



PROFILE OF WINE TOURISTS TO WILLAMETTE VALLEY

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Detailed Report of Findings prepared for the Willamette Valley Wineries Association by

Destination Analysts

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RESEARCH OVERVIEW

This report presents the findings of the Willamette Valley Wine Tourist Visitor Profile Study conducted by Destination Analysts, Inc. on behalf of the Willamette Valley Wineries Association (WVWA). The primary focus of this research was to support the WVWA in developing a deeper, comprehensive understanding of the current segments and audiences the Willamette Valley is attracting, as well as garner insights about the Willamette Valley destination brand in order to ultimately grow the positive impact of tourism to the AVA.









Images of Willamette Valley. Courtesy of Instagram.com/wvwines.

RESEARCH OBJECTIVES

This primary focus of this research—to develop an understanding of wine tourists to the Willamette Valley and garner insights about the Willamette Valley destination brand—was supported by several other objectives. This research study was specifically designed to:

- Develop profiles of Willamette Valley's wine tourists
- Evaluate what wine tourists seek from the Willamette Valley visitor experience
- Provide detail on trip behaviors
- Identify elements of the Willamette Valley visitor experience that successful in inspiring tourism, as well as elements that can be added and improved
- Identify what will motivate past visitors to return
- Measure the Willamette Valley as a leisure travel destination in terms of destination awareness, familiarity and appeal









Images of Willamette Valley. Courtesy of Instagram.com/wvwines.



RESEARCH METHODOLOGY

This extensive research study consisted of a multi-faceted approach. The three quantitative research components were the:

- Willamette Valley Visitor Intercept Survey
- Willamette Valley Customer Survey
- Survey of Wine Tourists in Key Markets

Findings presented within this report are the combined findings from the Willamette Valley Visitor Intercept Survey and the Willamette Valley Customer Survey. As the Survey of Wine Tourists in Key Markets is currently in data collection, findings from this research component will be added and an updated report will be delivered to the WVWA.









Images of Willamette Valley. Courtesy of Instagram.com/wvwines.

RESEARCH METHODOLOGY (CONTINUED)

Willamette Valley Visitor Intercept Survey

This research component consisted of an in-person visitor intercept survey conducted at various wineries and vineyards throughout the North, Central and South regions of the Willamette Valley. To be considered a visitor and thus complete the full survey, respondents must have tasted and/or purchased wine during their visit within the Willamette Valley. In total, 303 completed visitor intercept surveys were collected in this research effort from August 2nd – August 5th, 2018. Destination Analysts' field research team surveyed throughout the Willamette Valley and administered the questionnaire at the following 13 locations:

- Adelsheim Vineyard
- Argyle Tasting House
- Bethel Heights Vineyard
- Bjornson Vineyard
- Furioso Vineyards
- Iris Vineyards
- Plum Hill Vineyards

- Remy Wines
- Silvan Ridge Winery
- Sokol Blosser Winery
- Willamette Valley Vineyards
- Winter's Hill Estate
- Youngberg Hill



Images of Destination Analysts' field research team surveying Willamette Valley visitors in-market.

RESEARCH METHODOLOGY (CONTINUED)

Willamette Valley Customer Survey

This online survey was distributed via an email invitation to the customer email lists of Willamette Valley wineries, businesses and organizations. The primary purpose of this survey was to supplement the data set of Willamette Valley wine tourists. In order to complete the customer survey, respondents must have traveled to or within the Willamette Valley in the past 12 months and tasted and/or purchased Willamette Valley wine. In total, 7,781 completed surveys were collected in this research effort from approximately October 20th through December 20th, 2018. These surveys were collected from the following 36 Willamette Valley wineries, businesses and organizations:

- A Blooming HIII Vineyard
- A to Z Wineworks
- A' Tuscan Estate Bed & Breakfast
- Adelsheim Vineyard
- Alexana Winery
- Anam Cara Cellars
- Apolloni Vineyards
- Carlton Winemakers Studio
- Coeur de Terre Vineyard
- Cristom Vineyards
- Dion Vineyard
- Domaine Divio
- Elizabeth Chambers Cellar
- Fairsing Vineyard
- Firesteed
- Furioso Vineyards

- Hyland Estates
- Le Puy A Wine Valley Inn
- Left Coast Estate
- REX HILL
- Ruddick/Wood
- Silvan Ridge Winery
- Sokol Blosser Winery
- Sweet Cheeks Winery & Vineyard
- Torii Mor Winery
- Utopia Vineyards
- Van Duzer
- VIDON Vineyard
- White Rose Estate
- Willamette Valley Vineyards
- Willamette Valley Wineries Association
- Winderlea Vineyard & Winery
- Yamhill Valley Vineyards

DEFINITIONS USED IN THIS REPORT

Findings from this research study are presented in visitor profile summaries, data charts, data tables and written analysis. The following key terms are used within this report and are defined following:

- Wine Tourist or Visitor Survey respondents who visited the Willamette Valley in the past 12 months.
- Oregon Resident Wine tourists who live within the state of Oregon.
- Out-of-State Resident Wine tourists who live outside the state of Oregon.
- International Resident Wine tourists who live outside the United States.
- Willamette Valley Resident Wine tourists who live within the Willamette Valley.
- **Day Tripper** Wine tourists who did not stay overnight within the Willamette Valley during their most recent trip.



Images of Willamette Valley. Courtesy of Instagram.com/wvwines.

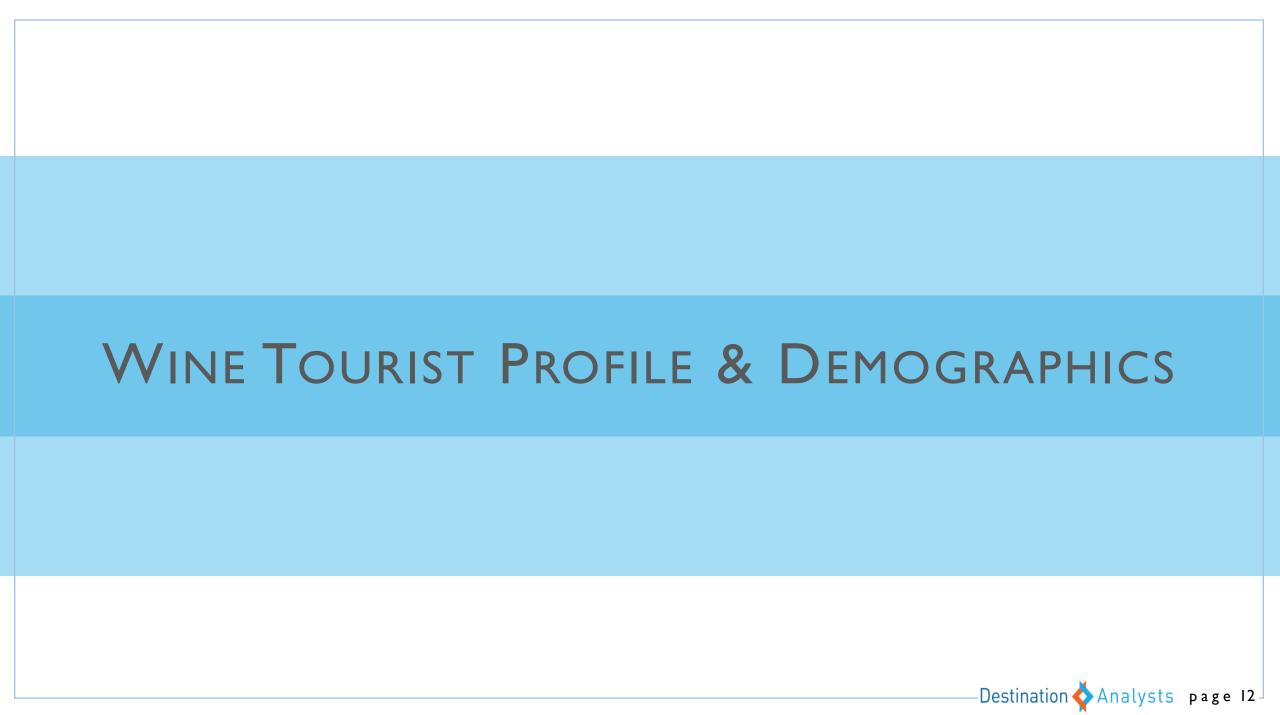
DEFINITIONS USED IN THIS REPORT (CONTINUED)

- Hotel Guest Wine tourists who stayed overnight in a Willamette Valley hotel during their most recent trip.
- **Affluent Visitor** Wine tourists who reported an annual household income of \$140K or more.
- Outdoor Enthusiast Wine tourists who participated in land or water-based outdoor recreation during their most recent trip.
- **Special Event Attendee** Wine tourists who attended a festival or special event during their most recent trip and said they would be likely to return to the Willamette Valley for another special event.
- **Beer Lover –** Wine tourists who visited a brewery or distillery during their most recent trip.



Images of Willamette Valley. Courtesy of Instagram.com/wvwines.





EXECUTIVE SUMMARY – THE WINE TOURIST PROFILE & DEMOGRAPHICS

- Willamette Valley is drawing similar numbers of males and females, with a slight female skew. In total 51.7 percent of all respondents were female while 46.6 percent were male.
- The Willamette Valley wine tourist is 51.5 years of age on average. Half of visiting wine tourists surveyed were 55 years of age or older (50.2%) while three-in-ten (28.9%) were between the ages of 21 and 44.
- Willamette Valley wine tourists are affluent. The average visitor surveyed reported having an annual household income of \$113,435.
- In total, 85.5 percent of wine tourists identified as Caucasian while 6.6 percent identified as a non-Caucasian ethnicity. The largest non-Caucasian visitor groups were Hispanic/Latino (2.3%) and Asian/Pacific Islander (2.2%).
- **The Willamette Valley wine tourist is educated.** In total, 77.9 percent have a Bachelor's degree including 36.6 percent who have completed graduate school.
- Willamette Valley wine tourists are likely to be married. Eight-in-ten wine tourists are married/partnered while 15.7 percent are single. In total, 15.9 percent of respondents have children under the age of 18 while half (49.1%) have adult children age 21 or older.
- In total, 4.0 percent of wine tourists identify as LGBTQ.

EXECUTIVE SUMMARY – THE WINE TOURIST PROFILE & DEMOGRAPHICS

- Willamette Valley wine tourists are frequent consumers of wine. Nearly eight-in-ten respondents said that on average they drink wine at least a few times a week including 28.9 percent who drink wine every day. Out-of-state wine tourists surveyed were more likely than Oregon residents to say they drink wine every day (32.7% vs. 24.3%, respectively).
- In general, Willamette Valley wine tourists purchase less expensive bottles of wine with higher frequency (weekly or monthly) and purchase more expensive bottles less often (several times per year or less than several times per year). Approximately a quarter of all respondents said they never purchase bottles of wine that cost \$50 or more (24.2%).
- However, wine purchasing habits differ between Oregon residents and out-of-state wine tourists. Out-of-state wine tourists are more likely to purchase moderately priced bottles (between \$20-\$29.99) on a monthly basis (32.1% vs. 24.7%) while Oregon residents are more likely to purchase bottles at this price point less frequently, making these purchases several times per year on average (45.6% vs. 37.9%). Out-of-state wine tourists are also more likely to purchase expensive bottles of wine (priced \$50 or more) several times per year (33.0% vs. 27.5%) while Oregon residents are more likely to never purchase bottles of wine at this price (30.4% vs. 19.2%).

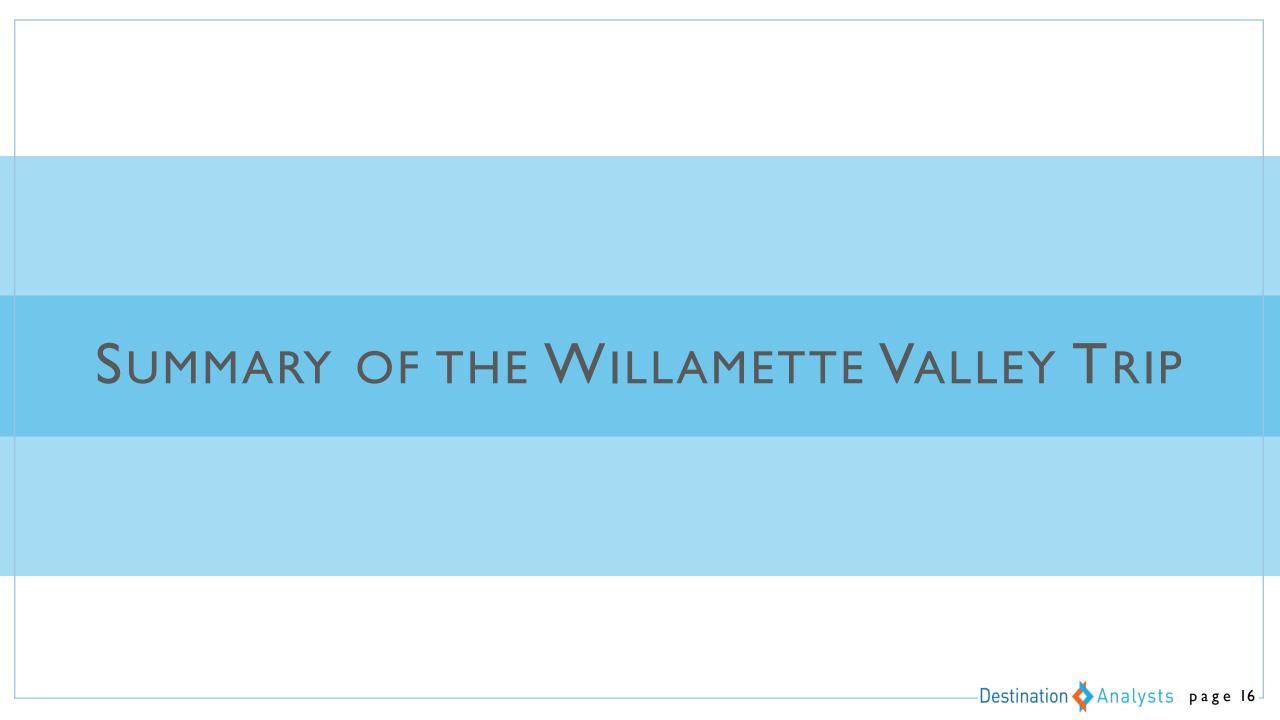




EXECUTIVE SUMMARY – THE WINE TOURIST PROFILE & DEMOGRAPHICS

- Nearly six-in-ten wine tourists were Willamette Valley wine club members prior to their visit to the region (58.1%). This is primarily driven by Oregon residents—nearly three-quarters of in-state visitors were already wine club members (74.0%), compared to just under four-in-ten (38.6%) of out-of-state visitors.
- Nearly a quarter of all wine tourists to Willamette Valley joined a Willamette Valley wine club on their most recent trip to the area (23.9%). Although Oregon residents were more likely to have already been a member of a Willamette Valley wine club prior, out-of-state visitors were much more likely to have joined a wine club on their most recent trip (35.8% vs. 14.3% for Oregon residents).
- Over half of all wine tourists surveyed said they are "likely" or "very likely" to join a Willamette Valley wine club in the future. Likelihood to join a wine club in Willamette Valley is higher amongst in-state wine tourists (60.3% vs. 50.1% for out-of-state visitors).





EXECUTIVE SUMMARY — THE WILLAMETTE VALLEY TRIP

- The typical Willamette Valley wine tourist has taken 3.2 trips to Willamette Valley to taste and/or buy the region's wine. Repeat visitation amongst out-of-state residents is notable with over a third of this group stating they have taken multiple trips to the Willamette Valley to buy or taste wine (34.9%).
- Although wine tourists visit the Willamette Valley throughout the year, peak visitation appears to occur
 between the months of July and October. Over 40 percent of all wine tourists surveyed made a trip to the
 Willamette Valley during these months. Visitation is lowest during the winter months of December and
 January across all visitor segments.
- Four-in-ten wine tourists stayed overnight in the Willamette Valley during their trip (40.9%). Hotels (39.9%) and vacation home rentals (20.5%) were the most common places of stay amongst overnight wine tourists surveyed.



• Wine tourists who were not staying overnight in the Willamette Valley during their visit most often day-tripped from Portland (31.1%). Following Portland, just under 10 percent of day trippers surveyed made their trip to the Willamette Valley from Eugene (8.8%) or Beaverton (5.7%). Out-of-state visitors from this group were most likely to be day-tripping from Portland (46.5%) or Vancouver, WA (9.0%).

EXECUTIVE SUMMARY — THE WILLAMETTE VALLEY TRIP

- The average wine tourist travel party to Willamette Valley was comprised of 3.5 people. Less than 10 percent (7.4%) were traveling with children under the age of 18. Although Oregon residents and out-of-state visitors had similar travel party sizes (3.6 vs. 3.3, respectively) in-state visitors were more likely to be traveling with younger adults aged 18-34 (33.8% vs. 24.9% for out-of-state residents) while out-of-state visitors were more likely to have older travelers in their party aged 55 or older (81.3% vs. 74.2%).
- Nearly all wine tourists were in the Willamette Valley for leisure, although in-state residents were much more likely to describe their trip as a leisure day-trip while out-of-state visitors were more likely to say they were in the region on vacation or a weekend getaway. Out-of-state visitors and non-wine club members were the most likely segments to be in Willamette Valley on business, a conference or government travel (3.4% and 3.8%, respectively).
- The typical wine tourist surveyed spent 2.4 days and 1.3 nights in the Willamette Valley on their most recent trip.
- Wine tourists spent an average of \$605.70 per travel party within the Willamette Valley on their trip. This spending covered approximately 2.3 people so it is estimated that the typical wine tourist represents \$264.35 in daily in-market spending to Willamette Valley. These visitors typically spent \$193.36 on wine to take or ship home and \$55.50 on wine to consume during their trip.



EXECUTIVE SUMMARY — THE WILLAMETTE VALLEY TRIP





- On average, wine tourists visited 3.7 wineries and 0.9 tasting rooms during their time in the Willamette Valley. A majority of respondents visited at least one winery during their trip (98.0%) while four-in-ten (40.8%) went to at least one stand-alone tasting room.
- Wine tourists purchased 6.2 bottles of wine at the wineries or stand-alone tasting rooms they visited on average.

 North and central valley visitors purchased more wine bottles on their trip compared to south valley visitors (6.7 and 6.8 vs. 5.3, respectively). Just 5.9 percent of wine tourists did NOT purchase wine during their visit to Willamette Valley—this was most typically attributed this to their wine club membership since they anticipated having wine shipped to them later (19.0%).
- Wine tourists most often visited Dundee Hills (60.5%), McMinnville (39.8%) and Yamhill-Carlton (38.4%) during their Willamette Valley trip. Non-wine club members were more likely to have visited McMinnville (46.9% vs. 37.8%) and Portland (32.0% vs. 20.6%) compared to wine club members.
- Just under a quarter of all wine tourists surveyed visited other destinations outside the Willamette Valley on their trip (22.0%). These travelers most often visited Willamette Valley in conjunction with regional outdoor attractions such as state/national parks (17.2%) and Cannon Beach (15.4%).

EXECUTIVE SUMMARY - THE WILLAMETTE VALLEY TRIP

- Wine tourists typically participated in 2.4 different activities during their trip to the Willamette Valley—the top amongst these being wine tasting (85.5%), dining in restaurants (59.0%), winery tours (29.2%) and shopping (21.7%).
- The most utilized mode of transportation in the Willamette Valley was a personal automobile (73.7%) followed by a rental car (23.9%). Out-of-state visitors were more likely than Oregon residents to walk and/or use a ride sharing service to travel around Willamette Valley during their trip.



EXECUTIVE SUMMARY - THE WILLAMETTE VALLEY TRIP

Visitors age 35 to 44 had the largest travel party sizes and also spent the most on wine to consume on their trip/take home. The chart at right maps the average travel party sizes for visitors of various age categories against the dollar amount spent on wine in-market. As the age of the visitor increases their respective travel party sizes and amount spent on wine decreases slightly.

In-Market Wine Spend / Travel Party Size / Visitor Age

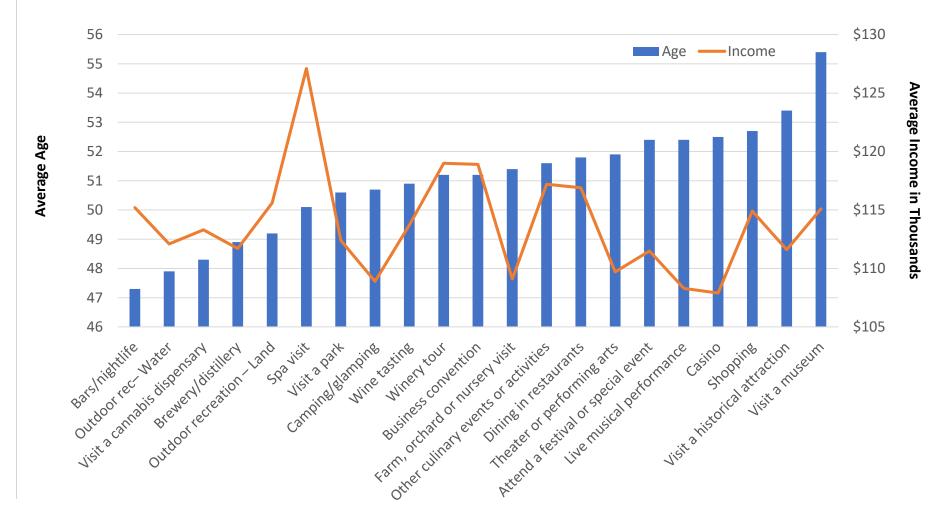


EXECUTIVE SUMMARY - THE WILLAMETTE VALLEY TRIP

Participation in certain activities within the Willamette Valley varied by traveler age and income. The chart at right maps the average age of visitors and average household incomes against the activities these travelers participated in within the region. The chart is ordered from youngest relative age on the left to oldest on the right. The orange line superimposed on the chart shows the average household income of visitors who participated in each activity.

Older travelers were more likely to have visited museums and historical attractions during their time in the area while younger travelers were more likely to visit a cannabis dispensary, participate in water-based outdoor recreation and go to bars. Additionally, higher income visitors were more likely to visit a spa, go on a winery tour and attend a business convention. Meanwhile lower income visitors were more likely to camp, visit a farm, see a live musical performance or go to a casino.

Visitor Age / Annual Household Income / Activity In-Market



MARKETING THE WILLAMETTE VALLEY -Destination 💠 Analysts 🏻 page 23 🛭

- Approximately 1.5 percent of wine tourists to Willamette Valley are international residents. The top international markets represented in the survey sample were Canada (64.7%), Australia (5.9%), New Zealand (4.7%) and the United Kingdom (3.5%). (However, please note that the components of this research were only available in English.)
- Over half of domestic Willamette Valley wine tourists reside outside of Oregon (53.8%). The tops states observed in the survey sample, outside Oregon, were Washington (8.6%), California (6.8%), Texas (3.4%) and Florida (3.0%). According to the National Health Institute's *Apparent Per Capita Alcohol Consumption: National, State, and Regional Trends* report, California, Florida, New York, Texas and Illinois are the top five states with the most wine consumption (by volume). Opportunities to grow visitation from these high volume wine consuming states should be considered.
- Travel distance to and from the Willamette Valley was the top reason wine tourists cited as their deterrent for returning. The few wine tourists surveyed who said they were unlikely to return were asked, in an open-ended format, to describe why they were unlikely to do so. Beyond living too far from Willamette Valley, three-in-ten of this group felt that this was intended to be a one-time trip and/or had no future plans to return (29.2%) and 16.7 percent said traveling for wine was not a priority for them. Additionally, 12.5 percent of this group said they disliked a certain aspect of the area and therefore were unlikely to return.



- The quality/variety of wine available in the Willamette Valley, its scenic beauty and wine tasting are the primary drivers motivating visitation to the region. Beyond these, the next most cited trip motivators were how easily accessible the region is (8.6%), concentration of wineries in the area (8.4%) and wine club members visiting or picking up wine at wineries (7.3%). Interestingly, out-of-state visitors were more likely to say pinot noir specifically motivated their trip to the region (11.8% vs. 2.6% of Oregon residents).
- reason wine tourists were inspired to make another trip to the region. When asked what inspired this most recent trip to the area, over half of respondents (55.1%) said they had been to Willamette Valley previously. Opinions of friends/family directly (24.4%), a wine event (18.4%), information from a wine club (16.0%) and wine related magazines (8.8%) were the next most cited Willamette Valley trip inspiration sources. Additionally, approximately 5.0 percent of all wine tourists said they were inspired to visit the region because of a wine store (5.9%), tourism website (5.0%), wine blogs/bloggers (4.7%) and/or through the opinions of friends/relatives via social media (4.3%).



- The average wine tourist used 1.7 different resources to select wineries and tasting rooms to visit within the Willamette Valley—top amongst these were word of mouth (43.4%), free winery maps (22.6%) and/or the website of an individual winery (22.2%). Additionally, over one-in-ten wine tourists turned to the Willamette Valley Wineries Guides (15.2%), road signs (14.2%), Oregon Wine Touring Guide (13.2%) and mapping websites (12.3%) as resources for selecting wineries/tasting rooms.
- Word-of-mouth recommendations (55.1%) and scenic views (46.4%) were the most important factors to
 wine tourists' decision to visit specific wineries/tasting rooms. Word-of-mouth recommendations and
 winery tours were more likely to be considered important factors to out-of-state visitors while scenic views,
 accessibility and special events were more important to Oregon residents.
- Tasting and/or buying Willamette Valley wines was considered the most important factor in visiting the region's wineries. When asked which of the three experiences was considered the most important to the destination decision process, over half (57.4%) of all wine tourists surveyed said buying/tasting Willamette Valley wines. In comparison, 34.3 percent felt that experiencing the area's ambiance was most important to their destination decision process while 8.2 percent said learning about Willamette Valley wines was most important.





