OREGON WINERY VISITOR PROFILE

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OREGON WINE BOARD

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Project Advisory Team

Barbara Steele, Bob Hackett, Cal Schmidt, Christian Miller, Deborah Steinthal, Lizzie Keenan, Hilda Jones, Holly Macfee, Jess Willey, Laurel Briggs, Liz Wan, Natalie Price, Steve Eadie, Terry Brandborg

Project Collaborators

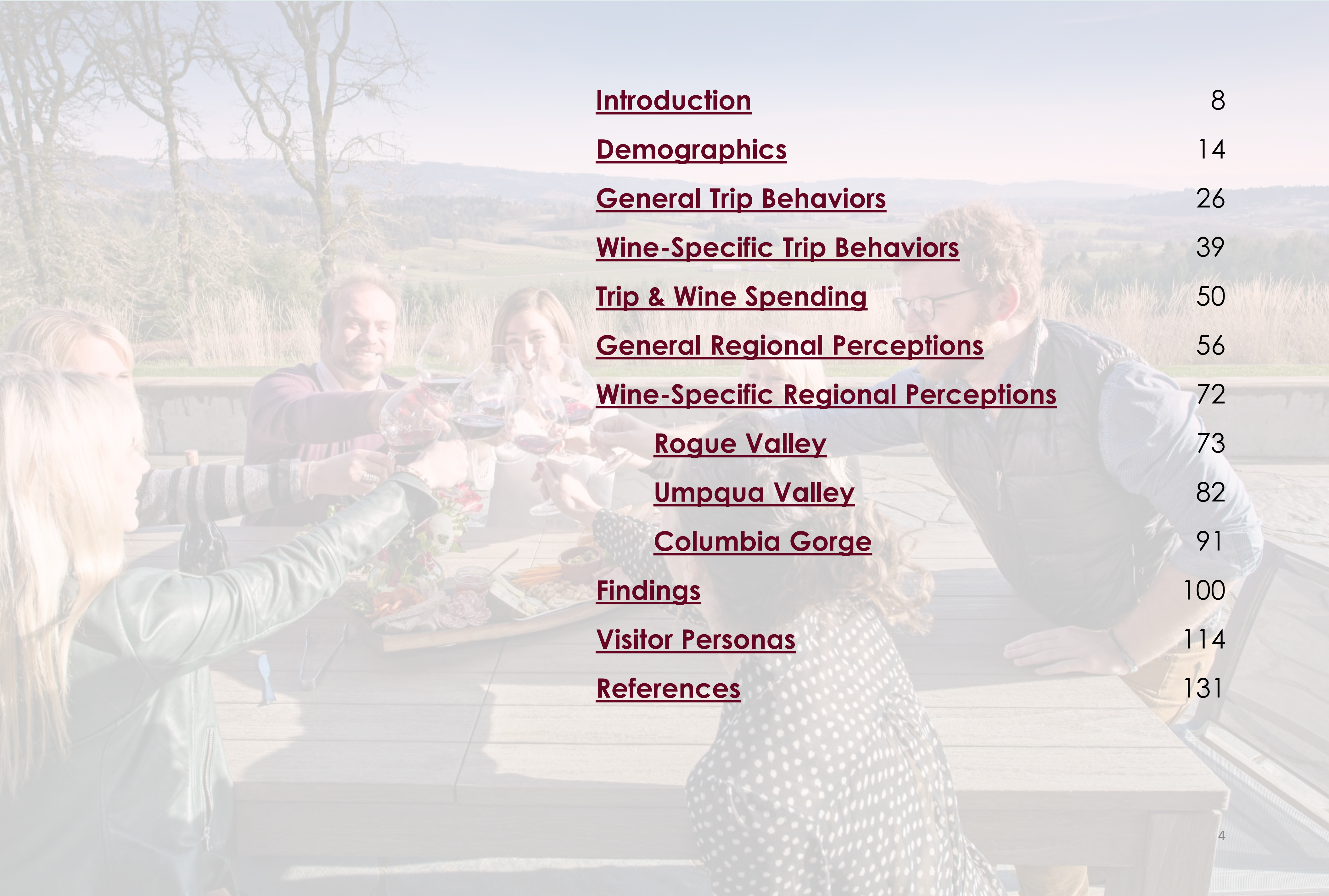
Ladan Ghahramani (Travel Oregon), Morgen McLaughlin (Willamette Valley Wineries Association), Erin Francis-Cummings and Kimberly Vince Cruz (Destination Analysts)

Survey Distribution Partners

Rogue Valley					
Wineries					
2Hawk Vineyard and Winery	Del Rio Vineyards	Kriselle	Platt Anderson Cellars	Serra Vineyards	Weisinger Family Winery
Belle Fiore	Edenvale Winery	Moulton Family Wines	Quady North Winery	South Stage Cellars	Wooldridge Creek
Cowhorn	Eliana Wine	Paschal Winery	RoxyAnn Winery	Troon Vineyard	
Cricket Hill	Irvine & Roberts Vineyards	Pebblestone Cellars	Schmidt Family Vineyards	Upper Five Vineyard	
Dancin Vineyards	Jaxon Vineyards	Plaisance Ranch	Schultz Wines - Glory Oaks	Valley View Winery	
Partners					
Chamber of Medford/ Jackson County		Grants Pass Chamber	Oregon Shakespeare Festival	Rogue Valley Vintners	Travel Medford
Hellsgate Jet Board Excursions		Oregon Wine Experience	Rogue Creamery	Travel Ashland	Oregon Wine Board

Umpqua Valley					
Wineries					
Abacela	Brandborg Vineyard & Winery	Foon Estate Vineyard	Freed Estate Winery	Trella Vineyards	Triple Oak Vineyard
Bradley Vineyards	Delfino Winery				
Partners					
Oregon Wine Board	Umpqua Valley Winegrowers				

Columbia Gorge					
Wineries					
Cathedral Ridge Winery	Cerulean Winery	Hood Crest Winery	Mount Hood Winery	Phelps Creek Vineyards	Stave and Stone
Partners					
Columbia Gorge Wineries Association		MountnBarreL	Oregon Wine Board		



Introduction

"Oregon is the most dynamic wine region in the United States right now… Looking to the future, Oregon is only beginning to tap into its potential."

-Tim Fish, Wine Spectator, Mar. 2019

The wine industry in Oregon is thriving. Since 2000, the number of vineyards in Oregon has more than doubled, and the number of wineries has increased nearly six-fold (Oregon Vineyard & Winery Report, 2000-2018). As the industry has grown, so too has recognition and accolades for Oregon's wine. Although Oregon wines still account for only about 1% of US wine production, they made up nearly 20% of *Wine Spectator's* 90+ scores between 2015 and 2018 (Wines & Vines, 2017).

The wine industry's growth translates to a positive impact on Oregon's economy, helping to uplift Oregon communities, particularly those in rural areas where much of Oregon's grape growing and wine production occurs. Full Glass Research estimated that in 2016, Oregon's wine industry contributed $5.6 billion to the state's economy, supporting around 30,000 jobs that paid around $1 billion in wages (2018).

Currently, the Oregon Wine Board estimates that about one-quarter of Oregon's wine sales are direct to consumer, but for many small- to mid-sized wineries, direct to consumer channels often account for a much higher proportion of sales (Oregon Vineyard & Winery Report, 2018). Tasting room purchases dominate as the venue for direct to consumer sales (Oregon Vineyard & Winery Report, 2018).

Direct to Consumer Sale Channels

Given the importance of direct to consumer sales (particularly in the tasting room), coupled with the estimated $787 million that wine-related tourism contributes to the state's economy (Full Glass Research, 2018), it has become increasingly important to understand the characteristics and motivations of Oregon's winery visitors.

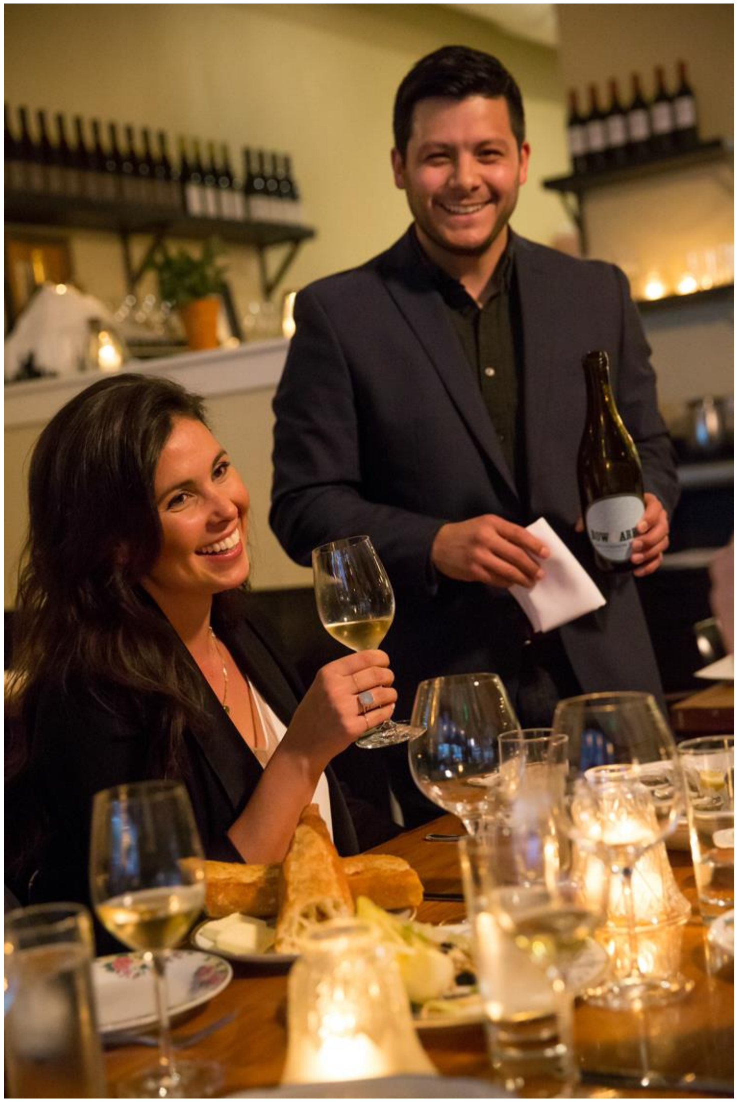
OREGON WINERY VISITOR PROFILE STUDY

About the Study

From the summer of 2018 through the spring of 2019, the University of Oregon's Institute for Policy Research & Engagement (IPRE) worked with the Oregon Wine Board to conduct a survey of visitors to three of Oregon's major wine regions: the Rogue Valley, the Umpqua Valley, and the Columbia Gorge. Parallel to these efforts, the Willamette Valley Wineries Association surveyed winery visitors in the Willamette Valley. In combination, these survey efforts form the basis for Oregon's first comprehensive Winery Visitor Profile.

The extensive visitor profile survey administered by IPRE asked winery visitors to provide details of their trip and travel habits, including information about travel patterns, trip activities and spending, and satisfaction with their experience. The survey also investigated visitors' perceptions of each wine region in comparison to other wine regions and considered visitors' preferences for various tasting room attributes. This report provides a summary of key findings from the survey research. Since IPRE focused on the Rogue Valley, Umpqua Valley, and Columbia Gorge AVAs, we primarily present profile information for these areas, providing comparison to the Willamette Valley and the general (not winery-specific) Oregon visitor as relevant. For a detailed profile of Willamette Valley winery visitors, please refer to the Willamette Valley Wineries Association's "Profile of Wine Tourists to the Willamette Valley."

This report focuses first on describing characteristics of winery visitors such as their demographics, travel behaviors, spending habits, and perceptions of each wine region. We then present some broader findings from our research, including emerging trends in winery tourism and specific preferences and behaviors that wine industry and travel professionals should consider as they work to strengthen Oregon's wine sector. Finally, we offer a series of visitor personas to describe the preferences and behaviors of 19 different segments of our survey respondents.



METHODS

Survey Development

IPRE worked extensively with the Oregon Wine Board and regional partners representing the Rogue Valley, Umpqua Valley, and Columbia Gorge to develop a comprehensive visitor profile survey. Since the Willamette Valley Wineries Association implemented their visitor profile survey prior to the IPRE survey, IPRE included many of the same questions to ensure comparability between the Willamette Valley data and the Rogue Valley, Umpqua Valley, and Columbia Gorge data. The IPRE survey, however, contained many additional questions not included in the Willamette Valley survey. The final survey included five main sections:

- **Filtering Questions** – ascertained whether respondents had visited a winery in the region recently and whether they lived within or outside of the region
- **About Your Trip** – gathered in-depth information about travel and spending habits during respondents' most recent visit to a winery or wineries (answered only by respondents who had visited a winery within the past year)
- **Trip Motivation & Satisfaction** – investigated respondents' reasons for visiting the region and wineries in the region and their satisfaction with various aspect of the visit (answered by all respondents – those who had visited a winery in the past year, those who had done so more than one year ago, and those who had visited the region, but not a winery in the region)
- **Comparisons to Other Wine Regions** – assessed respondents' perceptions about the quality and attributes of the wine region being surveyed and several other comparison regions in Oregon, Washington, and/or California (answered by all respondents)
- **Demographic Questions** – gathered basic information about respondents' demographics and travel party make-up

Survey Distribution

IPRE worked with wineries, winery associations, and travel partners in each of the three regions to distribute the survey at three different points in time:

- August – October 2018
- November 2018
- February – March 2019

During each distribution push, IPRE relied on three different distribution methods. Each respondent had the opportunity to enter a special drawing for an overnight getaway and the first 500 respondents could chose to receive a free tasting voucher for one of the participating wineries in the region.

Distribution Methods (All three methods used during each distribution push.)
Online survey distributed via email to winery and travel partner customer lists
Paper survey station set up at 1-5 tasting rooms per region for customers to complete during a visit
In-person intercept surveys administered by IPRE staff at 2-4 tasting rooms per region

METHODS

Survey Distribution – Regional Specifics

IPRE worked with wineries, winery associations, and travel partners in the Rogue Valley, Umpqua Valley, and Columbia Gorge to distribute the survey to as many winery visitors as possible. When the survey closed in March 2019, a total of 5,420 respondents had provided feedback.

Rogue Valley	
Participating Wineries	27
Participating Partners	10
Total Responses	3,598

Umpqua Valley	
Participating Wineries	8
Participating Partners	2
Total Responses	895

Columbia River Gorge	
Participating Wineries	7
Participating Partners	3
Total Responses	927

During survey distribution, the newly formed Rogue Valley Vintners played an active role in promoting the survey to Rogue Valley wineries. This explains the difference in participation and responses between the Rogue Valley and other regions. While we primarily present the data separated by region in this report, it is important to acknowledge the dominance of the Rogue Valley in any aggregate reporting. In these few instances, the preferences, behaviors, and concerns reported are skewed towards Rogue Valley respondents.

LIMITATIONS

Winery Visitor Sample versus Population

The full population of winery visitors in Oregon is unknown and it is therefore impossible to survey a random sample of visitors. This study took the approach of trying to reach as many winery visitors as possible during the survey period. Survey stations and intercept surveys theoretically reached a "random" group of winery visitors who happened to be visiting when surveys were available in the tasting room. The majority of survey responses, however, came from the online survey distribution. This sample consisted of those interested enough to sign up for winery customer email lists, the Oregon Wine Board's email list, and various lists maintained by regional travel industry groups and their partners (such as the Oregon Shakespeare Festival).

This means that the survey likely excludes the behaviors and preferences of anyone less-enthusiastic, more private, or otherwise less likely to sign up for email lists. Given the size of the sample however, we are confident that the survey still provides valuable insights into the characteristics of winery visitors in the Rogue Valley, Umpqua Valley, and Columbia Gorge.

LIMITATIONS

Willamette Valley Comparisons – Methodological Differences

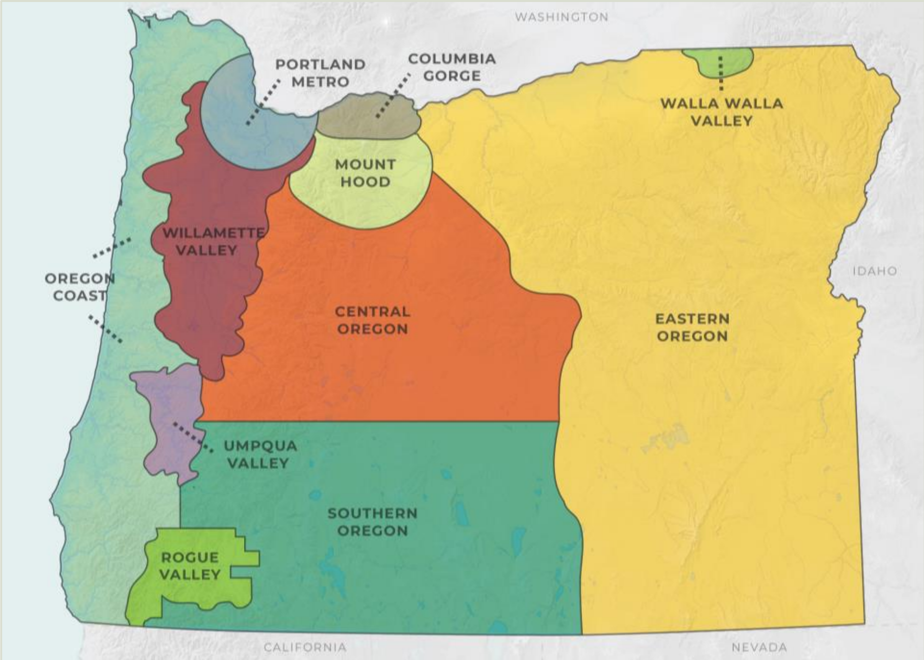
While the IPRE survey included several of the questions used in the Willamette Valley survey (which was conducted both as an in-person intercept and online survey), the different distribution methods and slightly different survey objectives meant many questions are not directly comparable.

In as many instances as possible, we present data from our study regions and the Willamette Valley to provide useful comparisons. In some of these cases, however, the two surveys' response options were slightly different and therefore Willamette Valley data has a different presentation. We also call out instances where we believe the Willamette Valley survey's different format lead to responses that seem misaligned with our survey responses. For several sections of this report, the Willamette Valley's more limited survey did not provide any data for comparison – all sections that do not include Willamette Valley comparisons fall into this category.

DEFINITONS

Oregon's Wine Regions

The map at right outlines a combination of Oregon's wine regions and tourism areas. On the survey, respondents used the map to indicate whether they primarily lived within or outside of the wine region under consideration in the survey. Later in the survey, respondents again used this map to indicate which other regions they had visited during their trip.



