OREGON WINERY VISITOR PROFILE

Umpqua Valley Data Appendix

October 2019

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Survey Logic

Initial Survey Flow

Survey Respondent Groups

		Non-Residents	Residents
Winery Visitors	Recent Visitors	**A1.** Non-Resident: Visited in past year • Part 1: About your trip • Part 2: Trip motivation & satisfaction • Part 3: Perceptions of Wine Regions • Part 4: About you	**A2.** Resident: Visited in past year • Part 1: About your trip • Part 2: Trip motivation & satisfaction 　• Q13, Q16 – Q22 • Part 3: Perceptions of Wine Regions • Part 4: About you
	Past Visitors	**B1.** Non-Resident: Visited more than 1yr ago • Part 1: Trip motivation & satisfaction 　• All Qs (slightly modified) • Part 2: Perceptions of Wine Regions • Part 3: About you	**B2.** Resident: Visited more than 1yr ago • Part 1: Trip motivation & satisfaction 　• Q13, Q16 – Q22 (slightly modified • Part 3: Perceptions of Wine Regions • Part 4: About you
Non - Winery Visitors	Region Visitors	**C1.** Non-Resident: Not Visited a Winery • Part 1 (Non-winery visitors): Barriers to Visiting • Part 2: Trip motivation & satisfaction 　• Q13 – Q15, Q18, Q19, Q21, Q22 • Part 3: Perceptions of Wine Regions • Part 4: About you	**C2.** Resident: Not Visited a Winery • Part 1 (Non-winery visitors): Barriers to Visiting • Part 2: Perceptions of Wine Regions • Part 3: About you
	Non-Region Visitors	**D1.** Non-Resident: Not Visited Region • Part 1 (Non-visitors): Barriers to Visiting • Part 2: Perceptions of Wine Regions • Part 3: About you	

Umpqua Valley Region Survey Responses

Screener Questions

SQ2 - Have you ever spent time in the Umpqua Valley? Please refer to the map below to see the Umpqua Valley boundaries. (n=802)
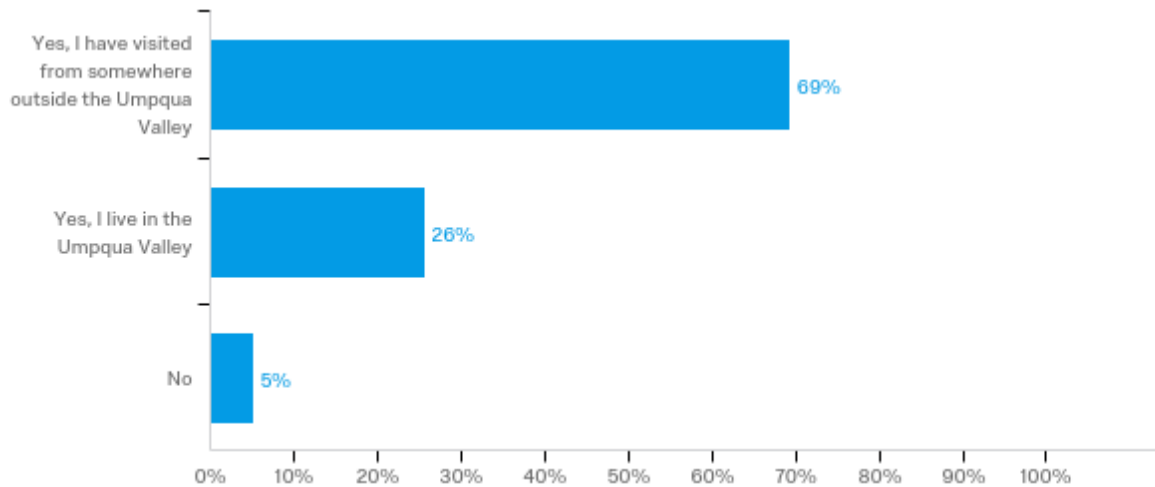
Answer	Count
Yes, I have visited from somewhere outside the Umpqua Valley	556
Yes, I live in the Umpqua Valley	207
No	39
Total	**802**

SQ2B - How long ago was your most recent visit? (n=554)
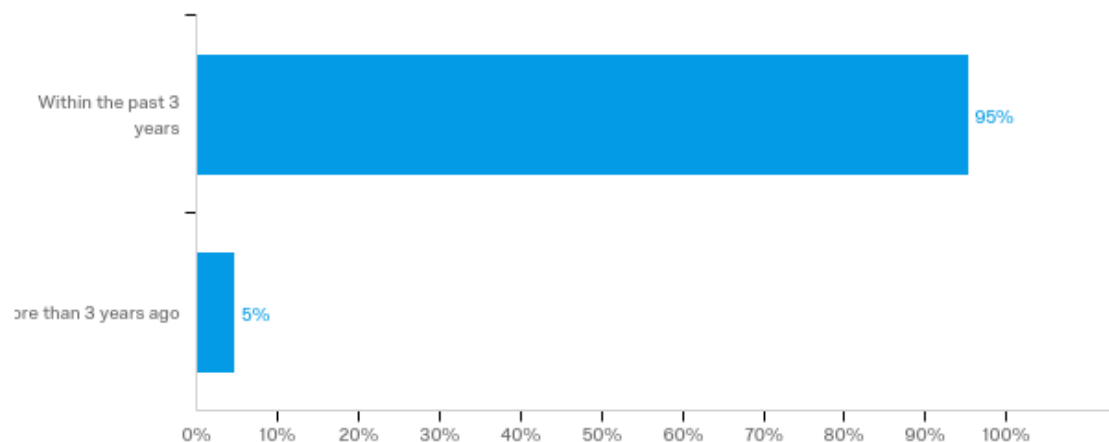
Answer	Count
Within the past 3 years	528
More than 3 years ago	26
Total	**554**

SQ3 - Have you ever visited a winery tasting room for the purpose of tasting or buying wines in the Umpqua Valley? (n=736)
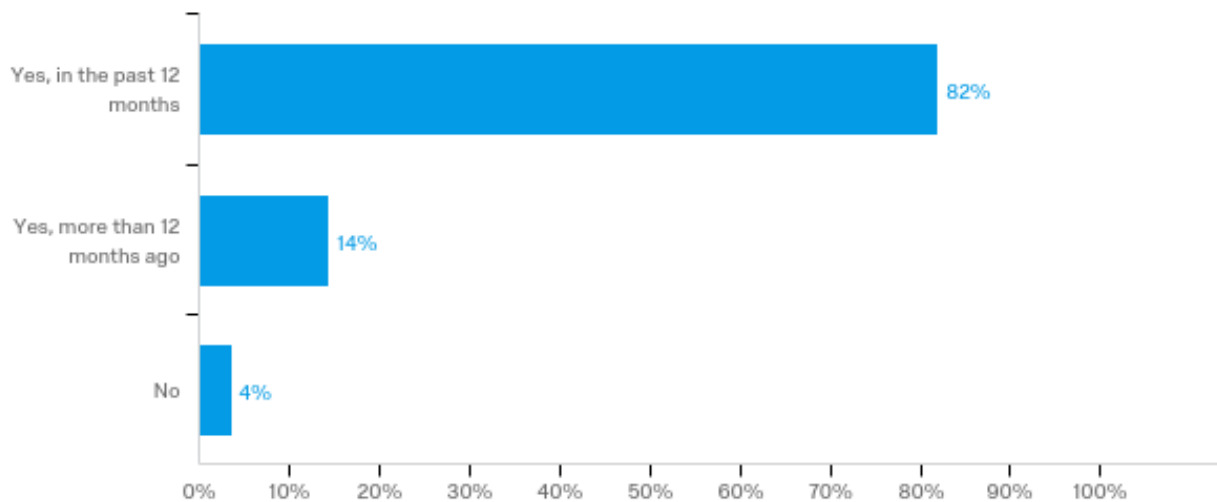
Answer	Count
Yes, in the past 12 months	604
Yes, more than 12 months ago	106
No	26
Total	**736**

SQ4 - During which month(s) did you visit a winery or wineries in the Umpqua Valley? Check all that apply. (n=631)

Answer	%	Count
January	23%	142
February	28%	179
March	28%	178
April	32%	199
May	39%	248
June	38%	238
July	37%	231
August	42%	262
September	46%	287
October	37%	230
November	35%	219
December	27%	173

SQ5 - Please indicate how often, on average, you buy wine at a retail store or winery tasting room in the following price ranges (per standard 750ml bottle). Do not include wine purchased at restaurants.

Question	Weekly		Monthly		Several times per year		Less than several times per year		Never		Total
Under $14	27%	160	27%	164	25%	147	13%	76	9%	54	601
$14 - $19.99	10%	66	38%	248	40%	260	10%	62	3%	18	654
$20 - $29.99	5%	32	29%	207	51%	369	14%	101	1%	10	719
$30 - $49.99	1%	6	14%	93	44%	293	34%	225	8%	54	671
$50 or more	0%	2	5%	30	21%	127	42%	257	32%	196	612

About Your Trip (All Recent Winery Visitors/A1&A2)

Q1.1 - Which of the following best describes your trip? (n=637)
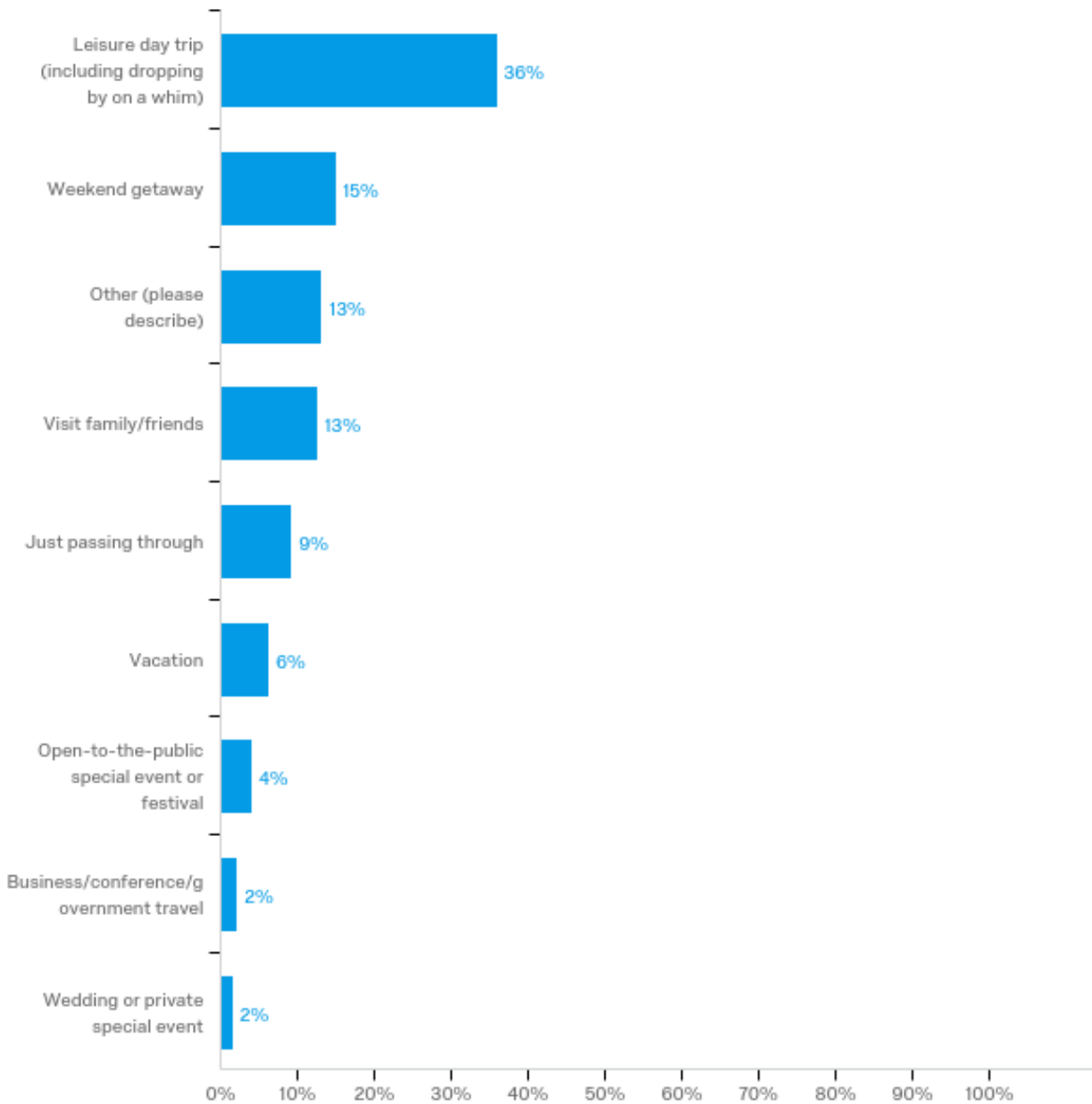
Answer	Count
Leisure day trip (including dropping by on a whim)	229
Weekend getaway	95
Other (please describe)	84
Visit family/friends	80
Just passing through	59
Vacation	40
Open-to-the-public special event or festival	26
Business/conference/government travel	14
Wedding or private special event	10
Total	**637**

Q1.1b - Did you travel more than 50 miles from your home to visit a winery on this trip? (n=505)

Answer	%	Count
Yes	56.24%	284
No	43.76%	221
Total	**100%**	**505**

Q1.1c - Was the primary purpose of your trip to visit a winery or wineries? (n=506)

Answer	%	Count
Yes	72.73%	368
No	27.27%	138
Total	**100%**	**506**

Q1.2 - On this trip, did you stay overnight in the Umpqua Valley anywhere outside your home? (n=639)

Answer	%	Count
No	60.25%	385
Yes	39.75%	254
Total	**100%**	**639**

Q1.2b - How many nights away from home did you stay in the Umpqua Valley? (n=206)

Field	Minimum	Maximum	Mean	Std Deviation	Variance	Count
How many nights away from home did you stay in the Umpqua Valley?	1	145	4	12	136	206

Q1.2c - Where did you stay overnight while in the Umpqua Valley? (n=252)
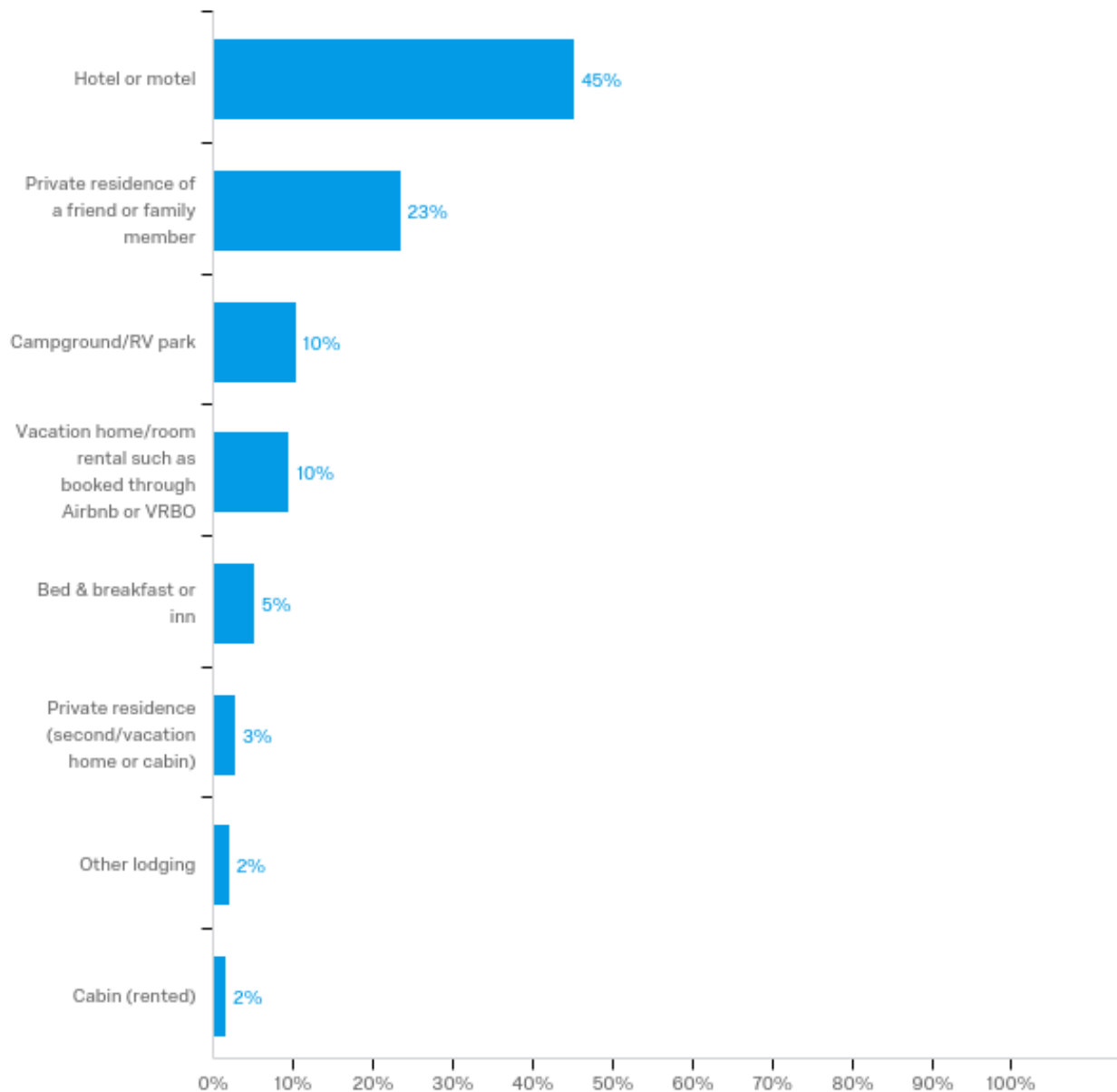
Answer	Count
Hotel or motel	114
Private residence of a friend or family member	59
Campground/RV park	26
Vacation home/room rental such as booked through Airbnb or VRBO	24
Bed & breakfast or inn	13
Private residence (second/vacation home or cabin)	7
Other lodging	5
Cabin (rented)	4
Total	**252**

Q1.4 - How many wineries did you visit to taste or buy wine at as part of your trip? (n=550)
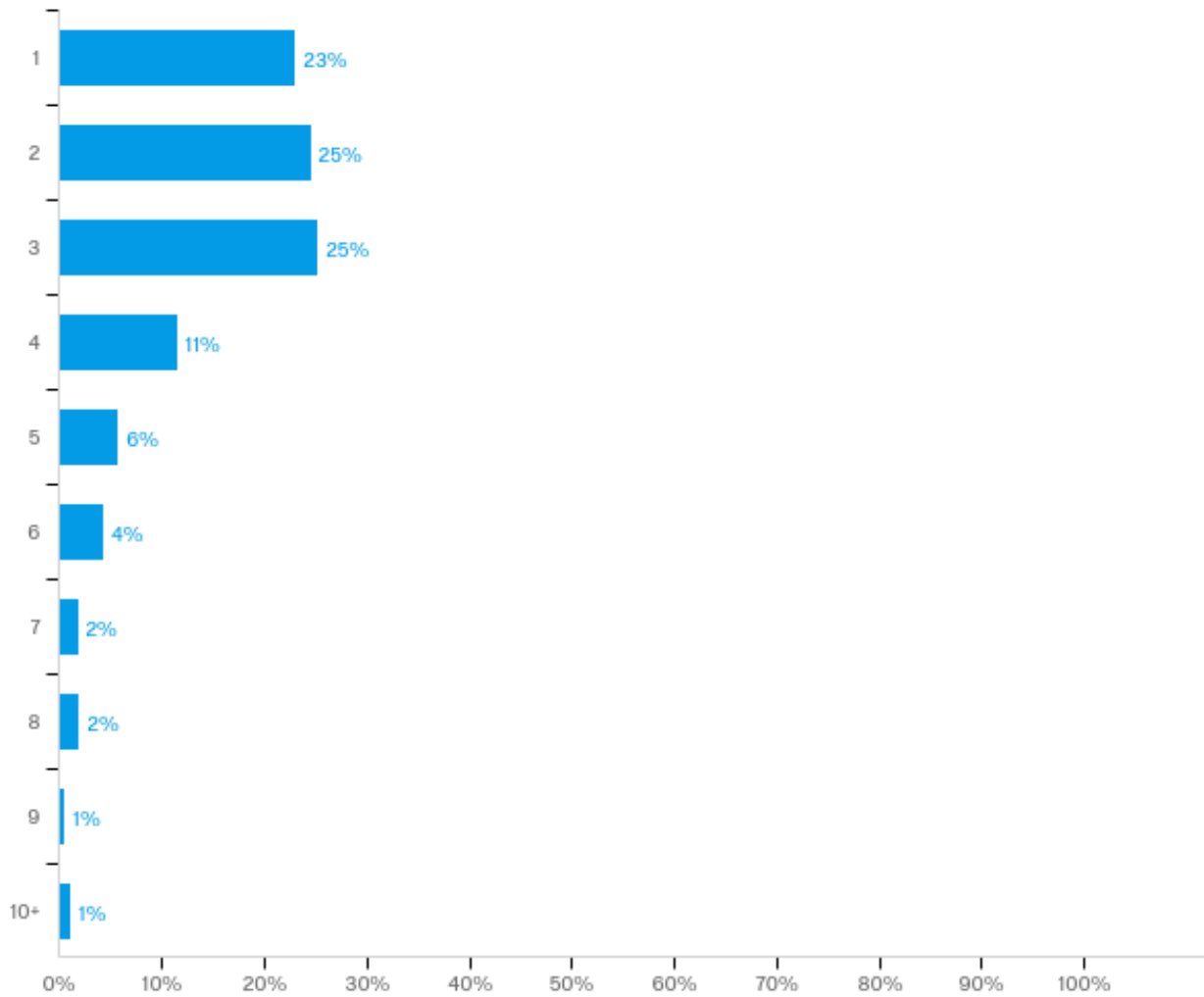
Answer	%	Count
1	23.09%	127
2	24.55%	135
3	25.27%	139
4	11.45%	63
5	5.82%	32
6	4.36%	24
7	1.82%	10
8	2.00%	11
9	0.55%	3
10+	1.09%	6
Total	**100%**	**550**