- Virtually all Willamette Valley wine tourists would be likely to return to the area. In total, 97.9 percent said they would be "likely" (7.4%) or "very likely" (90.5%) to return to the region.
- Willamette Valley wine tourists feel strongly that the region provides a highly satisfactory visitor experience and produces quality wines. Presented with a list of statements, wine tourists were asked to rate their level of agreement on a 10-point scale. The highest levels of agreement were that wine tourists were "very likely to recommend a trip to the Willamette Valley" (9.4) and they are also "very likely to recommend Willamette Valley wines to others" (9.3). Also speaking to the quality of Willamette Valley wines, wine tourists rated their agreement with being "much more likely to select Willamette Valley wines in restaurants, bars or retail stores" as an 8.3 out of 10. There was comparatively less agreement amongst respondents for "a special event or festival would motivate me to return to the Willamette Valley" (7.8).







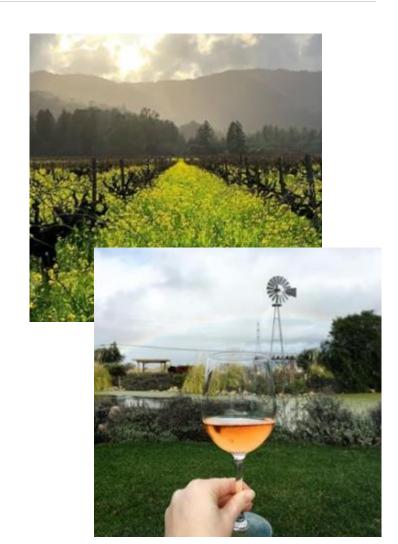
EXECUTIVE SUMMARY-WILLAMETTE VALLEY'S COMPETITIVE POSITION

- Walla Walla was the most commonly desired competitive wine region compared to Napa Valley and Sonoma County amongst Willamette Valley wine tourists. Respondents were told to think of the West Coast wine regions of Walla Walla, Napa Valley and Sonoma County and asked which they would most like to visit. In total, 42.4 percent of all wine tourists surveyed said Walla Walla, WA was the wine region they would most like to visit followed distantly by Napa Valley (26.3%) and Sonoma County (24.3%). Although Walla Walla topped the list for both Oregon residents and out-of-state visitors, in-state wine tourists were more likely than their counterparts to select this destination as their preferred wine region (49.9% vs. 36.3%, respectively).
- Wine tourists who selected Walla Walla as their preferred west coast wine region (over Napa Valley and Sonoma) were more likely to reside in Oregon (54.2%) or Washington (11.8%). They also spent the least amount in-market on their Willamette Valley trip averaging \$225.70 per person. They were the most likely group to have already been a Willamette Valley wine club member prior to their most recent trip to the region (66.2%) and are heavy wine consumers, with just over three-in-ten stating they drink wine everyday (31.8%). They are the oldest group, comparatively, with an average age of 52.5 but have the lowest annual house hold income (\$111,350).



EXECUTIVE SUMMARY-WILLAMETTE VALLEY'S COMPETITIVE POSITION

- Wine tourists who selected Napa Valley (over Walla Walla and Sonoma), visited the least amount of wineries within Willamette Valley on their most recent trip, averaging 3.4 and purchased the least amount of bottles of wine (5.7, on average). They were the least likely group to have already been a member of a Willamette Valley wine club (50.3%) and the least likely to say they consumer wine everyday (22.9%). They are also the youngest group with an average age of 49.9 years.
- Wine tourists who selected Sonoma County (over Walla Walla and Napa Valley), were more likely to reside in California (11.3%) or Texas (4.8%). They were the largest in-market spenders averaging \$283.81 per person. They visited the most amount of wineries during their Willamette Valley trip (4.2) and purchased the most bottles of wine on average (6.6). They were more likely to turn to the website of an individual winery (26.3%), Willamette Valley Wineries Guides (17.9%) and the official website of Willamette Valley Winery Association (10.1%) to select wineries/tasting rooms to visit in the region. They were also the most likely group to have joined a Willamette Valley wine club on their most recent trip (27.1%) but the least likely to say that a special event or festival would motivate them to return to the Willamette Valley (58.2%). This group also had the highest reported annual household income (\$118, 864).



EXECUTIVE SUMMARY-WILLAMETTE VALLEY'S COMPETITIVE POSITION



- Compared to Walla Walla, Willamette Valley's easily accessible location was considered the top attribute that made the area more attractive (46.1%), distantly followed by pinot noir (14.1%) and scenic beauty (13.0%).
- Compared to Napa Valley and Sonoma County, Willamette Valley is seen as superior for being less crowded, less expensive and less commercialized.
- A notable proportion of wine tourists felt that there was nothing that made Willamette Valley less attractive than the competing wine regions tested.
- Amongst the tangible points of differentiation cited, compared to Walla Walla, Willamette Valley does not have the preferred wine varietals. Furthermore, these wine tourists "would like a new experience" from Willamette Valley.
- Superior attributes Napa Valley and Sonoma County are felt to have to Willamette Valley are more amenities and better weather.

COMPARISON OF VISITOR TYPES -Destination 💠 Analysts 🏻 page 32 🛭

EXECUTIVE SUMMARY - COMPARISON OF VISITOR TYPES (BY PLACE OF RESIDENCE)

Willamette Valley, Oregon, Out-of-State and International Residents

- Oregon residents were the likeliest to already be members of a wine club prior to their Willamette Valley visit (74.0%). Meanwhile, out-of-state residents were the likeliest to join a wine club during their trip (35.8%).
- On average, out-of-state residents visited the most wineries (5.0) and purchased the most bottles of wine (7.6) during their Willamette Valley trip.
- On average, international residents spent the most per person per day (\$441.53), while in-state residents spent the least per day (\$125.68) during their most recent Willamette Valley visit.
- International residents were the likeliest segment to go shopping (35.0%) and participate in land-based outdoor recreational activities (30.0%) during their trip, while out-of-state residents were the likeliest to go on a winery tour (44.1%).
- International (20.0%) and out-of-state (21.0%) residents were the likeliest to visit a brewery or distillery during their Willamette Valley trip. Amongst the resident visitor segments, international residents were also the likeliest to visit a park (21.7%).



Images of Willamette Valley. Courtesy of Instagram.com/wvwines.

EXECUTIVE SUMMARY – COMPARISON OF VISITOR TYPES (BY PLACE OF RESIDENCE)

Willamette Valley, Oregon, Out-of-State and International Residents

- International residents were also the likeliest segment to be inspired to visit by a wine store or retailer (13.3%) and wine-related magazine (13.3%), while out-of-state residents were the likeliest to be inspired by direct opinions of friends and relatives (28.4%). A wine event (24.0%) and information from a wine club (21.7%) were the likeliest sources of inspiration for Oregon residents.
- Out-of-state residents reported the highest annual household income (\$120,326), while international residents are the likeliest to be married or partnered (84.9%).



Images of Willamette Valley. Courtesy of Instagram.com/wvwines.

EXECUTIVE SUMMARY – COMPARISON OF VISITOR TYPES (BY PLACE OF STAY)

Paid Lodging Guests and Day-Trippers

- While day-trippers were much more likely to be Oregon residents (81.4% vs. 19.1%), paid lodging guests were more likely to reside in the key feeder states of Washington (12.8% vs. 5.3%), California (9.1% vs. 2.2%), Texas (5.9% vs. 1.0%) and Florida (4.9% vs. 0.9%).
- Paid lodging guests were more likely than day trippers to join a wine club during their Willamette Valley trip (39.8% vs. 14.7%), visit more wineries (5.6 vs. 2.7), purchase more wine bottles (6.6 vs. 5.4) and spend more per person, per day (\$458.25 vs. \$139.40).
- In general, paid lodging guests were more likely than day trippers to participate in the Willamette Valley activities tested during their trip. In particular, these visitors were likelier to visit a brewery or distillery (22.9% vs. 9.8%) and experience Willamette Valley's bars and nightlife (19.0% vs. 4.2%).
- Although day trippers were more likely to be inspired to visit the Willamette Valley due to a wine event (22.2% vs. 12.3%) and/or information from a wine club (20.6% vs. 9.0%), top sources of information for paid lodging guests were wine-related magazines (15.6% vs. 5.2%) and tourism websites (9.1% vs. 2.9%).
- Paid lodging guests reported a higher annual household income (\$121,893 vs. \$108,137) and were more likely to be married or partnered (84.1% vs. 75.9%) compared to day trippers.

EXECUTIVE SUMMARY - COMPARISON OF VISITOR TYPES (BY MOST IMPORTANT FACTOR IN THE DECISION TO VISIT WILLAMETTE VALLEY)

Wine Tasters/Buyers, Atmosphere Experiencers and Willamette Valley Wine Learners

- Of these three visitor segments, those who considered learning about Willamette Valley wines to be the most important factor in their decision to visit were the likeliest to stay overnight in the destination (49.9%).
- Those who came specifically to taste or buy wine were already wine club members prior to their most recent Willamette Valley visit (59.7%), while those who came to learn about the region's wine were the likeliest to join a wine club during their trip (31.1%).
- Visitors who came to learn about Willamette Valley wines visited the most wineries (4.5), purchased the most bottles (6.9) on average and spent the most per person, per day (\$321.20).
- Those who visited to learn about the Valley's wines were also the likeliest segment to:
 - o Go on a winery tour (41.1%)
 - Shopping (25.6%)
 - Visit a brewery or distillery (18.2%)
 - Engage in land-based outdoor recreation (15.3%)
 - Report that the direct opinions from friends and relatives (30.5%) and wine-related magazines (14.2%)
 inspired them to visit the Willamette Valley



Images of Willamette Valley. Courtesy of Instagram.com/wwwines.

EXECUTIVE SUMMARY - COMPARISON OF VISITOR TYPES (BY GENERATION)

Millennials, Gen X and Boomer Wine Tourists

- Boomers were the largest in-market spenders averaging \$258.63 per person (compared to \$249.86 for Gen X and \$192.58 for Millennials). However, Gen X wine tourists spent the most comparatively on wine to take home (\$196 vs. \$179 for Boomers and \$138 for Millennials) and wine to consume on their trip (\$60 vs. \$55 for Boomers and \$41 for Millennials).
- Boomers and Gen X wine tourists purchased the most bottles of wine during their Willamette Valley trip averaging 6.6 and 6.5, respectively compared to Millennials who purchased 4.7 bottles, on average.
- Boomers were also the most likely segment to have visited other destinations outside Willamette Valley on their trip (27.2% vs. 17.7% for Gen X and 14.2% for Millennials).
- Boomers were likelier to turn to free winery maps/guides (28.2%), Willamette Valley Wineries Guides (20.6%), wine publications (12.5%) and the Oregon Wine Touring Guide (17.7%) to help them select wineries within the Willamette Valley to visit during their trip compared to the other traveling generations. In contrast, Millennials were more likely to turn to mapping websites (16.6%) and social media (14.1%).
- Amongst the activities tested, Boomers were more likely to dine in restaurants (63.0%) and shop (24.9%) during their Willamette Valley trip. Meanwhile, Millennials were more likely to have visited a brewery/distillery (19.9%) and go to bars (14.8%).
- Gen X and Boomer wine tourists had the largest travel parties (3.6 and 3.5 people, respectively), but Gen X was the most likely segment to have children under the age of 18 in their travel group (12.6%).

EXECUTIVE SUMMARY - COMPARISON OF VISITOR TYPES (BY REGION OF THE AVA VISITED)

North, Central and South Valley Visitors

- North Valley visitors were the most likely segment to have already been a wine club member prior to their most recent trip to Willamette Valley (57.4% vs. 51.2% for Central Valley and 53.2% for South Valley). However, Central Valley visitors were more likely to have joined a wine club during their trip (30.6% vs. 26.5% for North Valley and 24.0% for South Valley).
- Central Valley visitors spent the most in-market averaging \$330.65 per person followed by North Valley visitors at \$295.45 and South Valley visitors at \$246.49.
- North and Central Valley visitors also went to the most wineries and purchased the most bottles of wine during their trip compared to South Valley visitors (4.1 wineries & 6.7 bottles; 4.5 wineries and 6.8 bottles; 3.4 wineries and 5.3 bottles, respectively).
- On average, Central Valley visitors used the most resources to select wineries to visit during their trip (2.6 vs. 2.3 for North Valley and 2.2 for South Valley). This group was also the likeliest to turn to free winery guides (29.5%), the Oregon Wine Touring Guide (18.0%) and Willamette Valley Wineries Guides (20.2%).



Images of Willamette Valley. Courtesy of Instagram.com/wvwines.

INFOGRAPHIC SUMMARIES: THE WILLAMETTE VALLEY WINE TOURIST

WILLAMETTE VALLEY WINE TOURIST PROFILE

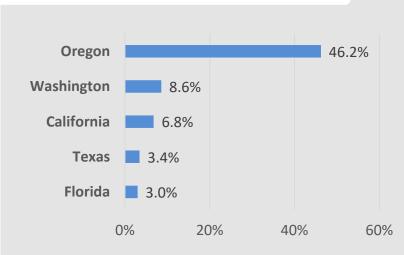
Willamette Valley Winery Association – 2018 Willamette Valley Visitor Profile Study



Domestic vs. International Visitors



Point of Origin: Top States



Important Factors Motivating Trip



I'd been there in the past



Opinions of friends and relatives



Wine event



Information from a wine club

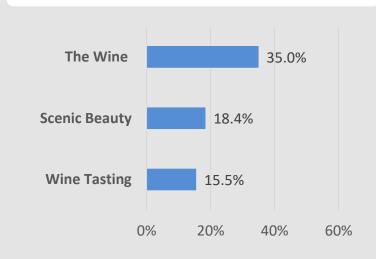


Wine-related magazine



Wine store or retailer

Top Reasons for Choosing Willamette Valley



Key Trip Details



40.9 percent of wine tourists stay overnight in Willamette Valley on their trip. The average overnight visitor spends **2.4 days and 1.3 nights**



The average visiting travel party consists of **3.5 people**

WILLAMETTE VALLEY WINE TOURIST PROFILE

Willamette Valley Winery Association – 2018 Willamette Valley Visitor Profile Study



Willamette Valley Wine Club Membership



of wine tourists were already members of a Willamette Valley wine club prior to their trip



of wine tourists joined a Willamette Valley Wine Club on their trip

Daily In-Market Spending



The average visitor spends **\$264.35** per person, per day in-market of which:

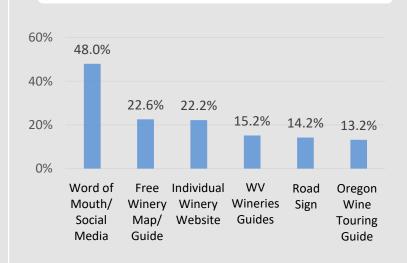


\$84.09 is spent on wine to take/ship home



\$21.13 is spent on wine to consume on trip

Resources Used to Select Wineries Visited



Wineries Visited/Wine Bottles Purchased





Bottles Purchased at these Wineries or Tasting Rooms (on average)

Demographics & Psychographics



Drink Wine at Least a Few Times a Week



Has Children Under 18 – 15.9% Has Children Age 21+ – 49.1%



White/Caucasian (85.5%)
Hispanic/Latino (2.3%)
Asian/Pacific Islander (2.2%)
Black/African-American (0.6%)



Mean Household Income – \$113,436



Mean Age - 51.5



Married/ Partnered – 79.4%



LGBTQ - 4.6%

SUMMARIES OF WILLAMETTE VALLEY VISITOR SEGMENTS

OREGON * RESIDENT

Results presented here are reflective of visitors who live in Oregon

Top Activities Participated In

45.2%

Dining in restaurants



Wine Tasting



Shopping



Brewery/ distillery



16.9%

Winery Tour

Outdoor recreation-Land

Transportation Used In-Market



Personal Vehicle (96.6%)



Walking Rental (3.8%) Vehicle (1.5%)

Point of Origin: Countries



Were a wine club member prior to visit



Joined a wine club on their trip

Wineries Visited



2.7 (On Average)

Wine Bottles Purchased



(on average)

Daily Spending

\$151.31 Per Person

Top Motivations for Visiting

- 1. I'd been there in the past (61.0%)
- 2. Wine event (24.0%)
- 3. Information from a wine club (21.7%)
- 4. Opinions of friends & relatives (21.1%)
- 5. Wine-related magazine (5.2%)

Key Demographics



Average Age



Average Annual Household Income





OUT-OF-STATE RESIDENT

Results presented here are reflective of visitors who live outside the state of Oregon.

Top Activities Participated In

75.9%

Dining in restaurants



Wine Tasting



Shopping



Brewery/ distillery



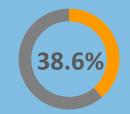


Outdoor recreation-Land

Point of Origin: Top States

- I. Washington (15.9%)
- 2. California (12.6%)
- 3. Texas (6.4%)
- 4. Florida (5.5%)
- 5. Illinois (5.2%)

Willamette Valley Wine Club Details



Were a wine club member prior to visit



Joined a wine club on their trip

Wineries Visited



5.0 (On Average)

Wine Bottles Purchased



Daily Spending

\$416.43Per Person

Top Motivations for Visiting

- 1. I'd been there in the past (47.8%)
- 2. Opinions of friends/relatives (28.4%)
- 3. Wine-related magazine (13.2%)
- 4. Wine event (11.4%)
- 5. Information from a wine club (8.9%)

Key Demographics



Average Age



Average Annual Household Income





INTERNATIONAL RESIDENT

Results presented here are reflective of visitors who live outside the United States.

Top Activities Participated In



Transportation Used In-Market



Personal

Vehicle

(51.7%)







Walking (16.7%)

Point of Origin: Countries

- . Canada (64.7%)
- 2. Australia (5.9%)
- 3. New Zealand (4.7%)
- 4. United Kingdom (3.5%)
- 5. France (2.4%)

- 6. Spain (2.4%)
- 7. Switzerland (2.4%)
- 3. Belgium (1.2%)
- 9. Hong Kong (1.2%)
- 10. Japan (1.2%)

Wineries Visited



4.2 (On Average)

Wine Bottles Purchased



(on average)

Daily Spending

\$441.53 Per Person

Top Motivations for Visiting

- 1. I'd been there in the past (31.7%)
- 2. Opinions of friends & relatives (23.3%)
- 3. Tourism websites (16.7%)
- 4. Wine-related magazine (13.3%)
- 5. Wine store or retailer(13.3%)

Key Demographics











Married/ Partnered



THE WILLAMETTE RESIDENT

Results presented here are reflective of visitors who live in the Willamette Valley

Top Activities Participated In

41.7%

Dining in

restaurants



Wine Tasting



Shopping



Brewery/ distillery



Winery Tour



Outdoor recreation-Land

Transportation Used In-Market



Personal Vehicle (96.3%)



Walking (3.5%)



Rental Vehicle (1.7%)

Willamette Valley Wine Club Details



Were a wine club member prior to visit



on their trip

Wineries Visited



2.5 (On Average)

Wine Bottles Purchased



(on average)

Daily Spending

\$125.68 Per Person

Top Motivations for Visiting

- 1. I'd been there in the past (59.3%)
- 2. Wine event (22.4%)
- 3. Information from a wine club (20.3%)
- 4. Opinions of friends/relatives (19.9%)
- 5. Wine-related magazine (4.0%)

Key Demographics



Average Age



Average Annual Household Income







Results presented here are reflective of visitors who did not stay overnight within the Willamette Valley on their trip

Top Activities Participated In



Wine Tasting



Shopping



Dining in restaurants



Brewery/ distillery



17.8%

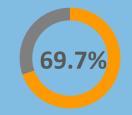
Winery Tour

Outdoor recreation-

Point of Origin: Top States

- 1. Oregon (81.4%)
- 2. Washington (5.3%)
- 3. California (2.2%)
- 4. Texas (1.0%)
- 5. Arizona (0.9%)

Willamette Valley Wine Club Details



Were a wine club member prior to visit



Joined a wine club on their trip

Wineries Visited



2.7 (On Average)

Wine Bottles Purchased



(on average)

Daily Spending

\$139.40 Per Person

Top Motivations for Visiting

- 1. I'd been there in the past (58.9%)
- 2. Wine event (22.2%)
- 3. Opinions of friends/relatives (21.7%)
- 4. Information from a wine club (20.6%)
- 5. Wine-related magazine (5.2%)

Key Demographics



Average Age



Average Annual Household Income







THE PAID LODGING VISITOR

Results presented here are reflective of visitors who stayed overnight in a hotel, home share rental, bed & breakfast, inn or campground during their time in the Willamette Valley

Top Activities Participated In

82.6%

Dining in

restaurants



Wine Tasting



Shopping



Brewery/ distillery



48.4%

Winery Tour

Outdoor recreation-

Accommodations Details



Mean spend on lodging daily – \$270.23



Mean # of nights spent in Willamette Valley – 2.8

Point of Origin: Top States

- . Oregon (19.1%)
- 2. Washington (12.8%)
- 3. California (9.1%)
- 4. Texas (5.9%)
- 5. Florida (4.9%)



Wineries Visited



5.6 (On Average)

Wine Bottles Purchased



(on average)

Daily Spending

\$458.25 Per Person

Top Motivations for Visiting

- 1. I'd been there in the past (47.8%)
- 2. Opinions of friends/relatives (27.2%)
- 3. Wine-related magazine (15.6%)
- 4. Wine event (12.3%)
- 5. Tourism websites (9.1%)

Key Demographics



Average Age \$121,893

Average Annual Household Income



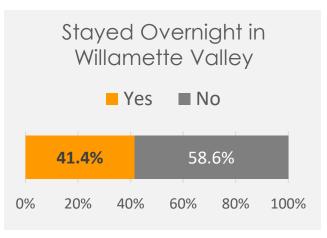


WINE TOURISTS WHO CAME TO WILLAMETTE VALLEY SPECIFICALLY TO TASTE/BUY WINE

Results presented here are reflective of visitors who considered "tasting or buying wine" to be most important to their decision to visit.

Top Activities Participated In











3.9 (On Average)

Wine Bottles Purchased



\$274.85 Per Person

Daily Spending

Top Motivations for Visiting

- 1. I'd been there in the past (56.6%)
- 2. Opinions of friends/relatives (25.4%)
- 3. Wine event (19.3%)
- 4. Information from a wine club (17.2%)
- 5. Wine-related magazine (9.6%)

Key Demographics



Average Age



Mar

Average Annual Household Income Married/ Partnered

79.8%

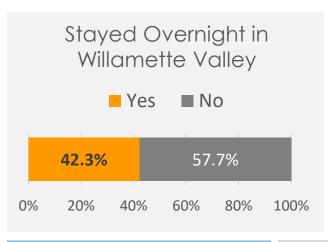


WINE TOURISTS WHO CAME TO WILLAMETTE VALLEY SPECIFICALLY TO EXPERIENCE THE AMBIANCE & ATMOSPHERE

Results presented here are reflective of visitors who considered "experiencing the ambiance and atmosphere of the Willamette Valley" to be most important to their decision to visit.

Top Activities Participated In











3.9 (On Average)

Wine Bottles Purchased



\$274.02 Per Person

Daily Spending

Top Motivations for Visiting

- 1. I'd been there in the past (56.7%)
- 2. Opinions of friends/relatives (26.4%)
- 3. Wine event (18.7%)
- 4. Information from a wine club (16.4%)
- 5. Wine-related magazine (9.8%)

Key Demographics



Average

Age

Average Annual Household Income



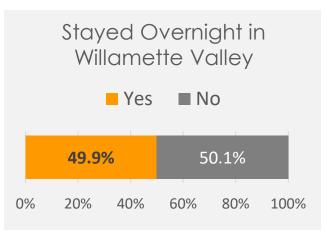


WINE TOURISTS WHO CAME TO WILLAMETTE VALLEY SPECIFICALLY TO LEARN ABOUT THE REGION'S WINE

Results presented here are reflective of visitors who considered "learning about Willamette Valley wines" to be most important to their decision to visit.

Top Activities Participated In











4.5 (On Average)

Wine Bottles Purchased



(on average)

Daily Spending

\$321.20 Per Person

Top Motivations for Visiting

- 1. I'd been there in the past (51.2%)
- 2. Opinions of friends/relatives (30.5%)
- 3. Wine event (19.1%)
- 4. Information from a wine club (15.7%)
- 5. Wine-related magazine (14.2%)

Key Demographics







Average Annual Household Income



Married/ Partnered



WILLAMETTE VALLEY WINE TOURIST TRAVELER PERSONAS

AFFLUENT VISITOR

Results presented here are reflective of visitors who reported having an annual household income of \$140,000 or more.