DEFINITIONS

Locals, Non-Locals, and Overnight Visitors

Travel Oregon defines a “visitor” as someone who has either spent at least one night away from home as part of their trip or traveled more than 50 miles to reach their destination. In this report, we use the terms “local” and “non-local” to distinguish between distance traveled to arrive at the trip destination:

- **Local** – Traveled 50 miles or less
- **Non-Local** – Traveled more than 50 miles

This distinction means that a respondent may be a “resident” of the region (they primarily live within the region), and also a “non-local” because they traveled more than 50 miles to reach their destination.

“Overnight” visitors are those who spent at least one night away from their primary residence and may also be local or non-local.

High-Frequency, High-End Wine Consumers

In the Wine-Specific Regional Perceptions section of this report, we sometimes provide a breakout between “high-frequency, high-end” (HFHE) wine consumers and non-HFHE wine consumers. We define these terms as follows:

- **HFHE** – Those who said they drink wine at least a few times a week (high-frequency) and purchase wine costing $20 or more at least monthly (high-end)
- **Non-HFHE** – Those who said they drink wine about once per week or less and purchase wine costing $20 or more only several times per year or less

The General Oregon Tourist

We sometimes provide comparisons to the “general” Oregon tourist. The general Oregon tourist refers to visitors (overnight visitors or visitors traveling more than 50 miles to their destination) who traveled in Oregon for any reason, not just visiting a winery. Information on the general Oregon tourists comes from two sources:

- Dean Runyan Associates’ 2018 report “Oregon Travel Impacts: Statewide Estimates, 1992-2017p”
- Longwoods International’s 2018 report “Oregon 2017 Visitor Research” (provided by Travel Oregon)

DEMOGRAPHICS

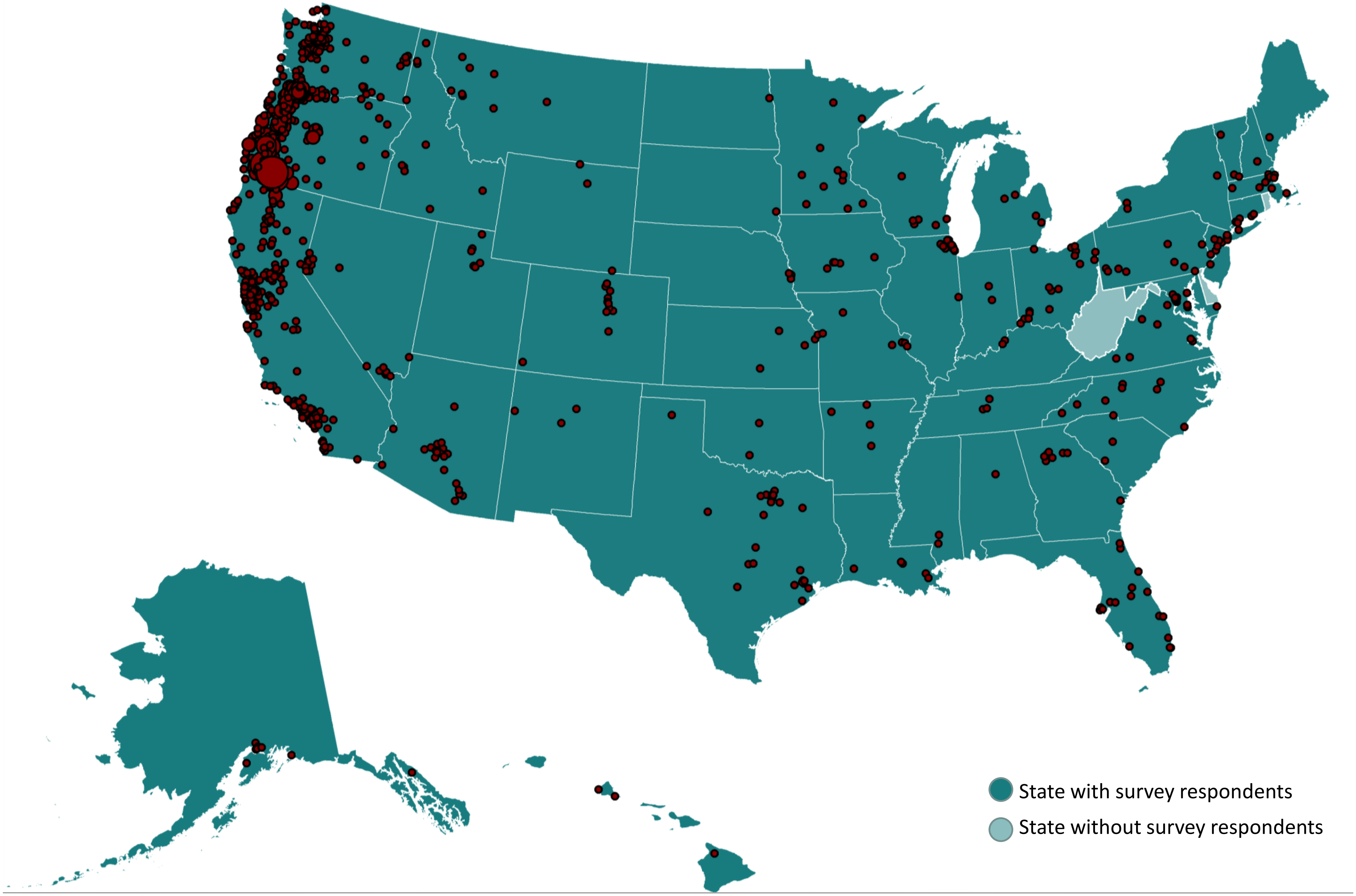
This section presents some basic demographic characteristics of survey respondents. It covers the following characteristics:

- **Respondent Origins** – Where do respondents to each survey primarily live?
- **Respondent Age –** What is the age distribution of survey respondents?
- **Household Income –** What is the household income distribution of survey respondents?
- **Respondent Gender –** What is the gender distribution of survey respondents?
- **Respondent Race/Ethnicity –** What is the race/ethnicity distribution of survey respondents?
- **Frequency of Wine Consumption –** How frequently do respondents generally consume wine?
- **Party Composition –** What was the gender and age composition of respondents' travel parties?

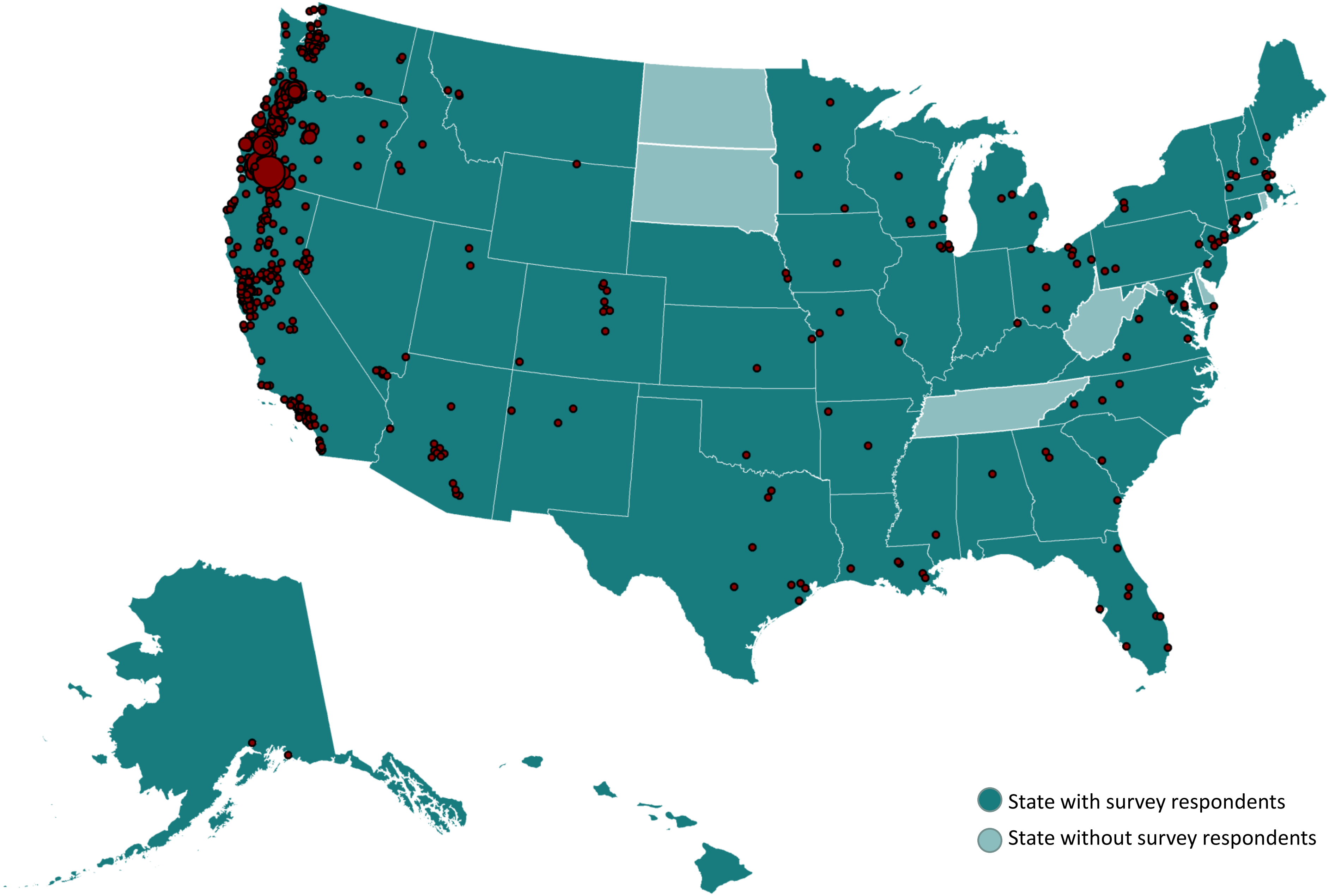
We can draw several conclusions from survey respondents' demographic information:

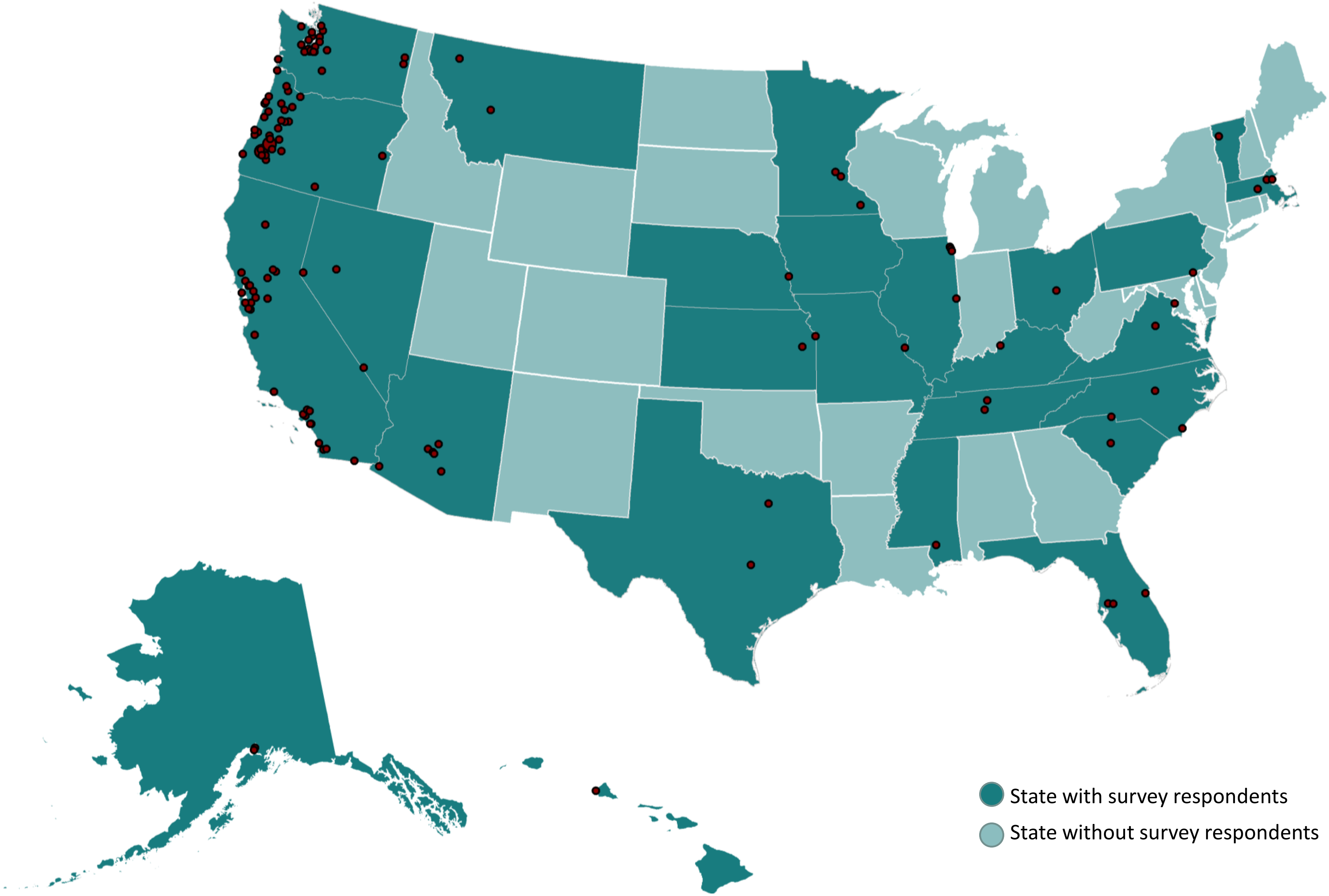
- The majority of survey respondents live on the West Coast, with the highest percentages of respondent origins in Oregon and Washington.
- Respondents skew older and female, with just under two-thirds reporting 55 years or older and female.
- Respondents skew towards higher income brackets, with 57% reporting annual household incomes of $80,000 or more.
- Respondents were predominantly white (89% of all respondents).
- The majority of respondents drink wine frequently – 80% reported drinking wine a few times per week or daily.
- The majority of respondents are not frequent high-end wine consumers – only about one-fifth purchase wine costing $20 or more monthly or more often.

RESPONDENT ORIGINS - AGGREGATE

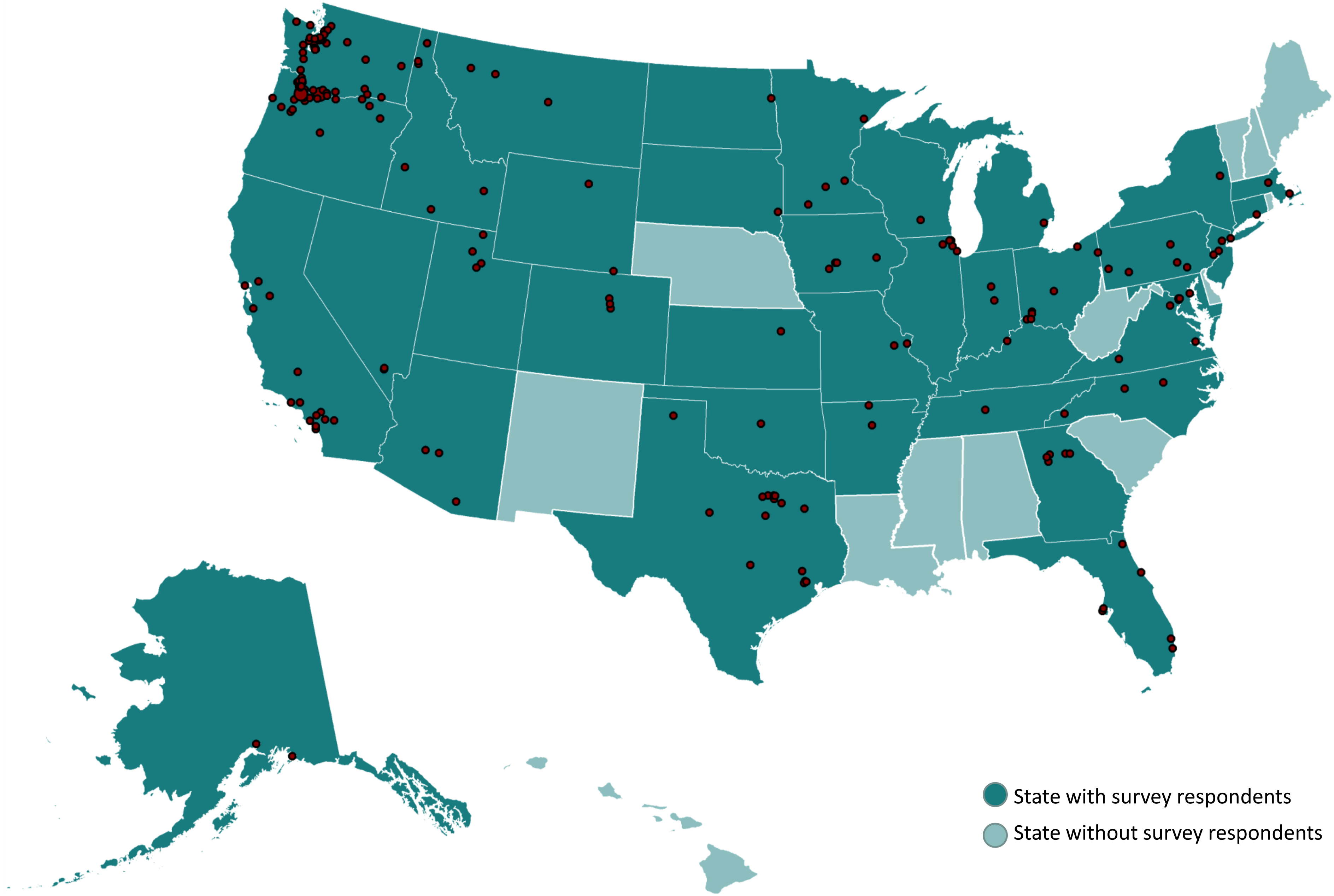


RESPONDENT ORIGINS – ROGUE VALLEY




State with survey respondents
State without survey respondents

RESPONDENT ORIGINS – COLUMBIA GORGE



Where do you currently live?

As the respondent origin maps illustrate, survey respondents reported living in every state except West Virginia. Survey respondents were most heavily concentrated on the West Coast, with just over three-quarters living in Oregon, 7% living in Washington, and 8% living in California.

