

OREGON WINERY VISITOR PROFILE

Rogue Valley Data Appendix

October 2019



Prepared by
The University of Oregon
Institute for Policy Research & Engagement
School of Planning, Public Policy, and Management

Table of Contents

SURVEY LOGIC	6
INITIAL SURVEY FLOW	6
SURVEY RESPONDENT GROUPS	7
ROGUE VALLEY SURVEY RESPONSES	8
SCREENER QUESTIONS	8
SQ1 - ON AVERAGE, HOW OFTEN DO YOU DRINK WINE? (N= 3303)	8
SQ2 - HAVE YOU EVER SPENT TIME IN THE ROGUE VALLEY? PLEASE REFER TO THE MAP BELOW TO SEE THE ROGUE VALLEY BOUNDARIES. (N=3233)	9
SQ2B - HOW LONG AGO WAS YOUR MOST RECENT VISIT? (N=1153)	9
SQ3 - HAVE YOU EVER VISITED A WINERY TASTING ROOM FOR THE PURPOSE OF TASTING OR BUYING WINES IN THE ROGUE VALLEY? (N=3000)	10
SQ4 - DURING WHICH MONTH(S) DID YOU VISIT A WINERY OR WINERIES IN THE ROGUE VALLEY? CHECK ALL THAT APPLY. (N=2560)	10
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.	11
ABOUT YOUR TRIP (ALL RECENT WINERY VISITORS/A1&A2)	12
Q1.1 - WHICH OF THE FOLLOWING BEST DESCRIBES YOUR TRIP? (N=2560)	12
Q1.1B - DID YOU TRAVEL MORE THAN 50 MILES FROM YOUR HOME TO VISIT A WINERY ON THIS TRIP? (N=2199)	13
Q1.1C - WAS THE PRIMARY PURPOSE OF YOUR TRIP TO VISIT A WINERY OR WINERIES? (N=1895)	13
Q1.2 - ON THIS TRIP, DID YOU STAY OVERNIGHT IN THE ROGUE VALLEY ANYWHERE OUTSIDE YOUR HOME? (N=2552)	13
Q1.2B - HOW MANY NIGHTS AWAY FROM HOME DID YOU STAY IN THE ROGUE VALLEY? (N=516)	13
Q1.2C - WHERE DID YOU STAY OVERNIGHT WHILE IN THE ROGUE VALLEY? (N=635)	14
Q1.4 - HOW MANY WINERIES DID YOU VISIT TO TASTE OR BUY WINE AT AS PART OF YOUR TRIP? (N=2219)	15
Q1.5 - WHICH MODES OF TRANSPORTATION DID YOU USE DURING YOUR TRIP TO GET TO WINERIES? SELECT ALL THAT APPLY. (N=2509)	16
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=2462)	17
Q1.6A - HOW DID YOU GET YOUR FREE TRAVEL GUIDEBOOK/BROCHURE/MAP? (N=218)	18
Q1.6B - WHICH SOCIAL MEDIA PLATFORM DID YOU USE? (N=205)	18
Q1.7 - WHAT OTHER ACTIVITIES DID YOU PARTICIPATE IN WHILE IN THE ROGUE VALLEY AS PART OF YOUR TRIP? SELECT ALL THAT APPLY. (N=1950)	19
Q1.7A - WHAT TYPE OF FESTIVAL, SPECIAL EVENT, OR PERFORMANCE DID YOU ATTEND? SELECT ALL THAT APPLY. (N=605)	20
Q1.7B - WHAT TYPE OF OUTDOOR RECREATION DID YOU DO? SELECT ALL THAT APPLY. (N=529)	21
Q1.8 - WHICH OTHER OREGON DESTINATIONS OUTSIDE OF THE ROGUE 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=699)	22
Q1.9 - PLEASE TELL US APPROXIMATELY HOW MUCH YOUR PARTY SPENT IN THE ROGUE VALLEY PER DAY ON THE FOLLOWING ITEMS DURING THIS TRIP.	23
Q1.10 - PLEASE TELL US APPROXIMATELY HOW MUCH YOUR PARTY SPENT AT WINERY TASTING ROOMS EXCLUSIVELY IN THE ROGUE VALLEY PER DAY DURING THIS TRIP.	23
Q1.11 - HOW MANY BOTTLES OF WINE DID YOU BUY AT WINERIES DURING THIS TRIP (NOT INCLUDING WINE CLUB SHIPMENTS)?	23

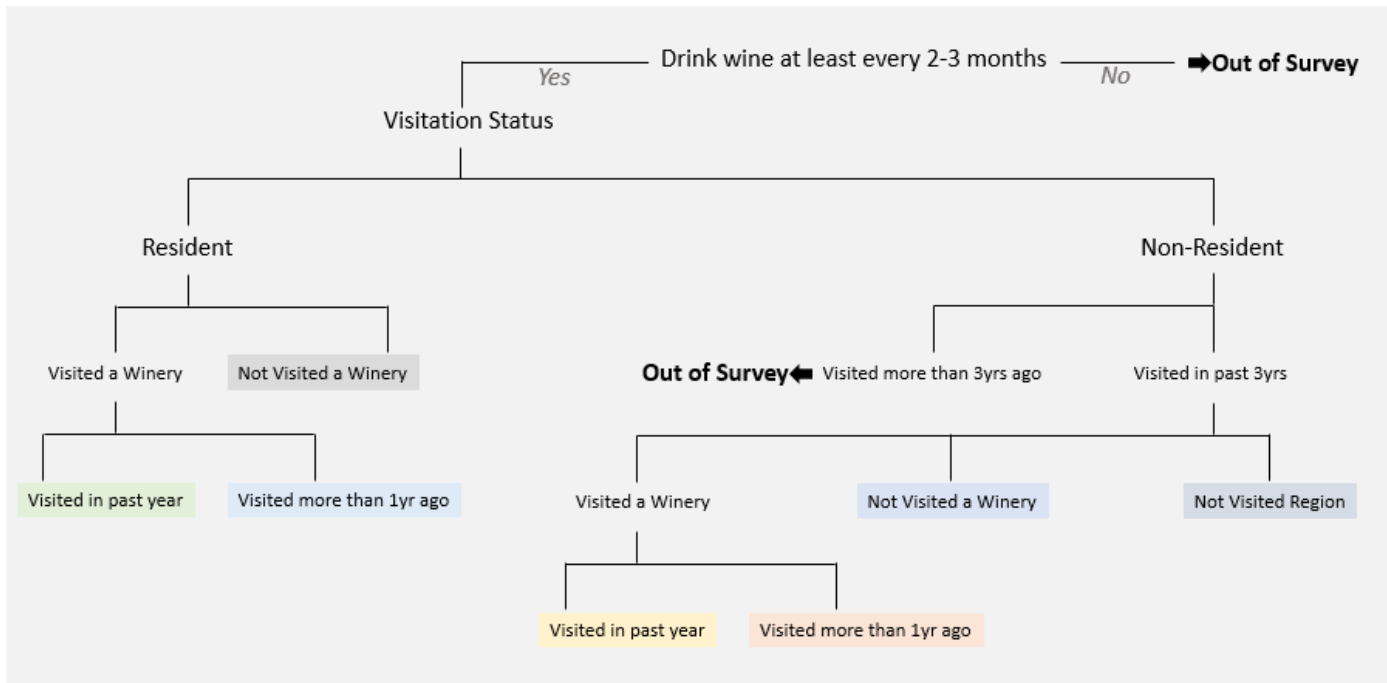
Q1.11B - WHAT WERE YOUR REASONS FOR NOT PURCHASING BOTTLES OF WINE ON YOUR TRIP? SELECT ALL THAT APPLY. (N=256)	24
Q1.12 - PRIOR TO YOUR VISIT, WERE YOU A MEMBER OF ANY WINE CLUBS OF WINERIES IN THE ROGUE VALLEY? (N=2359)	24
Q1.13 - HOW MANY WINE CLUBS DID YOU SIGN UP FOR DURING YOUR TRIP? (N=2097)	25
Q1.13B - WHAT WERE YOUR REASONS FOR NOT SIGNING UP FOR A WINE CLUB ON YOUR TRIP? SELECT ALL THAT APPLY. (N=1547)	26
TRIP MOTIVATION & SATISFACTION (RECENT WINE + REGION VISITORS/A1)	27
Q2.1 - HOW SATISFIED OR DISSATISFIED WERE YOU WITH EACH OF THESE QUALITIES OF THE ROGUE VALLEY DURING YOUR TRIP? MARK "N/A" IF THE QUALITY DID NOT APPLY TO YOUR TRIP.	27
Q2.2 - HOW LIKELY OR UNLIKELY ARE YOU TO VISIT THE ROGUE VALLEY AGAIN IN THE FUTURE? (N=682)	27
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=678)	28
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=673)	29
Q2.6 - HOW SATISFIED OR DISSATISFIED WERE YOU WITH THE FOLLOWING TRAITS OR FEATURES OF YOUR EXPERIENCE AT WINERIES DURING YOUR TRIP?	30
Q2.8 - TO WHAT EXTENT DO YOU AGREE OR DISAGREE WITH THE FOLLOWING STATEMENTS, BASED ON YOUR MOST RECENT TRIP TO THE ROGUE VALLEY?	30
TRIP MOTIVATION & SATISFACTION (RECENT WINE + RESIDENTS/A2)	31
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=1630)	31
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=1627)	32
Q2.6 - HOW SATISFIED OR DISSATISFIED WERE YOU WITH THE FOLLOWING TRAITS OR FEATURES OF YOUR EXPERIENCE AT WINERIES DURING YOUR TRIP?	33
Q2.8 - TO WHAT EXTENT DO YOU AGREE OR DISAGREE WITH THE FOLLOWING STATEMENTS, BASED ON YOUR MOST RECENT TRIP TO WINERIES IN THE ROGUE VALLEY?	33
TRIP MOTIVATION & SATISFACTION (PAST WINERY + REGION VISITORS/B1)	34
Q2.1 - HOW SATISFIED OR DISSATISFIED WERE YOU WITH EACH OF THESE QUALITIES OF THE ROGUE VALLEY DURING YOUR TRIP? MARK "N/A" IF THE QUALITY DID NOT APPLY TO YOUR TRIP.	34
Q2.2 - HOW LIKELY OR UNLIKELY ARE YOU TO VISIT THE ROGUE VALLEY AGAIN IN THE FUTURE? (N=239)	34
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=237)	36
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=232)	37
Q2.5 - WHICH OF THE FOLLOWING RESOURCES DO YOU TYPICALLY USE TO SELECT WINERIES AND TASTING ROOMS TO VISIT? SELECT ALL THAT APPLY. (N=237)	38
Q2.5B - WHICH SOCIAL MEDIA PLATFORM(S) DO YOU USE FOR SELECTING WINERIES? (N=27)	38
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?	39
Q2.7 - WHAT FACTORS PREVENT YOU FROM RETURNING TO OR VISITING WINERIES IN THE ROGUE VALLEY MORE FREQUENTLY? SELECT ALL THAT APPLY. (N=221)	40
Q2.8 - TO WHAT EXTENT DO YOU AGREE OR DISAGREE WITH THE FOLLOWING STATEMENTS, BASED ON YOUR MOST RECENT TRIP TO THE ROGUE VALLEY?	41
TRIP MOTIVATION & SATISFACTION (PAST WINERY VISITORS + RESIDENTS/B2)	42
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=54)	42

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=52)	43
Q2.5 - WHICH OF THE FOLLOWING RESOURCES DO YOU TYPICALLY USE TO SELECT WINERIES AND TASTING ROOMS TO VISIT? SELECT ALL THAT APPLY. (N=52)	44
Q2.5B - WHICH SOCIAL MEDIA PLATFORM(S) DO YOU USE FOR SELECTING WINERIES? (N=8)	44
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?	45
Q2.7 - WHAT FACTORS PREVENT YOU FROM RETURNING TO OR VISITING WINERIES IN THE ROGUE VALLEY MORE FREQUENTLY? (N=46)	46
Q2.8 - TO WHAT EXTENT DO YOU AGREE OR DISAGREE WITH THE FOLLOWING STATEMENTS, BASED ON YOUR MOST RECENT TRIP TO WINERIES IN THE ROGUE VALLEY?	47
BARRIERS TO VISITING (NON-WINERY + REGION VISITOR/C1)	48
QC1.1.1 - DO YOU ENJOY VISITING WINERIES AND TASTING ROOMS? (N=47)	48
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=46)	48
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=41)	49
QC1.1.4 - WHAT FACTORS HAVE PREVENTED YOU FROM VISITING A WINERY ON YOUR LATEST TRIP TO THE ROGUE VALLEY? SELECT ALL THAT APPLY. (N=46)	50
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=45)	51
QC1.1.5B - WHICH SOCIAL MEDIA PLATFORM? (N=13)	51
DEMOGRAPHICS	52
Q4.1 - WHERE DO YOU CURRENTLY LIVE? (N=2647)	52
Q4.2 - WHAT IS YOUR GENDER? (N=2653)	52
Q4.3 - WHICH BEST DESCRIBES YOUR AGE? (N=2657)	52
Q4.4 - WHICH BEST DESCRIBES THE COMBINED ANNUAL INCOME OF ALL MEMBERS OF YOUR HOUSEHOLD?	53
Q4.5 - WHICH BEST DESCRIBES YOUR RACE OR ETHNIC BACKGROUND? SELECT ALL THAT APPLY. (N=2652)	55
TRIP MOTIVATION & SATISFACTION (NON-WINERY + REGION VISITOR/C1)	56
Q2.1 - HOW SATISFIED OR DISSATISFIED WERE YOU WITH EACH OF THESE QUALITIES OF THE ROGUE VALLEY DURING YOUR TRIP? MARK "N/A" IF THE QUALITY DID NOT APPLY TO YOUR TRIP.	56
Q2.2 - HOW LIKELY OR UNLIKELY ARE YOU TO VISIT THE ROGUE VALLEY AGAIN IN THE FUTURE? (N=45)	56
QC2.1.1 - DO YOU ENJOY VISITING WINERIES AND TASTING ROOMS? (N=5)	57
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=4)	58
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=4)	59
QC2.1.4 - WHAT FACTORS HAVE PREVENTED YOU FROM VISITING A WINERY IN THE ROGUE VALLEY? SELECT ALL THAT APPLY. (N=4)	60
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=4)	61
QC2.1.5B - WHICH SOCIAL MEDIA PLATFORM? (N=2)	61
BARRIERS TO VISITING (NON-VISITORS/D)	62
QD1.1 - DO YOU ENJOY VISITING WINERIES AND TASTING ROOMS? (N=96)	62
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=93)	63

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=91)	64
QD1.4 - WHAT FACTORS HAVE PREVENTED YOU FROM VISITING THE ROGUE VALLEY? SELECT ALL THAT APPLY. (N=90)	65
QD1.5 - WHICH OF THE FOLLOWING RESOURCES DO YOU TYPICALLY USE TO SELECT WINERIES AND TASTING ROOMS TO VISIT? SELECT ALL THAT APPLY. (N=92)	65
QD1.5B - WHICH SOCIAL MEDIA PLATFORM? (N=18)	66
QD1.6 - HOW IMPORTANT OR UNIMPORTANT ARE THE FOLLOWING FACTORS IN YOUR DECISIONS ABOUT PLACES TO VISIT/TRIPS TO TAKE?	67
OTHER WINE REGIONS	68
Q3.1 - IN GENERAL, HOW WOULD YOU RATE THE QUALITY OF THE WINE FROM THE FOLLOWING REGIONS?	68
Q3.2 - IN GENERAL, HOW WOULD YOU RATE THE FOLLOWING REGIONS AS A LEISURE TRAVEL/VACATION/GETAWAY DESTINATION FOR WINE TASTING?	68
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.	69
Q3.4 - HOW STRONGLY DO YOU ASSOCIATE EACH OF THE FOLLOWING VARIETIES WITH THE ROGUE VALLEY?	69
Q3.6 - HOW FREQUENTLY DO YOU DRINK WINES FROM THE FOLLOWING WINE-GROWING AREAS? PLEASE CHOOSE THE FREQUENCY THAT MOST CLOSELY DESCRIBES YOU.	70

Survey Logic

Initial Survey Flow



7 Potential
Survey
Respondent
Categories

- A1. Non-Resident: Visited in past year
- A2. Resident: Visited in past year
- B1. Non-Resident: Visited more than 1yr ago
- B2. Resident: Visited more than 1yr ago
- C1. Non-Resident: Not Visited a Winery
- C2. Resident: Not Visited a Winery
- D1. Non-Resident: Not Visited Region

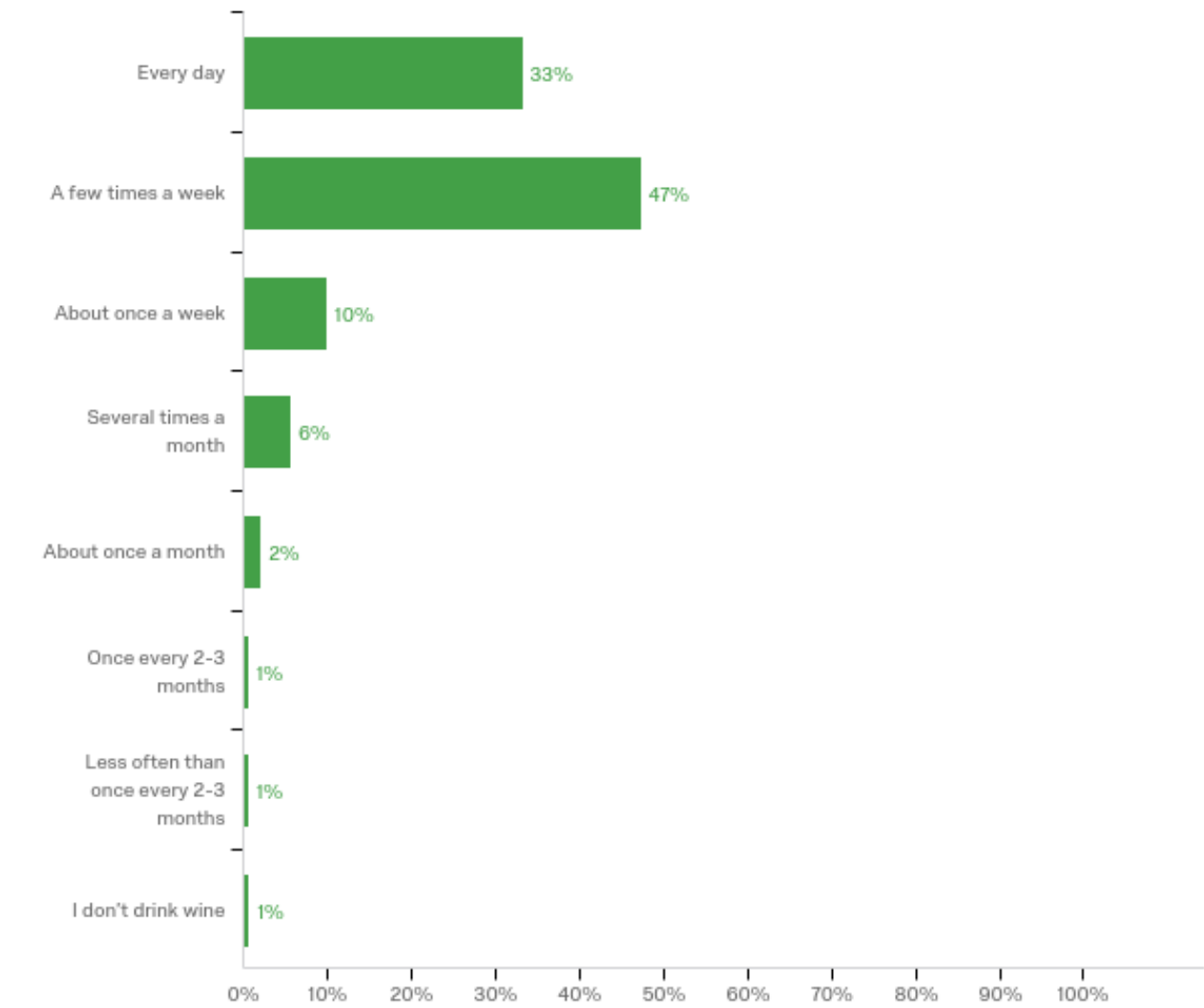
Survey Respondent Groups

		Non-Residents	Residents
Winery Visitors	Recent Visitors	A1. Non-Resident: Visited in past year <ul style="list-style-type: none"> • 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 <ul style="list-style-type: none"> • Part 1: About your trip • Part 2: Trip motivation & satisfaction <ul style="list-style-type: none"> • Q13, Q16 – Q22 • Part 3: Perceptions of Wine Regions • Part 4: About you
	Past Visitors	B1. Non-Resident: Visited more than 1yr ago <ul style="list-style-type: none"> • Part 1: Trip motivation & satisfaction <ul style="list-style-type: none"> • All Qs (slightly modified) • Part 2: Perceptions of Wine Regions • Part 3: About you 	B2. Resident: Visited more than 1yr ago <ul style="list-style-type: none"> • Part 1: Trip motivation & satisfaction <ul style="list-style-type: none"> • 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 <ul style="list-style-type: none"> • Part 1 (Non-winery visitors): Barriers to Visiting • Part 2: Trip motivation & satisfaction <ul style="list-style-type: none"> • Q13 – Q15, Q18, Q19, Q21, Q22 • Part 3: Perceptions of Wine Regions • Part 4: About you 	C2. Resident: Not Visited a Winery <ul style="list-style-type: none"> • 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 <ul style="list-style-type: none"> • Part 1 (Non-visitors): Barriers to Visiting • Part 2: Perceptions of Wine Regions • Part 3: About you 	

Rogue Valley Survey Responses

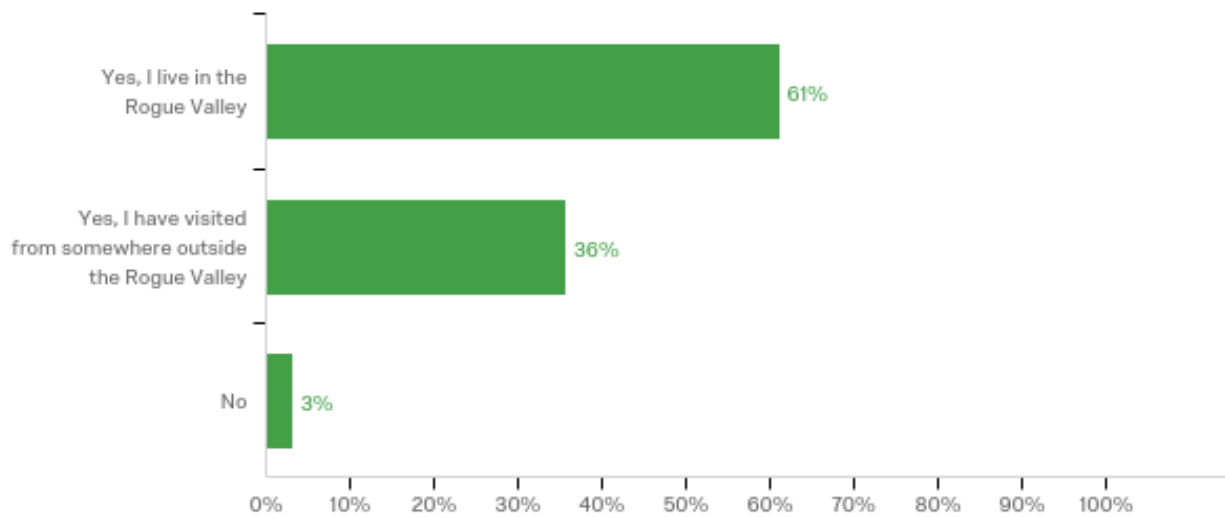
Screeners Questions

SQ1 - On average, how often do you drink wine? (n= 3303)



Answer	Count
Every day	1097
A few times a week	1564
About once a week	327
Several times a month	187
About once a month	69
Once every 2-3 months	18
Less often than once every 2-3 months	18
I don't drink wine	23
Total	3303

SQ2 - Have you ever spent time in the Rogue Valley? Please refer to the map below to see the Rogue Valley boundaries. (n=3233)