Q1.5 - Which modes of transportation did you use during your trip to get to wineries? Select all that apply. (n=630)
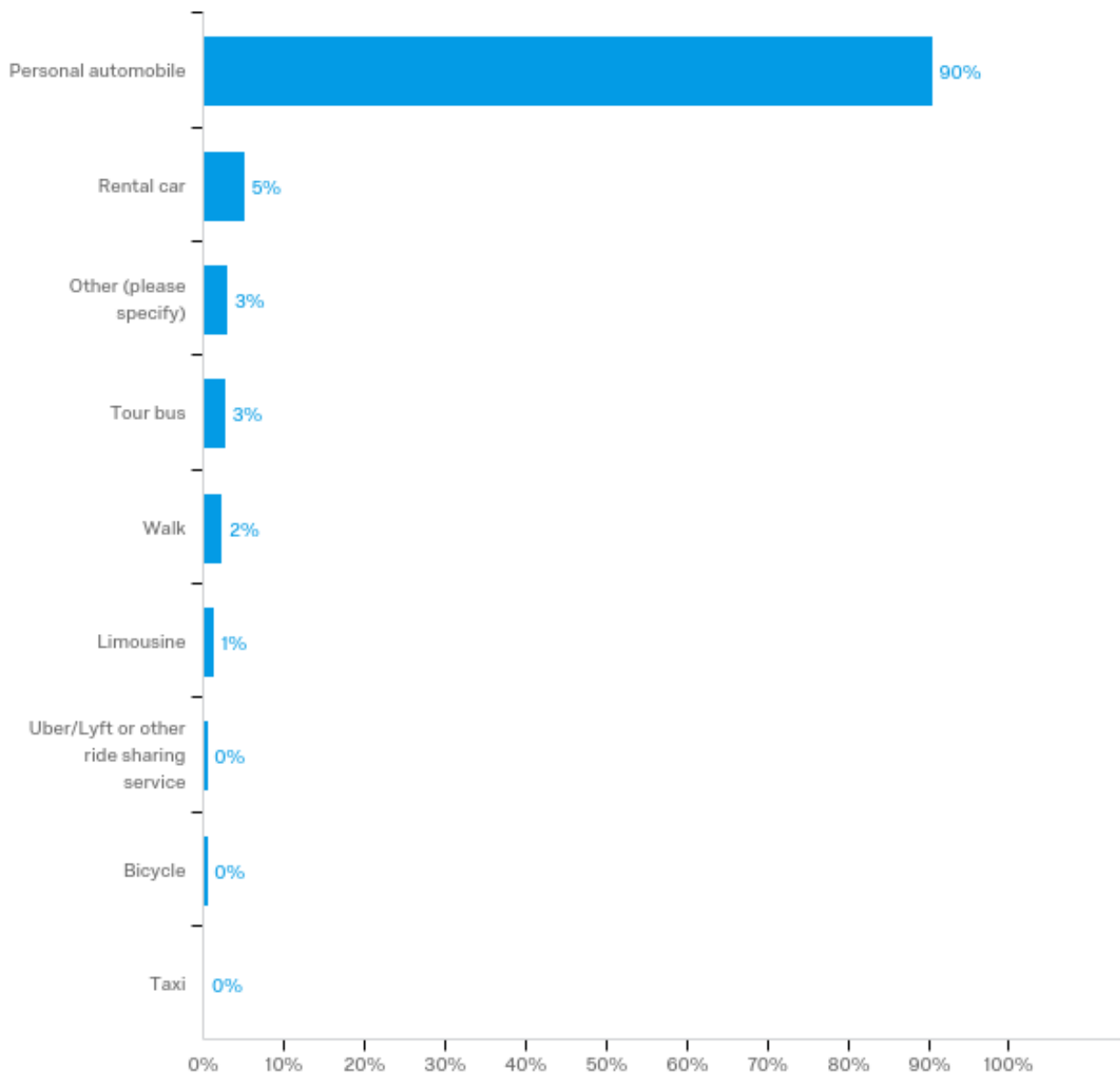
Answer	Count
Personal automobile	570
Rental car	32
Other (please specify)	19
Tour bus	17
Walk	15
Limousine	8
Uber/Lyft or other ride sharing service	3
Bicycle	3
Taxi	1

Q1.6 - Which of the following resources did you use to select the wineries and tasting rooms you visited as part of your trip? Select all that apply. (n=626)

Answer	%	Count
Word of mouth (recommendation from friend/family, local resident, etc.)	47%	297
Other (please specify)	24%	150
Website(s) of an individual winery or wineries	20%	124
Free travel guidebook/brochure/map	19%	120
Umpqua Valley Winegrowers website	18%	110
Road signs or billboards	14%	90
Wine publication, online or in print (e.g. Wine Spectator, Wine & Spirits)	13%	84
Mapping website (e.g. Google Maps)	9%	57
Social Media (e.g. Facebook, Instagram, etc.)	6%	39
Reviews website (e.g. Yelp, TripAdvisor)	5%	29
Restaurant, wine store, or retailer referral	4%	26
Recommendation from a local restaurant	3%	20
Visitors/welcome center	3%	18
Magazine/newspaper (not wine-specific)	3%	16
Great Umpqua Bounty/ Food Trail website	2%	13
Concierge or other hotel/B&B staff	1%	9
Other travel-related website	1%	9
Commercial travel guidebook (e.g. Lonely Planet)	1%	6
Online travel agency (e.g. Expedia, Priceline)	1%	4
Traditional travel agency	0%	2

Q1.6a - How did you get your free travel guidebook/brochure/map? (n=110)

Answer	Count
Picked up locally during trip	96
Ordered prior to trip	14
Total	**110**

Q1.6b - Which social media platform did you use? (n=39)
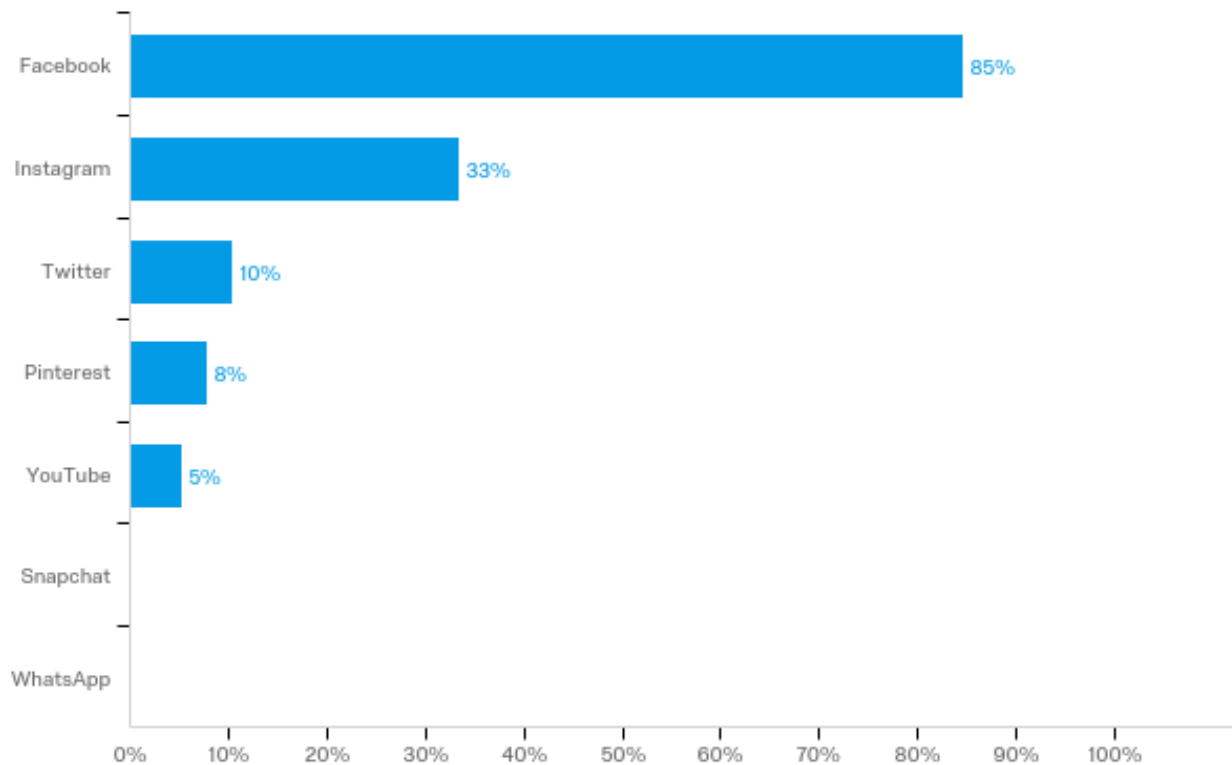
Answer	Count
Facebook	33
Instagram	13
Twitter	4
Pinterest	3
YouTube	2
Snapchat	0
WhatsApp	0

Q1.7 - What other activities did you participate in while in the Umpqua Valley as part of your trip? Select all that apply. (n=495)
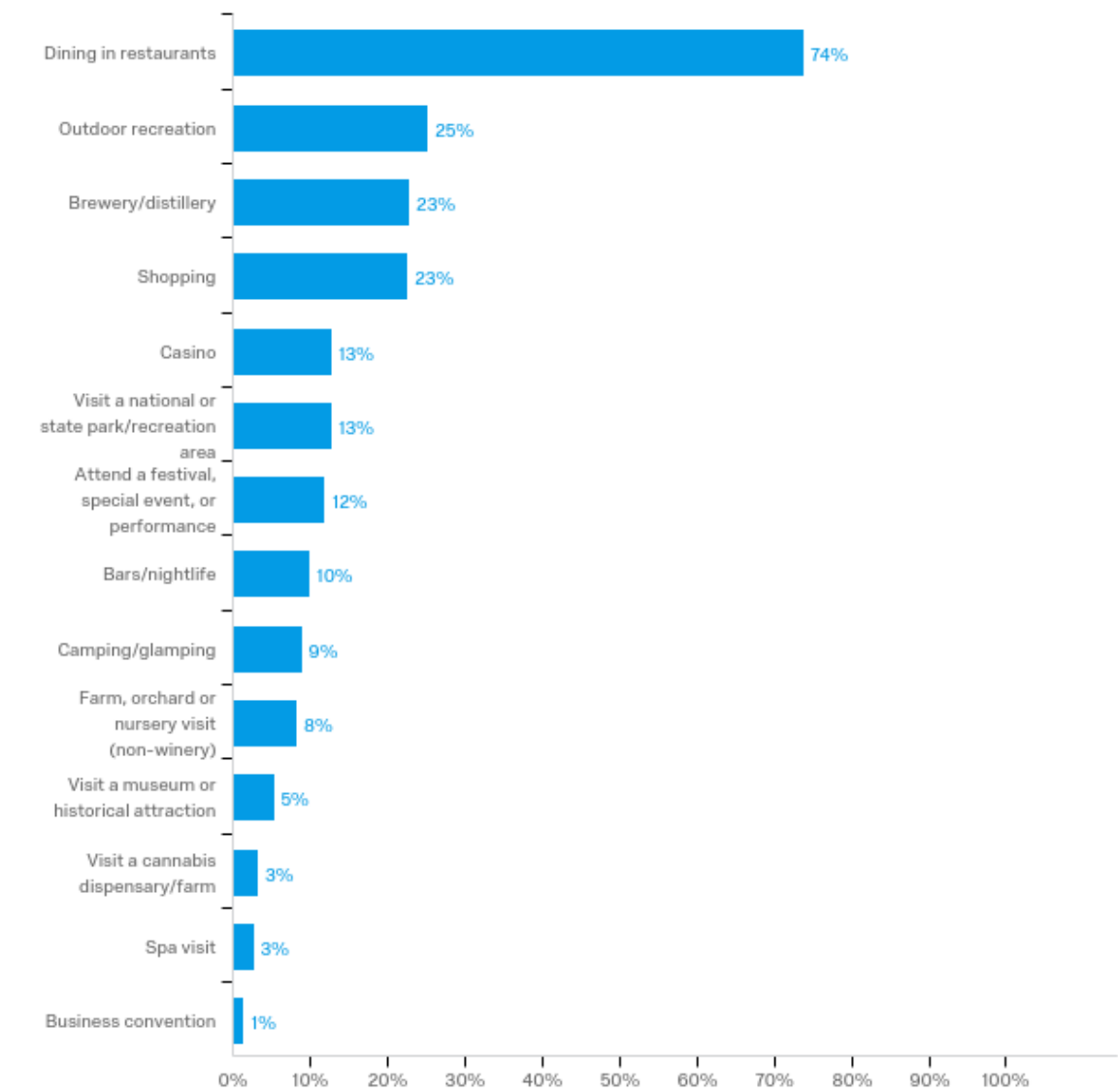
Answer	Count
Dining in restaurants	366
Outdoor recreation	125
Brewery/distillery	113
Shopping	112
Visit a national or state park/recreation area	63
Casino	63
Attend a festival, special event, or performance	59
Bars/nightlife	49
Camping/glamping	44
Farm, orchard or nursery visit (non-winery)	41
Visit a museum or historical attraction	26
Visit a cannabis dispensary/farm	16
Spa visit	13
Business convention	7

Q1.7a - What type of festival, special event, or performance did you attend? Select all that apply. (n=53)
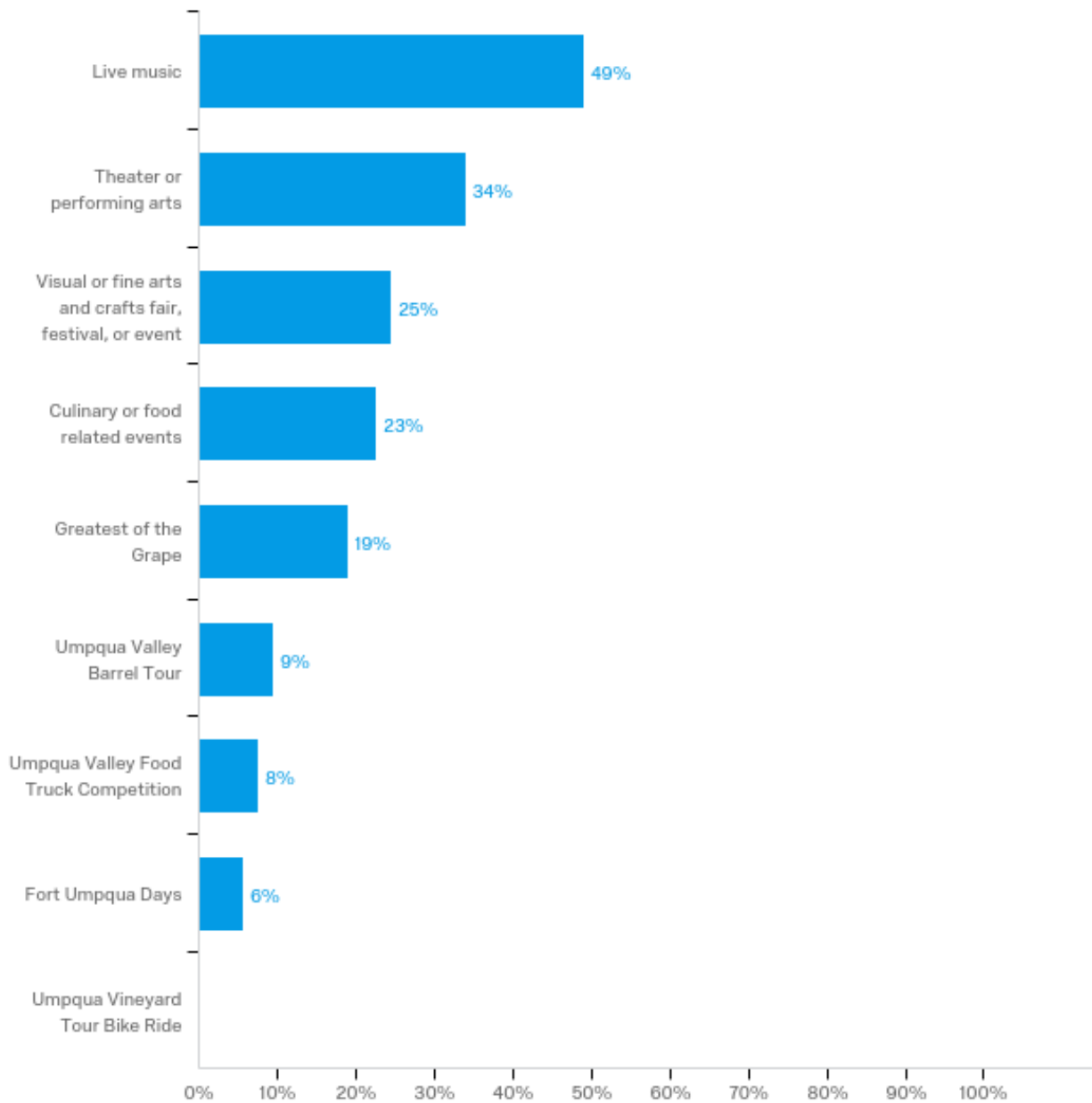
Answer	Count
Live music	26
Theater or performing arts	18
Visual or fine arts and crafts fair, festival, or event	13
Culinary or food related events	12
Greatest of the Grape	10
Umpqua Valley Barrel Tour	5
Umpqua Valley Food Truck Competition	4
Fort Umpqua Days	3
Umpqua Vineyard Tour Bike Ride	0

Q1.7b - What type of outdoor recreation did you do? Select all that apply. (n=120)
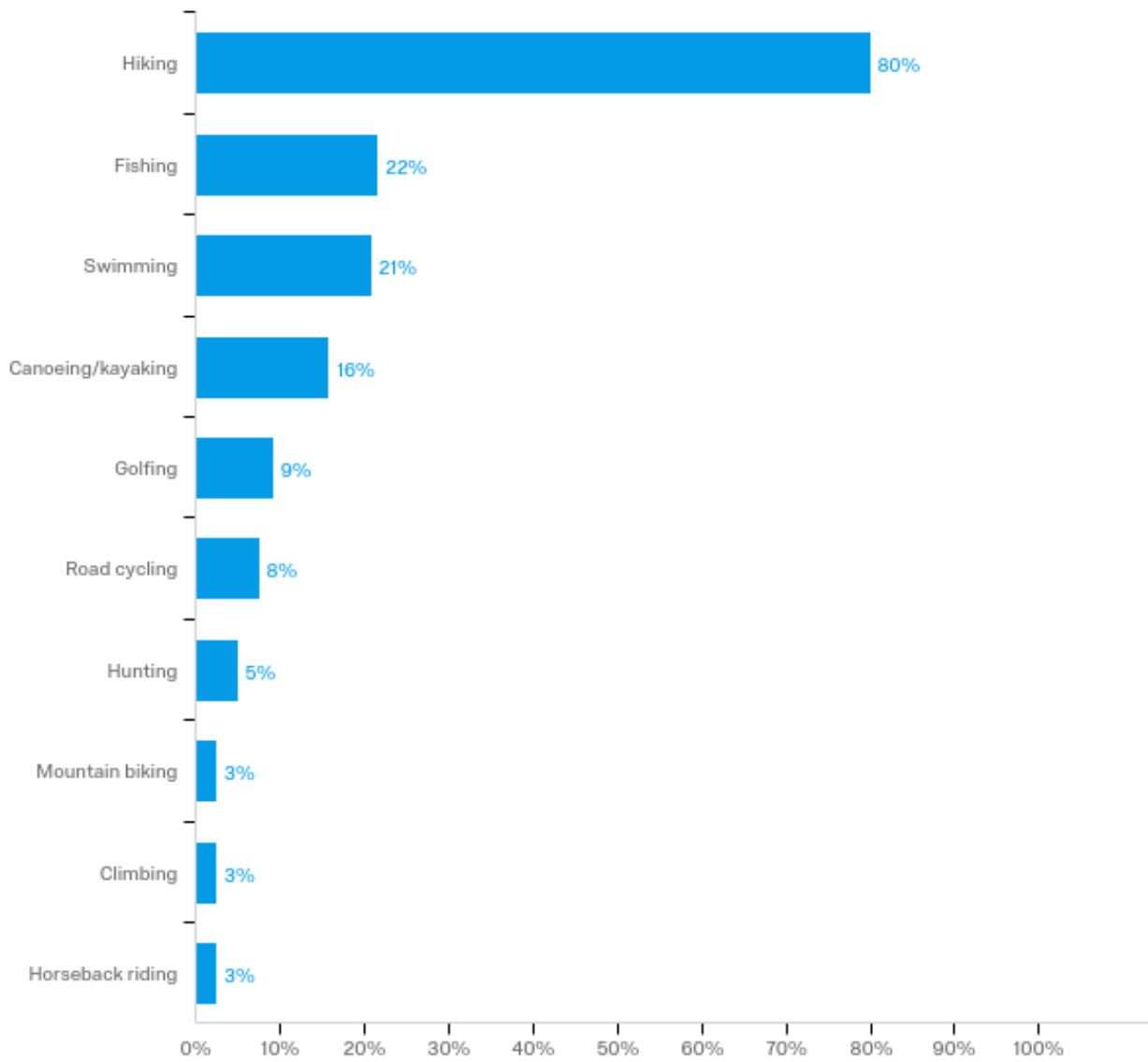
Answer	Count
Hiking	96
Fishing	26
Swimming	25
Canoeing/kayaking	19
Golfing	11
Road cycling	9
Hunting	6
Mountain biking	3
Climbing	3
Horseback riding	3