Each region had the biggest concentration of respondents living within or near the region for which they responded—Rogue Valley respondents were heavily concentrated in the Rogue Valley, Umpqua Valley respondents were heavily concentrated in the Umpqua and Willamette Valleys, and Columbia Gorge respondents were heavily concentrated in the Portland area, Seattle area, and Columbia Gorge.

Umpqua Valley respondents did not come from as many states as Rogue Valley and Columbia Gorge respondents. Columbia Gorge respondents did not come from quite as many states as Rogue Valley respondents.

Although the survey asked if respondents lived an another country, only 35 respondents reported living outside of the US.

For Comparison

More Willamette Valley respondents also reported living in Oregon than any other state, though to a lesser degree than the three study regions' respondents (46% of the Willamette Valley's domestic respondents hailed from Oregon). Just as in this study's three regions, very few Willamette Valley respondents lived outside of the US – only 1.5%.

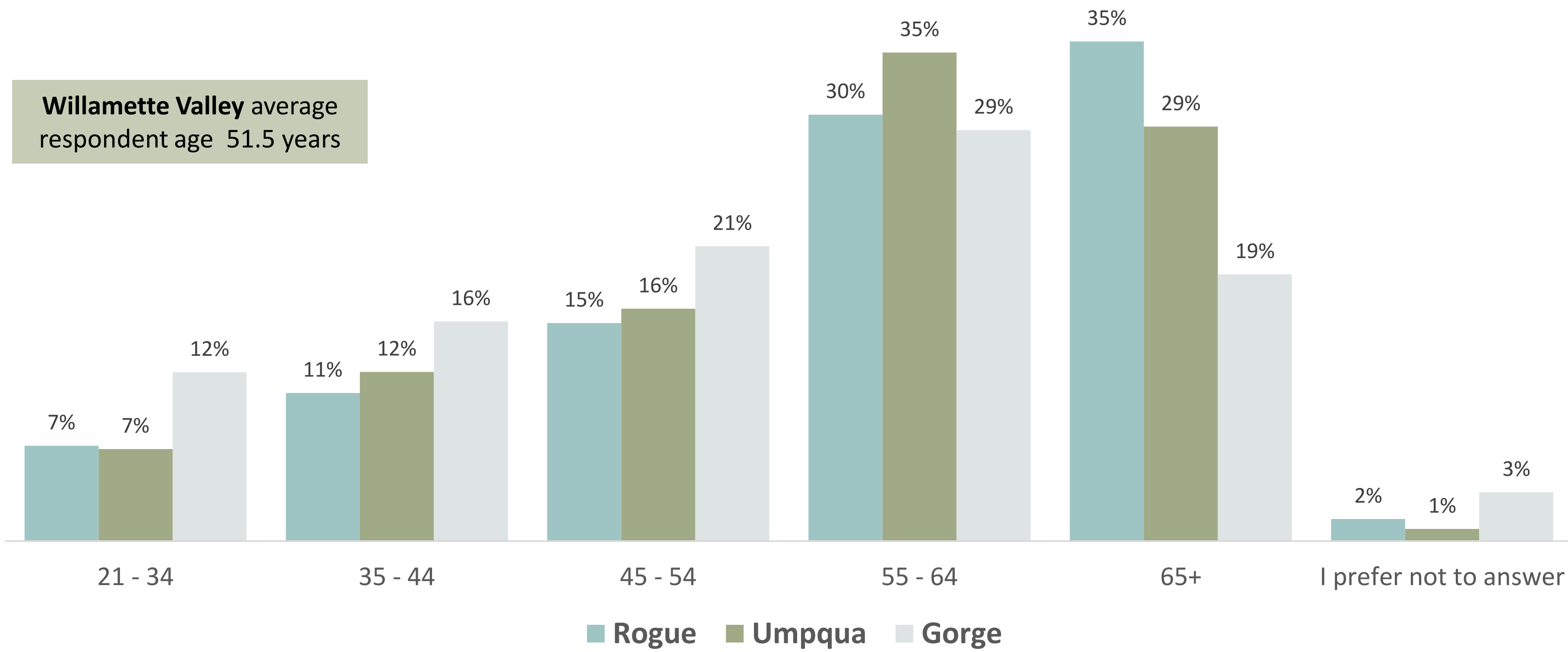
Which best describes your age?

Across all three regions, respondents skewed older. The Columbia Gorge had the youngest respondent pool with 49% reporting that they are younger than 55. The Rogue Valley has the oldest respondent pool with 65% of respondents reporting age 55 and older.

For Comparison

With an average respondent age of 51.5 years, Willamette Valley respondents were also older.

Respondents to the winery visitor survey are skewed older than the general overnight visitor to Oregon. Longwoods International estimated that in 2017, only 39% of Oregon's overnight visitors were 55 and older.



Which best describes the combined annual income of all members of your household?

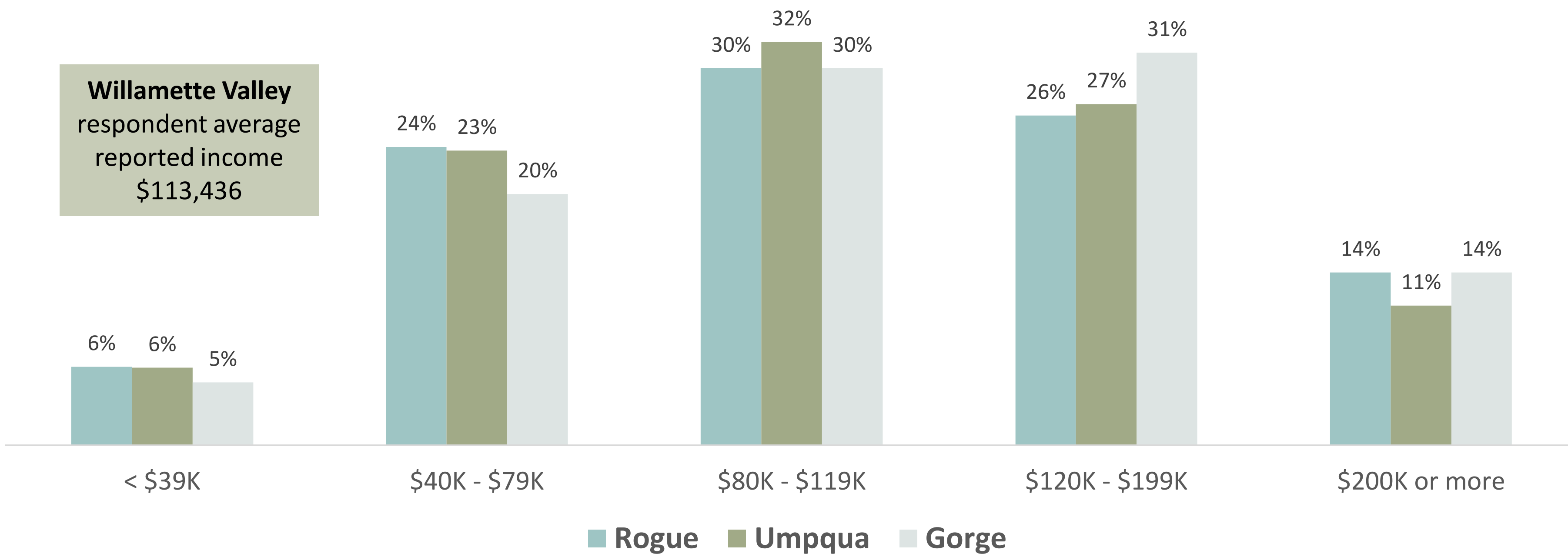
Across all three regions, the majority of respondents reported household incomes above $80,000, although the respondents' incomes follow a generally normal distribution.

There is little variation between reported household incomes across the three regions, although a slightly greater percentage of Columbia Gorge respondents indicated incomes over $120,000.

For Comparison

With an average respondent household income of over $113,000, the majority of Willamette Valley respondents, like the majority of this study regions' respondents, had higher household incomes than the average American.

Household incomes of winery survey respondents skewed much higher than the general overnight visitor to Oregon. Longwoods International estimated that in 2017, 37% of Oregon's overnight visitors had a household income of $75,000 or more, compared to the 70% of winery survey respondents who reported earning $80,000 or more.



What is your gender?

Over 60% of respondents across all three regions identified as female. This is unsurprising as more women tend to respond to surveys than men. The percentage of nonbinary respondents was less than 1% in all three regions.

For Comparison

Similar to the three study regions, more Willamette Valley respondents identified as female (52%) than male (47%).

Longwoods International estimated that in 2017, 53% of Oregon's overnight visitors identified as female.

	Rogue	Umpqua	Gorge
Female	63%	61%	68%
Male	36%	39%	29%

Which best describes your race or ethnic background? *Respondents could select multiple responses.*

All three regions share a similar race/ethnicity composition with 89% of respondents identifying as being white.

For Comparison

Willamette Valley respondents reported a similar race/ethnicity distribution as the three study regions.

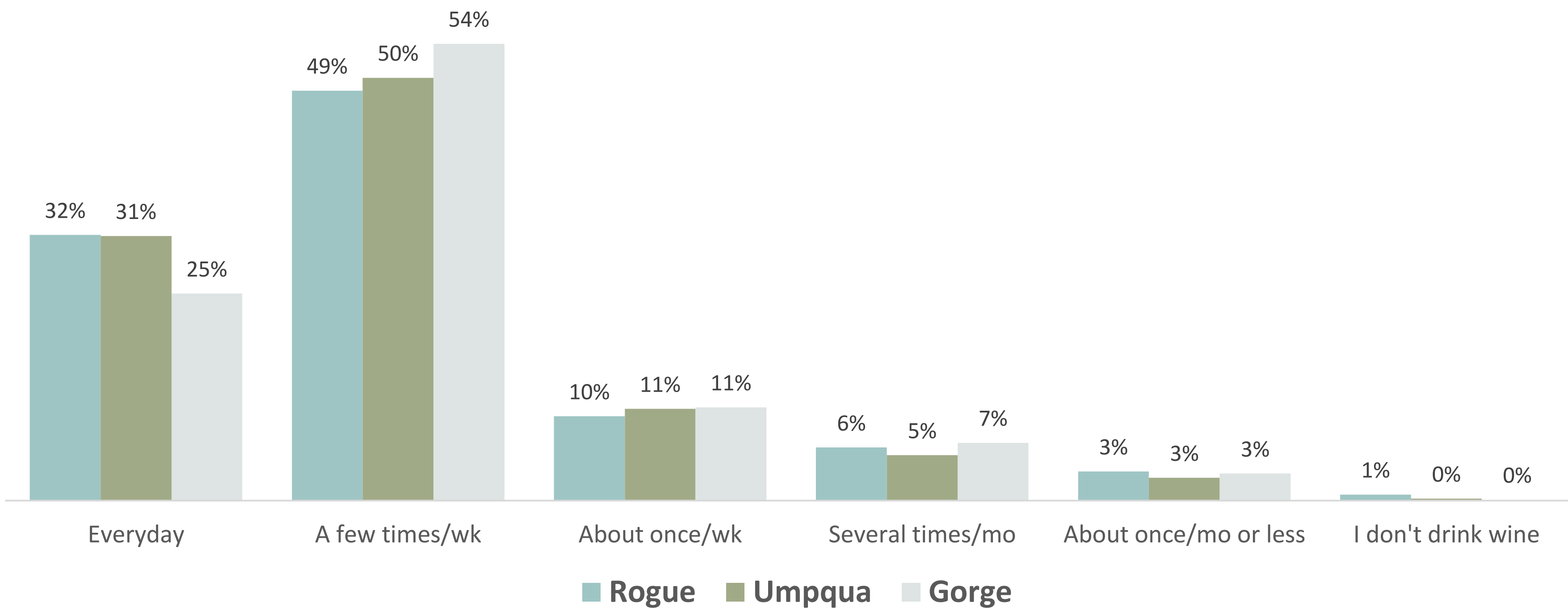
Winey survey respondents align with the general Oregon visitor. Longwoods International estimated that in 2017, 88% of Oregon's overnight visitors were white.

	Rogue	Umpqua	Gorge
White	89%	89%	89%
Hispanic/Latinx	3%	2%	3%
Asian/Pacific Islander	2%	1%	2%
American Indian/Alaska Native	1%	1%	1%
Black/African-American	0%	1%	2%
I prefer not to answer	7%	6%	6%

On average, how often do you drink wine?

Across all three regions, the majority of respondents drink wine at least a few times per week. It is unsurprising that respondents to a survey about wine would be high-frequency consumers. This suggests that visitors to winery tasting rooms are more likely to drink wine frequently and therefore have a stronger relationship with the product and perhaps more knowledge of its nuances.

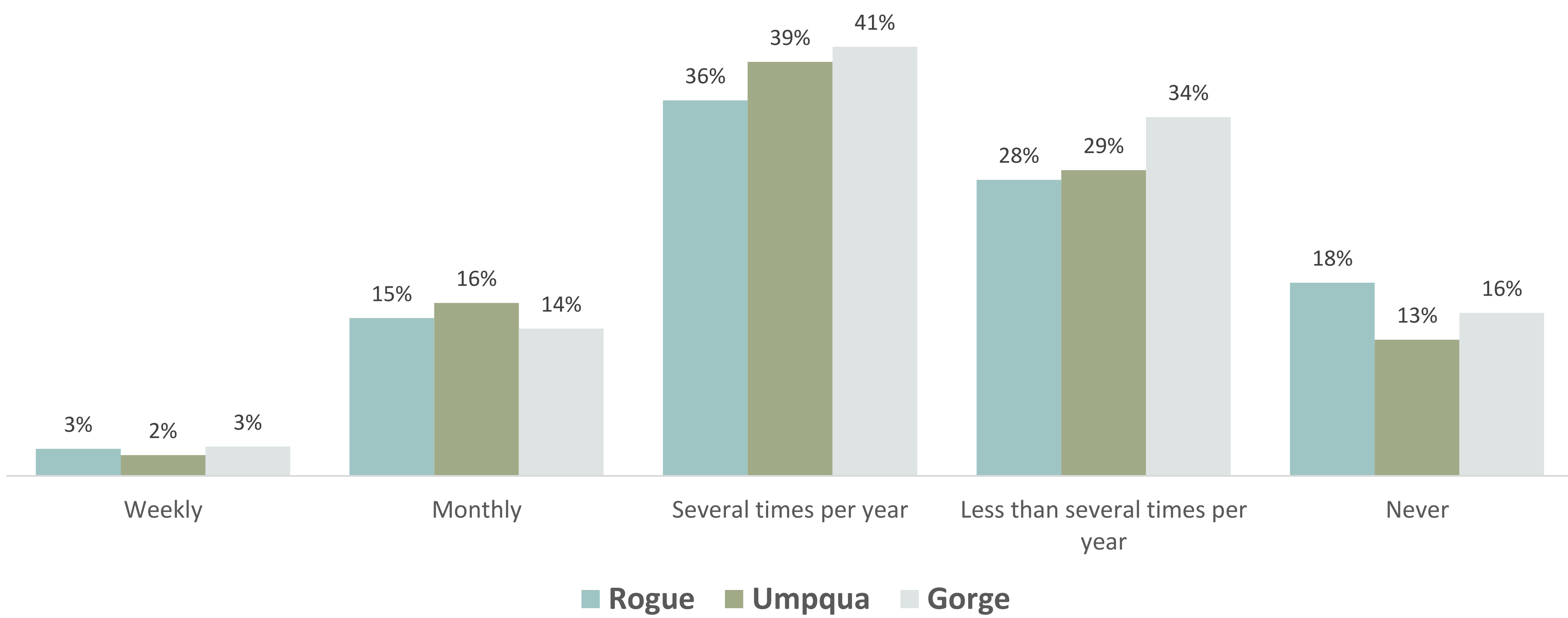
There is little variation between regions, although a slightly lower percentage of Columbia Gorge respondents reported drinking wine daily than in other regions.



On average, how often do you buy wine at a retail store or winery tasting room that costs $20 or more (per standard 750ml bottle)?

Across all three regions, more than half of respondents purchase wine costing $20 or more at least several times per year. Only about one-fifth purchase $20+ wine weekly or monthly, indicating that the majority of respondents are not frequent high-end wine consumers.

There is little variation between regions, although a slightly higher percentage of Columbia Gorge respondents reported purchasing $20+ wine less than several times per year or never than Rogue or Umpqua Valley respondents.



What was the composition of your travel party? Please indicate the number of people by age range and gender.

Across all three regions, the average party size is between 3 and 3.5.

Travel parties also tend to be more heavily female and older, similar to the gender and age distributions of survey respondents. Since more women answered the survey, it is possible that their travel parties tended to include more female friends resulting in the gender imbalance reflected here. It is also possible that more women than men tend to visit wineries, a distribution that is also reflected in the Willamette Valley data.

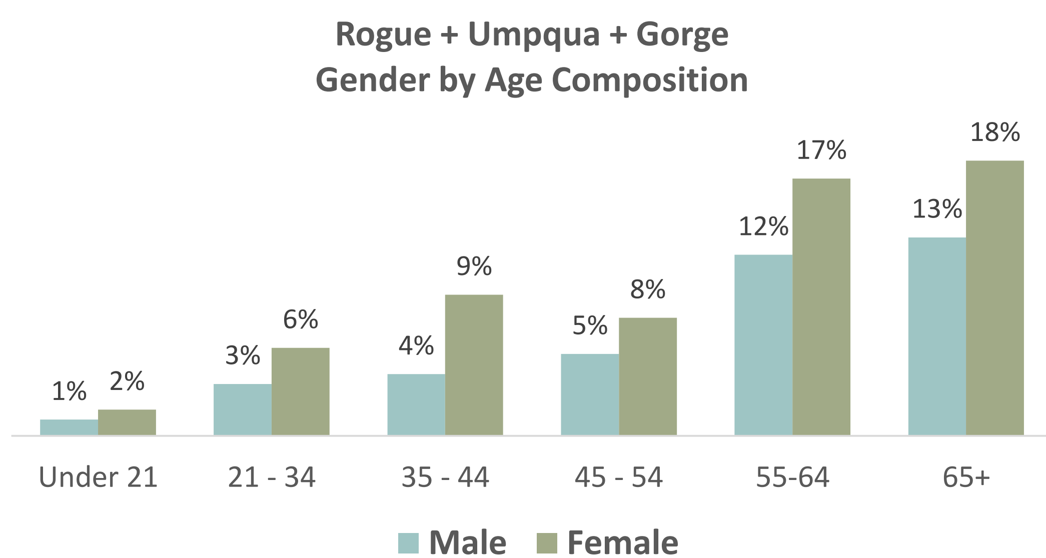
For Comparison

The reported average party size in the Willamette Valley is the same as the Rogue Valley and slightly higher than the Umpqua Valley and Columbia Gorge.