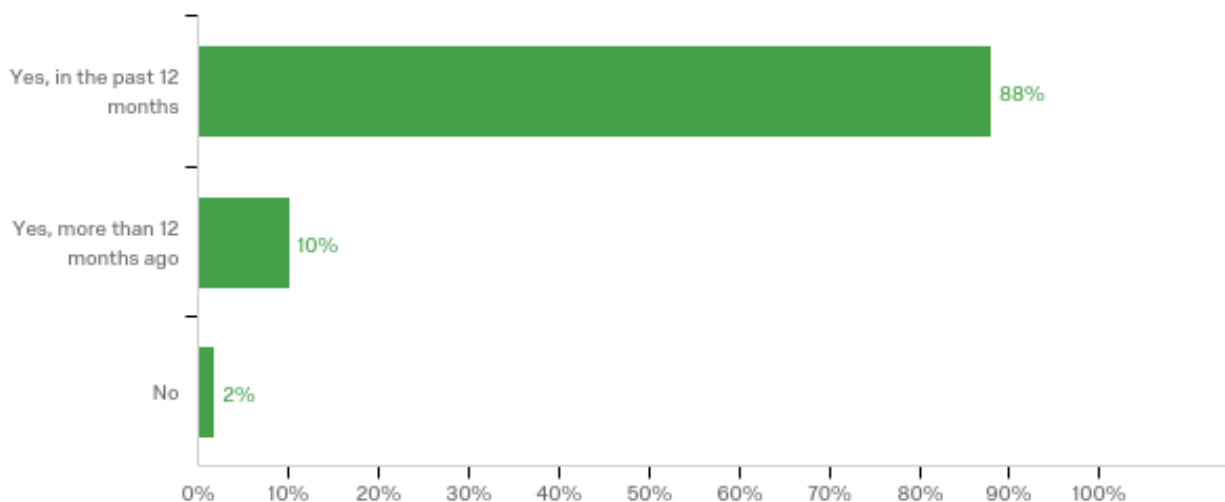


Answer	Count
Yes, I live in the Rogue Valley	1976
Yes, I have visited from somewhere outside the Rogue Valley	1155
No	102
Total	3233

SQ2B - How long ago was your most recent visit? (n=1153)

Answer	%	Count
Within the past 3 years	89%	1030
More than 3 years ago	11%	123
Total	100%	1153

SQ3 - Have you ever visited a winery tasting room for the purpose of tasting or buying wines in the Rogue Valley? (n=3000)



Answer	Count
Yes, in the past 12 months	2643
Yes, more than 12 months ago	302
No	55
Total	3000

SQ4 - During which month(s) did you visit a winery or wineries in the Rogue Valley? Check all that apply. (n=2560)

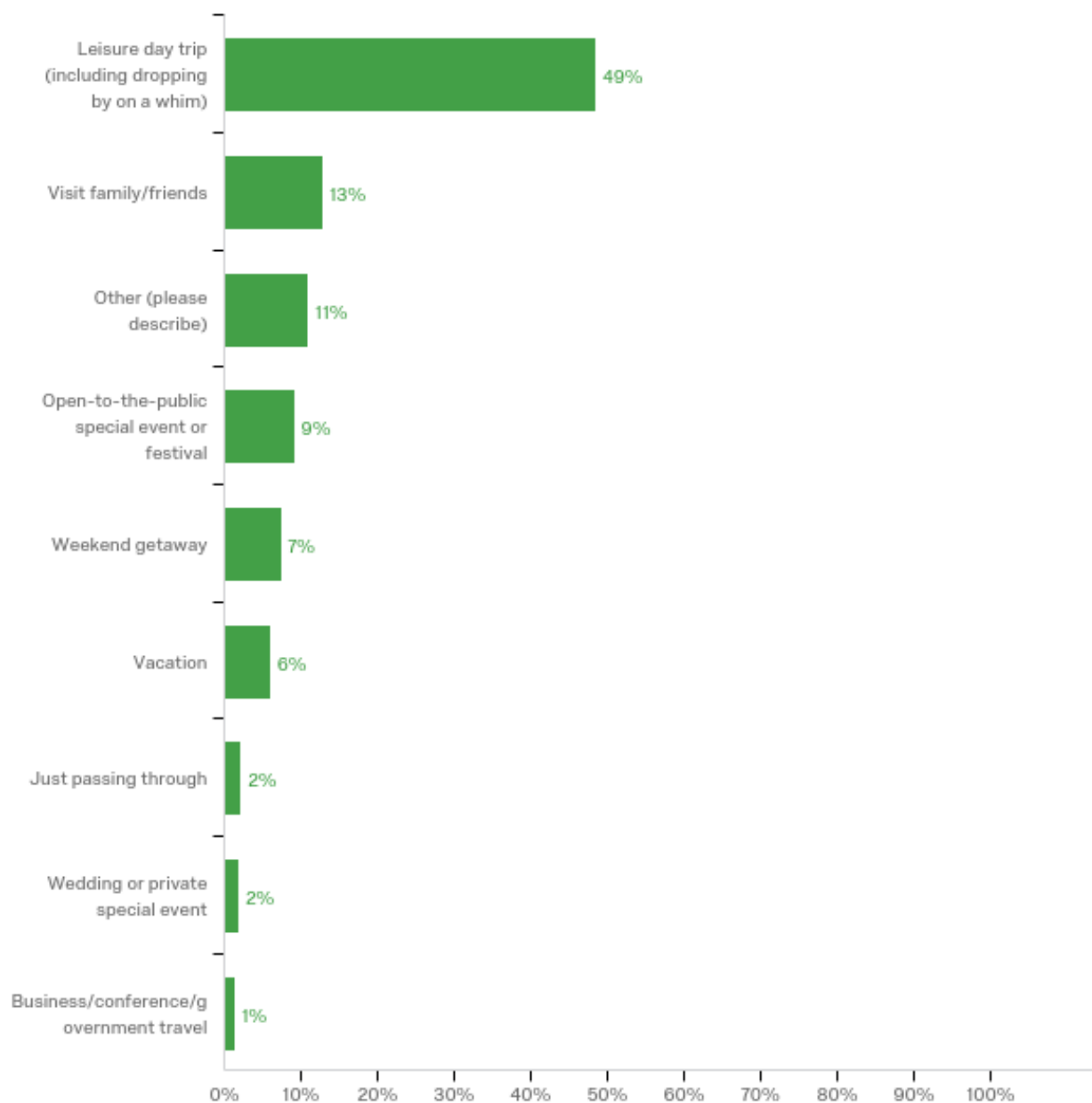
Answer	%	Count
January	30%	765
February	35%	895
March	43%	1109
April	49%	1253
May	57%	1452
June	60%	1543
July	57%	1471
August	63%	1616
September	58%	1476
October	49%	1265
November	0%	32
December	36%	921

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	29%	676	29%	672	21%	487	13%	311	8%	181	2327
\$14 - \$19.99	13%	331	37%	914	36%	892	11%	268	2%	53	2458
\$20 - \$29.99	5%	145	27%	724	50%	1327	15%	413	2%	63	2672
\$30 - \$49.99	1%	32	12%	300	39%	972	35%	872	13%	323	2499
\$50 or more	0%	10	4%	91	16%	368	36%	806	43%	971	2246

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

Q1.1 - Which of the following best describes your trip? (n=2560)



Answer	Count
Leisure day trip (including dropping by on a whim)	1243
Visit family/friends	328
Other (please describe)	280
Open-to-the-public special event or festival	233
Weekend getaway	189
Vacation	152
Just passing through	55
Wedding or private special event	47
Business/conference/government travel	33
Total	2560

Q1.1b - Did you travel more than 50 miles from your home to visit a winery on this trip? (n=2199)

Answer	%	Count
No	78%	1717
Yes	22%	482
Total	100%	2199

Q1.1c - Was the primary purpose of your trip to visit a winery or wineries? (n=1895)

Answer	%	Count
Yes	77%	1452
No	23%	443
Total	100%	1895

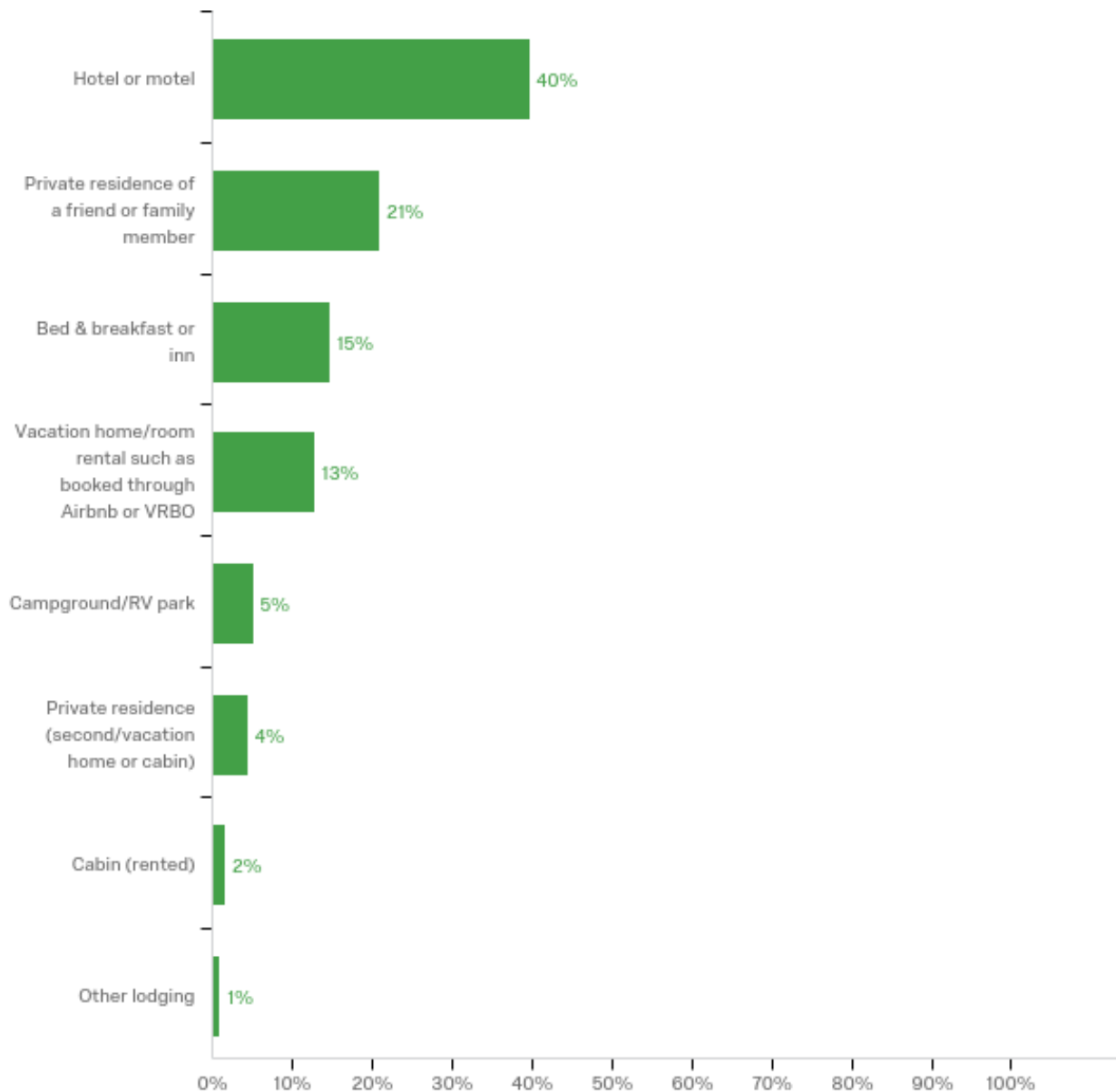
Q1.2 - On this trip, did you stay overnight in the Rogue Valley anywhere outside your home? (n=2552)

Answer	%	Count
No	75%	1904
Yes	25%	648
Total	100%	2552

Q1.2b - How many nights away from home did you stay in the Rogue Valley? (n=516)

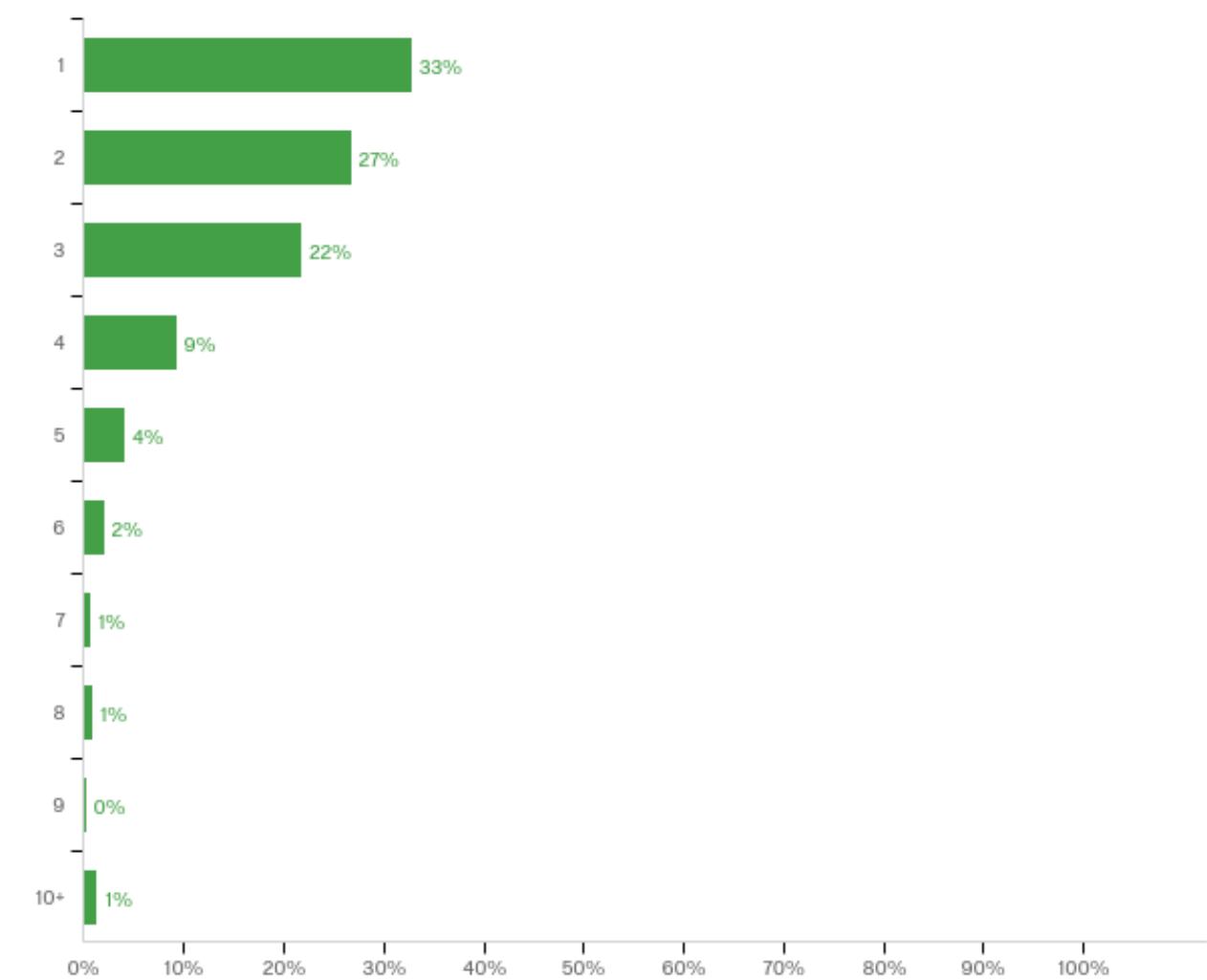
Field	Minimum	Maximum	Mean	Std Deviation	Variance	Count
How many nights away from home did you stay in the Rogue Valley?	1	365	6	28	797	516

Q1.2c - Where did you stay overnight while in the Rogue Valley? (n=635)



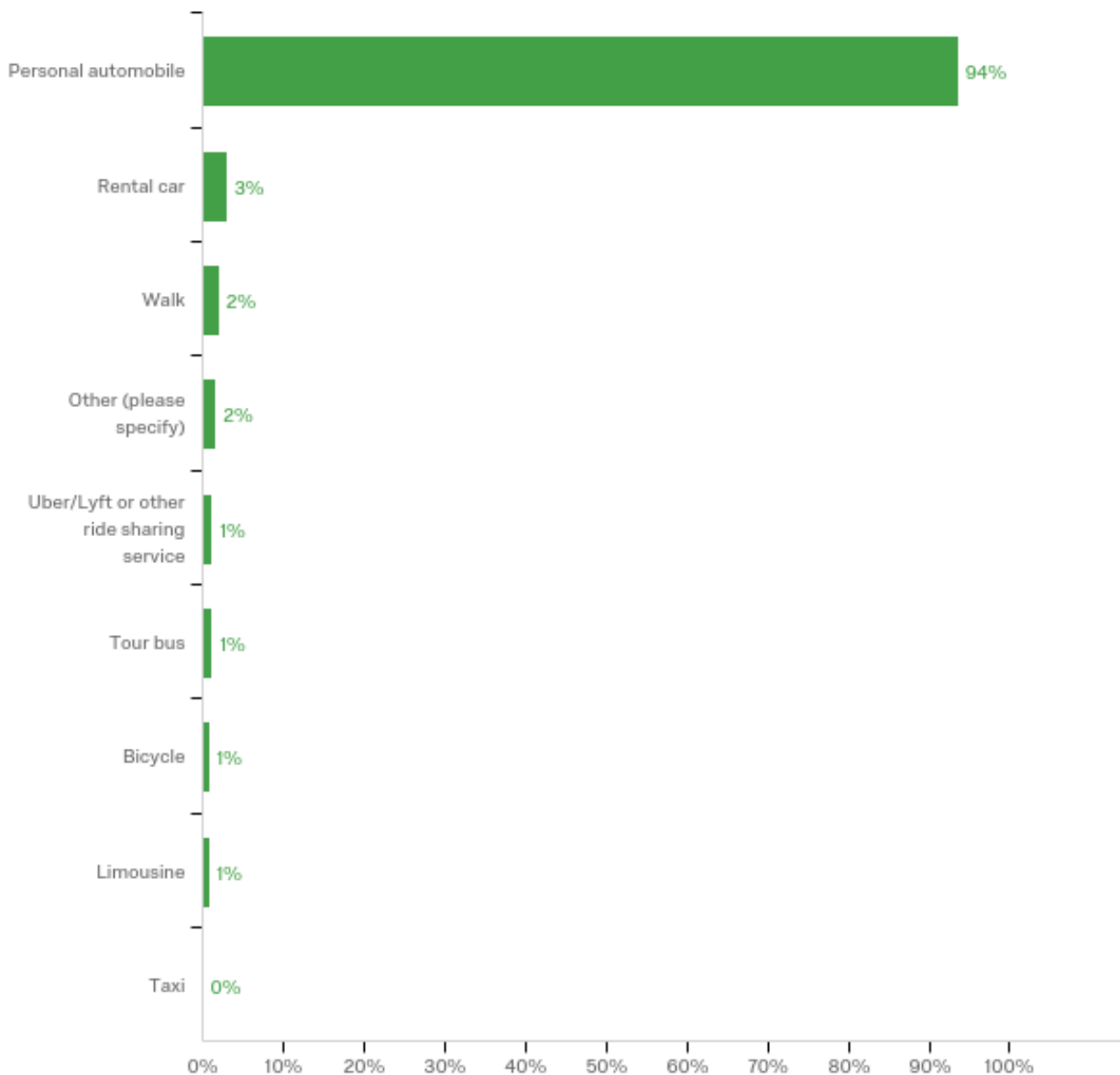
Answer	Count
Vacation home/room rental such as booked through Airbnb or VRBO	81
Private residence (second/vacation home or cabin)	28
Private residence of a friend or family member	133
Other lodging	6
Hotel or motel	252
Campground/RV park	32
Cabin (rented)	10
Bed & breakfast or inn	93
Total	635

Q1.4 - How many wineries did you visit to taste or buy wine at as part of your trip? (n=2219)



Answer	Count
1	728
2	594
3	484
4	206
5	92
6	45
7	15
8	19
9	5
10+	31
Total	2219

Q1.5 - Which modes of transportation did you use during your trip to get to wineries? Select all that apply.
(n=2509)



Answer	Count
Personal automobile	2350
Rental car	75
Uber/Lyft or other ride sharing service	29
Taxi	1
Bicycle	18
Walk	50
Limousine	18
Tour bus	29
Other (please specify)	41
Total	2611

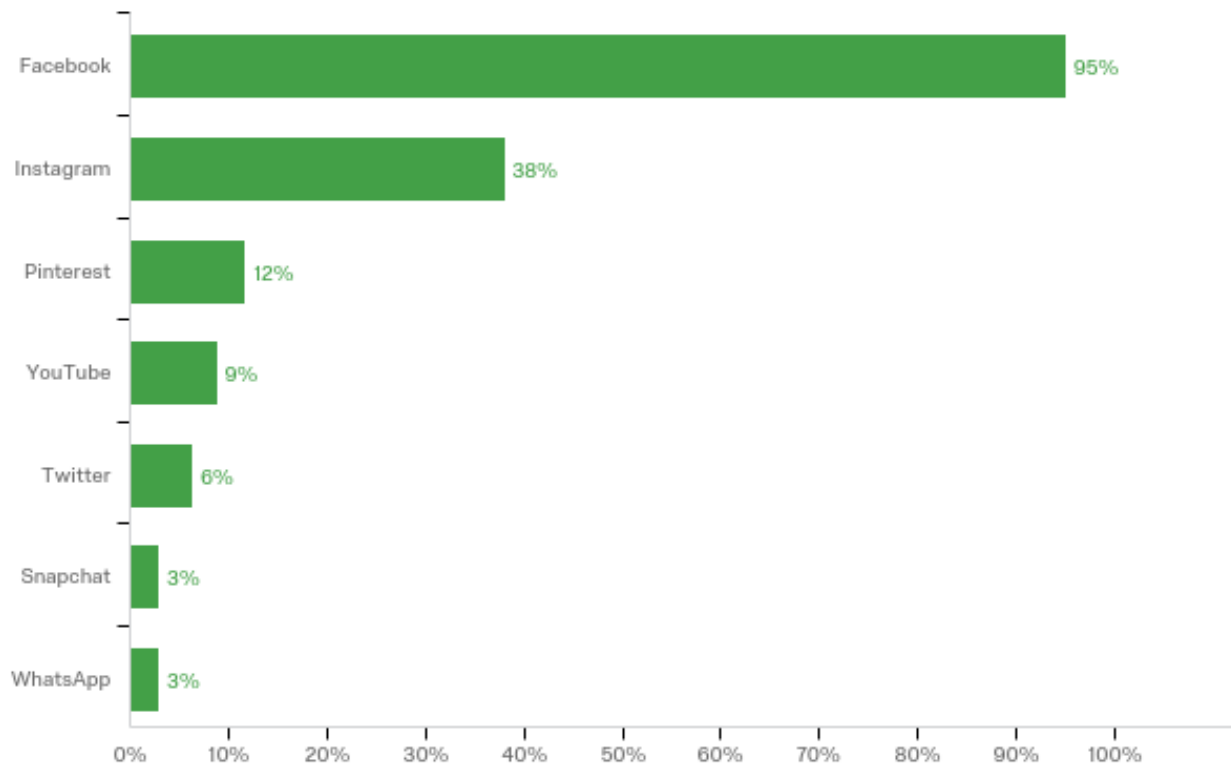
Q1.6 - Which of the following resources did you use to select the wineries and tasting rooms you visited as part of your trip? Select all that apply. (n=2462)

Answer	%	Count
Word of mouth (recommendation from friend/family, local resident, etc.)	53%	1317
Other (please specify)	23%	566
Website(s) of an individual winery or wineries	18%	437
Wine publication, online or in print (e.g. Wine Spectator, Wine & Spirits)	14%	352
Applegate Valley Wine Trail website	12%	306
Free travel guidebook/brochure/map	9%	232
Social Media (e.g. Facebook, Instagram, etc.)	8%	204
Road signs or billboards	8%	202
Southern Oregon Winery Association website	8%	191
Recommendation from a local restaurant	6%	147
Rogue Valley Vintners website	6%	145
Mapping website (e.g. Google Maps)	5%	132
Magazine/newspaper (not wine-specific)	5%	129
Restaurant, wine store, or retailer referral	5%	125
Reviews website (e.g. Yelp, TripAdvisor)	4%	106
Bear Creek Wine Trail	4%	88
Upper Rogue Wine Trail website	3%	74
Visitors/welcome center	2%	49
Other travel-related website	1%	36
Concierge or other hotel/B&B staff	1%	30
Commercial travel guidebook (e.g. Lonely Planet)	1%	21
Online travel agency (e.g. Expedia, Priceline)	0%	2
Traditional travel agency	0%	1

Q1.6a - How did you get your free travel guidebook/brochure/map? (n=218)