Q1.8 - Which other Oregon destinations outside of the Umpqua Valley did you visit on this trip? Check all that apply or leave blank if you didn't visit any other Oregon destinations. Refer to the map below. (n=303)
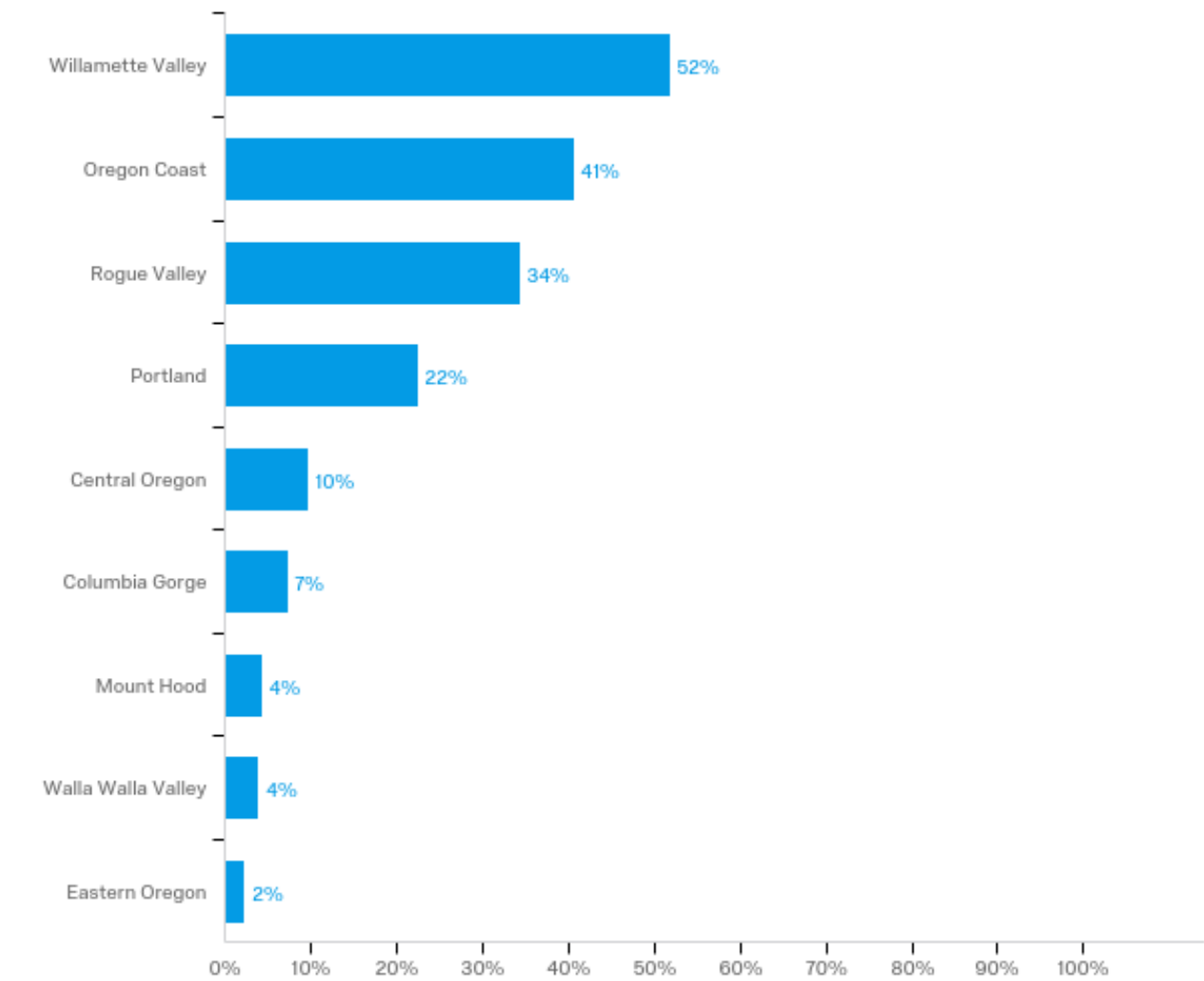
Answer	Count
Willamette Valley	157
Oregon Coast	123
Rogue Valley	104
Portland	68
Central Oregon	29
Columbia Gorge	22
Mount Hood	13
Walla Walla Valley	12
Eastern Oregon	7
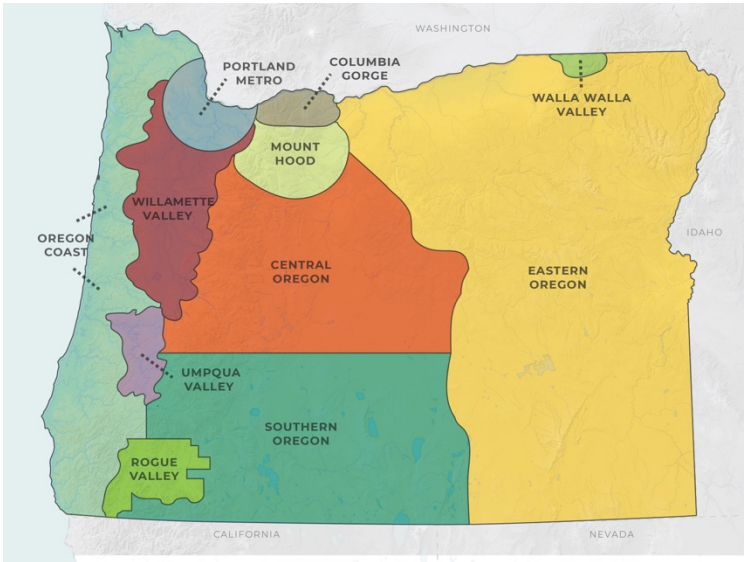
Q1.9 - Please tell us approximately how much your party spent in the Umpqua Valley per day on the following items during this trip.

Field	Minimum	Maximum	Mean	Std Deviation	Variance	Count
Gas, parking, & local transportation	0	4500	41	247	61180	610
Lodging	0	3500	69	255	65053	610
Restaurants & dining out	0	15000	99	616	379121	609
Other (please specify)	0	1000	8	59	3466	608
Retail purchases (excluding wine)	0	4000	34	182	33047	608
Sightseeing & recreation (excluding wine tasting)	0	1000	10	53	2789	607

Q1.10 - Please tell us approximately how much your party spent at winery tasting rooms exclusively in the Umpqua Valley per day during this trip.

Field	Minimum	Maximum	Mean	Std Deviation	Variance	Count
Tasting Fees	0	400	16	39	1557	608
Wine purchased	0	2500	181	216	46796	602

Q1.11 - How many bottles of wine did you buy at wineries during this trip (NOT including wine club shipments)? (n=610)

Field	Minimum	Maximum	Mean	Std Deviation	Variance	Count
Bottles	0	200	9	14	193	610

Q1.11b - What were your reasons for not purchasing bottles of wine on your trip? Select all that apply. (n=32)
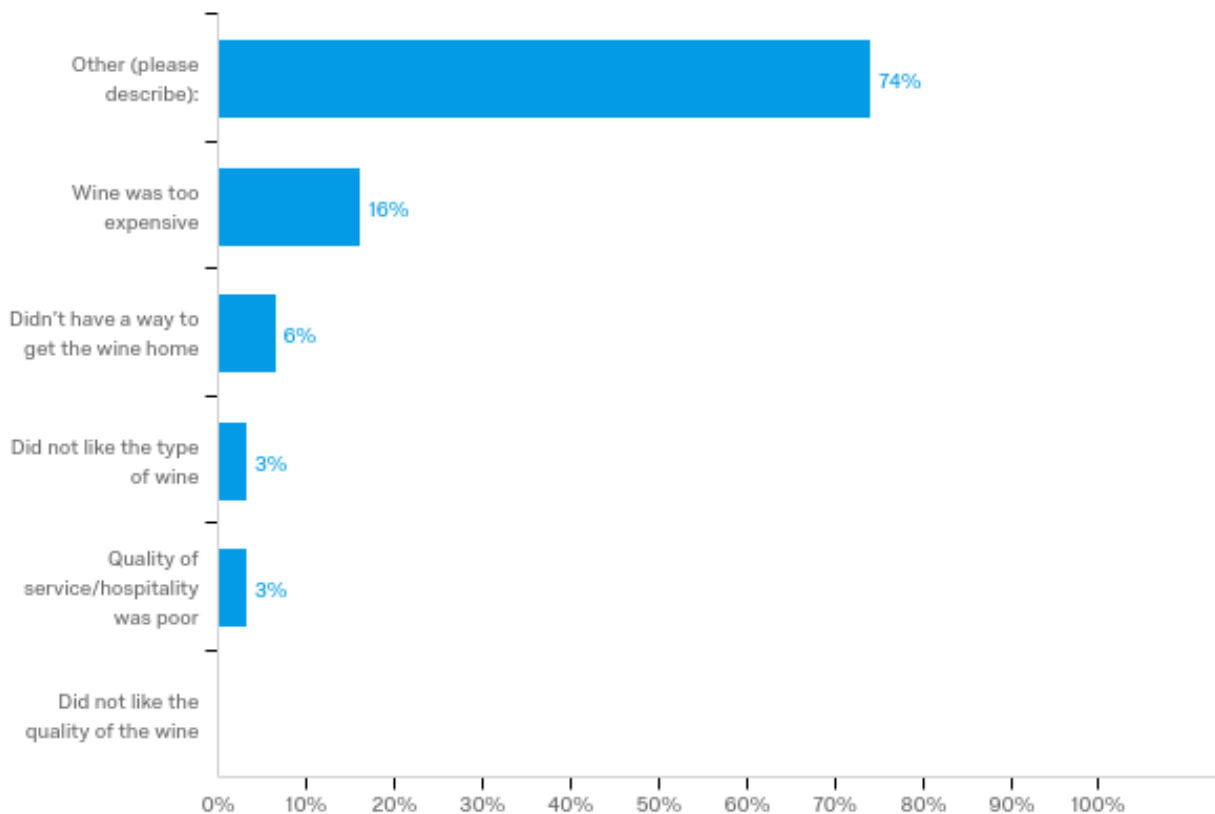
Answer	Count
Other (please describe):	23
Wine was too expensive	5
Didn't have a way to get the wine home	2
Did not like the type of wine	1
Quality of service/hospitality was poor	1
Did not like the quality of the wine	0

Q1.12 - Prior to your visit, were you a member of any wine clubs of wineries in the Umpqua Valley? (n=555)

Answer	Count
Yes	320
No	235
Total	**555**

Q1.13 - How many wine clubs did you sign up for during your trip? (n=547)
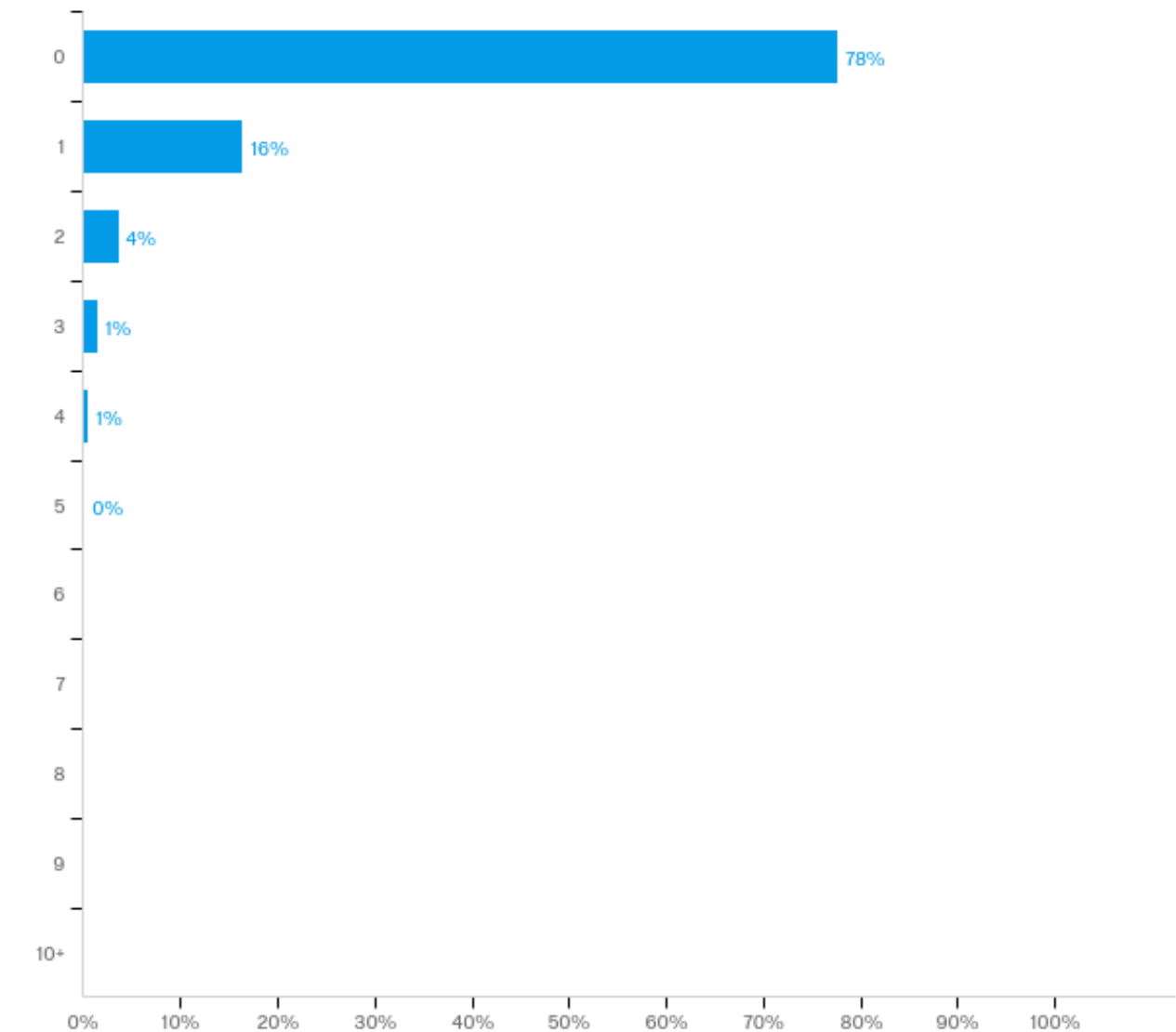
Answer	Count
0	425
1	90
2	20
3	8
4	3
5	1
6	0
7	0
8	0
9	0
10+	0
Total	**547**

Q1.13b - What were your reasons for not signing up for a wine club on your trip? Select all that apply. (n=400)
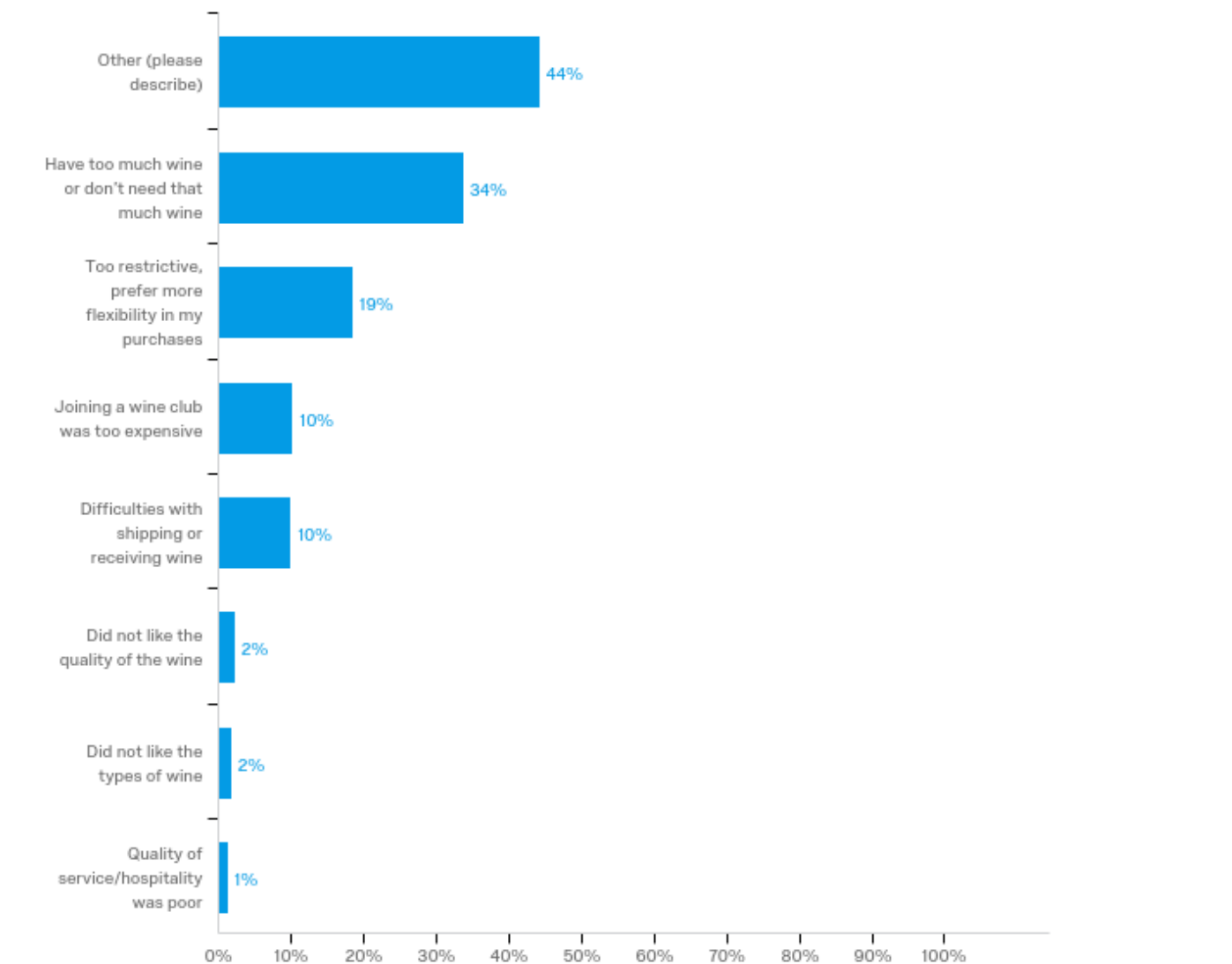
Answer	Count
Other (please describe)	177
Have too much wine or don't need that much wine	135
Too restrictive, prefer more flexibility in my purchases	74
Joining a wine club was too expensive	41
Difficulties with shipping or receiving wine	40
Did not like the quality of the wine	9
Did not like the types of wine	7
Quality of service/hospitality was poor	5

Trip Motivation & Satisfaction (Recent Wine + Region Visitors/A1)

Q2.1 - How satisfied or dissatisfied were you with each of these qualities of the Umpqua Valley during your trip? Mark "N/A" if the quality did not apply to your trip.

Question	Dissatisfied		Neither Satisfied nor Dissatisfied		Satisfied		Total
Ease of traveling to the area from your home/starting point	1%	3	9%	34	90%	329	366
Affordability	0%	1	11%	40	89%	323	364
Quality of accommodations	3%	7	11%	26	87%	213	246
Ease of finding accommodations	5%	11	13%	31	83%	201	243
Opportunity to view/ experience local arts, culture, and history	1%	2	39%	87	60%	132	221
Opportunity to experience farms or farm products (including wine)	1%	4	16%	45	83%	235	284
High quality local cuisine/restaurants	10%	33	30%	95	60%	190	318
Area offers a wide variety of activities for my entire family	3%	6	38%	83	59%	127	216
Terrain/ geography/ climate is conducive to outdoor recreation activity	1%	2	15%	44	84%	239	285
Retail shopping	14%	29	49%	105	37%	79	213
Scenic beauty	0%	1	2%	7	98%	354	362

Q2.2 - How likely or unlikely are you to visit the Umpqua Valley again in the future? (n=390)
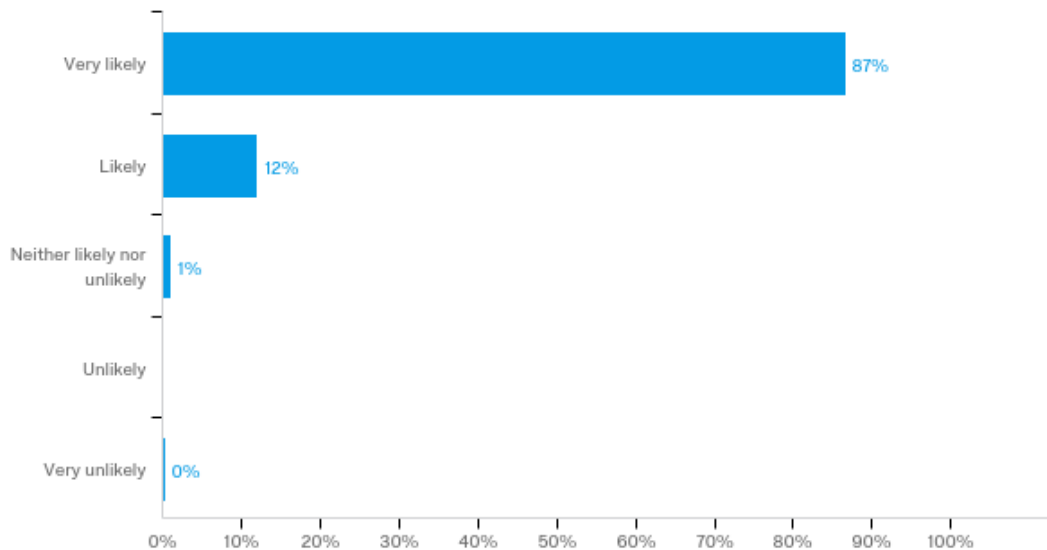
Answer	Count
Very likely	338
Likely	47
Neither likely nor unlikely	4
Unlikely	0
Very unlikely	1
Total	**390**