Similar to the three study regions, Willamette Valley respondents reported parties with higher percentages of females than males.

	Rogue	Umpqua	Gorge	Willamette
Average Party Size	3.5	3.0	3.3	3.5
Percent Male	40%	42%	40%	40%*
Percent Female	59%	57%	59%	49%*
Percent Non-Binary	1%	1%	1%	N/A
Total Number of Parties	2,624	621	643	6,024

* Percent reported are percent of party size that are adult male and female.



GENERAL TRIP BEHAVIORS

This section includes information about characteristics of respondents' trips that are not specific to wine-related activities. It covers the following topics:

- **Trip Type –** Why were respondents taking their trip: to visit family, to have fun, for a special event? How far did they travel?
- **Transportation –** How did respondents primarily get around on their trip?
- **Overnight Stays –** How many respondents spent the night as part of their trip, and for those who did, where and how long did they stay?
- **Other Destinations –** Where else did respondents go as part of their trip?
- **Other Activities –** What other activities (besides wine tasting) did respondents participate in?
- **Trip Impact –** Are respondents likely to recommend a trip to the region to others?

We can draw several conclusions about survey respondents' trip behavior:

- The largest proportion of survey respondents (a little less than half) described their trip as a "leisure day trip." Far fewer survey respondents were incorporating their winery visit(s) into overnight trips.
- The vast majority of respondents travel by car, mostly personal and some rented.
- For those respondents who did stay overnight (around 40%), the highest percentage spent the night in a hotel or motel, although many also stayed with friends or relatives or in a vacation rental.
- Respondents who visited other locations tended to go to geographically close areas.
- Almost three-quarters of respondents also went to restaurants as part of their trip, making dining the most popular additional trip activity.
- Respondents enjoyed their trips – they overwhelmingly reported they'd recommend the region to others.

What best describes your trip?

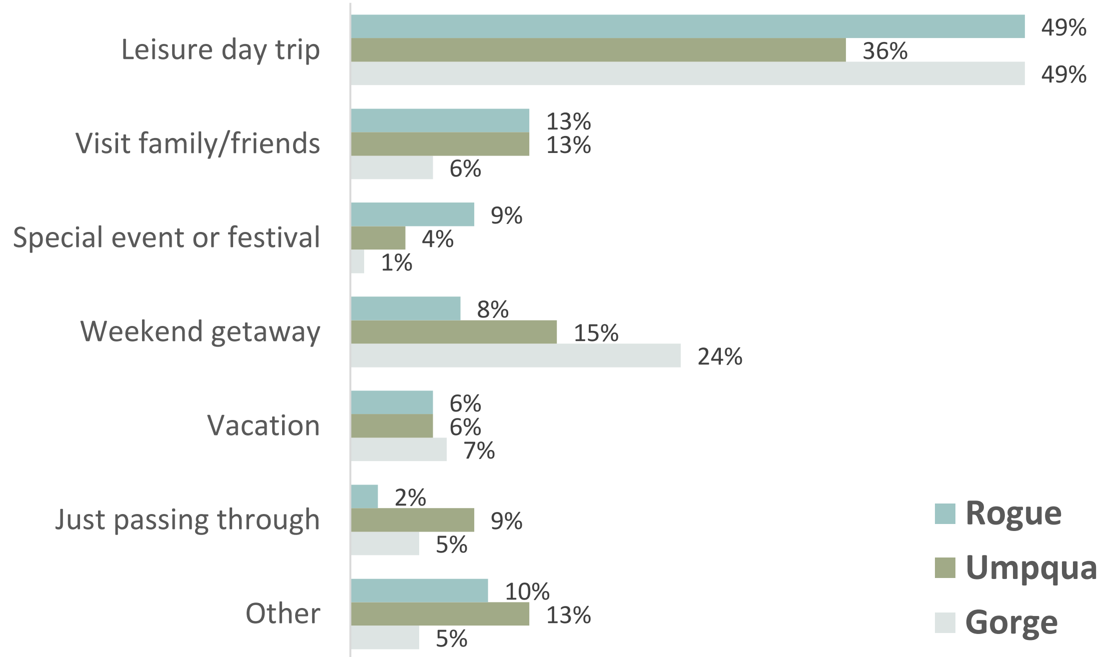
In all three regions, leisure day trips were respondents' most common reason for travel.

In the Columbia Gorge, however, weekend getaways were also a common trip type, more so than in the Rogue or Umpqua Valleys. Also notably, Umpqua Valley respondents participated in trips other than leisure day trips at a greater proportion than respondents from other regions.

For Comparison

Locals and non-locals displayed different trip habits in the Rogue and Umpqua Valleys, but less so in the Columbia Gorge. In both the Rogue and Umpqua Valleys, local respondents were much more likely to participate in a leisure day trip, while non-locals were far more likely to be visiting family and friends. In the Columbia Gorge, trip types varied less between locals and non-locals, although non-locals were more likely to be "just passing through."

These distinctions indicate that in the Rogue and Umpqua Valleys, non-locals have more varied reasons for travel, while in the Columbia Gorge, day-tripping dominates regardless of the distance traveled to make the trip.



	Rogue Local	Rogue Non-Local	Umpqua Local	Umpqua Non-Local	Gorge Local	Gorge Non-Local
Leisure day trip	63%	34%	58%	35%	65%	66%
Special event/festival	11%	6%	9%	2%	4%	1%
Visit family/friends	10%	29%	10%	20%	9%	7%
Wedding/private event	2%	3%	1%	2%	4%	2%
Just passing through	1%	7%	2%	19%	3%	8%
Other	13%	9%	19%	14%	14%	5%

Did you travel more than 50 miles from your home to visit a winery on this trip?

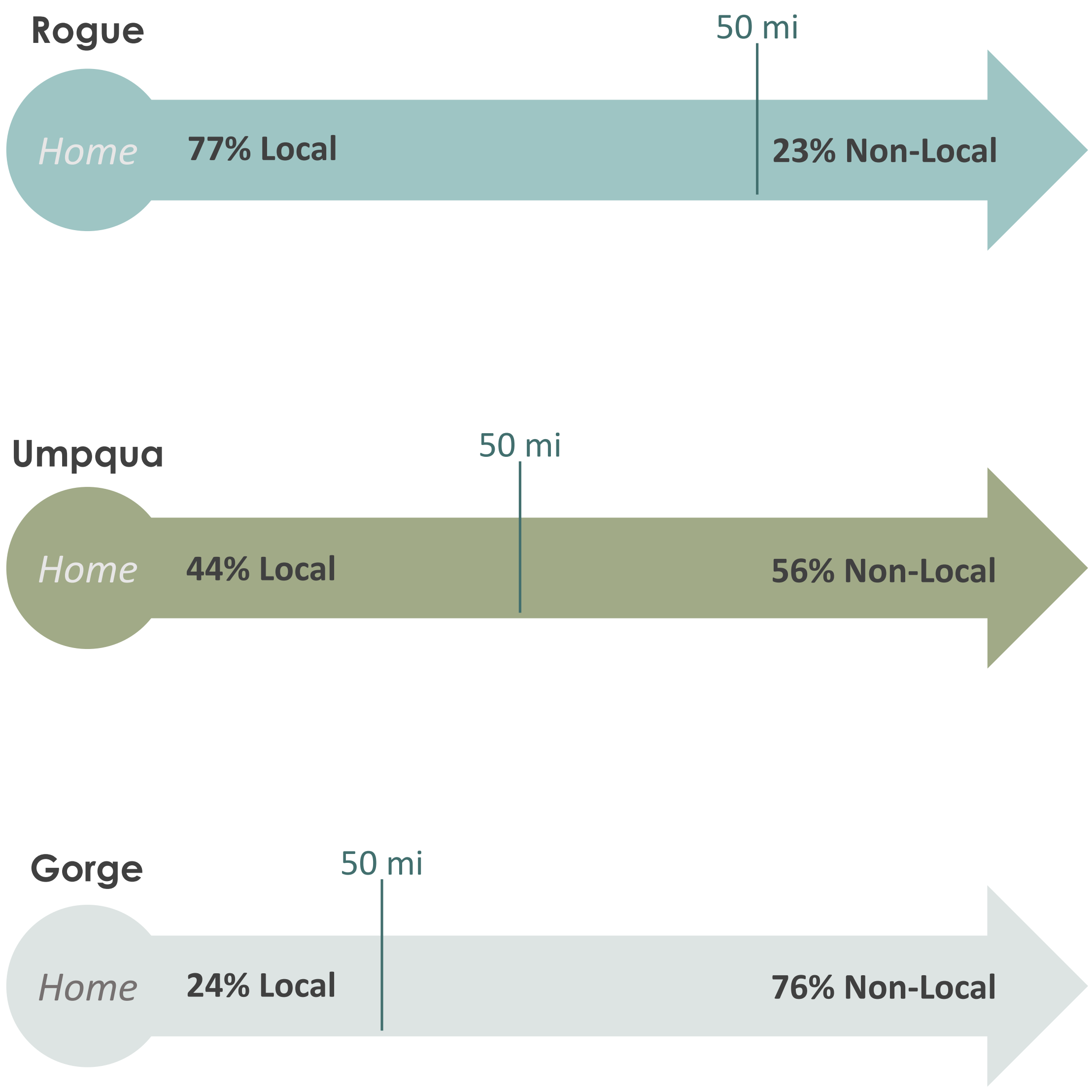
Travel Oregon defines "visitors" as those who either stay at least one night and/or those who travel more than 50 miles to reach their destination.

In this study, we use the terms **local** and **non-local** to distinguish between those who have traveled less than 50 miles (local) or more than 50 miles (non-local) to reach their destination.

Rogue Valley respondents were split approximately three-quarters to one-quarter local to non-local. Columbia Gorge respondents had the opposite distribution with one-quarter local and three-quarters non-local. Umpqua Valley respondents fell in the middle with slightly fewer local respondents than non-local respondents.

Comparison Note

The Willamette Valley survey did not ask respondents the distance they traveled to reach their destination. We therefore cannot provide the same local versus non-local breakdown for the Willamette Valley.



Which modes of transportation did you use during your trip to get to wineries? Select all that apply.

Cars rule the day for transportation to wineries - at least 80% of respondents in all three regions, both local and non-local, reported that they used a personal car to get to a winery on their trip. While the survey asked about many other varieties of transportation (including cycling, ride-share services like Lyft and Uber, taxis, and limos), only a small fraction of respondents in any region reported using non-car transportation methods.

Unsurprisingly, non-locals used rental cars at higher rates than locals, although Umpqua non-locals were less likely to rent than non-locals in the Rogue Valley and Columbia Gorge.

Although the rural nature of many tasting rooms lends itself to car-transport, the fact that anyone walks or participates in tours suggests room to promote alternative forms of transportation to wineries.

For Comparison

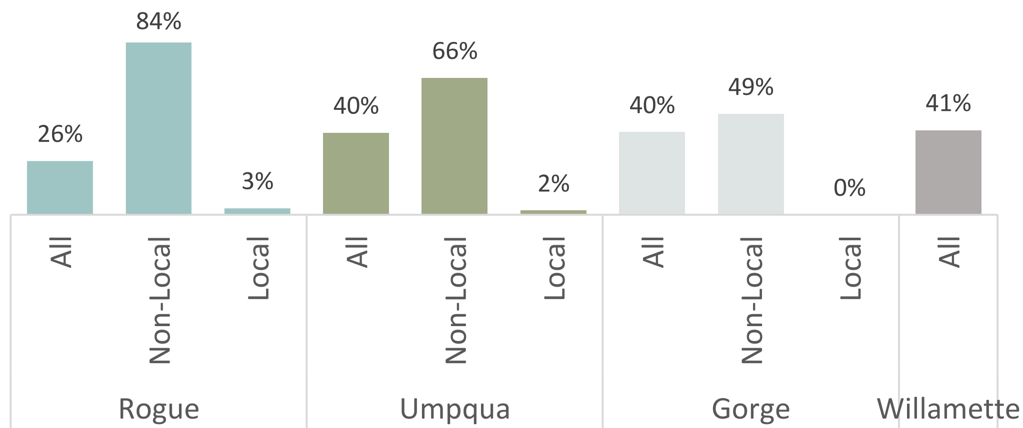
The Willamette Valley survey did not distinguish between locals and non-locals, but we can see that a greater percentage of Willamette Valley respondents used rental cars or walked compared to those in other regions.

	Personal Car	Rental Car	Walking	Tour Bus
Rogue local	96%	0%	2%	1%
Rogue non-local	84%	13%	3%	1%
Umpqua local	94%	1%	3%	4%
Umpqua non-local	89%	7%	2%	2%
Gorge local	96%	0%	2%	0%
Gorge non-local	80%	14%	6%	2%
Willamette	74%	24%	7%	3%

On this trip, did you stay overnight in the region anywhere outside your home?

About one-quarter of Rogue Valley respondents and 40% of Umpqua Valley, Columbia Gorge, and Willamette Valley respondents spent the night on their trip.

Non-locals, particularly in the Rogue Valley, spent the night at far higher rates than locals. Non-local Columbia Gorge respondents had the lowest percentage of overnight stays. The higher rates of overnight stays in the Rogue Valley may indicate that respondents consider the region to be a good overnight option and could easily locate lodging. It is also farther from a major metropolitan center, giving visitors a reason to stay longer.



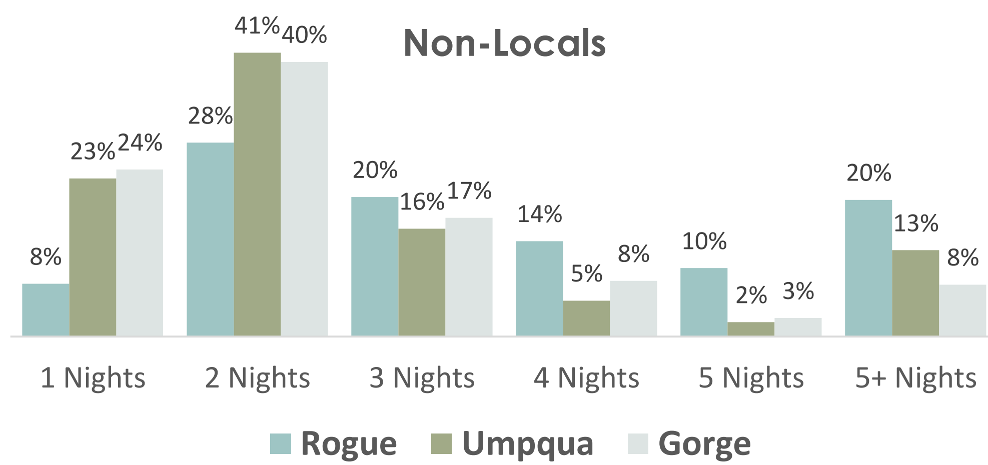
How many nights did you stay?

Non-locals (those who represent the majority of respondents who stayed overnight) in all three regions mostly spent one, two, or three nights away from home on their trip.

One-fifth of Rogue Valley respondents participated in extended trips of more than five days, a higher proportion than in the other regions. Taken with the high percentage of non-locals who stayed overnight, this suggests that the Rogue Valley may have a more robust market for vacations.

For Comparison

Willamette Valley respondents took trips with shorter average stays than any other region (although this comparison combines both local and non-local respondents).



	Rogue Non-Local	Umpqua Non-Local	Gorge Non-Local	Willamette
Average Nights Spent	3.7	2.7	2.5	1.4

Where did you stay overnight while in the region?

Hotels or motels were non-local respondents' most commonly used accommodation across all three regions.

In the Rogue and Umpqua Valleys, about one-fifth of respondents also stayed with family or friends. In the Columbia Gorge, this was a less popular option and slightly higher percentages of respondents stayed in an Airbnb or VRBO compared to Rogue and Umpqua Valley respondents.

While the survey also asked about staying in a second home, renting a cabin, or camping, respondents did not report much use of any of these options.

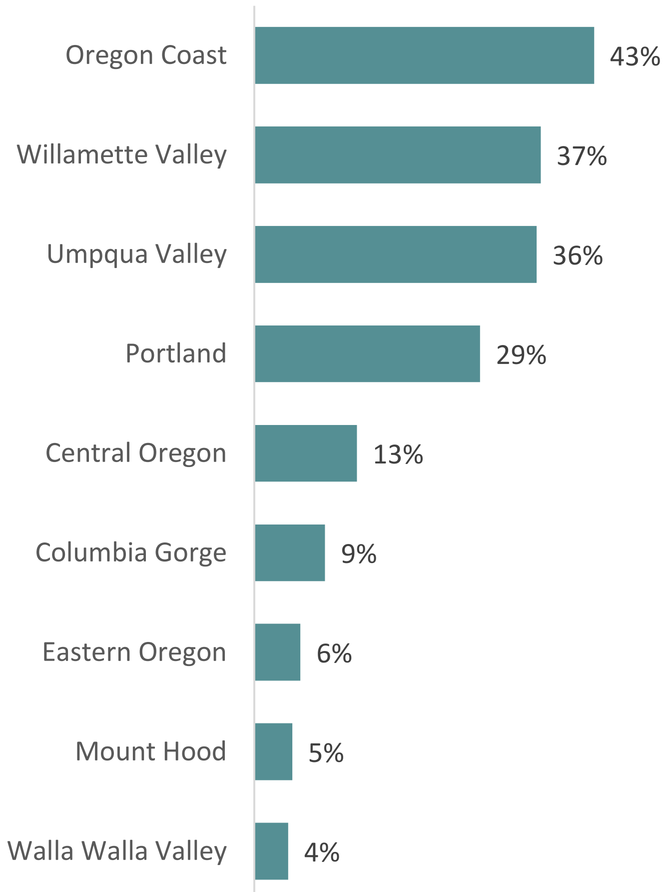
For Comparison

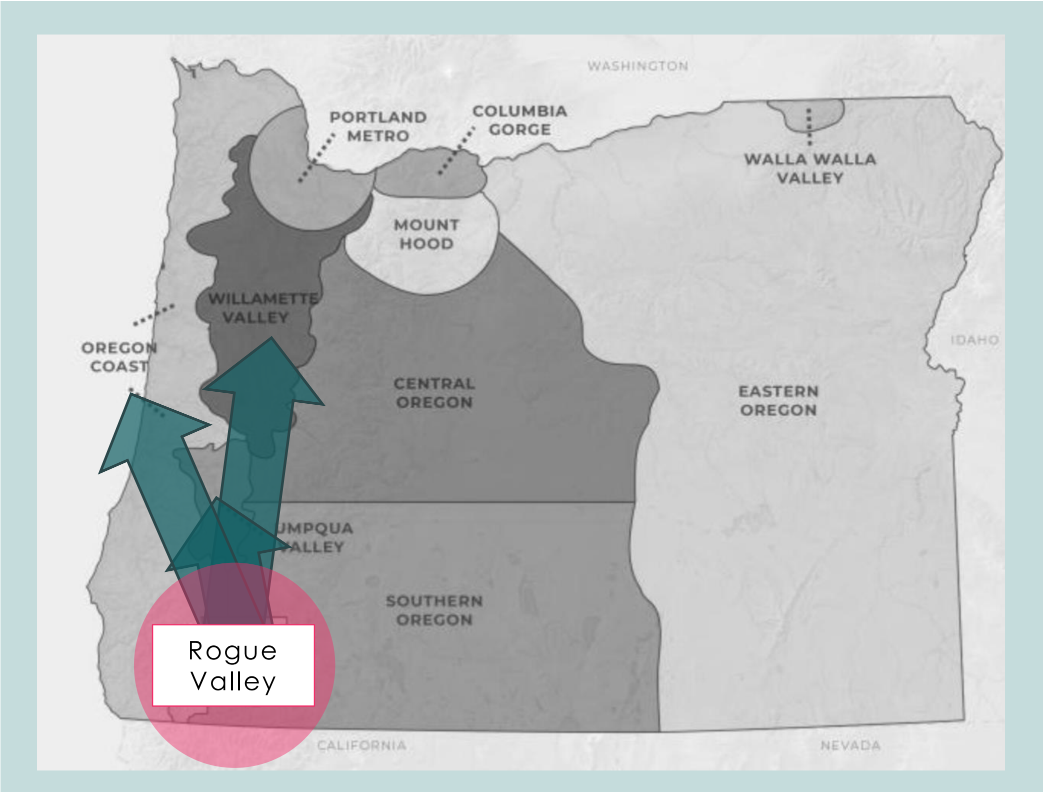
Willamette Valley respondents' habits align somewhat with the other regions, but higher percentages of respondents used bed & breakfasts or vacation rental services. This may indicate that the Willamette Valley is better equipped with these lodging options than other regions, which may have less well-built-out options.

