

Oregon Wine Tourists Columbia Gorge

REGIONAL WORKSHOP – MAY 21

Institute for Policy Research & Engagement

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1 WORD TO DESCRIBE THE COLUMBIA GORGE

Workshop participants were asked to provide one word they would use to describe the Rogue Valley.

Spectacular-beauty (✓✓)

Scenic (✓)

Dynamic

Friendly

Diverse

Undiscovered

Welcoming

Majestic

Unique

Energetic

Transitional

Nature (✓)

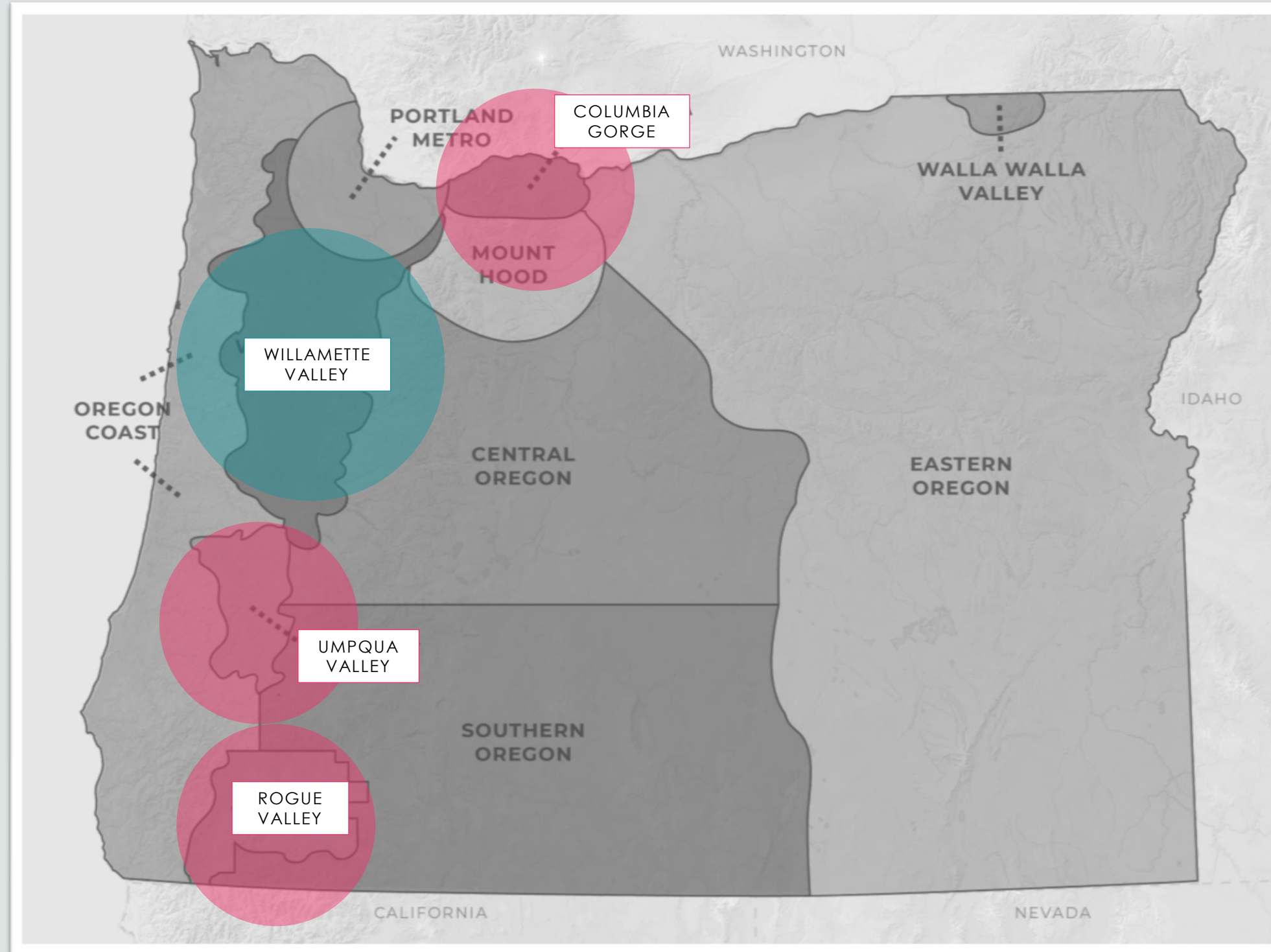
Windy

Amazingly adventurous

Discovery

Inspiring

STUDY AREAS



● UO/OWB
Regions of Study

● Willamette
Valley Wineries
Association
(WVWA)
Region of Study

SURVEY METHODOLOGY

Between August 2018 and March 2019, wineries and their partners worked to distribute the Winery Visitor survey to Columbia Gorge winery visitors.



7 wineries

&



2 partners

distributed the survey resulting in over **900 responses** in the
Columbia River Gorge.

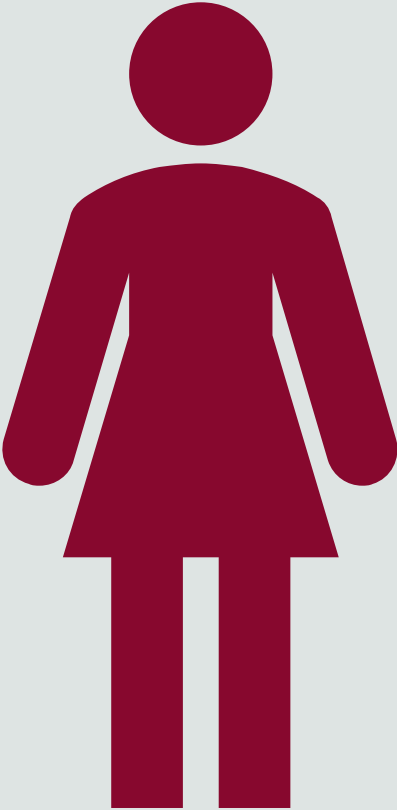
Who are Gorge
winery visitors?



Who is the Gorge wine tourist?

VISITORS
94%

Survey respondent demographics



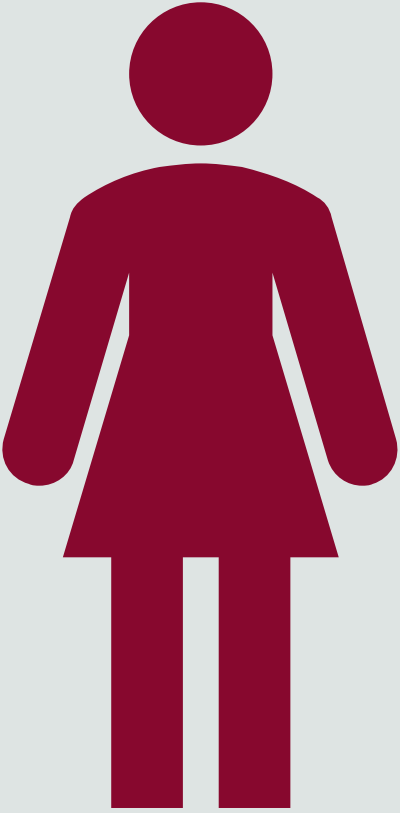
*A “non-local” visitor is defined as someone who traveled 50 miles or more to their destination.

Who is the Gorge wine tourist?

Survey respondent demographics

VISITORS
94%

GENDER
68%
Female



Who is the Gorge wine tourist?

Survey respondent demographics

VISITORS
94%

GENDER
68%
Female

ETHNICITY
89%
White



Who is the Gorge wine tourist?

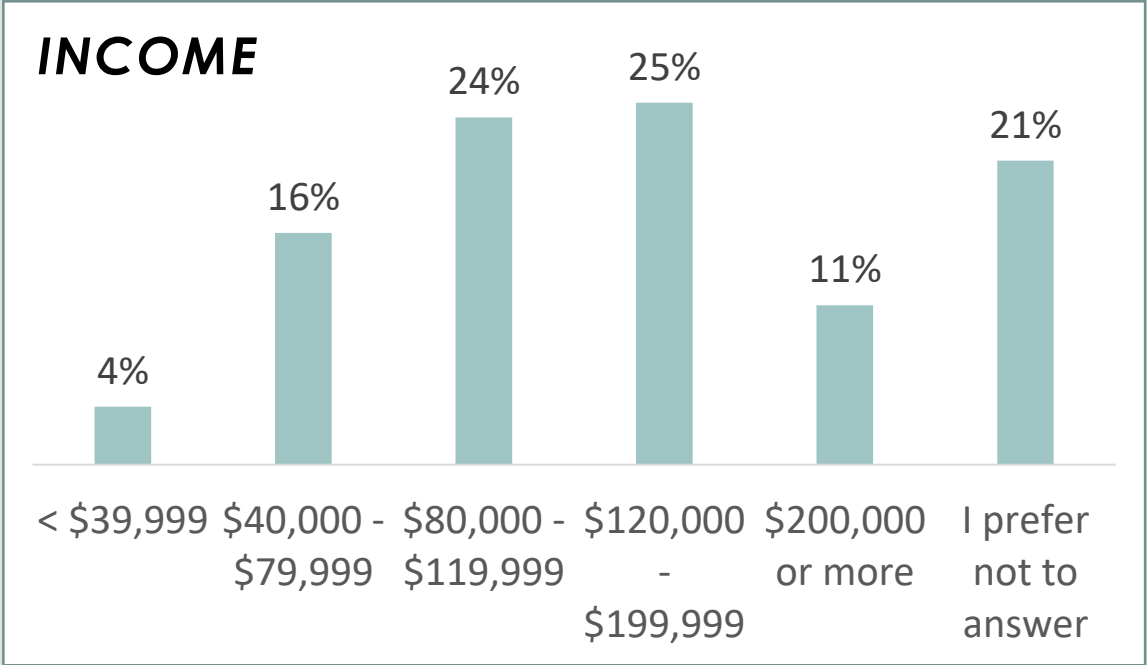
Survey respondent demographics



VISITORS
94%

GENDER
68%
Female

ETHNICITY
89%
White



Who is the Gorge wine tourist?