Top Activities Participated In

66.5%

Dining in restaurants



Wine Tasting



Shopping



Brewery/ distillery



36.2%

Winery Tour

Outdoor recreation-Land

Point of Origin: Top States

- I. Oregon (34.8%)
- 2. Washington (8.9%)
- 3. California (8.7%)
- 4. Texas (4.9%)
- 5. Illinois (3.7%)

Willamette Valley Wine Club Details



Were a wine club member prior to visit



Joined a wine club on their trip

Daily Spending

Wineries Visited



4.2 (On Average)

Wine Bottles Purchased



\$333.66

Per Person

Top Motivations for Visiting

- 1. I'd been there in the past (54.9%)
- 2. Opinions of friends/relatives (23.4%)
- 3. Wine event (19.9%)
- 4. Information from a wine club (15.9%)
- 5. Wine-related magazine (10.5%)

Key Demographics



Average Age



Average Annual Household Income





OUTDOOR ENTHUSIAST

Results presented here are reflective of visitors who participated in land or water based outdoor recreation on their trip to the Willamette Valley

Top Activities Participated In



Wine tasting



Winery tour



Outdoor recreation-Land



Shopping



80.4%

Dining in

restaurants

Visit a park

Willamette Valley Towns Visited

- 1. Dundee Hills (61.8%)
- 2. McMinnville (53.5%)
- 3. Yamhill-Carlton (42.2%)
- 4. Portland (42.7%)
- 5. Eola-Amity Hills (30.8%)
- 6. Chehalem Mountains (25.6%)

Willamette Valley Wine Club Details



Were a wine club member prior to visit



Joined a wine club on their trip

Wineries Visited



4.4 (On Average)

Wine Bottles Purchased



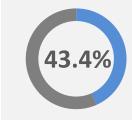
(on average)

Daily Spending

Per Person

\$352.01

Visited Other Areas Outside WV



Visited areas outside Willamette Valley

Top Areas Visited

- Outdoor attractions (23.1%)
- Cannon Beach, OR (16.9%)
- Bend, OR (13.2%)
- Columbia River, OR (10.2%)
- Mt Hood, OR (8.3%)

Key Demographics



Average Age



Average Annual Household Income







SPECIAL EVENT GOER

Results presented here are reflective of visitors who attended a festival or special event during their trip in the Willamette Valley and said they would be likely to return to the area for another special event

Top Activities Participated In



Attend a festival or special event



Winery tour



Wine tasting



Shopping





Brewery/ distillery

Point of Origin: Top States

- 1. Oregon (61.6%)
- 2. Washington (8.1%)
- 3. California (5.6%)
- 4. Colorado (2.8%)
- 5. Texas (2.5%)

Willamette Valley Wine Club Details



Were a wine club member prior to visit



Joined a wine club on their trip

Wineries Visited



3.8 (On Average)

Wine Bottles Purchased



(on average)

Daily Spending

\$277.37 Per Person

Top Motivations for Visiting

- 1. I'd been there in the past (61.8%)
- 2. Wine event (50.7%)
- 3. Information from a wine club (26.3%)
- 4. Opinions of friends & relatives (24.9%)
- 5. Wine-related magazine (11.1%)

Key Demographics



Average Age



Average Annual Household Income







Results presented here are reflective of visitors who visited a brewery or distillery during their trip to the Willamette Valley

Top Activities Participated In







Winery Tour



Wine Tasting



Shopping



80.9%

Bars/nightlife

Point of Origin: Top States

- Oregon (40.0%)
- California (8.3%)
- Washington (7.1%)
- Illinois (4.3%)
- Texas (4.2%)

Willamette Valley Wine Club Details



Were a wine club member prior to visit



Joined a wine club on their trip

Wineries Visited



4.7 (On Average)

Wine Bottles Purchased



Daily Spending

\$344.29 Per Person

Top Motivations for Visiting

- 1. I'd been there in the past (53.6%)
- 2. Opinions of friends/relatives (30.5%)
- 3. Wine event (15.1%)
- 4. Information from a wine club (13.5%)
- 5. Wine-related magazine (13.3%)

Key Demographics



Average Age



Average Annual Household Income





WILLAMETTE VALLEY WINE TOURIST SUMMARIES BY GENERATION

THE MILLENNIAL WINE TOURIST

Top Activities Participated In

49.3%

Dining in restaurants







Brewery/ distillery



Shopping



28.3%

Winery Tour

Bars/Nightlife

Under \$14

Point of Origin: Top States

- I. Oregon (62.5%)
- 2. Washington (6.7%)
- 3. California (4.7%)
- 4. Texas (3.4%)
- 5. Illinois (2.3%)

Willamette Valley Wine Club Details



Were a wine club member prior to visit



Joined a wine club on their trip

Wineries Visited



3.1 (On Average)

24.8%

Wine Bottles Purchased



(on average)

Daily Spending

\$192.58Per Person

Wine Purchase Frequency

			Several	several	
	Weekly	Monthly	year	times per year	Never
\$50 or more	1.5%	8.1%	25.5%	35.6%	29.4%
\$30 - \$49.99	3.1%	18.2%	35.5%	30.0%	13.2%
\$20 - \$29.99	6.8%	30.6%	40.3%	17.1%	5.2%
\$14 - \$19.99	16.2%	34.4%	31.4%	12.2%	5.9%

23.4%

19.0%

14.4%

18.3%

Key Demographics



Average Age \$96,770

Average Annual Household Income





THE GEN X WINE TOURIST

Top Activities Participated In

57.7%

Dining in restaurants



Wine Tasting



Shopping



Brewery/ distillery



28.6%

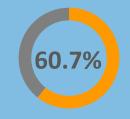
Winery Tour

Outdoor recreation-

Point of Origin: Top States

- 1. Oregon (49.4%)
- 2. Washington (9.2%)
- 3. California (6.4%)
- 4. Texas (3.4%)
- 5. Illinois (3.0%)

Willamette Valley Wine Club Details



Were a wine club member prior to visit



Joined a wine club on their trip

Wineries Visited



3.7 (On Average)

Wine Bottles Purchased



(on average)

Daily Spending

\$249.86Per Person

Wine Purchase Frequency

			Several times per	Less than several times per	
	Weekly	Monthly	year	year	Never
\$50 or more	2.0%	10.8%	32.3%	34.1%	20.7%
\$30 - \$49.99	4.0%	20.8%	42.4%	24.7%	8.1%
\$20 - \$29.99	9.3%	30.7%	40.9%	15.3%	3.7%
\$14 - \$19.99	17.6%	31.4%	28.1%	16.9%	6.0%
Under \$14	22.0%	20.7%	16.4%	22.1%	18.9%

Key Demographics



Average Age \$119,378

Average Annual Household Income 80.1%



THE BOOMER WINE TOURIST

Top Activities Participated In

63.0%

Dining in restaurants



Wine Tasting



Shopping



Brewery/ distillery



30.3%

Winery Tour

Outdoor recreation-

Point of Origin: Top States

- I. Oregon (40.1%)
- 2. Washington (8.6%)
- 3. California (7.4%)
- 4. Florida (4.1%)
- 5. Texas (3.5%)

Willamette Valley Wine Club Details



Were a wine club member prior to visit



Joined a wine club on their trip

Wineries Visited



3.9 (On Average)

Wine Bottles Purchased



(on average)

Daily Spending

\$258.63Per Person

Wine Purchase Frequency

			Several times per	Less than several times per	
	Weekly	Monthly	year	year	Never
\$50 or more	2.3%	9.0%	30.2%	33.3%	25.3%
\$30 - \$49.99	4.3%	17.4%	40.9%	26.2%	11.2%
\$20 - \$29.99	8.1%	27.0%	42.0%	18.1%	4.7%
\$14 - \$19.99	15.0%	31.8%	28.3%	17.6%	7.3%
Under \$14	20.2%	20.9%	17.4%	21.7%	19.9%

Key Demographics



Average Age



Average Annual Household Income

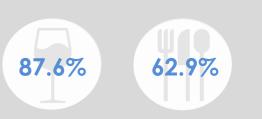




WILLAMETTE VALLEY WINE TOURIST SUMMARIES BY REGION VISITED

THE NORTH VALLEY **VISITOR**

Top Activities Participated In



Wine Tasting Dining in restaurants



Shopping





32.6%

Winery Tour

Top Areas/Towns Visited

- Dundee Hills (75.3%)
- Yamhill-Carlton (47.8%)
- McMinnville (43.4%)
- Portland (30.0%)
- Chehalem Mountains (29.6%)

Willamette Valley Wine Club Details



Were a wine club member prior to visit



Joined a wine club on their trip

Daily Spending

Wineries Visited



4.1 (On Average)

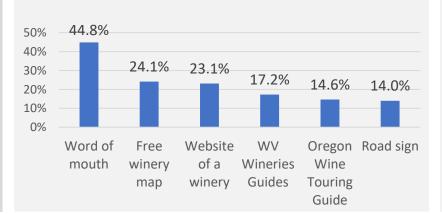
Wine Bottles Purchased



\$295.45 Per Person

(on average)

Resources Used to Select Wineries



Key Demographics



Age

Average Average Annual Household Income





THE CENTRAL VALLEY VISITOR

Top Activities Participated In







Shopping Brewery/distillery



38.2%

Winery Tour

16.0%

Point of Origin: Top States

- 1. McMinnville (72.4%)
- 2. Dundee Hills (64.6%)
- 3. Yamhill-Carlton (45.5%)
- 4. Eola-Amity Hills (43.8%)
- 5. Portland (31.1%)

Willamette Valley Wine Club Details



Were a wine club member prior to visit



Joined a wine club on their trip

Daily Spending

Wineries Visited



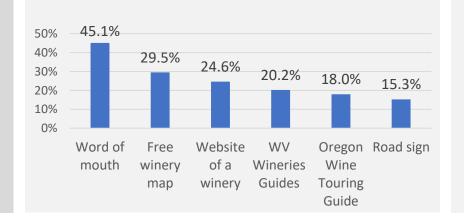
4.5 (On Average)

Wine Bottles Purchased



\$330.65 Per Person

Resources Used to Select Wineries



Key Demographics



Average Age



Average Annual Household Income





THE SOUTH VALLEY VISITOR

Top Activities Participated In





Winery Tour



Brewery/ distillery



19.2%

Point of Origin: Top States

- 1. Eugene (76.3%)
- 2. Corvallis (34.8%)
- 3. McMinnville (32.4%)
- 4. Dundee Hills (29.3%)
- 5. Portland (27.5%)

Willamette Valley Wine Club Details



Were a wine club member prior to visit



Joined a wine club on their trip

Wineries Visited



3.4 (On Average)

Wine Bottles Purchased



(on average)

Daily Spending

\$246.49Per Person

Resources Used to Select Wineries



Key Demographics



Average Age



Average Annual Household Income



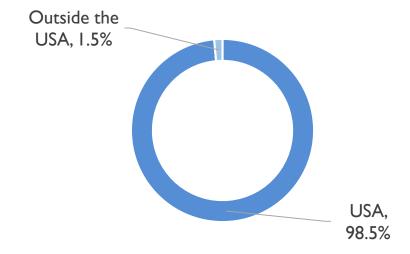


DETAILED FINDINGS: THE WILLAMETTE VALLEY WINE TOURIST

POINT OF ORIGIN: DOMESTIC VS. INTERNATIONAL

In total, 1.5 percent of wine tourists to the Willamette Valley surveyed are from international markets. International wine tourists had equal propensity to visit the north (1.4%), central (1.6%) and south valley (1.5%) regions of Willamette Valley.

Figure 1: Place of Residence



Question: Where do you currently live? Base: All survey respondents. 5,946 responses.

Detail by Visitor Type

	North Valley Visitor	Central Valley Visitor	South Valley Visitor	Wine Club Member	Non-Wine Club Member	Heavy Wine Consumer	Light Wine Consumer
USA	98.6%	98.4%	98.5%	99.5%	97.1%	98.8%	97.8%
Outside the USA	1.4%	1.6%	1.5%	0.5%	2.9%	1.2%	2.2%
Base	3709	2701	667	2832	1260	1872	1483

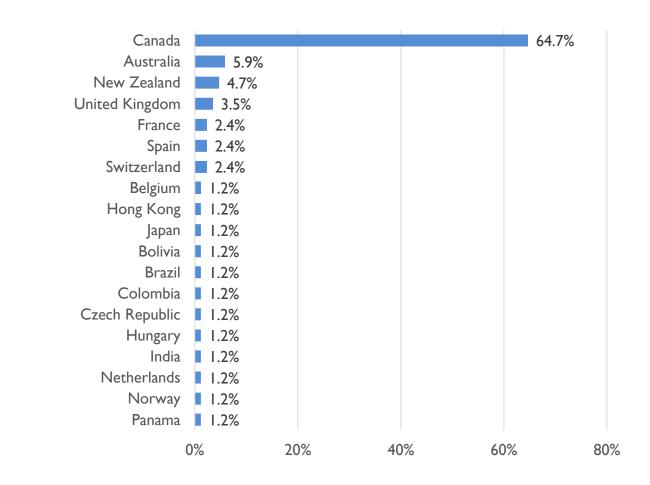
INTERNATIONAL WINE TOURISTS: COUNTRY OF RESIDENCE

The top international markets represented in the survey sample were Canada (64.7%), Australia (5.9%), New Zealand (4.7%) and the United Kingdom (3.5%). A notable proportion of international visitors surveyed were from European countries (16.5%), followed by South America (4.7%) and Asia (3.5%).

Please note that the survey questionnaire was only available in English.

Question: What is your country of residence? Base: International survey respondents. 85 responses.

Figure 2: Country of Residence



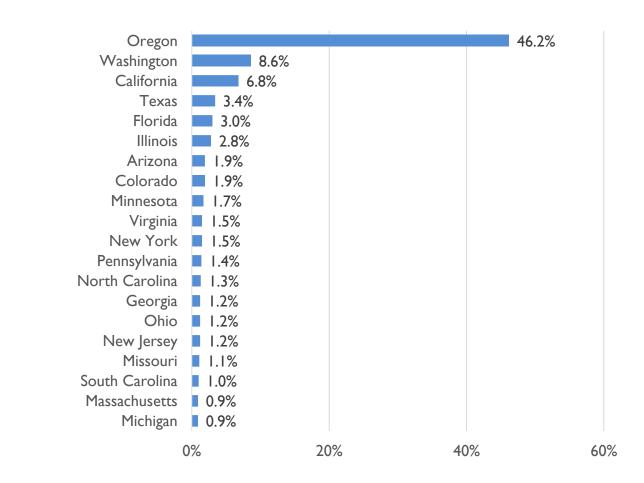
DOMESTIC WINE TOURISTS: STATE OF RESIDENCE

While in-state residents deliver a significant proportion of Willamette Valley wine tourist volume, over half of domestic Willamette Valley wine tourists are out-of-state residents (53.8%).

The top out-of-state markets (by state) are Washington (8.6%), California (6.8%), Texas (3.4%) and Florida (3.0%).

Question: In which state do you reside? Base: Domestic survey respondents. 7871 responses.

Figure 3: Domestic Wine Tourists—State of Residence



DOMESTIC WINE TOURISTS: STATE OF RESIDENCE BY TYPE OF VISITOR

	North Valley	Central Valley	South Valley	Wine Club	Non-Wine	Heavy Wine	Light Wine
	Visitor	Visitor	Visitor	Member	Club Member	Consumer	Consumer
Oregon	50.6%	44.9%	59.1%	62.1%	42.9%	51.5%	71.7%
Washington	9.4%	9.3%	4.8%	8.6%	8.5%	10.2%	6.0%
California	5.8%	6.4%	6.2%	4.3%	7.7%	5.3%	4.1%
Texas	3.3%	3.8%	2.5%	2.7%	3.2%	3.3%	1.5%
Florida	2.8%	3.1%	3.2%	2.0%	3.1%	2.5%	1.7%
Illinois	2.4%	2.7%	1.6%	1.8%	2.9%	2.5%	1.1%
Arizona	1.9%	2.0%	1.7%	1.3%	2.4%	1.9%	1.1%
Colorado	1.9%	2.4%	1.5%	1.4%	2.6%	1.9%	1.2%
Minnesota	1.4%	1.7%	1.4%	1.1%	1.7%	1.3%	0.9%
Virginia	1.3%	1.6%	1.1%	0.9%	1.6%	1.3%	0.6%
New York	1.2%	1.4%	1.2%	0.9%	1.3%	1.1%	0.6%
Pennsylvania	1.1%	1.0%	0.9%	0.6%	1.4%	1.3%	0.3%
North Carolina	0.9%	0.9%	0.5%	0.6%	1.1%	0.9%	0.4%
Georgia	1.2%	1.3%	1.2%	0.9%	1.3%	1.1%	0.6%
Ohio	1.1%	1.4%	0.7%	1.1%	0.7%	1.1%	0.4%
New Jersey	1.0%	1.2%	0.8%	0.7%	1.5%	0.9%	0.6%
Missouri	0.9%	1.1%	0.6%	0.7%	0.9%	1.2%	0.3%
South Carolina	0.8%	1.0%	0.4%	0.6%	0.7%	0.7%	0.3%
Massachusetts	0.8%	0.9%	0.7%	0.5%	1.2%	0.6%	0.6%
Michigan	0.7%	0.8%	0.4%	0.5%	0.8%	0.4%	0.5%
Wisconsin	0.6%	0.8%	0.5%	0.3%	1.0%	0.5%	0.6%
Kansas	0.7%	0.9%	0.3%	0.5%	1.0%	0.5%	0.3%
Nevada	0.6%	0.9%	1.3%	0.4%	1.0%	0.7%	0.4%
Maryland	0.6%	0.7%	0.6%	0.4%	0.6%	0.6%	0.2%
Tennessee	0.7%	0.7%	0.5%	0.5%	0.7%	0.7%	0.3%
Indiana	0.5%	0.6%	0.8%	0.3%	0.8%	0.4%	0.5%

Question: In which state do you reside?

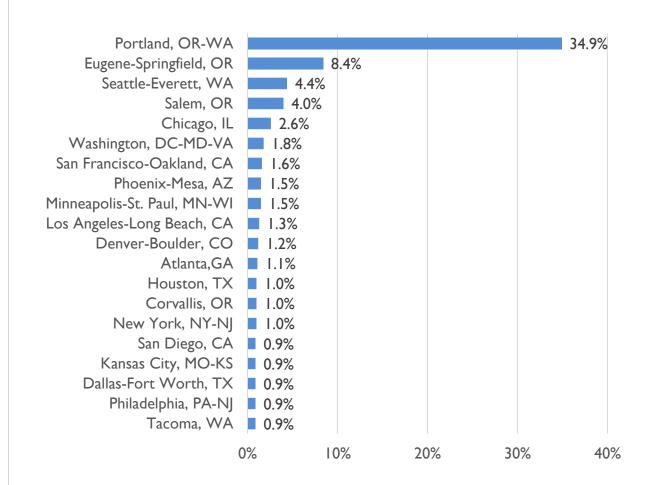
Base: Domestic survey respondents. 7871 responses.

DOMESTIC WINE TOURISTS: MSA

The top Willamette Valley wine tourist markets by metro area are Portland, OR-WA (34.9%) and Eugene-Springfield, OR (8.4%). The top out-of-state metro markets are Seattle-Everette, WA (4.4%), Chicago, IL (2.6%) and Washington, DC-MD-VA (1.8%).

Question: What is your zip code? Base: Domestic survey respondents. 7871 responses.

Figure 4: Domestic Wine Tourists—MSA



DOMESTIC WINE TOURISTS: MSA BY TYPE OF VISITOR

		Central			Non-Wine		
	North Valley	Valley	South Valley	Wine Club	Club	Heavy Wine	Light Wine
Column %	Visitor	Visitor	Visitor	Member	Member	Consumer	Consumer
Portland, OR-WA	47.3%	31.2%	7.2%	47.8%	30.7%	43.2%	49.3%
Eugene-Springfield, OR	2.6%	5.3%	46.3%	11.0%	8.0%	6.1%	16.2%
Seattle-Everett, WA	4.4%	4.8%	2.8%	3.6%	5.0%	4.7%	2.8%
Salem, OR	3.0%	7.8%	2.4%	5.1%	3.7%	3.9%	6.8%
Chicago, IL	2.3%	2.6%	1.7%	1.7%	2.8%	2.3%	1.1%
Washington, DC-MD-VA	1.6%	1.9%	1.4%	1.2%	1.5%	1.5%	0.6%
San Francisco-Oakland, CA	1.3%	1.3%	0.9%	1.0%	1.8%	1.1%	1.0%
Phoenix-Mesa, AZ	1.7%	1.7%	1.4%	1.2%	2.1%	1.6%	1.0%
Minneapolis-St. Paul, MN-WI	1.4%	1.7%	1.0%	1.1%	1.5%	1.2%	0.8%
Los Angeles-Long Beach, CA	1.0%	1.0%	1.1%	0.8%	1.1%	1.1%	0.6%
Denver-Boulder, CO	1.3%	1.5%	1.2%	1.0%	1.7%	1.3%	0.8%
Atlanta,GA	1.1%	1.2%	1.1%	0.9%	1.1%	1.0%	0.5%
Houston, TX	1.0%	1.0%	0.4%	0.9%	0.7%	0.8%	0.4%
Corvallis, OR	0.8%	1.7%	3.3%	1.4%	0.9%	1.2%	1.7%
New York, NY-NJ	0.8%	0.9%	0.9%	0.6%	0.8%	0.8%	0.4%
San Diego, CA	0.9%	1.0%	0.8%	0.7%	1.0%	0.7%	0.7%
Kansas City, MO-KS	0.8%	1.0%	0.4%	0.6%	0.9%	0.8%	0.2%
Dallas-Fort Worth, TX	1.0%	1.2%	0.6%	0.8%	0.9%	1.1%	0.4%
Philadelphia, PA-NJ	0.7%	0.8%	0.7%	0.5%	0.7%	0.9%	0.2%
Tacoma, WA	1.1%	1.2%	0.8%	1.0%	0.9%	1.3%	0.4%
Orange County, CA	0.7%	0.9%	0.7%	0.5%	0.8%	0.7%	0.4%
Boston, MA	0.5%	0.7%	0.3%	0.4%	0.8%	0.5%	0.5%
St. Louis, MO-IL	0.6%	0.8%	0.3%	0.4%	0.7%	0.7%	0.3%
Austin-San Marcos, TX	0.5%	0.7%	0.3%	0.3%	0.9%	0.8%	0.1%
Charlotte-Gastonia-Rock Hill, NC-SC	0.3%	0.4%	0.1%	0.2%	0.4%	0.3%	0.1%
Las Vegas, NV-AZ	0.4%	0.6%	0.9%	0.2%	0.7%	0.3%	0.4%
Tampa-St. Petersburg-Clearwater, FL	0.5%	0.6%	0.3%	0.4%	0.3%	0.6%	0.2%

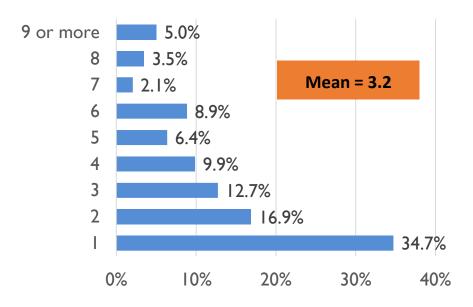
Question: What is your zip code?

Base: Domestic survey respondents. 7871 responses.

NUMBER OF TRIPS

The typical Willamette Valley wine tourist has taken 3.2 trips to Willamette Valley to taste and/or buy the region's wine. Oregon residents have taken more of these types of trips to/within the region in the past compared to out-of-state visitors (4.5 vs. 1.8 on average, respectively). Even so, repeat visitation amongst out-of-state residents is notable with over a third of this group stating they have taken multiple trips to the Willamette Valley to buy or taste wine (34.9%).

Figure 5: Number of Trips



Detail by Visitor Type

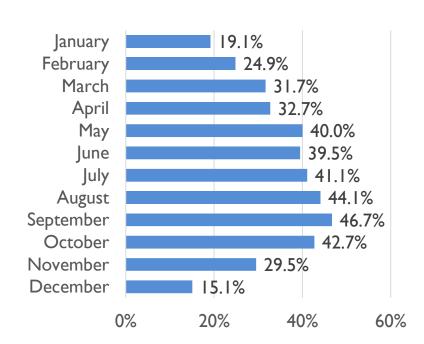
	Oregon Resident	Out of State	North Valley Visitor	Central Valley Visitor	South Valley Visitor	Wine Club Member	Non-Wine Club Member	Heavy Wine Consumer	Light Wine Consumer
9 or more	8.7%	0.8%	4.8%	4.0%	3.8%	6.8%	1.5%	5.0%	5.5%
8	6.2%	0.4%	3.2%	2.2%	4.1%	4.6%	1.2%	3.6%	3.9%
7	3.5%	0.4%	2.0%	1.6%	2.3%	2.6%	1.1%	1.6%	2.4%
6	14.6%	2.3%	8.0%	6.6%	10.0%	11.5%	3.6%	9.6%	9.5%
5	10.4%	1.8%	6.1%	4.9%	5.5%	8.0%	3.2%	6.5%	7.5%
4	14.8%	4.2%	8.6%	7.8%	12.3%	11.3%	7.1%	9.2%	11.6%
3	17.1%	7.8%	12.5%	10.4%	12.3%	13.4%	11.3%	11.0%	15.5%
2	16.6%	17.1%	16.0%	17.6%	19.8%	15.0%	20.5%	15.9%	17.3%
1	8.1%	65.1%	38.7%	44.9%	29.9%	26.8%	50.4%	37.6%	26.8%
Mean	4.5	1.8	3.1	2.7	3.3	3.7	2.2	3.2	3.5
Base	1786	1569	2664	1720	652	2226	1129	1286	1565

Question: How many of these trips [to the Willamette Valley in which you tasted and/or bought Willamette Valley wine] did you take? Base: All survey respondents. 3,355 responses.

MONTH TRIP WAS TAKEN

Although wine tourists visit the Willamette Valley throughout the year, peak visitation appears to occur between the months of July and October. Over 40 percent of all wine tourists surveyed made a trip to the Willamette Valley during these months. Visitation is lowest during the winter months of December and January across all visitor segments.

Figure 6: Month Trip Was Taken



Detail by Visitor Type

	Oregon Resident	Out of State	North Valley Visitor	Central Valley Visitor	South Valley Visitor	Wine Club Member	Non-Wine Club Member	Heavy Wine Consumer	Light Wine Consumer
January	29.4%	6.4%	17.6%	17.8%	22.1%	23.1%	9.3%	18.3%	21.8%
February	38.3%	8.2%	23.6%	22.1%	25.0%	30.0%	12.0%	24.8%	27.1%
March	48.2%	11.2%	30.5%	28.1%	30.8%	37.9%	16.2%	31.1%	35.9%
April	48.5%	13.1%	31.2%	28.8%	33.4%	37.5%	21.0%	32.2%	37.0%
May	57.7%	18.1%	38.6%	36.0%	40.3%	46.0%	25.3%	40.2%	43.9%
June	56.9%	17.9%	36.9%	35.3%	45.1%	44.2%	27.7%	38.5%	45.3%
July	56.5%	22.0%	38.9%	37.1%	45.9%	45.7%	29.5%	39.5%	46.6%
August	61.3%	22.7%	42.0%	40.1%	45.0%	49.2%	31.1%	42.4%	50.3%
September	62.0%	27.7%	45.3%	43.7%	50.3%	51.7%	34.5%	44.9%	50.8%
October	57.9%	23.8%	41.3%	38.1%	39.6%	49.2%	26.8%	44.2%	44.2%
November	44.7%	10.7%	27.7%	24.6%	30.6%	35.9%	13.7%	30.7%	31.7%
December	23.3%	4.8%	13.8%	14.0%	18.0%	18.2%	7.3%	14.4%	17.2%
Base	3367	2717	4877	3323	1073	4311	1712	2425	2569

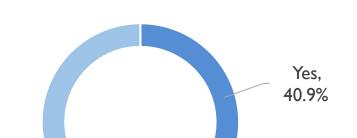
Question: In which month(s) did you take this trip(s)? (Select all that apply) Base: All survey respondents. 6,084 responses.