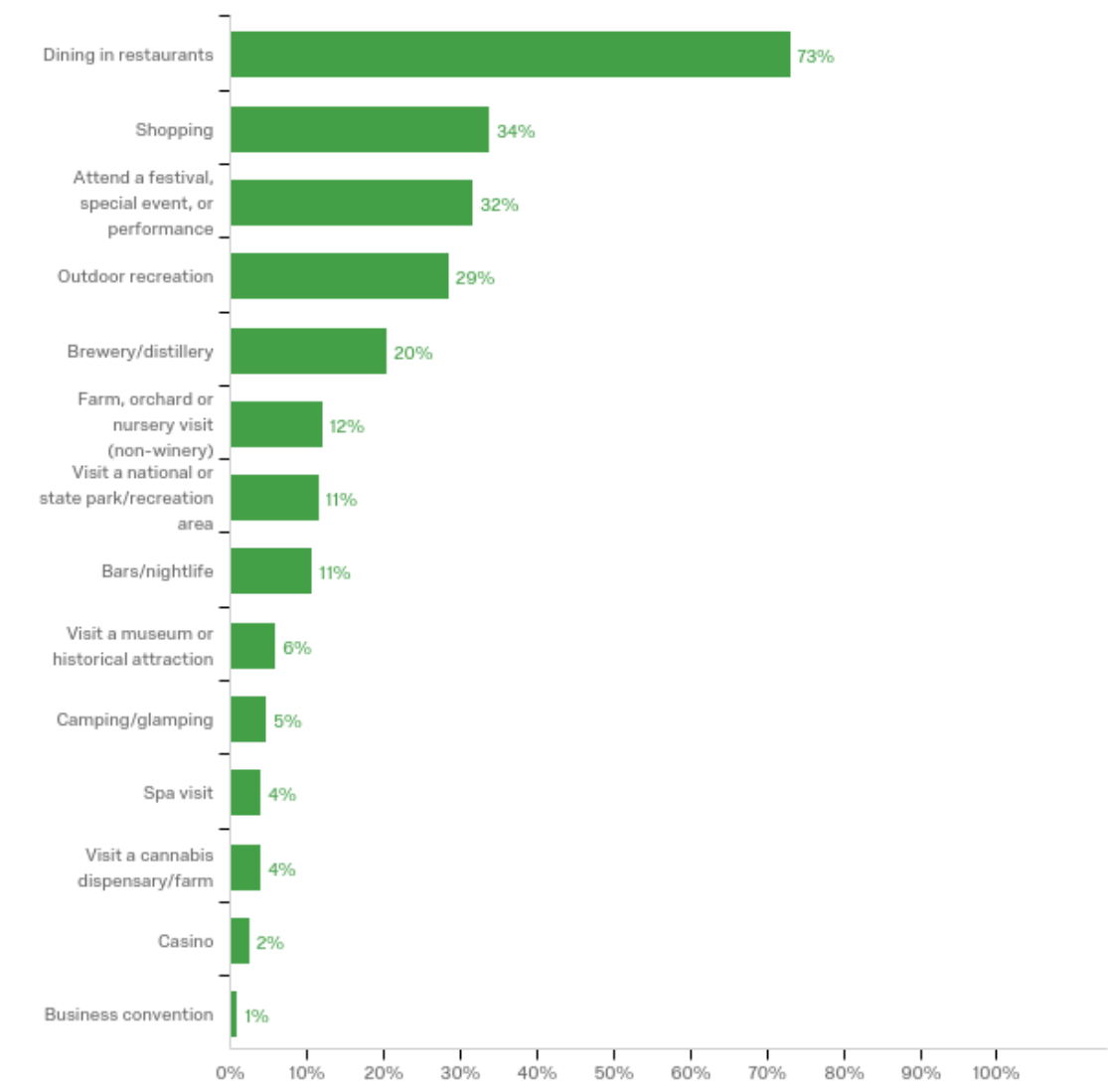
Answer	%	Count
Picked up locally during trip	89%	193
Ordered prior to trip	11%	25
Total	100%	218

Q1.6b - Which social media platform did you use? (n=205)



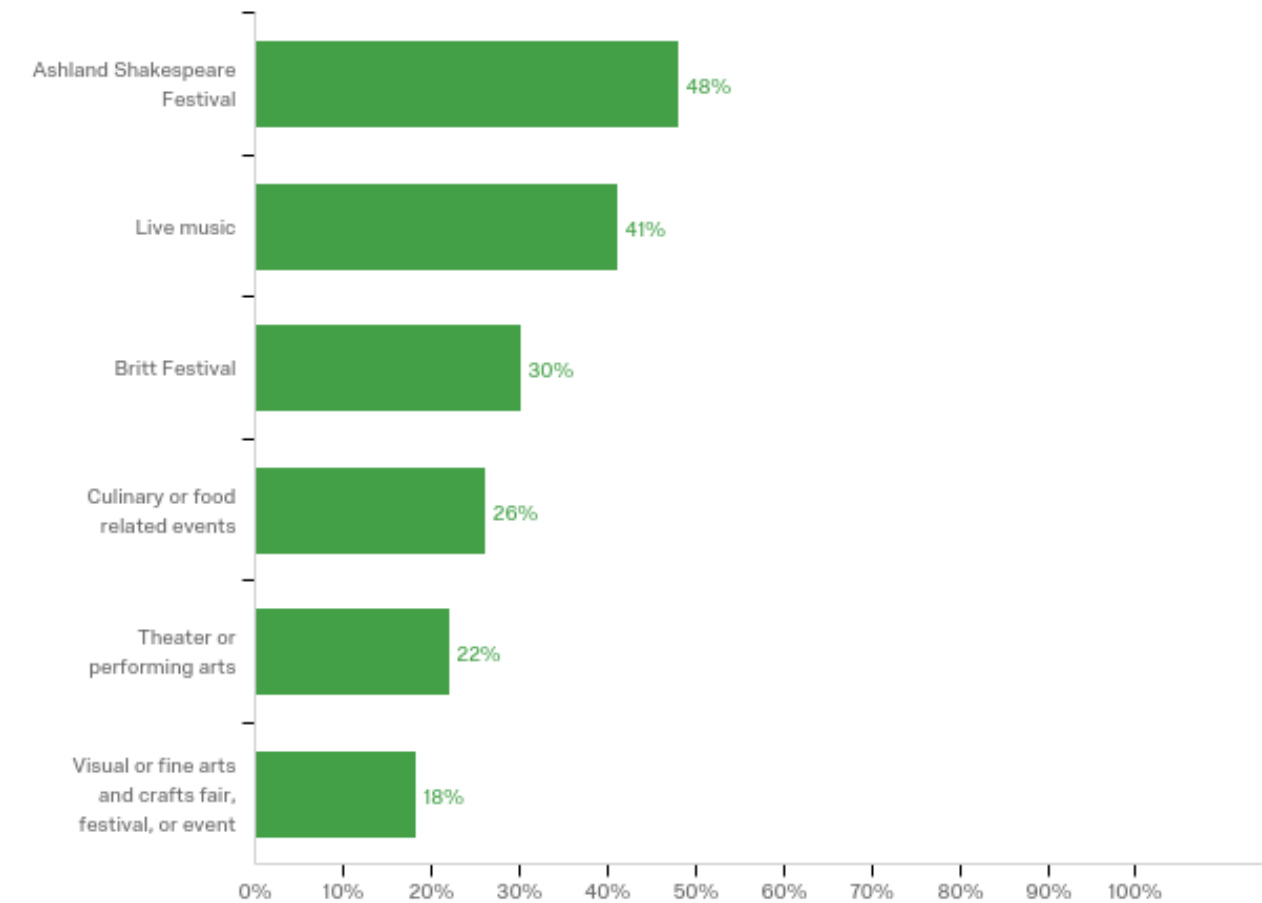
Answer	Count
Facebook	195
Instagram	78
Pinterest	24
YouTube	18
Twitter	13
Snapchat	6
WhatsApp	6

Q1.7 - What other activities did you participate in while in the Rogue Valley as part of your trip? Select all that apply. (n=1950)



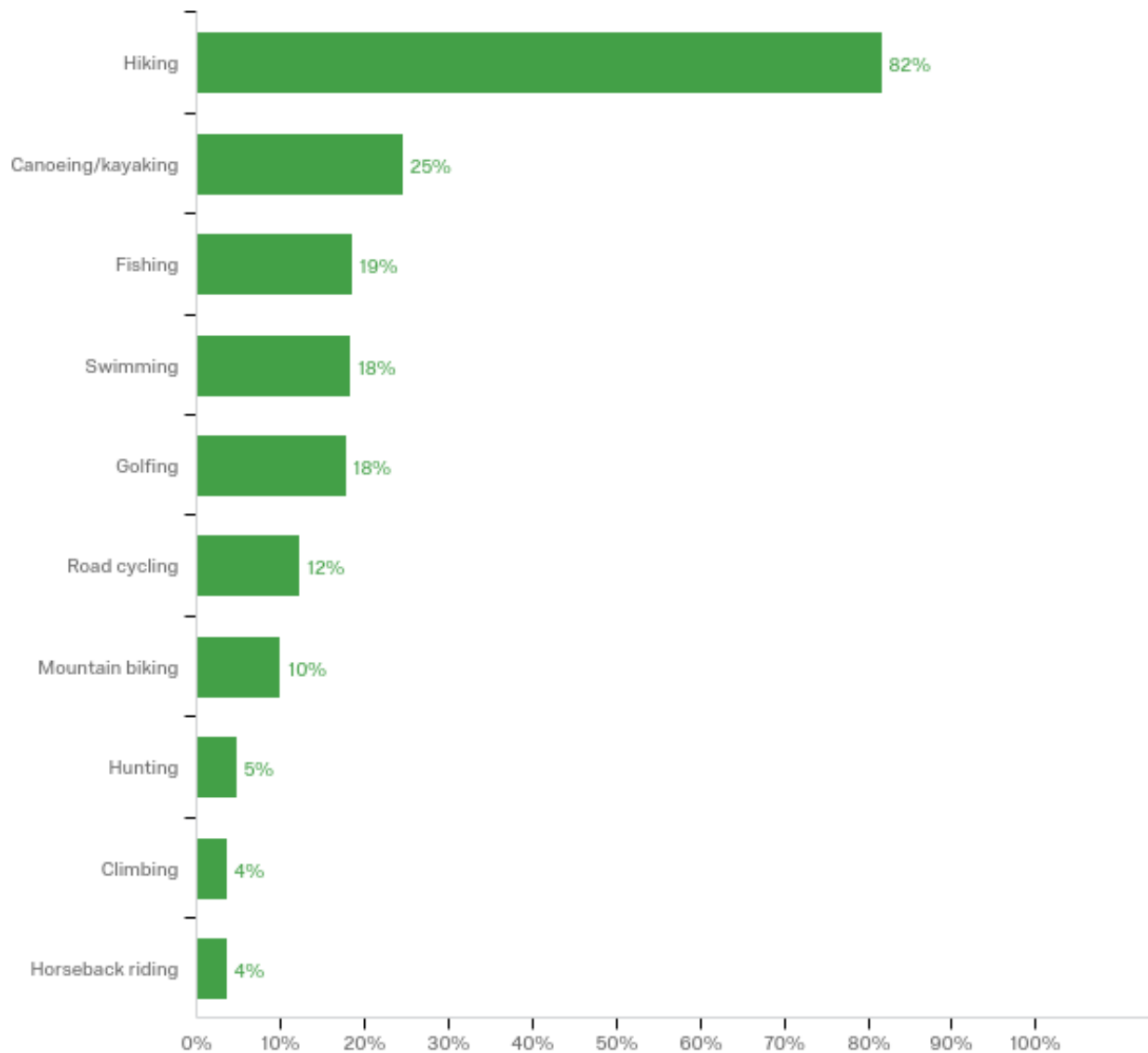
Answer	Count
Dining in restaurants	1426
Shopping	660
Attend a festival, special event, or performance	618
Outdoor recreation	556
Brewery/distillery	398
Farm, orchard or nursery visit (non-winery)	234
Visit a national or state park/recreation area	224
Bars/nightlife	208
Visit a museum or historical attraction	116
Camping/glamping	93
Spa visit	79
Visit a cannabis dispensary/farm	78
Casino	48
Business convention	18

Q1.7a - What type of festival, special event, or performance did you attend? Select all that apply. (n=605)



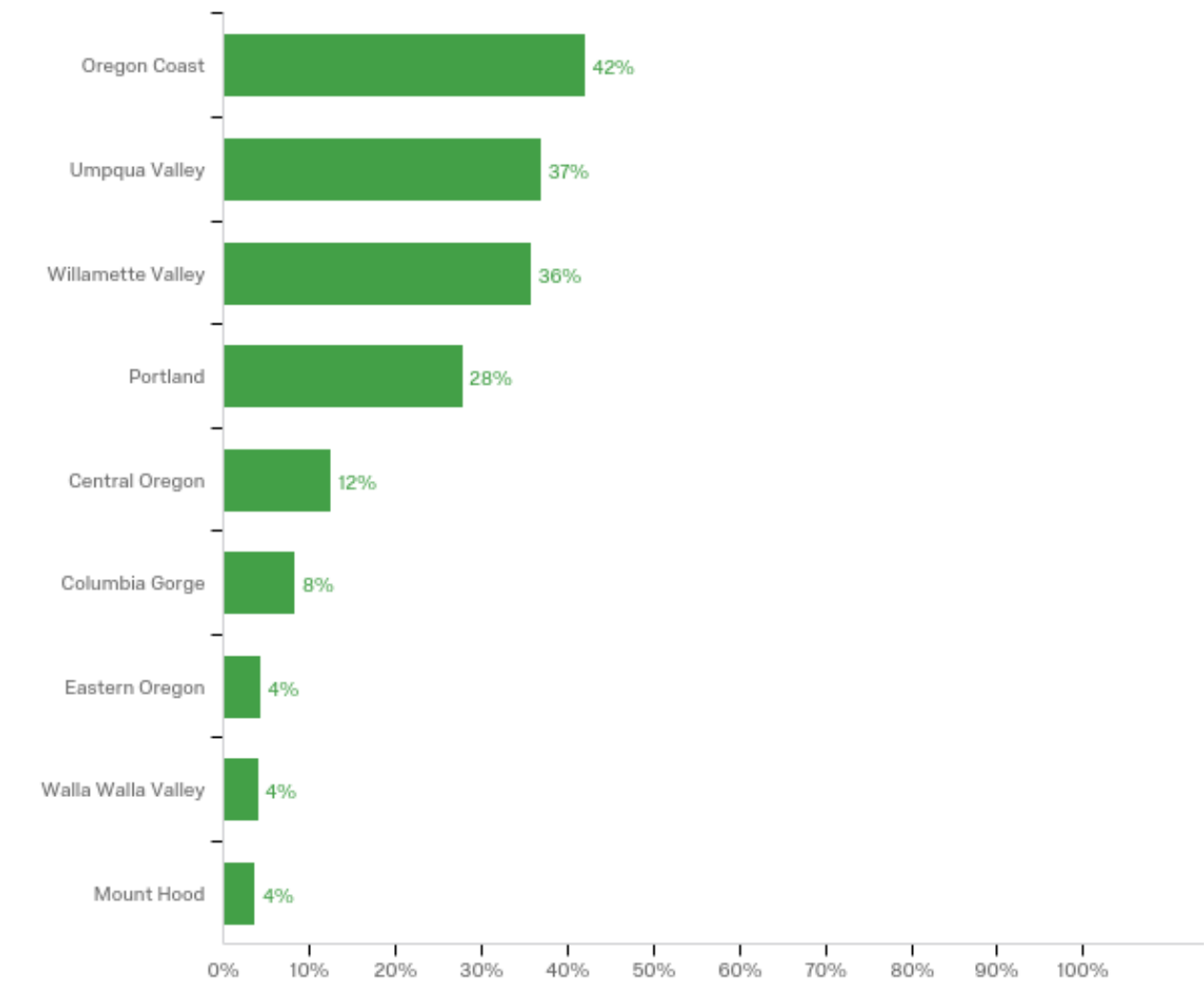
Answer	Count
Ashland Shakespeare Festival	291
Live music	249
Britt Festival	182
Culinary or food related events	158
Theater or performing arts	133
Visual or fine arts and crafts fair, festival, or event	110

Q1.7b - What type of outdoor recreation did you do? Select all that apply. (n=529)

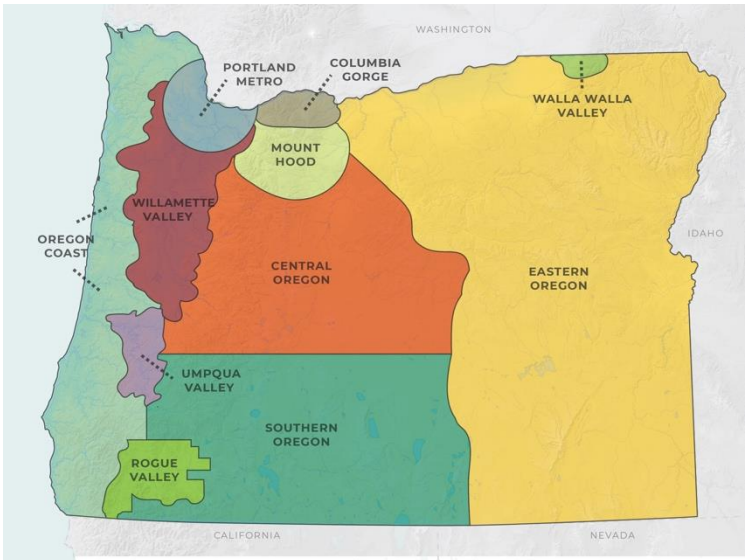


Answer	Count
Hiking	432
Canoeing/kayaking	130
Fishing	98
Swimming	97
Golfing	94
Road cycling	65
Mountain biking	53
Hunting	25
Climbing	19
Horseback riding	19

Q1.8 - Which other Oregon destinations outside of the Rogue 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=699)



Answer	Count
Oregon Coast	294
Umpqua Valley	258
Willamette Valley	250
Portland	194
Central Oregon	87
Columbia Gorge	58
Eastern Oregon	30
Walla Walla Valley	28
Mount Hood	26



Q1.9 - Please tell us approximately how much your party spent in the Rogue Valley per day on the following items during this trip.

Field	Minimum	Maximum	Mean	Std Deviation	Variance	Count
Lodging	0	20000	57	435	189328	2404
Restaurants & dining out	0	5000	94	203	41341	2403
Retail purchases (excluding wine)	0	3400	39	145	21040	2401
Gas, parking, & local transportation	0	50500	46	1034	1068956	2407
Sightseeing & recreation (excluding wine tasting)	0	3000	13	85	7270	2407
Other (please specify)	0	1500	9	66	4353	2396

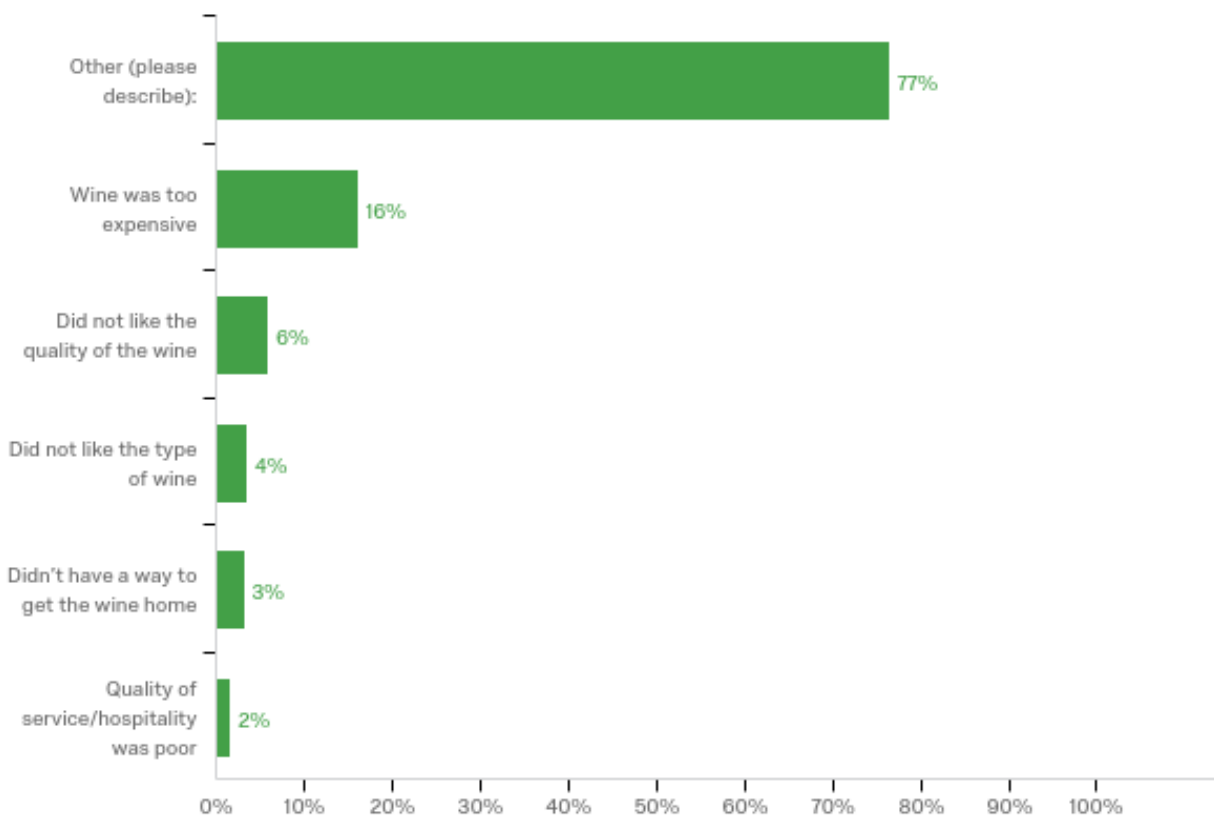
Q1.10 - Please tell us approximately how much your party spent at winery tasting rooms exclusively in the Rogue Valley per day during this trip.