Q2.3 - In general, which of the following reasons are most important to you in choosing which wineries to visit? Select up to 3. (n=386)
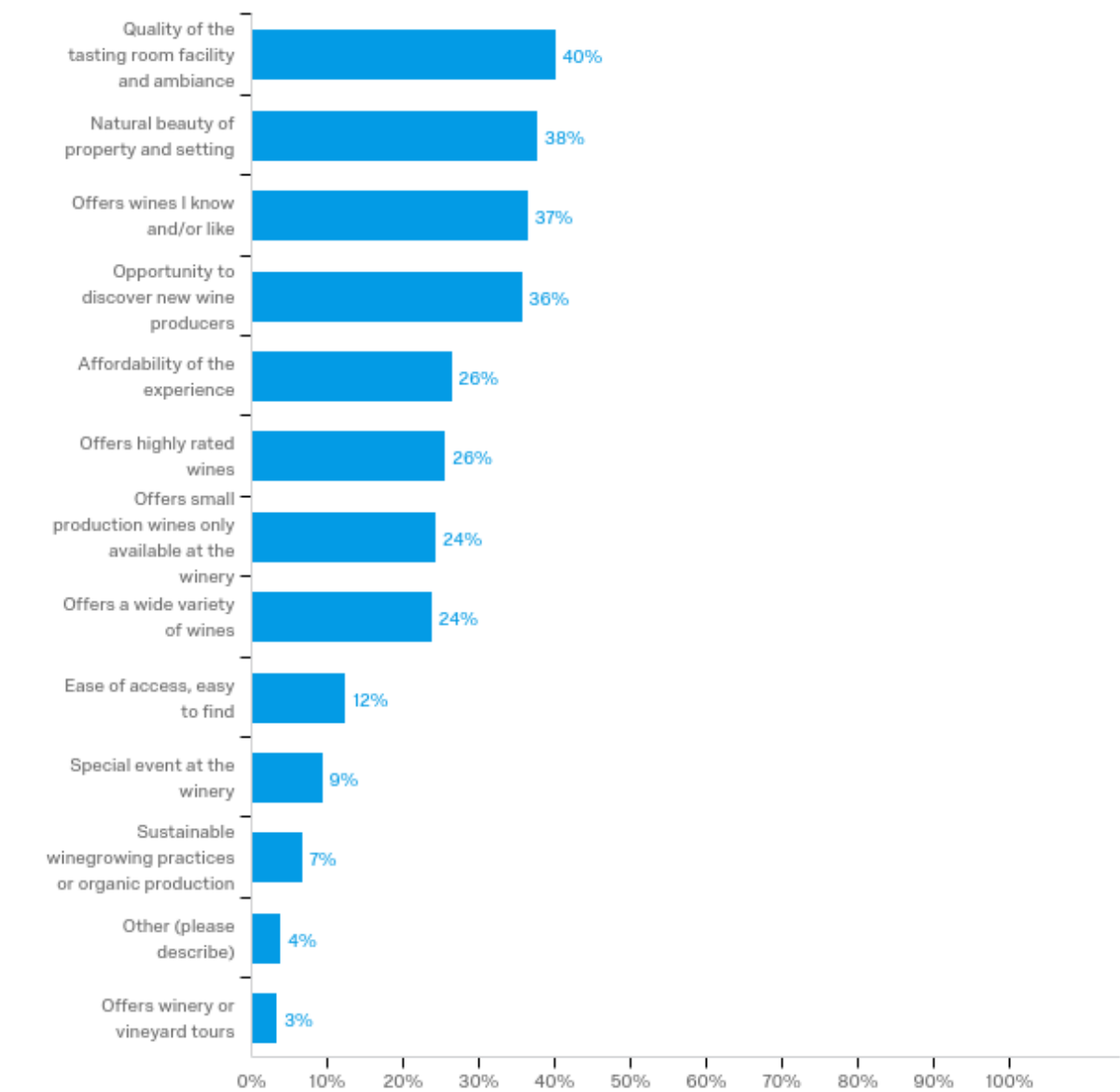
Answer	Count
Quality of the tasting room facility and ambiance	155
Natural beauty of property and setting	146
Offers wines I know and/or like	141
Opportunity to discover new wine producers	138
Affordability of the experience	102
Offers highly rated wines	99
Offers small production wines only available at the winery	94
Offers a wide variety of wines	92
Ease of access, easy to find	48
Special event at the winery	36
Sustainable winegrowing practices or organic production	26
Other (please describe)	15
Offers winery or vineyard tours	13

Q2.4 - In general, which of the following factors are most important to you for creating an enjoyable experience at a winery? Select up to 3. (n=384)
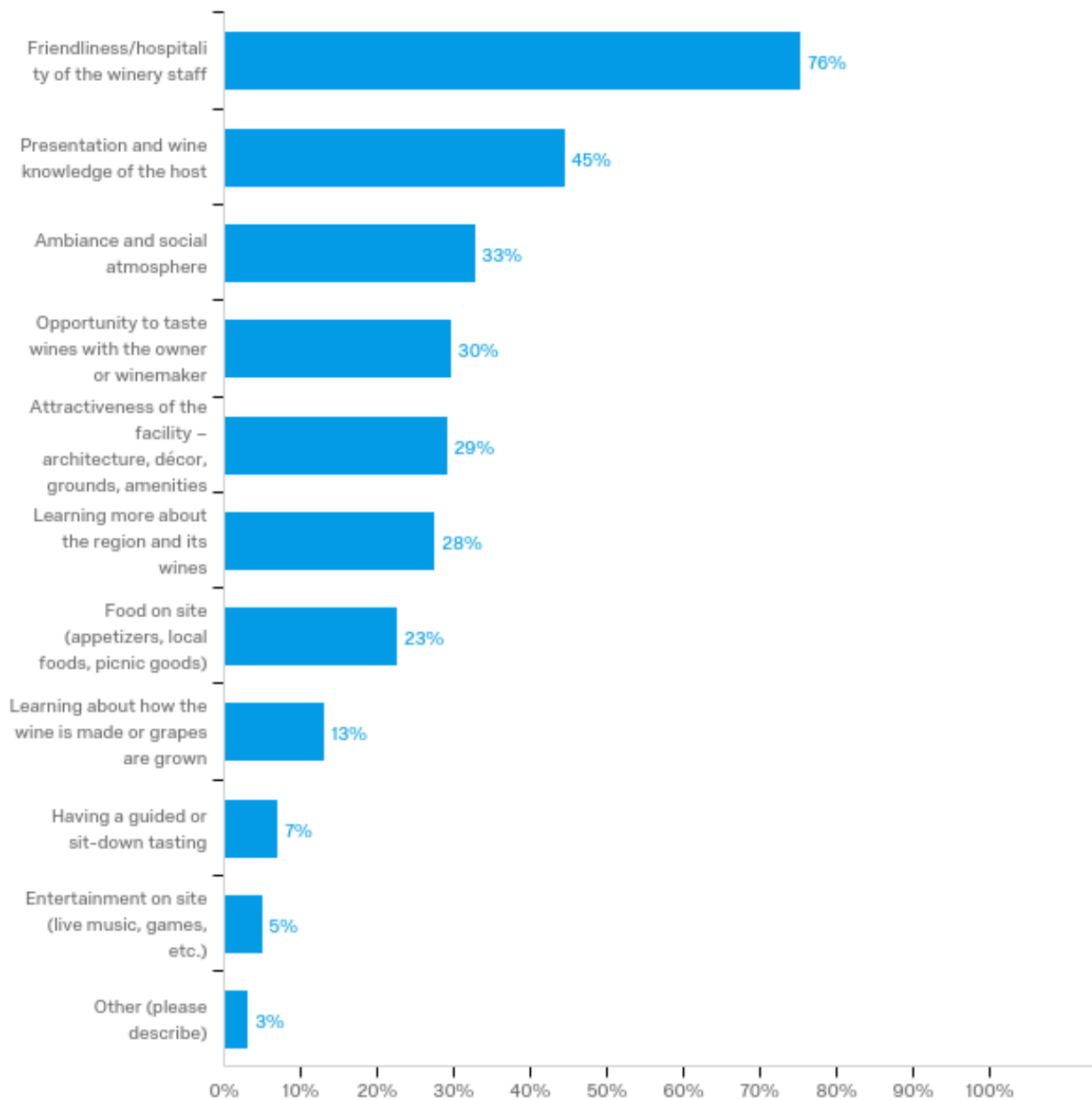
Answer	Count
Friendliness/hospitality of the winery staff	290
Presentation and wine knowledge of the host	171
Ambiance and social atmosphere	126
Opportunity to taste wines with the owner or winemaker	114
Attractiveness of the facility – architecture, décor, grounds, amenities	112
Learning more about the region and its wines	106
Food on site (appetizers, local foods, picnic goods)	87
Learning about how the wine is made or grapes are grown	50
Having a guided or sit-down tasting	27
Entertainment on site (live music, games, etc.)	19
Other (please describe)	12

Q2.6 - How satisfied or dissatisfied were you with the following traits or features of your experience at wineries during your trip?

Question	Dissatisfied		Neither Satisfied nor Dissatisfied		Satisfied		Satisfaction varied greatly by winery		Don't Know		Total
Quality of the wines	0%	0	2%	6	70%	269	29%	110	0%	0	385
Ease of travel to and finding the wineries	1%	4	9%	33	80%	308	10%	38	1%	2	385
Value of the wines for their price	1%	4	6%	24	73%	280	20%	76	0%	0	384
Attractiveness of the facilities – architecture, décor, grounds, amenities	0%	1	4%	17	73%	282	22%	83	0%	1	384
Presentation and knowledge of winery hosts	0%	1	4%	14	77%	293	20%	75	0%	0	383
Cost of tasting fees	5%	18	20%	77	57%	217	10%	40	8%	30	382
Natural beauty of properties and setting	0%	0	4%	17	80%	305	15%	59	0%	1	382
Friendliness/hospitality of winery staff	1%	2	3%	11	80%	304	17%	65	0%	0	382

Q2.8 - To what extent do you agree or disagree with the following statements, based on your most recent trip to the Umpqua Valley?

Question	Disagree		Neither Agree nor Disagree		Agree		Total
I have purchased wines from the Umpqua Valley at my local retailer or a local restaurant/bar.	27%	99	12%	45	61%	222	366
I am very likely to recommend wines from the Umpqua Valley to others.	0%	1	7%	26	93%	340	367
I am very likely to recommend a trip to the Umpqua Valley to others.	0%	0	6%	21	94%	348	369

Trip Motivation & Satisfaction (Recent Wine + Residents/A2)

Q2.3 - In general, which of the following reasons are most important to you in choosing which wineries to visit? Select up to 3. (n=198)
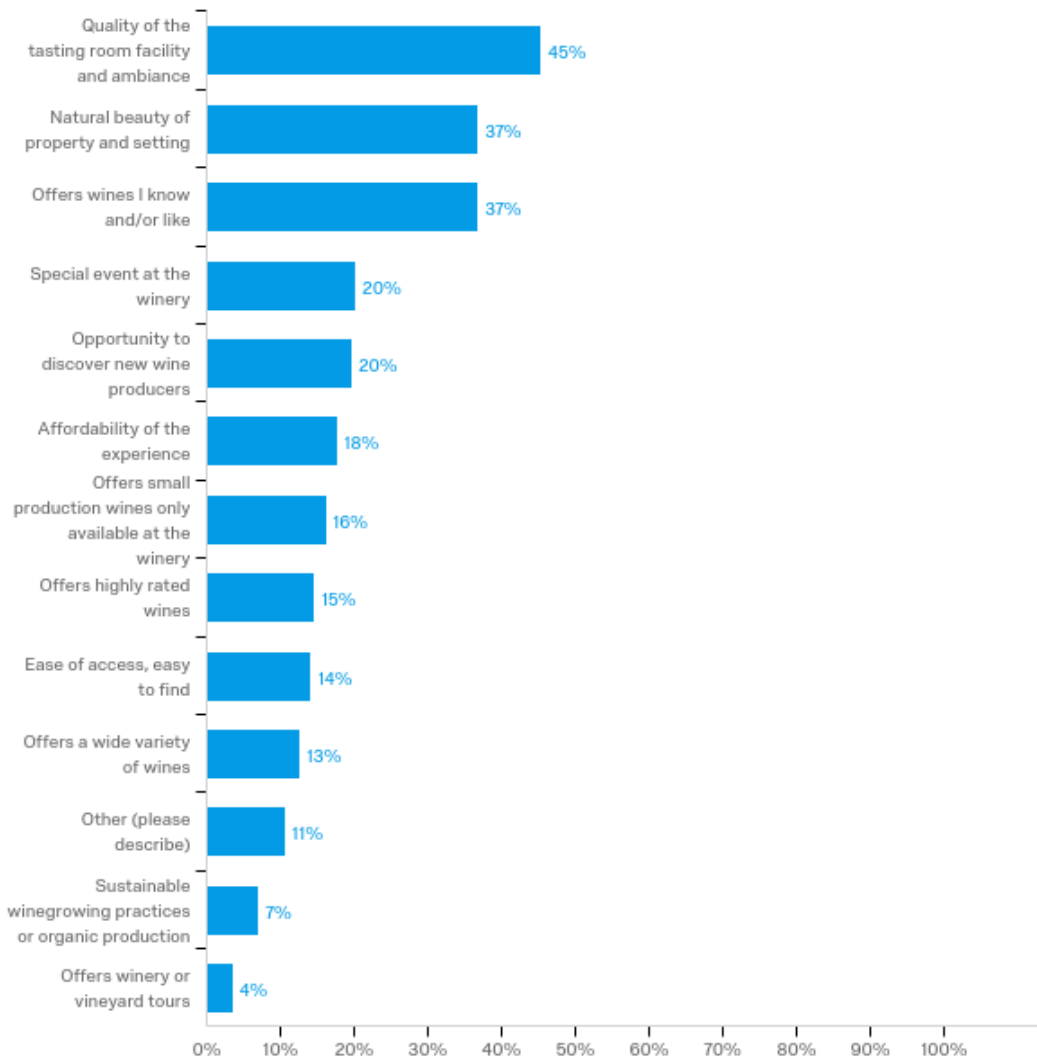
Answer	Count
Quality of the tasting room facility and ambiance	90
Natural beauty of property and setting	73
Offers wines I know and/or like	73
Special event at the winery	40
Opportunity to discover new wine producers	39
Affordability of the experience	35
Offers small production wines only available at the winery	32
Offers highly rated wines	29
Ease of access, easy to find	28
Offers a wide variety of wines	25
Other (please describe)	21
Sustainable winegrowing practices or organic production	14
Offers winery or vineyard tours	7

Q2.4 - In general, which of the following factors are most important to you for creating an enjoyable experience at a winery? Select up to 3. (n=198)
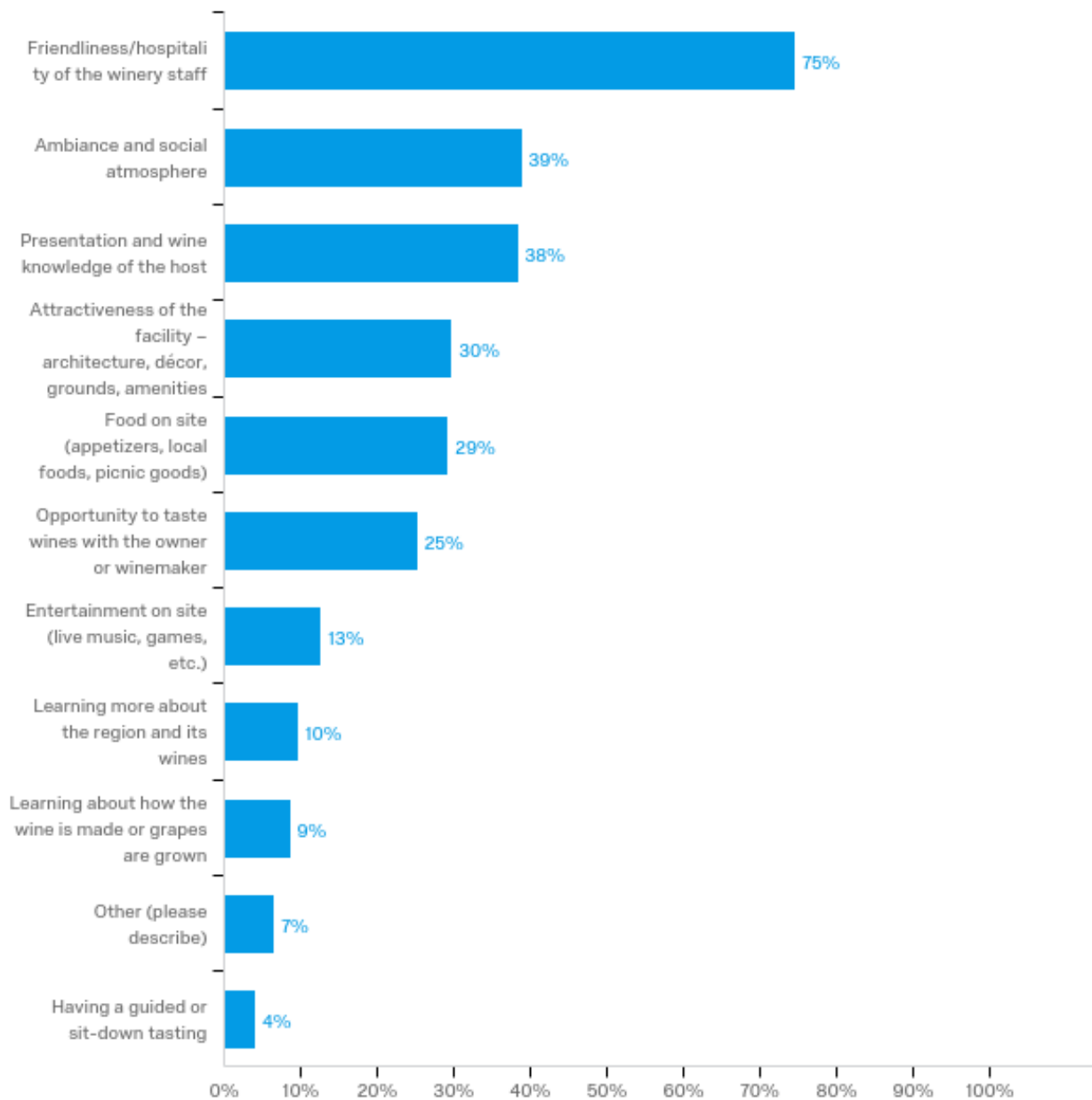
Answer	Count
Friendliness/hospitality of the winery staff	148
Ambiance and social atmosphere	77
Presentation and wine knowledge of the host	76
Attractiveness of the facility – architecture, décor, grounds, amenities	59
Food on site (appetizers, local foods, picnic goods)	58
Opportunity to taste wines with the owner or winemaker	50
Entertainment on site (live music, games, etc.)	25
Learning more about the region and its wines	19
Learning about how the wine is made or grapes are grown	17
Other (please describe)	13
Having a guided or sit-down tasting	8

Q2.6 - How satisfied or dissatisfied were you with the following traits or features of your experience at wineries during your trip?

Question	Dissatisfied		Neither Satisfied nor Dissatisfied		Satisfied		Satisfaction varied greatly by winery		Don't Know		Total
Friendliness/hospitality of winery staff	1%	2	2%	4	79%	157	18%	35	0%	0	198
Presentation and knowledge of winery hosts	1%	1	3%	6	76%	150	20%	39	1%	1	197
Attractiveness of the facilities – architecture, décor, grounds, amenities	0%	0	4%	7	74%	145	23%	45	0%	0	197
Quality of the wines	0%	0	0%	0	66%	132	34%	67	0%	0	199
Value of the wines for their price	1%	1	5%	10	76%	151	18%	35	1%	1	198
Cost of tasting fees	4%	7	18%	34	65%	125	9%	18	5%	9	193
Ease of travel to and finding the wineries	1%	1	3%	6	87%	171	9%	17	1%	2	197
Natural beauty of properties and setting	0%	0	3%	5	74%	146	23%	45	1%	2	198

Q2.8 - To what extent do you agree or disagree with the following statements, based on your most recent trip to wineries the Umpqua Valley?

Question	Disagree		Neither Agree nor Disagree		Agree		Total
I have purchased wines from the Umpqua Valley at my local retailer or a local restaurant/bar.	5%	9	5%	8	90%	154	171
I am very likely to recommend wines from the Umpqua Valley to others.	0%	0	2%	3	98%	168	171
I am very likely to recommend a trip to the Umpqua Valley to others.	0%	0	2%	4	98%	166	170

Trip Motivation & Satisfaction (Past Winery + Region Visitors/B1)

Q2.1 - How satisfied or dissatisfied were you with each of these qualities of the Umpqua Valley during your trip? Mark "N/A" if the quality did not apply to your trip.

Question	Dissatisfied		Neither Satisfied nor Dissatisfied		Satisfied		Total
Ease of traveling to the area from your home/starting point	2%	2	20%	19	78%	75	96
Affordability	1%	1	12%	12	87%	84	97
Quality of accommodations	10%	7	18%	12	72%	49	68
Ease of finding accommodations	7%	5	16%	11	77%	53	69
Opportunity to view/ experience local arts, culture, and history	8%	6	32%	24	61%	46	76
Opportunity to experience farms or farm products (including wine)	5%	4	15%	13	81%	71	88
High quality local cuisine/restaurants	14%	11	44%	36	42%	34	81
Area offers a wide variety of activities for my entire family	5%	3	48%	29	48%	29	61
Terrain/ geography/ climate is conducive to outdoor recreation activity	0%	0	8%	7	92%	80	87
Retail shopping	14%	9	57%	36	29%	18	63
Scenic beauty	0%	0	1%	1	99%	94	95

Q2.2 - How likely or unlikely are you to visit the Umpqua Valley again in the future? (n=99)
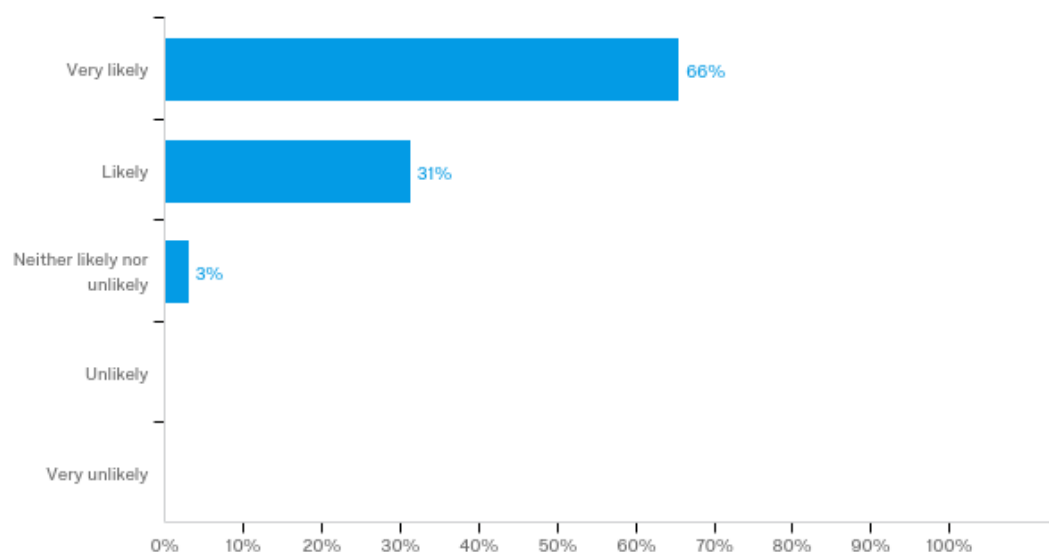
Answer	Count
Very likely	65
Likely	31
Neither likely nor unlikely	3
Unlikely	0
Very unlikely	0
Total	**99**