OVERNIGHT STAY IN WILLAMETTE VALLEY

Four-in-ten Willamette Valley wine tourists stayed overnight in the Willamette Valley during their trip (40.9%). As expected, out-of-state visitors were significantly more likely to have stayed overnight in the region on their most recent trip compared to in-state visitors (72.9% vs. 14.8%). Additionally, wine tourists who made a trip to the central valley were more likely to stay overnight in the region compared to north and south valley visitors (55.9% vs. 44.6% and 46.3%, respectively). Non-wine club members (51.3%) and heavy wine consumers (44.3%) were also more likely than their counterparts to stay overnight outside their home within the Willamette Valley.

Figure 7: Overnight Stay in Willamette Valley

No, 59.1%



Detail by Visitor Type

	Oregon Resident	Out of State	North Valley Visitor	Central Valley Visitor	South Valley Visitor	Wine Club Member	Non-Wine Club Member	Heavy Wine Consumer	Light Wine Consumer
Yes	14.8%	72.9%	44.6%	55.9%	46.3%	36.7%	51.3%	44.3%	26.9%
No	85.2%	27.1%	55.4%	44.1%	53.7%	63.3%	48.7%	55.7%	73.1%
Base	3481	2846	5081	3475	1125	4311	1712	2527	2759

Question: On this trip, will you be staying overnight in the Willamette Valley anywhere outside your home? Base: All survey respondents. 6,327 responses.

DAY-TRIP ORIGIN

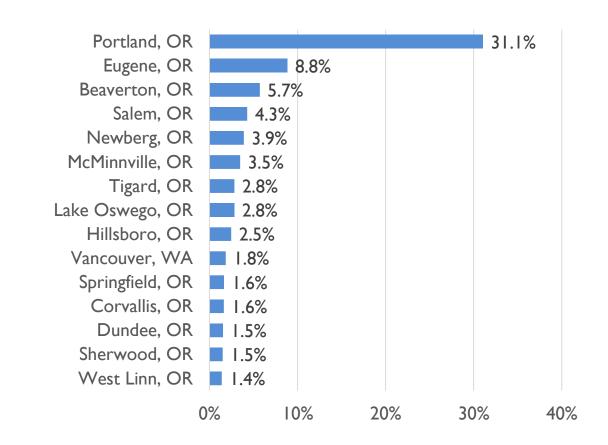
Wine tourists who were not staying overnight in the Willamette Valley during their visit were most commonly on day-trips from Portland (31.1%). Following Portland, just under 10 percent of day trippers surveyed made their trip to the Willamette Valley from Eugene (8.8%) or Beaverton (5.7%).

Out-of-state visitors from this group were most likely to be on daytrips from Portland (46.5%) or Vancouver, WA (9.0%).

Detail by type of visitor is presented on the following page

Question: What town did you day-trip from? Base: Day-trip survey respondents. 3642 responses.

Figure 8: Day-Trip Origin



DAY-TRIP ORIGIN BY TYPE OF VISITOR

Detail by Visitor Type

	Oregon		North Valley	Central Valley	South Valley	Wine Club	Non-Wine	Heavy Wine	Light Wine
	Resident	Out of State	Visitor	Visitor	Visitor	Member	Club Member	Consumer	Consumer
Portland, OR	27.1%	46.5%	38.2%	28.7%	6.7%	29.2%	37.3%	35.7%	27.6%
Eugene, OR	10.7%	1.7%	1.5%	4.3%	47.4%	9.2%	7.2%	5.6%	11.7%
Beaverton, OR	5.9%	5.1%	7.1%	4.1%	0.5%	6.5%	3.1%	4.6%	6.5%
Salem, OR	5.1%	0.9%	2.7%	9.2%	1.2%	4.1%	4.4%	3.4%	4.9%
Newberg, OR	4.6%	1.1%	4.9%	3.0%	0.2%	3.6%	5.0%	3.8%	4.0%
McMinnville, OR	4.2%	0.7%	3.4%	6.9%	0.7%	3.4%	3.2%	2.7%	3.9%
Tigard, OR	3.2%	1.5%	3.4%	2.0%	0.3%	3.1%	2.0%	3.2%	2.6%
Lake Oswego, OR	3.0%	2.1%	3.4%	2.5%	0.3%	3.1%	1.9%	2.9%	2.6%
Hillsboro, OR	2.7%	1.5%	3.1%	1.8%	0.3%	2.6%	2.0%	2.9%	2.4%
Vancouver, WA	0.0%	9.0%	2.2%	2.1%	0.5%	1.9%	1.7%	2.2%	1.5%
Springfield, OR	2.0%	0.4%	0.4%	0.9%	7.9%	1.7%	1.8%	1.1%	2.3%
Corvallis, OR	1.9%	0.5%	0.9%	2.8%	3.7%	1.6%	1.8%	1.7%	1.6%
Dundee, OR	1.8%	0.5%	2.0%	1.4%	0.2%	1.5%	1.7%	1.8%	1.5%
Sherwood, OR	1.8%	0.3%	1.9%	1.1%	0.2%	1.5%	1.4%	1.4%	1.8%
West Linn, OR	1.7%	0.4%	1.8%	0.7%	0.2%	1.8%	0.4%	2.1%	1.0%

Question: What town did you day-trip from? Base: Day-trip survey respondents. 3642 responses.

PLACE OF STAY IN WILLAMETTE VALLEY

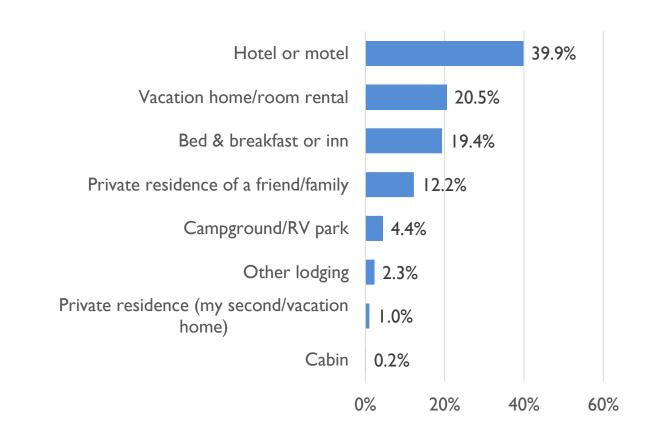
Wine tourists staying overnight in Willamette Valley were most likely to have chosen hotels for their accommodations (39.9%), although one in five rented a vacation home (20.5%) and another one-fifth stayed in a bed & breakfast or inn . Overnight visitors from within Oregon and out-of-state were equally likely to have stayed in a Willamette Valley area hotel (40.6% and 39.7%, respectively) during their trip. However, out-of-state visitors were slightly more likely to have stayed in a vacation home rental (21.7% vs. 15.9%) or a bed & breakfast (20.5% vs. 14.8%) compared to in-state visitors.

South valley visitors were more likely than others to have stayed in the private residence of a friend or family member on their most recent trip to the Willamette Valley (18.8%).

Detail by type of visitor is presented on the following page

Question: Where are you staying overnight in the Willamette Valley? Base: Respondents who stayed overnight in Willamette Valley. 2,589 responses.

Figure 9: Place of Stay in Willamette Valley



PLACE OF STAY IN WILLAMETTE VALLEY BY TYPE OF VISITOR

Detail by Visitor Type

			North	Central	South		Non-Wine	Heavy	
	Oregon	Out of	Valley	Valley	Valley	Wine Club	Club	Wine	Light Wine
	Resident	State	Visitor	Visitor	Visitor	Member	Member	Consumer	Consumer
Hotel or motel	40.6%	39.7%	39.9%	39.0%	41.7%	39.3%	39.4%	38.9%	42.6%
Vacation home/room rental such as booked through Airbnb or VRBO	15.9%	21.7%	21.9%	21.8%	16.3%	21.9%	19.0%	20.1%	15.7%
Bed & breakfast or inn	14.8%	20.5%	20.5%	21.0%	14.2%	19.4%	20.6%	20.2%	16.7%
Private residence of a friend or family member	14.6%	11.7%	10.6%	10.4%	18.8%	11.5%	12.9%	13.0%	16.5%
Campground/RV park	7.0%	3.8%	3.8%	4.8%	6.0%	4.0%	5.0%	4.4%	4.5%
Other lodging	4.5%	1.8%	2.2%	2.0%	0.8%	2.4%	2.2%	2.4%	2.4%
Private residence (my second/vacation home)	2.1%	0.8%	1.0%	0.8%	1.7%	1.2%	0.8%	0.9%	1.2%
Cabin	0.6%	0.1%	0.1%	0.2%	0.6%	0.3%	0.1%	0.1%	0.4%
Base	515	2074	2264	1942	521	1582	878	1120	741

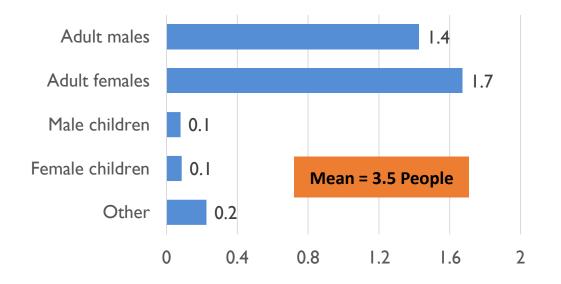
Question: Where are you staying overnight in the Willamette Valley?

Base: Respondents who stayed overnight in Willamette Valley. 2,589 responses.

TRAVEL PARTY COMPOSITION

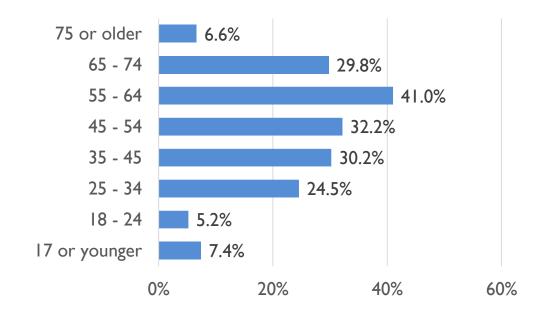
The average travel party of Willamette Valley wine tourists was comprised of 3.5 people and less than 10 percent (7.4%) included children under the age of 18. The charts below summarize the average number of people in a typical wine tourist's travel party (left) and the percent of travel parties that had people within certain age groups (right). Results broken out by type of visitor are shown on the following page.

Figure 10: Immediate Travel Party by Gender



Question: Please tell me about your IMMEDIATE travel party. How many identify as male or female, and what are their ages? Base: All survey respondents. 6327 responses.

Figure X: Immediate Travel Party by Age



TRAVEL PARTY COMPOSITION BY TYPE OF TRAVELER

Although Oregon residents and out-of-state visitors had similar travel party sizes (3.6 vs. 3.3, respectively), in-state visitors were more likely to be visiting with younger adults aged 18-34 (33.8% vs. 24.9% for out-of-state residents) while out-of-state visitors were more likely to have older travelers in their party aged 55 or older (81.3% vs. 74.2%).

South valley visitors were the most likely group to be traveling with children under the age of 18 (9.0%) as well as the most likely group to be traveling with people aged 55 or older (83.3%).

Question: Please tell me about your IMMEDIATE travel party. How many identify as male or female, and what are their ages? Base: All survey respondents. 6327 responses.

Detail by Visitor Type

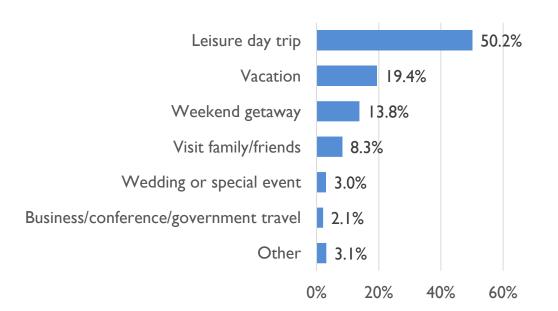
			North	Central	South		Non-Wine	Heavy	
	Oregon	Out of	Valley	Valley	Valley	Wine Club	Club	Wine	Light Wine
	Resident	State	Visitor	Visitor	Visitor	Member	Member	Consumer	Consumer
Adult Males	1.4	1.4	1.5	1.4	1.3	1.5	1.3	1.5	1.3
Adult Females	1.8	1.6	1.7	1.6	1.7	1.7	1.6	1.7	1.7
Male Children	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1
Female Children	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1
Other	0.2	0.2	0.2	0.2	0.3	0.2	0.2	0.2	0.2
Mean # of People	3.6	3.3	3.5	3.4	3.5	3.6	3.3	3.5	3.3
Base	3335	2689	4877	3323	1073	4311	1712	2425	2569

			North	Central	South		Non-Wine		
	Oregon		Valley	Valley	Valley	Wine Club	Club	Heavy Wine	Light Wine
	Resident	Out of State	Visitor	Visitor	Visitor	Member	Member	Consumer	Consumer
75 or older	7.1%	6.1%	6.1%	6.4%	8.2%	6.8%	6.5%	6.5%	6.7%
65 - 74	28.7%	31.0%	29.2%	32.1%	32.8%	31.3%	27.5%	29.4%	28.6%
55 - 64	38.4%	44.2%	41.1%	42.6%	42.3%	42.2%	38.8%	40.7%	37.7%
45 - 54	33.1%	31.0%	32.7%	32.4%	28.8%	33.3%	28.2%	33.3%	29.6%
35 - 45	33.1%	26.6%	31.0%	27.3%	26.4%	30.3%	28.8%	32.5%	30.5%
25 - 34	27.9%	20.5%	24.4%	21.7%	24.7%	22.4%	27.6%	21.5%	30.0%
18 - 24	5.9%	4.4%	4.9%	4.8%	6.4%	3.9%	6.2%	4.3%	6.5%
17 or younger	8.5%	6.1%	7.2%	6.6%	9.0%	7.5%	6.7%	7.0%	8.4%
Base	3451	2822	5035	3444	1117	4279	1704	2499	2741

PRIMARY REASON FOR TRIP

Half of wine tourists to Willamette Valley—largely driven by Oregon residents—were visiting the area for leisure day trips, while one-third—largely driven by out-of-state visitors—were visiting as part of a vacation or weekend getaway. In total, 3.0 percent of wine tourists were visiting because of a wedding or special event. Out-of-state visitors and non-wine club members were the most likely segments to be in Willamette Valley as part of a business, a conference or government travel (3.4% and 3.8%, respectively).

Figure 11: Primary Reason for Trip



Detail by Visitor Type

	Oregon Resident	Out of State	North Valley Visitor	Central Valley Visitor	South Valley Visitor	Wine Club Member		Heavy Wine Consumer	Light Wine Consumer
Leisure day trip	76.3%	18.3%	47.1%	37.4%	44.5%	55.5%	37.0%	47.2%	62.1%
Vacation	1.8%	41.0%	22.0%	27.7%	20.7%	16.0%	27.5%	20.2%	11.9%
Weekend getaway	9.4%	19.2%	15.1%	17.6%	12.2%	13.7%	14.5%	16.3%	8.7%
Visit family/friends	5.9%	11.2%	7.8%	9.0%	13.1%	7.8%	10.3%	8.4%	8.3%
Wedding or special event	2.2%	4.0%	2.9%	2.8%	3.9%	2.4%	3.6%	3.0%	3.6%
Business/conference/ government travel	1.0%	3.4%	2.2%	2.1%	2.2%	1.5%	3.8%	1.9%	2.1%
Other	3.4%	2.8%	3.0%	3.4%	3.4%	3.2%	3.3%	3.0%	3.2%
Base	3481	2845	5081	3474	1125	4311	1712	2527	2758

Question: Which of these best describes your trip? Base: All survey respondents. 6,326 responses.

TRIP MOTIVATORS

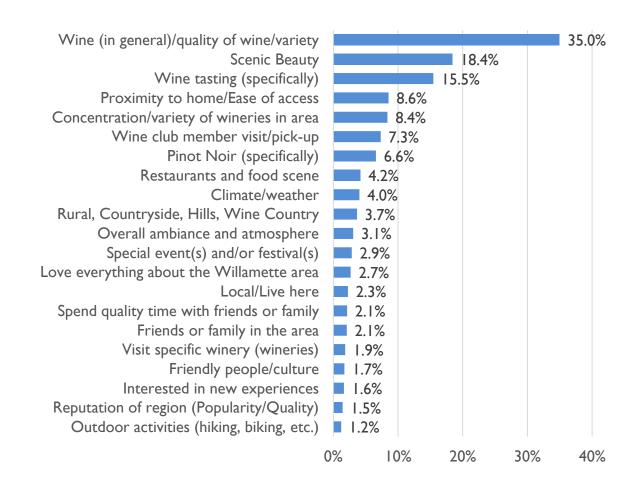
The quality/variety of wine available in the Willamette Valley, its scenic beauty and wine tasting opportunities are the primary drivers motivating visitation to the region. Wine tourists surveyed were asked, in an open-ended format, about what attributes of the Willamette Valley motivated their visit. The chart at right shows the top cited-responses. Beyond wine in general, scenic beauty and wine tasting, the next most cited trip motivators were how easily accessible the region is (8.6%), the concentration of wineries in the area (8.4%) and wine club members visiting or picking up wine at wineries (7.3%).

Interestingly, out-of-state visitors were more likely to say pinot noir specifically motivated their trip to the region (11.8% vs. 2.6% of Oregon residents).

Detail by type of visitor is presented on the following page

Question: Please think specifically about the Willamette Valley and its attributes. What qualities of the Willamette Valley motivated this visit? Base: All survey respondents. 4,537 responses.

Figure 12:Trip Motivators



TRIP MOTIVATORS BY VISITOR TYPE

Detail by Visitor Type

			NI a sella	Combuol	Caudh		Non Wine		
	Oregon		North Valley	Central Valley	South Valley	Wine Club	Non-Wine Club	Heavy Wine	Light Wine
	Resident	Out of State	Valley Visitor	Valley Visitor	Valley Visitor	Member	Member	Consumer	Consumer
Wine (in general)/quality of wine/variety	31.5%	39.5%	36.6%	37.3%	30.5%	35.3%	33.1%	36.2%	32.5%
Scenic Beauty	21.0%	15.1%	17.7%	17.0%	22.5%	17.2%	20.4%	16.8%	22.3%
Wine tasting (specifically)	16.1%	14.6%	16.1%	15.4%	10.7%	16.0%	16.3%	15.8%	14.6%
Proximity to home/Ease of access	12.3%	3.7%	7.9%	6.6%	8.9%	8.7%	8.4%	6.1%	12.7%
Concentration/variety of wineries in area	8.7%	8.0%	8.2%	9.1%	9.6%	8.1%	9.8%	8.5%	7.9%
Wine club member visit/pick-up	10.8%	2.8%	7.5%	4.2%	4.4%	10.2%	0.0%	9.4%	6.3%
Pinot Noir (specifically)	2.6%	11.8%	7.5%	8.0%	4.4%	6.2%	7.5%	8.2%	3.8%
Restaurants and food scene	3.5%	5.0%	4.5%	5.3%	3.4%	4.3%	4.3%	4.6%	3.1%
Climate/weather	5.2%	2.5%	3.5%	3.7%	6.3%	4.0%	3.7%	3.8%	5.0%
Rural, Countryside, Hills, Wine Country	2.4%	5.3%	4.0%	4.7%	3.3%	2.9%	5.7%	3.6%	3.5%
Overall ambiance and atmosphere	3.2%	2.9%	2.7%	3.0%	4.7%	3.0%	3.2%	2.4%	3.9%
Special event(s) and/or festival(s)	3.1%	2.6%	2.7%	2.9%	2.9%	3.1%	2.2%	2.8%	2.7%
Love everything about the Willamette area	1.9%	3.7%	2.8%	3.1%	3.3%	2.8%	2.7%	2.7%	2.4%
Local/Live here	3.7%	0.4%	1.7%	1.8%	4.3%	2.6%	1.2%	1.5%	3.1%
Spend quality time with friends or family	2.9%	1.2%	2.1%	2.1%	2.1%	2.2%	1.7%	1.7%	2.5%
Friends or family in the area	1.2%	3.2%	2.1%	2.1%	3.8%	1.7%	2.1%	2.6%	1.6%
Visit specific winery (wineries)	2.0%	1.7%	1.7%	1.7%	1.5%	2.2%	1.0%	2.2%	1.5%
Friendly people/culture	1.9%	1.5%	1.8%	1.5%	1.8%	1.7%	1.1%	1.7%	1.8%
Interested in new experiences	1.3%	2.1%	1.5%	1.8%	1.6%	1.4%	2.2%	1.9%	1.4%
Reputation of region (Popularity/Quality)	0.6%	2.6%	1.6%	1.7%	1.1%	0.7%	2.8%	1.4%	1.5%
Outdoor activities (hiking, biking, etc.)	0.7%	1.9%	1.2%	1.3%	2.3%	1.1%	1.8%	1.1%	1.0%

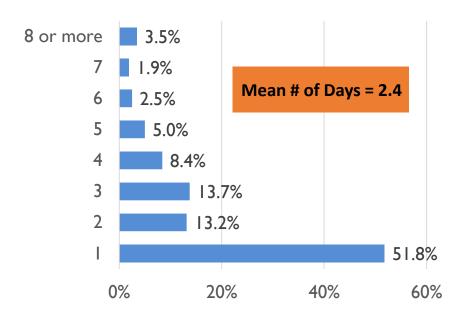
Question: Please think specifically about the Willamette Valley and its attributes. What qualities of the Willamette Valley motivated this visit?

Base: All survey respondents. 4,537 responses.

DAYS SPENT IN WILLAMETTE VALLEY

The typical wine tourist surveyed spent 2.4 days in the Willamette Valley on their trip. Out-of-state and central valley visitors reported longer lengths of stay averaging 3.3 and 3.0 days in the region, respectively.

Figure 13: Days Spent in Willamette Valley



Detail by Visitor Type

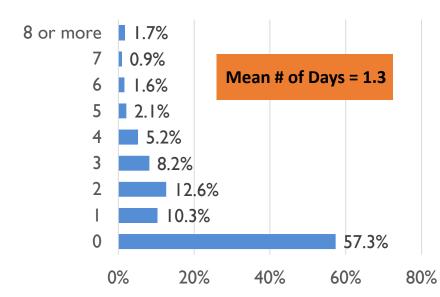
	Oregon	Out of	North Valley	Central Valley	South Valley	Wine Club	Non-Wine Club	Heavy Wine	Light Wine
	Resident	State	Visitor	Visitor	Visitor	Member	Member	Consumer	Consumer
8 or more	2.8%	4.3%	3.7%	4.5%	5.4%	4.1%	1.9%	3.7%	2.1%
7	0.8%	3.2%	2.1%	2.5%	2.4%	1.9%	1.9%	2.0%	0.9%
6	1.0%	4.2%	2.7%	3.6%	3.7%	2.3%	3.0%	2.9%	1.0%
5	1.4%	9.3%	5.7%	7.5%	6.7%	4.7%	5.9%	4.9%	2.7%
4	2.1%	15.9%	9.4%	12.7%	8.0%	7.7%	10.1%	8.5%	4.4%
3	5.4%	23.5%	15.1%	19.2%	12.2%	12.6%	16.4%	15.5%	8.7%
2	9.8%	17.1%	13.4%	15.6%	15.1%	11.8%	16.5%	15.4%	12.1%
1	76.7%	22.6%	47.9%	34.4%	46.6%	54.9%	44.2%	47.2%	68.1%
Mean	1.7	3.3	2.5	3.0	2.7	2.4	2.5	2.5	1.8
Base	3099	2642	4679	3127	990	4074	1666	2309	2465

Question: How many days did you spend in the Willamette Valley on this trip? Base: All survey respondents . 5,741 responses.

NIGHTS SPENT IN WILLAMETTE VALLEY

On average, wine tourists spent 1.3 nights in the Willamette Valley on their most recent trip. Aside from out-of-state visitors, Central valley visitors were the next most likely group to have stayed two or more nights within Willamette Valley on their most recent trip (46.8% vs. 35.9% for north valley visitors and 35.8% for south valley visitors).

Figure 14: Nights Spent in Willamette Valley



Detail by Visitor Type

	Oregon Resident	Out of State	North Valley Visitor	Central Valley Visitor	South Valley Visitor	Wine Club Member	Non-Wine Club Member	Heavy Wine Consumer	Light Wine Consumer
8 or more	0.7%	2.9%	1.8%	2.5%	3.6%	1.7%	1.6%	1.6%	1.1%
7	0.2%	1.8%	1.1%	1.4%	1.0%	1.1%	0.5%	0.9%	0.1%
6	0.2%	3.3%	1.8%	2.1%	2.3%	1.4%	2.2%	1.7%	0.8%
5	0.4%	4.3%	2.3%	3.2%	3.3%	1.9%	2.5%	2.0%	0.9%
4	1.2%	10.1%	5.9%	8.0%	6.7%	4.7%	6.4%	5.1%	2.5%
3	1.5%	16.4%	9.1%	12.2%	8.1%	7.3%	10.5%	8.0%	4.4%
2	4.9%	22.1%	13.8%	17.2%	10.8%	11.6%	15.3%	14.4%	8.2%
1	7.8%	13.4%	10.3%	12.1%	12.3%	9.0%	13.6%	11.8%	10.0%
0	83.0%	25.7%	53.8%	41.1%	51.9%	61.4%	47.3%	54.4%	71.8%
Mean	0.4	2.3	1.4	1.8	1.6	1.2	1.5	1.3	0.7
Base	3277	2657	4815	3256	1033	4240	1693	2391	2539

Question: How many nights?

Base: Respondents who stayed overnight in Willamette Valley. 2,495 responses.