Field	Minimum	Maximum	Mean	Std Deviation	Variance	Count
Tasting Fees	0	800	17	42	1725	2393
Wine purchased	0	15010	141	383	146779	2405

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

Field	Minimum	Maximum	Mean	Std Deviation	Variance	Count
Bottles	0	360	7	13	177	2408

Q1.11b - What were your reasons for not purchasing bottles of wine on your trip? Select all that apply.(n=256)

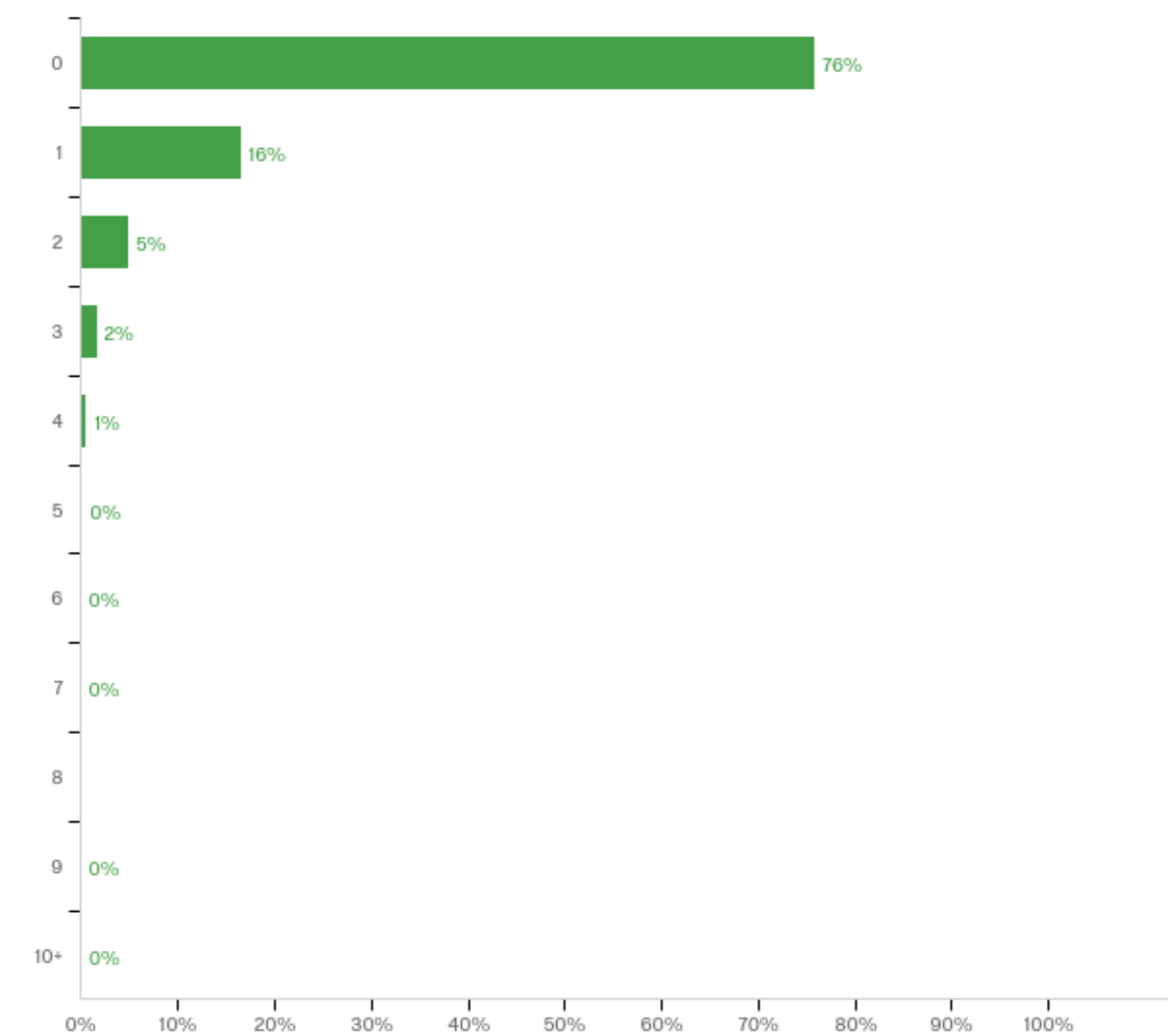


Answer	Count
Other (please describe):	196
Wine was too expensive	41
Did not like the quality of the wine	15
Did not like the type of wine	9
Didn't have a way to get the wine home	8
Quality of service/hospitality was poor	4

Q1.12 - Prior to your visit, were you a member of any wine clubs of wineries in the Rogue Valley? (n=2359)

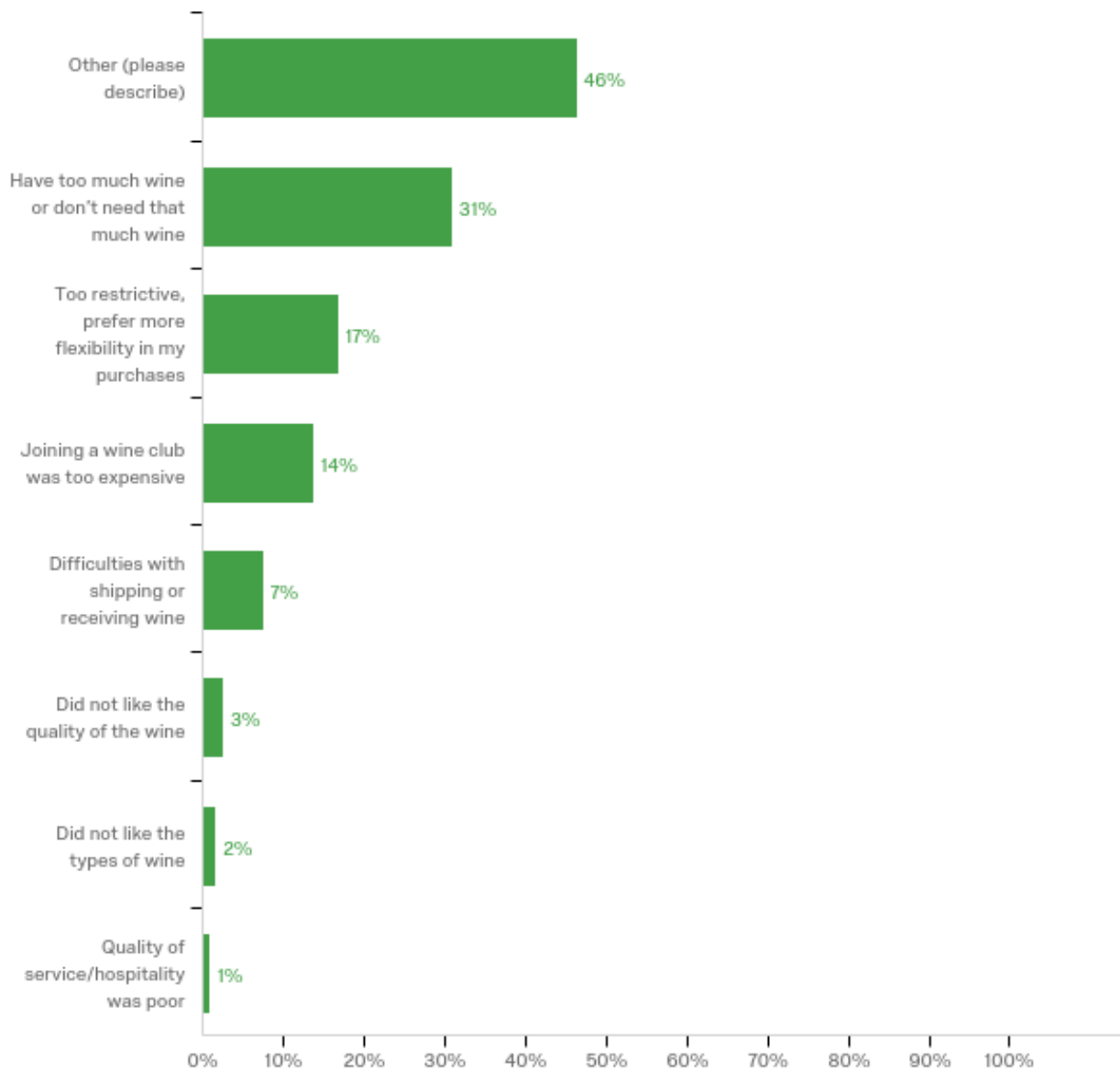
Answer	%	Count
Yes	70%	1644
No	30%	715
Total	100%	2359

Q1.13 - How many wine clubs did you sign up for during your trip? (n=2097)



Answer	Count
0	1592
1	346
2	104
3	34
4	12
5	4
6	1
7	1
8	0
9	1
10+	2
Total	2097

Q1.13b - What were your reasons for not signing up for a wine club on your trip? Select all that apply.
(n=1547)



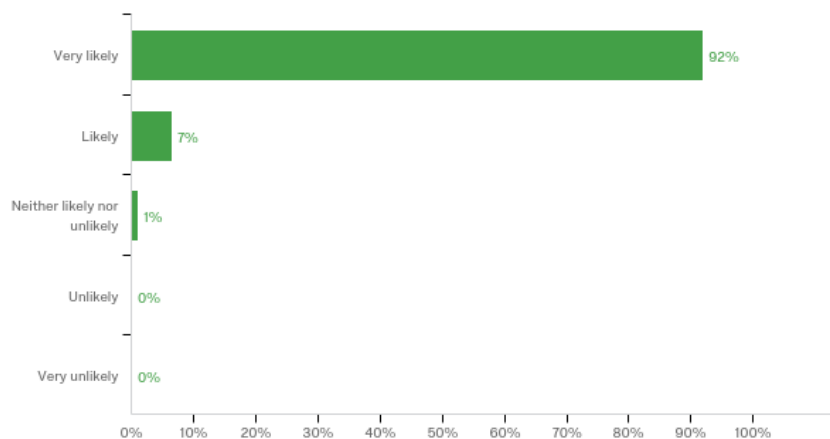
Answer	Count
Other (please describe)	717
Have too much wine or don't need that much wine	478
Too restrictive, prefer more flexibility in my purchases	259
Joining a wine club was too expensive	212
Difficulties with shipping or receiving wine	116
Did not like the quality of the wine	39
Did not like the types of wine	25
Quality of service/hospitality was poor	13

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

Q2.1 - How satisfied or dissatisfied were you with each of these qualities of the Rogue 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%	14	9%	63	89%	599	676
Affordability	1%	4	14%	92	86%	576	672
Quality of accommodations	2%	10	7%	40	91%	497	547
Ease of finding accommodations	3%	14	10%	51	88%	468	533
Opportunity to view/ experience local arts, culture, and history	1%	4	13%	74	87%	503	581
Opportunity to experience farms or farm products (including wine)	0%	1	14%	80	86%	492	573
High quality local cuisine/restaurants	2%	10	15%	95	84%	533	638
Area offers a wide variety of activities for my entire family	1%	5	19%	97	80%	419	521
Terrain/ geography/ climate is conducive to outdoor recreation activity	3%	18	10%	62	87%	523	603
Retail shopping	3%	17	30%	166	67%	373	556
Scenic beauty	1%	6	3%	19	96%	642	667

Q2.2 - How likely or unlikely are you to visit the Rogue Valley again in the future?(n=682)

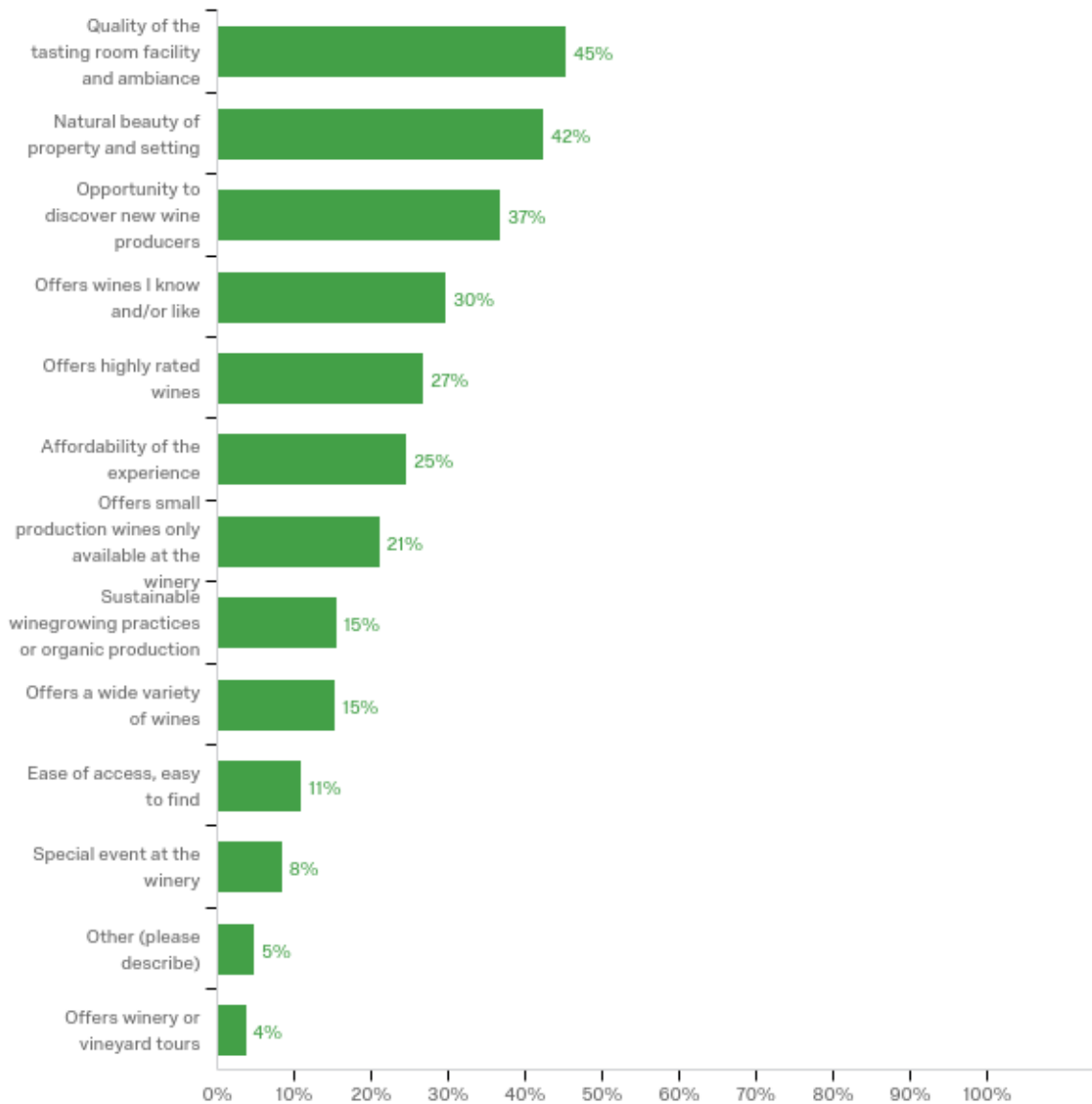


Answer	Count
Very likely	628
Likely	45
Neither likely nor unlikely	7
Unlikely	1
Very unlikely	1

Total

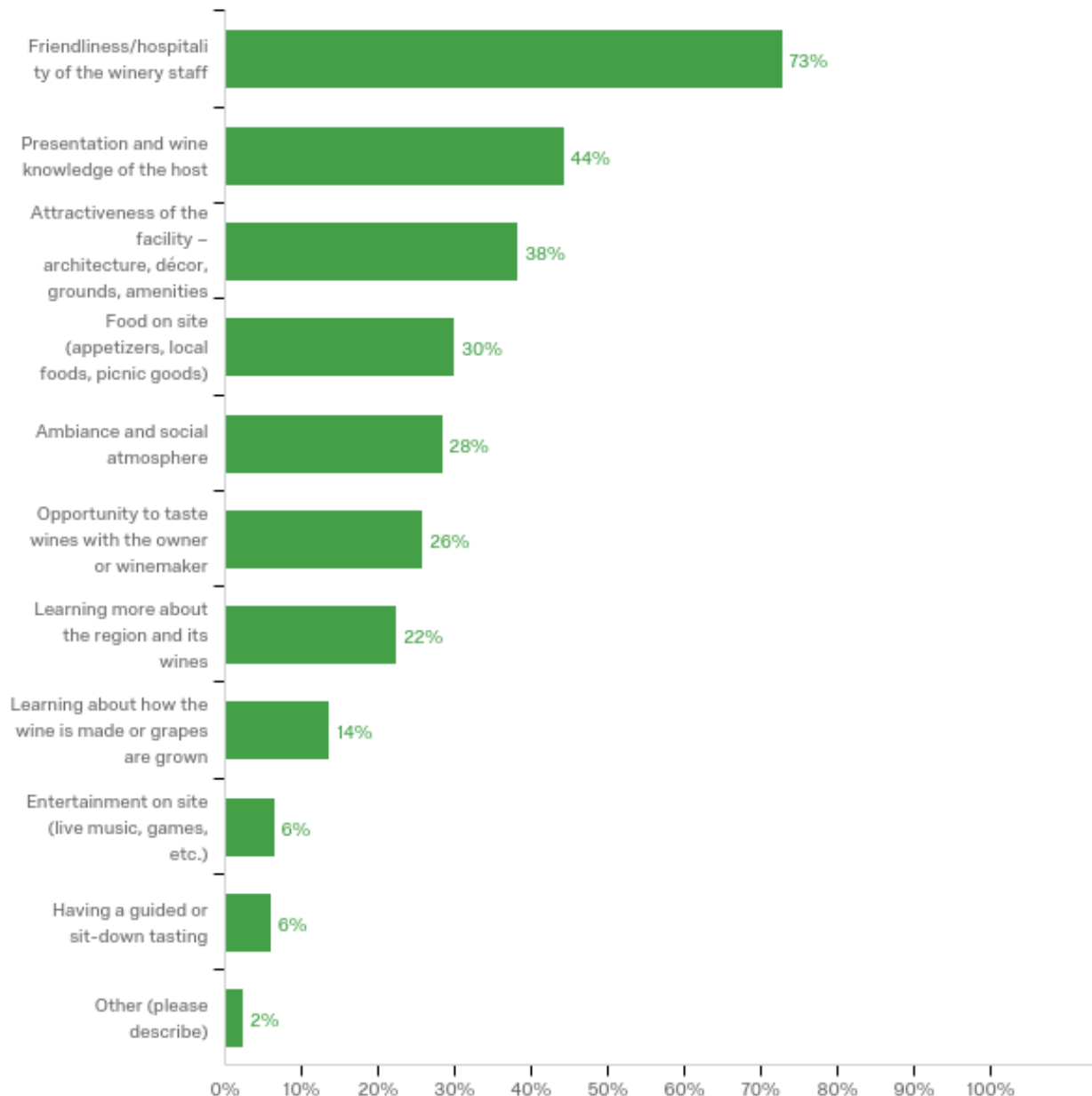
682

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=678)



Answer	Count
Quality of the tasting room facility and ambiance	308
Natural beauty of property and setting	288
Opportunity to discover new wine producers	250
Offers wines I know and/or like	202
Offers highly rated wines	182
Affordability of the experience	167
Offers small production wines only available at the winery	143
Sustainable winegrowing practices or organic production	105
Offers a wide variety of wines	104
Ease of access, easy to find	74
Special event at the winery	57
Other (please describe)	33

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=673)



Answer	Count
Friendliness/hospitality of the winery staff	491
Presentation and wine knowledge of the host	298
Attractiveness of the facility – architecture, décor, grounds, amenities	258
Food on site (appetizers, local foods, picnic goods)	202
Ambiance and social atmosphere	191
Opportunity to taste wines with the owner or winemaker	174
Learning more about the region and its wines	151
Learning about how the wine is made or grapes are grown	92
Entertainment on site (live music, games, etc.)	43

Having a guided or sit-down tasting	40
Other (please describe)	16

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

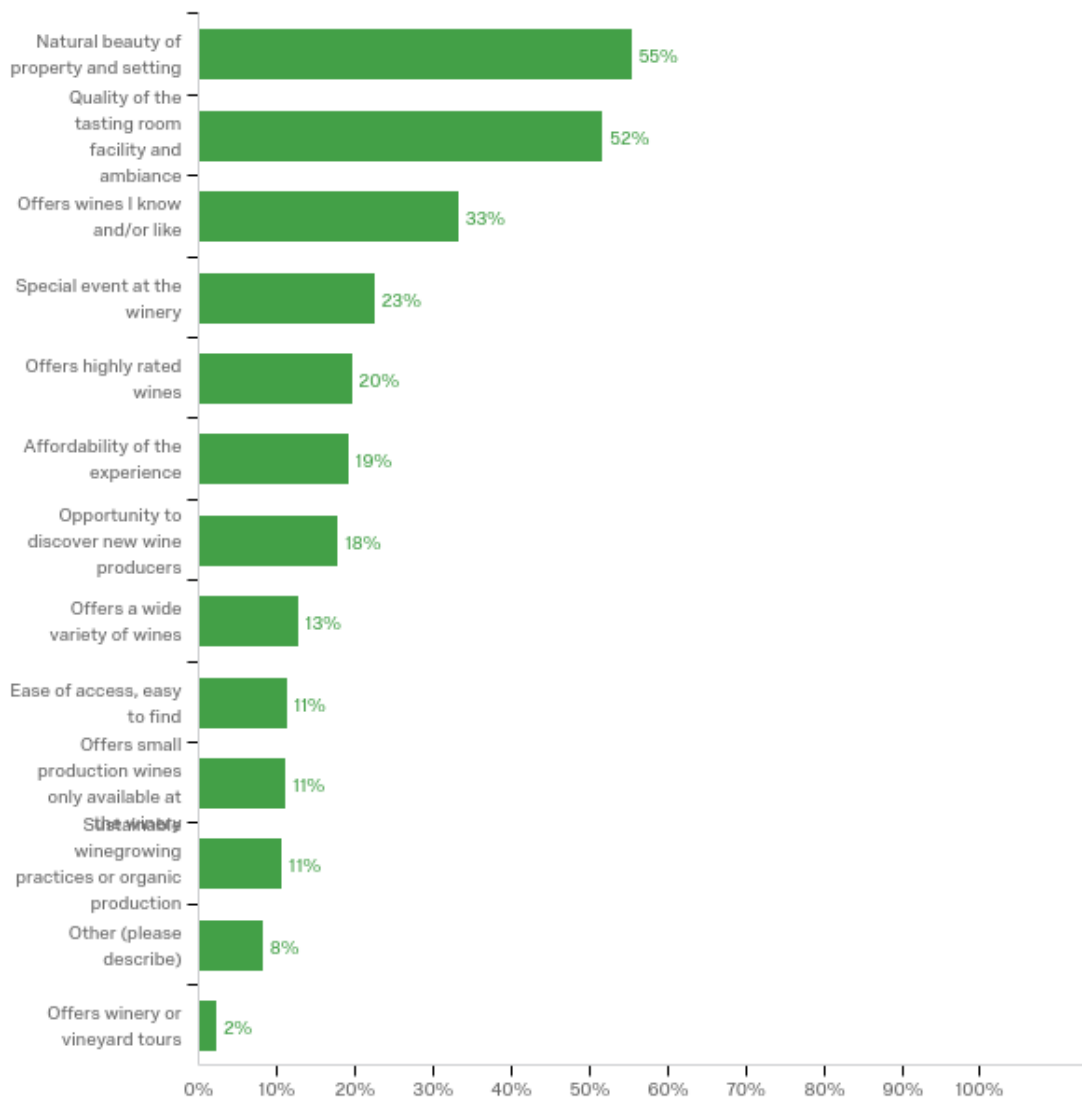
Question	Dissatisfied		Neither Satisfied nor Dissatisfied		Satisfied		Satisfaction varied greatly by winery		Don't Know		Total
Quality of the wines	0%	3	2%	14	66%	446	31%	209	0%	2	674
Value of the wines for their price	1%	9	10%	67	69%	464	19%	125	1%	6	671
Cost of tasting fees	5%	36	25%	167	56%	373	11%	71	3%	22	669
Ease of travel to and finding the wineries	2%	12	8%	51	83%	558	7%	48	0%	1	670
Natural beauty of properties and setting	0%	0	4%	25	80%	538	16%	106	0%	1	670
Attractiveness of the facilities – architecture, décor, grounds, amenities	0%	0	6%	40	73%	490	20%	136	0%	3	669
Presentation and knowledge of winery hosts	1%	9	5%	33	69%	465	23%	154	1%	10	671
Friendliness/hospitality of winery staff	2%	11	1%	10	77%	516	20%	131	0%	2	670

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

Question	Disagree		Neither Agree nor Disagree		Agree		Total
I have purchased wines from the Rogue Valley at my local retailer or a local restaurant/bar.	27%	179	14%	96	59%	396	671
I am very likely to recommend wines from the Rogue Valley to others.	1%	8	7%	47	92%	618	673
I am very likely to recommend a trip to the Rogue Valley to others.	0%	3	5%	34	94%	633	670

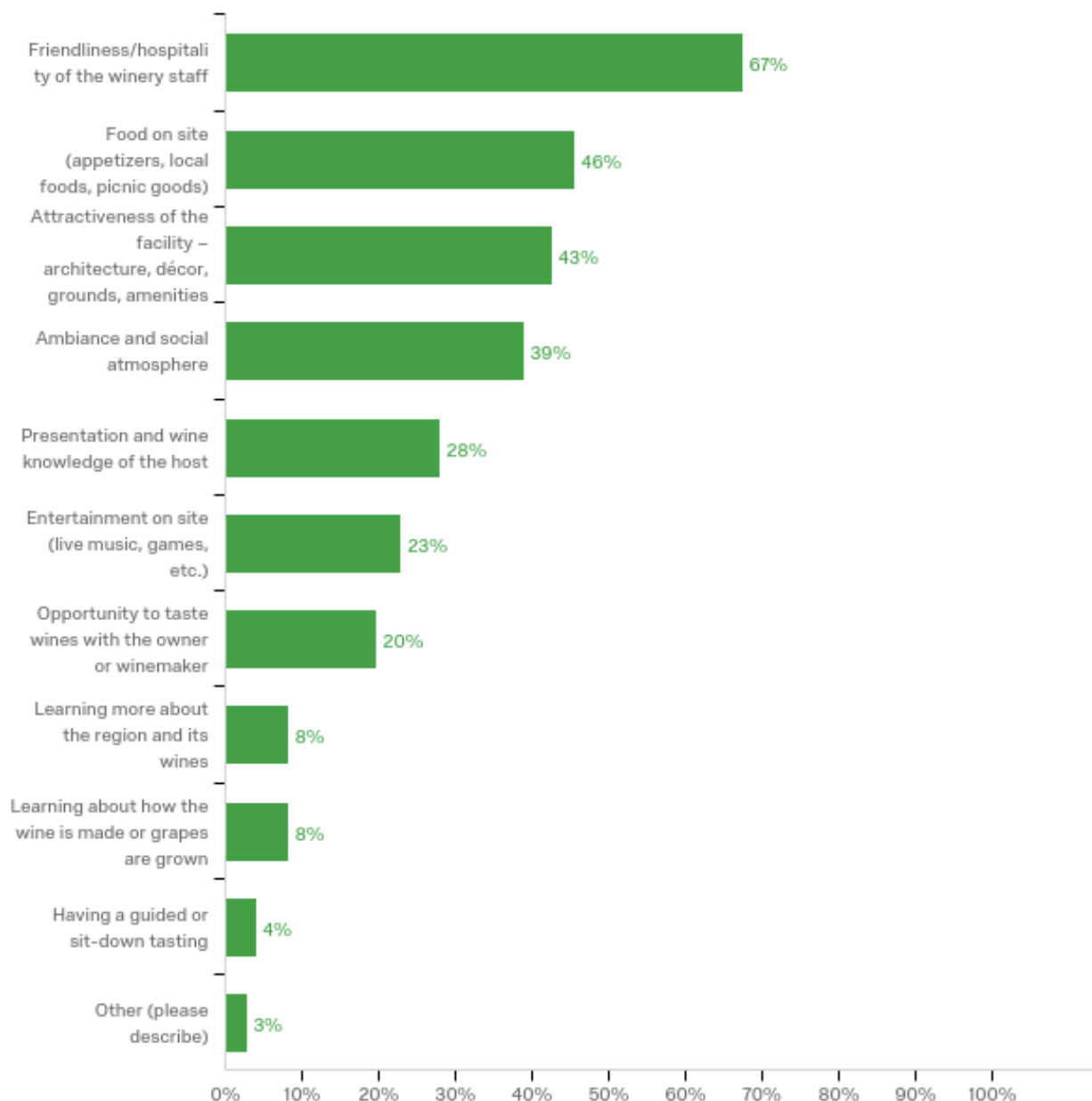
Trip Motivation & Satisfaction (Recent Wine + Residents/A2)