Q2.3 - In general, which of the following reasons are most important to you in choosing which wineries to visit? Select up to 3. (n=99)
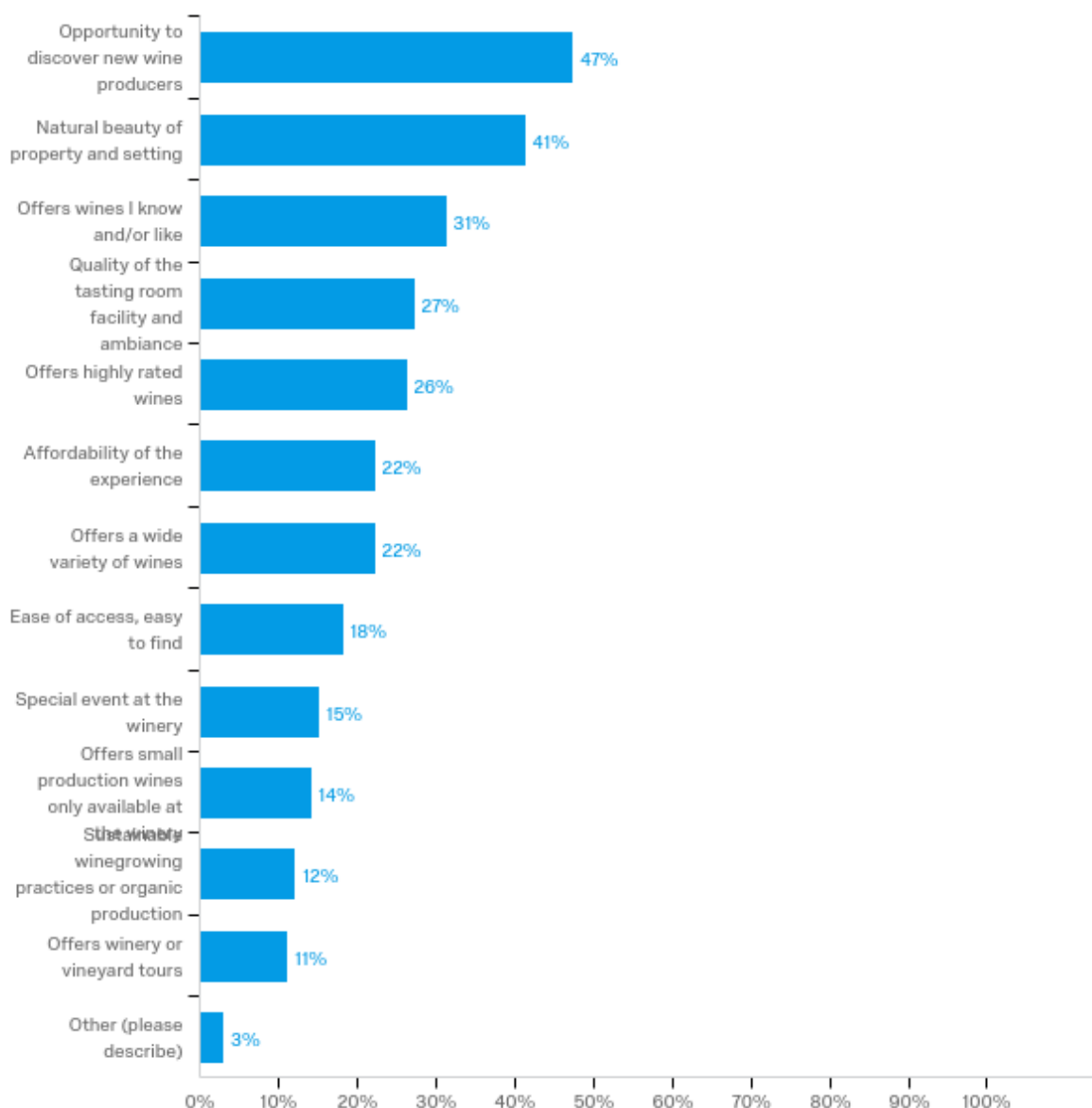
Answer	Count
Opportunity to discover new wine producers	47
Natural beauty of property and setting	41
Offers wines I know and/or like	31
Quality of the tasting room facility and ambiance	27
Offers highly rated wines	26
Offers a wide variety of wines	22
Affordability of the experience	22
Ease of access, easy to find	18
Special event at the winery	15
Offers small production wines only available at the winery	14
Sustainable winegrowing practices or organic production	12
Offers winery or vineyard tours	11
Other (please describe)	3

Q2.4 - In general, which of the following factors are most important to you for creating an enjoyable experience at a winery? Select up to 3. (n=98)
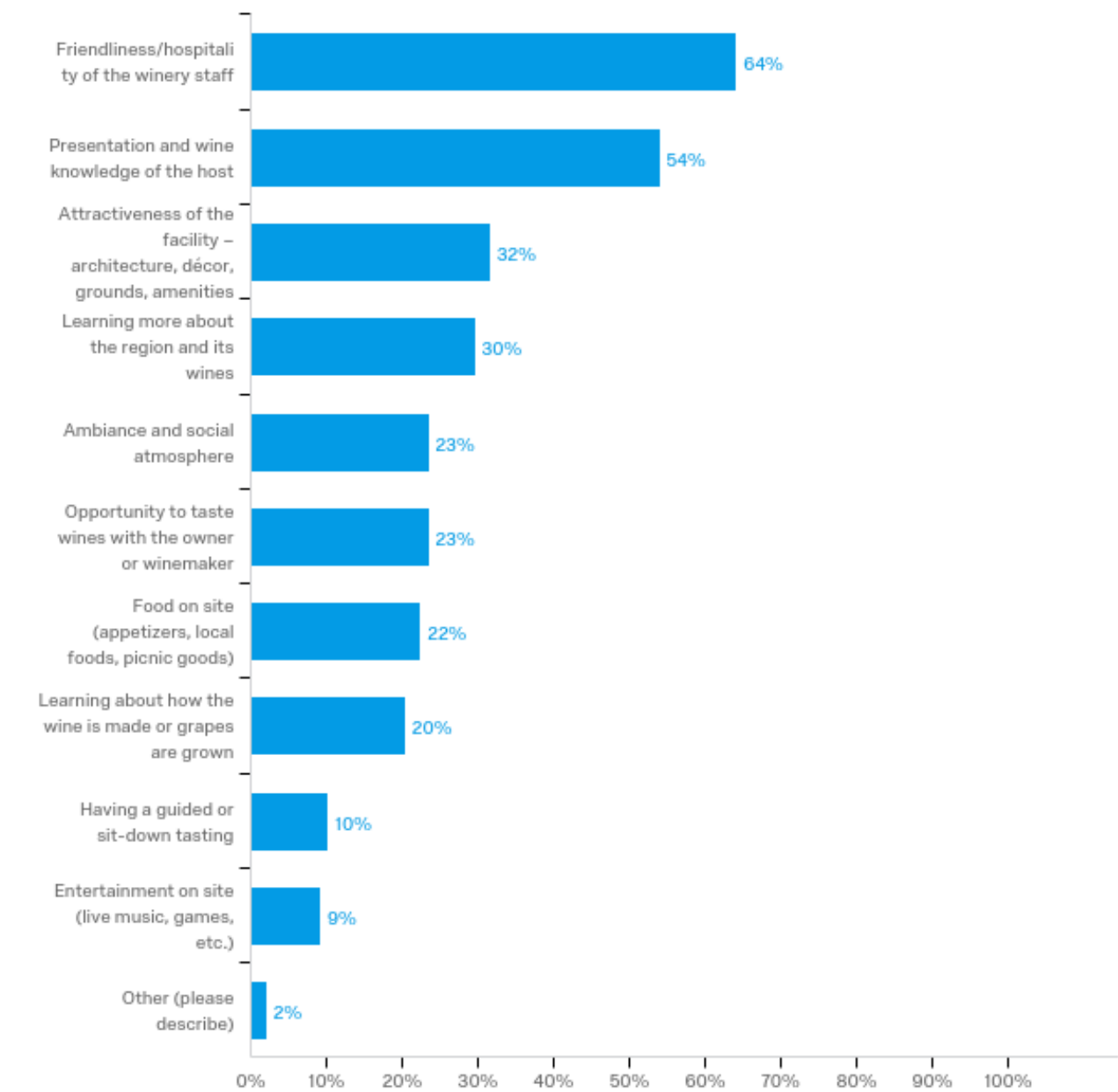
Answer	Count
Friendliness/hospitality of the winery staff	63
Presentation and wine knowledge of the host	53
Attractiveness of the facility – architecture, décor, grounds, amenities	31
Learning more about the region and its wines	29
Ambiance and social atmosphere	23
Opportunity to taste wines with the owner or winemaker	23
Food on site (appetizers, local foods, picnic goods)	22
Learning about how the wine is made or grapes are grown	20
Having a guided or sit-down tasting	10
Entertainment on site (live music, games, etc.)	9
Other (please describe)	2

Q2.5 - Which of the following resources do you typically use to select wineries and tasting rooms to visit? Select all that apply. (n=97)

Answer	%	Count
Word of mouth (recommendation from friend/family, local resident, etc.)	62%	60
Websites of wineries or winery associations	49%	48
Wine publication, online or in print (e.g. Wine Spectator, Wine & Spirits)	45%	44
Website(s) of an individual winery or wineries	45%	44
Free travel guidebook/brochure/map	41%	40
Road signs or billboards	33%	32
Social Media (e.g. Facebook, Instagram, etc.)	24%	23
Restaurant, wine store, or retailer referral	19%	18
Recommendation from a local restaurant	19%	18
Magazine/newspaper (not wine-specific)	18%	17
Mapping website (e.g. Google Maps)	15%	15
Other travel-related website	15%	15
Reviews website (e.g. Yelp, TripAdvisor)	15%	15
Concierge or other hotel/B&B staff	18%	13
Visitors/welcome center	8%	8
Commercial travel guidebook (e.g. Lonely Planet)	6%	6
Other (please specify)	5%	5
Traditional travel agency	0%	0
Online travel agency (e.g. Expedia, Priceline)	0%	0

Q2.5b - Which social media platform(s) do you use for selecting wineries? (n=23)
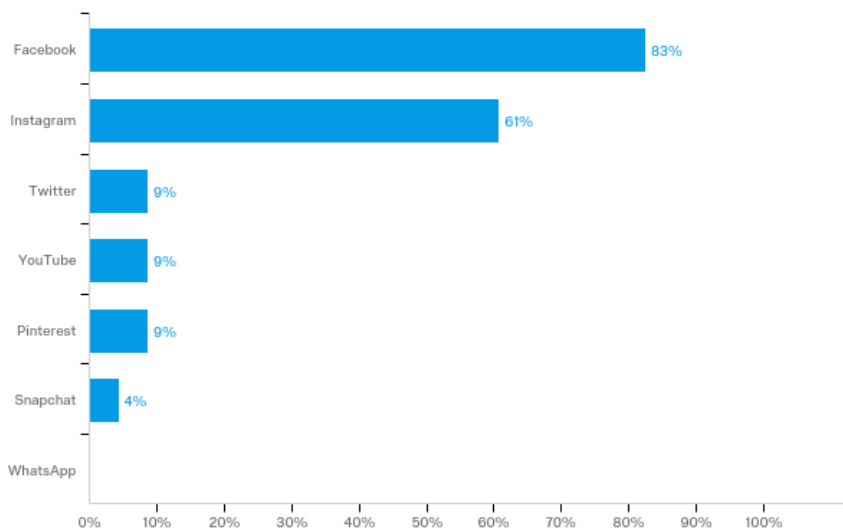
Answer	Count
Facebook	19
Instagram	14
Twitter	2
YouTube	2
Pinterest	2
Snapchat	1
WhatsApp	0

Q2.6 - To the best of your recollection, how satisfied or dissatisfied were you with the following traits or features of your experience at wineries during your trip?

Question	Dissatisfied		Neither Satisfied nor Dissatisfied		Satisfied		Satisfaction varied greatly by winery		Don't Know		Total
Quality of the wines	0%	0	1%	1	63%	61	36%	35	0%	0	97
Value of the wines for their price	1%	1	2%	2	72%	70	25%	24	0%	0	97
Cost of tasting fees	6%	6	18%	17	53%	51	23%	22	1%	1	97
Ease of travel to and finding the wineries	0%	0	13%	13	72%	70	14%	14	0%	0	97
Natural beauty of properties and setting	0%	0	7%	7	65%	63	28%	27	0%	0	97
Attractiveness of the facilities – architecture, décor, grounds, amenities	0%	0	7%	7	60%	58	33%	32	0%	0	97
Presentation and knowledge of winery hosts	1%	1	3%	3	57%	55	37%	36	2%	2	97
Friendliness/hospitality of winery staff	0%	0	1%	1	73%	70	26%	25	0%	0	96

Q2.7 - What factors prevent you from returning to or visiting wineries in the Umpqua Valley more frequently? Select all that apply. (n=93)
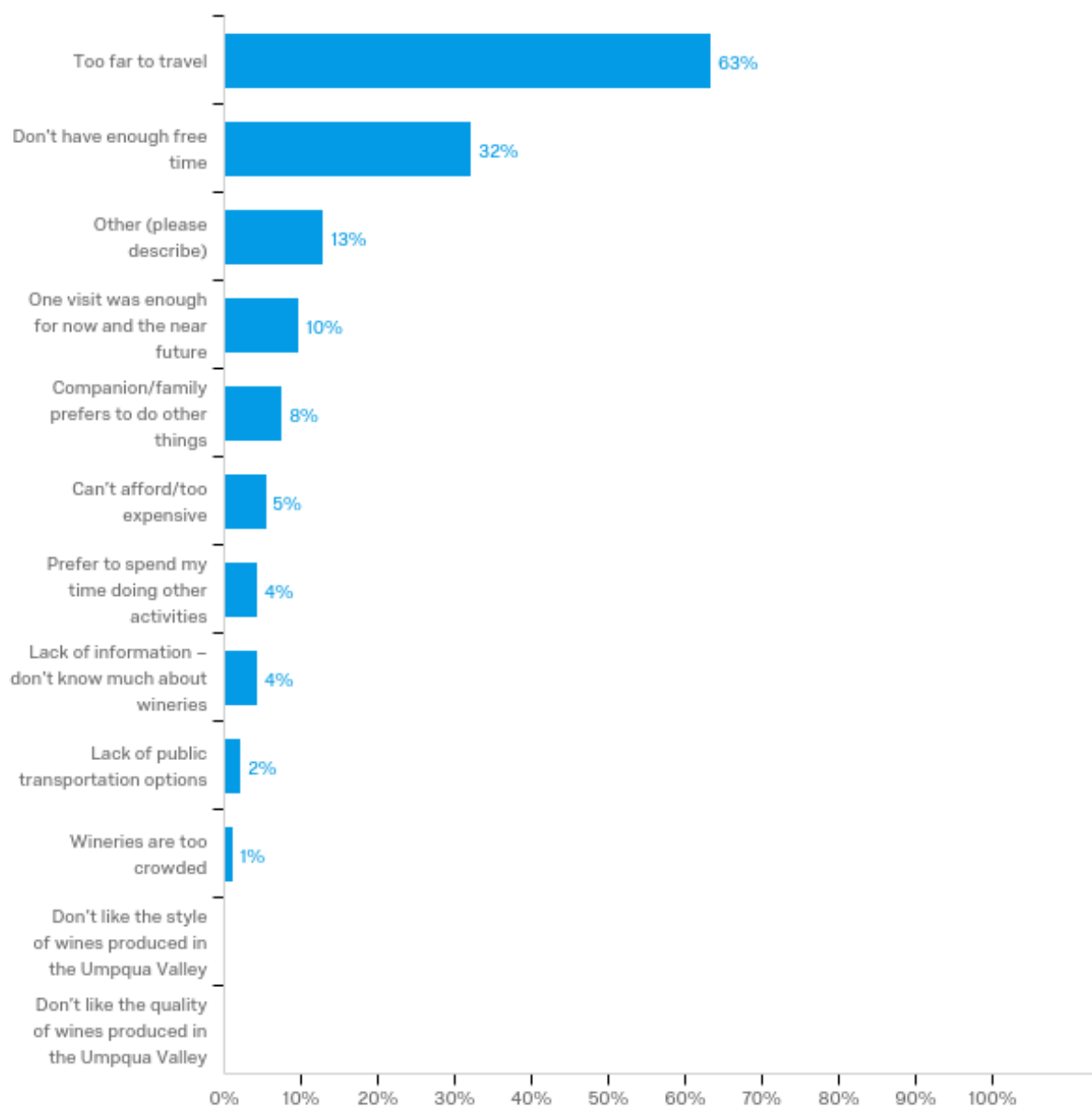
Answer	Count
Too far to travel	59
Don't have enough free time	30
Other (please describe)	12
One visit was enough for now and the near future	9
Companion/family prefers to do other things	7
Can't afford/too expensive	5
Prefer to spend my time doing other activities	4
Lack of information – don't know much about wineries	4
Lack of public transportation options	2
Wineries are too crowded	1
Don't like the quality of wines produced in the Umpqua Valley	0
Don't like the style of wines produced in the Umpqua Valley	0

Q2.8 - To what extent do you agree or disagree with the following statements, based on your most recent trip to the Umpqua Valley?

| Question	Disagree		Neither Agree nor Disagree		Agree		Total
I have purchased wines from the Umpqua Valley at my local retailer or a local restaurant/bar.	23%	22	17%	16	60%	57	95
I am very likely to recommend wines from the Umpqua Valley to others.	1%	1	18%	17	81%	78	96
I am very likely to recommend a trip to the Umpqua Valley to others.	0%	0	8%	8	92%	88	96

Trip Motivation & Satisfaction (Past Winery Visitors + Residents/B2)

Q2.3 - In general, which of the following reasons are most important to you in choosing which wineries to visit? Select up to 3. (n=3)

Answer	Count
Special event at the winery	3
Quality of the tasting room facility and ambiance	2
Offers winery or vineyard tours	2
Offers wines I know and/or like	1
Affordability of the experience	1
Natural beauty of property and setting	0
Offers small production wines only available at the winery	0
Offers highly rated wines	0
Opportunity to discover new wine producers	0
Sustainable winegrowing practices or organic production	0
Ease of access, easy to find	0
Other (please describe)	0
Offers a wide variety of wines	0

Q2.4 - In general, which of the following factors are most important to you for creating an enjoyable experience at a winery? Select up to 3. (n=4)
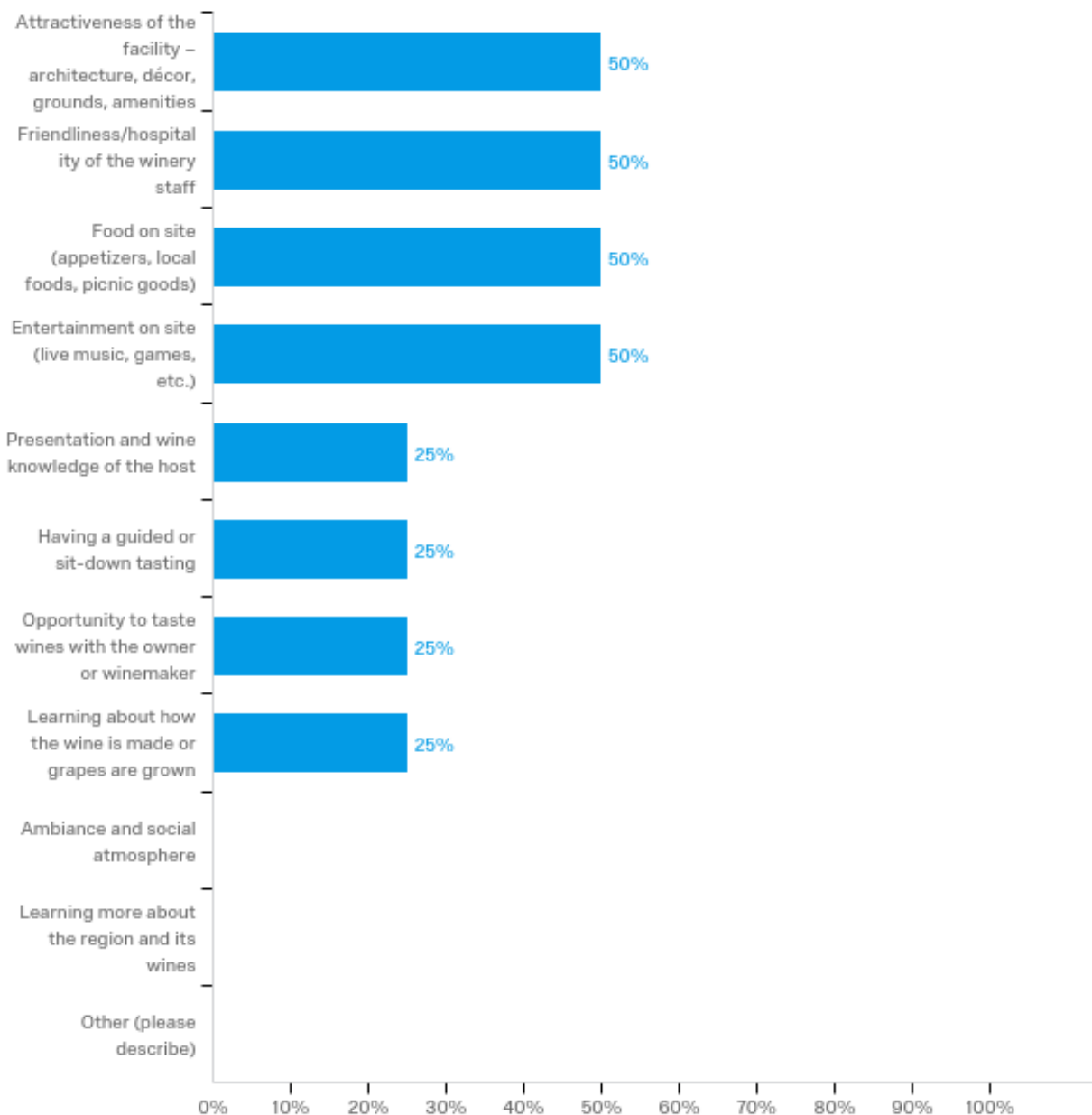
Answer	Count
Attractiveness of the facility – architecture, décor, grounds, amenities	2
Friendliness/hospitality of the winery staff	2
Entertainment on site (live music, games, etc.)	2
Food on site (appetizers, local foods, picnic goods)	2
Presentation and wine knowledge of the host	1
Having a guided or sit-down tasting	1
Learning about how the wine is made or grapes are grown	1
Opportunity to taste wines with the owner or winemaker	1
Learning more about the region and its wines	0
Ambiance and social atmosphere	0
Other (please describe)	0

Q2.5 - Which of the following resources do you typically use to select wineries and tasting rooms to visit? Select all that apply. (n=4)

Answer	%	Count
Free travel guidebook/brochure/map	75%	3
Website(s) of an individual winery or wineries	50%	2
Wine publication, online or in print (e.g. Wine Spectator, Wine & Spirits)	25%	1
Word of mouth (recommendation from friend/family, local resident, etc.)	25%	1
Websites of wineries or winery associations	25%	1
Other travel-related website	0%	0
Social Media (e.g. Facebook, Instagram, etc.)	0%	0
Magazine/newspaper (not wine-specific)	0%	0
Traditional travel agency	0%	0
Concierge or other hotel/B&B staff	0%	0
Mapping website (e.g. Google Maps)	0%	0
Visitors/welcome center	0%	0
Online travel agency (e.g. Expedia, Priceline)	0%	0
Road signs or billboards	0%	0
Restaurant, wine store, or retailer referral	0%	0
Commercial travel guidebook (e.g. Lonely Planet)	0%	0
Recommendation from a local restaurant	0%	0
Other (please specify)	0%	0
Reviews website (e.g. Yelp, TripAdvisor)	0%	0

Q2.6 - To the best of your recollection, how satisfied or dissatisfied were you with the following traits or features of your experience at wineries during your trip?