DAILY IN-MARKET SPENDING

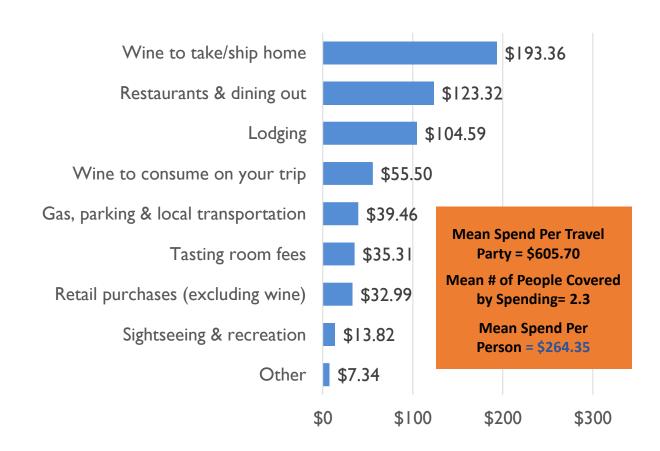
Wine tourists spent an average of \$605.70 per travel party within the Willamette Valley on their trip. This spending covered approximately 2.3 people so it is estimated that the typical wine tourist represents \$264.35 in daily in-market spending to Willamette Valley.

The largest proportions of spending were on wine to take or ship home (\$193.36), restaurants/dining (\$123.32) and lodging (\$104.59 across all visitor segments; the average hotel guest spent \$304.81 on lodging per day). Additionally, wine tourists typically spent \$55.50 per day on wine to consume during their trip.

Detail by type of visitor is presented on the following page

Question: Approximately how much you will spend in the Willamette Valley PER DAY on each? Base: All survey respondents. 6,218 responses.

Figure 15: Daily In-Market Spending



DAILY IN-MARKET SPENDING BY TYPE OF VISITOR

Detail by Visitor Type

	Oregon		North Valley	Central Valley	South Valley	Wine Club	Non-Wine Club	Heavy Wine	Light Wine
	Resident	Out of State	Visitor	Visitor	Visitor	Member	Member	Consumer	Consumer
Wine to take/ship home	\$154.17	\$247.43	\$218.67	\$210.49	\$133.64	\$213.57	\$156.70	\$267.71	\$85.03
Restaurants & dining out	\$67.72	\$194.44	\$137.98	\$158.67	\$118.26	\$120.80	\$134.21	\$135.78	\$77.34
Lodging	\$31.46	\$204.75	\$120.15	\$152.53	\$105.49	\$95.10	\$135.22	\$117.06	\$60.39
Wine to consume on your trip	\$31.00	\$85.64	\$60.94	\$70.33	\$60.38	\$56.06	\$53.61	\$60.19	\$34.71
Gas, parking & local transportation	\$21.29	\$61.88	\$43.26	\$49.82	\$45.59	\$38.09	\$42.09	\$41.72	\$25.90
Tasting room fees	\$23.69	\$49.56	\$40.07	\$40.92	\$26.27	\$32.37	\$40.39	\$37.66	\$26.99
Retail purchases (excluding wine)	\$15.49	\$54.61	\$36.39	\$44.86	\$44.73	\$31.48	\$37.86	\$35.03	\$20.34
Sightseeing & recreation	\$4.05	\$25.79	\$15.68	\$19.64	\$18.99	\$11.72	\$19.50	\$15.49	\$8.11
Other	\$2.98	\$12.69	\$8.31	\$9.63	\$9.92	\$6.71	\$9.49	\$7.22	\$5.38
Mean Spend per Travel Party	\$351.85	\$936.78	\$681.43	\$756.91	\$563.28	\$605.91	\$629.08	\$717.86	\$344.20
# of People Covered by Spending	2.3	2.2	2.3	2.3	2.3	2.3	2.2	2.3	2.2
Mean Spend per Person	\$151.31	\$416.43	\$295.45	\$330.65	\$246.49	\$259.48	\$289.51	\$311.41	\$158.84
Base	3293	2215	4320	2874	1003	3703	1525	2274	2631

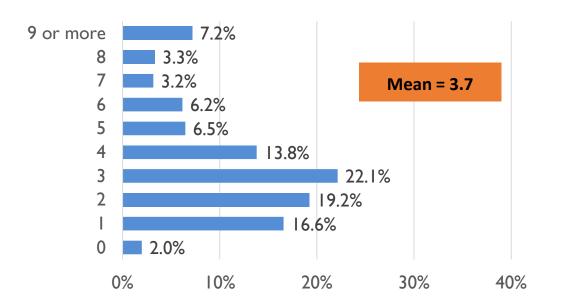
Question: Approximately how much you will spend in the Willamette Valley PER DAY on each? Base: All survey respondents. 6,218 responses.

WINERIES & TASTING ROOMS VISITED

On average, wine tourists visited 3.7 wineries and approximately one stand alone tasting room during their time in the Willamette Valley. A majority of respondents visited at least one winery during their trip (98.0%) while four-in-ten (40.8%) went to at least one stand-alone tasting room.

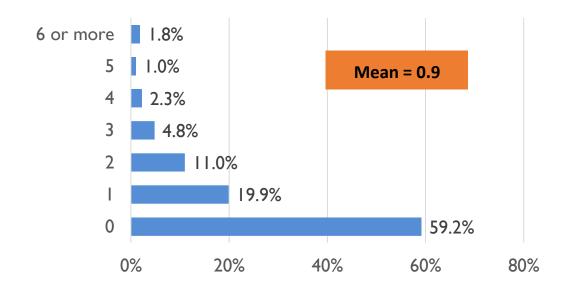
Detail by type of visitor is presented on the following page.

Figure 16a: Wineries Visited



Question: How many Willamette Valley wineries and stand-alone tasting rooms will you visit on this trip? Base: All survey respondents. 6,326 responses.

Figure 16b:Tasting Rooms Visited



WINERIES & TASTING ROOMS VISITED BY TYPE OF VISITOR

Out-of-state visitors, central valley visitors, non-wine club members and heavy wine consumers were much more likely than others to visit standalone tasting rooms during their time in the Willamette Valley. Additionally, out-of-state visitors, central valley visitors and heavy wine consumers were the groups who visited the most wineries in the Willamette Valley (averaging 5.0, 4.5 and 4.0, respectively).

WINERIES	Orogon	Out of	North Valley	Central Valley	South Valley	Wine Club	Non-Wine Club	Heavy Wine	Light Wine
VINERIES	Oregon Resident	State	Valley	Valley Visitor	Valley Visitor	Member	Member	Consumer	Consumer
5 or more	10.3%	46.4%	30.9%	38.8%	24.0%	26.2%	28.1%	29.7%	10.8%
4	13.1%	14.7%	15.0%	15.0%	11.3%	13.6%	14.4%	16.6%	11.9%
3	25.4%	18.0%	23.6%	19.3%	18.1%	22.1%	22.4%	24.1%	23.9%
2	25.4%	11.4%	17.4%	14.4%	21.0%	20.4%	16.3%	16.7%	26.4%
1	23.5%	7.8%	11.5%	10.8%	22.4%	16.1%	15.4%	12.1%	25.3%
0	2.2%	1.7%	1.5%	1.7%	3.2%	1.6%	3.4%	0.8%	1.7%
Mean	2.7	5.0	4.1	4.5	3.4	3.7	3.8	4.0	2.7
Base	3442	2724	4928	3332	1102	4193	1671	2478	2739

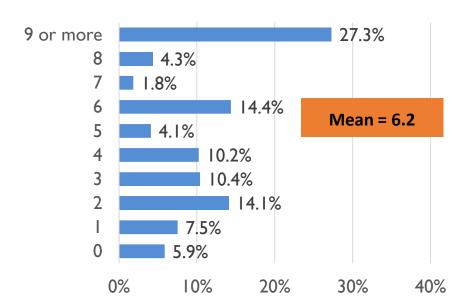
TASTING ROOMS VISITED	Oregon Resident	Out of State	North Valley Visitor	Central Valley Visitor	South Valley Visitor	Wine Club Member	Non-Wine Club Member	Heavy Wine Consumer	Light Wine Consumer
5 or more	1.7%	4.3%	3.3%	4.4%	2.3%	2.6%	3.0%	3.4%	0.9%
4	1.4%	3.3%	2.6%	3.1%	2.4%	2.1%	2.2%	2.4%	1.3%
3	3.5%	6.4%	5.4%	6.2%	4.1%	4.3%	4.7%	5.2%	3.8%
2	7.8%	14.9%	12.2%	13.7%	10.2%	10.8%	11.0%	11.5%	8.4%
1	19.5%	20.4%	19.8%	20.7%	21.2%	19.0%	22.1%	20.9%	20.3%
0	66.1%	50.7%	56.6%	51.9%	59.7%	61.2%	57.0%	56.7%	65.2%
Mean	0.6	1.1	1.0	1.1	0.8	0.8	0.9	0.9	0.6
Base	3481	2845	5081	3475	1125	4311	1712	2527	2759

Question: How many Willamette Valley wineries and stand-alone tasting rooms will you visit on this trip? Base: All survey respondents. 6,326 responses.

BOTTLES OF WINE PURCHASED

On average, wine tourists purchased 6.2 bottles of wine at the wineries or stand-alone tasting rooms they visited. North and central valley visitors purchased more wine bottles on their trip compared to south valley visitors (6.7 and 6.8 vs. 5.3, respectively). The typical heavy wine consumer purchased 10.4 Willamette Valley wine bottles on their most recent trip. Less than 6 percent did not purchase a bottle of wine.

Figure 17: Bottles of Wine Purchased



Detail by Visitor Type

	Oregon Resident	Out of State	North Valley Visitor	Central Valley Visitor	South Valley Visitor	Wine Club Member	Non-Wine Club Member	Heavy Wine Consumer	Light Wine Consumer
9 or more	19.2%	39.6%	30.7%	32.2%	20.7%	30.2%	22.5%	57.1%	0.0%
8	4.3%	4.3%	4.7%	4.5%	3.3%	4.8%	3.5%	9.0%	0.0%
7	1.7%	2.0%	2.0%	1.8%	1.4%	1.7%	2.2%	3.8%	0.0%
6	14.7%	13.8%	15.2%	13.7%	11.3%	16.0%	10.9%	30.0%	0.0%
5	4.3%	3.8%	4.2%	4.3%	3.9%	4.2%	4.2%	0.0%	7.8%
4	11.5%	8.3%	9.7%	9.9%	11.4%	10.3%	10.3%	0.0%	19.6%
3	11.7%	8.4%	9.8%	9.4%	12.7%	10.3%	11.1%	0.0%	19.9%
2	17.4%	9.1%	12.0%	12.3%	20.6%	12.5%	16.9%	0.0%	27.0%
1	9.3%	4.8%	6.3%	6.4%	9.8%	5.7%	10.7%	0.0%	14.4%
0	5.8%	5.9%	5.4%	5.6%	4.9%	4.4%	7.7%	0.0%	11.2%
Mean	5.3	7.6	6.7	6.8	5.3	6.7	5.4	10.4	2.5
Base	3182	2104	4115	2710	967	3493	1501	2527	2759

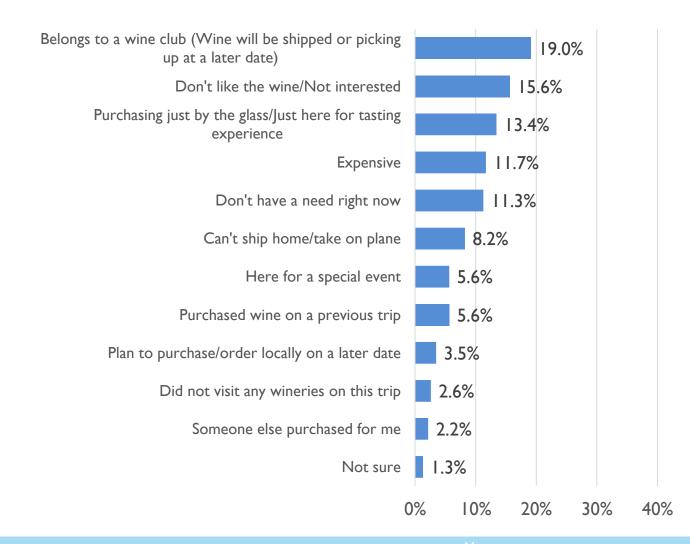
Question: On this visit, how many bottles of wine will you buy at these wineries or stand-alone tasting rooms? Base: All survey respondents. 5,286 responses.

REASONS FOR NOT PURCHASING WINE

Of the less than 6 percent of wine tourists who did not purchase wine during their visit, one fifth of this group are wine club members who would be receiving their wines at later date. For others, 15.6 percent cited not being interested in or not liking the wine (15.6%). In an openended question, respondents who did not purchase wine during their most recent trip to the Willamette Valley were asked to provide their reasons for not doing so. The chart at right shows the top-cited responses amongst this group. Additional top responses include only being in the region for the wine tasting experience (13.4%), feeling that purchasing wine was too expensive (11.7%) and/or feeling they did not have an immediate need to purchase wine (11.3%).

Question: What are your reasons for not purchasing bottles of wine on this visit? Base: Respondents who did not buy bottles of wine. 231 responses.

Figure 18: Reasons for Not Purchasing Wine



REASONS FOR NOT PURCHASING WINE BY TYPE OF VISITOR

Detail by Visitor Type

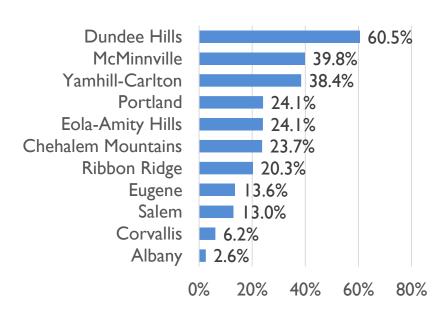
	Oregon	Out	North Valley	Central Valley	South Valley	Wine Club	Non-Wine Club	Light Wine
	Resident	of State	Valley	Valley Visitor	Valley Visitor	Member	Member	Consumer
Belongs to a wine club (Wine will be shipped or picking up at a later date)	20.6%	16.8%	21.8%	12.0%	19.4%	32.5%	3.2%	19.0%
Don't like the wine/Not interested	15.4%	15.8%	16.8%	19.4%	6.5%	13.0%	20.0%	15.6%
Purchasing just by the glass/Just here for tasting experience	16.9%	8.4%	11.2%	13.0%	25.8%	13.0%	11.6%	13.4%
Expensive	12.5%	10.5%	11.7%	11.1%	6.5%	3.3%	22.1%	11.7%
Don't have a need right now	14.7%	6.3%	10.6%	8.3%	3.2%	12.2%	10.5%	11.3%
Can't ship home/take on plane	0.7%	18.9%	8.4%	11.1%	16.1%	3.3%	13.7%	8.2%
Here for a special event	5.9%	5.3%	5.6%	4.6%	9.7%	4.1%	8.4%	5.6%
Purchased wine on a previous trip	4.4%	7.4%	5.6%	7.4%	3.2%	6.5%	4.2%	5.6%
Plan to purchase/order locally on a later date	1.5%	6.3%	2.2%	4.6%	6.5%	3.3%	4.2%	3.5%
Did not visit any wineries on this trip	2.9%	2.1%	3.4%	1.9%	3.2%	4.1%	1.1%	2.6%
Someone else purchased for me	2.9%	1.1%	1.1%	3.7%	0.0%	3.3%	1.1%	2.2%
Not sure	1.5%	1.1%	1.7%	2.8%	0.0%	1.6%	0.0%	1.3%
Base	136	95	179	108	31	123	95	231

Question: What are your reasons for not purchasing bottles of wine on this visit? Base: Respondents who did not buy bottles of wine. 231 responses.

WILLAMETTE VALLEY AREAS VISITED

Wine tourists most commonly reported visiting Dundee Hills (60.5%), McMinnville (39.8%) and Yamhill-Carlton (38.4%) during their Willamette Valley trip. Non-wine club members were more likely to have visited McMinnville (46.9% vs. 37.8%) and Portland (32.0% vs. 20.6%) compared to their counterparts. Meanwhile, light wine consumers were more likely to have visited Eugene (18.5% vs. 9.7%) compared to heavy wine consumers. In contrast, heavy wine consumers were more likely to have visited Ribbon Ridge (21.6% vs. 12.3% for light wine consumers).

Figure 19: Willamette Valley Areas Visited



Detail by Visitor Type

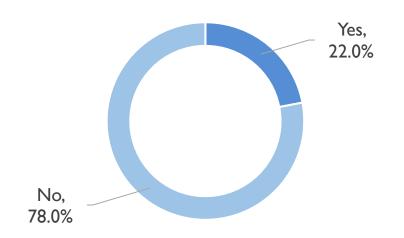
	0	0.4.4	North	Central	South	Wine	Non-Wine	,	Light
	Oregon Resident	Out of State	Valley Visitor	Valley Visitor	Valley Visitor	Club Member	Club Member	Wine Consumer	Wine Consumer
Dundee Hills	51.2%	71.8%	75.3%	64.6%	29.3%	63.2%	57.1%	67.7%	47.4%
McMinnville	25.7%	57.0%	43.4%	72.4%	32.4%	37.8%	46.9%	41.8%	30.1%
Yamhill-Carlton	30.7%	47.9%	47.8%	45.5%	19.7%	41.5%	35.2%	41.0%	26.9%
Portland	7.6%	44.3%	30.0%	31.1%	27.5%	20.6%	32.0%	25.6%	17.8%
Eola-Amity Hills	19.9%	29.1%	24.7%	43.8%	20.2%	24.8%	24.6%	24.3%	17.3%
Chehalem Mountains	18.9%	29.7%	29.6%	24.6%	11.9%	24.4%	21.8%	24.7%	18.0%
Ribbon Ridge	16.1%	25.5%	25.3%	22.5%	8.3%	23.3%	15.6%	21.6%	12.3%
Eugene	15.9%	10.8%	6.0%	9.5%	76.3%	13.3%	14.4%	9.7%	18.5%
Salem	11.0%	15.4%	10.1%	23.6%	20.5%	11.4%	14.7%	11.2%	12.8%
Corvallis	4.1%	8.8%	5.6%	8.8%	34.8%	5.5%	8.1%	6.3%	5.6%
Albany	1.8%	3.5%	2.1%	4.7%	8.6%	2.2%	3.0%	2.3%	2.5%
Base	3481	2845	5081	3475	1125	4311	1712	2527	2759

Question: Which towns or areas of the Willamette Valley will you visit on this trip? Base: All survey respondents. 6,326 responses.

OTHER VISITED DESTINATIONS ON TRIP

Just under a quarter of wine tourists visited other destinations outside the Willamette Valley on their trip (22.0%). Out-of-state visitors (40.3%), central valley visitors (28.5%), non-wine club members (32.0%) and heavy wine consumers (24.2%) were the likeliest groups to have visited other destinations outside the Willamette Valley as part of their trip.

Figure 20: Other Visited Destinations on Trip



Detail by Visitor Type

	Oregon Resident	Out of State	North Valley Visitor	Central Valley Visitor	South Valley Visitor	Wine Club Member	Non-Wine Club Member	Heavy Wine Consumer	Light Wine Consumer
Yes	7.3%	40.3%	23.7%	28.5%	25.5%	18.0%	32.0%	24.2%	17.3%
No	92.7%	59.7%	76.3%	71.5%	74.5%	82.0%	68.0%	75.8%	82.7%
Base	3335	2688	4877	3323	1073	4311	1712	2425	2569

Question: Did you visit any other destinations outside the Willamette Valley on this trip? Base: All survey respondents. 6,023 responses.

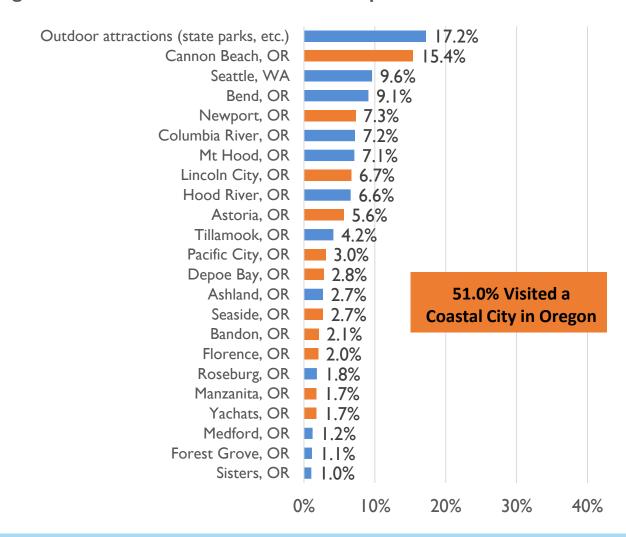
OTHER VISITED DESTINATIONS ON TRIP

The 22.0 percent of Willamette Valley wine tourists who ventured outside the area on their trip most commonly did so to visit regional outdoor attractions such as state/national parks (17.2%) and Cannon Beach (15.4%). In an open-ended question, respondents who said they had visited other destinations outside the Willamette Valley on their trip were asked to specify where they went. The chart at right shows the top cited responses. Following outdoor attractions and Cannon Beach, one-in-ten respondents from this group also visited Seattle, WA (9.6%) and/or Bend, OR (9.1%).

Half of respondents from this group visited a coastal city/town in Oregon as part of their Willamette Valley trip (51.0%).

Question: Will you visit any other destinations outside the Willamette Valley on this trip? If so, which? Base: Respondents who visited other destinations on this trip. I,443 responses.

Figure 21: Other Visited Destinations on Trip



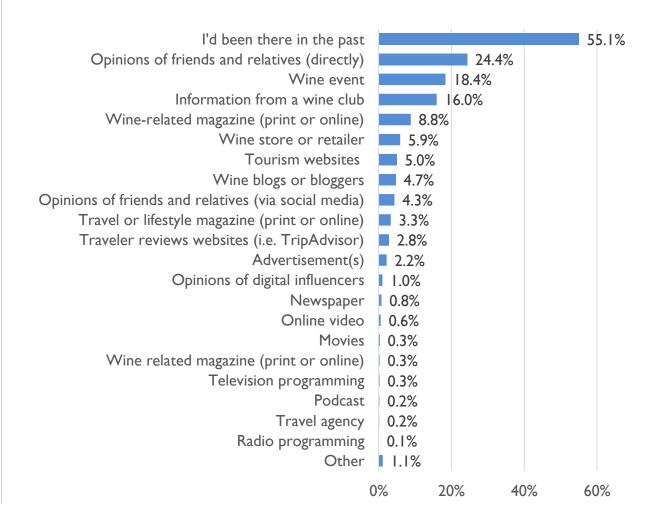
TRIP INSPIRATION

Indicative of a positive visitor experience, the top reason wine tourists gave as their reason for being in Willamette Valley was they had visited previously and were inspired to return. When asked what inspired this most recent trip to the area, over half of respondents (55.1%) said they had been to Willamette Valley previously. Adding to this indicator of a positive experience with Willamette Valley, nearly one quarter were visiting because of the opinions of friends or family (24.4%). or a wine event (18.4%) inspired this trip.

Detail by type of visitor is presented on the following page

Question: Which of the following inspired you to make this visit to the Willamette Valley? Base: All survey respondents. 6,326 responses.

Figure 22:Trip Inspiration



TRIP INSPIRATION BY TYPE OF TRAVELER

			North	Central	South	Wine	Non-Wine	Ноэм	Light
	Oregon	Out of	Valley	Valley	Valley	Club	Club	Heavy Wine	Wine
	Resident	State	Visitor	Valley	Valley	Member			Consumer
I'd been there in the past	61.0%	47.8%	55.3%	54.0%	55.3%	60.5%	45.0%	56.3%	53.2%
Opinions of friends and relatives (directly, face to face)	21.1%	28.4%	25.7%	26.6%	23.6%	21.1%	32.1%	24.9%	23.5%
Wine event	24.0%	11.4%	18.8%	17.0%	13.4%	22.4%	9.2%	21.3%	15.7%
Information from a wine club	21.7%	8.9%	16.3%	13.1%	14.3%	21.7%	3.3%	18.0%	14.5%
Wine-related magazine (print or online)	5.2%	13.2%	10.1%	12.4%	7.6%	8.8%	10.4%	9.1%	5.9%
Wine store or retailer	3.9%	8.5%	6.3%	7.7%	6.5%	5.2%	7.5%	6.6%	4.3%
Tourism websites (official website of a local visitors or convention bureau or chamber of commerce)	2.0%	8.8%	5.6%	6.7%	5.8%	3.4%	9.9%	5.6%	4.1%
Wine blogs or bloggers	2.4%	7.5%	5.4%	6.4%	4.4%	4.1%	6.3%	5.2%	3.3%
Opinions of friends and relatives (via social media)	4.0%	4.8%	4.5%	5.1%	5.6%	3.9%	5.6%	4.1%	4.6%
Travel or lifestyle magazine (print or online)	1.9%	5.1%	3.7%	4.5%	4.4%	2.4%	5.1%	3.9%	2.8%
Traveler reviews websites (i.e. TripAdvisor)	0.9%	5.3%	3.2%	3.8%	4.3%	1.8%	5.1%	3.2%	2.3%
Advertisement(s)	2.2%	2.2%	2.1%	2.6%	3.0%	1.6%	3.6%	1.9%	2.6%
Opinions of digital influencers	0.8%	1.3%	1.1%	1.0%	1.1%	0.8%	1.5%	1.0%	1.0%
Newspaper	0.7%	0.8%	0.7%	0.9%	1.1%	0.6%	1.3%	0.6%	0.9%
Online video	0.4%	0.8%	0.6%	0.9%	0.4%	0.3%	0.9%	0.6%	0.5%
Movies	0.1%	0.6%	0.4%	0.4%	0.4%	0.3%	0.5%	0.3%	0.3%
Wine related magazine (print or online)	0.1%	0.4%	0.3%	0.3%	0.3%	0.0%	0.0%	0.3%	0.3%
Television programming	0.1%	0.4%	0.3%	0.3%	0.3%	0.2%	0.4%	0.3%	0.3%
Podcast	0.1%	0.4%	0.3%	0.4%	0.2%	0.2%	0.3%	0.2%	0.1%
Travel agency	0.0%	0.4%	0.2%	0.2%	0.2%	0.2%	0.1%	0.2%	0.1%
Radio programming	0.2%	0.0%	0.1%	0.1%	0.1%	0.0%	0.3%	0.1%	0.1%
Other:	0.7%	1.6%	0.9%	1.2%	1.2%	0.0%	0.0%	1.0%	1.6%
Base	3481	2845	5081	3475	1125	4311	1712	2527	2759

Question: Which of the following inspired you to make this visit to the Willamette Valley?