	Hotel or Motel	Friend/ Family Residence	Bed & Breakfast or Inn	Airbnb or VRBO
Rogue Non-local	41%	21%	15%	12%
Umpqua Non-local	48%	22%	5%	9%
Gorge Non-Local	57%	10%	8%	14%
Willamette	40%	12%	21%	19%

Winery survey respondents in all regions including the Willamette used non-hotel/motel lodging options at higher rates than the general Oregon overnight visitor. Longwoods International estimated that in 2017, 66% of Oregon's overnight visitors used hotels or motels, with fewer than 10% staying in any other form of accommodation except campgrounds/RV campgrounds (17% stayed in campgrounds).

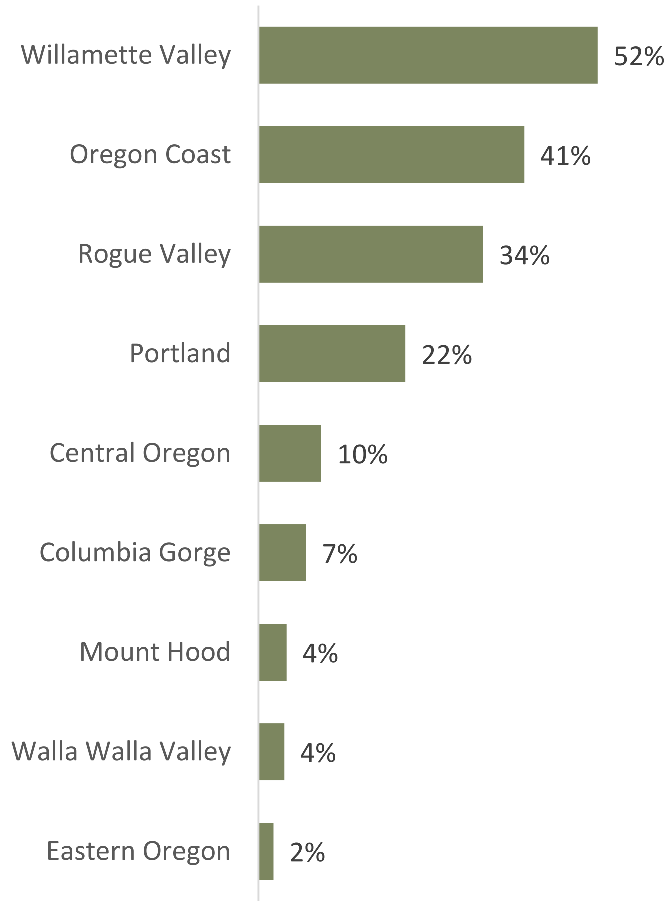
Which other Oregon destinations outside of the Rogue Valley did you visit on this trip?

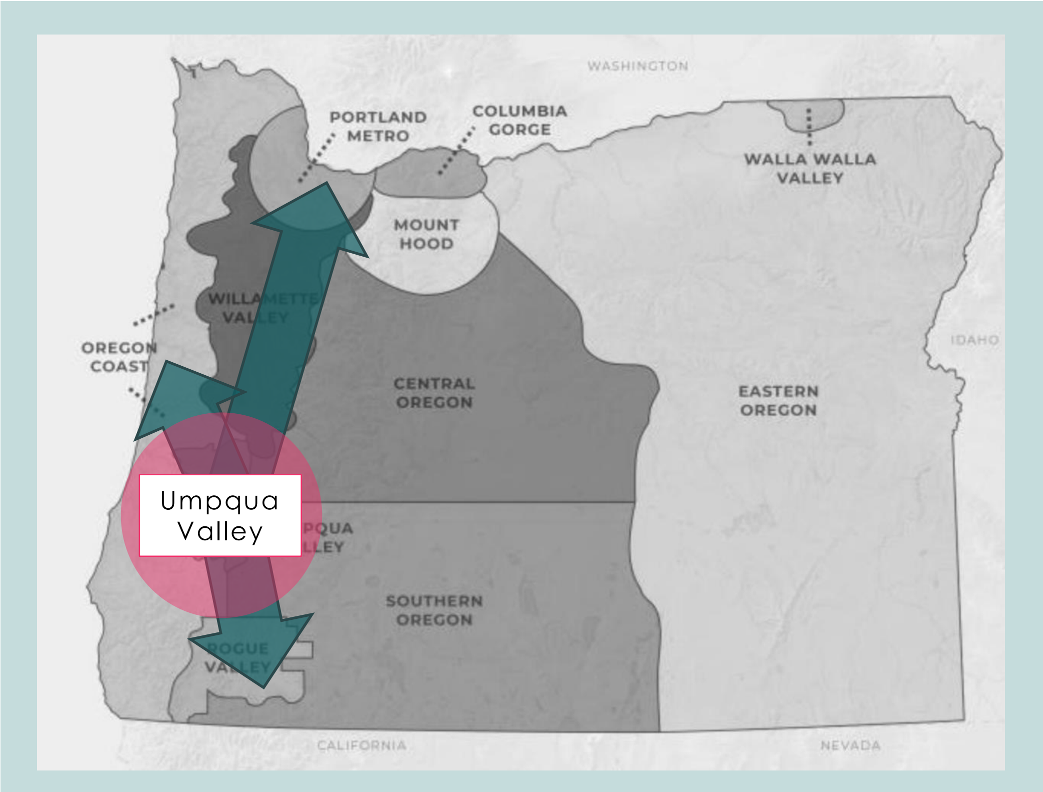




Rogue Valley respondents, as with respondents in all other regions, tend to travel at the highest rates to locations that are in close proximity. Here we see that Rogue Valley respondents traveled at higher rates to the Oregon Coast, Willamette Valley, and Umpqua Valley. Portland is also a notable destination for Rogue Valley respondents, suggesting that respondents may fly in to the state's transportation hub before heading south.

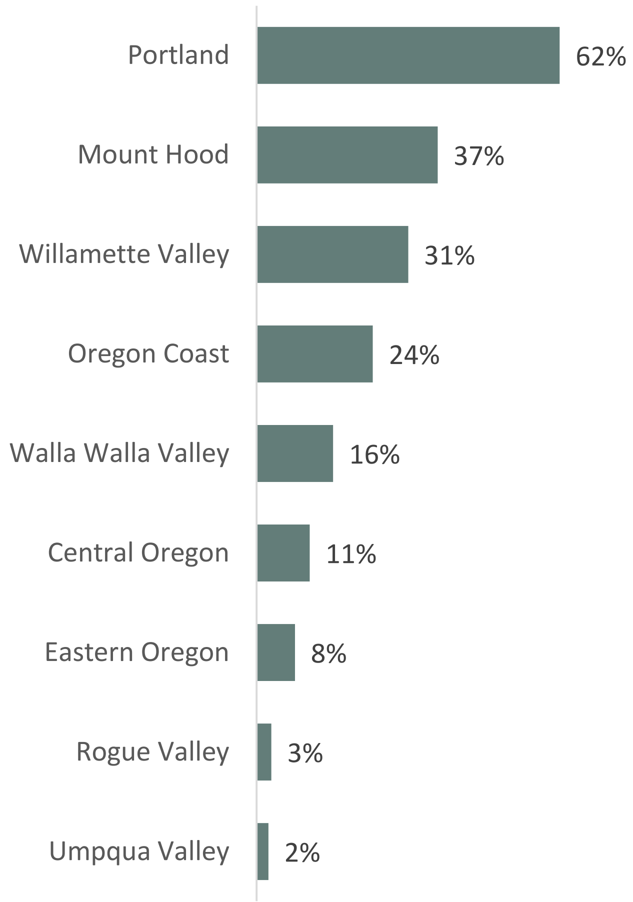
Which other Oregon destinations outside of the Umpqua Valley did you visit on this trip?

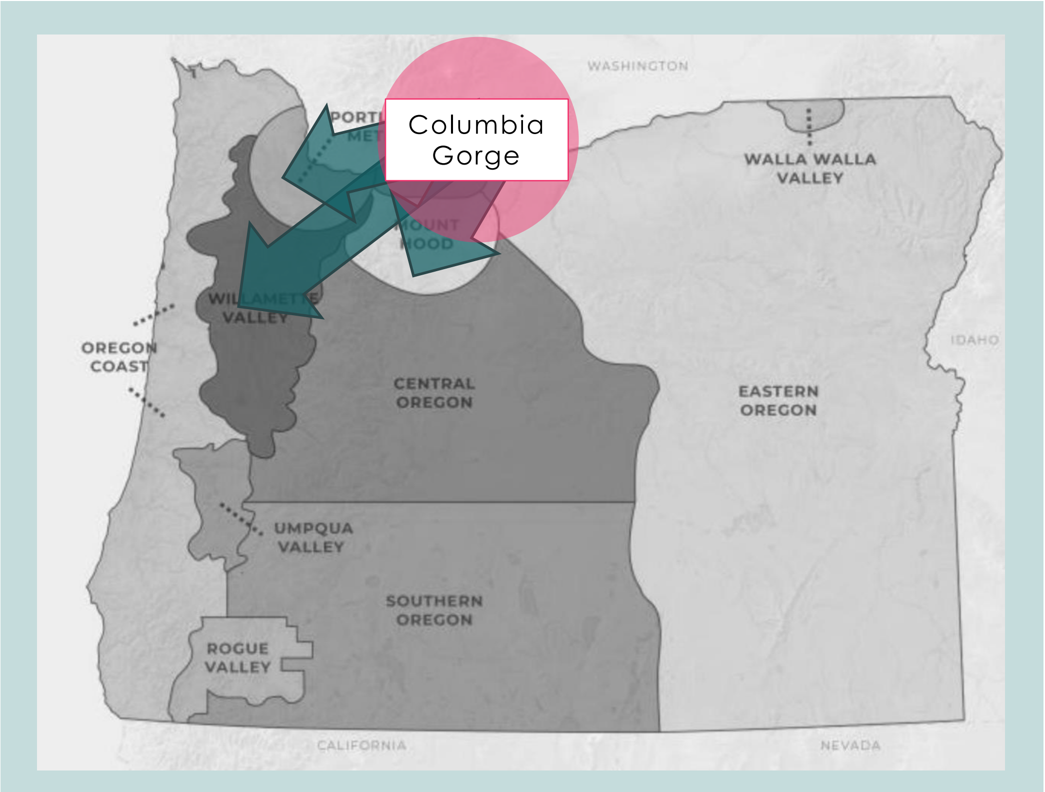




Umpqua Valley respondents, as with respondents in all other regions, tend to travel at the highest rates to locations that are in close proximity. Here we see that Umpqua Valley respondents traveled at higher rates to the Willamette Valley, Oregon Coast, and Rogue Valley. Portland is also a notable destination for Umpqua Valley respondents, suggesting that respondents may fly in to the state's transportation hub before heading south.

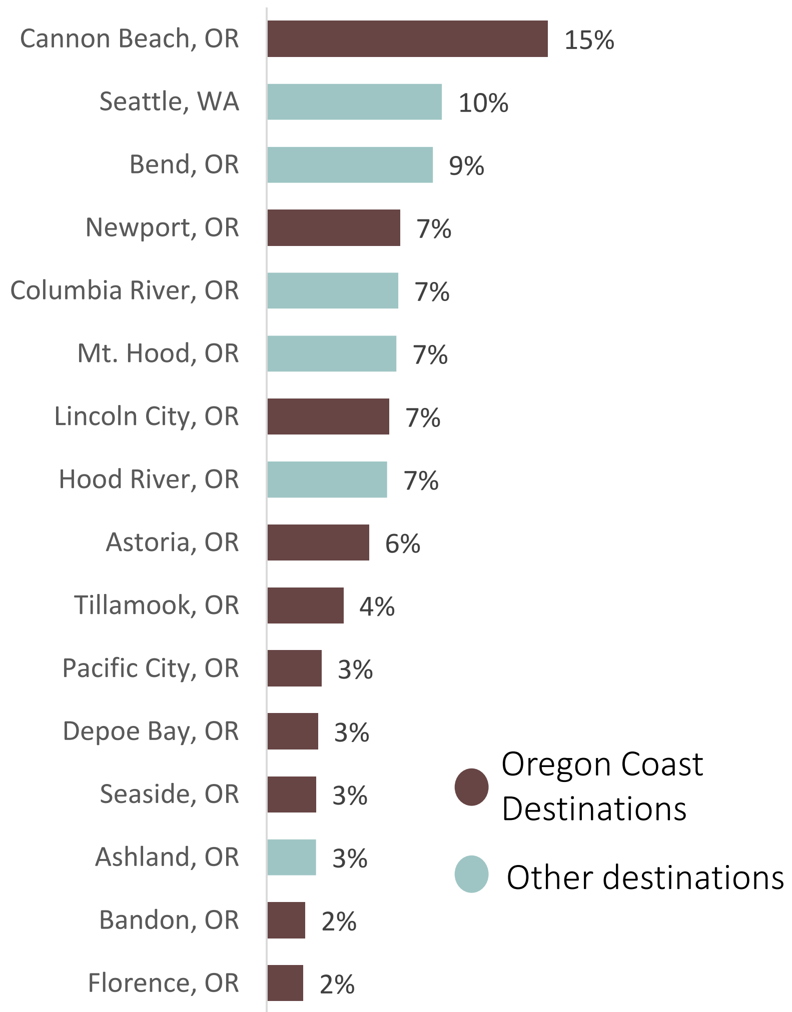
Which other Oregon destinations outside of the Columbia Gorge did you visit on this trip?

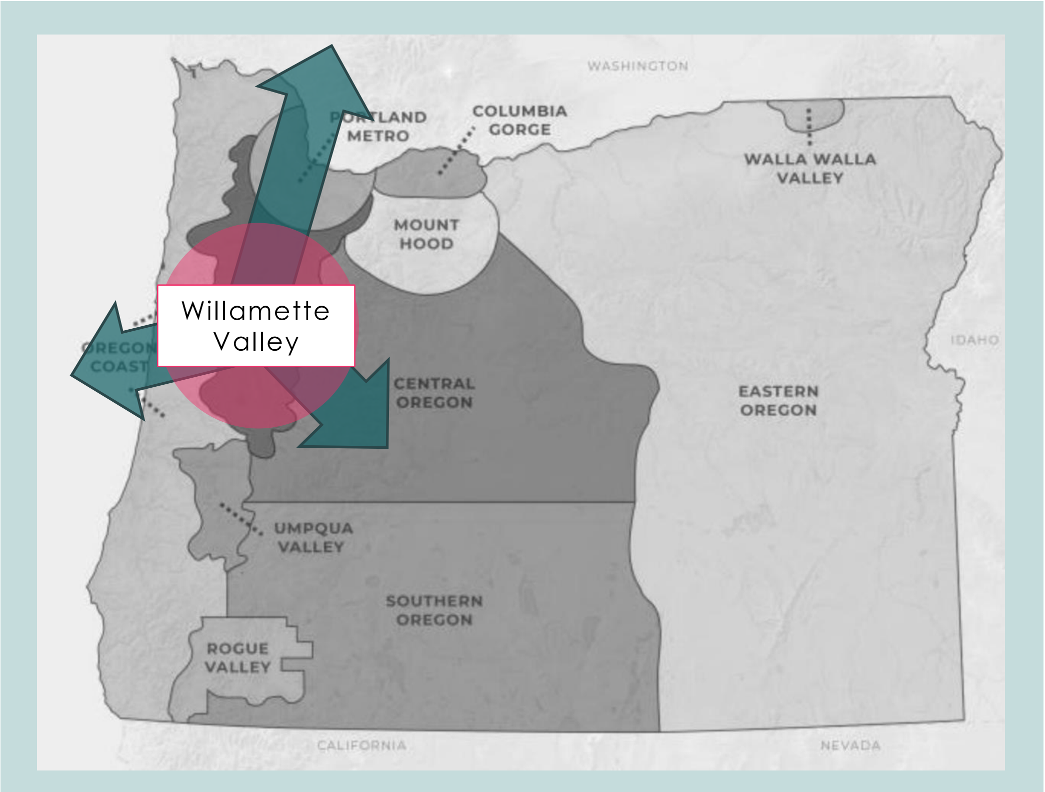




Columbia Gorge respondents, as with respondents in all other regions, tend to travel at the highest rates to locations that are in close proximity. Here we see that Columbia Gorge respondents traveled at higher rates to Portland, Mount Hood, and the Willamette Valley. The Oregon Coast is also a notable destination for Columbia Gorge respondents, aligning with the fact that the Oregon Coast is a popular draw for many Oregon travelers.