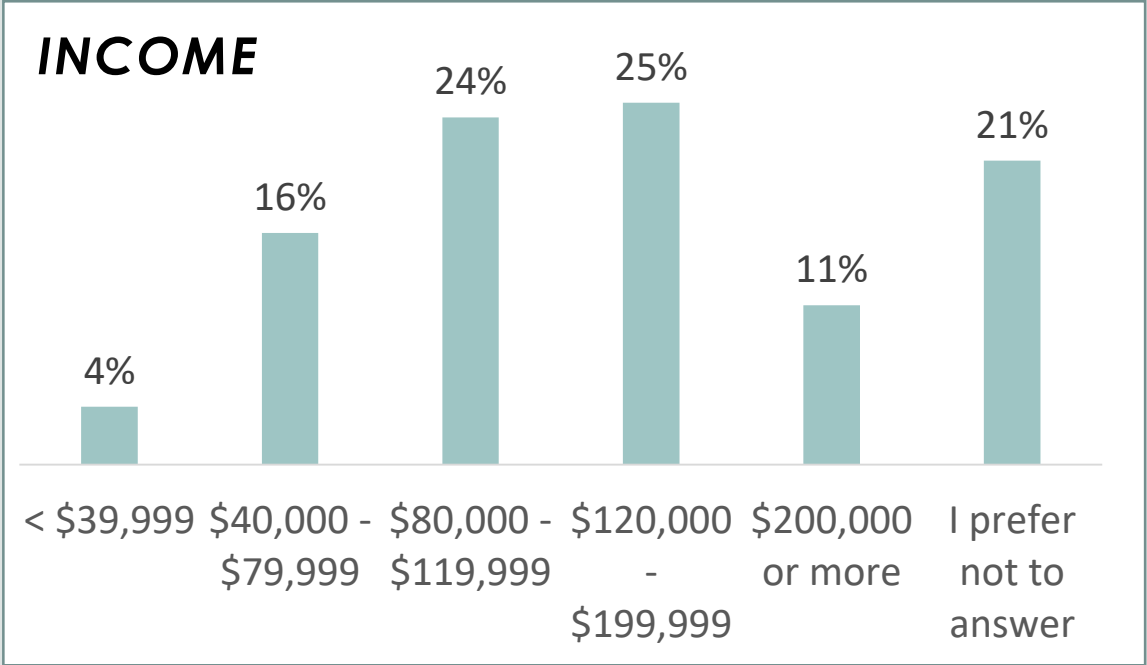
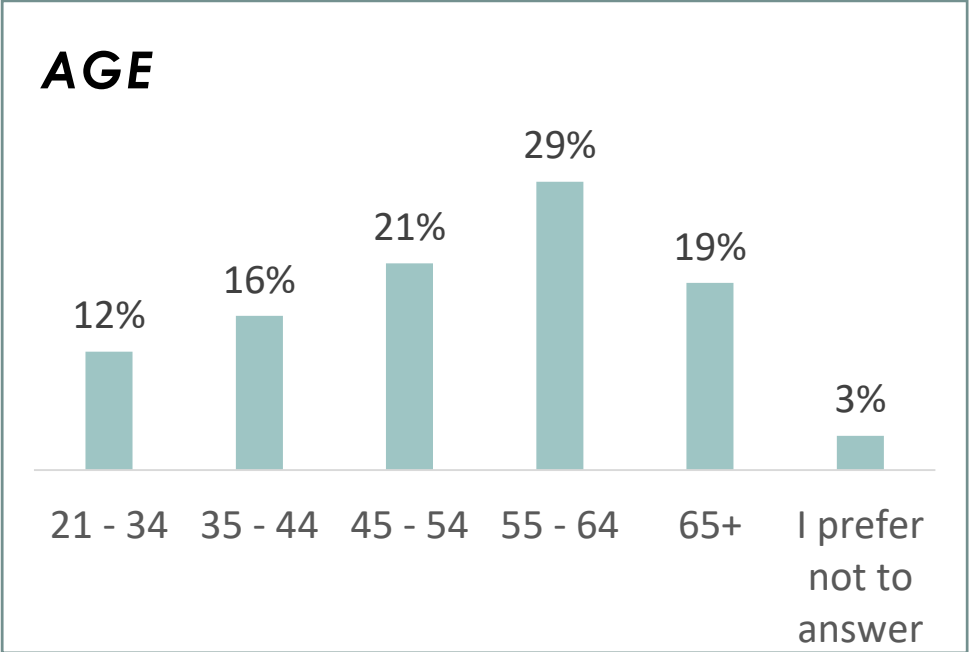
Survey respondent demographics



VISITORS
94%

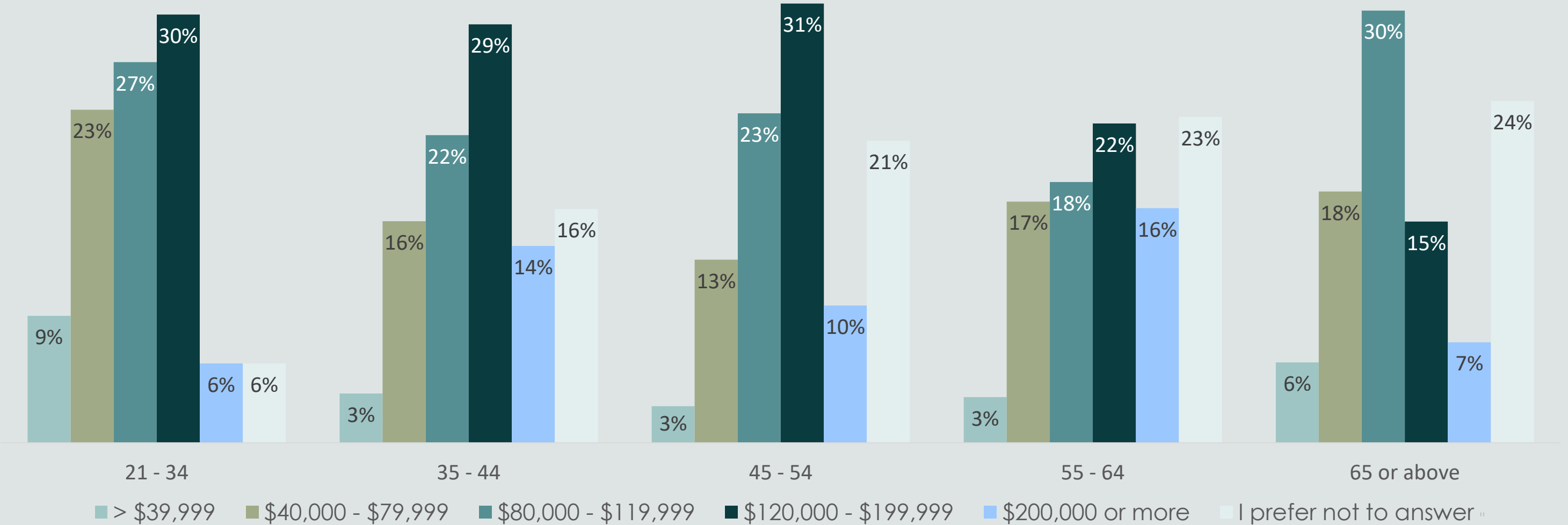
GENDER
68%
Female

ETHNICITY
89%
White

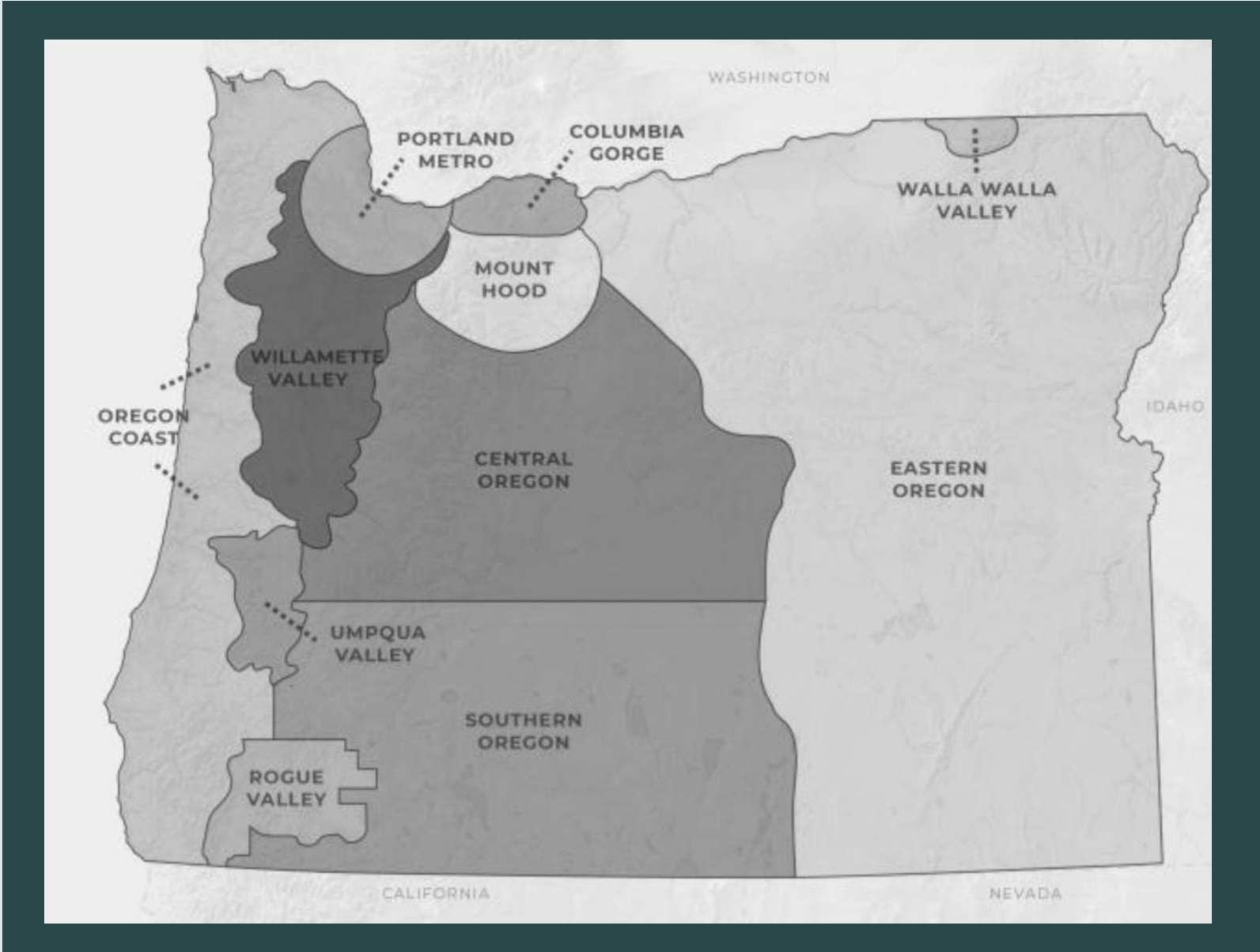
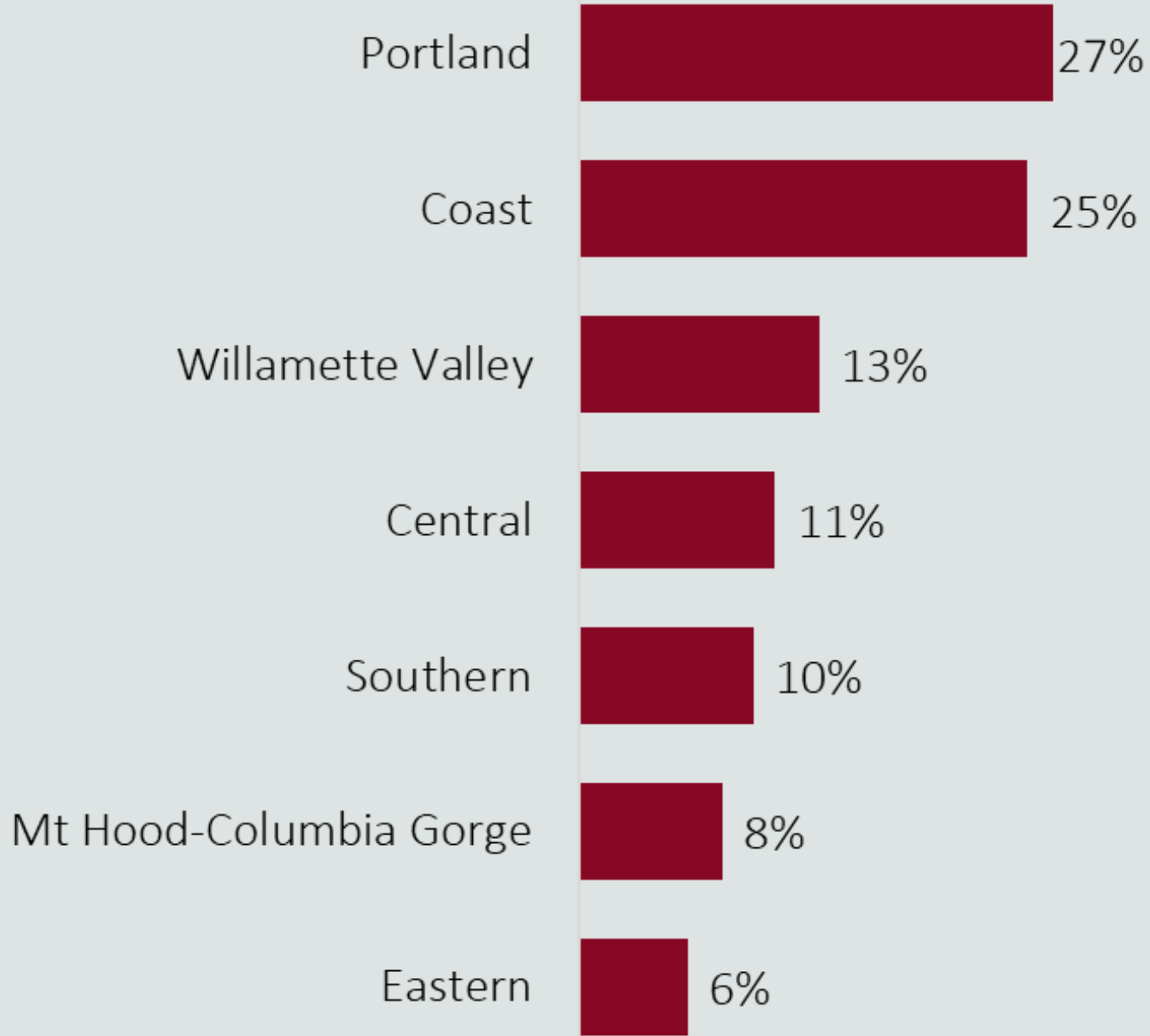


Who is the Gorge wine tourist?