Base: All survey respondents. 6,326 responses.

RESOURCES USED TO SELECT WINERIES/TASTING ROOMS

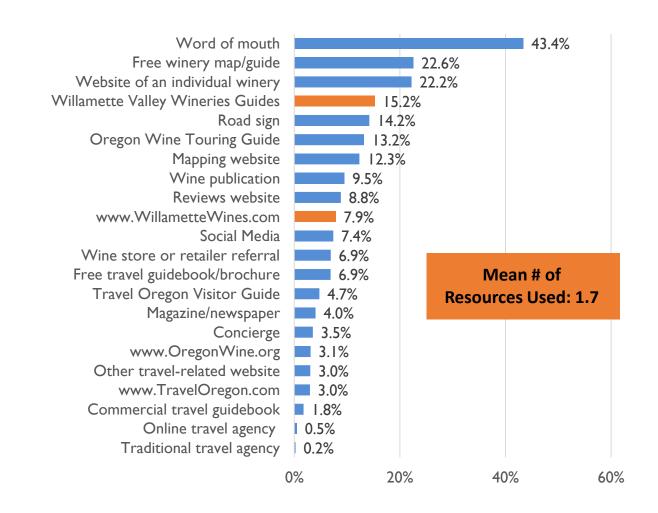
The average wine tourist used 1.7 different resources to select wineries and tasting rooms to visit within the Willamette Valley—top amongst these were word of mouth (43.4%), free winery maps (22.6%) and the website of an individual winery (22.2%).

Additionally, 15.2 percent of visitors surveyed turned to the Willamette Valley Wineries Guides and 7.9 percent used the official website of the Willamette Valley Winery Association as resources for selecting wineries/tasting rooms.

Detail by type of visitor is presented on the following page

Question: Which of these resources did you use to select the wineries and tasting rooms you will visit during this trip? Base: All survey respondents. 6,277 responses.

Figure 23: Resources Used to Select Wineries/Tasting Rooms



RESOURCES USED TO SELECT WINERIES/TASTING ROOMS BY TYPE OF TRAVELER

	Oregon Resident	Out of State	North Valley Visitor	Central Valley Visitor	South Valley Visitor	Wine Club Member	Non-Wine Club Member	Wine	Light Wine Consumer
Word of mouth (recommendation from friend/family, local resident, etc.)	40.9%	46.5%	44.8%	45.1%	41.6%	42.9%	43.5%	43.8%	40.8%
Free winery map/guide	17.6%	28.7%	24.1%	29.5%	24.8%	22.5%	25.7%	23.5%	18.1%
Website of an individual winery	19.3%	25.8%	23.1%	24.6%	20.6%	23.3%	20.9%	23.4%	17.4%
Willamette Valley Wineries Guides	8.4%	23.6%	17.2%	20.2%	14.1%	14.6%	19.6%	16.7%	10.5%
Road sign	15.9%	12.2%	14.0%	15.3%	18.1%	14.4%	14.8%	14.1%	14.6%
Oregon Wine Touring Guide	6.9%	21.0%	14.6%	18.0%	14.7%	12.2%	18.1%	15.2%	8.7%
Mapping website (i.e. Google Maps)	10.1%	15.1%	13.0%	14.3%	12.6%	11.1%	15.2%	12.0%	11.0%
Wine publication (Wine Spectator, Wine & Spirits, etc.)	4.9%	15.2%	11.0%	13.0%	7.9%	9.8%	9.1%	9.9%	4.6%
Reviews website (i.e. Yelp, TripAdvisor)	5.0%	13.5%	10.1%	11.2%	8.3%	7.4%	12.7%	10.1%	6.5%
www.WillametteWines.com	3.8%	12.8%	8.9%	10.8%	7.3%	7.1%	9.5%	7.9%	5.9%
Social Media	8.1%	6.5%	7.1%	7.9%	9.6%	6.7%	8.5%	7.4%	7.9%
Wine store or retailer referral	4.7%	9.5%	7.6%	8.4%	6.3%	6.6%	7.6%	7.4%	4.8%
Free travel guidebook/brochure	4.1%	10.2%	7.4%	9.4%	8.9%	5.7%	10.1%	6.6%	5.6%
Travel Oregon Visitor Guide	2.0%	8.1%	5.2%	6.5%	6.7%	3.6%	8.4%	4.9%	3.9%
Magazine/newspaper	3.2%	5.1%	4.4%	5.4%	3.9%	3.9%	4.5%	4.0%	3.3%
Concierge	1.1%	6.4%	4.0%	4.8%	2.7%	3.2%	4.6%	3.5%	2.1%
www.OregonWine.org	1.1%	5.5%	3.6%	4.4%	3.6%	2.9%	4.2%	3.5%	2.0%
Other travel-related website	0.9%	5.6%	3.4%	3.9%	4.1%	2.4%	4.7%	3.6%	2.0%
www.TravelOregon.com	1.7%	4.5%	3.2%	4.5%	4.3%	2.6%	4.5%	3.6%	2.2%
Commercial travel guidebook (i.e. Lonely Planet)	0.7%	3.1%	1.9%	2.3%	2.4%	1.4%	2.7%	1.8%	1.2%
Online travel agency (i.e. Expedia, Priceline)	0.1%	1.0%	0.5%	0.6%	0.9%	0.3%	0.8%	0.5%	0.5%
Traditional travel agency	0.0%	0.5%	0.3%	0.3%	0.2%	0.3%	0.1%	0.2%	0.1%
Mean # of Resources Used	1.5	1.8	2.3	2.6	2.2	2.0	2.5	2.2	1.7
Base	3455	2822	5051	3451	1107	4293	1681	2527	2759

Question: Which of these resources did you use to select the wineries and tasting rooms you will visit during this trip?

Base: All survey respondents. 6,277 responses.

ACTIVITIES IN WILLAMETTE VALLEY

Wine tourists typically participated in 2.4 different activities during their trip to the Willamette Valley—top amongst these were wine tasting (85.5%), dining in restaurants (59.0%), winery tours (29.2%) and shopping (21.7%).

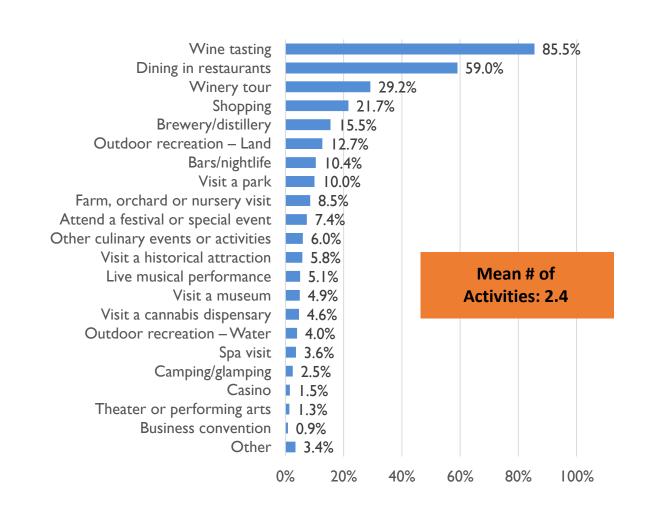
Non-wine club members and heavy wine consumers participated in more activities during their trip averaging 3.5 and 3.1, respectively compared to their counterparts who typically participated in less than three activities on average.

Central valley visitors were more likely to have dined in restaurants (69.6%) and taken a winery tour (38.2%) during their trip while south valley visitors were more likely to have visited a brewery/distillery (26.2%).

Detail by type of visitor is presented on the following page

Question: Which of these activities will you participate in while in the Willamette Valley? Please only include the activities that you have done or will do on THIS trip. Base: All survey respondents. 6,326 responses.

Figure 24: Activities in Willamette Valley



ACTIVITIES IN WILLAMETTE VALLEY BY TYPE OF VISITOR

			North	Central	South	Wine	Non-Wine	Heavy	Light
	Oregon	Out of	Valley	Valley	Valley	Club	Club	Wine	Wine
	Resident	State	Visitor	Visitor	Visitor	Member			Consumer
Wine tasting	82.3%	89.5%	87.6%	88.0%	80.4%	86.2%	83.4%	88.1%	81.8%
Dining in restaurants	45.2%	75.9%	62.9%	69.6%	58.0%	56.5%	65.1%	62.4%	49.0%
Winery tour	16.9%	44.1%	32.6%	38.2%	27.6%	28.6%	32.3%	31.1%	19.2%
Shopping	13.7%	31.4%	22.6%	28.2%	29.9%	19.6%	27.2%	21.8%	18.1%
Brewery/distillery	11.0%	21.0%	15.9%	20.0%	26.2%	14.0%	18.8%	15.8%	13.9%
Outdoor recreation – Land (biking, cycling, hiking, golf, horseback riding, etc.)	7.4%	19.1%	13.0%	16.0%	19.2%	11.0%	15.7%	13.1%	10.6%
Bars/nightlife	5.8%	16.1%	11.1%	14.2%	15.0%	8.9%	13.9%	11.4%	7.8%
Visit a park	5.0%	16.1%	10.3%	13.3%	16.2%	7.9%	15.2%	10.1%	8.6%
Farm, orchard or nursery visit (non-winery)	6.7%	10.8%	9.0%	11.3%	11.4%	7.3%	11.6%	8.3%	8.4%
Attend a festival or special event	7.3%	7.5%	7.6%	8.6%	8.4%	8.0%	6.4%	7.8%	6.5%
Other culinary events or activities	5.0%	7.2%	6.5%	7.7%	6.2%	6.0%	6.4%	5.7%	4.5%
Visit a historical attraction	2.6%	9.8%	6.3%	8.5%	11.2%	4.4%	9.5%	6.5%	4.6%
Live musical performance	5.7%	4.3%	4.4%	5.8%	10.4%	4.8%	5.4%	4.4%	5.5%
Visit a museum	2.2%	8.2%	5.5%	7.1%	6.2%	4.1%	7.1%	5.3%	2.8%
Visit a cannabis dispensary	2.2%	7.6%	5.2%	6.0%	5.7%	3.8%	7.0%	4.7%	3.9%
Outdoor recreation – Water (fishing, swimming, canoeing/kayaking, etc.)	2.8%	5.5%	4.0%	5.2%	8.1%	3.4%	5.5%	3.9%	3.4%
Spa visit	2.2%	5.3%	4.2%	4.9%	4.2%	3.6%	3.9%	3.6%	2.1%
Camping/glamping	2.0%	3.1%	2.4%	3.5%	5.0%	2.1%	3.3%	2.5%	2.3%
Casino	1.8%	1.3%	1.5%	2.1%	2.8%	1.3%	1.8%	1.5%	1.6%
Theater or performing arts	1.2%	1.5%	1.3%	1.8%	3.5%	1.2%	1.7%	1.4%	1.2%
Business convention	0.3%	1.6%	0.9%	1.0%	1.5%	0.8%	1.2%	0.8%	0.9%
Other	3.1%	3.8%	3.0%	3.3%	6.1%	3.5%	3.8%	3.2%	3.9%
Mean # of Activities	2.2	2.5	3.2	3.6	3.6	2.9	3.5	3.1	2.6
Base	3481	2845	5081	3475	1125	4311	1712	2527	2759

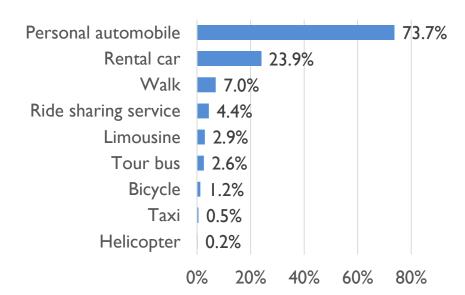
Question: Which of these activities will you participate in while in the Willamette Valley? Please only include the activities that you have done or will do on THIS trip.

Base: All survey respondents. 6,326 responses.

MODES OF TRANSPORTATION USED

The most utilized mode of transportation in the Willamette Valley was a personal automobile (73.7%) followed by a rental car (23.9%). Out-of-state visitors were more likely than Oregon residents to walk and/or use a ride sharing service to travel around Willamette Valley during their trip. Central valley visitors, non-wine club members and heavy wine consumers were the most likely segments to have also used a rental car in-market (33.1%, 32.1% and 26.4%, respectively). For visitors who walked to get around the Willamette Valley, the top areas visited were Dundee Hills (66.4%) and McMinnville (65.7%).

Figure 25: Modes of Transportation Used



Detail by Visitor Type

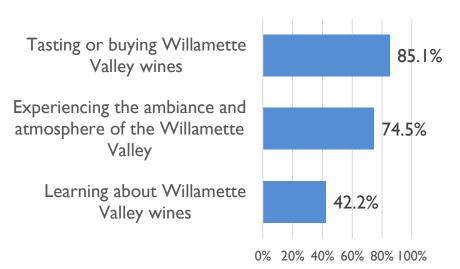
	Oregon Resident	Out of State	North Valley Visitor	Central Valley Visitor	South Valley Visitor	Wine Club Member	Non-Wine Club Member	Heavy Wine Consumer	Light Wine Consumer
Personal automobile	96.6%	45.7%	70.0%	65.7%	76.0%	77.9%	63.9%	71.3%	82.8%
Rental car	1.5%	51.4%	27.7%	33.1%	23.2%	20.7%	32.1%	26.4%	14.6%
Walk	3.8%	10.8%	7.6%	9.8%	8.9%	5.7%	10.9%	7.3%	5.4%
Uber/Lyft or other ride sharing service	1.8%	7.6%	5.0%	5.6%	4.8%	4.1%	5.2%	4.7%	2.7%
Limousine	1.6%	4.5%	3.3%	3.1%	2.4%	3.0%	2.9%	2.8%	1.2%
Tour bus	1.4%	4.0%	2.9%	2.6%	2.0%	1.9%	3.9%	3.0%	1.8%
Bicycle	0.9%	1.6%	1.3%	1.6%	2.7%	1.1%	1.6%	1.5%	0.9%
Taxi	0.1%	0.9%	0.5%	0.7%	0.7%	0.4%	0.8%	0.4%	0.4%
Helicopter	0.1%	0.3%	0.2%	0.2%	0.4%	0.2%	0.2%	0.1%	0.3%
Base	3481	2845	5081	3475	1125	4311	1712	2527	2759

Question: Which modes of transportation will you use in the Willamette Valley during this trip? Base: All survey respondents. 6,326 responses.

IMPORTANT TRIP DECISION FACTORS

Tasting/buying Willamette Valley wines and experiencing the ambiance of the region were considered important to the decision to visit the area's wineries. Although four-in-ten respondents also felt that learning about Willamette Valley wines was important to their decision to visit, it was the comparatively least important experience tested. Even so, out-of-state visitors and non-wine club members were the most likely groups to say learning about the region's wines was important to their decision to visiting wineries in the area (51.0% and 48.3%, respectively).

Figure 26: Important Trip Decision Factors



Detail by Visitor Type

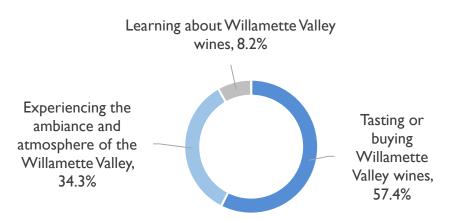
	Oregon Resident	Out of State	North Valley Visitor	Central Valley Visitor	South Valley Visitor	Wine Club Member	Non-Wine Club Member	Wine	Light Wine Consumer
Tasting or buying Willamette Valley wines	84.2%	86.2%	87.1%	85.8%	78.0%	88.3%	82.1%	89.2%	78.5%
Experiencing the ambiance and atmosphere of the Willamette Valley	73.1%	76.2%	76.1%	75.9%	72.7%	75.3%	76.7%	73.8%	74.6%
Learning about Willamette Valley wines	35.1%	51.0%	45.1%	47.5%	35.7%	41.8%	48.3%	44.3%	36.0%
Base	3469	2832	5076	3468	1124	4311	1712	2522	2739

Question: Which of the following were important to your decision to visit wineries in the Willamette Valley? (Select all that apply) Base: All survey respondents. 6,301 responses.

MOST IMPORTANT TRIP DECISION FACTOR

By far, tasting and/or buying Willamette Valley wines was considered the most important factor in visiting the region's wineries. When asked which of the three experiences was considered the most important to the destination decision process, over half (57.4%) of all wine tourists surveyed said buying/tasting Willamette Valley wines.

Figure 27: Most Important Trip Decision Factor



Detail by Visitor Type

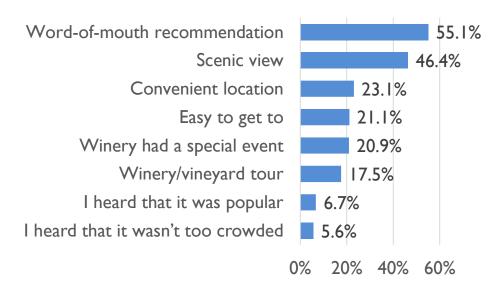
	Oregon Resident	Out of State	North Valley Visitor	Central Valley Visitor	South Valley Visitor	Wine Club Member		Wine	Light Wine Consumer
Tasting or buying Willamette Valley wines	56.2%	58.9%	58.5%	56.8%	52.8%	60.9%	50.1%	62.2%	49.2%
Experiencing the ambiance and atmosphere of the Willamette Valley	36.9%	31.3%	33.0%	33.9%	38.9%	32.1%	38.6%	29.6%	42.8%
Learning about Willamette Valley wines	6.9%	9.8%	8.6%	9.3%	8.3%	7.0%	11.3%	8.2%	8.1%
Base	3411	2800	5016	3417	1104	4243	1690	2487	2703

Question: Which of these was the most important? Base: All survey respondents. 6,211 responses.

IMPORTANT TO VISITING SPECIFIC WINERIES/TASTING ROOMS

Word-of-mouth recommendations (55.1%) and scenic views (46.4%) were the most important factors to wine tourists' decision to visit specific wineries/tasting rooms. Word-of-mouth recommendations and winery tours were more likely to be considered important factors to out-of-state visitors while scenic views, accessibility and special events were more important to Oregon residents.

Figure 28: Important to Visiting Specific Wineries



Detail by Visitor Type

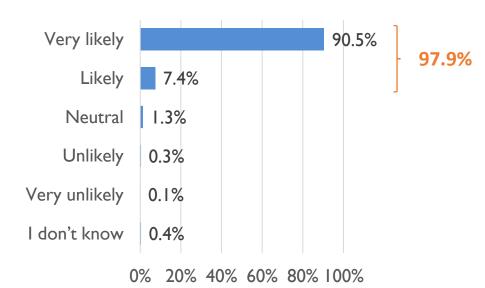
	Oregon Resident	Out of State	North Valley Visitor	Central Valley Visitor	South Valley Visitor	Wine Club Member		Wine	Light Wine Consumer
Word-of-mouth recommendation	48.0%	63.9%	58.7%	60.0%	48.1%	53.5%	59.1%	56.2%	50.9%
Scenic view	49.7%	42.3%	45.3%	45.5%	53.2%	46.4%	46.4%	44.5%	50.5%
Convenient location	26.0%	19.4%	20.7%	21.5%	31.9%	22.5%	24.6%	20.3%	28.3%
Easy to get to	25.3%	15.9%	18.7%	19.6%	27.2%	20.9%	21.7%	19.3%	25.9%
Winery had a special event	28.5%	11.5%	20.9%	17.9%	16.3%	25.5%	9.3%	23.1%	19.7%
Winery/vineyard tour	10.5%	26.3%	19.4%	21.0%	16.6%	16.7%	19.6%	18.9%	12.1%
I heard that it was popular	5.4%	8.3%	6.9%	7.6%	8.0%	6.0%	8.5%	7.3%	6.2%
I heard that it wasn't too crowded	6.1%	4.9%	5.5%	6.0%	6.7%	5.6%	5.5%	5.4%	5.7%
Base	3335	2688	4877	3323	1073	4311	1712	2425	2569

Question: Which of the following were important to your decision to visit specific wineries/tasting rooms in the Willamette Valley? (Select all that apply) Base: All survey respondents. 6,023 responses.

LIKELHOOD TO RETURN TO WILLAMETTE VALLEY

Virtually all wine tourists would be likely to return to the Willamette Valley. In total, 97.9 percent said they would be "likely" (7.4%) or "very likely" (90.5%) to return to the region. Less than half a percent said they were unlikely to return.

Figure 29: Likelihood to Return to Willamette Valley



Detail by Visitor Type

	Oregon Resident	Out of State	North Valley Visitor	Central Valley Visitor	South Valley Visitor	Wine Club Member	Non-Wine Club Member	Heavy Wine Consumer	Light Wine Consumer
Top-Two Box	99.6%	95.8%	98.0%	97.5%	97.8%	99.2%	95.5%	97.9%	97.9%
Very likely	97.7%	81.7%	90.0%	88.2%	91.5%	94.3%	83.6%	90.2%	91.7%
Likely	1.8%	14.1%	7.9%	9.3%	6.3%	4.8%	11.9%	7.7%	6.3%
Neutral	0.2%	2.6%	1.3%	1.6%	1.0%	0.5%	2.9%	1.2%	1.4%
Unlikely	0.0%	0.7%	0.3%	0.3%	0.4%	0.1%	0.6%	0.4%	0.3%
Very unlikely	0.1%	0.1%	0.1%	0.1%	0.2%	0.0%	0.2%	0.0%	0.2%
I don't know	0.1%	0.7%	0.4%	0.3%	0.6%	0.2%	0.8%	0.6%	0.3%
Base	3460	2834	5077	3469	1117	4311	1712	2521	2733

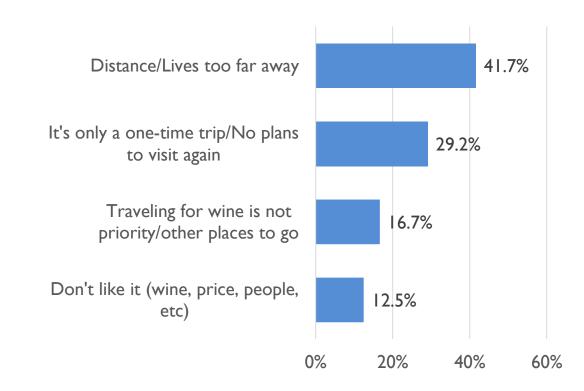
Question: How likely are you to return to the Willamette Valley? Base: All survey respondents. 6,294 responses.

DETERRENTS TO RETURNING TO WILLAMETTE VALLEY

Of the less than 1 percent of wine tourists who said they were unlikely to return to Willamette Valley, distance was the top reason wine tourists cited as their deterrent for returning. The few wine tourists surveyed who said they were unlikely to return were asked, in an open-ended format, to describe why they were unlikely to do so. The chart at right summarizes all deterrents cited. Beyond living too far from Willamette Valley, three-in-ten of this group felt that this was intended to be a one-time trip and/or had no future plans to return (29.2%) and 16.7 percent said traveling for wine was not a priority for them. Additionally, 12.5 percent of this group said they disliked a certain aspect of the area and therefore were unlikely to return.

Question: Why are you unlikely to return to the Willamette Valley? Base: Respondents who are unlikely to return to Willamette Valley. 24 responses.

Figure 30: Deterrents to Returning to Willamette Valley



WILLAMETTE VALLEY WINE CLUB MEMBER

Nearly six-in-ten wine tourists surveyed were Willamette Valley wine club members prior to their visit to the region (58.1%). This is primarily driven by Oregon residents—nearly three-quarters of in-state visitors were already wine club members (74.0%) compared to just under four-in-ten (38.6%) of out-of-state visitors.

Figure 31: Willamette Valley Wine Club Member



Detail by Visitor Type

	Oregon Resident	Out of State	North Valley Visitor	Central Valley Visitor	South Valley Visitor	Wine Club Member	Non-Wine Club Member	Heavy Wine Consumer	Light Wine Consumer
Yes	74.0%	38.6%	57.4%	51.2%	53.2%	83.0%	0.0%	61.9%	55.6%
No	26.0%	61.4%	42.6%	48.8%	46.8%	17.0%	100.0%	38.1%	44.4%
Base	3479	2844	5079	3474	1124	4311	1712	2527	2756

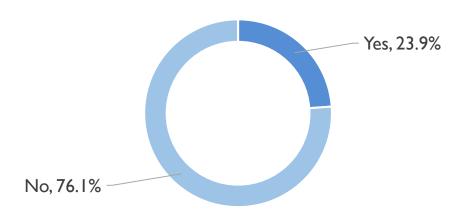
Question: Prior to this visit, were you a member of any Willamette Valley wine clubs? Base: All survey respondents. 6,232 responses.

JOINED WILLAMETTE VALLEY WINE CLUB ON TRIP

Nearly a quarter of wine tourists joined a Willamette Valley wine club on their most recent trip to the area (23.9%). Although Oregon residents were more likely to have already been a member of a Willamette Valley wine club prior, out-of-state visitors were much more likely to have joined a wine club on their most recent trip (35.8% vs. 14.3% for Oregon residents).

Figure 32: Joined Willamette Valley Wine Club on Trip





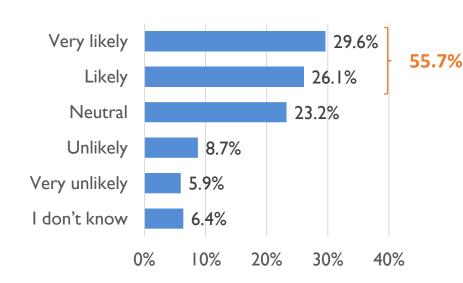
	Oregon Resident	Out of State	North Valley Visitor	Central Valley Visitor	South Valley Visitor	Wine Club Member	Non-Wine Club Member	Heavy Wine Consumer	Light Wine Consumer
Yes	14.3%	35.8%	26.5%	30.6%	24.0%	33.4%	0.0%	25.4%	13.0%
No	85.7%	64.2%	73.5%	69.4%	76.0%	66.6%	100.0%	74.6%	87.0%
Base	3335	2688	4877	3323	1073	4311	1712	2425	2569

Question: Did you join any Willamette Valley wine clubs while on this most recent trip? Base: All survey respondents. 6,023 responses.