Other destinations visited by Willamette Valley survey respondents:





Willamette Valley respondents, as with respondents in all other regions, tend to travel at the highest rates to locations that are in close proximity. Since the Willamette Valley survey asked a slightly different question about other destinations traveled, there is no direct comparison to the Rogue Valley, Umpqua Valley, and Columbia Gorge. While a handful of Willamette Valley respondents headed to the Columbia Gorge, higher percentages headed for a coastal destination, Seattle, or Bend. There could be significant opportunity for the Rogue Valley, Umpqua Valley, and Columbia Gorge to market themselves as additional wine destinations to Willamette Valley visitors.

What other activities did you participate in while in the region as part of your trip?

Dining complemented respondents' trips at higher rates than any other activity for both locals and non-locals across all regions (although non-locals dined out at slightly higher rates than locals). Food, it seems, was an important pairing to wine tasting during respondents' trips.

While the survey asked about many different activities (including camping, visiting historical sites, national/state parks, spas, clubs/nightlife, casinos, and business travel), shopping, outdoor recreation, visiting breweries or distilleries, and festivals/special events rose to the top as popular additional activities. Rates of participation in these activities was fairly similar across regions and locals/non-locals, with the exception of special events in the Rogue Valley, which had far higher participation rates than other regions (likely because of the Shakespeare and Britt Festivals).

For Comparison

Compared to the Willamette Valley, Rogue Valley, Umpqua Valley, and Columbia Gorge respondents generally participated at higher rates in most activities, suggesting that non-Willamette visitors tack more activities onto their winery visits.

	Dining	Shopping	Outdoor recreation	Brewery or distillery	Festival/ Special Event
Rogue local	69%	29%	25%	19%	27%
Rogue non-local	72%	41%	31%	25%	31%
Umpqua local	66%	20%	25%	31%	11%
Umpqua non-local	75%	24%	24%	21%	10%
Gorge local	65%	29%	34%	28%	9%
Gorge non-local	69%	27%	29%	31%	5%
Willamette	59%	22%	17%	16%	7%

Compared to the general Oregon overnight visitor, winery survey respondents generally shopped at similar rates but participated in nature park or historical/cultural site visits at lower rates. Longwoods International estimated that in 2017, 31% of Oregon's overnight visitors shopped, with 19% and 15% visiting landmark/historic sites and national/state parks respectively. Longwoods International reports outdoor activities differently than this winery study, so it is difficult to compare outdoor recreation participation rates across groups, but winery survey respondents seem generally aligned with the general Oregon overnight visitor (although Willamette Valley respondents seem to participate in outdoor recreation at lower rates than average).

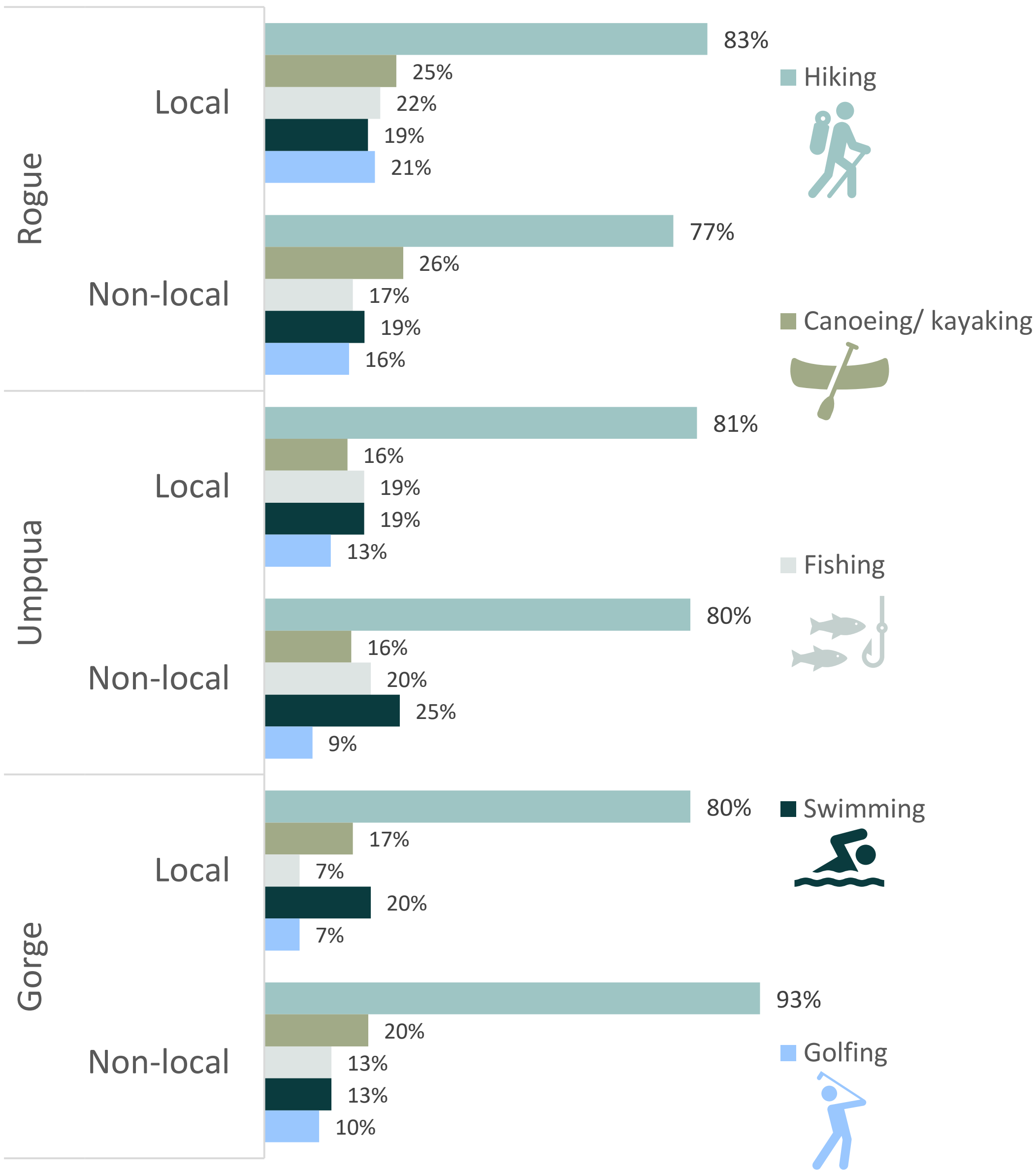
If you participated in an outdoor activity, what type of outdoor recreation did you do?

Since outdoor recreation is an important and prominent component of the Oregon brand, we asked winery survey respondents for more details about their outdoor recreation pursuits. The information presented here shows participation rates in outdoor activities *only for the 20% to 30% of winery survey respondents who said they participated in outdoor activities on their trip.*

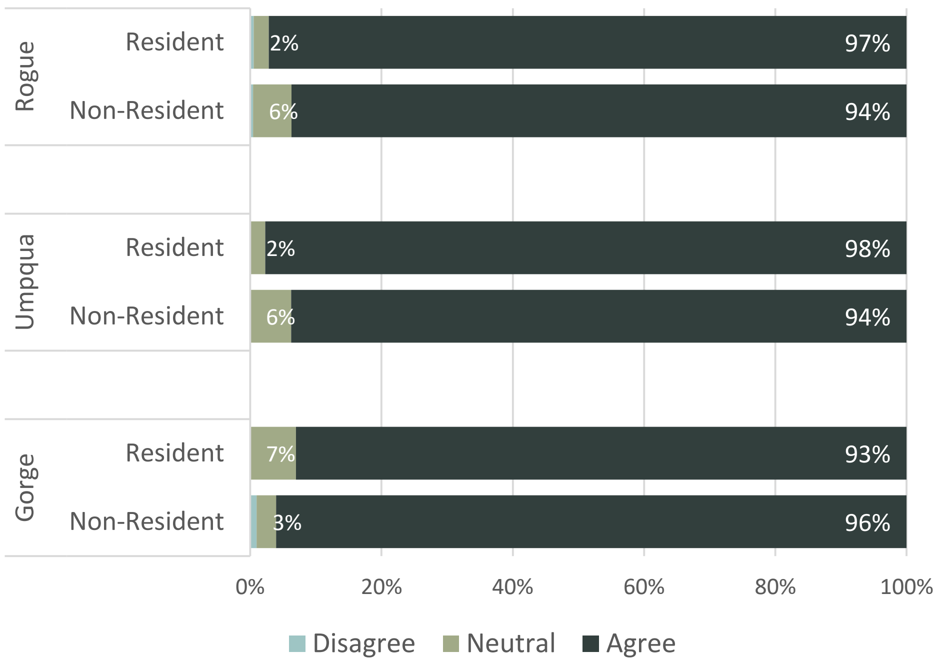
Hiking for both locals and non-locals in all three regions had by far the highest participation rates. The next most popular activities were canoeing/kayaking, fishing, swimming, and golfing. Participation rates in these activities did not vary greatly region to region or between locals and non-locals.

Interestingly, road cycling and mountain biking, often considered popular Oregon activities, had very low participation rates for winery survey respondents. A notable exception to this came from Columbia Gorge respondents, 17% of whose locals participated in both road cycling and mountain biking.

Although only about a quarter to a third of survey respondents participated in outdoor recreation, this breakdown of activities offers wine industry and travel professionals ideas for where to cross-market wine and outdoor activities.



"I am very likely to recommend a trip to the region to others."



Almost all respondents in all three regions reported that they were very likely to recommend a trip to the region to others, with almost no variation between regions. In the Rogue and Umpqua Valleys, slightly lower percentages of non-residents were very likely to recommend a trip than residents of the regions. The reverse was true in for the Columbia Gorge. This suggests that respondents' experience was positive enough to inspire them to share and promote it to others. Regional promoters should consider methods for leveraging visitors' positive experience to draw more new visitors to the region. Word-of-mouth and personal recommendation are powerful motivators that might inspire future visits.

WINE-SPECIFIC TRIP BEHAVIORS

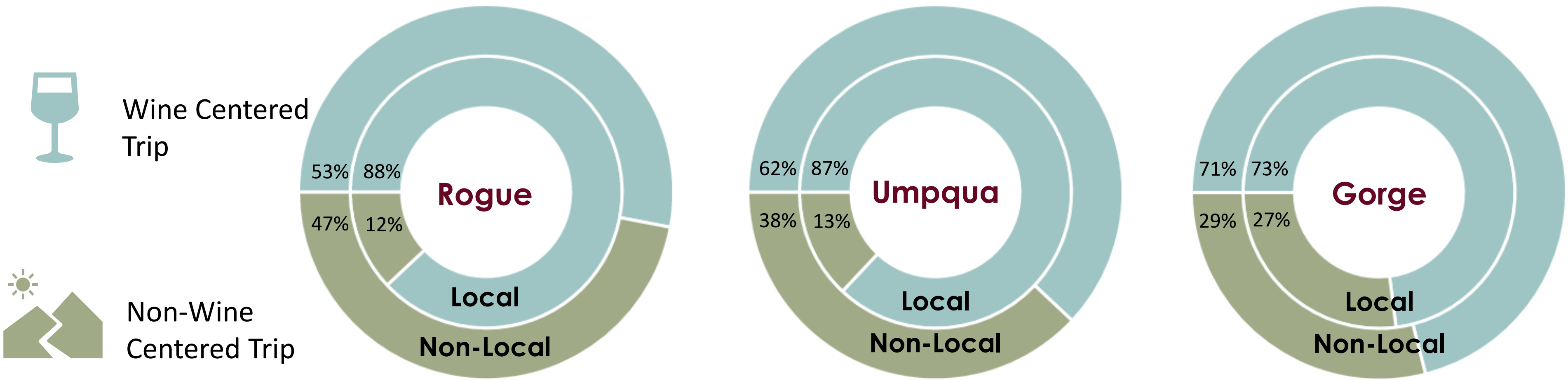
This section includes information about characteristics of respondents' trips that are specific to wine-related activities. It covers the following topics:

- **Trip Profile –** Was the primary purpose of the trip to visit wineries? How many wineries did respondents visit?
- **Wine Trip Motivations & Preferences –** How did respondents choose which wineries to visit? What factors primarily influenced their decision to visit a particular winery? What factors were most important for creating an enjoyable winery experience?
- **Wine Purchasing & Wine Club Behavior –** Did respondents purchase wine and sign up for wine clubs during their visit? If not, why?
- **Trip Impact –** Are respondents likely to recommend wines from the region to others? Are they likely to purchase wines from the region?

We can draw several conclusions about respondents' behaviors and preferences around visiting wineries:

- Visiting wineries was the primary purpose of most respondents' trip (74%), and most respondents visited between one and three wineries on their trip.
- Although respondents used tools like websites, travel guides, and road signs, word-of-mouth was the most common resource used to select which wineries to visit.
- Three factors stood out as particularly desirable characteristics of wineries: the quality and ambiance of the facility, natural beauty of the setting, and friendliness/hospitality of the staff.
- About 86% of respondents bought wine during their trip, and those who purchased wine purchased 7.5 bottles on average. Most respondents did not join wine clubs (as many of them were already members).
- Over 80% of all respondents were likely to recommend the region's wine. More than 60% were likely to buy wine from the region.

Was the primary purpose of your trip to visit a winery or wineries?



The majority of respondents, both local and non-local across all regions said that the primary purpose of their trip was to visit wineries.

In all three regions, a larger proportion of locals took wine-centered trips than non-locals (although the difference in the Columbia Gorge was much smaller than in other regions). This suggests that although many visitors from farther away are visiting specifically for the wine, these non-locals are more likely than locals to be tacking winery visits on to a trip that has other primary motivations.

For Comparison

Longwoods International estimated that in 2017, 8% of Oregon's visitors visited wineries as part of their trip. Using the data provided by this study, we can estimate that of the 8% of visitors to Oregon who visit wineries, over half are building their trip around experiencing Oregon's wineries.

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

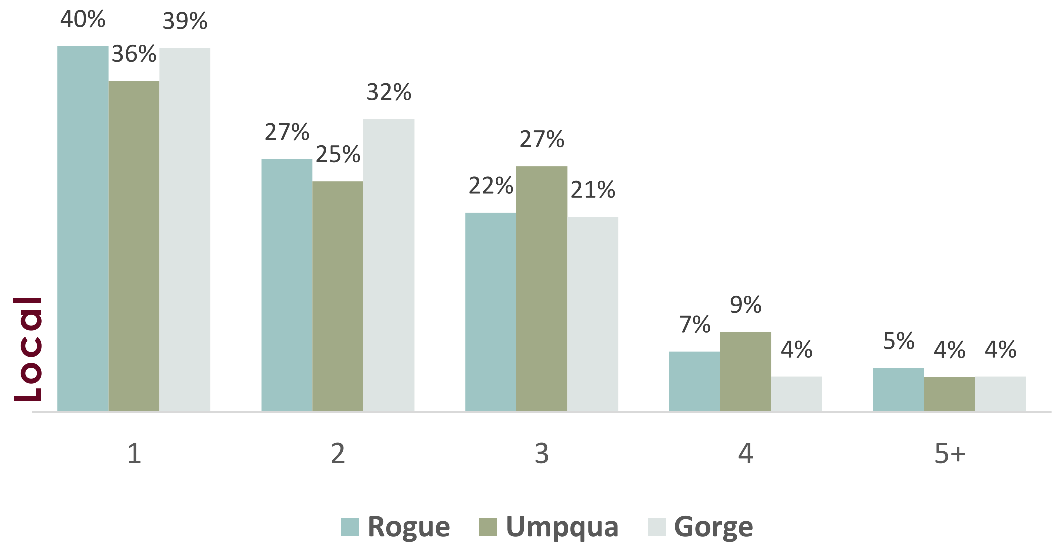
In all three regions, over three-quarters of respondents visited between one and three wineries. The majority of respondents visited multiple wineries.

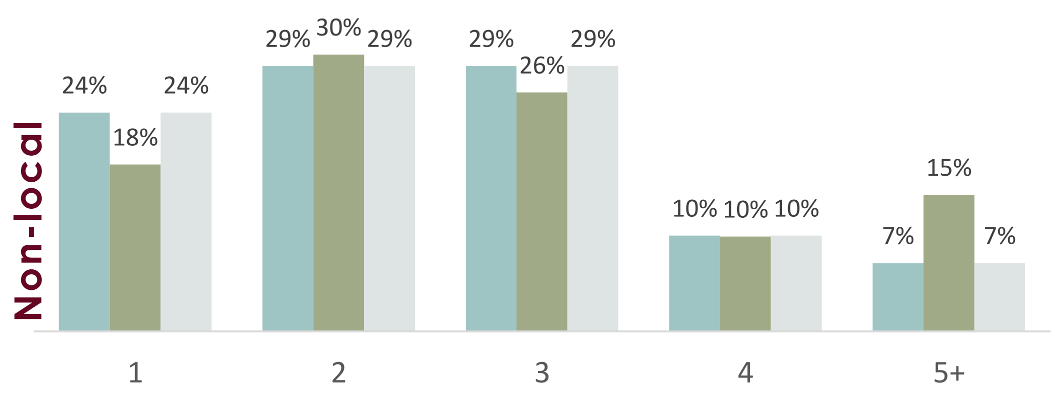
A larger proportion of non-locals visited multiple wineries than locals. Around three-quarters of non-locals visited two or more wineries, while just under two-thirds of locals visited two or more wineries. It seems that those traveling greater distances may try to fit in visits to more wineries than those who live close by. This makes sense given that locals can more easily access wineries whenever they choose and so have less need to fit multiple winery visits into a single trip.

There was little variation between regions, although both local and non-local Umpqua Valley respondents reported visiting multiple wineries at higher rates than respondents in other regions.

For Comparison

Willamette Valley respondents reported visiting more wineries on average than any other region. While this variation could be caused by methodological differences in the two studies, it is also possible that Willamette Valley winery visitors do fit more wineries into their trips, suggesting a different visitor type. It is possible that these visitors go to more wineries, but spend less time at each winery.





	Rogue Local	Rogue Non-Local	Umpqua Local	Umpqua Non-Local	Gorge Local	Gorge Non-Local	Willamette Valley
Avg. # Wineries Visited	2.2	2.5	2.2	3.0	2.1	2.5	3.7

Which of the following resources did you use to select the wineries and tasting rooms you visited as part of your trip? Respondents could select multiple options. The top responses are reported.