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=1630)



Answer	Count
Natural beauty of property and setting	904
Quality of the tasting room facility and ambiance	844
Offers wines I know and/or like	542
Special event at the winery	367
Offers highly rated wines	320
Affordability of the experience	312
Opportunity to discover new wine producers	290
Offers a wide variety of wines	207
Ease of access, easy to find	183
Offers small production wines only available at the winery	181
Sustainable winegrowing practices or organic production	173
Other (please describe)	134

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=1627)



Answer	Count
Friendliness/hospitality of the winery staff	1098
Food on site (appetizers, local foods, picnic goods)	741
Attractiveness of the facility – architecture, décor, grounds, amenities	693
Ambiance and social atmosphere	633
Presentation and wine knowledge of the host	455
Entertainment on site (live music, games, etc.)	372
Opportunity to taste wines with the owner or winemaker	320
Learning about how the wine is made or grapes are grown	133
Learning more about the region and its wines	133

Having a guided or sit-down tasting	64
Other (please describe)	44

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%	4	1%	19	68%	1095	31%	501	0%	3	1622
Value of the wines for their price	2%	29	11%	175	68%	1098	18%	295	1%	9	1606
Cost of tasting fees	6%	88	20%	317	58%	909	10%	163	7%	103	1580
Ease of travel to and finding the wineries	0%	6	5%	76	85%	1347	10%	154	0%	7	1590
Natural beauty of properties and setting	0%	2	2%	26	75%	1206	23%	362	0%	3	1599
Attractiveness of the facilities – architecture, décor, grounds, amenities	0%	2	3%	47	72%	1153	25%	393	0%	2	1597
Presentation and knowledge of winery hosts	0%	5	7%	105	71%	1131	21%	331	1%	21	1593
Friendliness/hospitality of winery staff	0%	4	3%	40	76%	1213	21%	337	0%	4	1598

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

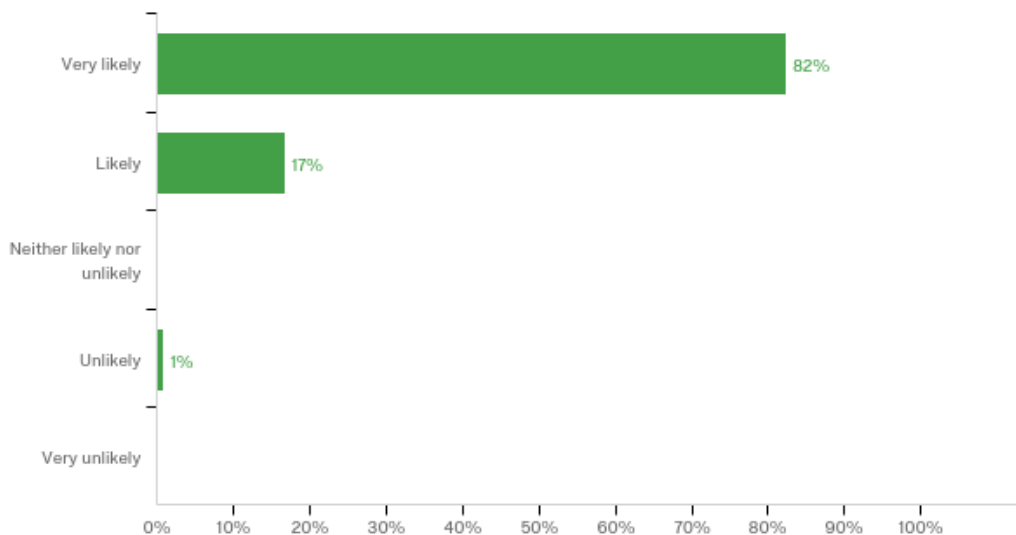
Question	Disagree		Neither Agree nor Disagree		Agree		Total
I have purchased wines from the Rogue Valley at my local retailer or a local restaurant/bar.	5%	81	5%	77	90%	1466	1624
I am very likely to recommend wines from the Rogue Valley to others.	1%	12	3%	52	96%	1556	1620
I am very likely to recommend a trip to the Rogue Valley to others.	1%	9	2%	33	97%	1574	1616

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

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

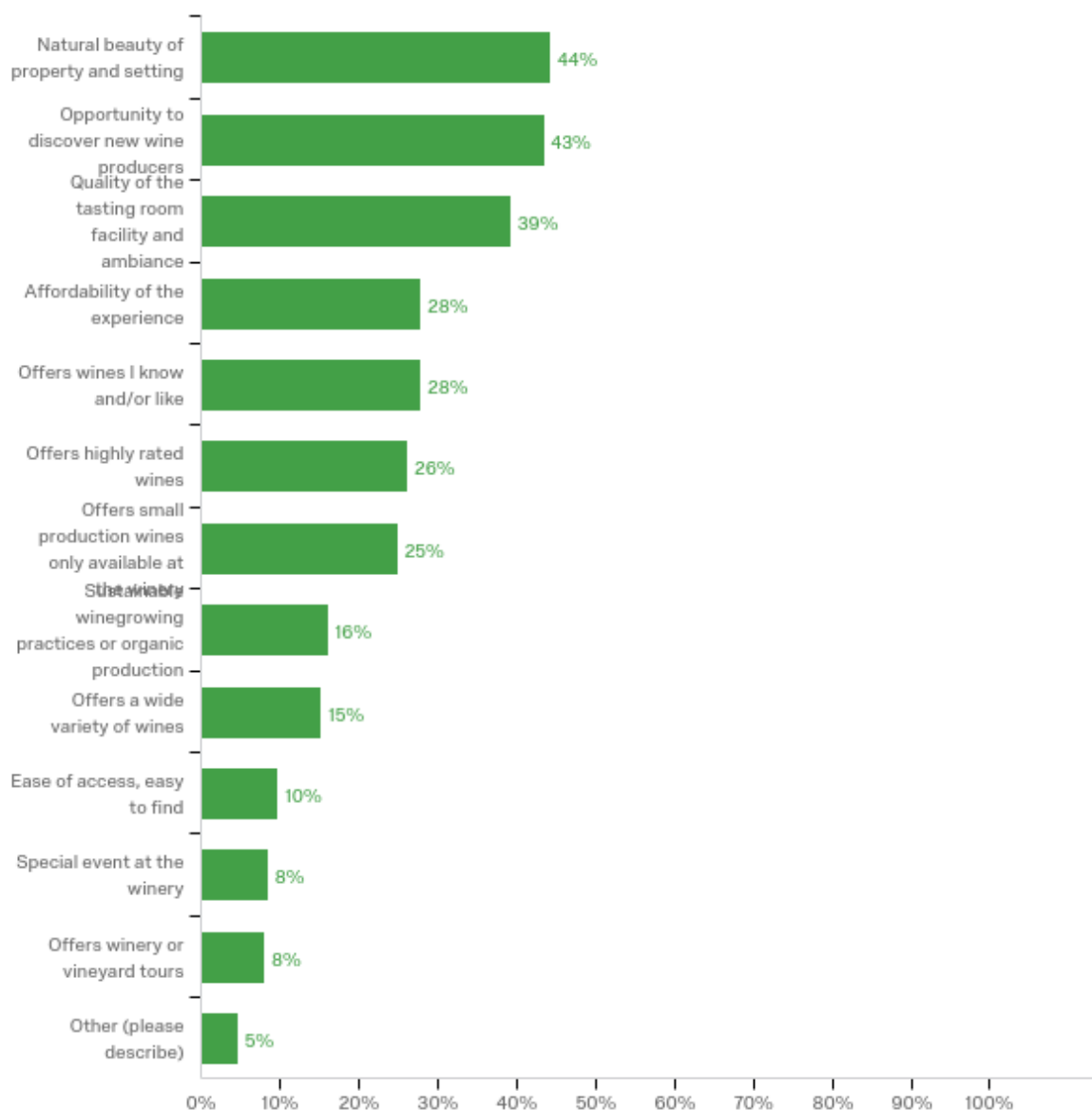
Question	Dissatisfied		Neither Satisfied nor Dissatisfied		Satisfied		Total
Ease of traveling to the area from your home/starting point	4%	10	20%	46	76%	179	235
Affordability	2%	4	12%	28	86%	202	234
Quality of accommodations	2%	5	13%	27	85%	177	209
Ease of finding accommodations	3%	6	16%	32	82%	168	206
Opportunity to view/ experience local arts, culture, and history	1%	2	19%	40	81%	174	216
Opportunity to experience farms or farm products (including wine)	2%	4	13%	28	85%	188	220
High quality local cuisine/restaurants	5%	12	22%	51	73%	167	230
Area offers a wide variety of activities for my entire family	2%	3	25%	46	74%	136	185
Terrain/ geography/ climate is conducive to outdoor recreation activity	1%	2	11%	24	88%	197	223
Retail shopping	5%	10	44%	86	51%	99	195
Scenic beauty	0%	0	3%	6	97%	232	238

Q2.2 - How likely or unlikely are you to visit the Rogue Valley again in the future? (n=239)



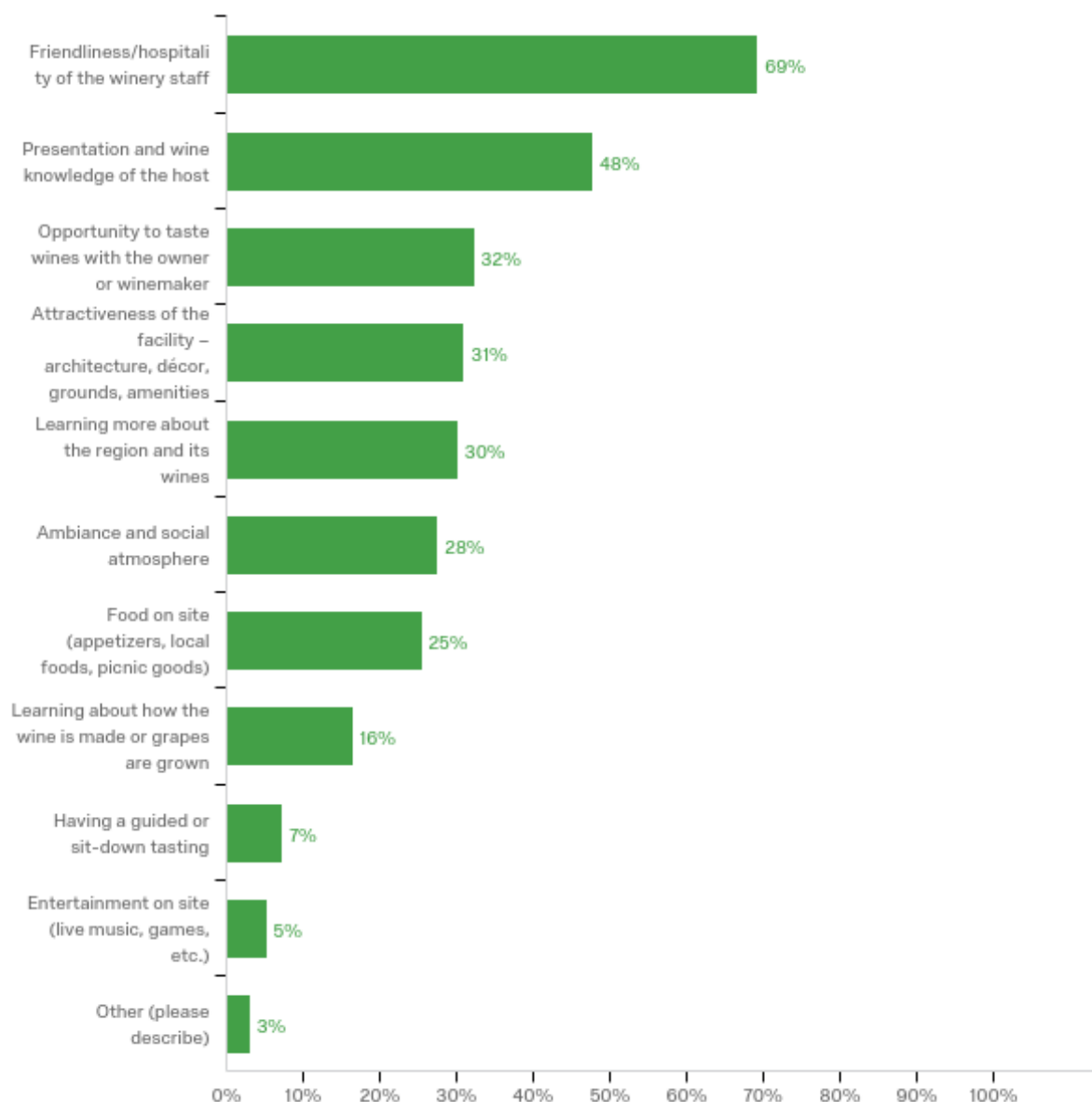
Answer	Count
Very likely	197
Likely	40
Neither likely nor unlikely	0
Unlikely	2
Very unlikely	0
Total	239

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=237)



Answer	Count
Natural beauty of property and setting	105
Opportunity to discover new wine producers	103
Quality of the tasting room facility and ambiance	93
Offers wines I know and/or like	66
Affordability of the experience	66
Offers highly rated wines	62
Offers small production wines only available at the winery	59
Sustainable winegrowing practices or organic production	38
Offers a wide variety of wines	36
Ease of access, easy to find	23
Special event at the winery	20
Offers winery or vineyard tours	19
Other (please describe)	11

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=232)

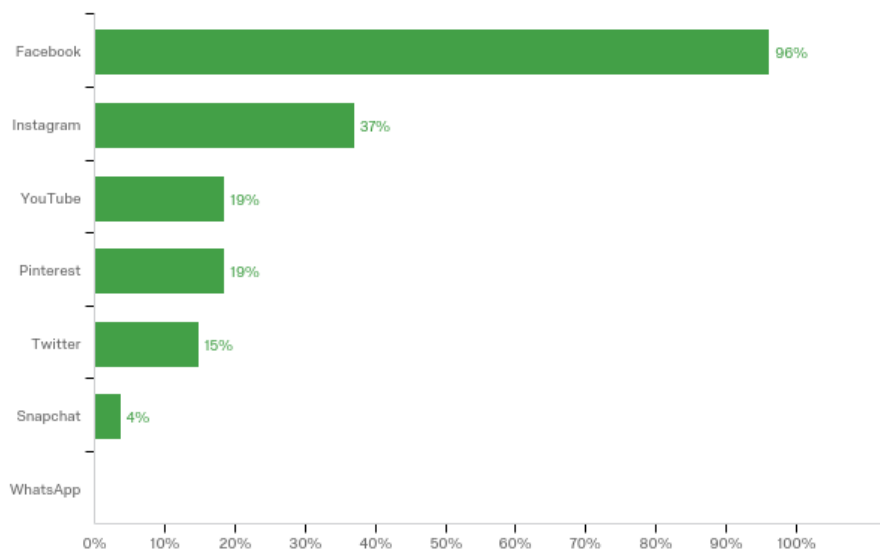


Answer	Count
Friendliness/hospitality of the winery staff	161
Presentation and wine knowledge of the host	111
Opportunity to taste wines with the owner or winemaker	75
Attractiveness of the facility – architecture, décor, grounds, amenities	72
Learning more about the region and its wines	70
Ambiance and social atmosphere	64
Food on site (appetizers, local foods, picnic goods)	59
Learning about how the wine is made or grapes are grown	38
Having a guided or sit-down tasting	17
Entertainment on site (live music, games, etc.)	12
Other (please describe)	7

Q2.5 - Which of the following resources do you typically use to select wineries and tasting rooms to visit?
Select all that apply. (n=237)

Answer	%	Count
Word of mouth (recommendation from friend/family, local resident, etc.)	71%	168
Website(s) of an individual winery or wineries	49%	115
Websites of wineries or winery associations	42%	99
Free travel guidebook/brochure/map	41%	97
Wine publication, online or in print (e.g. Wine Spectator, Wine & Spirits)	40%	95
Recommendation from a local restaurant	29%	69
Road signs or billboards	23%	55
Restaurant, wine store, or retailer referral	23%	54
Reviews website (e.g. Yelp, TripAdvisor)	20%	48
Mapping website (e.g. Google Maps)	20%	47
Concierge or other hotel/B&B staff	19%	46
Visitors/welcome center	14%	34
Magazine/newspaper (not wine-specific)	14%	33
Social Media (e.g. Facebook, Instagram, etc.)	12%	29
Other travel-related website	12%	28
Commercial travel guidebook (e.g. Lonely Planet)	8%	19
Other (please specify)	7%	16
Online travel agency (e.g. Expedia, Priceline)	3%	7
Traditional travel agency	0%	0

Q2.5b - Which social media platform(s) do you use for selecting wineries? (n=27)

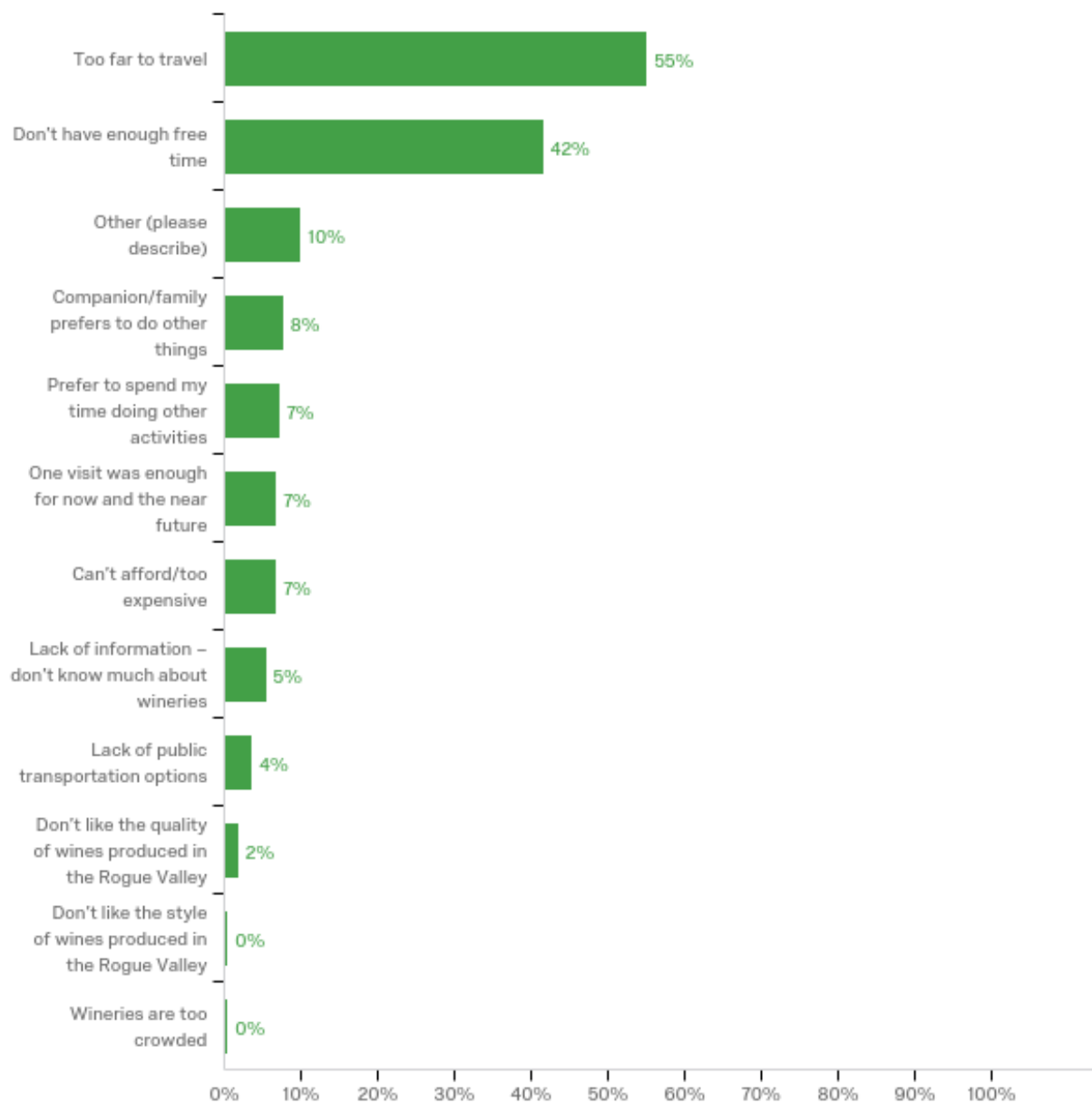


Answer	Count
Facebook	26
Instagram	10
YouTube	5
Pinterest	5
Twitter	4
Snapchat	1

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	1%	2	1%	3	66%	156	32%	76	0%	0	237
Value of the wines for their price	1%	2	12%	29	62%	148	24%	57	0%	1	237
Cost of tasting fees	8%	18	17%	39	59%	140	14%	33	3%	6	236
Ease of travel to and finding the wineries	3%	6	13%	30	76%	179	8%	20	0%	1	236
Natural beauty of properties and setting	0%	0	4%	9	75%	177	20%	48	0%	1	235
Attractiveness of the facilities – architecture, décor, grounds, amenities	0%	0	8%	19	66%	156	25%	59	0%	1	235
Presentation and knowledge of winery hosts	0%	0	6%	13	65%	153	28%	65	1%	3	234
Friendliness/hospitality of winery staff	0%	0	4%	10	71%	168	24%	56	0%	1	235

Q2.7 - What factors prevent you from returning to or visiting wineries in the Rogue Valley more frequently? Select all that apply. (n=221)



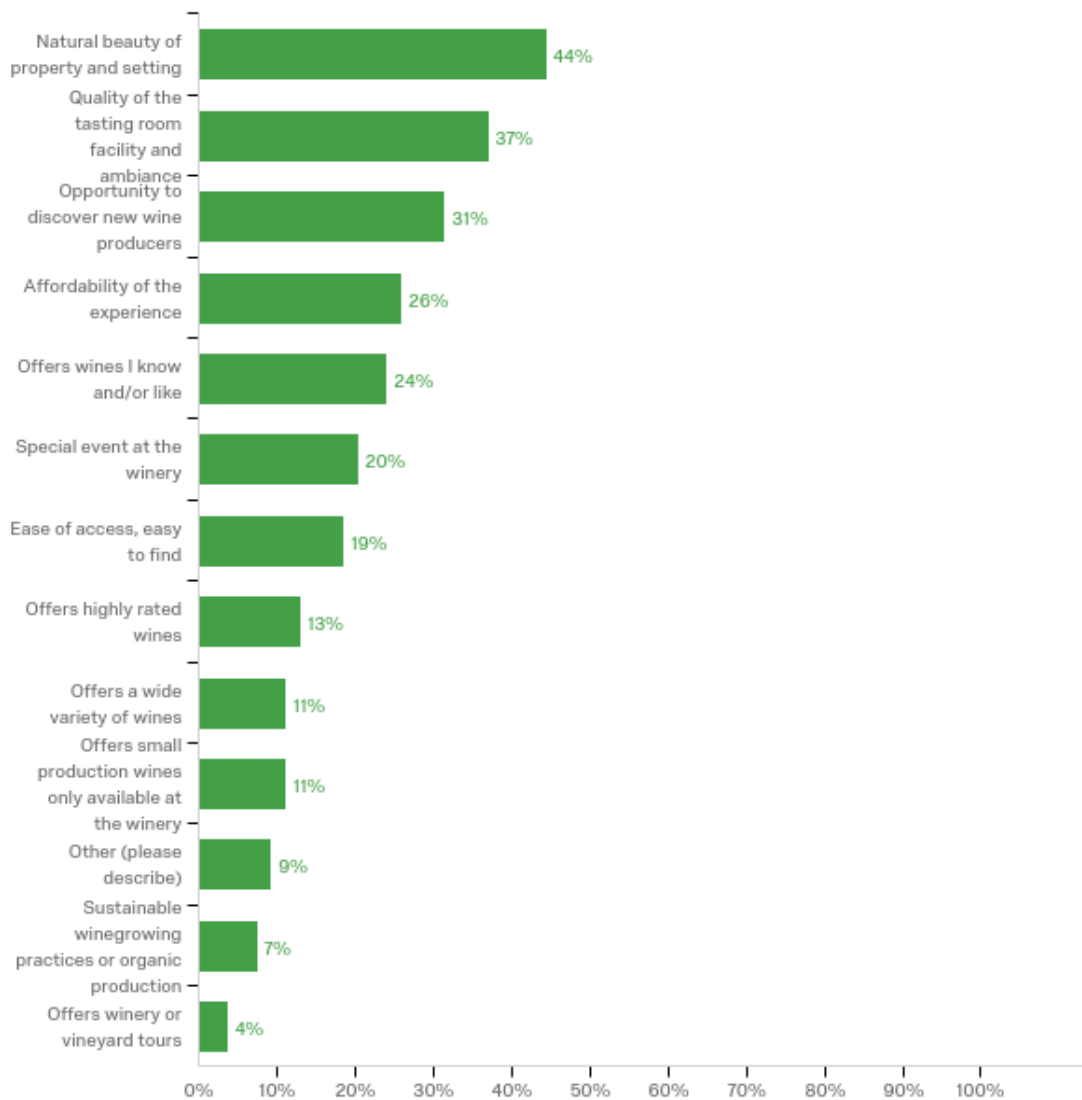
Answer	Count
Too far to travel	122
Don't have enough free time	92
Other (please describe)	22
Companion/family prefers to do other things	17
Prefer to spend my time doing other activities	16
One visit was enough for now and the near future	15
Can't afford/too expensive	15
Lack of information – don't know much about wineries	12
Lack of public transportation options	8
Don't like the quality of wines produced in the Rogue Valley	4
Wineries are too crowded	1
Don't like the style of wines produced in the Rogue Valley	1