Question	Dissatisfied		Neither Satisfied nor Dissatisfied		Satisfied		Satisfaction varied greatly by winery		Don't Know		Total
Quality of the wines	0%	0	0%	0	25%	1	75%	3	0%	0	4
Value of the wines for their price	25%	1	25%	1	50%	2	0%	0	0%	0	4
Cost of tasting fees	25%	1	50%	2	25%	1	0%	0	0%	0	4
Ease of travel to and finding the wineries	0%	0	0%	0	75%	3	25%	1	0%	0	4
Natural beauty of properties and setting	0%	0	0%	0	50%	2	50%	2	0%	0	4
Attractiveness of the facilities – architecture, décor, grounds, amenities	0%	0	0%	0	25%	1	75%	3	0%	0	4
Presentation and knowledge of winery hosts	0%	0	0%	0	75%	3	25%	1	0%	0	4
Friendliness/hospitality of winery staff	0%	0	0%	0	75%	3	25%	1	0%	0	4

Q2.7 - What factors prevent you from returning to or visiting wineries in the Umpqua Valley more frequently? Select all that apply. (n=4)
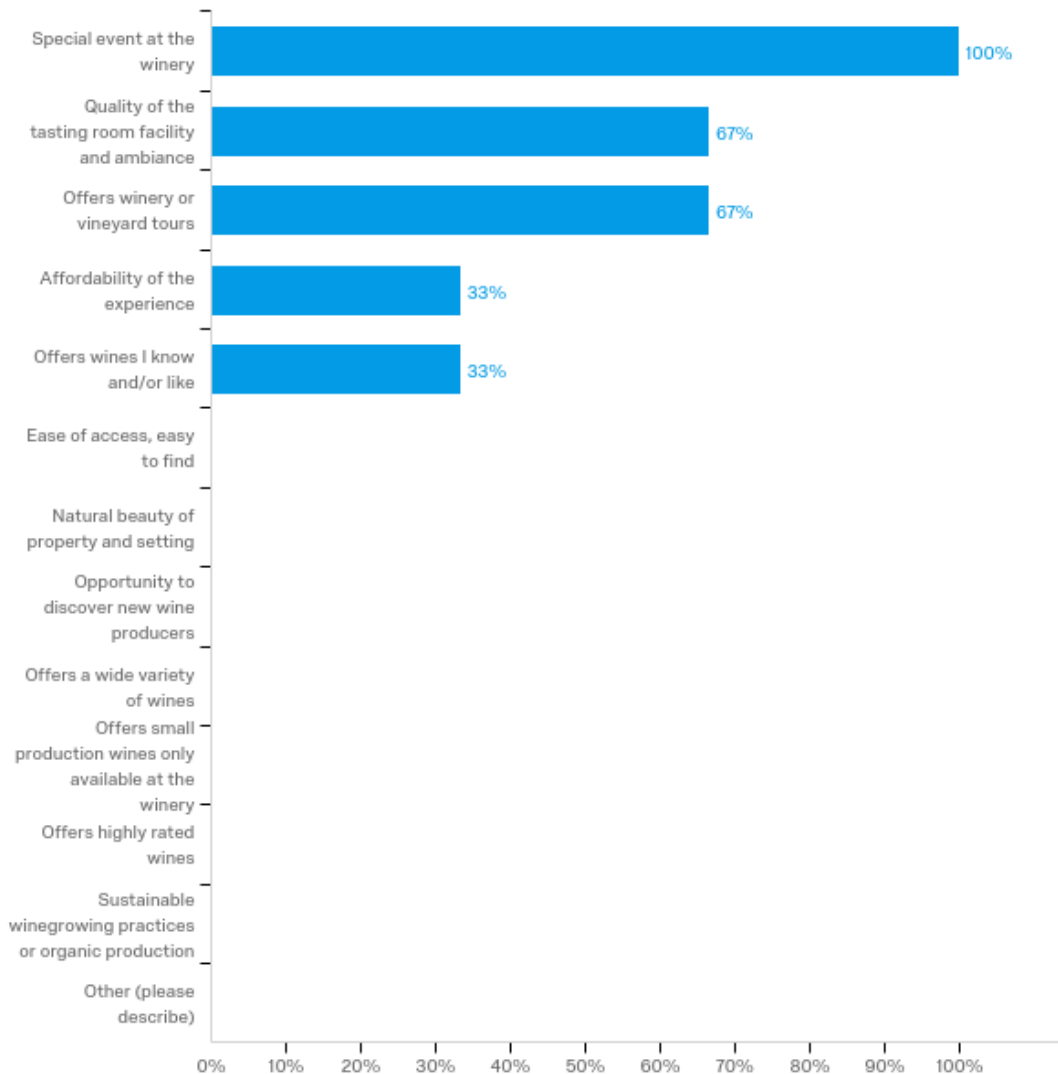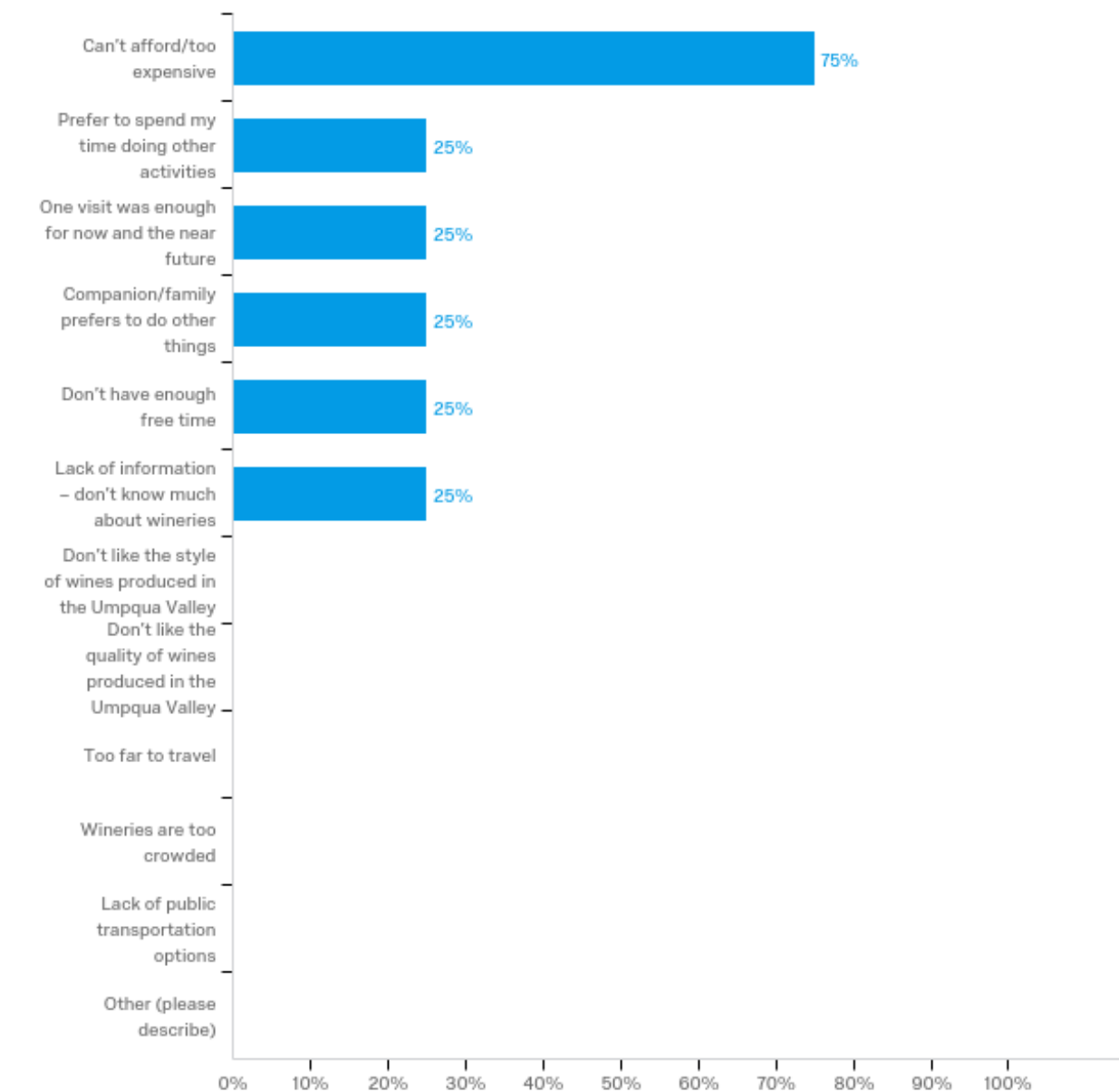

Answer	Count
Can't afford/too expensive	3
Don't have enough free time	1
Prefer to spend my time doing other activities	1
One visit was enough for now and the near future	1
Companion/family prefers to do other things	1
Lack of information – don't know much about wineries	1
Don't like the quality of wines produced in the Umpqua Valley	0
Too far to travel	0
Wineries are too crowded	0
Lack of public transportation options	0
Don't like the style of wines produced in the Umpqua Valley	0
Other (please describe)	0

Q2.8 - To what extent do you agree or disagree with the following statements, based on your most recent trip to wineries in the Umpqua Valley?

Question	Disagree		Neither Agree nor Disagree		Agree		Total
I have purchased wines from the Umpqua Valley at my local retailer or a local restaurant/bar.	0%	0	0%	0	100%	4	4
I am very likely to recommend wines from the Umpqua Valley to others.	25%	1	0%	0	75%	3	4
I am very likely to recommend a trip to the Umpqua Valley to others.	0%	0	0%	0	100%	4	4

Barriers to Visiting (Non-Winery + Region Visitor/C1)

QC1.1.1 - Do you enjoy visiting wineries and tasting rooms? (n=23)

Answer	Count
Yes	22
Don't know/never tried	1
No	0
Total	**23**

QC1.1.2 - In general, which of the following reasons are most important to you in choosing which wineries to visit? Select up to 3. (n=21)

Answer	Count
Natural beauty of property and setting	13
Quality of the tasting room facility and ambiance	9
Opportunity to discover new wine producers	8
Offers highly rated wines	7
Special event at the winery	6
Affordability of the experience	5
Offers wines I know and/or like	4
Ease of access, easy to find	3
Offers winery or vineyard tours	2
Sustainable winegrowing practices or organic production	2
Offers a wide variety of wines	2
Offers small production wines only available at the winery	1
Other (please describe)	0

QC1.1.3 - In general, which of the following reasons are most important to you in choosing which wineries to visit? Select up to 3. (n=21)
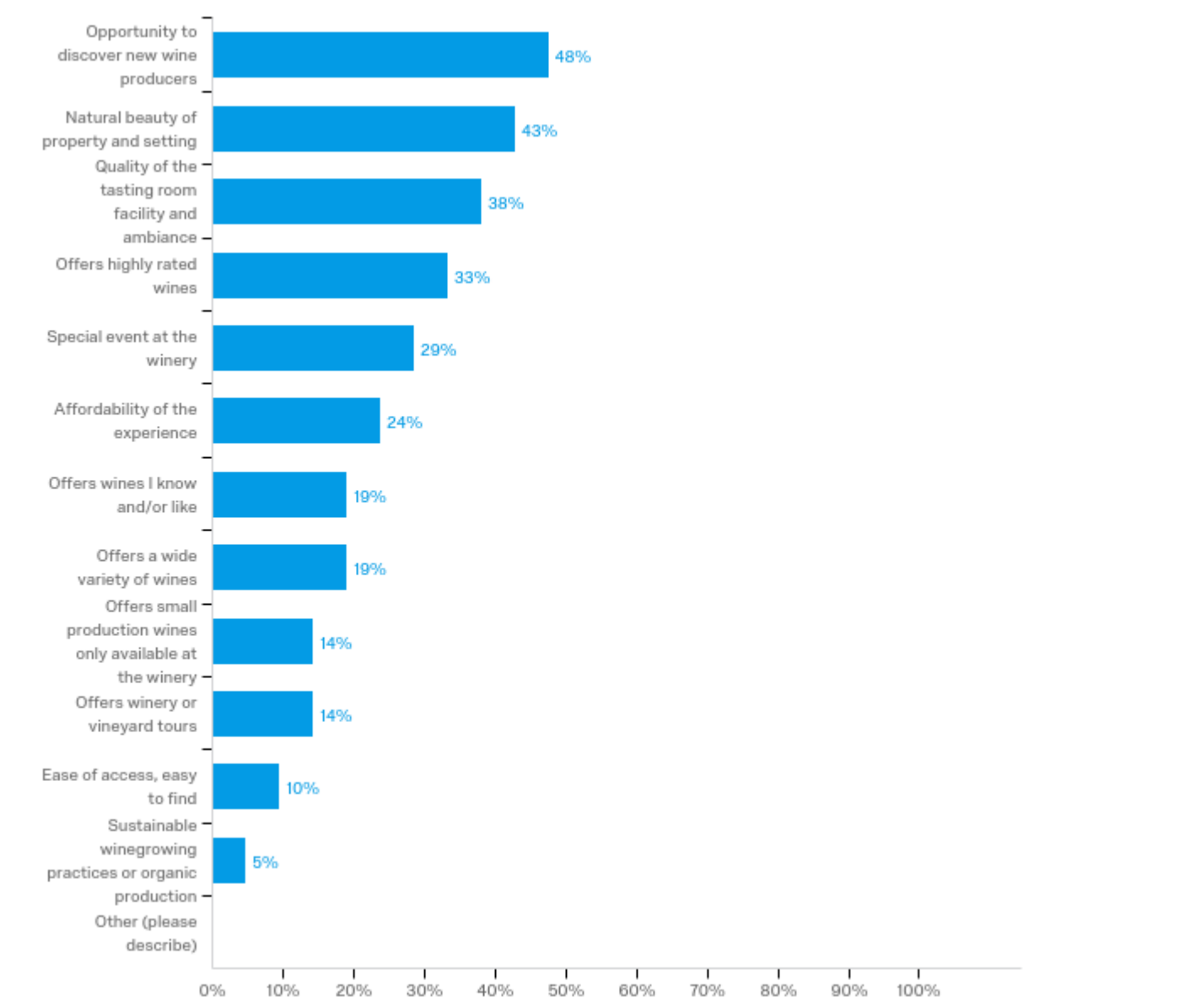
Answer	Count
Opportunity to discover new wine producers	10
Natural beauty of property and setting	9
Quality of the tasting room facility and ambiance	8
Offers highly rated wines	7
Special event at the winery	6
Affordability of the experience	5
Offers a wide variety of wines	4
Offers wines I know and/or like	4
Offers small production wines only available at the winery	3
Offers winery or vineyard tours	3
Ease of access, easy to find	2
Sustainable winegrowing practices or organic production	1
Other (please describe)	0

QC1.1.4 - What factors have prevented you from visiting a winery on your latest trip to the Umpqua Valley? Select all that apply. (n=20)
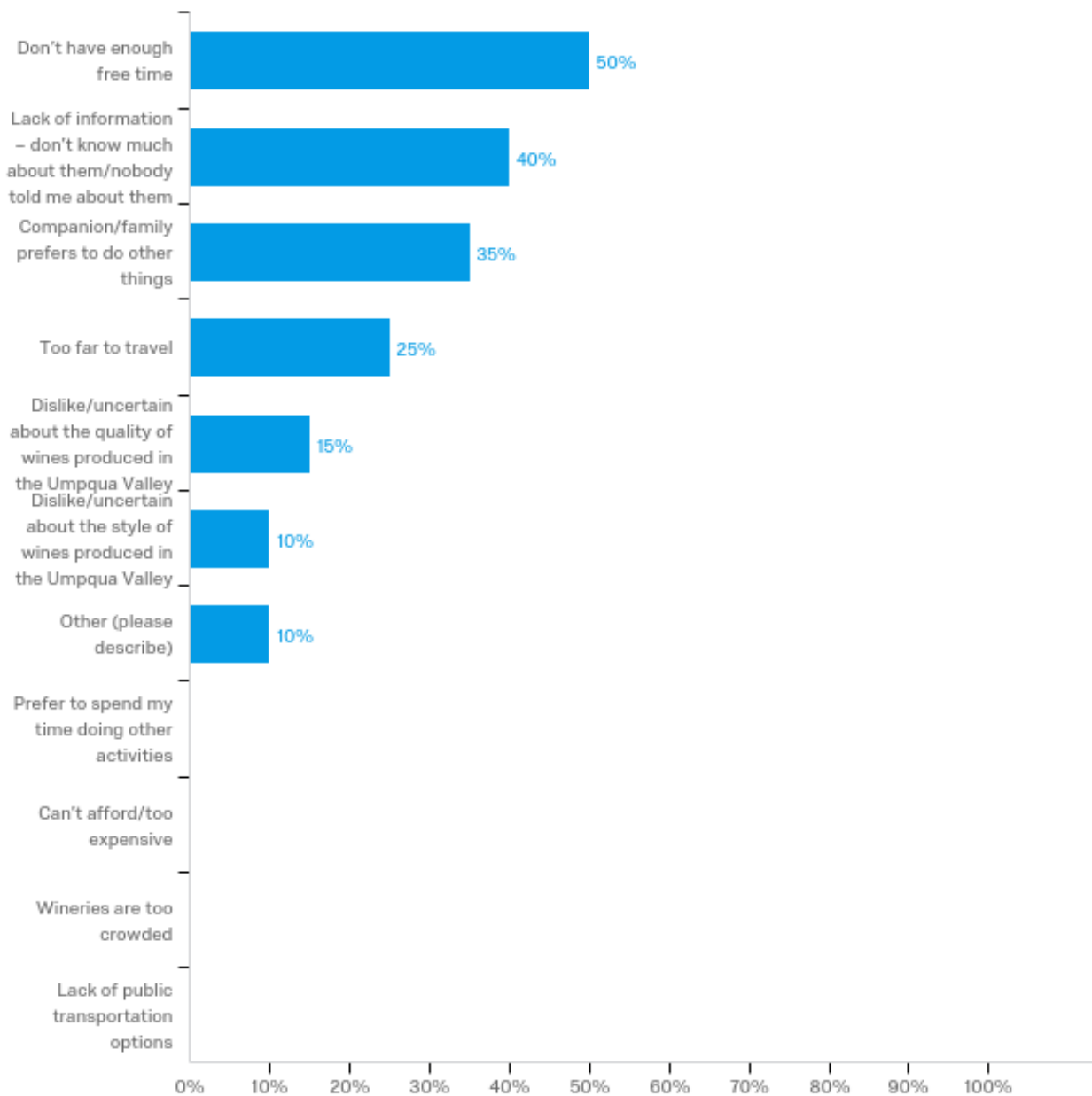
Answer	Count
Don't have enough free time	10
Lack of information – don't know much about them/nobody told me about them	8
Companion/family prefers to do other things	7
Too far to travel	5
Dislike/uncertain about the quality of wines produced in the Umpqua Valley	3
Dislike/uncertain about the style of wines produced in the Umpqua Valley	2
Other (please describe)	2
Can't afford/too expensive	0
Prefer to spend my time doing other activities	0
Wineries are too crowded	0
Lack of public transportation options	0

QC1.1.5 - Which of the following resources do you typically use to select wineries and tasting rooms to visit? Select all that apply. (n=20)

Answer	%	Count
Word of mouth (recommendation from friend/family, local resident, etc.)	75%	15
Free travel guidebook/brochure/map	40%	8
Social Media (e.g. Facebook, Instagram, etc.)	30%	6
Road signs or billboards	25%	5
Website(s) of an individual winery or wineries	25%	5
Wine publication, online or in print (e.g. Wine Spectator, Wine & Spirits)	25%	5
Mapping website (e.g. Google Maps)	20%	4
Restaurant, wine store, or retailer referral	20%	4
Recommendation from a local restaurant	20%	4
Magazine/newspaper (not wine-specific)	15%	3
Concierge or other hotel/B&B staff	15%	3
Websites of winery associations	15%	3
Reviews website (e.g. Yelp, TripAdvisor)	15%	3
Visitors/welcome center	10%	2
Other travel-related website	5%	1
Other (please specify)	5%	1
Traditional travel agency	0%	0
Online travel agency (e.g. Expedia, Priceline)	0%	0
Commercial travel guidebook (e.g. Lonely Planet)	0%	0

QC1.1.5b - Which social media platform? (n=6)
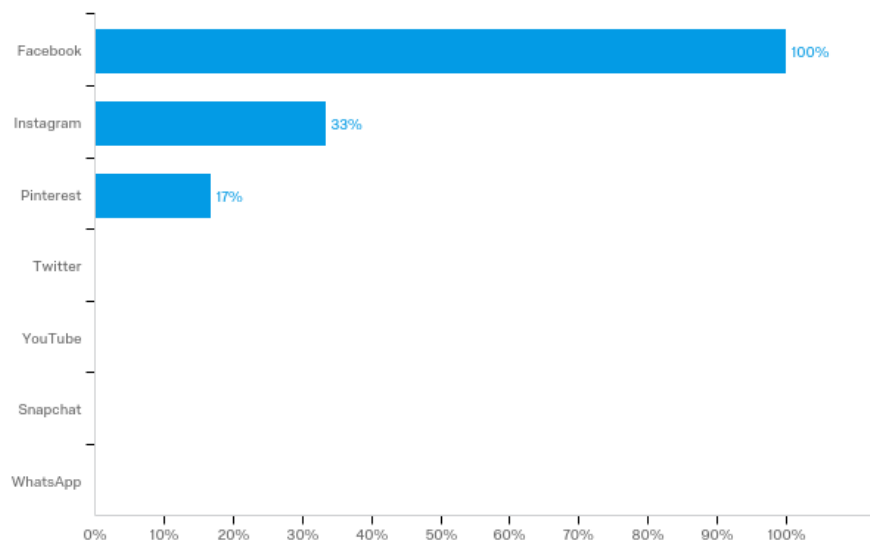
Answer	Count
Facebook	6
Instagram	2
Pinterest	1
Twitter	0
YouTube	0
Snapchat	0
WhatsApp	0