Income by age group

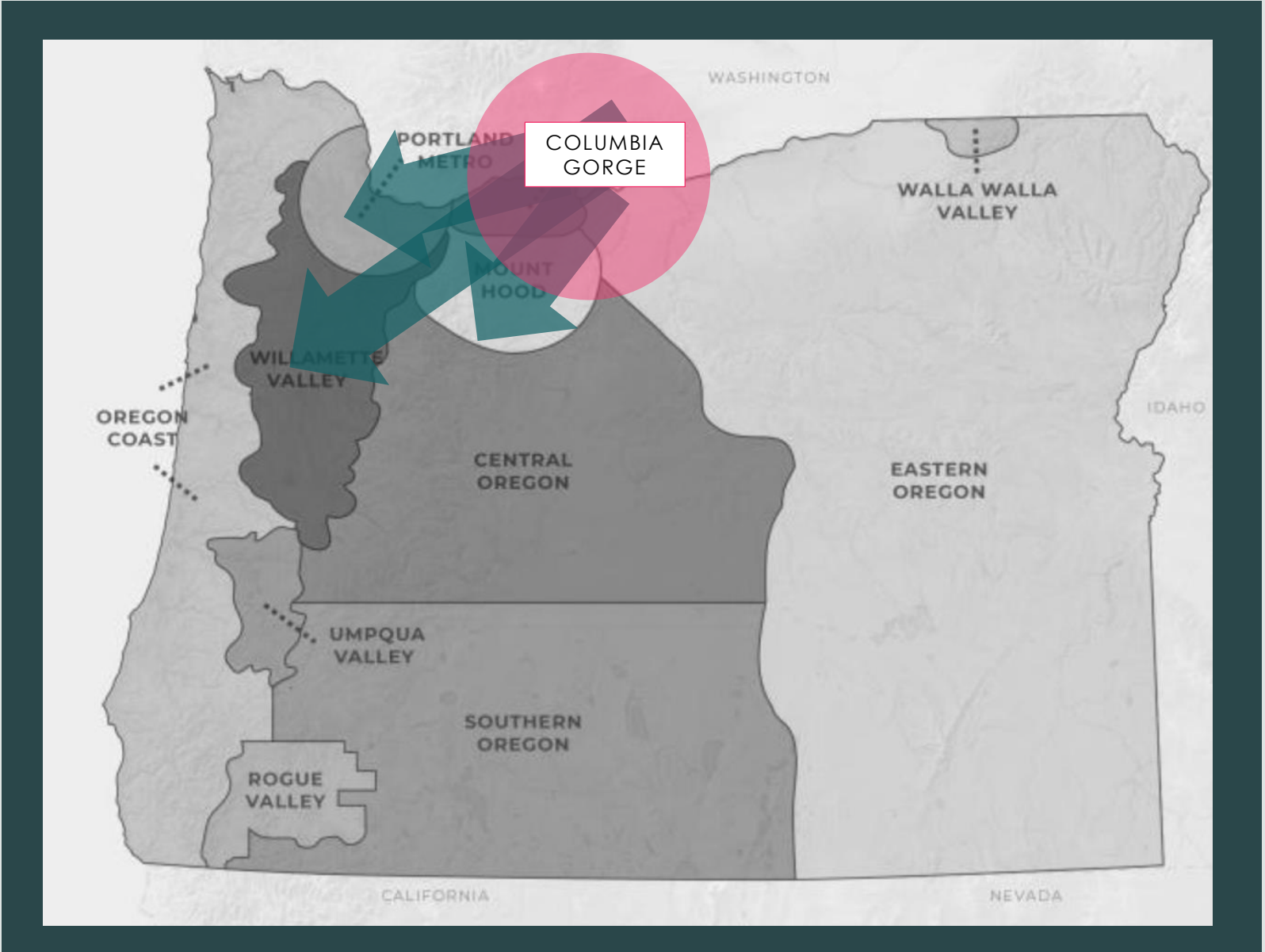
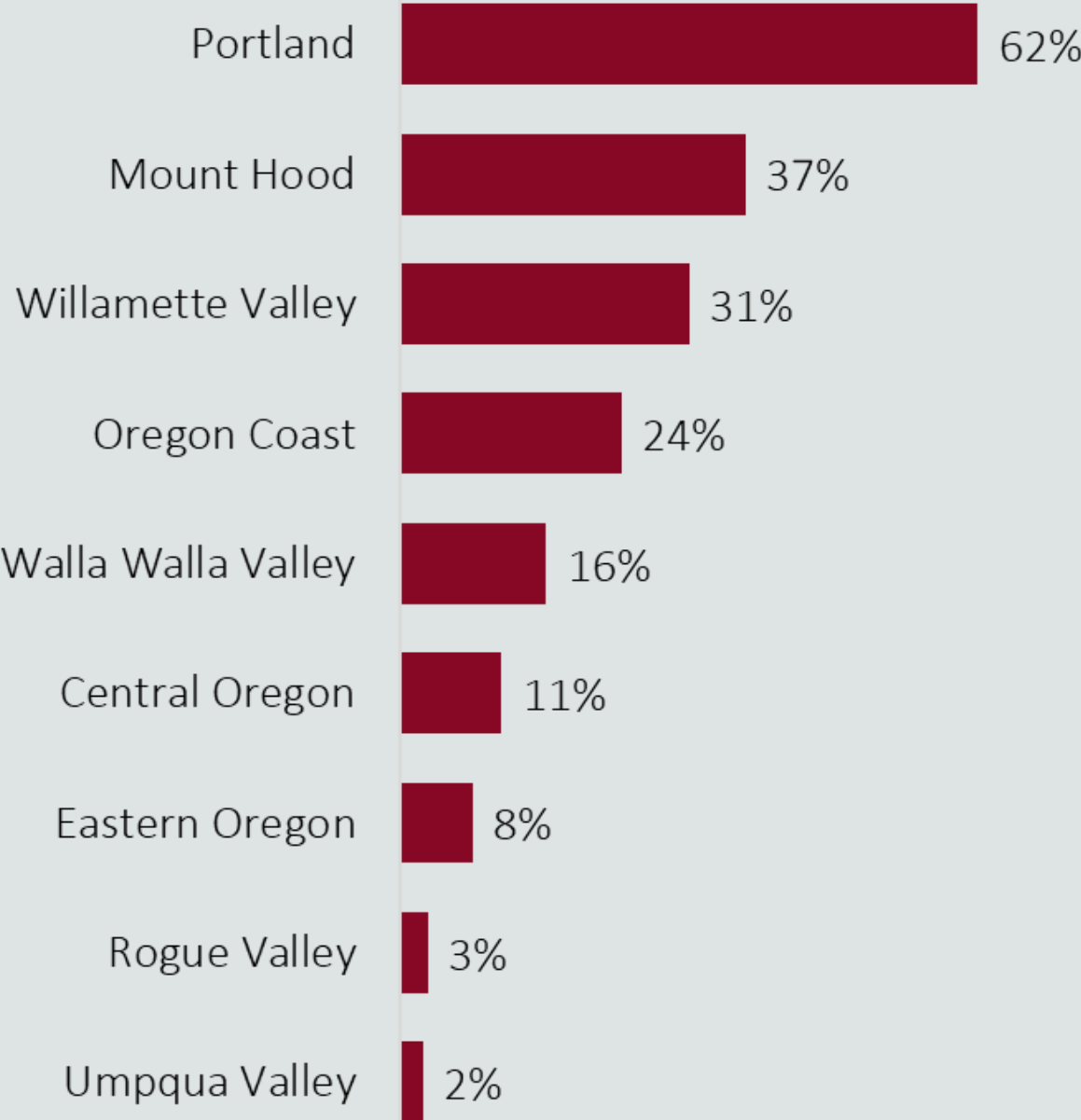


Where do Oregon visitors go?