LIKELIHOOD OF JOINING A WINE CLUB

Over half of all wine tourists say they are "likely" or "very likely" to join a Willamette Valley wine club in the future. Likelihood to join a wine club in Willamette Valley is somewhat higher amongst in-state wine tourists, but still strong in the out-of-state visitor set (60.3% vs. 50.1% for out-of-state visitors).

Figure 33: Likelihood of Joining A Wine Club



Detail by Visitor Type

	Oregon Resident	Out of State	North Valley Visitor	Central Valley Visitor	South Valley Visitor	Wine Club Member	Non-Wine Club Member	Heavy Wine Consumer	Light Wine Consumer
Top-Two Box	60.3%	50.1%	57.8%	56.0%	54.4%	69.2%	28.2%	59.4%	49.2%
Very likely	33.0%	25.6%	30.8%	29.5%	28.4%	39.6%	8.0%	32.0%	24.5%
Likely	27.4%	24.5%	26.9%	26.5%	26.0%	29.6%	20.2%	27.4%	24.6%
Neutral	21.8%	25.0%	23.2%	22.9%	21.5%	20.2%	32.1%	21.9%	25.3%
Unlikely	7.2%	10.6%	8.3%	9.2%	8.3%	3.9%	18.0%	8.0%	10.2%
Very unlikely	4.6%	7.5%	5.2%	6.2%	6.8%	1.5%	12.1%	4.8%	7.8%
I don't know	6.0%	6.8%	5.7%	5.7%	9.0%	5.2%	9.6%	5.9%	7.5%
Base	3471	2843	5074	3469	1123	4311	1712	2523	2752

Question: How likely are to you join a Willamette Valley wine club in the future? Base: All survey respondents. 6,314 responses.

LIKELIHOOD OF RECOMMENDING WILLAMETTE VALLEY

Wine tourists strongly feel the Willamette Valley provides both a highly satisfactory visitor experience and wine product that they would recommend to others. Presented with a list of statements, wine tourists were asked to rate their level of agreement on a 10-point scale. The chart at right shows the average scores given for each statement tested. The highest levels of agreement were that wine tourists were "very likely to recommend a trip to the Willamette Valley" (9.4) and they are also "very likely to recommend Willamette Valley wines to others" (9.3).

Speaking to the quality of Willamette Valley wines, wine tourists rated their agreement with being "much more likely to select Willamette Valley wines in restaurants, bars or retail stores" as an 8.3 out of 10.

Detail by type of visitor is presented on the following page

Question: I'm going to read you a few statements. Please rate your agreement with each on a 10-point scale, where "1" represents "Completely Disagree" and "10" represents "Completely Agree." Base: All survey respondents. 6,301 responses.

Figure 34: Likelihood of Recommending Willamette Valley



LIKELIHOOD OF RECOMMENDING WILLAMETTE VALLEY BY TYPE OF VISITOR

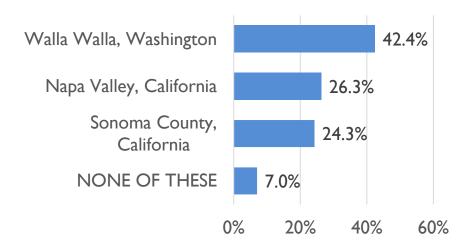
Mean Score on 10-Point Scale	Oregon Resident	Out of State	North Valley Visitor	Central Valley Visitor	South Valley Visitor	Wine Club Member	Non-Wine Club Member	Heavy Wine Consumer	Light Wine Consumer
I am very likely to recommend a trip to the Willamette Valley to others.	9.5	9.4	9.5	9.4	9.3	9.5	9.3	9.5	9.4
I am very likely to recommend Willamette Valley wines to others.	9.3	9.2	9.3	9.3	9.1	9.4	9.0	9.4	9.1
After this visit, I am much more likely to select Willamette Valley wines in restaurants, bars, and/or retail stores.	8.2	8.5	8.4	8.4	8.3	8.4	8.2	8.4	8.1
A special event or festival would motivate me to return to the Willamette Valley.	8.3	7.1	7.7	7.6	7.7	7.9	7.4	7.8	7.9

Question: I'm going to read you a few statements. Please rate your agreement with each on a 10-point scale, where "1" represents "Completely Disagree" and "10" represents "Completely Agree." Base: All survey respondents. 6,301 responses.

MOST DESIRED COMPETITIVE WINE REGION TO VISIT (aided)

Walla Walla was the most commonly desired competitive wine region compared to Napa Valley and Sonoma County amongst Willamette Valley wine tourists. Respondents were told to think of the West Coast wine regions of Walla Walla, Napa Valley and Sonoma County and asked which they would most like to visit. In total, 42.4 percent of all wine tourists surveyed said Walla Walla, WA was the wine region they would most like to visit followed distantly by Napa Valley (26.3%) and Sonoma County (24.3%). Although Walla Walla topped the list for both Oregon residents and out-of-state visitors, in-state wine tourists were more likely than their counterparts to select this destination as their preferred wine region (49.9% vs. 36.3%, respectively).

Figure 35: Desired Wine Region to Visit



Detail by Visitor Type

	Oregon Resident	Out of State	North Valley Visitor	Central Valley Visitor	South Valley Visitor	Wine Club Member	Non-Wine Club Member	Wine	Light Wine Consumer
Walla Walla, Washington	49.9%	36.3%	44.3%	42.9%	40.3%	47.7%	38.5%	46.3%	43.9%
Napa Valley, California	23.9%	28.2%	24.6%	24.7%	33.2%	23.6%	28.0%	23.0%	28.9%
Sonoma County, California	18.9%	28.6%	25.1%	25.4%	18.0%	22.9%	26.3%	24.5%	20.2%
NONE OF THESE	7.2%	6.8%	5.9%	7.0%	8.6%	5.8%	7.2%	6.2%	7.1%
Base	3628	4439	5077	3474	1125	4311	1712	2521	2746

Question: Which of these wine regions would you most like to visit? Base: All survey respondents. 8,067 responses.

Destination Analysts

REASONS WILLAMETTE VALLEY IS MORE ATTRACTIVE

Compared to Walla Walla, Willamette Valley's easily accessible location was considered the top attribute that made the area more attractive (46.1%), distantly followed by pinot noir (14.1%) and scenic beauty (13.0%).

Compared to Napa Valley and Sonoma County, Willamette Valley is seen as superior for being less crowded, less expensive and less commercialized.

Question: In what ways would you say the Willamette Valley is a MORE ATTRACTIVE destination to visit than ? Base: All survey respondents. 6,46 I responses.

Figure 36: Reasons Willamette Valley is More Attractive

	Walla Walla, Washington	Napa Valley, California	Sonoma County, California
Proximity to home/Ease of access	46.1%	25.6%	26.1%
Pinot Noir (specifically)	14.1%	10.2%	13.0%
Less crowded/busy	0.7%	22.3%	22.0%
Scenic Beauty	13.0%	11.8%	8.8%
Less expensive	1.4%	18.4%	16.5%
No commercialized (smaller/family run vineyards/wineries)	1.4%	16.7%	16.0%
Better wine (in general)	8.7%	7.4%	8.4%
More scenic geography (green, lush, hills)	8.4%	7.0%	8.2%
Friendly people/culture	2.1%	8.2%	8.1%
Concentration of wineries in area	8.4%	2.0%	3.5%
Climate/weather	5.5%	4.2%	3.5%
It's new/Have not been yet and want to go	6.0%	2.5%	1.4%
More relaxed	0.4%	4.8%	5.4%
More activities	4.4%	0.9%	1.0%
More familiar with Willamette Valley	3.7%	0.9%	0.8%
Not sure	2.1%	1.2%	0.9%
Ability to visit other attractions in Oregon	2.0%	0.7%	1.1%
Reputation of region (Popularity/Quality)	2.0%	1.0%	0.6%
Better culinary options/experiences	2.0%	0.3%	0.8%
Base	2917	1841	1698

REASONS WILLAMETTE VALLEY IS LESS ATTRACTIVE

A notable proportion of wine tourists surveyed felt that there was nothing that made Willamette Valley less attractive than the competing wine regions tested.

Amongst the tangible points of differentiation cited, compared to Walla Walla, Willamette Valley does not have the preferred wine varietals. Furthermore, these wine tourists "would like a new experience" from Willamette Valley.

Superior attributes Napa Valley and Sonoma County are felt to have to Willamette Valley are more amenities and better weather.

Question: In what ways would you say the Willamette Valley is a LESS ATTRACTIVE destination to visit than? Base: All survey respondents. 5,857 responses.

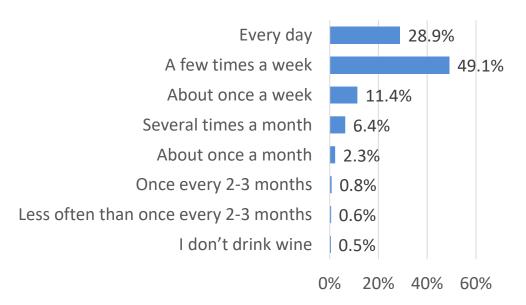
Figure 37: Reasons Willamette Valley is Less Attractive

	Walla Walla,	Napa Valley,	Sonoma County,
	Washington	California	California
Not less attractive	21.8%	17.1%	17.3%
Doesn't have wine varietals I like	22.7%	13.5%	16.3%
Less amenities available (dining, lodging, etc.)	3.8%	15.5%	17.4%
Less desirable weather	3.4%	13.7%	11.9%
Would like a new experience	14.0%	3.9%	3.5%
Distance to travel/Lives too far away	5.0%	7.2%	10.8%
Not sure	8.7%	4.3%	3.4%
Wineries are too spread out geographically	3.7%	4.8%	4.4%
Reputation of region (Popularity/Quality)	1.0%	8.1%	3.4%
Busier/Crowded	5.4%	0.5%	0.6%
Pricey	3.6%	1.7%	1.9%
Quality of amenities	0.5%	4.7%	3.1%
Traffic	3.6%	1.2%	1.6%
Less scenic	1.1%	1.6%	1.8%
Transportation options available	0.8%	1.2%	1.2%
Not accomodating towards tourism	0.7%	0.6%	1.0%
Unfriendly people/culture	0.2%	0.4%	0.6%
Base	2537	1706	1610

FREQUENCY OF WINE CONSUMPTION

Willamette Valley wine tourists are frequent consumers of wine. Nearly eight-in-ten respondents said that on average they drink wine at least a few times a week including 28.9 percent who drink wine every day. Out-of-state wine tourists surveyed were more likely than Oregon residents to say they drink wine every day (32.7% vs. 24.3%, respectively).

Figure 38: Frequency of Wine Consumption



Question: On average, how often do you drink wine? Base: All survey respondents. 7783 responses.

Detail by Visitor Type

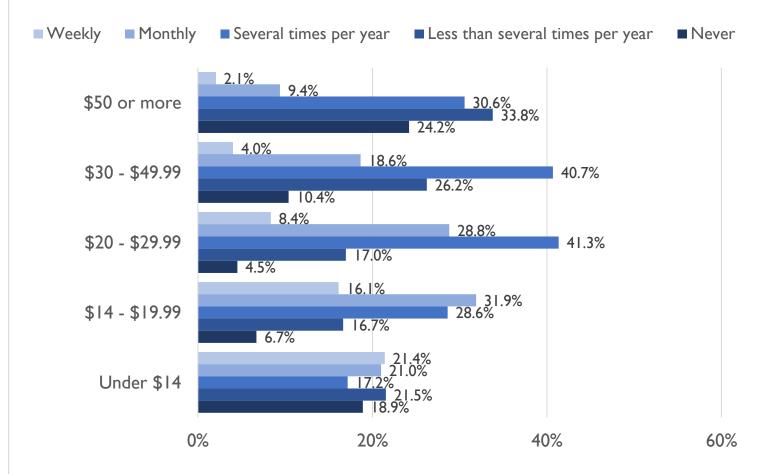
	Oregon Resident	Out of State	North Valley Visitor	Central Valley Visitor	South Valley Visitor	Wine Club Member		Wine	Light Wine Consumer
Every day	24.3%	32.7%	29.2%	31.4%	25.8%	30.3%	22.7%	29.3%	21.7%
A few times a week	49.2%	49.1%	51.0%	50.2%	47.2%	50.5%	48.9%	51.7%	48.9%
About once a week	13.5%	9.7%	11.3%	10.9%	12.8%	11.2%	13.8%	12.0%	14.4%
Several times a month	8.0%	5.1%	5.7%	5.2%	8.9%	5.8%	7.9%	4.9%	9.5%
About once a month	2.9%	1.8%	1.9%	1.6%	2.8%	1.5%	3.9%	1.6%	3.4%
Once every 2-3 months	1.0%	0.7%	0.6%	0.4%	1.3%	0.3%	1.6%	0.3%	1.1%
Less often than once every 2-3 months	0.6%	0.6%	0.2%	0.2%	1.1%	0.1%	0.8%	0.1%	0.6%
I don't drink wine	0.5%	0.4%	0.2%	0.2%	0.1%	0.1%	0.4%	0.1%	0.4%
Base	3492	4291	4877	3323	1073	4311	1712	2425	2569

WINE PURCHASE FREQUENCY

In general, Willamette Valley wine tourists purchase less expensive bottles of wine with higher frequency (weekly or monthly) and purchase more expensive bottles less often (several times per year or less than several times per year). Approximately a quarter of all respondents said they never purchase bottles of wine that cost \$50 or more (24.2%).

Detail by type of visitor is presented on the following page

Figure 39:Wine Purchase Frequency



WINE PURCHASE FREQUENCY BY TYPE OF VISITOR

Wine purchasing habits differ between Oregon residents and out-of-state wine tourists. Out-of-state wine tourists are more likely to purchase moderately priced bottles (between \$20-\$29.99) on a monthly basis (32.1% vs. 24.7%) while Oregon residents are more likely to purchase bottles at this price point less frequently, making these purchases several times per year on average (45.6% vs. 37.9%). Out-of-state wine tourists are also more likely to purchase expensive bottles of wine (priced \$50 or more) several times per year (33.0% vs. 27.5%) while Oregon residents are more likely to never purchase bottles of wine at this price (30.4% vs. 19.2%).

	Weekly		Monthly		Several times per year			in several per year	Never		
	Oregon Resident	Out of State	Oregon Resident	Out of State	Oregon Resident	Out of State	Oregon Resident	Out of State	Oregon Resident	Out of State	
\$50 or more	1.0%	2.9%	7.3%	11.1%	27.5%	33.0%	33.8%	33.8%	30.4%	19.2%	
\$30 - \$49.99	2.6%	5.2%	15.5%	21.2%	40.3%	41.0%	28.3%	24.6%	13.3%	8.0%	
\$20 - \$29.99	5.8%	10.4%	24.7%	32.1%	45.6%	37.9%	18.6%	15.6%	5.3%	3.9%	
\$14 - \$19.99	13.9%	17.9%	30.5%	33.0%	31.9%	25.9%	17.4%	16.0%	6.2%	7.1%	
Under \$14	21.8%	21.1%	22.0%	20.2%	18.5%	16.1%	20.9%	22.0%	16.8%	20.6%	

WINE PURCHASE FREQUENCY BY TYPE OF VISITOR (Continued)

		Weekly		Monthly			Sovon	al times pe	rvoor		s than seve		Never		
	North Valley Visitor	Central Valley Visitor	South Valley Visitor												
\$50 or more	2.3%	2.5%	1.9%	11.3%	11.3%	7.3%	35.0%	32.6%	17.7%	33.3%	33.4%	30.0%	18.2%	20.2%	43.2%
\$30 - \$49.99	4.3%	4.8%	3.2%	21.0%	21.1%	13.1%	43.6%	42.0%	30.9%	24.5%	24.5%	33.6%	6.6%	7.7%	19.2%
\$20 - \$29.99	9.0%	9.5%	7.9%	29.8%	30.5%	26.0%	42.4%	41.6%	40.2%	15.4%	15.5%	20.1%	3.5%	3.0%	5.8%
\$14 - \$19.99	16.8%	17.2%	16.1%	30.9%	31.7%	33.1%	27.7%	28.6%	33.4%	17.3%	16.1%	13.0%	7.2%	6.5%	4.5%
Under \$14	20.6%	21.6%	26.9%	19.6%	20.5%	23.6%	17.0%	16.0%	18.6%	22.3%	22.2%	18.4%	20.6%	19.7%	12.5%

	Weekly		Monthly		Several times per year			an several per year	Never	
	Wine Club Member	Non-Wine Club Member	Wine Club Member	Non-Wine Club Member	Wine Club Member	Non-Wine Club Member	Wine Club Member	Non-Wine Club Member	Wine Club Member	Non-Wine Club Member
\$50 or more	2.2%	1.5%	11.3%	5.8%	35.4%	20.6%	32.8%	35.1%	18.3%	37.0%
\$30 - \$49.99	4.2%	2.9%	21.0%	13.6%	45.3%	31.5%	23.0%	35.1%	6.5%	16.8%
\$20 - \$29.99	8.6%	7.1%	29.0%	26.9%	44.6%	37.7%	14.7%	22.4%	3.0%	5.9%
\$14 - \$19.99	15.7%	17.2%	30.5%	33.2%	28.9%	30.6%	18.0%	13.4%	6.9%	5.5%
Under \$14	20.3%	24.6%	19.9%	22.9%	16.8%	18.9%	23.3%	17.5%	19.8%	16.1%

DEMOGRAPHIC PROFILES OF WILLAMETTE VALLEY VISITORS

DEMOGRAPHICS BY TYPE OF VISITOR

	Oregon	Out	North Valley	Central Valley	South Valley	Wine Club	Non-Wine Club	Heavy Wine	Light Wine
	Resident	of State	Valley Visitor	Visitor	Visitor	Member	Member	Consumer	Consumer
Female	60.4%	44.6%	50.4%	49.3%	60.0%	50.9%	58.9%	51.2%	62.0%
Male	37.8%	53.8%	47.8%	48.8%	37.8%	47.4%	39.4%	47.0%	36.2%
Other	0.1%	0.1%	0.1%	0.1%	0.1%	0.1%	0.0%	0.1%	0.1%
I prefer not to answer	1.7%	1.5%	1.6%	1.8%	2.1%	1.6%	1.7%	1.7%	1.7%
65 or above	20.7%	25.6%	21.1%	24.3%	24.4%	22.9%	20.3%	21.8%	20.9%
55 to 64	23.1%	29.8%	26.1%	26.8%	25.5%	26.6%	24.8%	26.0%	22.9%
45 to 54	18.6%	18.5%	19.7%	19.1%	16.9%	19.7%	17.8%	20.3%	17.0%
35 to 44	19.5%	15.2%	18.3%	15.8%	16.1%	18.0%	17.2%	19.2%	17.9%
21 to 34	15.7%	8.5%	12.7%	11.9%	13.9%	10.6%	17.7%	10.4%	18.9%
Under 21	0.1%	0.0%	0.0%	0.0%	0.1%	0.0%	0.0%	0.0%	0.1%
I prefer not to answer	2.3%	2.3%	2.1%	2.1%	3.1%	2.2%	2.3%	2.3%	2.2%
Mean Age	49.6	53.1	50.8	51.8	51.2	51.6	49.5	51.3	49.1
\$140,000 or more	27.8%	44.1%	39.5%	37.5%	24.3%	39.7%	27.3%	40.7%	25.3%
\$120,000 - \$139,999	9.5%	7.9%	9.1%	8.7%	9.3%	8.7%	9.1%	8.7%	10.0%
\$100,00 - \$119,999	11.9%	8.6%	10.2%	9.7%	11.2%	10.6%	9.5%	11.1%	11.0%
\$80,000 - \$99,999	10.6%	6.4%	7.9%	8.5%	10.6%	8.5%	9.5%	7.5%	11.4%
\$60,000 - \$79,999	10.4%	5.3%	6.8%	7.7%	12.5%	6.8%	11.2%	6.7%	11.0%
\$40,000 - \$59,999	7.0%	3.2%	4.1%	5.2%	7.6%	4.0%	7.7%	3.3%	7.8%
\$20,000 - \$39,999	3.3%	1.2%	1.5%	2.1%	4.2%	1.5%	3.8%	0.9%	3.8%
Less than \$20,000	0.8%	0.5%	0.4%	0.5%	1.1%	0.2%	0.8%	0.4%	0.9%
I prefer not to answer	18.6%	22.7%	20.5%	20.2%	19.2%	20.0%	21.1%	20.8%	18.7%
Mean Household Income	\$105,415	\$120,326	\$116,739	\$113,730	\$101,357	\$116,781	\$103,829	\$118,511	\$102,915

Gender

Age

Income

DEMOGRAPHICS BY TYPE OF VISITOR (Continued)

Ethnicity

Formal Education

	Oregon Resident	Out of State	North Valley Visitor	Central Valley Visitor	South Valley Visitor	Wine Club Member	Non-Wine Club Member	Heavy Wine Consumer	Light Wine Consumer
White/Caucasian	84.5%	86.3%	85.4%	85.3%	84.2%	86.1%	84.4%	85.9%	84.0%
Hispanic/Latino	2.6%	2.1%	2.3%	2.3%	3.0%	2.3%	2.4%	2.6%	2.8%
Asian/Pacific Islander	1.9%	2.5%	2.4%	2.0%	1.1%	1.9%	2.4%	2.5%	2.2%
Black/African-American	0.4%	0.7%	0.5%	0.5%	0.7%	0.4%	0.6%	0.4%	0.5%
Native American/Aleut/Eskimo	0.6%	0.2%	0.4%	0.5%	0.6%	0.5%	0.5%	0.4%	0.5%
Other	1.2%	1.0%	1.2%	1.2%	1.1%	1.1%	0.8%	1.0%	1.2%
I prefer not to answer	8.7%	7.1%	7.9%	8.3%	9.3%	7.8%	8.9%	7.2%	8.7%
Completed graduate school	30.5%	41.5%	37.3%	37.3%	32.6%	36.7%	32.8%	37.3%	32.2%
Bachelor's degree	42.0%	40.8%	42.9%	41.9%	35.1%	41.2%	43.1%	41.7%	42.0%
Attended some college	19.2%	12.9%	14.2%	14.7%	21.8%	15.8%	16.8%	15.2%	18.1%
High school graduate	3.5%	1.7%	1.9%	2.5%	5.0%	2.3%	2.9%	2.5%	3.1%
Some high school or less	0.1%	0.2%	0.2%	0.2%	0.1%	0.1%	0.2%	0.0%	0.2%
I prefer not to answer	4.6%	2.9%	3.5%	3.5%	5.4%	3.8%	4.1%	3.2%	4.4%

DEMOGRAPHICS BY TYPE OF VISITOR (Continued)

Marital Status

Adult Children

LGBTQ

	Oregon Resident	Out of State	North Valley Visitor	Central Valley Visitor	South Valley Visitor	Wine Club Member	Non-Wine Club Member	Heavy Wine Consumer	Light Wine Consumer
Single	17.6%	12.2%	14.5%	15.0%	17.2%	13.4%	18.3%	13.9%	19.0%
Single w/children under age 18	1.4%	0.7%	1.0%	1.0%	1.6%	1.0%	1.4%	1.0%	1.3%
Married/Partnered	59.0%	69.0%	64.6%	66.6%	61.6%	65.7%	60.2%	64.7%	58.4%
Married/Partnered w/children under age 18	16.7%	13.4%	15.2%	13.1%	13.7%	15.4%	14.3%	15.5%	15.6%
Other	1.7%	1.8%	1.5%	1.6%	1.7%	1.4%	2.2%	1.8%	2.0%
I prefer not to answer	3.7%	2.8%	3.1%	2.7%	4.2%	3.1%	3.7%	3.0%	3.7%
Has Adult Children over the Age of 21	45.3%	52.2%	46.5%	49.9%	54.0%	49.6%	42.9%	47.5%	44.3%
Heterosexual	81.0%	85.8%	83.5%	83.3%	80.8%	83.3%	81.7%	84.5%	81.4%
Gay/lesbian/bisexual/ transgender	4.8%	3.3%	4.5%	4.4%	3.7%	4.6%	3.9%	4.4%	4.4%
Other	0.8%	0.5%	0.5%	0.5%	0.6%	0.5%	0.8%	0.3%	0.9%
I prefer not to answer	13.4%	10.4%	11.6%	11.8%	14.9%	11.6%	13.7%	10.7%	13.3%

APPENDIX I: FINDINGS BROKEN OUT BY VISITOR PLACE OF STAY

APPENDIX I: DETAIL BY VISITOR PLACE OF STAY

Figure 1: Number of Trips

		Hotel or	Vacation home/room	Bed & breakfast or
	Day Tripper	motel	rental	inn
9 or more	7.5%	0.7%	2.0%	1.5%
8	5.5%	0.4%	1.3%	0.0%
7	3.1%	0.4%	0.3%	0.4%
6	12.7%	3.7%	1.7%	2.6%
5	8.8%	3.1%	2.3%	2.6%
4	13.5%	5.7%	3.0%	1.1%
3	15.8%	8.8%	4.7%	4.8%
2	16.2%	18.2%	16.7%	13.3%
1	17.0%	58.9%	68.0%	73.7%
Mean	4.1	2.0	1.8	1.7
Base	1953	543	300	270

Question: How many of these trips [to the Willamette Valley in which you tasted and/or bought Willamette Valley wine] did you take? Base: All survey respondents. 3,355 responses.

Figure 2: Month Trip Was Taken

			Vacation	Bed &
	Day Tripper	Hotel or motel	-	breakfast or inn
January	25.4%	10.3%	7.6%	5.7%
February	33.1%	13.8%	10.5%	8.2%
March	42.7%	16.2%	12.1%	10.5%
April	43.1%	18.1%	14.4%	15.0%
May	51.8%	23.0%	19.8%	20.7%
June	50.6%	23.2%	19.1%	17.6%
July	51.0%	26.7%	25.5%	18.6%
August	55.4%	29.4%	24.5%	20.5%
September	56.0%	32.0%	33.7%	30.1%
October	52.7%	28.9%	24.9%	25.6%
November	39.4%	15.2%	13.0%	8.6%
December	20.1%	7.5%	4.3%	4.9%
Base	3564	968	514	488

Question: In which month(s) did you take this trip(s)? (Select all that apply) Base: All survey respondents. 6,084 responses.

