ***at least an undergraduate degree*** **(54%)**.
- **With respect to live theatre attendance:**
  - Significantly fewer respondents who were ***less than college grads*** had been to a *live theatre performance* **(31%)** than those who were ***at least college grads*** **(55%)**
- **With respect to museum attendance:**
  - ***Less than college grads*** **(46%)** were less likely to have been to a *museum* compared to ***college graduates*** **(68%)**.

➢ *VACATION HOME OWNERSHIP*

For the sample as a whole, **20%** or one in five said they have a full-time or part-time vacation home. There were no significant contrasts by sub-group.

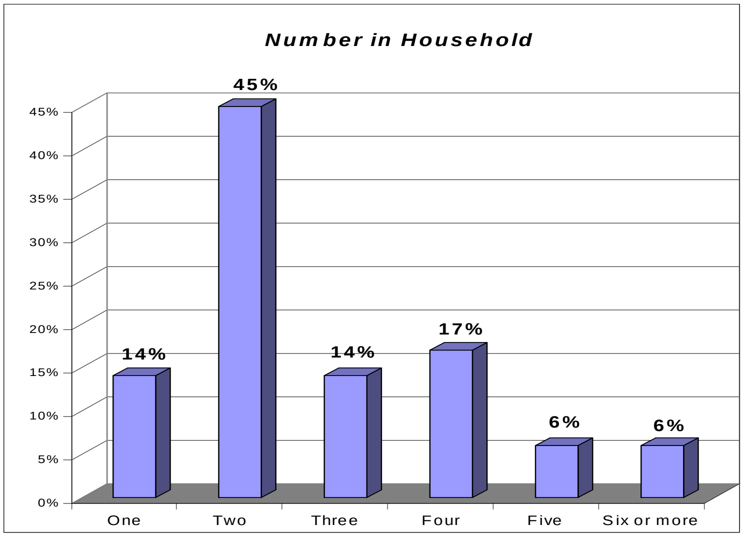
➢ *RESPONDENT AGE*

As many respondents were *45 to 54 years of age* (**27%**) as were *65 or older* (**28%**). The median age of the sample was 56.



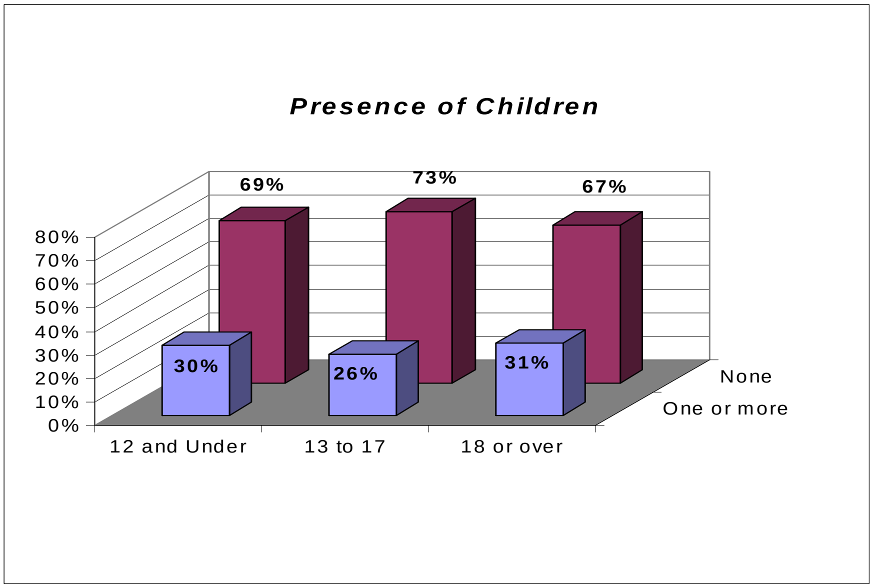
➢ *HOUSEHOLD SIZE*

Nearly half the sample **(45%)** came from households with two members—helped no doubt by the presence of Empty Nester households. The same proportion (**43%**) had at least one child at home.