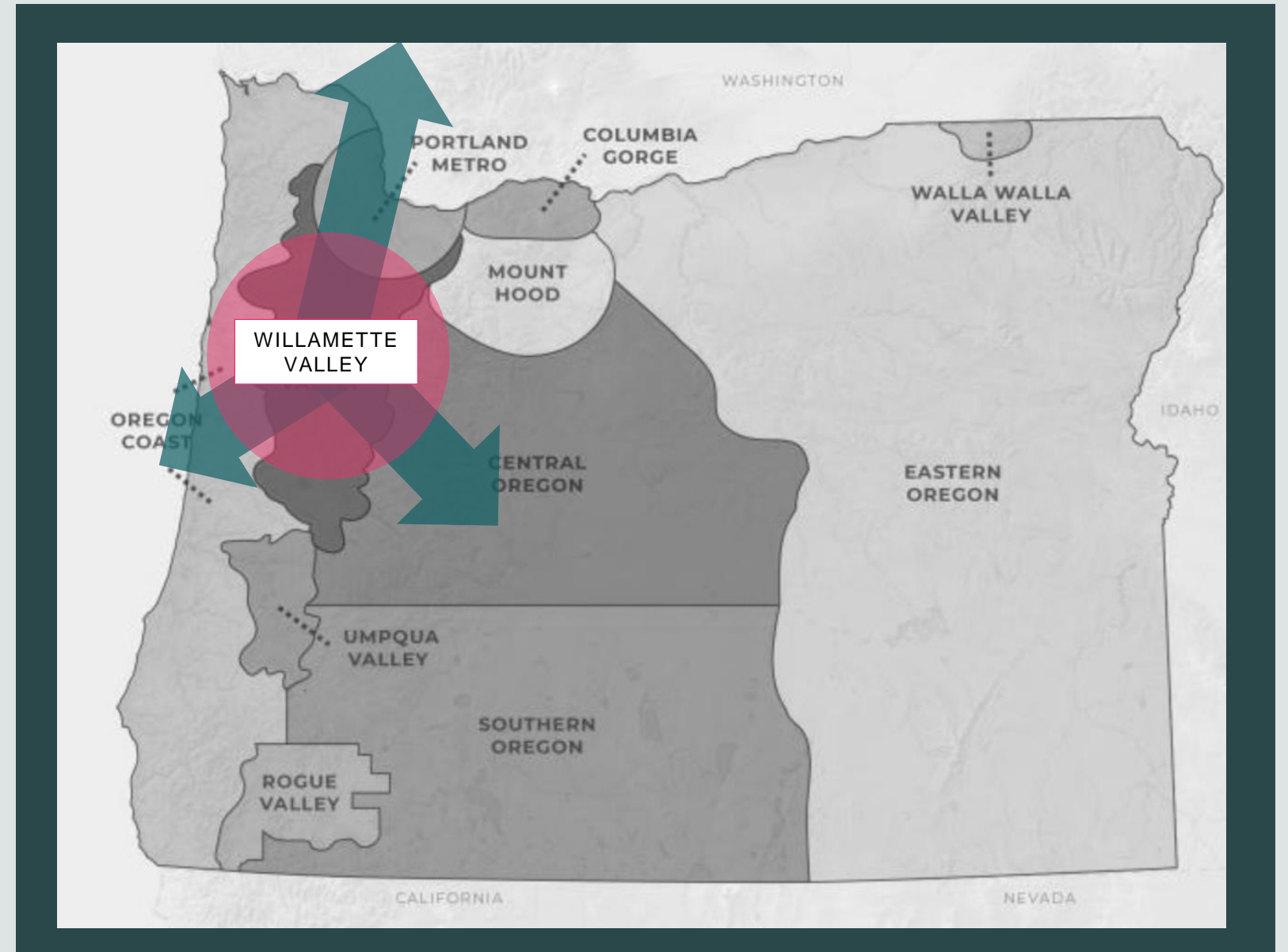
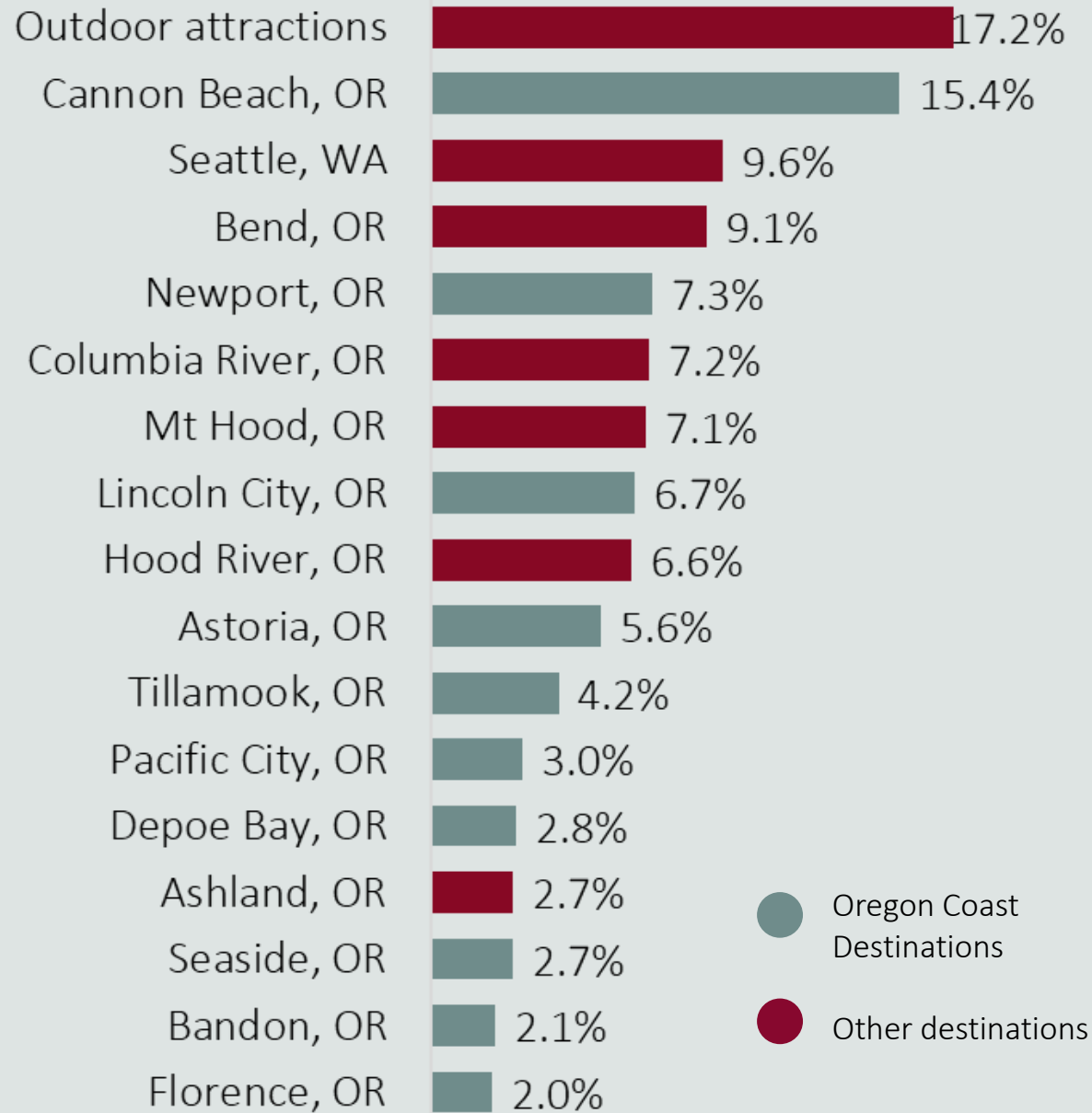
Source: Oregon Visitor Report: 2017, Longwoods International

Where are Gorge wine visitors going?



Source: UO IPRE/OWB Study, 2018-2019

Where are Willamette wine visitors going?



Key Insights

Wine visitors go to other destinations that are in close proximity to their wine destination.

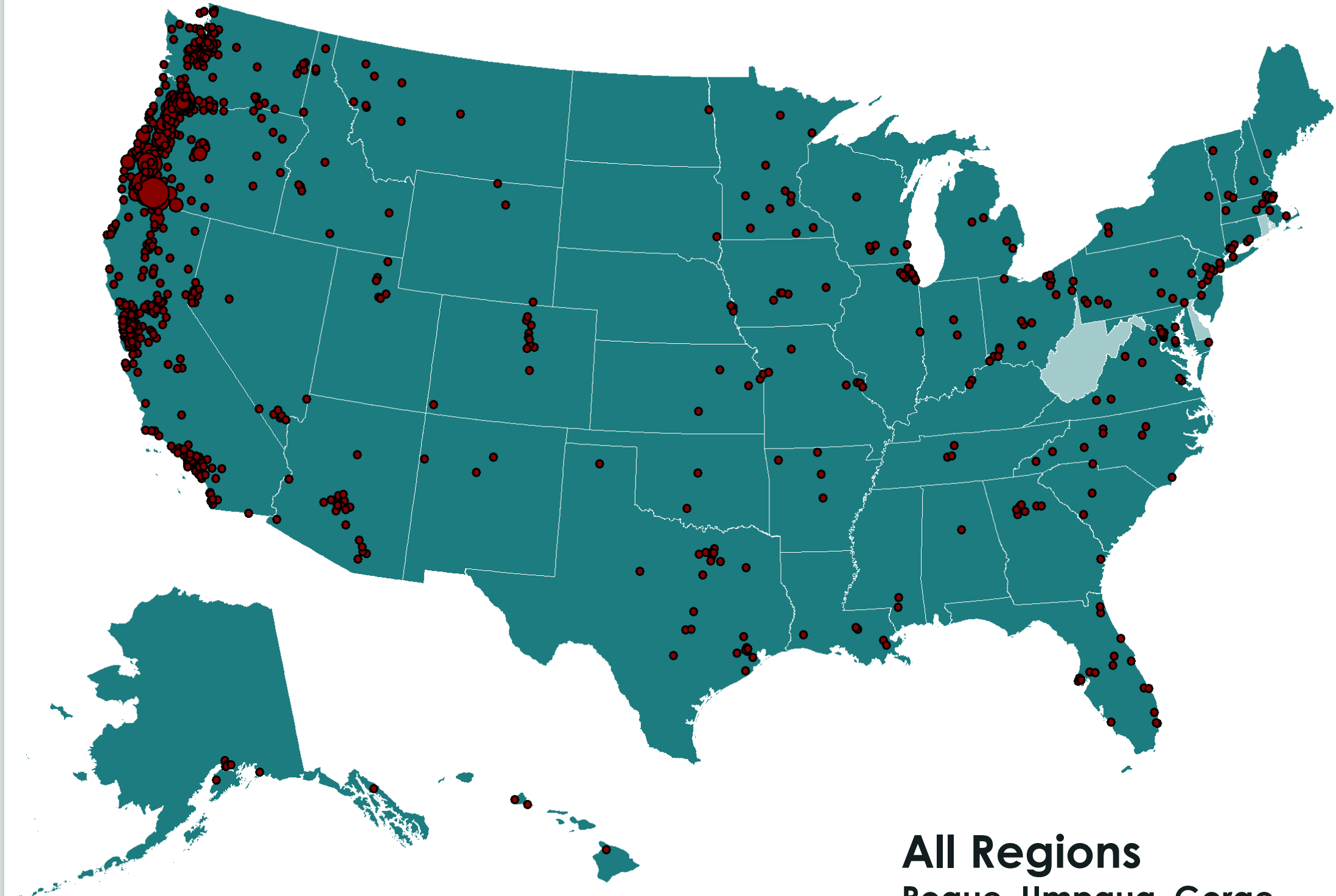
- 62% of Gorge wine visitors reported they were visiting Portland on the same trip they visited a winery. 37% said they were also visiting the Mount Hood area.
- As a comparison, 21% of WV wine visitors said they were also visiting a destination in the Columbia Gorge. 51% said they were also visiting a city on the coast.
- There could be an opportunity to cross-market with wineries in the Willamette Valley to draw more WV visitors to the Gorge.

Where do visitors come from?

We mapped respondent origin using answers to the question: “Where do you currently live? Please provide your home ZIP code.”