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

Question	Disagree		Neither Agree nor Disagree		Agree		Total
I am very likely to recommend wines from the Rogue Valley to others.	1%	3	14%	33	85%	199	235
I have purchased wines from the Rogue Valley at my local retailer or a local restaurant/bar.	30%	70	10%	23	60%	141	234
I am very likely to recommend a trip to the Rogue Valley to others.	0%	1	8%	19	92%	216	236

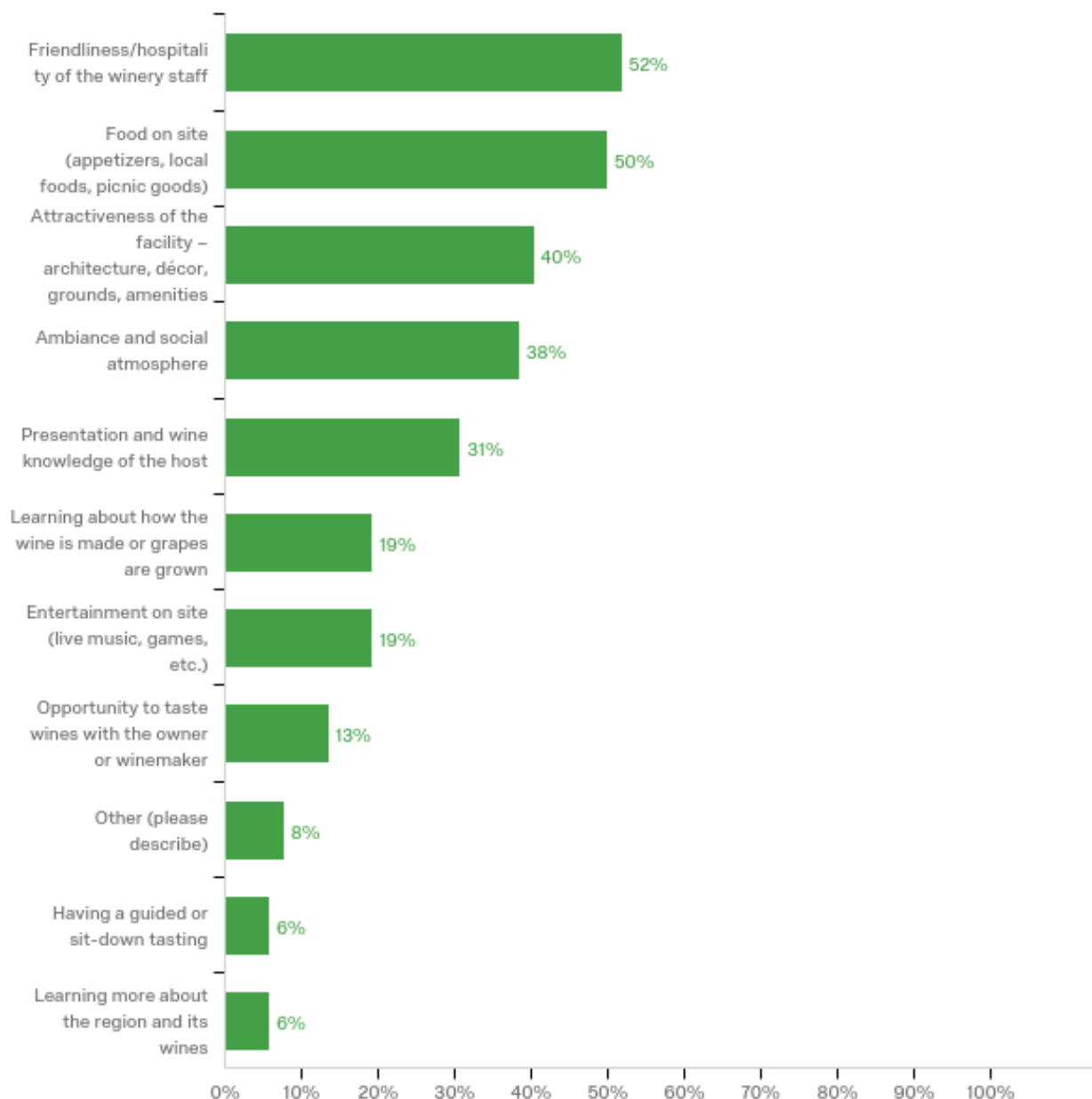
Trip Motivation & Satisfaction (Past Winery Visitors + Residents/B2)

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=54)



Answer	Count
Natural beauty of property and setting	24
Quality of the tasting room facility and ambiance	20
Opportunity to discover new wine producers	17
Affordability of the experience	14
Offers wines I know and/or like	13
Special event at the winery	11
Ease of access, easy to find	10
Offers highly rated wines	7
Offers small production wines only available at the winery	6
Offers a wide variety of wines	6
Other (please describe)	5
Sustainable winegrowing practices or organic production	4

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=52)



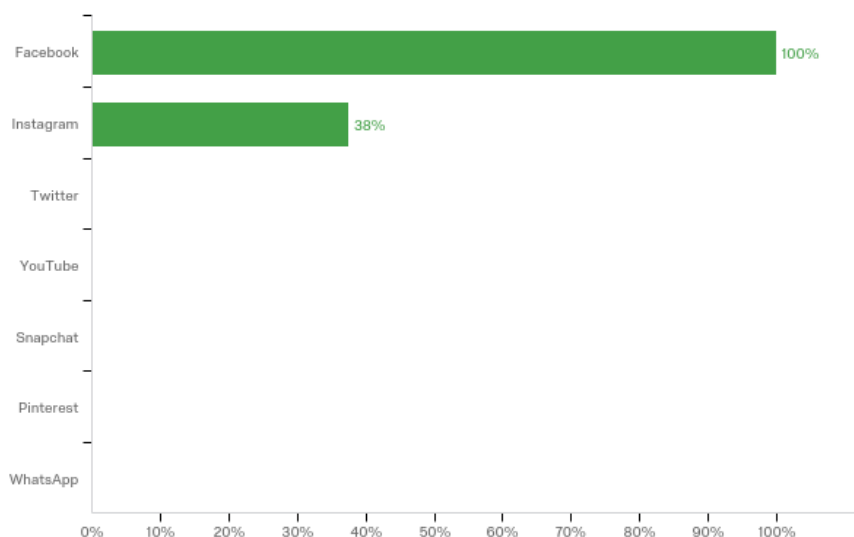
Answer	Count
Friendliness/hospitality of the winery staff	27
Food on site (appetizers, local foods, picnic goods)	26
Attractiveness of the facility – architecture, décor, grounds, amenities	21
Ambiance and social atmosphere	20
Presentation and wine knowledge of the host	16
Entertainment on site (live music, games, etc.)	10
Learning about how the wine is made or grapes are grown	10
Opportunity to taste wines with the owner or winemaker	7
Other (please describe)	4

Learning more about the region and its wines	3
Having a guided or sit-down tasting	3

Q2.5 - Which of the following resources do you typically use to select wineries and tasting rooms to visit?
Select all that apply. (n=52)

Answer	%	Count
Word of mouth (recommendation from friend/family, local resident, etc.)	69%	36
Wine publication, online or in print (e.g. Wine Spectator, Wine & Spirits)	33%	17
Website(s) of an individual winery or wineries	33%	17
Free travel guidebook/brochure/map	27%	14
Magazine/newspaper (not wine-specific)	25%	13
Websites of wineries or winery associations	23%	12
Road signs or billboards	19%	10
Restaurant, wine store, or retailer referral	19%	10
Social Media (e.g. Facebook, Instagram, etc.)	15%	8
Recommendation from a local restaurant	12%	6
Mapping website (e.g. Google Maps)	10%	5
Concierge or other hotel/B&B staff	8%	4
Other travel-related website	8%	4
Other (please specify)	6%	3
Visitors/welcome center	4%	2
Reviews website (e.g. Yelp, TripAdvisor)	4%	2
Commercial travel guidebook (e.g. Lonely Planet)	2%	1
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=8)



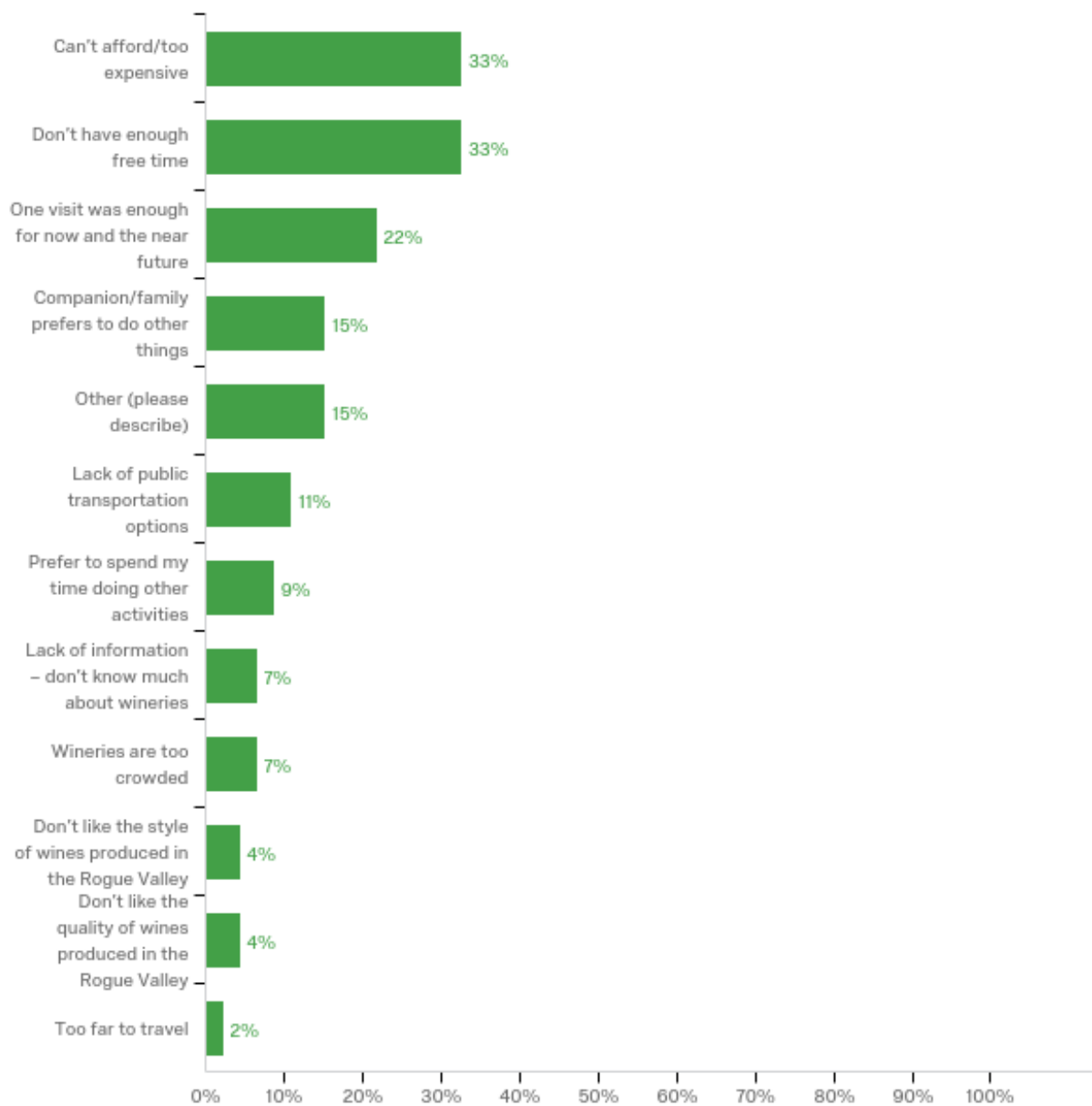
Answer	Count
Facebook	8
Instagram	3
Twitter	0
YouTube	0

Snapchat	0
Pinterest	0
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	2%	1	8%	4	54%	28	37%	19	0%	0	52
Value of the wines for their price	8%	4	16%	8	56%	28	20%	10	0%	0	50
Cost of tasting fees	17%	8	21%	10	50%	24	10%	5	2%	1	48
Ease of travel to and finding the wineries	2%	1	11%	5	71%	32	16%	7	0%	0	45
Natural beauty of properties and setting	0%	0	4%	2	82%	37	13%	6	0%	0	45
Attractiveness of the facilities – architecture, décor, grounds, amenities	0%	0	9%	4	72%	31	19%	8	0%	0	43
Presentation and knowledge of winery hosts	0%	0	13%	6	67%	30	18%	8	2%	1	45
Friendliness/hospitality of winery staff	2%	1	9%	4	63%	27	23%	10	2%	1	43

Q2.7 - What factors prevent you from returning to or visiting wineries in the Rogue Valley more frequently? (n=46)



Answer	Count
Don't have enough free time	15
Can't afford/too expensive	15
One visit was enough for now and the near future	10
Companion/family prefers to do other things	7
Other (please describe)	7
Lack of public transportation options	5
Prefer to spend my time doing other activities	4
Lack of information – don't know much about wineries	3
Wineries are too crowded	3
Don't like the quality of wines produced in the Rogue Valley	2
Don't like the style of wines produced in the Rogue Valley	2
Too far to travel	1

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

Question	Disagree		Neither Agree nor Disagree		Agree		Total
I have purchased wines from the Rogue Valley at my local retailer or a local restaurant/bar.	10%	5	10%	5	81%	42	52
I am very likely to recommend wines from the Rogue Valley to others.	0%	0	12%	6	88%	46	52
I am very likely to recommend a trip to the Rogue Valley to others.	0%	0	10%	5	90%	46	51

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

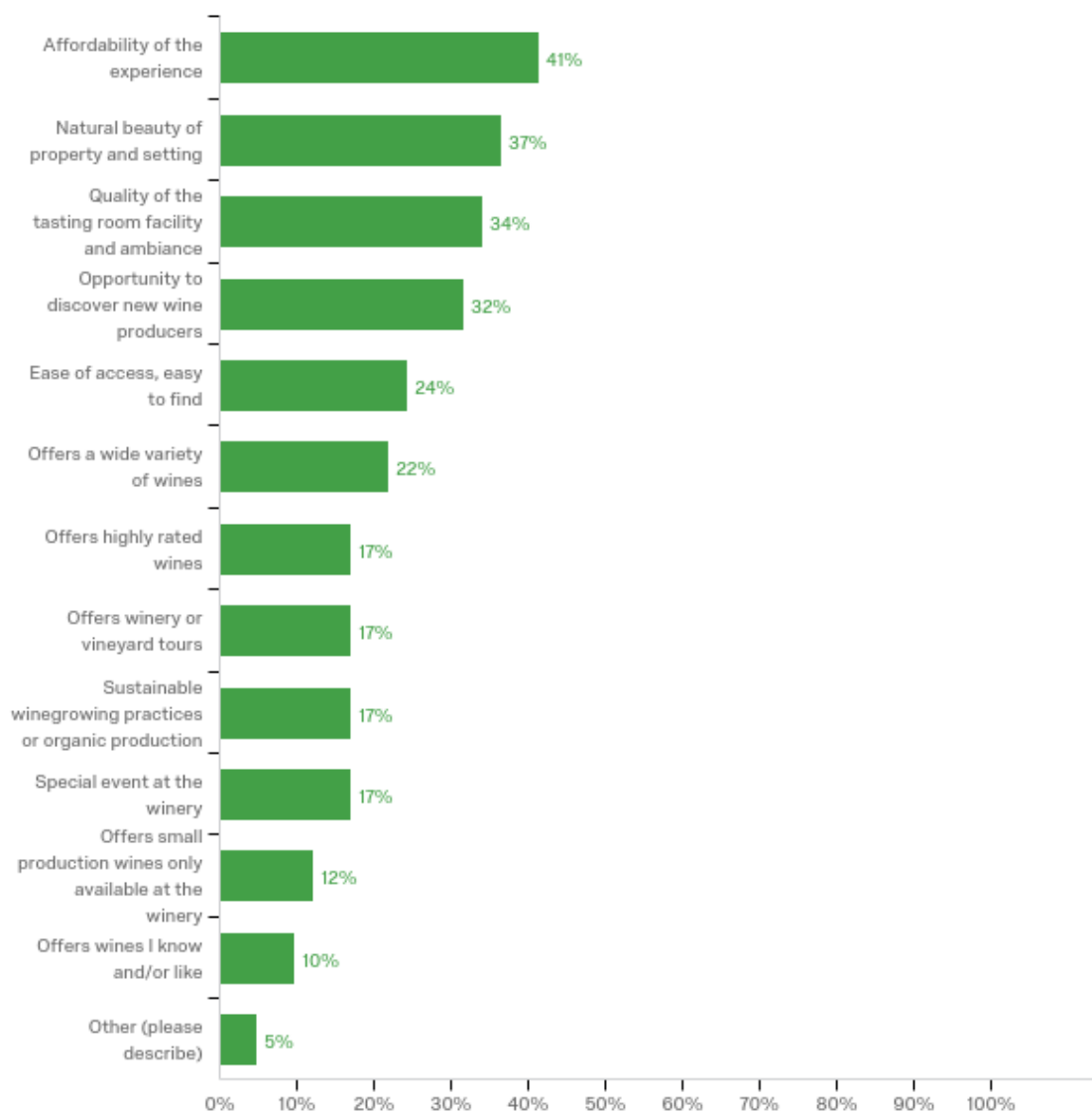
QC1.1.1 - Do you enjoy visiting wineries and tasting rooms? (n=47)

Answer	Count
Yes	42
Don't know/never tried	4
No	1
Total	47

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=46)

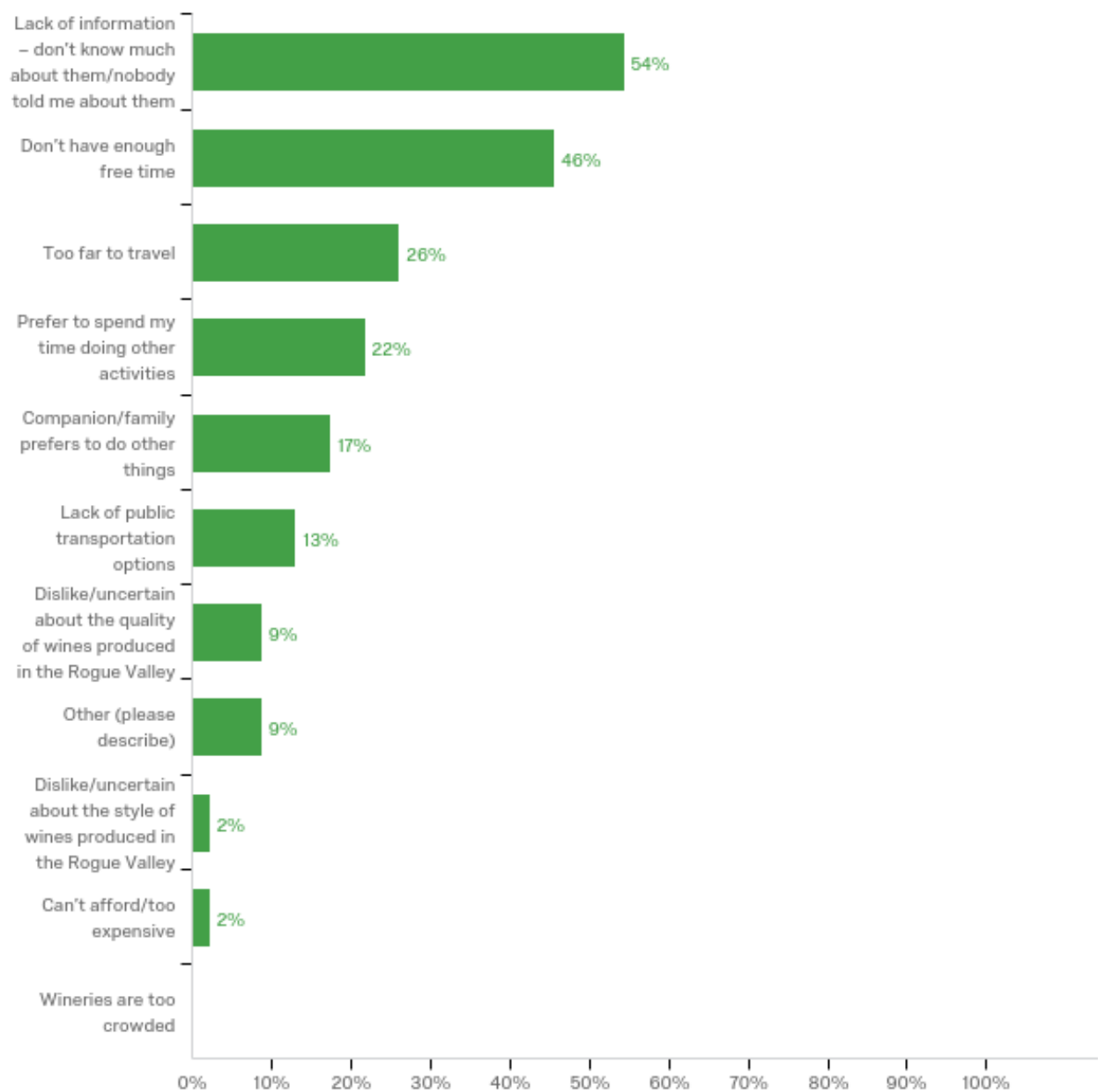
Answer	Count
Natural beauty of property and setting	22
Affordability of the experience	18
Ease of access, easy to find	13
Quality of the tasting room facility and ambiance	12
Offers wines I know and/or like	10
Offers a wide variety of wines	10
Opportunity to discover new wine producers	9
Offers highly rated wines	9
Offers winery or vineyard tours	8
Sustainable winegrowing practices or organic production	7
Offers small production wines only available at the winery	6
Special event at the winery	6
Other (please describe)	4

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=41)



Answer	Count
Affordability of the experience	17
Natural beauty of property and setting	15
Quality of the tasting room facility and ambiance	14
Opportunity to discover new wine producers	13
Ease of access, easy to find	10
Offers a wide variety of wines	9
Offers highly rated wines	7
Offers winery or vineyard tours	7
Sustainable winegrowing practices or organic production	7
Special event at the winery	7
Offers small production wines only available at the winery	5
Offers wines I know and/or like	4
Other (please describe)	2

QC1.1.4 - What factors have prevented you from visiting a winery on your latest trip to the Rogue Valley?
 Select all that apply. (n=46)

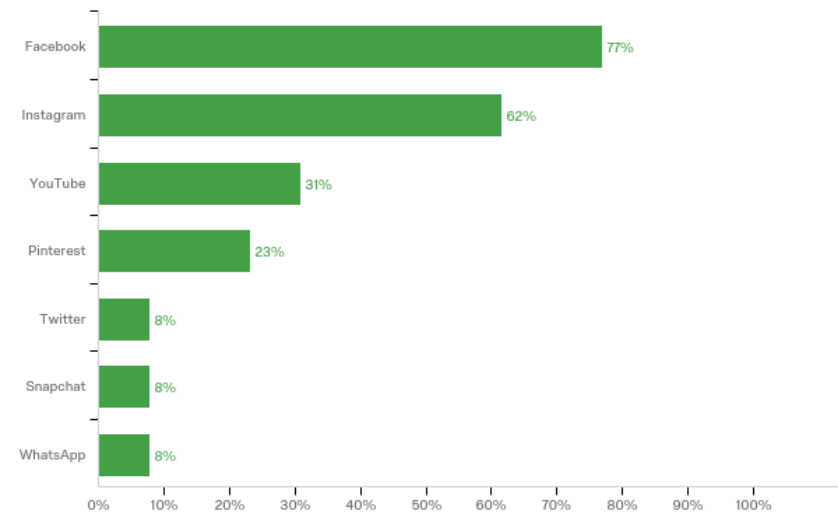


Answer	Count
Lack of information – don't know much about them/nobody told me about them	25
Don't have enough free time	21
Too far to travel	12
Prefer to spend my time doing other activities	10
Companion/family prefers to do other things	8
Lack of public transportation options	6
Dislike/uncertain about the quality of wines produced in the Rogue Valley	4
Other (please describe)	4
Can't afford/too expensive	1
Dislike/uncertain about the style of wines produced in the Rogue Valley	1
Wineries are too crowded	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=45)