	Rogue			Umpqua			Gorge		
	All	Local	Non-Local	All	Local	Non-Local	All	Local	Non-Local
Word of mouth	54%	54%	56%	47%	49%	48%	42%	46%	43%
Website(s) of individual winery	17%	15%	19%	20%	8%	20%	21%	18%	17%
Free travel guide/ brochure/ map	9%	5%	13%	19%	9%	21%	21%	12%	16%
Regional wine association website*	12%	10%	14%	18%	13%	19%	9%	6%	8%
Wine publication (e.g. Wine Spectator)	14%	11%	14%	13%	5%	14%	13%	8%	12%
Road signs/ billboards	8%	6%	10%	14%	10%	16%	14%	5%	16%
Social Media	8%	9%	9%	6%	9%	4%	8%	11%	5%
Other	23%	26%	20%	24%	33%	21%	19%	23%	21%

*Rogue: Applegate Valley Wine Trail Website; Umpqua: Umpqua Valley Winegrowers Website; Gorge: Columbia Gorge Winegrowers Website

Which of the following resources did you use to select the wineries and tasting rooms you visited as part of your trip?

Respondents could select multiple options.

Across all three regions, word of mouth was by far the most common resource respondents used to select which wineries they would visit. Many respondents in all regions also used websites of individual wineries (with the exception of Umpqua Valley locals who used winery websites at lower rates than all other respondents). Respondents across all three regions who selected “other” most commonly said that they already had familiarity with the winery or wineries because of past visits.

In the Umpqua Valley and Columbia Gorge, many respondents used free travel guides. In the Rogue Valley, respondents were more likely to use the Applegate Valley Wine Trail Website and wine publications to make their winery selections. In the Umpqua Valley, respondents used the Umpqua Valley Winegrowers Website almost as frequently as they used free travel guides.

There was little variation between which resources local and non-local respondents used in the Rogue Valley and Columbia Gorge. In the Umpqua Valley, however, local respondents used most resources at lower rates than non-locals. This could indicate that Umpqua Valley locals are already quite familiar with the wineries in their area and therefore don’t need to rely on many resources to help them find wineries.

Respondents in all regions relied on social media at lower rates than other resources. This is possibly related to respondents’ older age demographic. In the Umpqua Valley and Columbia Gorge, locals used social media at higher rates than non-locals, suggesting that perhaps those in close proximity to wineries are more likely to be following their local wineries or seeing sponsored ads (if ads are used).

The other options respondents could select from included referrals from professionals, travel websites, review websites, travel agencies, and mapping websites like Google, but these resources were used at much lower levels than word of mouth, winery/wine association websites, travel guides, wine publications, and road signs.

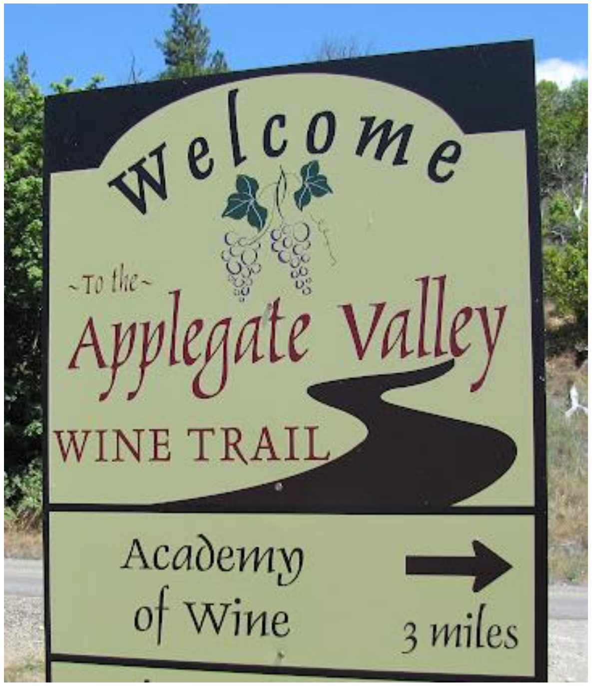


Photo courtesy of Erik Wait, http://oregonwinetastingadventures.blogspot.com/2012/07/bridgeview-vineyards-and-winery.html

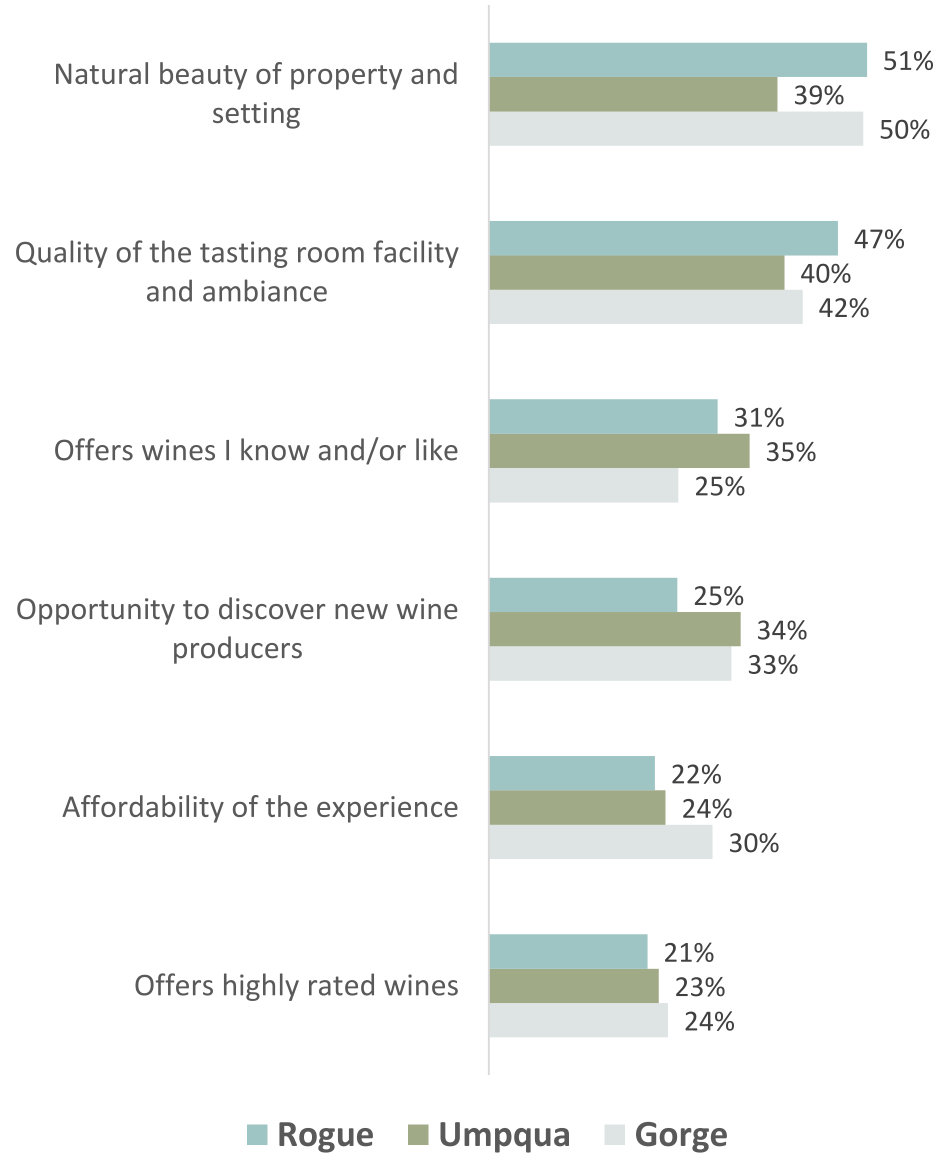
In general, which of the following reasons are most important to you in choosing which wineries to visit? *Respondents could select multiple options. The top responses are reported.*

Across regions, respondents valued wineries that offered natural beauty, a high quality facility, and familiar wines. To a lesser extent, respondents were drawn to tasting rooms by factors related to the types of wine offered and by affordability. This suggests that the overall experience of the winery is important to more respondents than factors related to the types of wines offered. Other studies have also demonstrated that, particularly for visitors who are less wine-knowledgeable, experience and setting are important for motivating visits to wineries.

Respondents for each region indicated similar reasons as being important for choosing which wineries to visit with a few exceptions:

- In the Rogue Valley and Columbia Gorge, natural beauty was important to more respondents than in the Umpqua Valley.
- In the Umpqua Valley, the availability of familiar wines was important to more respondents than in other regions.
- In the Columbia Gorge, affordability was important to more respondents than in other regions.

In addition to the options listed here, respondents could also select ease of access, factors related to the variety or exclusivity of wines offered, presence of sustainable practices, and a special event taking place at the winery. No more than 20% of respondents in any region selected these options.

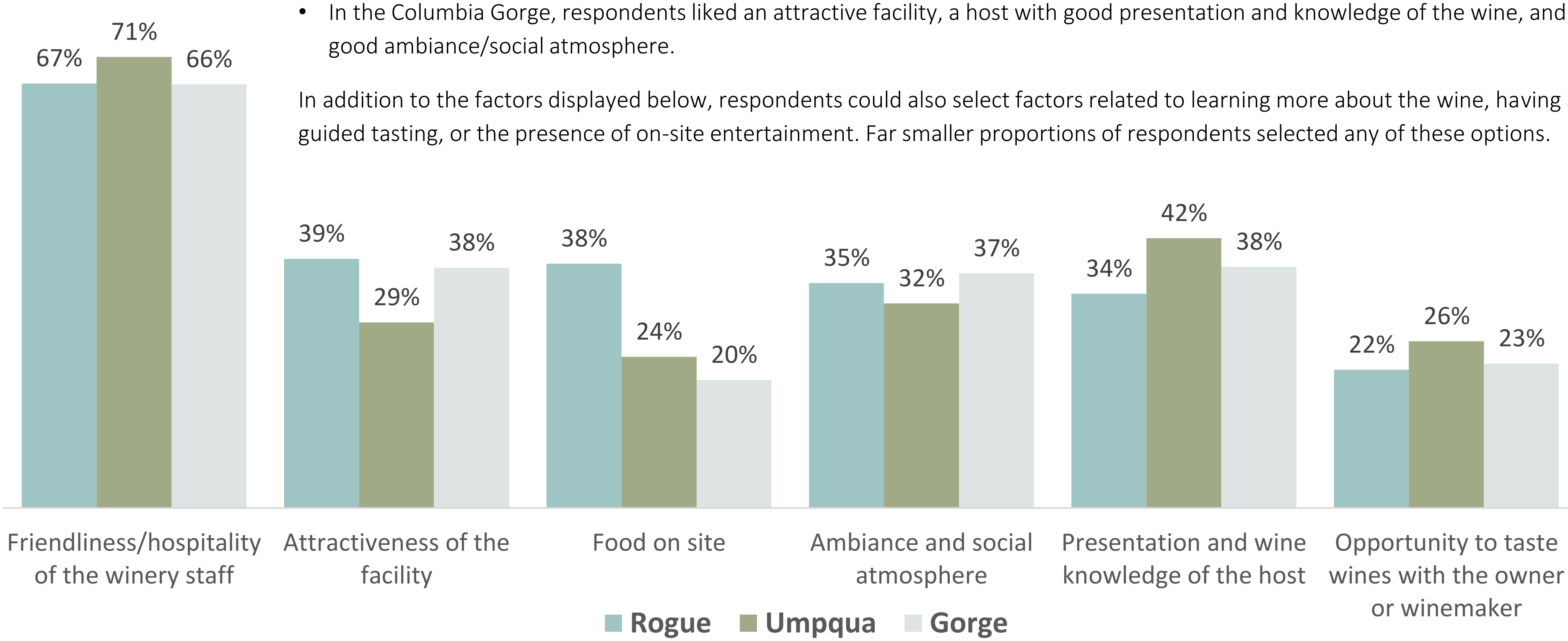


In general, which of the following factors are most important to you for creating an enjoyable experience at a winery? *Respondents could select up to three options. The top responses are reported.*

In addition to asking respondents what drew them to a winery in the first place (see Trip Motivations & Preferences – Reason for Winery Visit), we wanted to understand what factors created an enjoyable experience once visitors were at the winery. Similar to the top responses for what drew respondents to wineries, respondents selected experience-based factors over other factors they encountered at the winery. Friendliness and hospitality of the winery staff was by far the most important factor in all three regions. The factor with the second-highest proportion of respondents varied by region:

- In the Rogue Valley, respondents liked an attractive facility and on-site food.
- In the Umpqua Valley, respondents liked a host with good presentation and knowledge of the wine.
- In the Columbia Gorge, respondents liked an attractive facility, a host with good presentation and knowledge of the wine, and a good ambiance/social atmosphere.

In addition to the factors displayed below, respondents could also select factors related to learning more about the wine, having a guided tasting, or the presence of on-site entertainment. Far smaller proportions of respondents selected any of these options.



Average number of wine bottles purchased per party per trip:

Non-locals in the Rogue and Umpqua Valleys purchased more bottles on average than locals. In the Columbia Gorge, the reverse was true.

For Comparison

Willamette Valley respondents reported purchasing 6.2 bottles on average. This was higher than Rogue Valley and Columbia Gorge local respondents, but lower than or on par with all other respondents.

	Rogue Local	Rogue Non-Local	Umpqua Local	Umpqua Non-Local	Gorge Local	Gorge Non-Local	Willamette Valley
Avg. # Bottles Purchased	5.7	10.5	7.4	10.8	4.3	6.2	6.2
% that didn't purchase wine	18%	9%	19%	3%	14%	10%	-

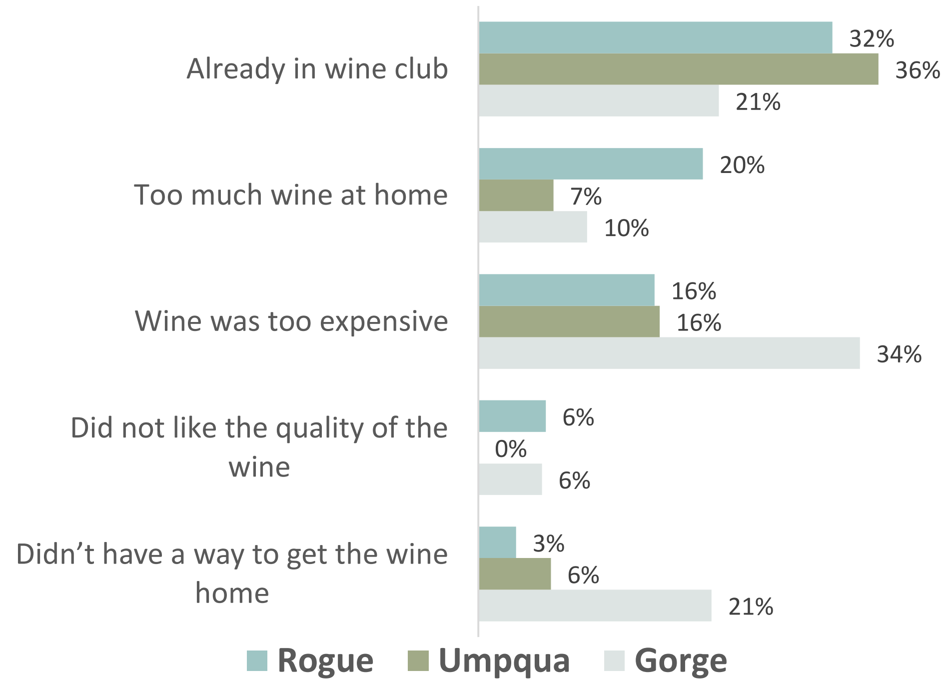
What were your reasons for not purchasing bottles of wine on your trip?

For respondents who did not purchase wine during their trip, the highest proportion of respondents in the Rogue and Umpqua Valleys cited already being in a wine club (and therefore not needing to purchase more). In the Columbia Gorge, the highest proportion of respondents said that the wine was too expensive.

Many also indicated that they already had too much wine at home and did not need any more.

In the Columbia Gorge, one-fifth of respondents said that they didn't have a way to get the wine home, suggesting that Columbia Gorge wineries should pay particular attention to ensuring customers understand the options for wine transport.

Very few or no respondents said that they didn't buy wine because they didn't like the type of wine or because they experienced poor service.



Prior to your visit, were you a member of any wine clubs of wineries in the region of study?

Not surprisingly, more locals than non-locals were already members of wine clubs in the region where they visited wineries. In the Columbia Gorge, the difference between locals and non-locals was smaller than in other regions, perhaps because Portland-area residents (the origin of many Columbia Gorge non-locals) are also likely to belong to Gorge wine clubs.

	Rogue Local	Rogue Non-Local	Umpqua Local	Umpqua Non-Local	Gorge Local	Gorge Non-Local	Willamette Valley
% prior wine club members	79%	55%	80%	52%	45%	39%	58%

For Comparison

Willamette Valley respondents were less likely than Rogue and Umpqua Valley locals but more likely than all non-locals to already be wine club members.

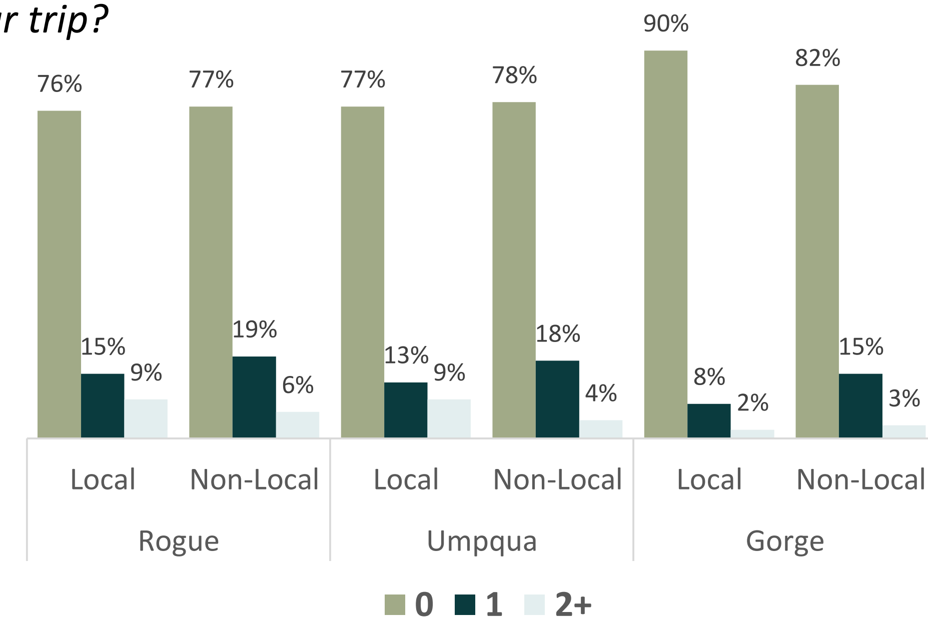
How many wine clubs did you sign up for during your trip?