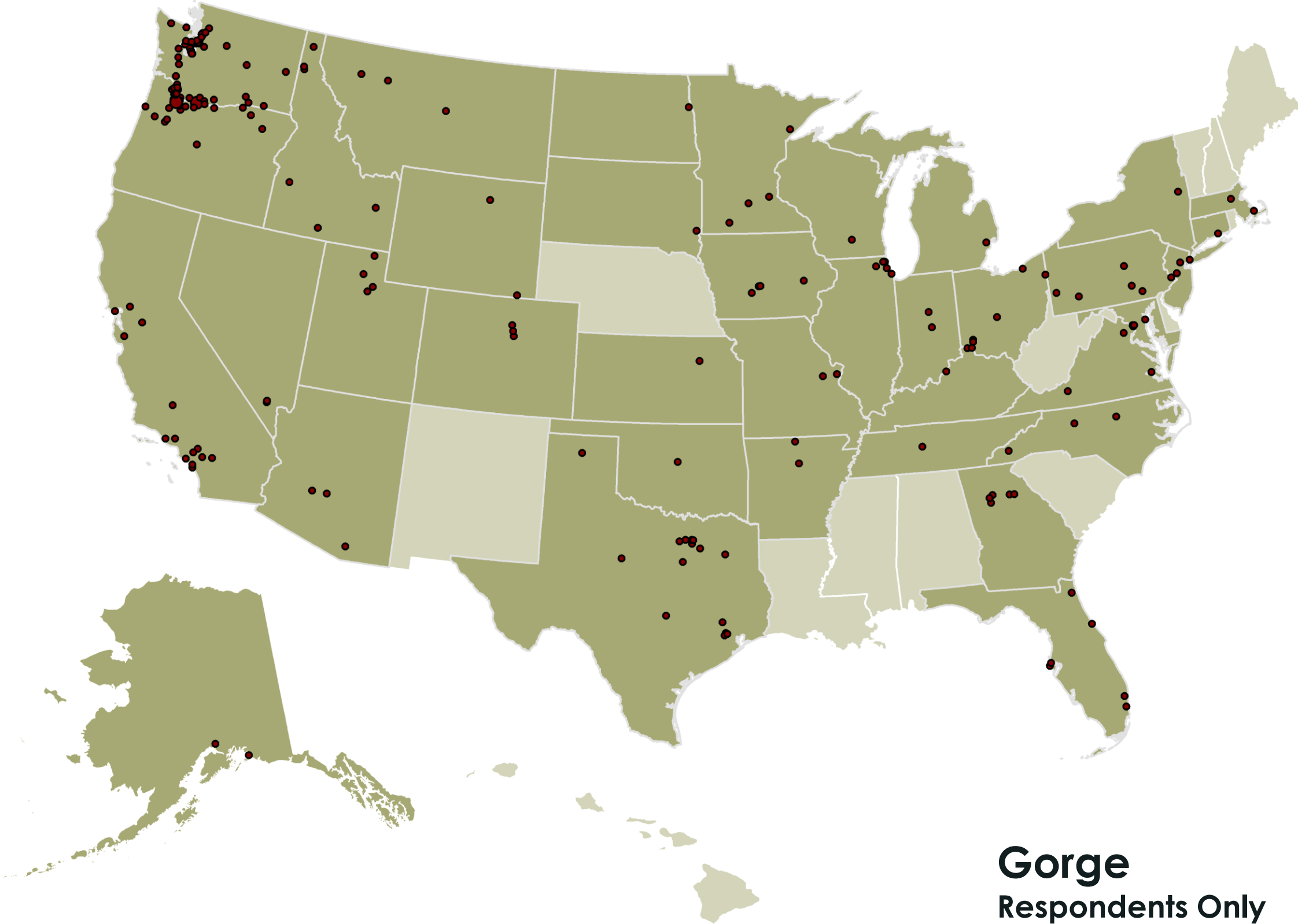
SURVEY RESPONDENT ORIGIN

The survey received responses from all states except West Virginia, Delaware, and Rhode Island.

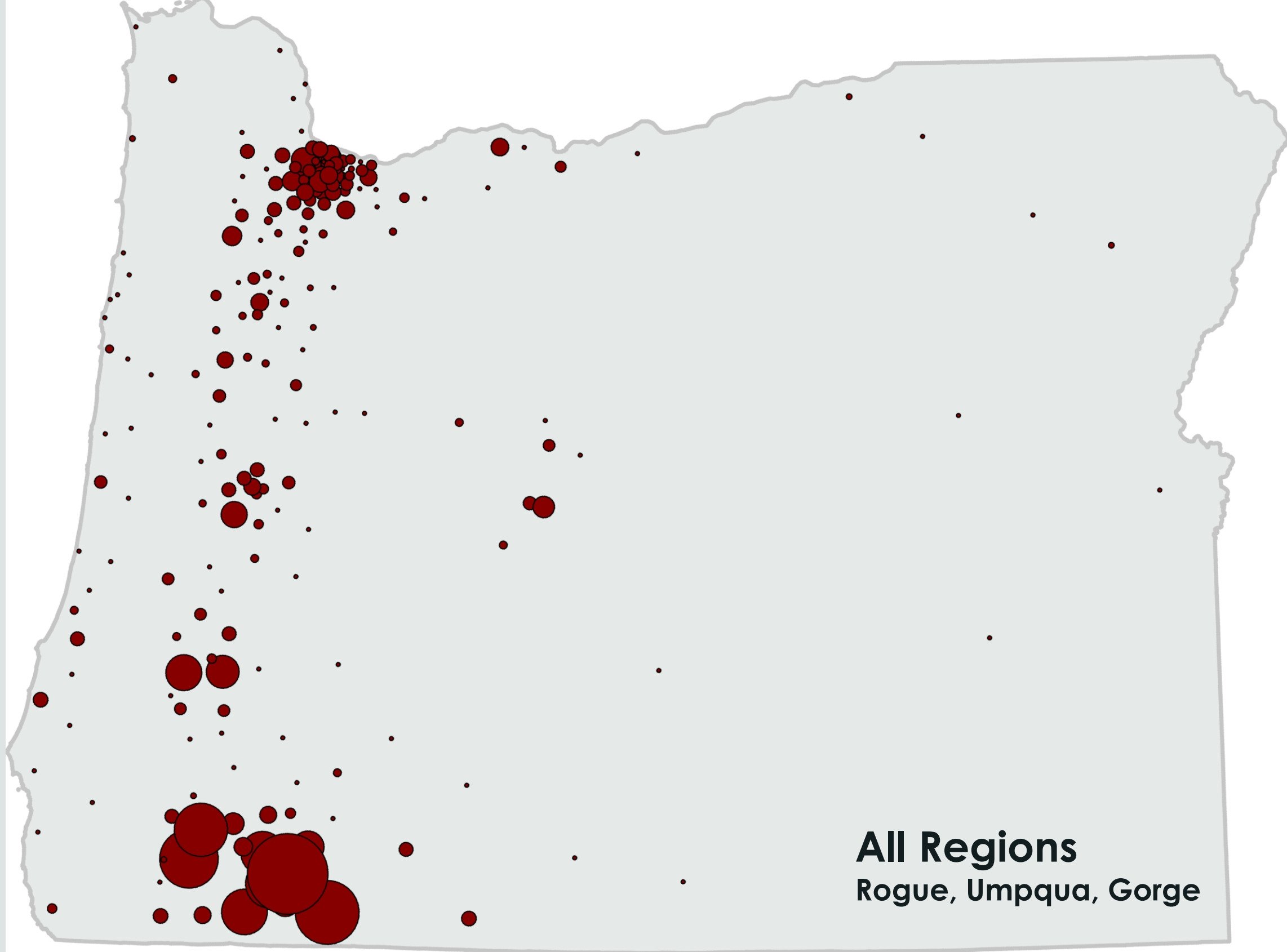


All Regions
Rogue, Umpqua, Gorge

**SURVEY
RESPONDENT
ORIGIN**



**SURVEY
RESPONDENT
ORIGIN**



All Regions
Rogue, Umpqua, Gorge

How did they find a winery to visit?



Word of Mouth



Wine publication



Website of winery



Free travel guide/map



Road signs or billboards

Gorge

47%

20%

19%

14%

13%

Willamette

43%

15%

22%

23%

14%

Key Insights

- A majority of wine tourists rely on word of mouth recommendations to choose which wineries to visit
- Wine tourists also use wineries' websites and free travel guides/maps, but at higher rates in the Willamette Valley than other regions
- Social media is currently not a popular resource among wine tourists
 - 7% in the Gorge, Umpqua, and Rogue
 - 12% in the Willamette Valley

How are they getting there?

87%
Gorge

74%
Willamette Valley

Personal automobile



Gorge Willamette

7%

24%

6%

7%

2%

3%

Where are they staying?



Gorge Willamette



Hotel

55%

40%



With friends or family

10%

12%



Airbnb or VRBO

10%

19%



Bed & Breakfast

5%

21%

40%

Gorge

41%

Willamette

Stayed overnight

2.4

Gorge

1.3

Willamette

Average nights stayed

What are they doing?

“What other activities did you participate in while on your trip?”



Dining



Shopping



Outdoor recreation



Festival or special event



Brewery or distillery

Gorge

73%

32%

34%

9%

37%

Willamette

59%

22%

17%

7%

16%

How many wineries did they visit?

“How many wineries did you visit or buy wine at as part of your trip?”

In the Columbia Gorge, most visitors went to 1, 2, or 3 wineries

One winery: 23%

Two wineries: 27%

Three wineries: 28%

Four or more wineries: 22%

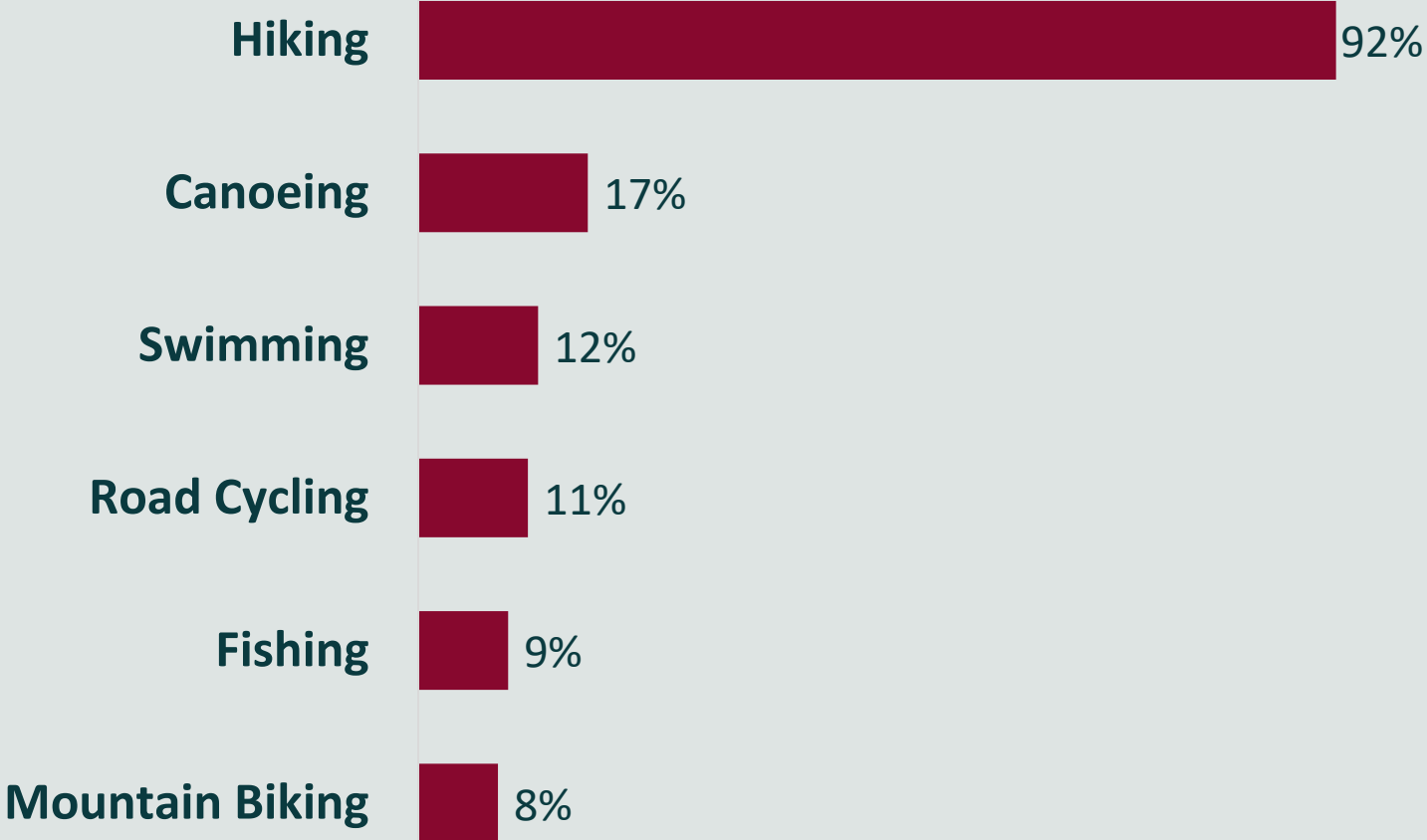
Outdoor Recreation Activities

Of those who participated in outdoor recreation on their trip to the Gorge.