Demographics

Q4.1 - Where do you currently live? (n=723)

Answer	Count
USA	716
Outside the USA	7
Total	**723**

Q4.2 - What is your gender? (n=702)

Answer	Count
Female	425
Male	272
I prefer not to answer	5
Nonbinary	0
Total	**702**

Q4.3 - Which best describes your age? (n=704)
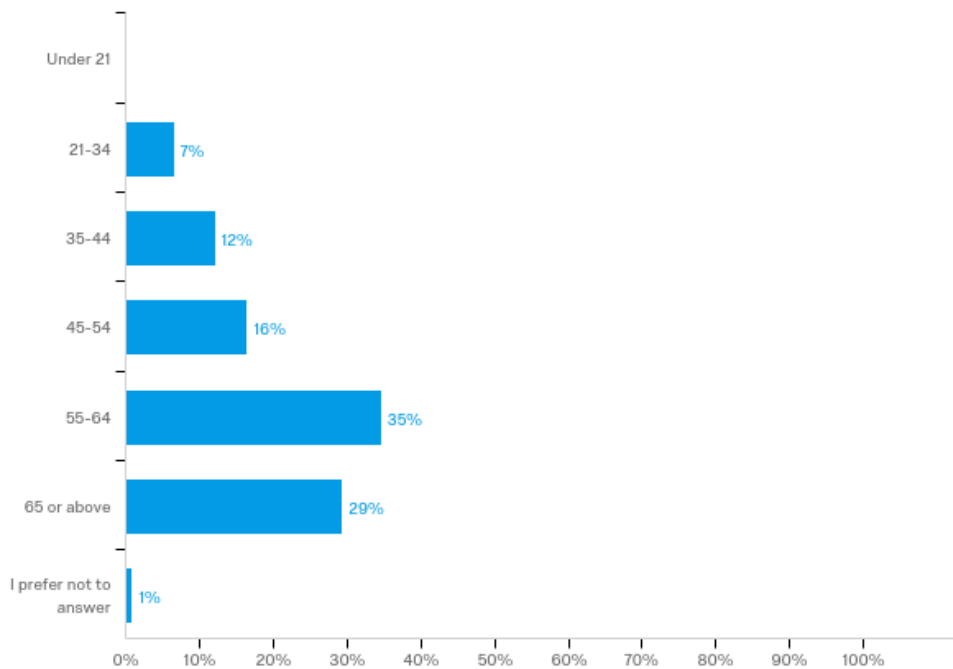
Answer	Count
55-64	244
65 or above	207
45-54	116
35-44	85
21-34	46
I prefer not to answer	6
Under 21	0
Total	**704**

Q4.4 - Which best describes the combined annual income of all members of your household? (n=722)
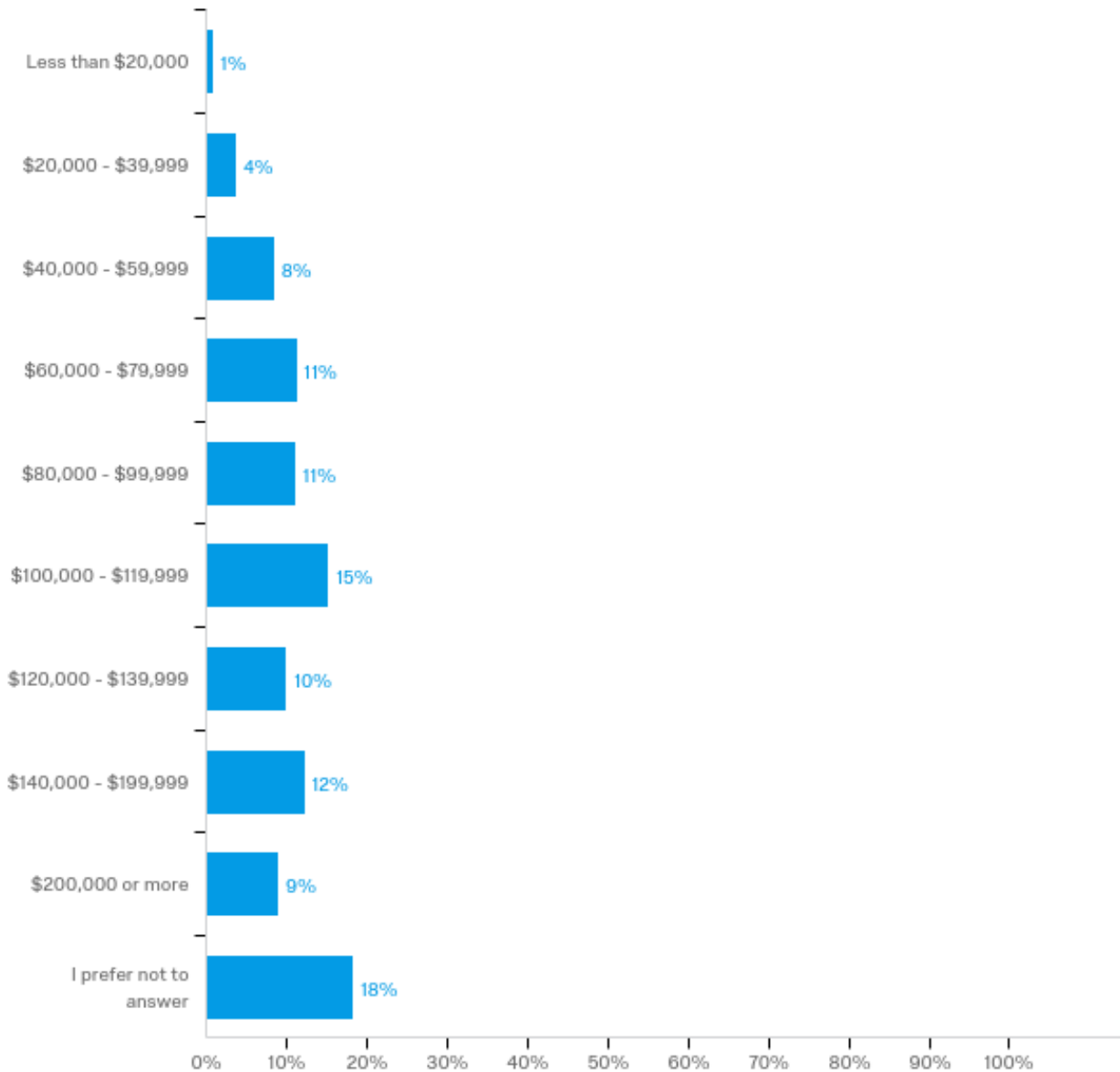
Answer	Count
Less than $20,000	6
$20,000 - $39,999	27
$40,000 - $59,999	61
$60,000 - $79,999	81
$80,000 - $99,999	80
$100,000 - $119,999	110
$120,000 - $139,999	72
$140,000 - $199,999	88
$200,000 or more	65
I prefer not to answer	132
Total	**722**

Q4.5 - Which best describes your race or ethnic background? Select all that apply. (n=724)
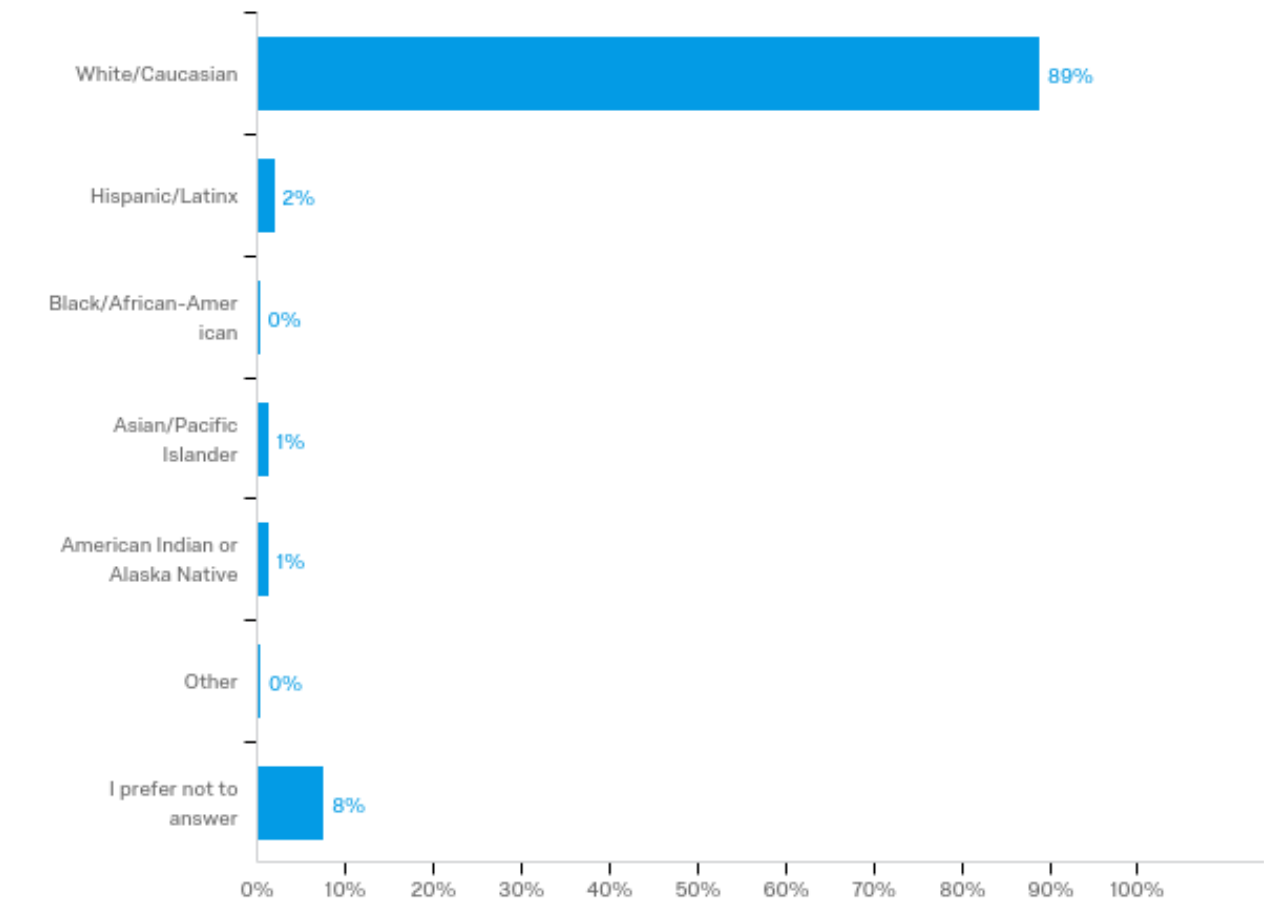
Answer	Count
White/Caucasian	644
I prefer not to answer	55
Hispanic/Latinx	14
Asian/Pacific Islander	9
American Indian or Alaska Native	9
Other	3
Black/African-American	2

Trip Motivation & Satisfaction (Non-Winery + Region Visitor/C1)

Q2.1 - How satisfied or dissatisfied were you with each of these qualities of the Umpqua Valley during your trip? Mark "N/A" if the quality did not apply to your trip.

Question	Dissatisfied		Neither Satisfied nor Dissatisfied		Satisfied		Total
Ease of traveling to the area from your home/starting point	12%	2	18%	3	71%	12	17
Affordability	0%	0	17%	3	83%	15	18
Quality of accommodations	0%	0	17%	2	83%	10	12
Ease of finding accommodations	0%	0	15%	2	85%	11	13
Opportunity to view/ experience local arts, culture, and history	8%	1	42%	5	50%	6	12
Opportunity to experience farms or farm products (including wine)	8%	1	31%	4	62%	8	13
High quality local cuisine/restaurants	13%	2	25%	4	63%	10	16
Area offers a wide variety of activities for my entire family	14%	2	29%	4	57%	8	14
Terrain/ geography/ climate is conducive to outdoor recreation activity	0%	0	13%	2	88%	14	16
Retail shopping	25%	2	38%	3	38%	3	8
Scenic beauty	0%	0	5%	1	95%	18	19

Q2.2 - How likely or unlikely are you to visit the Umpqua Valley again in the future? (n=20)
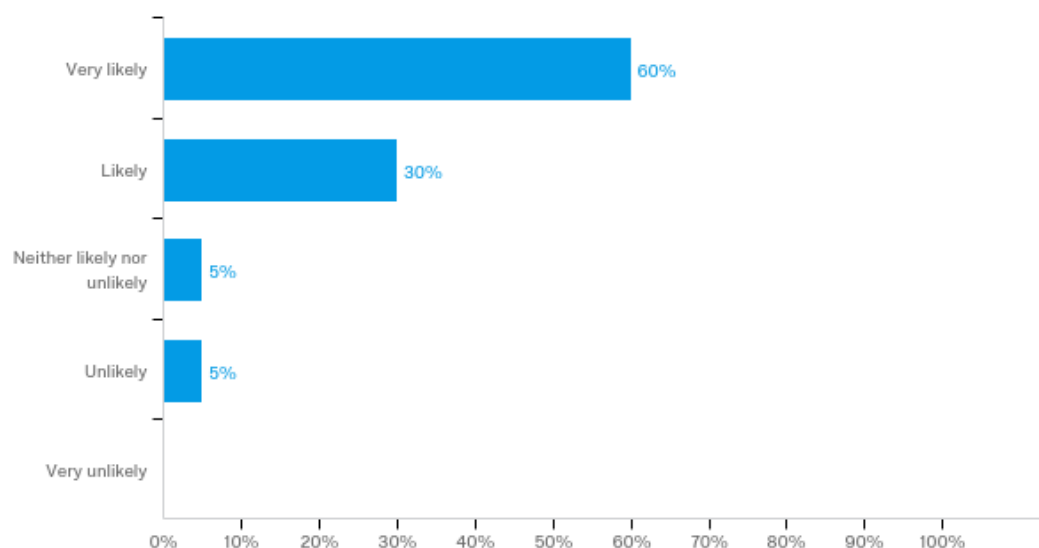
Answer	Count
Very likely	12
Likely	6
Neither likely nor unlikely	1
Unlikely	1
Very unlikely	0
Total	**20**

QC2.1.1 - Do you enjoy visiting wineries and tasting rooms? (n=2)

Answer	Count
No	1
Don't know/never tried	1
Yes	0
Total	**2**

QC2.1.2 - In general, which of the following reasons are most important to you in choosing which wineries to visit? Select up to 3. (n=1)

Answer	Count
Opportunity to discover new wine producers	1
Offers small production wines only available at the winery	1
Offers highly rated wines	1
Ease of access, easy to find	0
Quality of the tasting room facility and ambiance	0
Offers wines I know and/or like	0
Natural beauty of property and setting	0
Offers winery or vineyard tours	0
Sustainable winegrowing practices or organic production	0
Special event at the winery	0
Affordability of the experience	0
Other (please describe)	0
Offers a wide variety of wines	0

QC2.1.3 - In general, which of the following reasons are most important to you in choosing which wineries to visit? Select up to 3. (n=1)
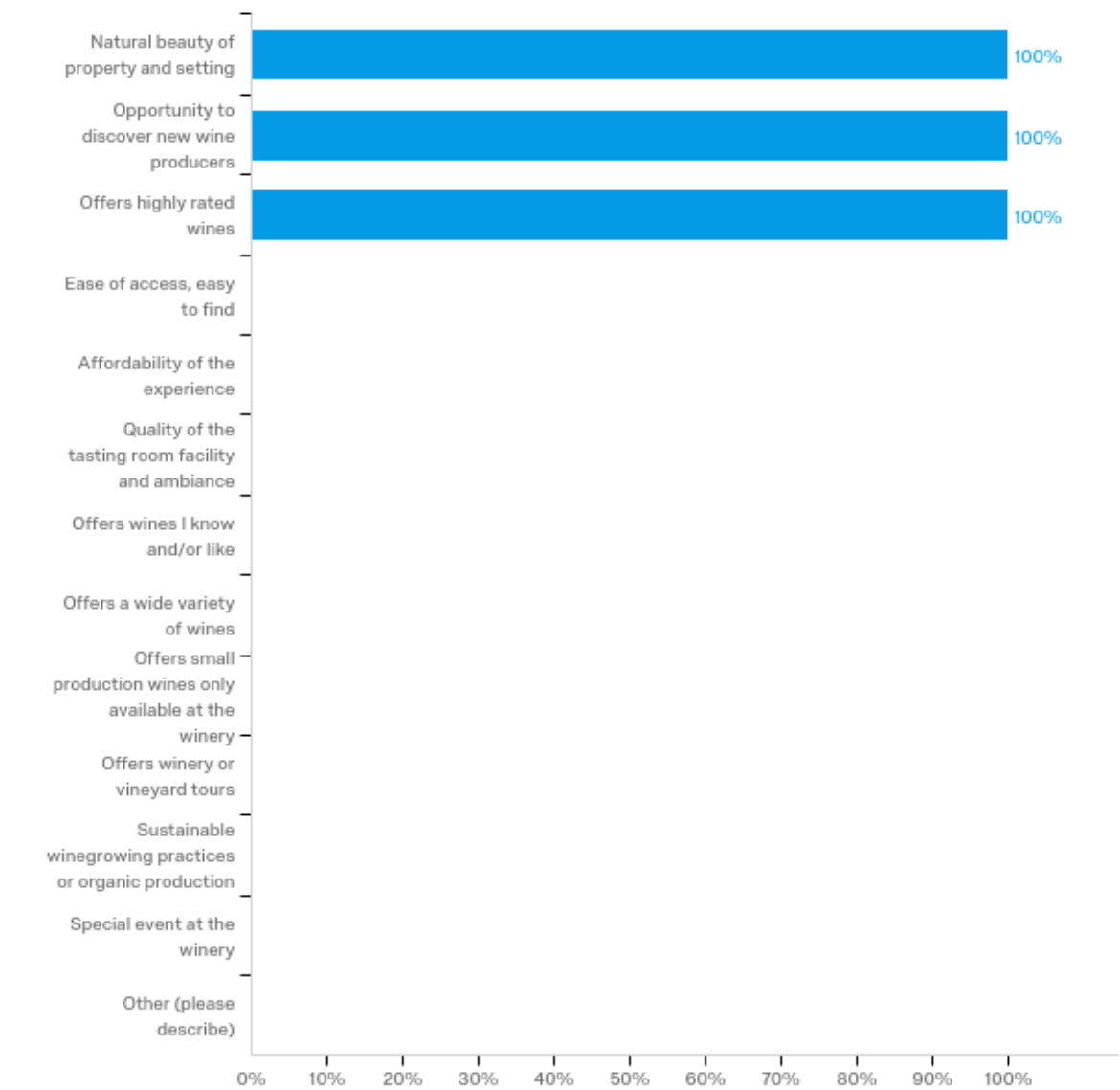
Answer	Count
Opportunity to discover new wine producers	1
Natural beauty of property and setting	1
Offers highly rated wines	1
Ease of access, easy to find	0
Quality of the tasting room facility and ambiance	0
Offers wines I know and/or like	0
Offers small production wines only available at the winery	0
Offers winery or vineyard tours	0
Sustainable winegrowing practices or organic production	0
Special event at the winery	0
Affordability of the experience	0
Other (please describe)	0
Offers a wide variety of wines	0

QC2.1.4 - What factors have prevented you from visiting a winery in the Umpqua Valley? Select all that apply. (n=1)

Answer	Count
Companion/family prefers to do other things	1
Lack of information – don't know much about them/nobody told me about them	1
Lack of public transportation options	1
Dislike/uncertain about the style of wines produced in the Umpqua Valley	0
Prefer to spend my time doing other activities	0
Can't afford/too expensive	0
Dislike/uncertain about the quality of wines produced in the Umpqua Valley	0
Too far to travel	0
Wineries are too crowded	0
Other (please describe)	0
Don't have enough free time	0

QC2.1.5 - Which of the following resources do you typically use to select wineries and tasting rooms to visit? Select all that apply. (n=1)

Answer	%	Count
Websites of winery associations	100%	1
Word of mouth (recommendation from friend/family, local resident, etc.)	100%	1
Recommendation from a local restaurant	100%	1
Website(s) of an individual winery or wineries	100%	1
Road signs or billboards	100%	1
Restaurant, wine store, or retailer referral	100%	1
Social Media (e.g. Facebook, Instagram, etc.)	0%	0
Mapping website (e.g. Google Maps)	0%	0
Traditional travel agency	0%	0
Concierge or other hotel/B&B staff	0%	0
Other travel-related website	0%	0
Visitors/welcome center	0%	0
Online travel agency (e.g. Expedia, Priceline)	0%	0
Wine publication, online or in print (e.g. Wine Spectator, Wine & Spirits)	0%	0
Magazine/newspaper (not wine-specific)	0%	0
Commercial travel guidebook (e.g. Lonely Planet)	0%	0
Free travel guidebook/brochure/map	0%	0
Other (please specify)	0%	0
Reviews website (e.g. Yelp, TripAdvisor)	0%	0

QD1.1 - Do you enjoy visiting wineries and tasting rooms? (n=39)