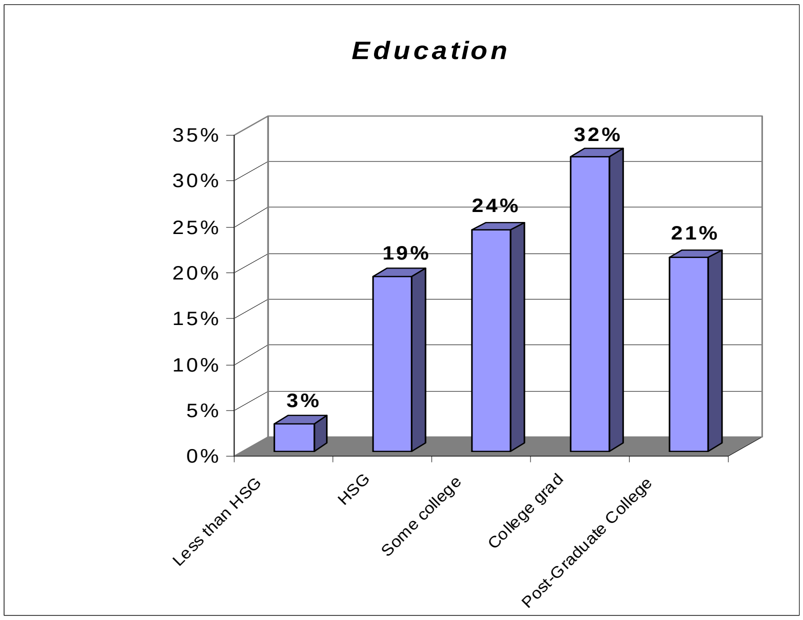
➢ *PRESENCE OF CHILDREN*

Children in each of three age intervals (*12 and under, 13 to 17, 18 or over*) were represented roughly the same across the sample. That is, **30%** had at least one child *12 and under*; **26%** had a child *13 to 17*; and **31%** had at least one child who was *18 or over*.



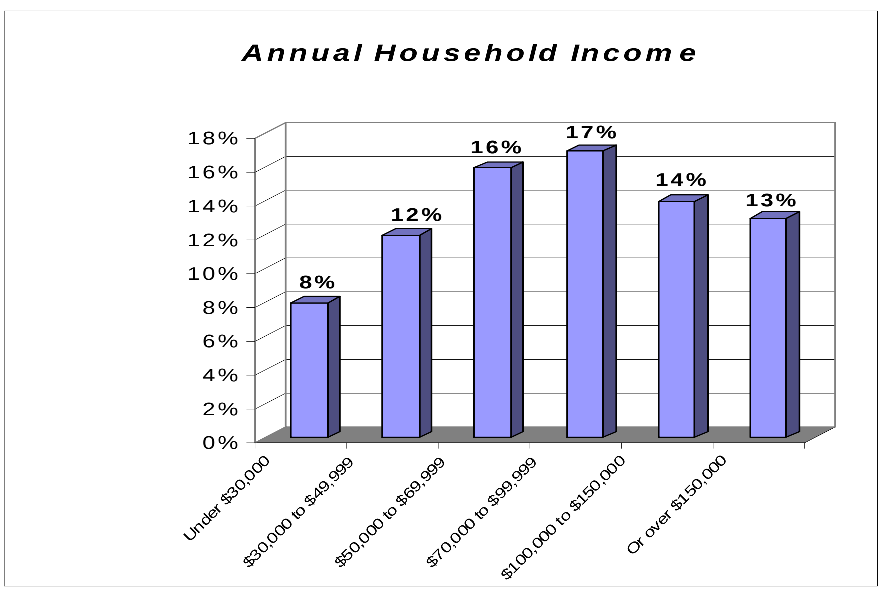
➢ *RESPONDENT EDUCATION*

The sample was highly educated. Half (**53%**) had graduated from college, including **21%** who claimed advanced degrees.



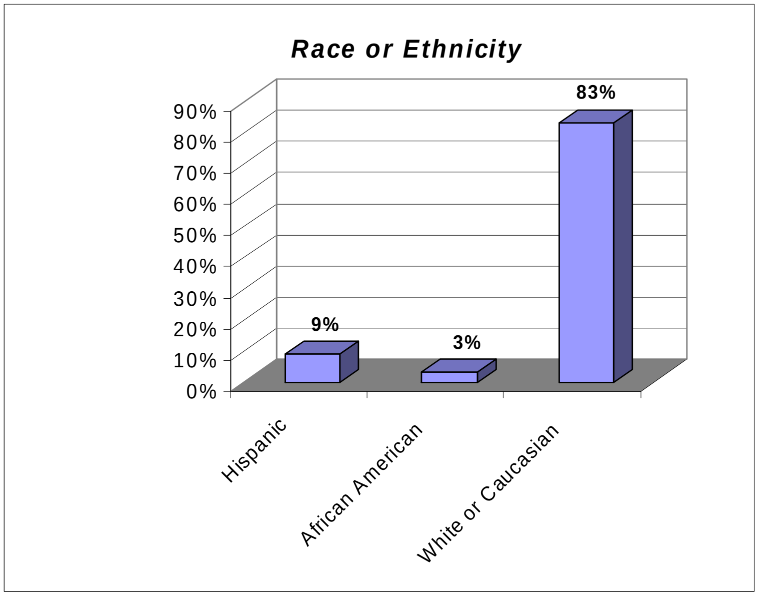
➢ *ANNUAL HOUSEHOLD INCOME*

The sample was also affluent. One in four (**27%**) claimed an income of *$100,000 or more,* including **13%** who had an income of *at least $150,000.*



➢ ***RACE OR ETHNICITY***

The sample was predominantly *white or Caucasian*. *Hispanics* and *African Americans* represented only **9%** and **3%**, respectively, of the audience. *Asians* comprised less than ½ of one percent.



*   *   *   *   *

In summary, this research has provided guidance that should help to steer the development of Kerrville in directions that are responsive to the reasons why the area has been a magnet for in-state visitors to this point. It has also made clear the importance of preserving the area's inherent sources of natural charm and appeal despite the man-made changes that are forthcoming.