National Park Foundation

Gorge



What are they spending on?

Spending reported per party, per day

Dining



Lodging



Shopping



Transportation



Recreation



Gorge

\$82

\$73

\$23

\$23

\$3

Rogue

\$70

\$32

\$21

\$16

\$2

Umpqua

\$63

\$41

\$17

\$19

\$2

Willamette Valley

\$123

\$104

\$33

\$39

\$14

What are they spending on?

Spending reported per party, per day



Tasting Fees



Wine Purchases

Gorge	\$20	\$124
Rogue	\$12	\$102
Umpqua	\$10	\$145
Willamette Valley	\$35	\$194

Spending Methodology

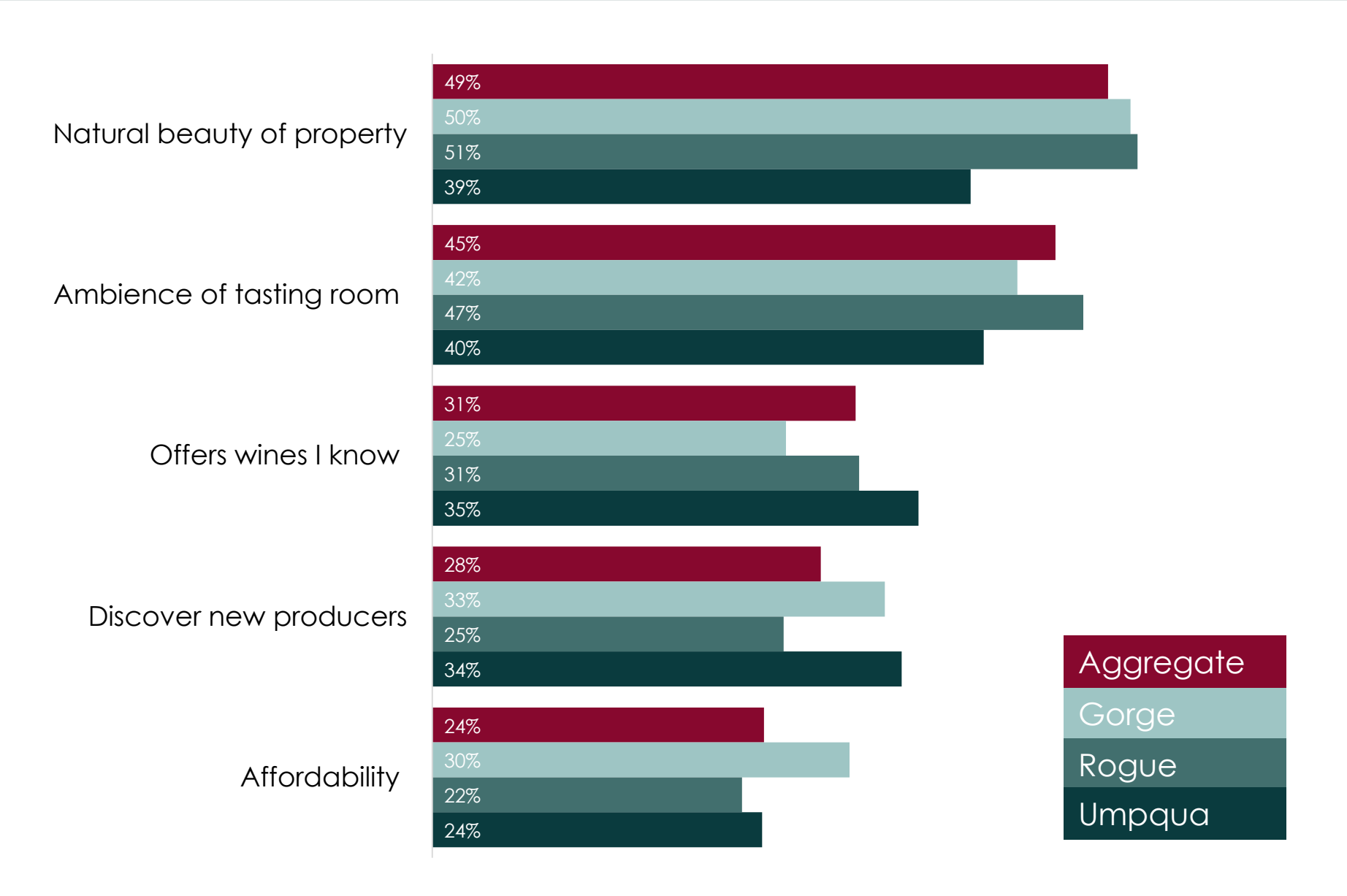
Why are wine tourists spending more in the Willamette Valley?

- Cross tabulation specification difference

In short, there are methodology differences between the tabulation and reporting of statistics of the two reports. Please see the WVWA report for more detail on Willamette Valley wine tourist spending.

What winery qualities do they seek out?

In general, which of the following reasons are most important to you in choosing which wineries to visit? *Respondents could select three options.





**Regional findings:
Columbia Gorge**

Regional wine quality perceptions

How would you rate the quality of wine that comes from the region?

Respondents to this question had visited a winery in Columbia Gorge.

	<i>One of the best</i>	<i>Excellent</i>	<i>Good</i>	<i>Average</i>	<i>Poor</i>	<i>Undecided/ Not familiar</i>
Willamette Valley	34%	43%	15%	3%	0%	5%
Napa Valley	22%	39%	23%	4%	0%	11%
Walla Walla Valley	19%	36%	16%	2%	0%	26%
Columbia Gorge	14%	50%	29%	4%	0%	3%
Paso Robles	8%	23%	18%	4%	0%	47%
Rogue Valley	2%	24%	26%	4%	0%	44%
Umpqua Valley	2%	20%	25%	5%	0%	48%

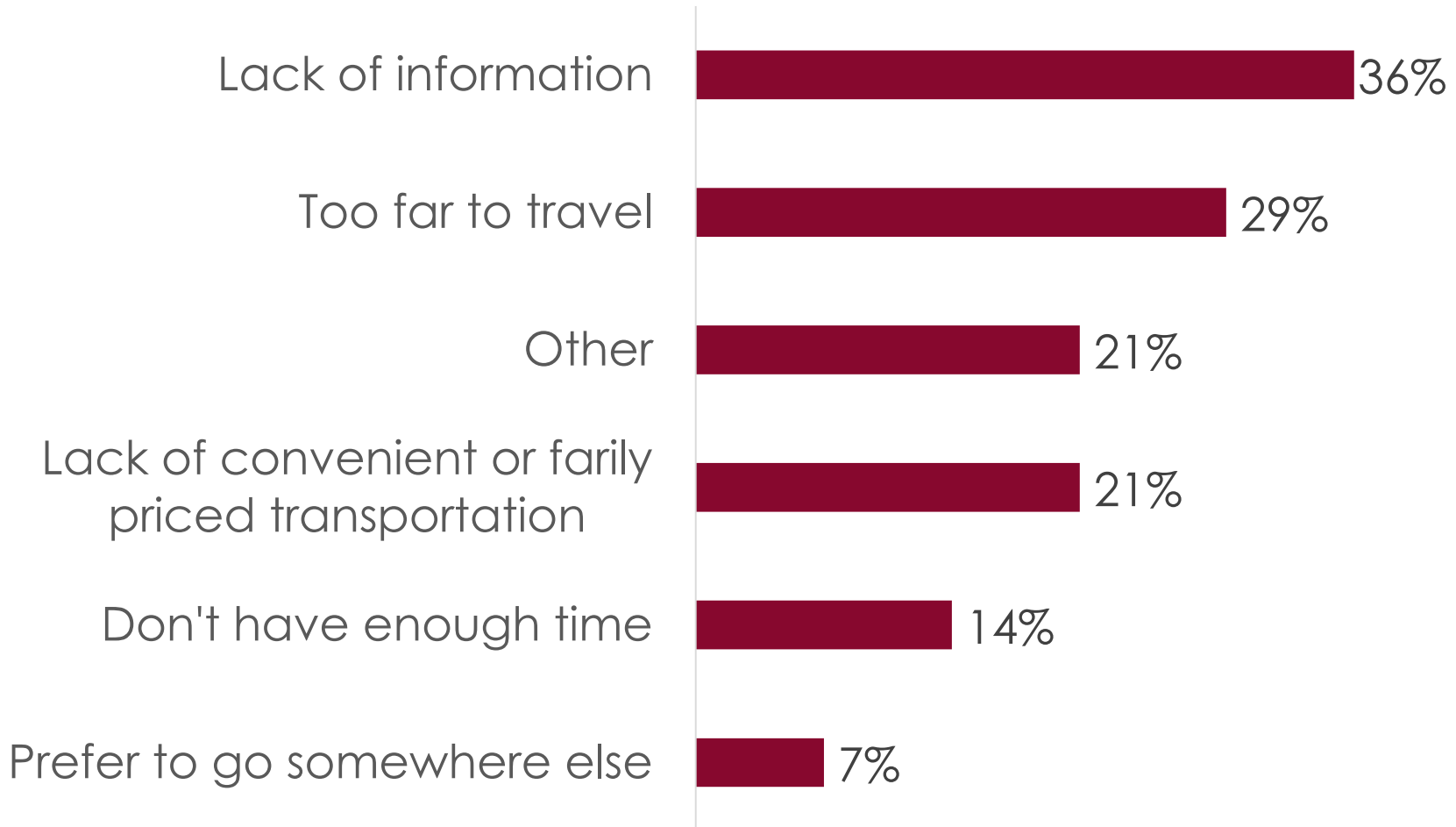
Regional wine attributes

What attributes would you associate with each of these three region's wines?

	Gorge	Willamette	Rogue Valley
The wines are good value for the money	48%	36%	17%
Produces a wide variety of wines	45%	40%	14%
Many small artisanal producers	41%	43%	16%
Different from other regions, a distinct style	39%	44%	17%
Sustainable, organic, or ecologically beneficial growing practices	37%	49%	13%
A reliable choice, even if you aren't familiar with the specific winery	37%	51%	12%
Prestigious or highly regarded by knowledgeable wine consumers	28%	64%	8%
I don't know enough about this region to select attributes	14%	15%	71%

Barriers to visitation

What factors have prevented you from visiting the Columbia Gorge?



Respondents to this question were not local and had never visited the region.

DISCUSSION

How do these findings differ from or align with your expectations?





Visitor Persona
Speed Networking!

Visitor personas

- Oregon resident
- Out-of-state visitor
- Gorge visitor
- Paid lodging visitor
- Millennial
- Outdoor enthusiast
- Day tripper

Data reported on the following Visitor Personas is from all regions (Rogue, Umpqua, and Columbia Gorge), with the exception of "Gorge visitor" which contains data specific to of non-local Gorge wine tourists

Oregon local

(n = 2,962)

Age: **65 or above** (30%)
 Race/Ethnicity: **White** (89%)
 Gender: **Female** (66%)

Bottles purchased

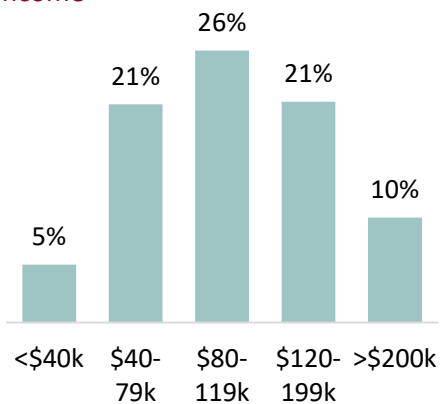
4.95

(average)

83%

visited
1-3 wineries
 while on their trip

Income



Trip characteristics

78% say that **visiting wineries was the primary reason for their trip.**

22% were on **overnight trips.**

Oregon residents spend about **\$249 per day** per party during their trips.