Figure 3: Immediate Travel Party by Gender

TRAVEL PARTY		Hotel or	Vacation home/room	Bed & breakfast or
COMPOSITION (MEAN)	Day Tripper	motel	rental	inn
Adult Males	1.5	1.3	1.6	1.3
Adult Females	1.8	1.4	2.0	1.4
Male Children	0.1	0.1	0.1	0.0
Female Children	0.1	0.1	0.1	0.0
Other	0.2	0.3	0.2	0.1
Mean Travel Party Size	3.6	3.0	4.0	2.9
Base	3564	968	514	488

Figure 4: Immediate Travel Party Ages

			Vacation	Bed &
TRAVEL PARTY			home/room	breakfast or
AGES	Day Tripper	Hotel or motel	rental	inn
75 or older	7.0%	6.6%	3.6%	5.6%
65 - 74	29.7%	31.5%	21.6%	36.2%
55 - 64	39.3%	44.1%	43.2%	46.7%
45 - 54	32.6%	33.9%	35.4%	24.1%
35 - 45	32.6%	25.9%	35.8%	19.9%
25 - 34	28.8%	14.2%	25.8%	15.5%
18 - 24	5.9%	4.0%	6.1%	1.8%
17 or younger	8.6%	6.0%	5.5%	1.8%
Base	3705	1021	528	497

Question: Please tell me about your IMMEDIATE travel party. How many identify as male or female, and what are their ages? Base: All survey respondents. 6327 responses.

Figure 5: Primary Reason for Trip

	Day Tripper	Hotel or motel	Vacation home/room rental	Bed & breakfast or inn
Leisure day trip	79.4%	9.8%	3.2%	5.8%
Vacation	4.4%	40.1%	50.2%	52.7%
Weekend getaway	3.6%	29.9%	31.4%	30.7%
Visit family/friends	6.5%	6.0%	5.8%	3.4%
Wedding or special				
event	1.9%	5.7%	4.9%	3.2%
Business/conference/				
government travel	1.2%	5.6%	1.7%	1.0%
Other	3.1%	2.9%	2.8%	3.2%
Base	3738	1031	532	501

Question: Which of these best describes your trip? Base: All survey respondents. 6,326 responses.

Figure 6:Trip Motivators

		Hotel or	Vacation home/room	Bed & breakfast or
	Day Tripper	motel	rental	inn
Wine (in general)/quality of wine/variety	32.5%	38.7%	39.1%	42.7%
Scenic Beauty	20.8%	14.4%	10.9%	14.7%
Wine tasting (specifically)	15.9%	14.1%	17.8%	14.7%
Proximity to home/Ease of access	11.1%	4.2%	6.7%	3.1%
Concentration/variety of wineries in area	7.9%	9.1%	9.7%	9.0%
Wine club member visit/pick-up	10.5%	2.2%	2.2%	1.0%
Pinot Noir (specifically)	3.9%	10.8%	11.1%	11.8%
Restaurants and food scene	3.1%	5.3%	7.2%	7.7%
Climate/weather	4.7%	3.1%	3.2%	2.1%
Rural, Countryside, Hills, Wine Country	2.3%	4.6%	5.7%	9.8%
Overall ambiance and atmosphere	3.2%	2.7%	2.5%	2.6%
Special event(s) and/or festival(s)	2.7%	4.1%	2.2%	1.3%
Love everything about the Willamette area	2.1%	3.9%	2.7%	4.6%
Local/Live here	3.5%	0.3%	0.2%	0.3%
Spend quality time with friends or family	2.7%	0.8%	2.0%	2.1%
Friends or family in the area	1.0%	2.9%	1.7%	0.8%
Visit specific winery (wineries)	2.2%	0.6%	2.0%	1.0%
Friendly people/culture	2.1%	1.0%	1.7%	0.5%
Interested in new experiences	1.4%	2.2%	1.5%	2.3%
Reputation of region (Popularity/Quality)	1.1%	2.1%	2.7%	1.3%
Outdoor activities (hiking, biking, etc.)	0.6%	1.1%	4.5%	1.8%

Question: Please think specifically about the Willamette Valley and its attributes. What qualities of the Willamette Valley motivated this visit? Base: All survey respondents. 4,537 responses.

Figure 7: Days Spent in Willamette Valley

	Day Tripper	Hotel or motel	Vacation home/room rental	Bed & breakfast or inn
8 or more	2.1%	4.0%	6.1%	3.9%
7	0.8%	2.3%	4.8%	2.1%
6	0.7%	3.8%	7.3%	3.7%
5	0.9%	8.6%	12.7%	13.6%
4	1.3%	15.2%	24.4%	20.7%
3	2.4%	30.8%	26.1%	37.4%
2	6.2%	28.1%	17.2%	16.7%
1	85.5%	7.2%	1.4%	1.9%
Mean	1.5	3.4	4.1	3.7
Base	3352	950	505	484

Figure 8: Nights Spent in Willamette Valley

	Day Triange	Hatal an markel	Vacation home/room	Bed & breakfast or
_	Day Tripper	Hotel or motel	rental	inn
8 or more	0.0%	2.2%	3.9%	2.7%
7	0.0%	1.4%	3.5%	1.4%
6	0.0%	3.4%	4.1%	2.3%
5	0.0%	3.6%	7.1%	4.3%
4	0.0%	10.1%	15.7%	15.4%
3	0.0%	16.3%	24.6%	23.9%
2	0.0%	31.6%	25.5%	34.2%
1	0.0%	26.1%	14.1%	14.8%
0	100%	5.5%	1.4%	1.0%
Mean	0.0	2.5	3.3	2.9
Base	3531	953	509	486

Question: How many days did you spend in the Willamette Valley on this trip? Base: All survey respondents . 5,741 responses.

Question: How many nights?

Base: Respondents who stayed overnight in Willamette Valley. 2,495 responses.

Figure 9: Daily In-Market Spending

	D. Tillian		Vacation home/	Bed & breakfast
	Day Tripper	Hotel or motel	room rental	or inn
Wine to take/ship home	\$164.27	\$242.19	\$268.49	\$266.72
Restaurants & dining out	\$62.01	\$224.25	\$226.51	\$249.12
Lodging	\$0.00	\$304.81	\$300.26	\$366.42
Wine to consume on your trip	\$31.02	\$86.38	\$116.59	\$93.19
Gas, parking & local transportation	\$21.19	\$66.23	\$77.26	\$65.68
Tasting room fees	\$25.27	\$49.25	\$67.49	\$53.19
Retail purchases (excluding wine)	\$14.26	\$61.90	\$64.08	\$55.13
Sightseeing & recreation	\$4.13	\$30.63	\$29.39	\$29.79
Other	\$3.63	\$11.62	\$16.07	\$14.56
Mean Spend per Travel Party	\$325.79	\$1,077.25	\$1,166.13	\$1,193.80
# People Covered by Spending	2.3	2.2	2.5	2.1
Mean Spend per Person	\$139.40	\$499.71	\$471.13	\$558.41
Base	3518	793	378	352

Question: Approximately how much you will spend in the Willamette Valley PER DAY on each? Base: All survey respondents. 6,218 responses.

Figure 10a: Wineries Visited

			Vacation	Bed &
WINERIES:	Day Tripper	Hotel or motel	home/room rental	breakfast or inn
9 or more	1.8%	12.2%	24.0%	21.6%
8	0.6%	7.3%	8.0%	11.2%
7	0.8%	6.8%	8.8%	7.8%
6	2.0%	13.3%	13.7%	14.6%
5	4.0%	10.4%	10.5%	9.7%
4	13.0%	14.9%	12.3%	14.8%
3	26.6%	16.5%	12.9%	11.2%
2	26.2%	8.8%	6.4%	5.5%
1	23.1%	7.6%	2.3%	3.4%
0	2.0%	2.1%	1.2%	0.2%
Mean	2.7	5.0	6.2	6.2
Base	3712	986	488	473

Figure 10b:Tasting Rooms Visited

TASTING ROOMS:	Day Tripper	Hotel or motel	Vacation home/ room rental	Bed & breakfast or inn
6 or more	0.6%	3.5%	5.1%	4.0%
5	0.5%	1.0%	2.1%	2.4%
4	1.0%	4.7%	3.6%	3.6%
3	3.2%	7.4%	7.5%	9.0%
2	7.5%	15.7%	19.0%	15.6%
1	18.8%	21.1%	19.4%	24.4%
0	68.4%	46.6%	43.4%	41.1%
Mean	0.6	1.3	1.4	1.5
Base	3737	1032	532	501

Question: How many Willamette Valley wineries and stand-alone tasting rooms will you visit on this trip? Base: All survey respondents. 6,326 responses.

Figure 11: Bottles of Wine Purchased

	Day Tripper	Hotel or motel	Vacation home/room rental	Bed & breakfast or inn
9 or more	20.5%	40.2%	44.6%	42.9%
8	4.0%	3.9%	5.0%	6.0%
7	1.8%	1.3%	3.5%	0.9%
6	14.8%	12.6%	12.9%	14.9%
5	4.2%	3.2%	4.1%	5.7%
4	11.4%	8.2%	6.7%	7.7%
3	12.1%	8.1%	7.0%	5.7%
2	16.2%	10.9%	8.8%	7.7%
1	9.1%	4.8%	3.8%	2.9%
0	6.0%	6.8%	3.5%	5.7%
Mean	5.4	7.5	8.3	8.2
Base	3425	752	341	350

Question: On this visit, how many bottles of wine will you buy at these wineries or stand-alone tasting rooms? Base: All survey respondents. 5,286 responses.

Figure 12: Willamette Valley Areas Visited

			Vacation	Bed &
	Day Tripper	Hotel or motel	home/room rental	breakfast or inn
Dundee Hills	53.5%	70.7%	75.6%	80.0%
McMinnville	24.5%	59.8%	69.2%	72.7%
Yamhill-Carlton	30.0%	48.7%	60.3%	57.1%
Portland	12.3%	40.8%	45.1%	44.7%
Eola-Amity Hills	17.7%	31.2%	35.9%	37.1%
Chehalem Mountains	20.2%	27.5%	33.6%	31.5%
Ribbon Ridge	15.9%	27.3%	31.4%	28.3%
Eugene	13.5%	14.5%	8.5%	9.4%
Salem	10.0%	18.3%	14.1%	13.2%
Corvallis	3.7%	10.2%	8.8%	9.0%
Albany	1.6%	4.2%	3.4%	2.0%
Base	3737	1032	532	501

Question: Which towns or areas of the Willamette Valley will you visit on this trip? Base: All survey respondents. 6,326 responses.

Figure 13:Trip Inspiration		Hotel or	Vacation home/room	
	Day Tripper	motel	rental	inn
I'd been there in the past	58.9%	50.0%	45.9%	44.7%
Opinions of friends and relatives (directly, face to face)	21.7%	24.1%	32.7%	27.7%
Wine event	22.2%	11.8%	14.1%	11.6%
Information from a wine club	20.6%	9.0%	9.0%	9.2%
Wine-related magazine (print or online)	5.2%	16.2%	13.7%	18.2%
Wine store or retailer	4.3%	9.1%	10.2%	7.4%
Tourism websites (official website of a local visitors or convention bureau or chamber of commerce)	2.9%	9.6%	8.3%	8.6%
Wine blogs or bloggers	2.8%	7.9%	9.0%	7.8%
Opinions of friends and relatives (via social media)	3.9%	5.1%	5.3%	4.0%
Travel or lifestyle magazine (print or online)	1.7%	6.5%	5.6%	7.0%
Traveler reviews websites (i.e. TripAdvisor)	1.3%	5.9%	4.3%	6.4%
Advertisement(s)	2.0%	2.6%	1.3%	2.8%
Opinions of digital influencers	0.9%	1.3%	1.3%	1.0%
Newspaper	0.7%	1.1%	0.4%	1.0%
Online video	0.3%	1.0%	0.9%	1.4%
Movies	0.2%	0.7%	0.6%	0.8%
Wine related magazine (print or online)	0.2%	0.5%	0.0%	0.6%
Television programming	0.1%	0.6%	0.0%	0.8%
Podcast	0.2%	0.3%	0.4%	0.2%
Travel agency	0.1%	0.4%	0.2%	0.4%
Radio programming	0.1%	0.0%	0.2%	0.0%
Other	0.7%	2.3%	0.9%	0.4%
Base	3737	1032	532	501

Question: Which of the following inspired you to make this visit to the Willamette Valley?

Base: All survey respondents. 6,326 responses.

Figure 14: Resources Used to Select Wineries/Tasting Rooms

	Day Tripper	Hotel or motel	Vacation home/room rental	Bed & breakfast or inn
Word of mouth (recommendation from friend/family, etc.)	40.6%	42.2%	53.5%	46.4%
Free winery map/guide	16.6%	32.2%	31.4%	35.6%
Website of an individual winery	19.7%	24.4%	30.4%	27.0%
Willamette Valley Wineries Guides	9.4%	21.9%	27.8%	29.4%
Road sign	14.8%	14.6%	11.9%	11.2%
Oregon Wine Touring Guide (Official Guide from the Oregon Wine				
Board)	7.5%	21.5%	24.2%	25.8%
Mapping website (i.e. Google Maps)	9.9%	16.0%	18.3%	14.8%
Wine publication (Wine Spectator, Wine & Spirits, etc.)	5.2%	16.9%	18.9%	18.0%
Reviews website (i.e. Yelp, TripAdvisor)	5.2%	12.2%	19.8%	17.6%
www.WillametteWines.com	4.3%	13.8%	15.1%	14.2%
Social Media (i.e. Facebook, Instagram, YouTube, Pinterest, etc.)	7.9%	6.1%	8.7%	4.6%
Wine store or retailer referral	5.0%	10.4%	11.9%	9.0%
Free travel guidebook/brochure	3.9%	12.4%	9.5%	15.0%
Travel Oregon Visitor Guide (Official Guide from Travel Oregon)	2.3%	8.8%	8.9%	9.2%
Magazine/newspaper	2.8%	5.9%	4.9%	8.0%
Concierge	0.8%	10.5%	2.3%	12.4%
www.OregonWine.org (Official Website of the Oregon Wine				
Board)	1.5%	5.8%	6.8%	5.4%
Other travel-related website	1.3%	6.1%	8.1%	4.8%
www.TravelOregon.com (Official Website of Travel Oregon)	1.5%	6.4%	4.5%	4.4%
Commercial travel guidebook (i.e. Lonely Planet)	0.8%	3.4%	3.2%	3.6%
Online travel agency (i.e. Expedia, Priceline)	0.3%	0.7%	1.1%	1.0%
Traditional travel agency	0.1%	0.3%	0.6%	0.8%
Mean # of Resources Used	1.6	2.9	3.2	3.2
Base	3714	1021	529	500

Question: Which of these resources did you use to select the wineries and tasting rooms you will visit during this trip?

Base: All survey respondents. 6,277 responses.

Figure 15:Activities in Willamette Valley

			Vacation	Bed &
		Hotel or	home/room	breakfast or
	Day Tripper	motel	rental	inn
Wine tasting	82.9%	89.1%	91.0%	91.8%
Dining in restaurants	43.4%	81.9%	83.1%	86.4%
Winery tour	17.8%	43.0%	59.0%	52.3%
Shopping	12.6%	33.7%	36.1%	33.9%
Brewery/distillery	9.8%	21.6%	24.8%	21.8%
Outdoor recreation – Land (biking, cycling, hiking, golf, etc.)	6.6%	17.0%	29.7%	17.2%
Bars/nightlife	4.2%	19.9%	22.7%	14.6%
Visit a park	5.4%	15.2%	19.4%	13.6%
Farm, orchard or nursery visit (non-winery)	6.3%	8.5%	12.6%	13.0%
Attend a festival or special event	6.4%	8.4%	9.2%	8.2%
Other culinary events or activities	4.4%	7.5%	10.5%	8.4%
Visit a historical attraction	2.3%	11.3%	10.7%	9.8%
Live musical performance	4.8%	4.3%	7.5%	5.2%
Visit a museum	2.0%	10.2%	8.3%	10.8%
Visit a cannabis dispensary	2.2%	7.1%	9.4%	8.0%
Outdoor recreation – Water (fishing, swimming, canoeing/kayaking, etc.)	2.4%	5.2%	6.0%	5.2%
Spa visit	1.2%	9.9%	3.6%	8.2%
Camping/glamping	0.9%	0.9%	1.1%	0.6%
Casino	1.3%	2.3%	1.3%	1.0%
Theater or performing arts	0.8%	2.2%	1.3%	1.2%
Business convention	0.3%	2.7%	1.1%	0.2%
Other	3.0%	5.2%	1.7%	1.8%
Mean # of Activities	2.2	4.1	4.5	4.1
Base	3737	1032	532	501

Question: Which of these activities will you participate in while in the Willamette Valley? Please only include the activities that you have done or will do on THIS trip.

Base: All survey respondents. 6,326 responses.

Figure 16: Modes of Transportation Used

			Vacation	Bed &
		Hotel or	home/room	breakfast or
	Day Tripper	motel	rental	inn
Personal automobile	89.5%	48.3%	42.5%	35.7%
Rental car	7.6%	48.9%	56.0%	62.3%
Walk	3.2%	11.1%	15.2%	14.0%
Uber/Lyft or other ride sharing service	1.7%	8.2%	10.3%	7.6%
Limousine	1.9%	5.5%	4.3%	5.4%
Tour bus	1.8%	3.7%	4.7%	3.8%
Bicycle	0.5%	1.5%	3.8%	1.6%
Taxi	0.1%	1.3%	0.6%	1.2%
Helicopter	0.1%	0.1%	0.4%	0.6%
Base	3737	1032	532	501

Question: Which modes of transportation will you use in the Willamette Valley during this trip? Base: All survey respondents. 6,326 responses.

Figure 17: Important Trip Decision Factors

	Day Tripper	Hotel or motel	Vacation home/room rental	Bed & breakfast or inn
Tasting or buying Willamette Valley wines	84.3%	85.6%	89.3%	88.4%
Experiencing the ambiance and atmosphere of the Willamette Valley	72.7%	75.0%	83.8%	80.6%
Learning about Willamette Valley wines	35.8%	50.7%	60.3%	57.7%
Base	3724	1027	531	501

Question: Which of the following were important to your decision to visit wineries in the Willamette Valley? (Select all that apply) Base: All survey respondents. 6,301 responses.

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Figure 18: Most Important Trip Decision Factor

	Day Tripper	Hotel or motel	Vacation home/ room rental	Bed & breakfast or inn
Tasting or buying Willamette Valley wines	58.0%	57.5%	55.5%	57.6%
Experiencing the ambiance and atmosphere of the Willamette Valley	35.4%	32.0%	34.2%	31.7%
Learning about Willamette Valley wines	6.7%	10.5%	10.3%	10.7%
Base	3665	1018	524	495

Question: Which of these was the most important? Base: All survey respondents. 6,211 responses.

Figure 19: Important to Visiting Specific Wineries/Tasting Rooms

	Day Tripper	Hotel or motel	Vacation home/ room rental	Bed & breakfast or inn
Word-of-mouth recommendation	48.4%	59.3%	72.4%	67.6%
Scenic view	48.5%	41.4%	46.1%	41.6%
Convenient location	24.6%	22.0%	17.3%	18.0%
Easy to get to	24.4%	16.5%	15.6%	12.1%
Winery had a special event	26.8%	12.2%	10.7%	11.7%
Winery/vineyard tour	11.8%	24.6%	31.5%	29.5%
I heard that it was popular	5.7%	8.4%	10.1%	7.4%
I heard that it wasn't too crowded	6.1%	4.2%	5.6%	5.1%
Base	3563	968	514	488

Question: Which of the following were important to your decision to visit specific wineries/tasting rooms in the Willamette Valley? (Select all that apply) Base: All survey respondents. 6,023 responses.

Figure 20: Likelihood to Return to Willamette Valley

	Day Tripper	Hotel or motel	Vacation home/room rental	Bed & breakfast or inn
Top-Two Box Score	98.9%	95.9%	96.4%	95.4%
Very likely	95.3%	82.6%	83.6%	77.2%
Likely	3.6%	13.3%	12.8%	18.2%
Neutral	0.6%	3.1%	2.4%	2.4%
Unlikely	0.2%	0.5%	0.6%	1.2%
Very unlikely	0.0%	0.0%	0.2%	0.4%
I don't know	0.3%	0.5%	0.4%	0.6%
Base	3713	1030	531	501

Figure 21: Willamette Valley Wine Club Member

	Day Tripper	Hotel or motel	Vacation home/room rental	Bed & breakfast or inn
Yes	69.7%	41.3%	39.3%	35.9%
No	30.3%	58.7%	60.7%	64.1%
Base	3735	1031	532	501

Question: How likely are you to return to the Willamette Valley? Base: All survey respondents. 6,294 responses.

Question: Prior to this visit, were you a member of any Willamette Valley wine clubs? Base: All survey respondents. 6,232 responses.

Figure 22: Joined Willamette Valley Wine Club on Trip

	Day Tripper	Hotel or motel	Vacation home/room rental	Bed & breakfast or inn
Yes	14.7%	35.3%	45.7%	45.3%
No	85.3%	64.7%	54.3%	54.7%
Base	3563	968	514	488

Question: Did you join any Willamette Valley wine clubs while on this most recent trip? Base: All survey respondents. 6,023 responses.

Figure 23: Likelihood of Joining A Wine Club

		Hotel or		Bed & breakfast or
	Day Tripper	motel	rental	inn
Top-Two Box Score	57.8%	51.0%	56.6%	55.5%
Very likely	30.8%	26.7%	31.0%	29.3%
Likely	26.9%	24.3%	25.6%	26.1%
Neutral	23.0%	23.7%	25.4%	22.0%
Unlikely	7.5%	11.2%	8.6%	11.4%
Very unlikely	5.4%	7.3%	4.9%	6.0%
I don't know	6.4%	6.9%	4.5%	5.2%
Base	3727	1030	532	501

Question: How likely are to you join a Willamette Valley wine club in the future? Base: All survey respondents. 6,314 responses.

Figure 24: Likelihood of Recommending Willamette Valley

Mean Score on 10-Point Scale	Day Tripper	Hotel or motel	Vacation home/room rental	Bed & breakfast or inn
I am very likely to recommend a trip to the Willamette Valley to others.	9.4	9.4	9.5	9.4
I am very likely to recommend Willamette Valley wines to others.	9.3	9.2	9.4	9.2
After this visit, I am much more likely to select Willamette Valley wines in restaurants, bars, and/or retail stores.	8.2	8.5	8.7	8.6
A special event or festival would motivate me to return to the Willamette Valley.	8.1	7.3	7.4	7.0

Question: I'm going to read you a few statements. Please rate your agreement with each on a 10-point scale, where "1" represents "Completely Disagree" and "10" represents "Completely Agree." Base: All survey respondents. 6,301 responses.

Figure 25: Desired Wine Region to Visit

	Day Tripper	Hotel or motel	Vacation home/room rental	Bed & breakfast or inn
Walla Walla, Washington	48.2%	36.6%	39.0%	37.5%
Napa Valley, California	24.4%	29.6%	23.7%	26.1%
Sonoma County, California	20.7%	28.0%	31.6%	29.3%
NONE OF THESE	6.7%	5.8%	5.6%	7.0%
Base	3728	1028	531	501

Question: Which of these wine regions would you most like to visit? Base: All survey respondents. 8,067 responses.

Figure 26: Frequency of Wine Consumption

	Day Tripper	Hotel or motel	Vacation home/roo m rental	Bed & breakfast or inn
Every day	24.2%	33.1%	32.1%	38.1%
A few times a week	50.1%	49.8%	54.1%	48.2%
About once a week	13.5%	10.4%	7.8%	9.2%
Several times a month	8.0%	5.0%	4.3%	2.5%
About once a month	2.7%	1.1%	1.6%	1.0%
Once every 2-3 months	0.9%	0.2%	0.2%	0.2%
Less often than once every 2-3 months	0.4%	0.3%	0.0%	0.4%
I don't drink wine	0.3%	0.1%	0.0%	0.4%
Base	3564	968	514	488

Question: On average, how often do you drink wine? Base: All survey respondents. 7783 responses.

Figure 27:Wine Purchase Frequency

		Wee	ekly		Monthly			Several times per year				Less th	an severa	ıl times p	er year	Never				
	Vacation home/				Vacation home/			Vacation home/			Vacation home/				Vacation home/					
	Day Tripper	Hotel or motel	room rental	B&B or inn	Day Tripper	Hotel or motel	room rental	B&B or inn	Day Tripper	Hotel or motel	room rental	B&B or inn	Day Tripper	Hotel or motel	room rental	B&B or inn	Day Tripper	Hotel or motel	room rental	B&B or inn
\$50 or more	1.1%	3.1%	4.3%	3.3%	7.2%	14.9%	13.8%	14.3%	29.8%	34.2%	33.9%	35.5%	34.8%	30.2%	31.7%	32.0%	27.0%	17.7%	16.3%	15.0%
\$30 - \$49.99	2.6%	5.4%	6.4%	5.9%	15.6%	25.2%	26.3%	24.2%	42.3%	40.3%	40.5%	41.0%	28.6%	21.1%	21.2%	24.6%	11.0%	8.1%	5.6%	4.3%
\$20 - \$29.99	6.3%	11.1%	11.3%	11.9%	25.4%	31.8%	36.4%	35.2%	45.8%	38.1%	37.9%	35.5%	18.3%	15.3%	12.6%	13.5%	4.2%	3.7%	1.8%	3.9%
\$14 - \$19.99	14.5%	20.1%	17.9%	17.4%	30.5%	30.2%	34.8%	35.7%	31.6%	25.1%	26.3%	21.9%	17.0%	16.8%	15.4%	17.0%	6.4%	7.7%	5.6%	8.0%
Under \$14	20.7%	22.0%	20.8%	22.5%	21.7%	19.4%	21.4%	18.2%	19.0%	15.7%	13.2%	11.9%	21.3%	21.8%	28.0%	19.3%	17.3%	21.1%	16.5%	28.1%