Answer	Count
Yes	38
No	1
Don't know/never tried	0
Total	**39**

QD1.2 - In general, which of the following reasons are most important to you in choosing which wineries to visit? Select up to 3. (n=37)
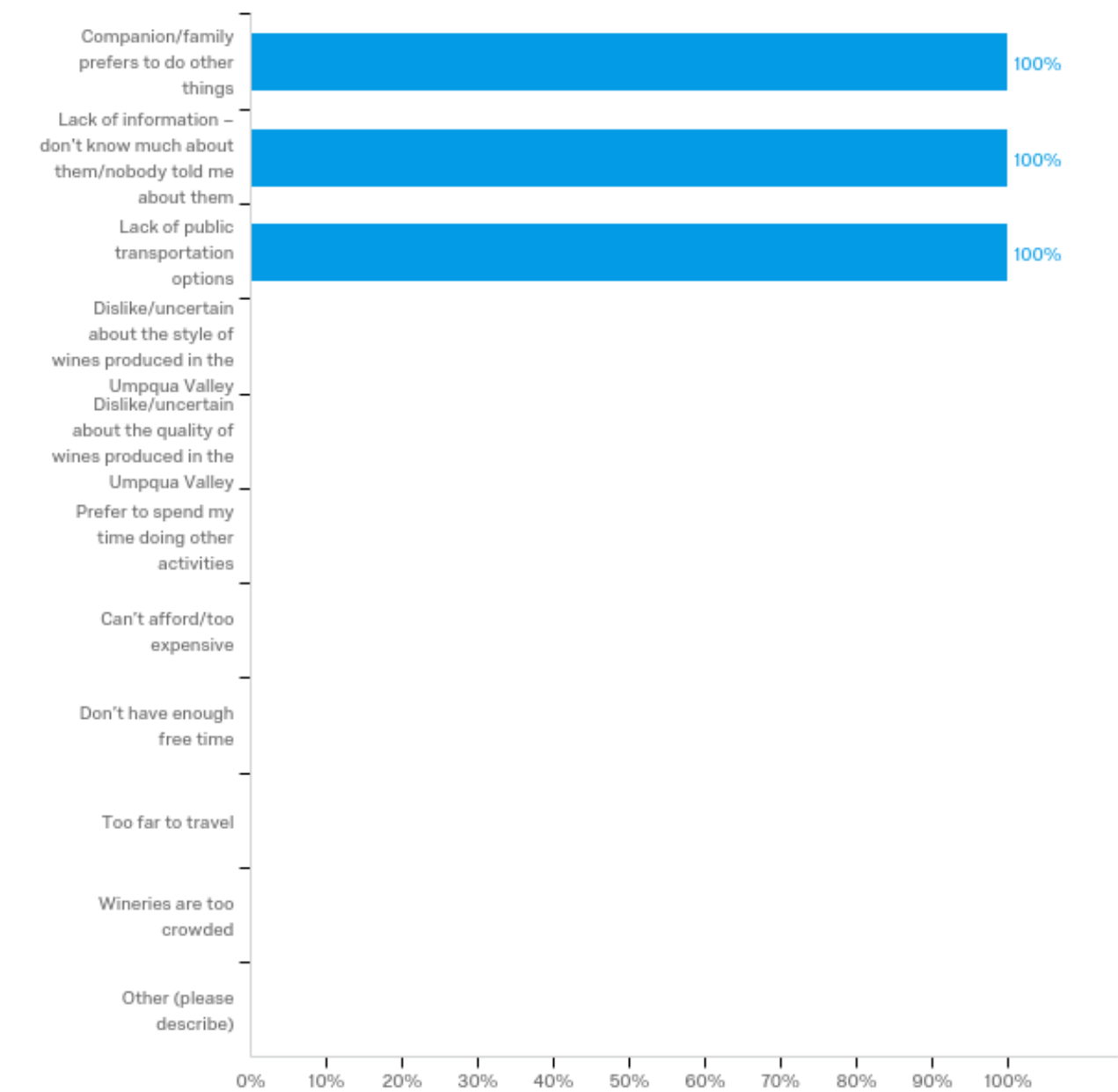

Answer	Count
Opportunity to discover new wine producers	19
Natural beauty of property and setting	16
Quality of the tasting room facility and ambiance	13
Affordability of the experience	12
Offers wines I know and/or like	11
Offers highly rated wines	8
Offers a wide variety of wines	7
Offers small production wines only available at the winery	6
Special event at the winery	6
Ease of access, easy to find	4
Sustainable winegrowing practices or organic production	2
Other (please describe)	2
Offers winery or vineyard tours	1

QD1.3 - In general, which of the following factors are most important to you for creating an enjoyable experience at a winery? Select up to 3. (n=37)
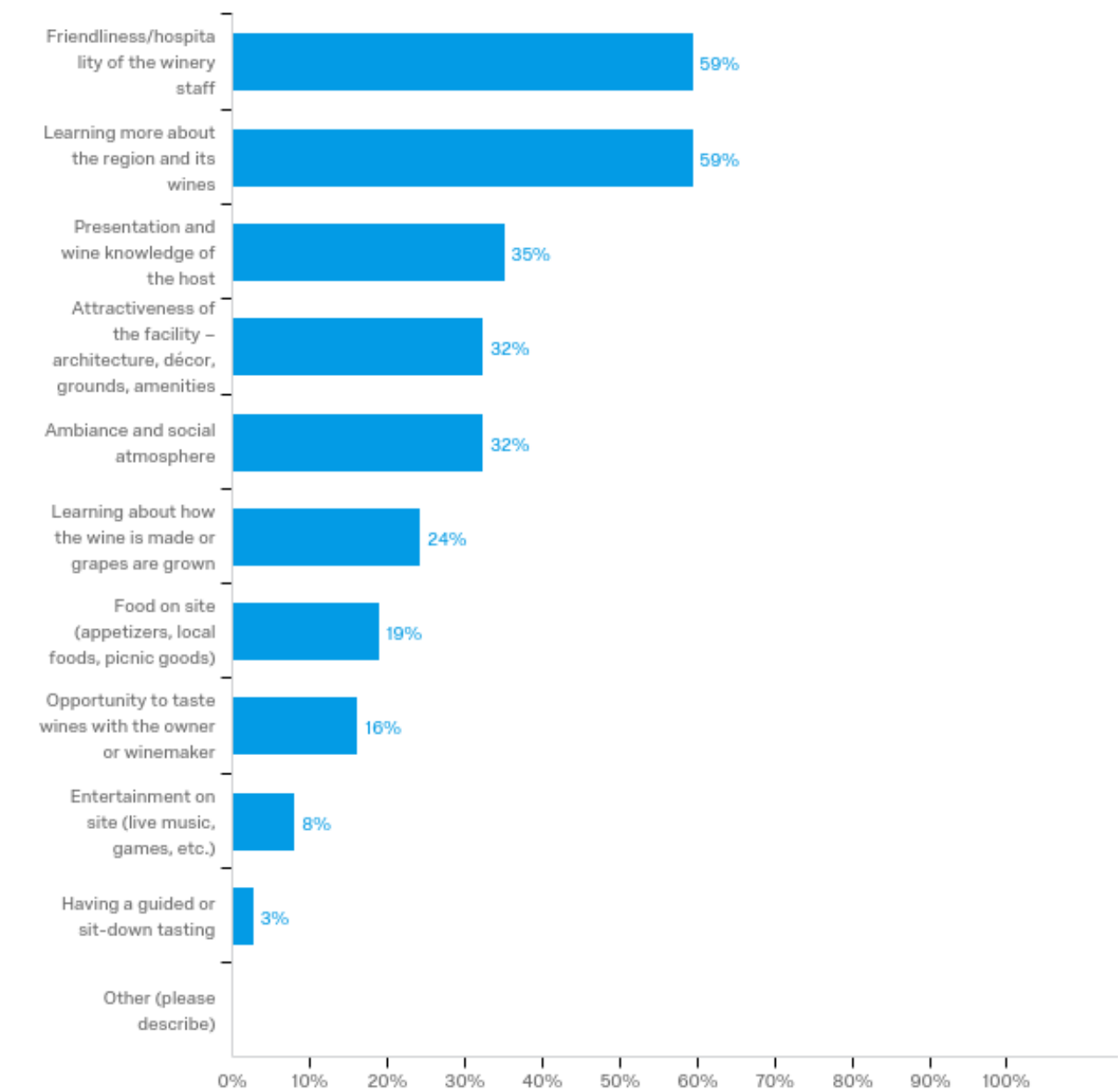
Answer	Count
Friendliness/hospitality of the winery staff	22
Learning more about the region and its wines	22
Presentation and wine knowledge of the host	13
Attractiveness of the facility – architecture, décor, grounds, amenities	12
Ambiance and social atmosphere	12
Learning about how the wine is made or grapes are grown	9
Food on site (appetizers, local foods, picnic goods)	7
Opportunity to taste wines with the owner or winemaker	6
Entertainment on site (live music, games, etc.)	3
Having a guided or sit-down tasting	1
Other (please describe)	0

QD1.4 - What factors have prevented you from visiting the Umpqua Valley? Select all that apply. (n=34)

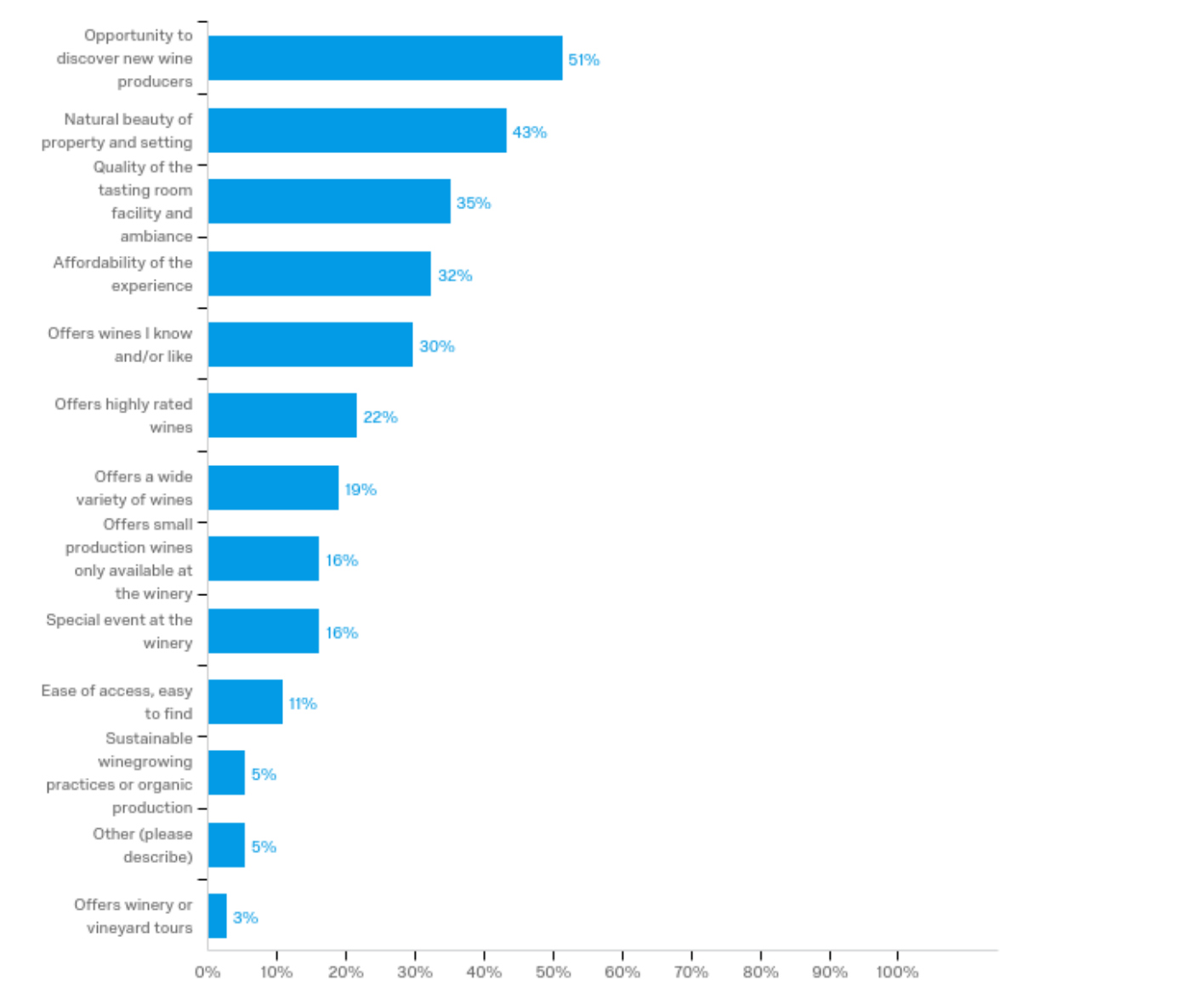| Answer	%	Count
Too far to travel	65%	22
Lack of information – don't know much about the area	53%	18
Don't have enough free time	24%	8
Companion/family prefers to do other things	15%	5
Prefer to go somewhere else	12%	4
Can't afford/too expensive	6%	2
The area is too crowded	6%	2
Lack of convenient or fairly priced transportation options to travel to the area from your home	6%	2
Lack of convenient or fairly priced transportation options for getting around the area once you've arrived	3%	1
Other (please describe)	3%	1
Doesn't provide the kind of activities/experiences I am seeking	3%	1
Poor weather or climate	0%	0

QD1.5 - Which of the following resources do you typically use to select wineries and tasting rooms to visit? Select all that apply. (n=37)

Answer	%	Count
Word of mouth (recommendation from friend/family, local resident, etc.)	62%	23
Website(s) of an individual winery or wineries	38%	14
Wine publication, online or in print (e.g. Wine Spectator, Wine & Spirits)	30%	11
Road signs or billboards	27%	10
Magazine/newspaper (not wine-specific)	24%	9
Websites of winery associations	22%	8
Free travel guidebook/brochure/map	22%	8
Reviews website (e.g. Yelp, TripAdvisor)	22%	8
Restaurant, wine store, or retailer referral	16%	6
Recommendation from a local restaurant	16%	6
Mapping website (e.g. Google Maps)	11%	4
Commercial travel guidebook (e.g. Lonely Planet)	11%	4
Other (please specify)	11%	4
Visitors/welcome center	8%	3
Social Media (e.g. Facebook, Instagram, etc.)	8%	3
Other travel-related website	8%	3
Concierge or other hotel/B&B staff	3%	1
Traditional travel agency	0%	0
Online travel agency (e.g. Expedia, Priceline)	0%	0

QD1.5b - Which social media platform? (n=3)
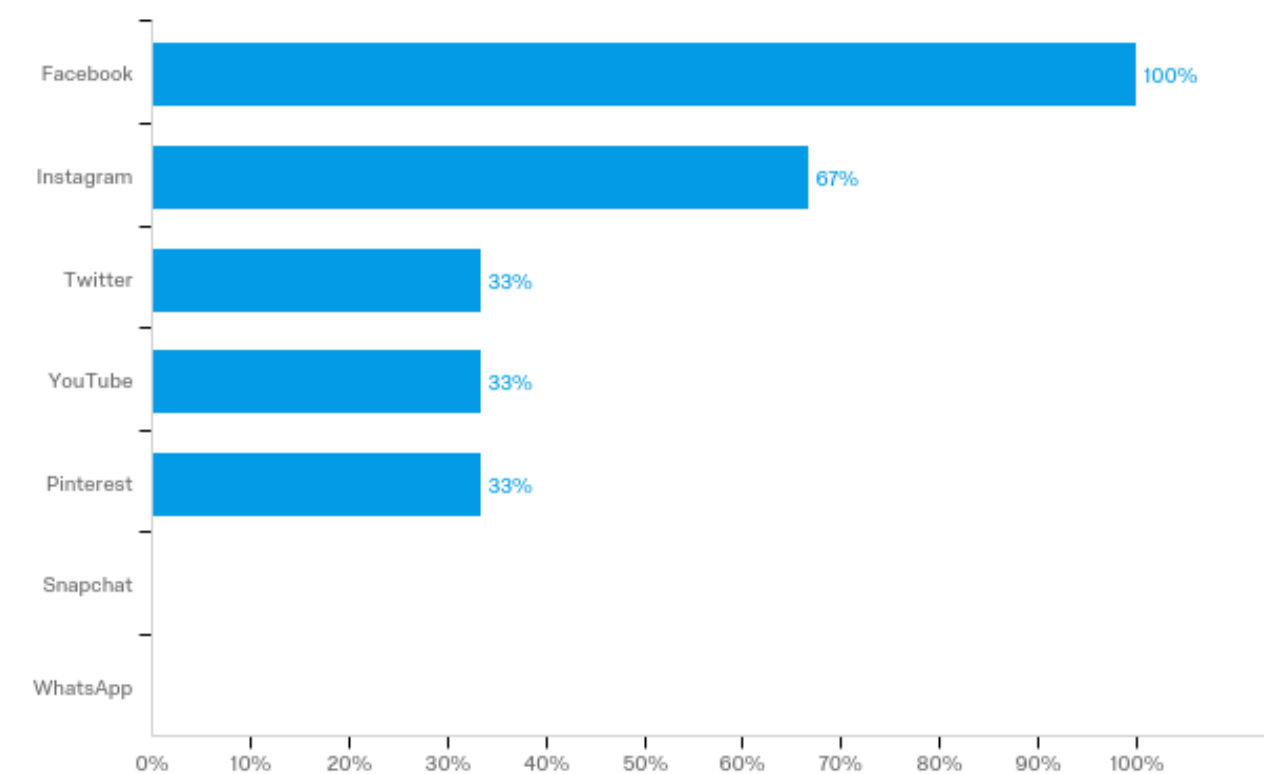
Answer	Count
Facebook	3
Instagram	2
Twitter	1
YouTube	1
Pinterest	1
Snapchat	0
WhatsApp	0

QD1.6 - How important or unimportant are the following factors in your decisions about places to visit/trips to take?

Question	Not important		Neither Unimportant nor Important		Important		Total
A place to relax and unwind	0%	0	28%	10	72%	26	36
Ease of traveling to the area from your home/starting point	11%	4	33%	12	56%	20	36
Affordability	6%	2	25%	9	69%	25	36
Quality of accommodations	0%	0	33%	12	67%	24	36
Ease of finding of accommodations	3%	1	44%	16	53%	19	36
Opportunity to attend a festival or special event	14%	5	54%	19	31%	11	35
Opportunity to view/ experience local arts, culture, and history	14%	5	49%	17	37%	13	35
Opportunity to visit parks, wilderness, and natural wonders	17%	6	42%	15	42%	15	36
Opportunity to experience farms or farm products (excluding wine)	29%	10	51%	18	20%	7	35
Opportunity to experience the area's wineries and wine culture	3%	1	25%	9	72%	26	36
High quality local cuisine/restaurants	11%	4	39%	14	50%	18	36
Area offers a wide variety of activities for my entire family	35%	12	47%	16	18%	6	34
Terrain/ geography/ climate is conducive to outdoor recreation activity	6%	2	51%	18	43%	15	35
Retail shopping	46%	16	49%	17	6%	2	35
Scenic beauty	0%	0	19%	7	81%	30	37

Other Wine Regions

Q3.1 - In general, how would you rate the quality of the wine from the following regions?

Question	One of the Best		Excellent		Good		Average		Poor quality		Undecided/ Not familiar with the wines		Total
Rogue Valley	6%	40	31%	221	30%	212	6%	40	0%	3	28%	202	718
Umpqua Valley	22%	159	50%	366	22%	164	2%	12	0%	0	4%	31	732
Willamette Valley	19%	142	46%	338	22%	162	5%	38	0%	1	7%	53	734
Columbia Gorge	5%	35	27%	193	35%	251	6%	41	1%	4	27%	196	720
Walla Walla Valley	14%	101	31%	223	17%	119	4%	27	0%	0	35%	249	719
Napa Valley	18%	133	37%	270	22%	161	6%	47	1%	4	15%	111	726
Paso Robles	8%	54	23%	165	17%	120	5%	39	0%	2	47%	340	720

Q3.2 - In general, how would you rate the following regions as a leisure travel/vacation/getaway destination for wine tasting?

Question	One of the Best		Excellent		Good		Average		Poor quality		Undecided/ Not familiar with the region		Total
Rogue Valley	5%	39	30%	219	32%	231	7%	49	1%	7	25%	177	722
Umpqua Valley	16%	117	35%	258	34%	252	8%	59	1%	10	5%	38	734
Willamette Valley	13%	98	41%	300	30%	217	6%	46	0%	2	9%	68	731
Columbia Gorge	6%	43	27%	195	30%	218	7%	48	0%	2	30%	216	722
Walla Walla Valley	9%	67	20%	146	20%	143	7%	50	1%	5	43%	308	719
Napa Valley	17%	123	29%	209	23%	166	7%	52	1%	10	23%	167	727
Paso Robles	5%	38	16%	114	16%	116	5%	39	1%	5	57%	406	718

Q3.3 - What attributes would you associate with each of these three region's wines? Select all that apply, or select "I don't know enough about this region to select attributes" and move on to the next question.

Question	Umpqua Valley		Willamette Valley		Rogue Valley		Total
I don't know enough about this region to select attributes	18%	85	25%	119	58%	279	483
Produces a wide variety of wines	45%	469	31%	323	23%	241	1033
Many small artisanal producers	43%	469	32%	350	24%	264	1083
Sustainable, organic, or ecologically beneficial growing practices	40%	298	39%	294	21%	162	754
A reliable choice, even if you aren't familiar with the specific winery	40%	372	40%	373	19%	180	925
Prestigious or highly regarded by knowledgeable wine consumers	33%	243	52%	386	15%	108	737
Different from other regions, a distinct style	47%	347	29%	215	24%	176	738
The wines are good value for the money	50%	469	26%	241	24%	227	937

Q3.4 - How strongly do you associate each of the following varieties with the Umpqua Valley?

Question	Not at all associated		Somewhat associated		Strongly associated		Total
Pinot Noir	10%	59	32%	186	58%	335	580
Chardonnay	28%	131	55%	255	17%	80	466
Riesling	19%	90	50%	240	31%	148	478
Pinot Gris or Pinot Grigio	15%	74	51%	261	34%	175	510
Cabernet Sauvignon	15%	75	51%	260	34%	174	509
Tempranillo	4%	20	20%	110	77%	430	560
Syrah	5%	24	39%	208	56%	298	530
Red Blends	4%	20	34%	192	62%	352	564
Viognier	10%	50	46%	225	44%	213	488
Sparkling	54%	215	40%	158	6%	22	395
Gewurztraminer	25%	106	54%	231	21%	88	425
Zinfandel	41%	185	43%	193	16%	73	451

Q3.6 - How frequently do you drink wines from the following wine-growing areas? Please choose the frequency that most closely describes you.

Question	Weekly		Monthly		Every 2-3 months		Less often		Never or never heard of		Total
Oregon (all regions)	53%	349	31%	206	7%	49	9%	57	0%	1	662
Washington (all regions)	14%	92	28%	179	23%	152	30%	198	4%	29	650
Willamette Valley	26%	166	28%	181	22%	145	22%	142	2%	14	648
Rogue Valley	5%	34	15%	92	20%	125	47%	299	13%	84	634
Umpqua Valley	33%	217	30%	193	20%	130	16%	105	1%	9	654
Columbia Gorge	5%	29	18%	114	22%	141	45%	286	11%	67	637
Walla Walla Valley	4%	25	15%	99	24%	151	41%	266	16%	100	641
Napa Valley	6%	40	17%	112	21%	139	48%	314	7%	48	653
Sonoma County	7%	43	17%	108	22%	140	47%	304	8%	51	646