Answer	%	Count
Word of mouth (recommendation from friend/family, local resident, etc.)	71%	32
Free travel guidebook/brochure/map	31%	14
Website(s) of an individual winery or wineries	29%	13
Social Media (e.g. Facebook, Instagram, etc.)	29%	13
Recommendation from a local restaurant	24%	11
Wine publication, online or in print (e.g. Wine Spectator, Wine & Spirits)	22%	10
Visitors/welcome center	22%	10
Road signs or billboards	20%	9
Magazine/newspaper (not wine-specific)	18%	8
Reviews website (e.g. Yelp, TripAdvisor)	18%	8
Restaurant, wine store, or retailer referral	18%	8
Mapping website (e.g. Google Maps)	16%	7
Other travel-related website	16%	7
Concierge or other hotel/B&B staff	13%	6
Websites of winery associations	13%	6
Online travel agency (e.g. Expedia, Priceline)	7%	3
Commercial travel guidebook (e.g. Lonely Planet)	7%	3
Other (please specify)	7%	3
Traditional travel agency	0%	0
Total		171

QC1.1.5b - Which social media platform? (n=13)



Answer	Count
Facebook	10
Instagram	8
YouTube	4
Pinterest	3
Twitter	1
Snapchat	1

Demographics

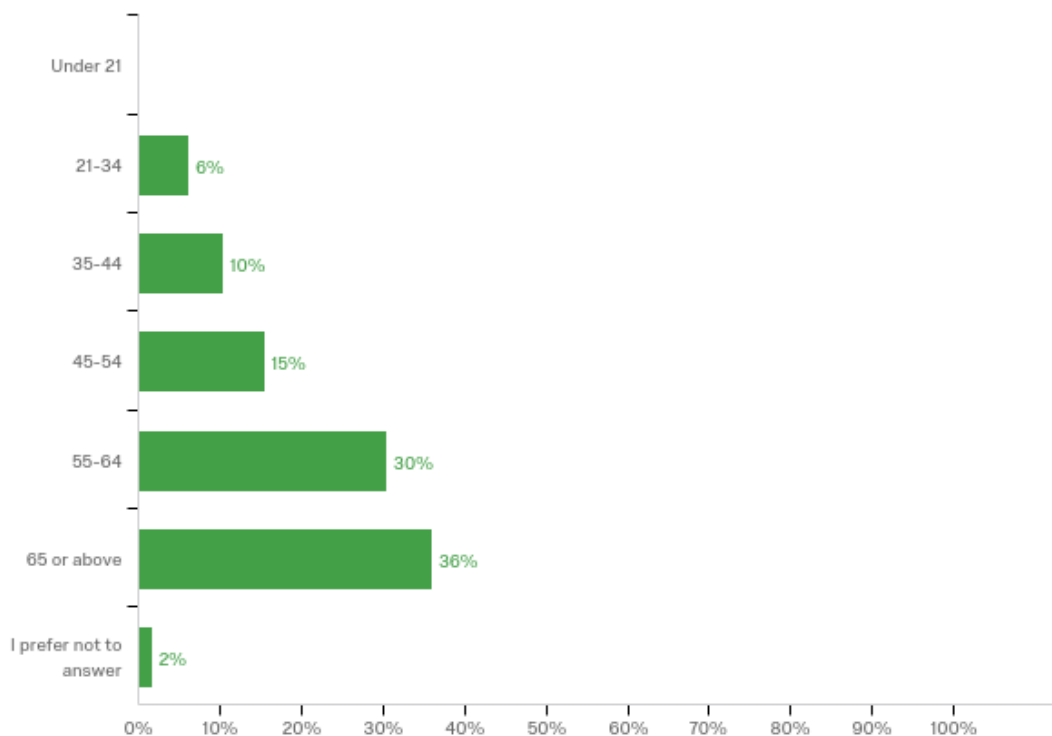
Q4.1 - Where do you currently live? (n=2647)

Answer	%	Count
USA - Please enter your home ZIP code:	99%	2624
Outside the USA - Please enter your country of residence:	1%	23
Total	100%	2647

Q4.2 - What is your gender? (n=2653)

Answer	Count
Female	1661
Male	961
I prefer not to answer	29
Nonbinary	2
Total	2653

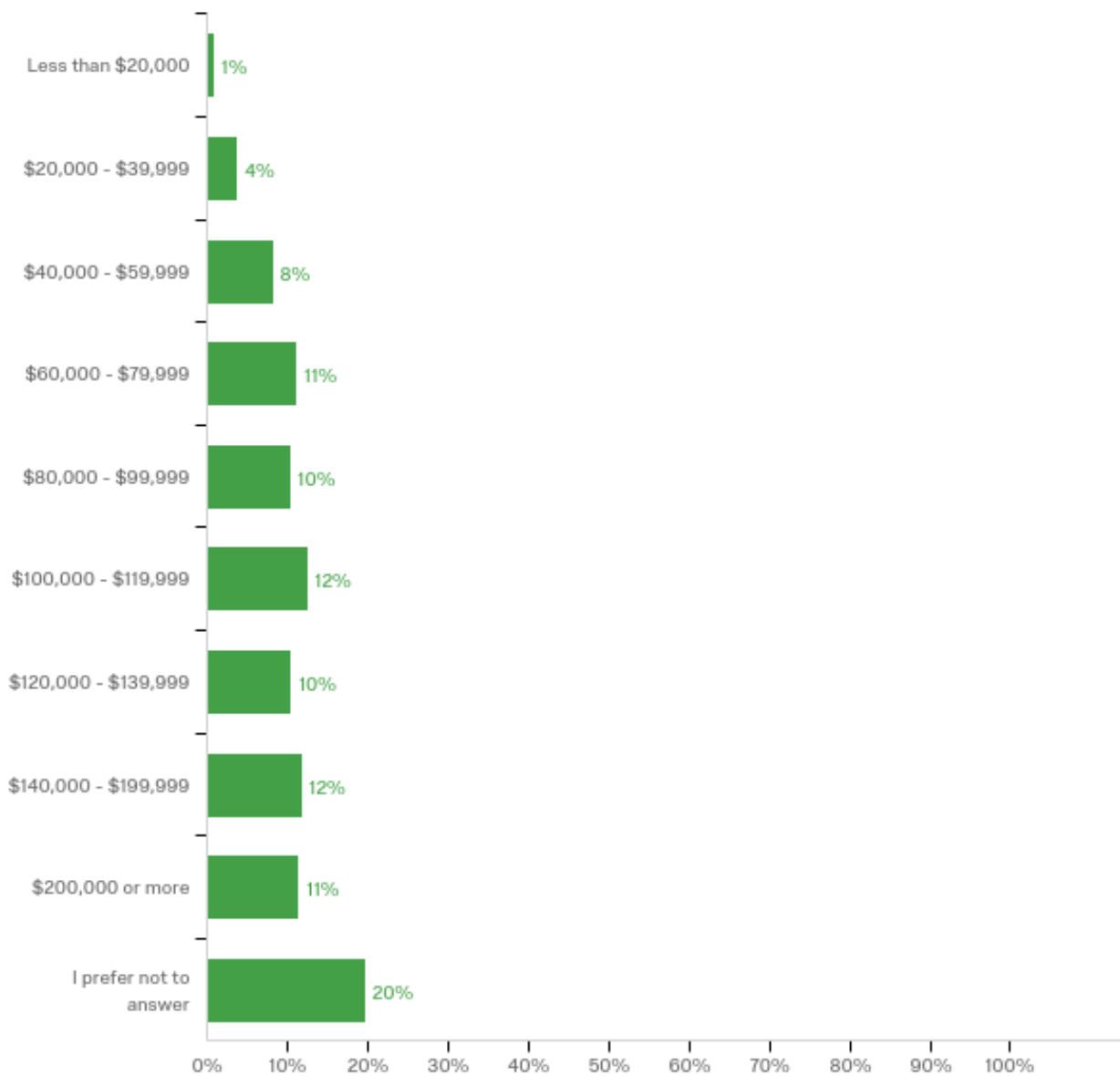
Q4.3 - Which best describes your age? (n=2657)



Answer	Count
Under 21	0
21-34	163
35-44	275
45-54	409
55-64	810
65 or above	957

I prefer not to answer	43
Total	2657

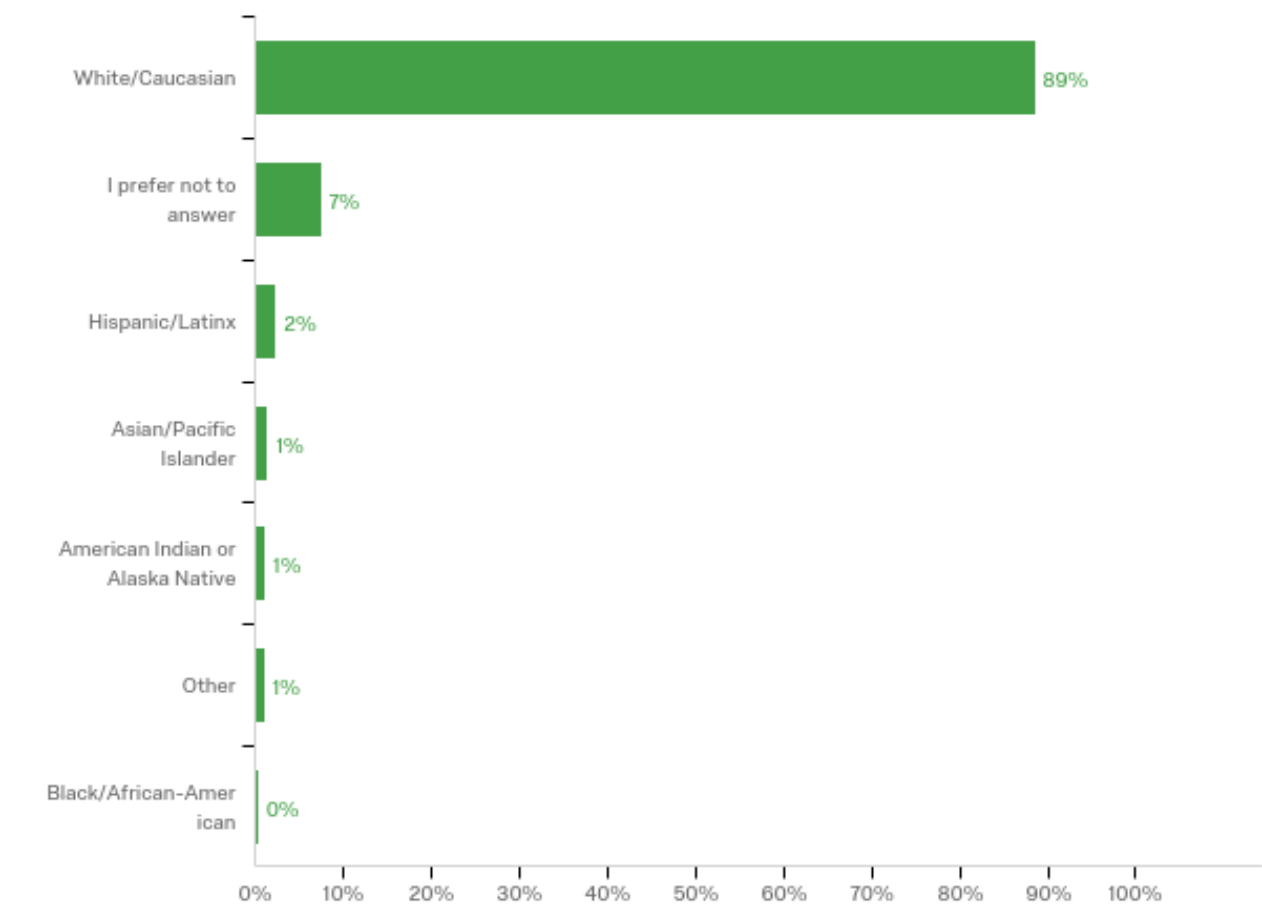
Q4.4 - Which best describes the combined annual income of all members of your household?



Answer	Count
Less than \$20,000	22
\$20,000 - \$39,999	101
\$40,000 - \$59,999	216
\$60,000 - \$79,999	294
\$80,000 - \$99,999	273
\$100,000 - \$119,999	330
\$120,000 - \$139,999	277
\$140,000 - \$199,999	311
\$200,000 or more	302

I prefer not to answer	520
Total	2646

Q4.5 - Which best describes your race or ethnic background? Select all that apply. (n=2652)



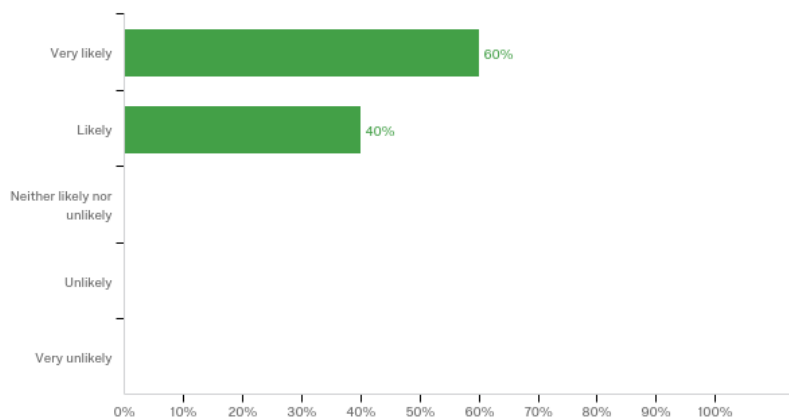
Answer	Count
White/Caucasian	2349
I prefer not to answer	198
Hispanic/Latinx	63
Asian/Pacific Islander	37
American Indian or Alaska Native	28
Other	26
Black/African-American	8

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

Q2.1 - How satisfied or dissatisfied were you with each of these qualities of the Rogue 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	0%	0	23%	10	77%	33	43
Affordability	3%	1	18%	7	79%	31	39
Quality of accommodations	3%	1	16%	6	81%	30	37
Ease of finding accommodations	0%	0	19%	7	81%	30	37
Opportunity to view/ experience local arts, culture, and history	5%	2	24%	9	70%	26	37
Opportunity to experience farms or farm products (including wine)	16%	4	36%	9	48%	12	25
High quality local cuisine/restaurants	12%	5	24%	10	63%	26	41
Area offers a wide variety of activities for my entire family	0%	0	47%	15	53%	17	32
Terrain/ geography/ climate is conducive to outdoor recreation activity	0%	0	12%	5	88%	37	42
Retail shopping	13%	4	45%	14	42%	13	31
Scenic beauty	0%	0	4%	2	96%	43	45

Q2.2 - How likely or unlikely are you to visit the Rogue Valley again in the future? (n=45)

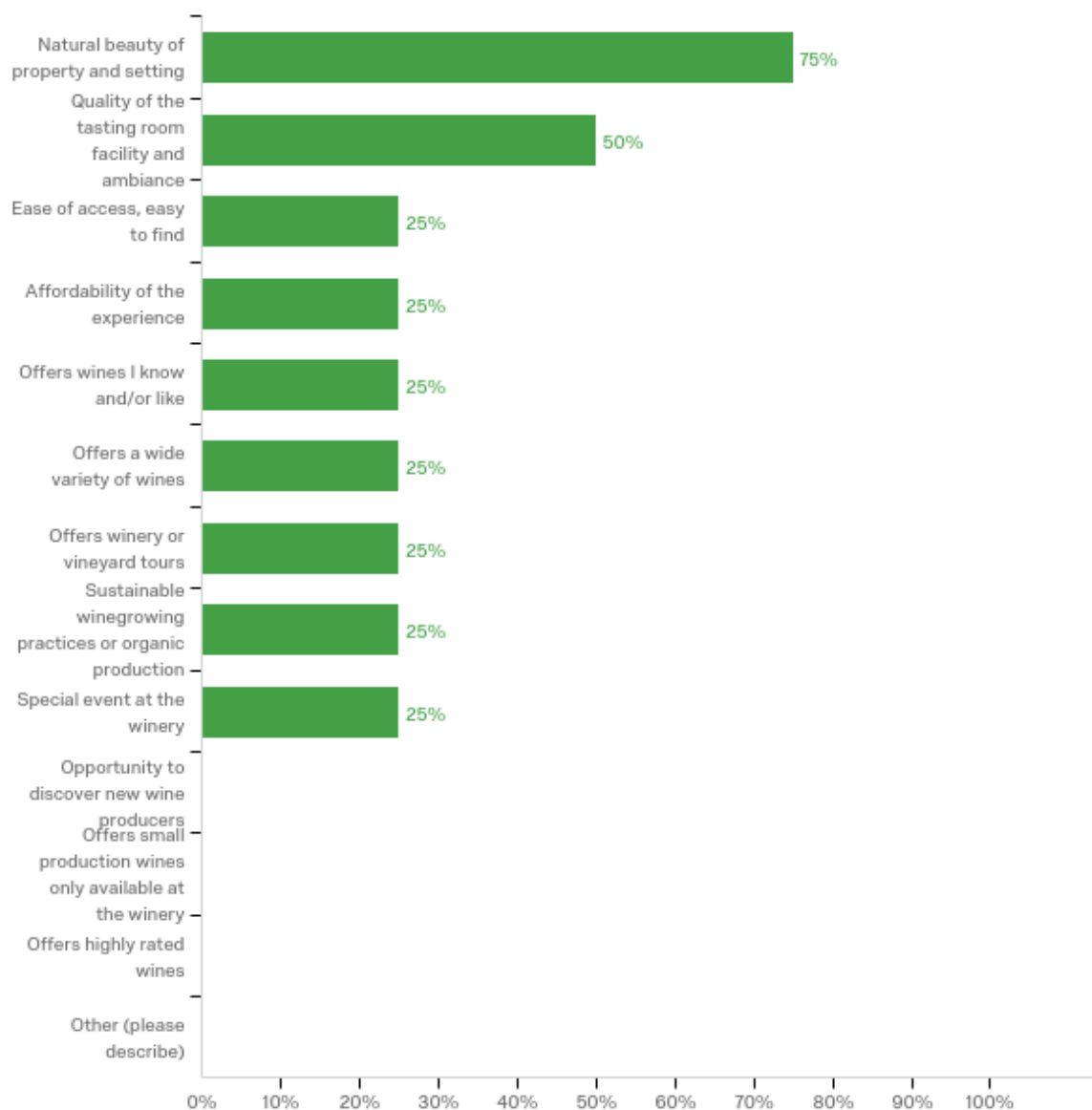


Answer	Count
Very likely	27
Likely	18
Neither likely nor unlikely	0
Unlikely	0
Very unlikely	0
Total	45

QC2.1.1 - Do you enjoy visiting wineries and tasting rooms? (n=5)

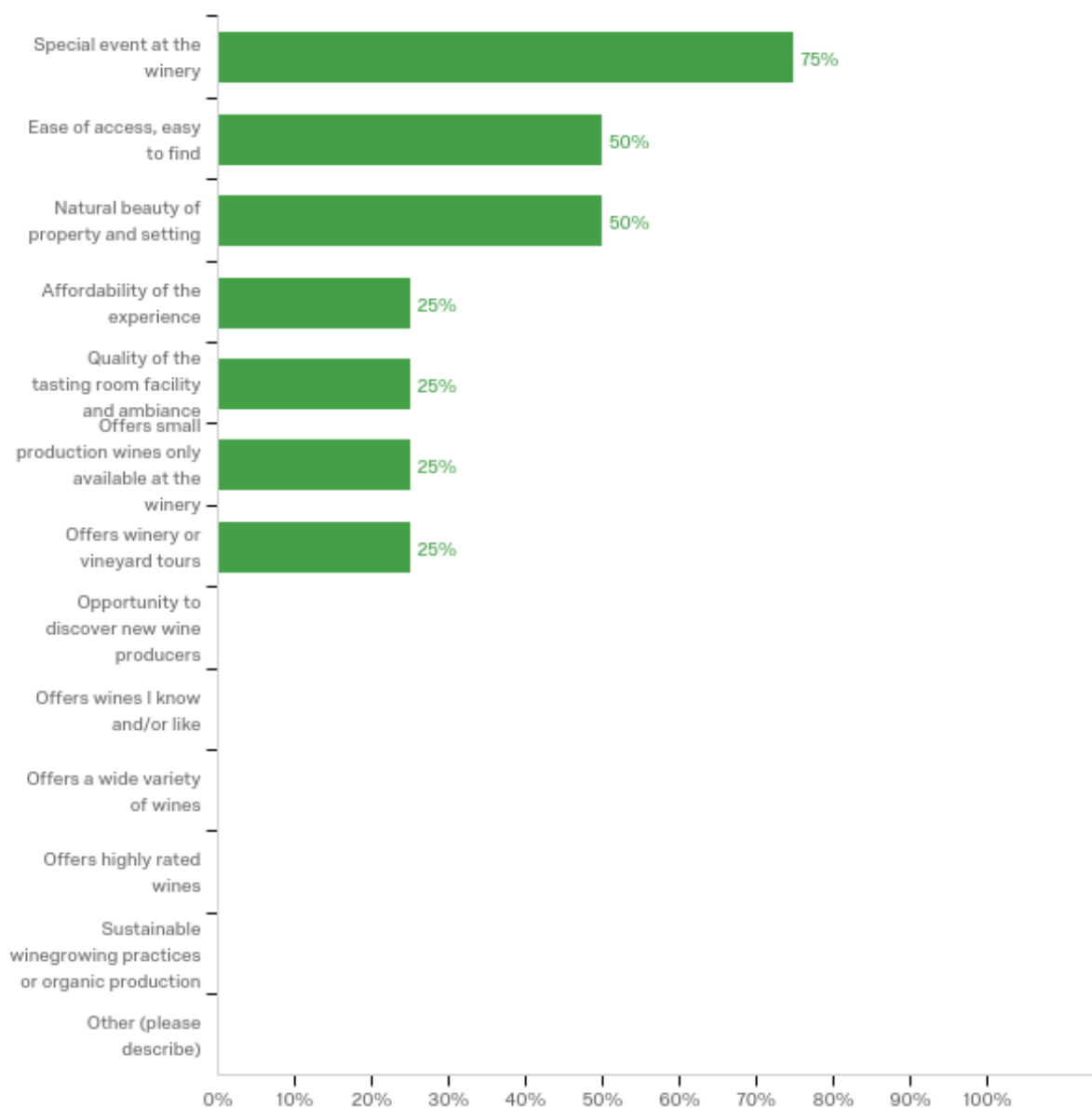
Answer	%	Count
Yes	80%	4
No	20%	1
Don't know/never tried	0%	0
Total	100%	5

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=4)



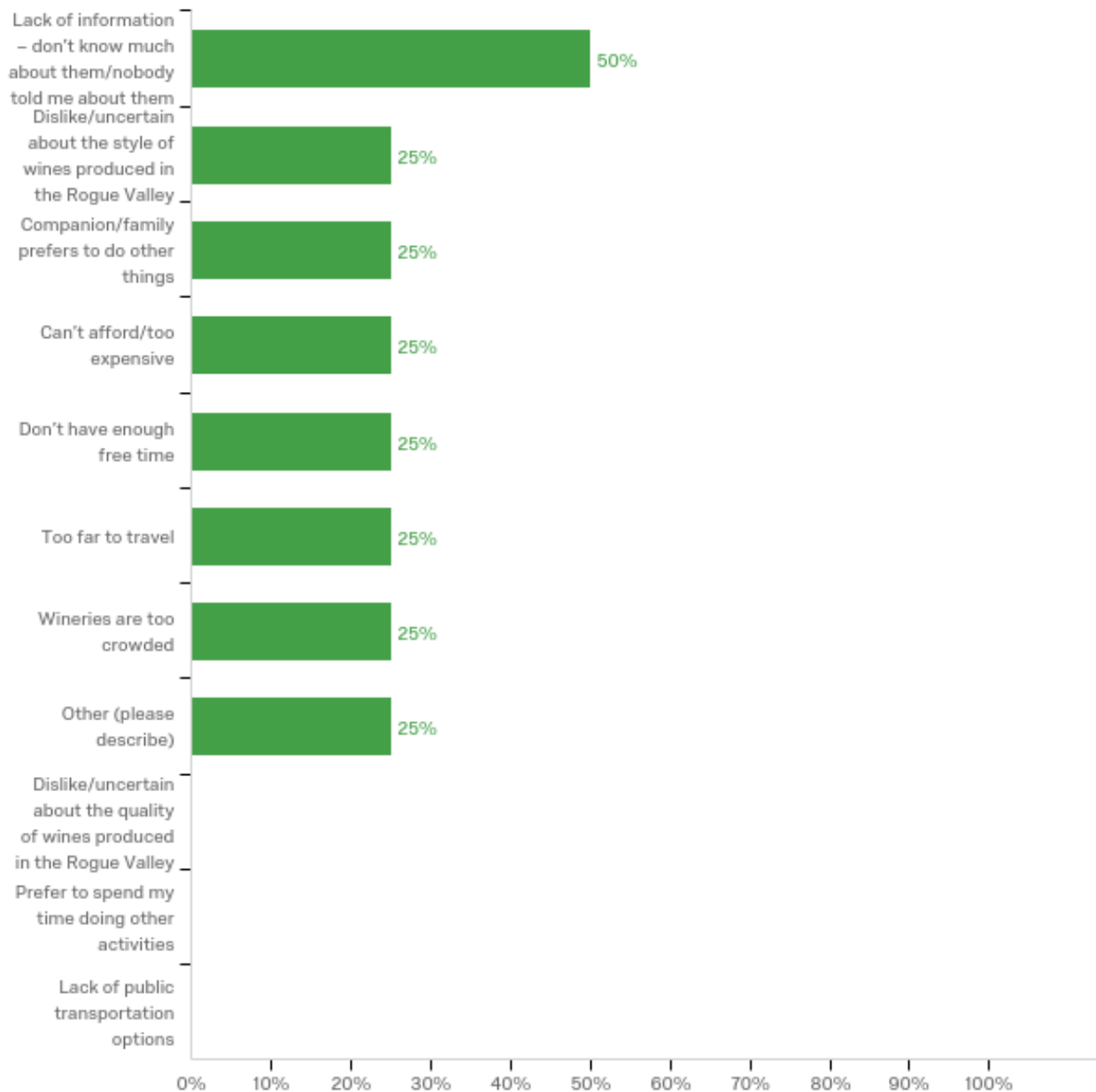
Answer	Count
Natural beauty of property and setting	3
Quality of the tasting room facility and ambiance	2
Ease of access, easy to find	1
Special event at the winery	1
Offers wines I know and/or like	1
Affordability of the experience	1
Sustainable winegrowing practices or organic production	1
Offers winery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