When selecting a winery, they seek:

- Natural beauty of property (50%)
- Ambience, quality of tasting room (46%)
- Wines the visitor knows and likes (32%)

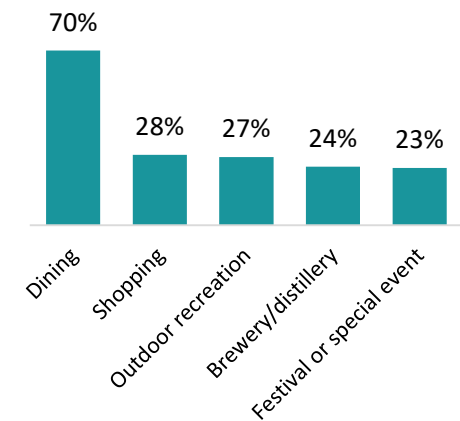
Once at a winery, they most enjoy:

- Staff friendliness / hospitality (68%)
- Attractiveness of facility / grounds (38%)
- Ambience / social atmosphere (37%)



Activities

Oregon resident's favorite activities to enjoy while on their winery trip are:



Social media habits

When using social media to find wineries, they turn to...



92%

Facebook



39%

Instagram



10%

Pinterest



7%

Twitter

Out-of-state visitor

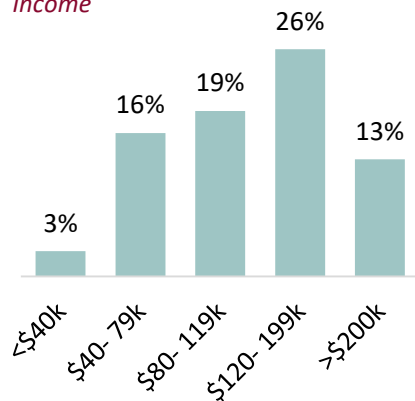
(n = 855)

Age: **55 to 64 (36%)**
 Race/Ethnicity: **White (87%)**
 Gender: **Female (58%)**

Home state

California	Washington	Nevada
37.7%	29.6%	3.7%

Income



Bottles purchased

7.09
(average)

68%
visited
1-3 wineries
while on their trip

When selecting a winery, they seek:

- Natural beauty of property (46%)
- Ambience, quality of tasting room (41%)
- Opportunity to discover new producers (38%)

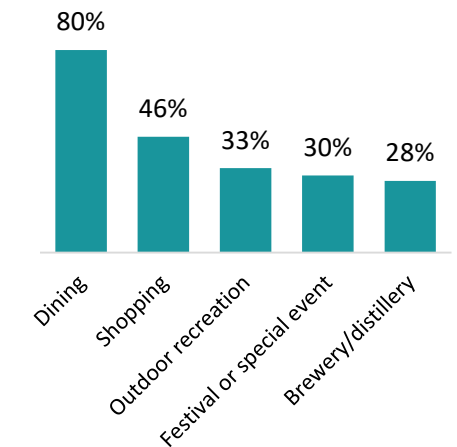
Once at a winery, they enjoy:

- Staff friendliness / hospitality (66%)
- Presentation / wine knowledge of host (44%)
- Attractiveness of facility / grounds (35%)



Activities

Their favorite activities to enjoy while on their winery trip are:



Trip characteristics

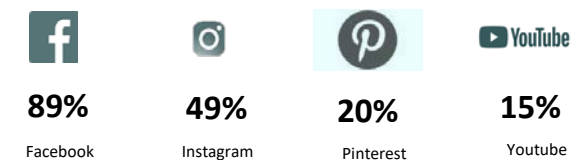
49% say that **visiting wineries was the primary reason for their trip.**

69% were on **overnight trips.**

Out-of-state visitors spend about **\$361 per day** per party during their trips.

Social media habits

When using social media to find wineries, they turn to...



Gorge visitor

(n = 644)

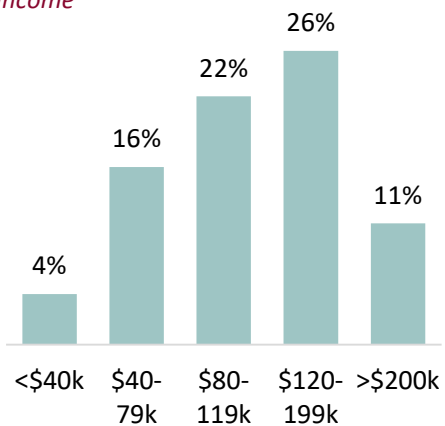
Age: **35 to 44 (35%)**
 Race/Ethnicity: **White (90%)**
 Gender: **Female (68%)**

Bottles purchased

5.46
(average)

76%
visited
1-3 wineries
while on their trip

Income



When selecting a winery, they seek:

- Natural beauty of property (52%)
- Ambience, quality of tasting room (43%)
- Opportunity to discover new producers (37%)

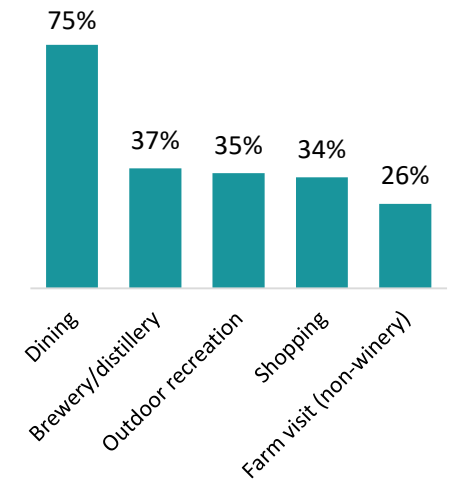
Once at a winery, they enjoy:

- Staff friendliness / hospitality (67%)
- Presentation / wine knowledge of host (41%)
- Attractiveness of facility / grounds (37%)



Activities

Their favorite activities to enjoy while on their winery trip are:



Trip characteristics

67% say that **visiting wineries was the primary reason for their trip.**

44% are on **overnight trips.**

Gorge visitors spend about **\$332 per day** per party during their trips.

Social media habits

When using social media to find wineries, they turn to...



86%
Facebook



53%
Instagram



12%
Pinterest



7%
Youtube

Paid lodging visitor

(n = 828)

These visitors paid for lodging in the region during their trips.

Age: **35 to 44 (32%)**
 Race/Ethnicity: **White (89%)**
 Gender: **Female (60%)**

When selecting a winery, they seek:

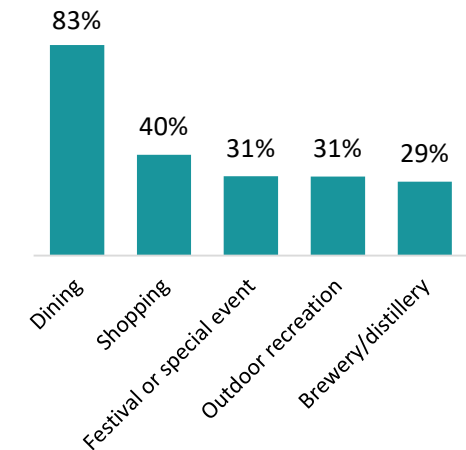
- Ambience, quality of tasting room (44%)
- Natural beauty of property (43%)
- Opportunity to discover new producers (37%)

Once at a winery, they enjoy:

- Staff friendliness / hospitality (74%)
- Presentation / wine knowledge of host (43%)
- Attractiveness of facility / grounds (35%)

Activities

Their favorite activities to enjoy while on their winery trip are:



Accommodations



56%
Hotel



17%
Airbnb

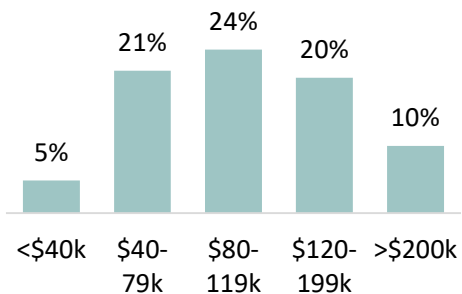


13%
Bed & Breakfast



7%
Campground/RV Park

Income



Bottles purchased

7.79
(average)

58%
visited
1-3 wineries
while on their trip

Trip characteristics

52% say that **visiting wineries was the primary reason for their trip.**

They spend about **\$196 per day** per party during their trips.

Social media habits

When using social media to find wineries, they turn to...



93%
Facebook



46%
Instagram



15%
Youtube



13%
Pinterest

Millennial

(n = 310)

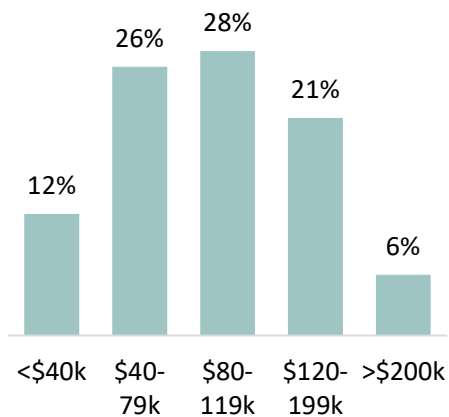
Age: **21 to 34** (8% of all responses)
 Race/Ethnicity: **White** (87%)
 Gender: **Female** (80%)

Bottles purchased

4.02
(average)

81%
visited
1-3 wineries
while on their trip

Income



Trip characteristics

74% say that **visiting wineries was the primary reason for their trip.**

28% are on **overnight trips.**

They spend about **\$245 per day per party** during their trips.

When selecting a winery, they seek:

- Natural beauty of property (60%)
- Ambience, quality of tasting room (45%)
- Affordability (35%)

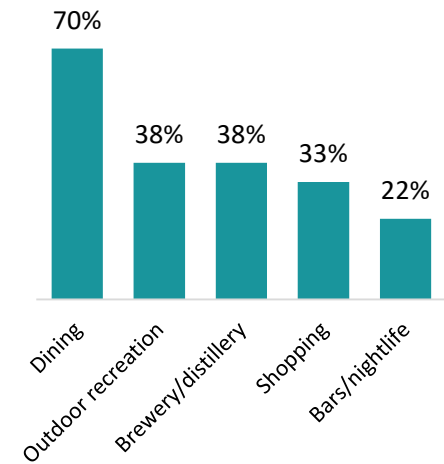
Once at a winery, they enjoy:

- Staff friendliness / hospitality (60%)
- Attractiveness of facility / grounds (43%)
- Ambience / social atmosphere (43%)



Activities

Their favorite activities to enjoy while on their winery trip are:



Social media habits

When using social media to find wineries, they turn to...



67%
Facebook



72%
Instagram



10%
Youtube



10%
Pinterest

Outdoor enthusiast (n = 267)

These visitors indicated that they participated in outdoor activities while on their winery trip.

Age: **55 or above** (60%)
 Race/Ethnicity: **White** (88%)
 Gender: **Female** (63%)

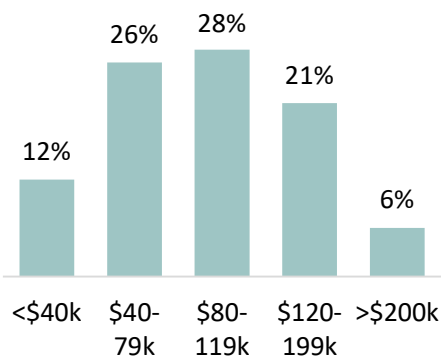
Bottles purchased

4.85
(average)

81%

visited
1-3 wineries
while on their trip

Income



Trip characteristics

76% say that **visiting wineries** was the **primary reason** for their trip.

27% are on **overnight trips**.

Outdoor enthusiasts spend about **\$231 per day** per party during their trips.

When selecting a winery, they seek:

- Natural beauty of property(48%)
- Ambience, quality of tasting room(42%)
- Wines the visitor knows and likes(29%)

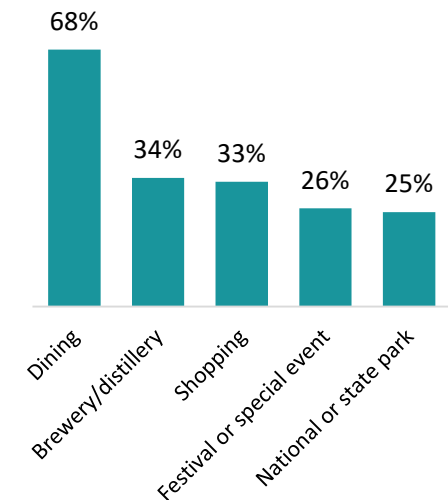
Once at a winery, they enjoy:

- Staff friendliness (65%)
- Host’s wine knowledge (36%)
- Facility attractiveness (36%)



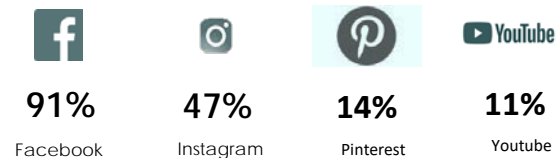
Activities

Their favorite activities to enjoy while on their winery trip are:



Social media habits

When using social media to find wineries, they turn to...



Outdoor pursuits

- Hiking (83%)
- Canoeing or kayaking (21%)
- Swimming (17%)
- Fishing (17%)
- Golfing (14%)

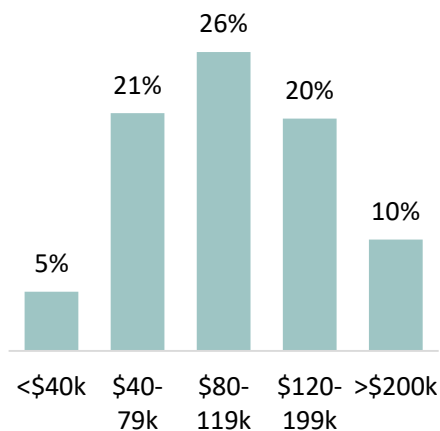
(n = 2,638)

Day tripper

Day trippers travel in for the day to visit wineries and enjoy the region, but don't stay overnight in the region.

Age: **65 or above** (33%)
 Race/Ethnicity: **White** (90%)
 Gender: **Female** (65%)

Income



When selecting a winery, they seek:

- Natural beauty of property (52%)
- Ambience, quality of tasting room (49%)
- Wines the visitor knows and likes (33%)

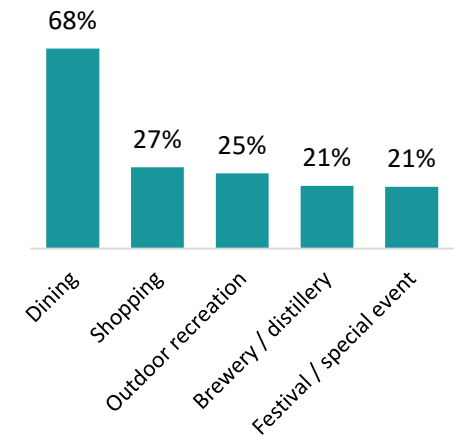
Once at a winery, they enjoy:

- Staff friendliness / hospitality (69%)
- Attractiveness of facility / grounds (40.4%)
- Ambience / social atmosphere (40.1%)



Activities

Their favorite activities to enjoy while on their winery trip are:



Bottles purchased

4.32
(average)

87%
visited
1-3 wineries
while on their trip

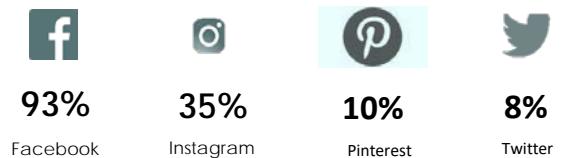
Trip characteristics

83% say that **visiting wineries was the primary reason for their trip.**

Day trippers spend about **\$208 per day** per party during their trips.

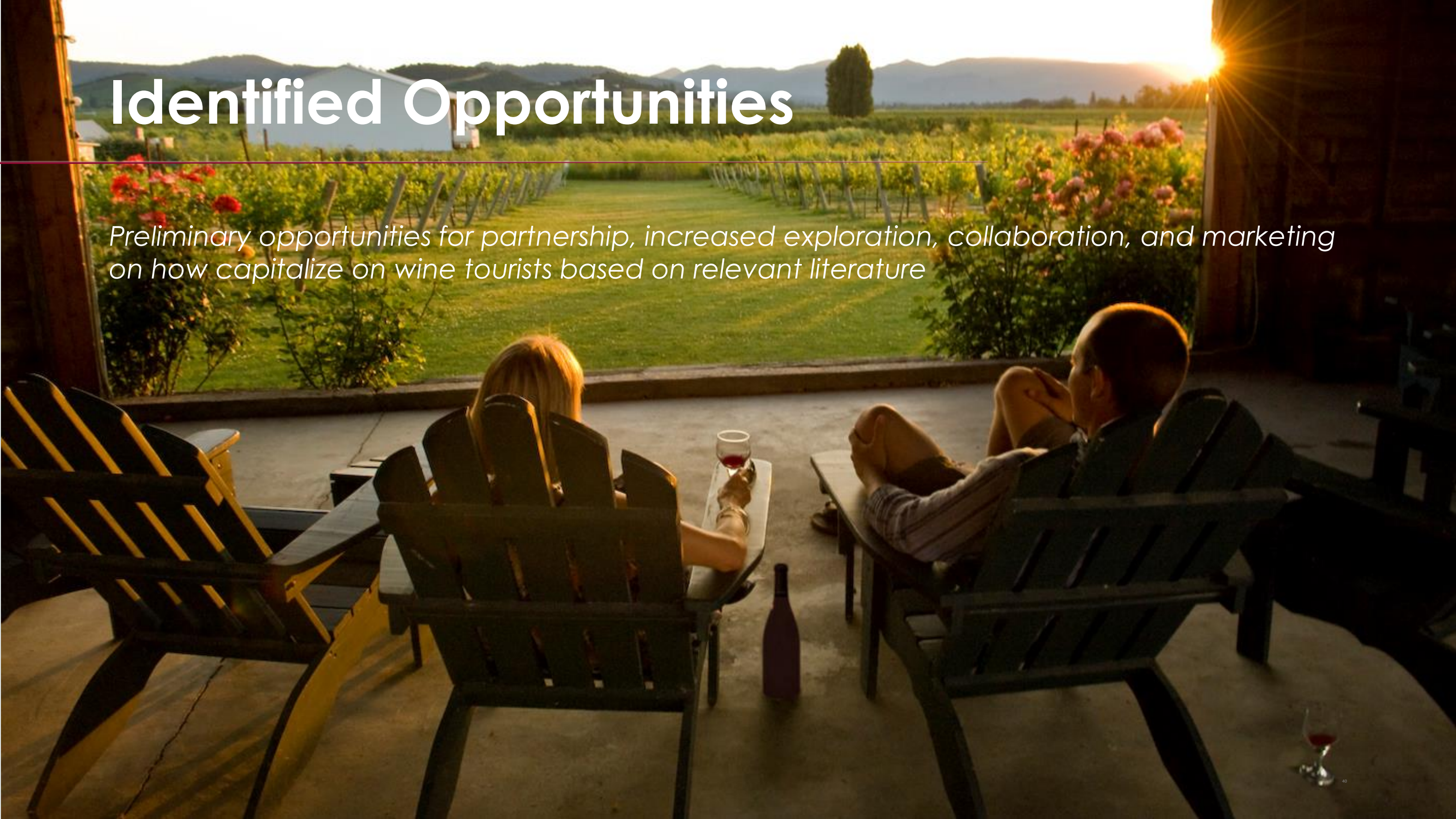
Social media habits

When using social media to find wineries, they turn to...



Identified Opportunities

Preliminary opportunities for partnership, increased exploration, collaboration, and marketing on how capitalize on wine tourists based on relevant literature



Agritourism



- **Agritourism:** Activity that invites visitors to experience a farm (or vineyard)
 - Wine and grape education
 - Winery and vineyard tours
 - Farm stays
 - Entertainment: dinners, live music, festivals, weddings
 - On-farm sales
- Exclusive Farm Use zoning
- Well-aligned with Oregon's brand
- Opportunity for wineries to enhance tourists' experience

Sustainable practices



- Certifications for sustainability and organic growing practices
- Popular among Oregon's wine producers, sustainability aligns with Oregon's brand
- Increasingly popular among consumers, especially millennials

Winery experience



- Winescape
 - Setting
 - Atmospherics
 - Wine Products
 - Complementary Product
 - Signage
 - Layout
 - Service staff
- Positive experiences > positive memories
> brand loyalty

Inclusion



- Beyond the historically targeted market
- Exclusion in marketing actively discourages a broader customer base
- Lose millennials when marketing is not diverse and inclusive
- “Savvy Shoppers” and “Overwhelmed” consumers: **28%** of purchases

Millennials



- 42% of wine sales, larger market share than Gen X
- Seek authenticity and novelty, don't value formality or expense
- **Key values**
 - Authenticity
 - Experiences
 - Influencers
 - Sustainability

Extreme weather



- **Extreme weather:** drought, flood, ice storm, wildfire
- Increasingly common
- Impacts tourism and wine production
- Planning for extreme weather is increasingly important

Future Opportunities



Suggestions & comments

When asked, “Do you have any other suggestions or comments about your experience?”

Top five categories of responses:

Alternative Activities



Winery Staff



Cost & Pricing

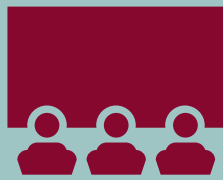


Food Options



Geographic Accessibility





What other activities were respondents interested in pairing with wine?

- Pairing wine experience with additional activities (i.e. outdoor recreation, events/festivals, live music)
- Locals and tourists are both interested in receiving marketing for special events or promotions
- Call for high quality lodging and restaurants to round out the experience



Staff

Staff play a key role in creating an enjoyable experience

- Visitors want staff who are friendly and knowledgeable
- Visitors want to have access to the owner/wine maker
- If visitors have a negative experience with the staff, their whole winery visit can be perceived less positively



Cost

Winery visitors can be very cost-conscious

- Visitors expressed dissatisfaction with increasing costs of tasting fees & wine
- Visitors wanted tasting fees waived for wine club members or if bottle(s) are purchased
- Some concern that increasing prices will change the ambience of the area



Visitors see a strong connection between wineries and food

- Visitors appreciate some sort of food offering, and even expect it
- Visitors are interested in pairings, local foods, and not drinking on an empty stomach
- Food options entice visitors to stay longer, visit more wineries





Even when wineries are rural, visitors want them to be accessible

- Visitors enjoy wineries that are easily car-accessible – close to urban areas
- For more rural wineries, high quality signage is very important
- Some visitors requested more non-driving modes of travel (i.e. tours, Uber/Lyft, shuttle services)
- Visitors want accurate, up-to-date maps including hours of operation

DISCUSSION

- How do you anticipate incorporating these results into your work?
- Do these recommendations align with what you see wineries in your region doing?
- What opportunities are there for cross-industry collaboration between wine and tourism?



Thank you!

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