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

QC2.1.4 - What factors have prevented you from visiting a winery in the Rogue Valley? Select all that apply. (n=4)



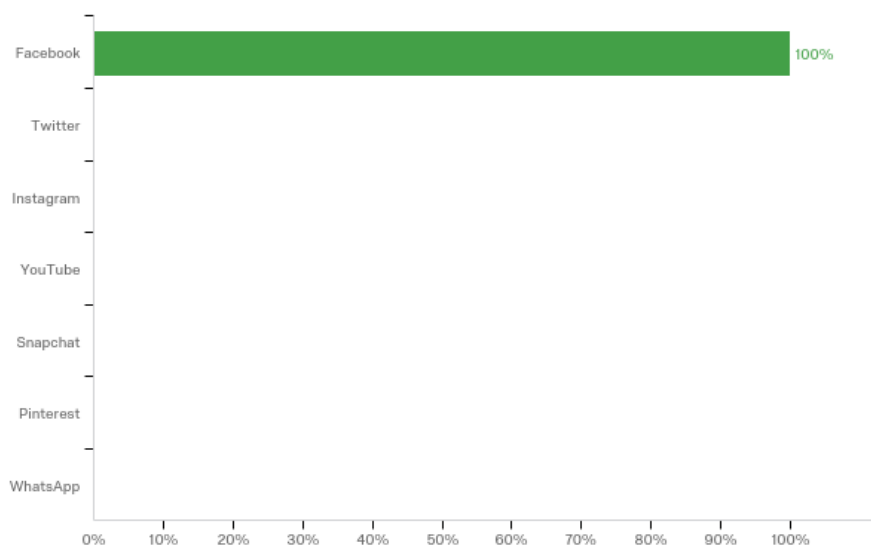
Answer	Count
Lack of information – don't know much about them/nobody told me about them	2
Dislike/uncertain about the style of wines produced in the Rogue Valley	1
Wineries are too crowded	1
Companion/family prefers to do other things	1
Can't afford/too expensive	1
Too far to travel	1
Other (please describe)	1
Don't have enough free time	1
Dislike/uncertain about the quality of wines produced in the Rogue Valley	0

Prefer to spend my time doing other activities	0
Lack of public transportation options	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=4)

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

QC2.1.5b - Which social media platform? (n=2)

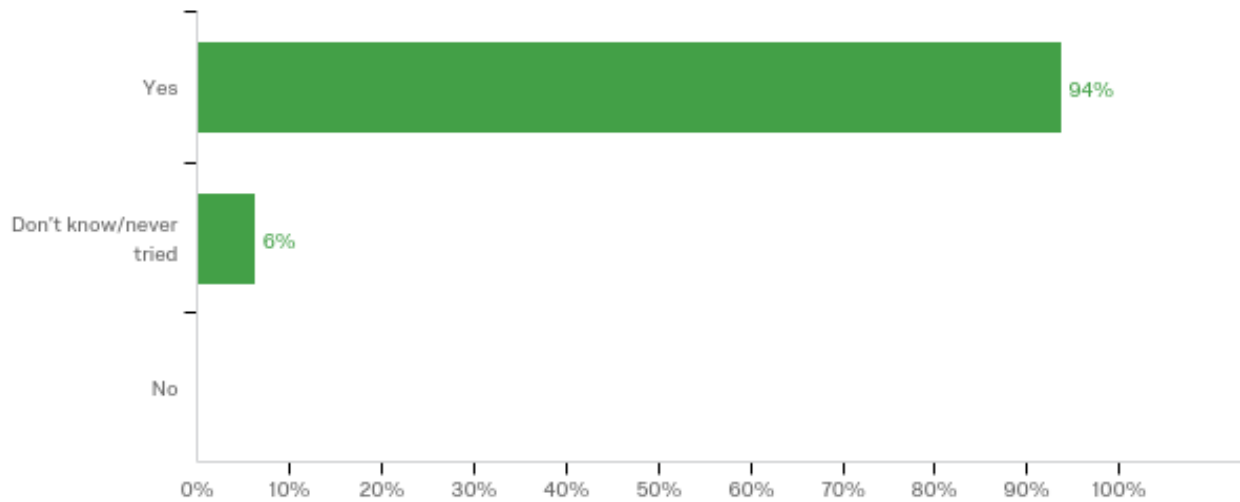


Answer	Count
Facebook	2
Twitter	0
Instagram	0
YouTube	0

Snapchat	0
Pinterest	0
WhatsApp	0

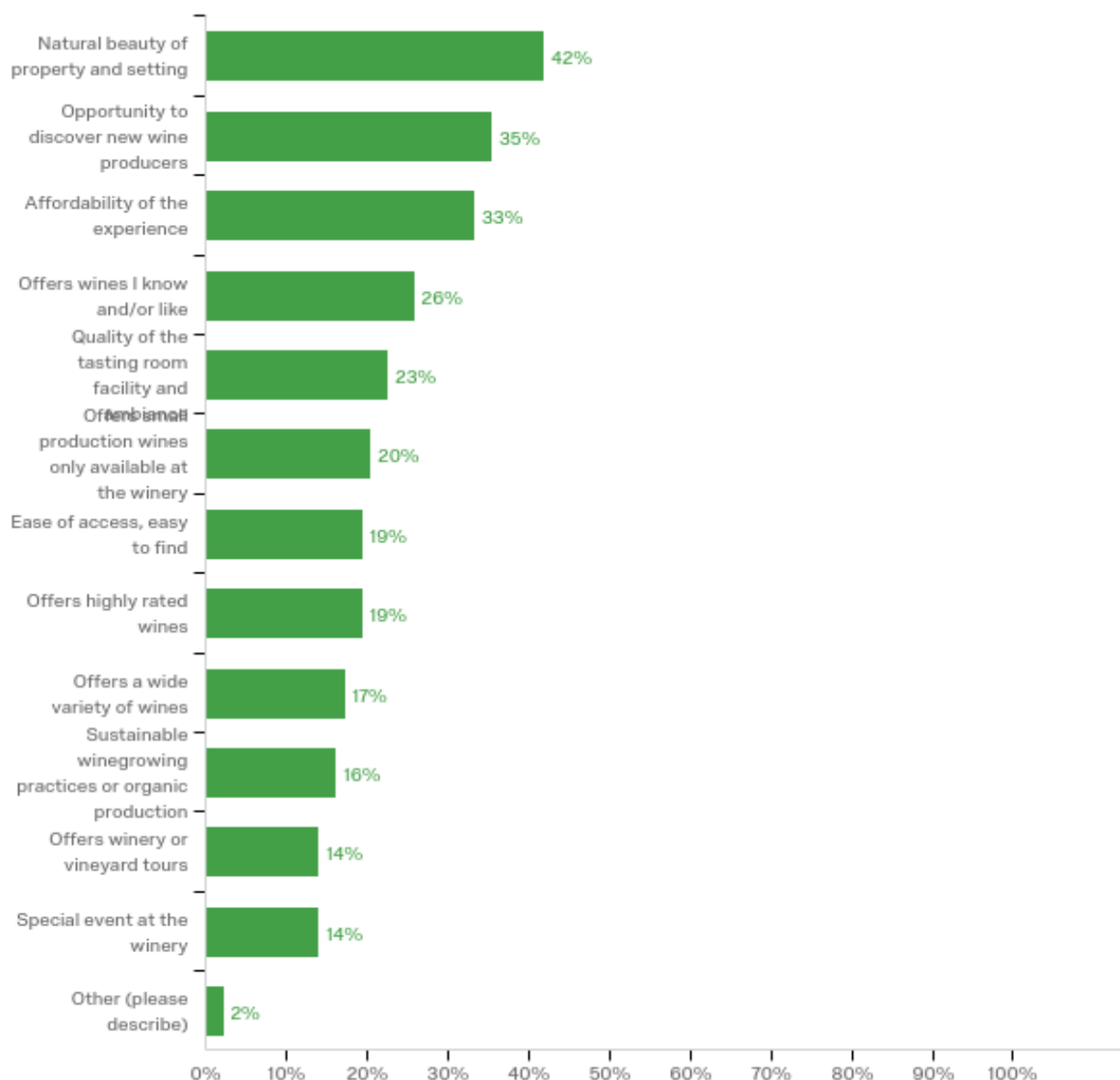
Barriers to Visiting (Non-Visitors/D)

QD1.1 - Do you enjoy visiting wineries and tasting rooms? (n=96)



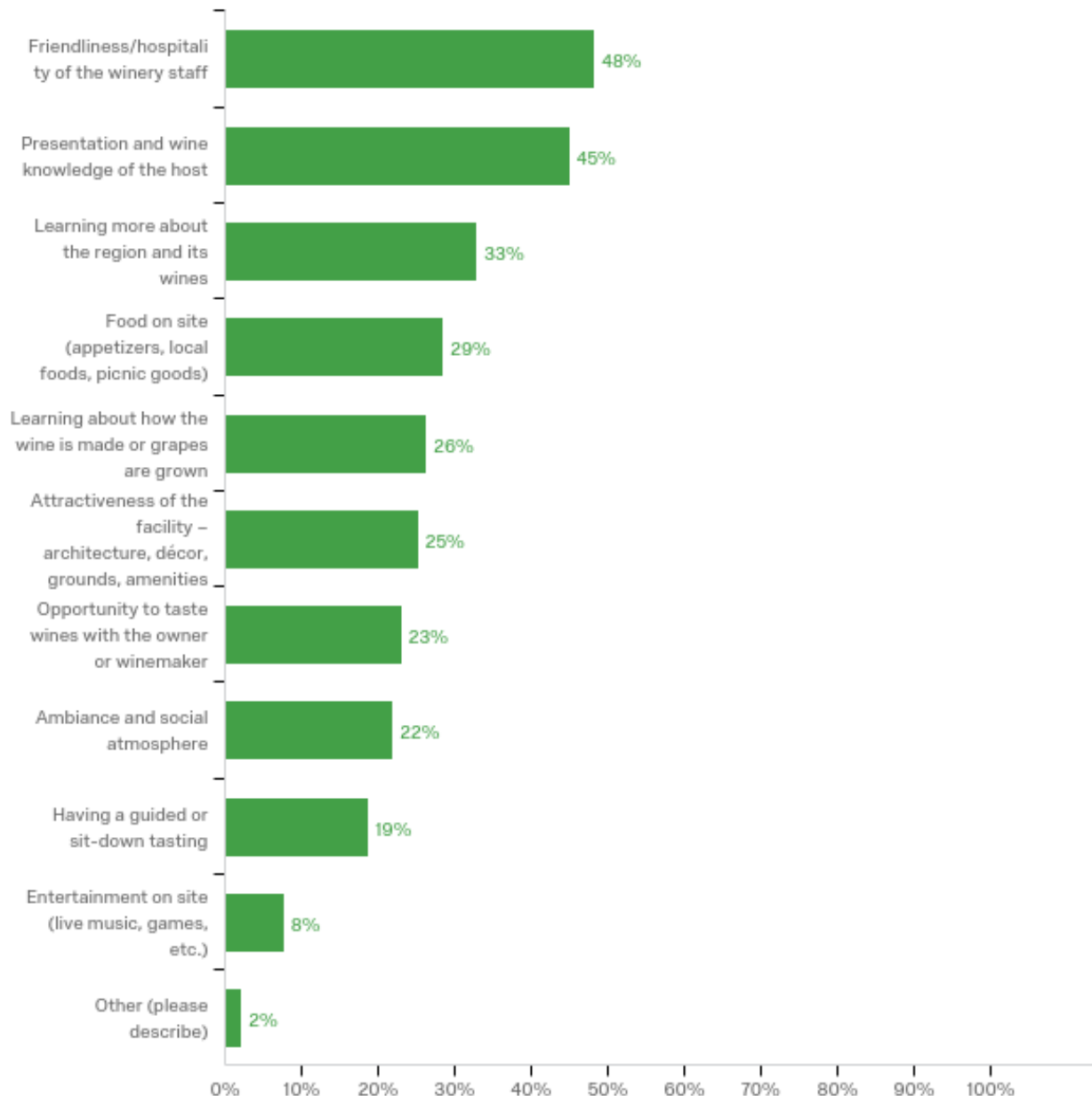
Answer	Count
Yes	90
Don't know/never tried	6
No	0
Total	96

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=93)



Answer	Count
Natural beauty of property and setting	39
Opportunity to discover new wine producers	33
Affordability of the experience	31
Offers wines I know and/or like	24
Quality of the tasting room facility and atmosphere	21
Offers small production wines only available at the winery	19
Ease of access, easy to find	18
Offers highly rated wines	18
Offers a wide variety of wines	16
Sustainable winegrowing practices or organic production	15
Offers winery or vineyard tours	13
Special event at the winery	13

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=91)



Answer	Count
Friendliness/hospitality of the winery staff	44
Presentation and wine knowledge of the host	41
Learning more about the region and its wines	30
Food on site (appetizers, local foods, picnic goods)	26
Learning about how the wine is made or grapes are grown	24
Attractiveness of the facility – architecture, décor, grounds, amenities	23
Opportunity to taste wines with the owner or winemaker	21
Ambiance and social atmosphere	20
Having a guided or sit-down tasting	17

Entertainment on site (live music, games, etc.)	7
Other (please describe)	2

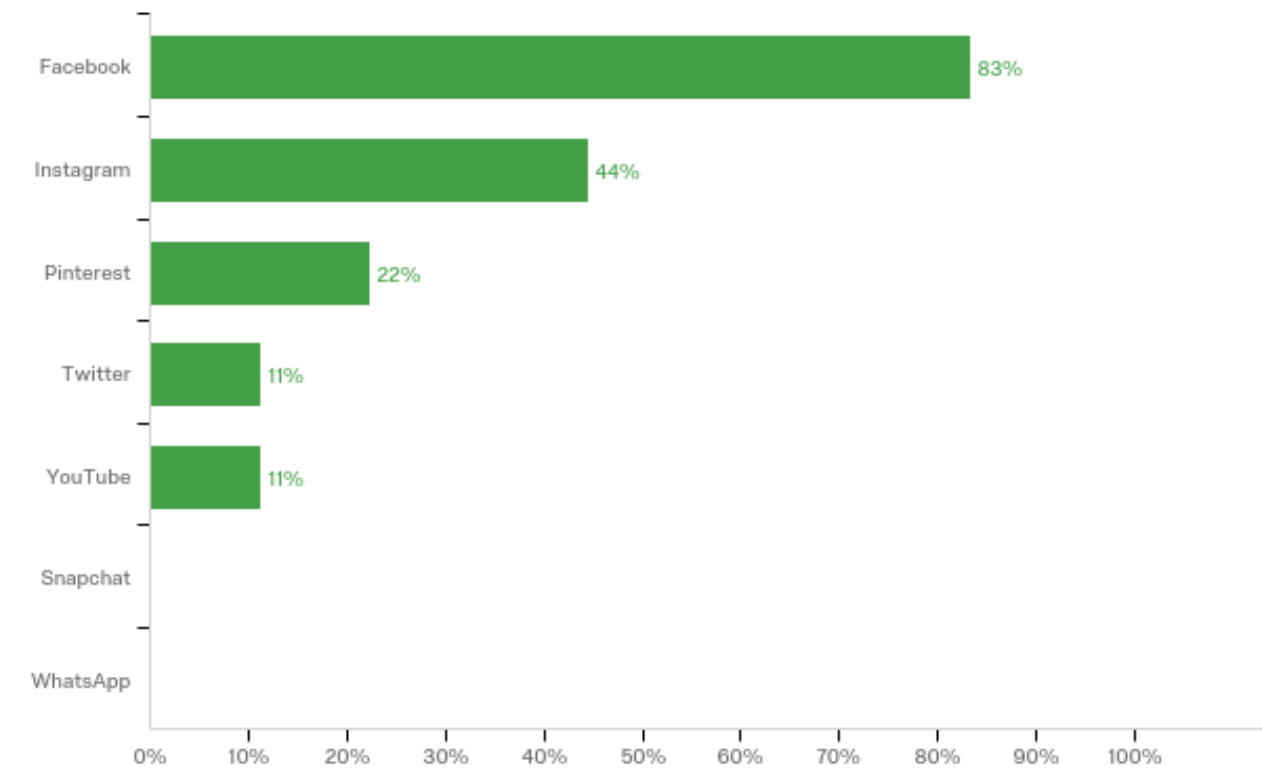
QD1.4 - What factors have prevented you from visiting the Rogue Valley? Select all that apply. (n=90)

Answer	%	Count
Too far to travel	58%	52
Lack of information – don't know much about the area	51%	46
Don't have enough free time	31%	28
Can't afford/too expensive	11%	10
Other (please describe)	7%	6
Companion/family prefers to do other things	7%	6
Lack of convenient or fairly priced transportation options to travel to the area from your home	6%	5
Lack of convenient or fairly priced transportation options for getting around the area once you've arrived	3%	3
Poor weather or climate	2%	2
Prefer to go somewhere else	2%	2
The area is too crowded	0%	0
Doesn't provide the kind of activities/experiences I am seeking	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=92)

Answer	%	Count
Word of mouth (recommendation from friend/family, local resident, etc.)	62%	57
Website(s) of an individual winery or wineries	36%	33
Free travel guidebook/brochure/map	33%	30
Wine publication, online or in print (e.g. Wine Spectator, Wine & Spirits)	30%	28
Restaurant, wine store, or retailer referral	24%	22
Websites of winery associations	21%	19
Mapping website (e.g. Google Maps)	21%	19
Social Media (e.g. Facebook, Instagram, etc.)	20%	18
Recommendation from a local restaurant	18%	17
Reviews website (e.g. Yelp, TripAdvisor)	18%	17
Visitors/welcome center	15%	14
Magazine/newspaper (not wine-specific)	14%	13
Road signs or billboards	13%	12
Concierge or other hotel/B&B staff	11%	10
Other travel-related website	10%	9
Commercial travel guidebook (e.g. Lonely Planet)	9%	8
Other (please specify)	9%	8
Traditional travel agency	2%	2
Online travel agency (e.g. Expedia, Priceline)	1%	1

QD1.5b - Which social media platform? (n=18)



Answer	Count
Facebook	15
Twitter	2
Instagram	8
YouTube	2
Snapchat	0
Pinterest	4
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	3%	3	14%	13	82%	74	90
Ease of traveling to the area from your home/starting point	6%	5	27%	24	67%	60	89
Affordability	4%	4	23%	21	73%	67	92
Quality of accommodations	2%	2	27%	25	71%	65	92
Ease of finding of accommodations	6%	5	29%	26	66%	59	90
Opportunity to attend a festival or special event	28%	25	51%	45	21%	19	89
Opportunity to view/ experience local arts, culture, and history	10%	9	36%	32	53%	47	88
Opportunity to visit parks, wilderness, and natural wonders	9%	8	42%	36	49%	42	86
Opportunity to experience farms or farm products (excluding wine)	32%	27	46%	39	22%	19	85
Opportunity to experience the area's wineries and wine culture	7%	6	27%	24	66%	59	89
High quality local cuisine/restaurants	8%	7	32%	28	60%	52	87
Area offers a wide variety of activities for my entire family	30%	25	46%	39	24%	20	84
Terrain/ geography/ climate is conducive to outdoor recreation activity	17%	14	46%	39	37%	31	84
Retail shopping	42%	35	48%	40	11%	9	84
Scenic beauty	1%	1	13%	12	86%	77	90

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	22%	588	51%	1388	21%	569	2%	62	0%	3	4%	96	2706
Umpqua Valley	4%	101	29%	762	29%	783	5%	144	0%	6	33%	865	2661
Willamette Valley	15%	404	43%	1155	24%	651	4%	108	0%	5	13%	351	2674
Columbia Gorge	3%	68	22%	570	28%	749	7%	192	0%	12	40%	1052	2643
Walla Walla Valley	8%	203	21%	563	18%	476	3%	88	0%	12	49%	1301	2643
Napa Valley	19%	516	43%	1145	21%	561	5%	143	0%	9	11%	305	2679
Paso Robles	7%	185	25%	670	20%	525	5%	120	0%	5	43%	1141	2646

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	24%	641	46%	1228	23%	621	3%	85	0%	9	4%	102	2686
Umpqua Valley	4%	97	17%	462	31%	823	12%	308	2%	50	34%	901	2641
Willamette Valley	11%	289	36%	956	29%	759	6%	147	0%	11	19%	496	2658
Columbia Gorge	5%	133	22%	575	26%	673	6%	169	1%	14	41%	1069	2633
Walla Walla Valley	5%	142	14%	375	17%	451	6%	149	1%	15	57%	1492	2624
Napa Valley	19%	504	32%	841	24%	640	8%	215	2%	46	15%	409	2655
Paso Robles	6%	148	18%	487	18%	472	6%	165	1%	27	51%	1335	2634

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	Rogue Valley		Willamette Valley		Walla Walla Valley		Total
The wines are good value for the money	61%	1845	25%	743	14%	422	3010
Different from other regions, a distinct style	52%	1311	31%	781	17%	418	2510
Prestigious or highly regarded by knowledgeable wine consumers	38%	1078	44%	1244	17%	483	2805
A reliable choice, even if you aren't familiar with the specific winery	48%	1640	36%	1229	15%	524	3393
Sustainable, organic, or ecologically beneficial growing practices	59%	1500	30%	768	12%	296	2564
I don't know enough about this region to select attributes	8%	205	29%	742	64%	1650	2597
Produces a wide variety of wines	56%	2032	29%	1047	15%	554	3633
Many small artisanal producers	55%	1940	30%	1052	15%	533	3525

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

Question	Not at all associated		Somewhat associated		Strongly associated		Total
Pinot Noir	11%	244	42%	966	48%	1113	2323
Chardonnay	13%	267	55%	1166	33%	691	2124
Riesling	34%	617	50%	895	16%	285	1797
Pinot Gris or Pinot Grigio	12%	258	47%	981	40%	833	2072
Cabernet Sauvignon	8%	184	41%	922	50%	1128	2234
Tempranillo	4%	87	24%	559	72%	1640	2286
Syrah	4%	93	34%	751	62%	1390	2234
Red Blends	2%	45	26%	604	73%	1719	2368
Viognier	4%	94	33%	731	63%	1384	2209
Sparkling	45%	765	48%	825	7%	115	1705
Gewurztraminer	49%	818	42%	707	9%	142	1667
Zinfandel	26%	505	49%	959	25%	490	1954

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)	51%	1315	30%	765	12%	302	7%	172	1%	17	2571
Washington (all regions)	8%	199	23%	569	22%	562	38%	948	9%	238	2516
Willamette Valley	9%	230	23%	591	27%	689	33%	845	7%	168	2523
Rogue Valley	45%	1179	30%	790	13%	340	9%	237	2%	47	2593
Umpqua Valley	4%	96	13%	329	25%	616	43%	1076	15%	377	2494
Columbia Gorge	2%	58	10%	247	20%	505	49%	1204	19%	468	2482
Walla Walla Valley	2%	54	9%	215	15%	369	48%	1182	27%	664	2484
Napa Valley	7%	189	20%	493	23%	573	43%	1077	8%	195	2527
Sonoma County	7%	169	19%	488	22%	553	43%	1069	9%	227	2506