Less than one-quarter of survey respondents (both local and non-local) signed up for wine clubs during their trip. Local and non-local respondents in the Columbia Gorge signed up for wine clubs at lower rates than in the other two regions.

Those who did sign up for a wine club were more likely to sign up for one than for multiple wine clubs.

For Comparison

On average, 24% of Willamette Valley respondents signed up for wine clubs during their trip. This means that Willamette Valley respondents were about as likely as respondents in the Rogue and Umpqua Valleys to sign up for wine clubs and slightly more likely than Columbia Gorge respondents.



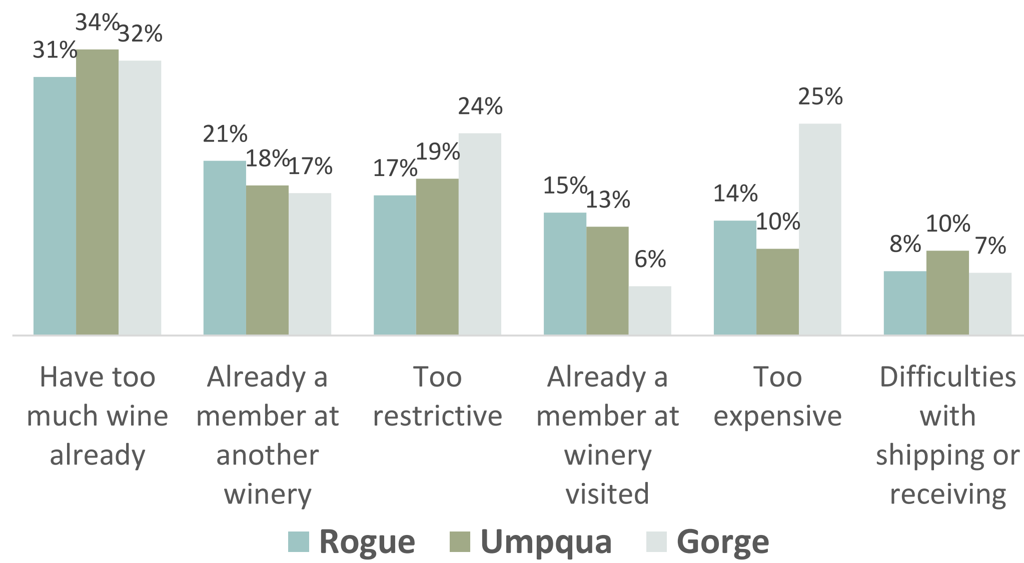
What were your reasons for not signing up for a wine club on your trip?

We asked respondents who said they hadn't signed up for a wine club during their trip why they chose not to. About one third of respondents in all regions said they already had too much wine. Many respondents also wrote in that they were already a member at the winery they were visiting or already a member at other wineries.

In the Columbia Gorge, a larger proportion of respondents than in other regions noted that wine clubs were too restrictive or that they were too expensive. Given that many more Columbia Gorge respondents thought wine clubs were too expensive than Rogue and Umpqua Valley respondents, Columbia Gorge wineries might consider comparing their pricing to wine clubs in other regions to ensure it is competitive.

In most instances, there was little variation between the reasons given by locals versus non-locals. The few exceptions included:

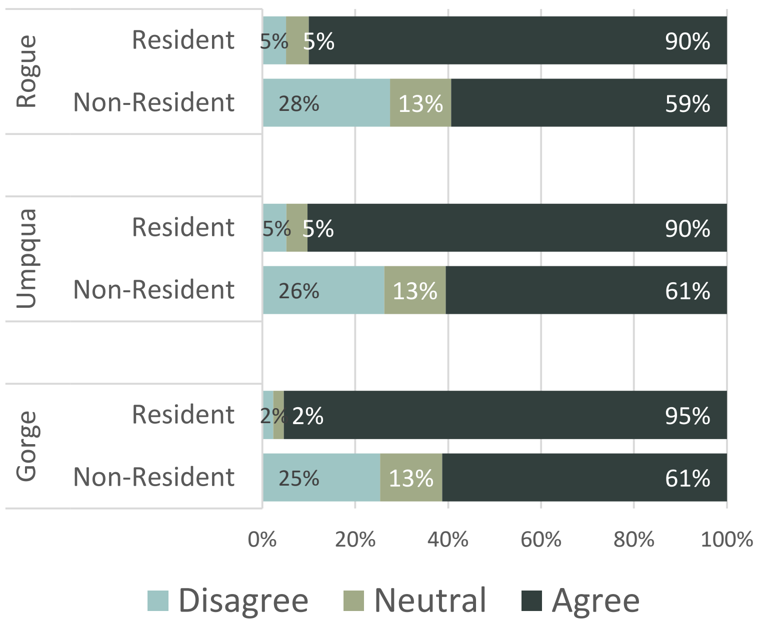
- Rogue non-locals who struggled with shipping more than Rogue locals.
- Umpqua non-locals who cited restrictiveness and shipping difficulties at higher rates than Umpqua locals.
- Gorge locals who were more likely than Gorge non-locals to say wine clubs were too expensive.



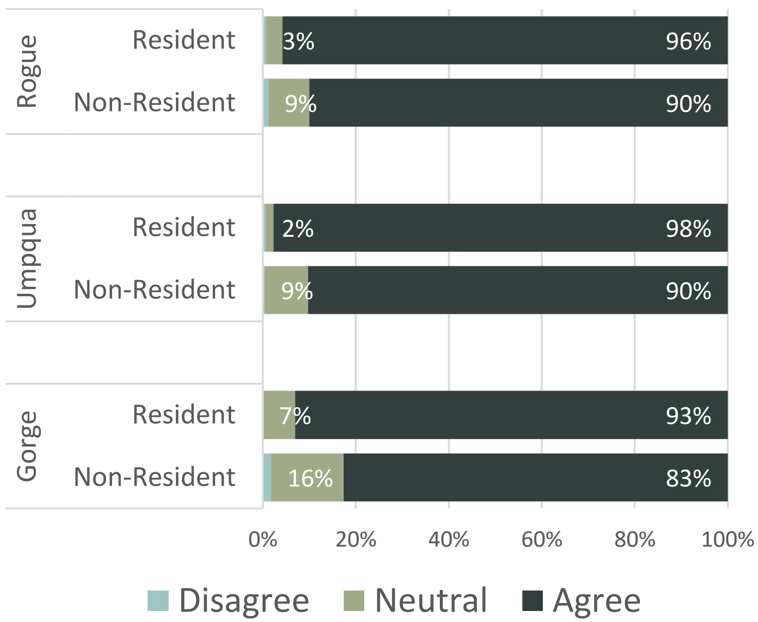
	Rogue Local	Rogue Non-Local	Umpqua Local	Umpqua Non-Local	Gorge Local	Gorge Non-Local
Have too much wine or don't need that much wine	29%	31%	29%	34%	24%	30%
Too restrictive, prefer more flexibility in my purchases	14%	15%	14%	20%	22%	21%
Joining a wine club was too expensive	14%	14%	12%	10%	32%	23%
Difficulties with shipping or receiving wine	3%	14%	3%	9%	5%	7%
Other*	51%	43%	52%	42%	37%	37%

* The majority of other responses were that respondents already belonged to wine clubs.

"I have purchased wines from this region at my local retailer or a local restaurant/bar."



"I am very likely to recommend wines from this region to others."



The majority of respondents in all three regions reported that they had both purchased wines from the region and were very likely to recommend wines from the region to others.

Fewer respondents reported purchasing wine from the region than recommending wine from the region, especially respondents who were not residents of the region. In all three regions, around one-quarter of non-resident respondents had not purchased wine. This suggests that trips to a region are more likely to inspire visitors to recommend the region's wine, but less likely to inspire them to actually purchase it.

There was little difference between regions for responses to the question of purchasing wine. For the question of recommending wine, the Columbia Gorge had a smaller proportion of respondents (both residents and non-residents) than in the Rogue and Umpqua Valleys that agreed they were very likely to recommend wines from the region to others.

TRIP & WINE SPENDING

This section includes information about respondents' spending on their trip. It covers the following topics:

- **Trip Activity** – How much on average did winery visitors spend on trip activities like lodging, dining, shopping, transportation, and recreation?
- **Wine and Wine Tasting –** How much on average did winery visitors spend on wine tasting and purchasing wine?
- **Comparisons to General Oregon Visitors –** How do winery visitors' spending habits compare to those of other Oregon visitors?

We can draw several conclusions from respondents' reported spending:

Non-Wine Related Spending

- Respondents spent the majority (more than two-thirds) of their activity money on lodging and dining.
- A little more than one-third of respondents who spent the night spent no money on lodging.
- About one-third of respondents spent no money on dining.
- On average, respondents spent $183 on trip activities per party per day.
- Non-locals generally outspent locals.

Wine Related Spending

- Respondents spent about 90% of their wine money on purchasing wine and 10% on wine tasting fees.
- A large proportion of respondents did not spend anything on wine tasting, but most (81% or more) bought wine.
- On average, respondents spent $132 on wine at wineries per party per day, $120 of which went to wine purchases.
- Non-locals always outspent locals.

Comparisons

- Winery visitors outspent the average Oregon day-tripper, mostly because of spending on wine.

Please tell us approximately how much your party spent in the region per day on the following items during this trip. *Spending figures below represent rounded averages per party per day.*

	Rogue			Umpqua			Gorge			Willamette
	All	Local	Non-Local	All	Local	Non-Local	All	Local	Non-Local	
Lodging*	$79	$92	$77	$65	-	$68	$99	-	$97	$105
Dining	$64	$56	$90	$55	$45	$63	$74	$60	$79	$123
Shopping	$19	$14	$33	$16	$11	$19	$19	$14	$20	$33
Transportation	$14	$11	$25	$18	$10	$24	$21	$16	$23	$39
Recreation	$2	$1	$3	$2	$2	$2	$2	$3	$2	$14
TOTAL	$177	$174	$227	$156	$68	$176	$216	$92	$222	$314

*Lodging average considers only visitors who spent at least one night in the region.

Trip activity spending per party per day

Lodging and dining accounted for the majority of respondents' reported spending. Respondents who stayed at least one night in the region spent the most on average on lodging – between $65 and $96 per party per day. Respondents across all regions (both overnight and day trippers) also spent a significant amount on dining – between $45 and $90 per party per day.

In the Rogue and Umpqua Valleys, many respondents (more than one third and often significantly more) spent no money in any spending category. The only exception was non-locals, at least three-quarters of whom spent money on dining. The Columbia Gorge had lower proportions of non-spenders in all categories compared to other regions (though one-fifth or more still spent no money in each category).

As might be expected, non-locals in all regions outspent locals in all categories (with the exception of Rogue Valley locals who spent slightly more on lodging than non-locals). Similarly, a higher proportion of non-locals spent some money in each spending category than locals with a few exceptions:

- More Rogue Valley locals spent money on lodging than non-locals, suggesting that the Rogue Valley might want to focus on capturing more paid lodging visitors from farther away.
- More Columbia Gorge locals spent money on dining and recreation than non-locals, suggesting that the Columbia Gorge might want to focus more attention on extending the stays and activities out-of-towners.

For Comparison

Willamette Valley respondents outspent Rogue Valley, Umpqua Valley, and Columbia Gorge respondents in every category, spending about $100-$200 more per party per day on average than respondents in other regions. These differences could be explained by a variety of factors including the higher prices present in the Willamette Valley or survey administration differences.

Percentage of respondents who spent at least some money in the following categories:

	Rogue All	Rogue Local	Rogue Non-Local	Umpqua All	Umpqua Local	Umpqua Non-Local	Gorge All	Gorge Local	Gorge Non-Local
Lodging*	57%	62%**	56%	52%	-	54%	70%	-	70%
Dining	62%	55%	84%	63%	49%	74%	80%	67%	56%
Shopping	28%	22%	49%	25%	20%	29%	32%	24%	34%
Transportation	46%	38%	70%	51%	34%	64%	63%	56%	65%
Recreation	9%	7%	15%	10%	9%	11%	14%	14%	13%

* Lodging average considers only visitors who spent at least one night in the region away from their home.

**Rogue locals who spent on lodging were likely on overnight trips away from their home, but still within in the region (for example, away from home in Ashland, staying in the Applegate Valley).

Please tell us approximately how much your party spent in winery tasting rooms exclusively in the region per day during your trip. *Spending figures below represent rounded averages per party per day.*

	Rogue			Umpqua			Gorge			Willamette
	All	Local	Non-Local	All	Local	Non-Local	All	Local	Non-Local	
Wine tasting	$12	$11	$15	$8	$8	$9	$18	$16	$19	$35
Wine	$96	$87	$124	$142	$118	$160	$121	$108	$125	$249
TOTAL	$107	$98	$139	$151	$125	$169	$139	$125	$143	$284

Percentage of respondents who spent at least some money on wine tasting or wine:

	Rogue All	Rogue Local	Rogue Non-Local	Umpqua All	Umpqua Local	Umpqua Non-Local	Gorge All	Gorge Local	Gorge Non-Local
Wine Tasting	39%	36%	49%	29%	25%	31%	55%	52%	55%
Wine	82%	81%	84%	89%	82%	94%	85%	87%	85%

Wine & wine tasting spending per party per day

Columbia Gorge respondents spent the most on average on tasting fees while Umpqua Valley respondents spent the most on average on purchasing wine. Conversely, Umpqua Valley respondents spent the least on average on tasting fees. Rogue Valley respondents spent the least on average on purchasing wine.

In all regions, locals spent less than non-locals on both tastings and wine. This difference is particularly pronounced for wine purchasing – locals spent between $16 and $42 less than non-locals.

A high proportion of respondents (almost half or more) in all regions did not spend anything on wine tasting. This could be partially explained by the common practice of waiving tasting fees for visitors who purchase wine and for visitors who are wine club members. The percentage of both local and non-local respondents who reported no spending on tastings is higher in the Rogue and Umpqua Valleys compared to the Columbia Gorge.

Considerably more respondents purchased wine than paid for tastings – between 80% and 90% of all respondents reported some spending on wine compared to the 25% to 55% who reported some spending on wine tasting.

For Comparison

Willamette Valley respondents outspent Rogue Valley, Umpqua Valley, and Columbia Gorge respondents on both wine purchases and tastings – by about $100-$150 for wine and $15-$25 for tastings. As with trip activity spending, these differences could be explained by a variety of factors including higher prices in the Willamette Valley or survey administration differences. Since the average Willamette Valley respondent purchased the same number or fewer bottles than most respondents in the other three regions, volume of purchases cannot explain these spending differences.

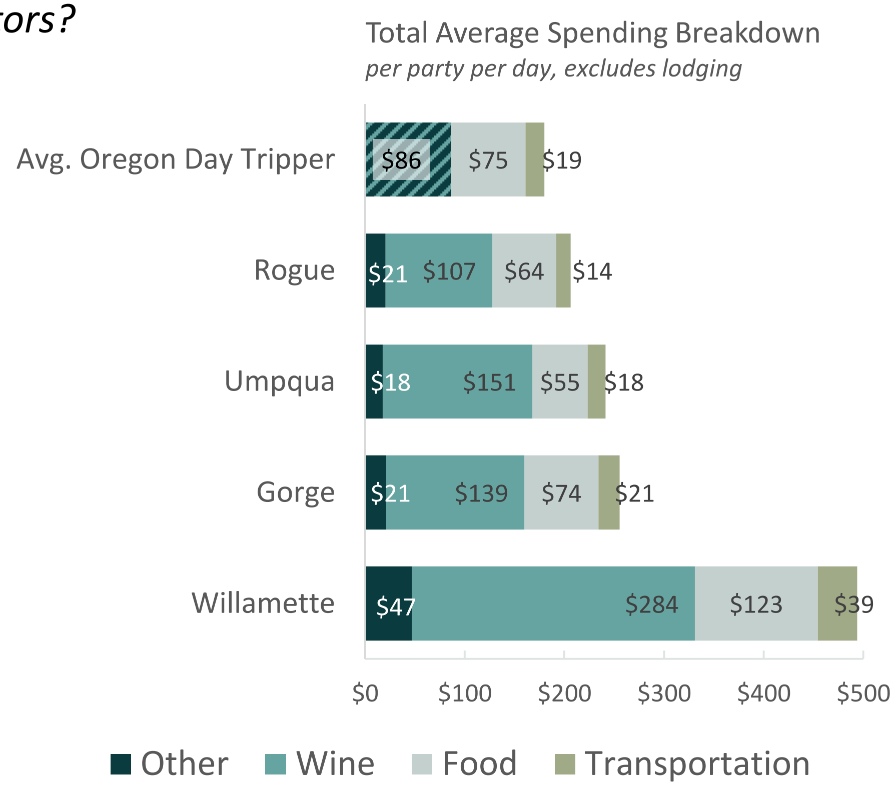
How do winery visitors compare to general Oregon visitors?

Based on survey responses, we see that winery visitors, particularly Willamette Valley winery visitors, spend more on average than the average Oregon day-tripping* visitor.

Much of this spending difference comes from spending winery visitors put towards wine purchases. Excluding wine purchases, Rogue Valley, Umpqua Valley, and Columbia Gorge respondents have a spending profile that more closely matches the average Oregon day tripper. Willamette Valley respondents, who reported spending much more on dining and wine purchases than other regions' respondents, would still outspend the average Oregon day tripper if wine purchases were excluded.

It is perhaps unsurprising that winery visitors spend more than the general Oregon visitor given household income differences. While only about one-third of Oregon's overnight visitors had a household income of $75K or more, about two-thirds of winery survey respondents reported earning $80K or more.

*Overnight visitor spending breakdown is not available for the average Oregon visitor, so our comparison excludes spending on lodging.



		Rogue All	Rogue Local	Rogue Non-Local	Umpqua All	Umpqua Local	Umpqua Non-Local	Gorge All	Gorge Local	Gorge Non-Local	Willamette Valley	Avg. OR Day Tripper
Total average spending per **party** per day	*Lodging*	$79	$92	$77	$65	-	$68	$99	-	$97	$105	
	Everything else	$206	$180	$289	$241	$193	$277	$256	$216	$268	$494	$180
Total average spending per **person** per day	*Lodging*	$23	$25	$23	$22	-	$24	$30	-	$30	$45	
	Everything else	$59	$50	$87	$80	$60	$96	$78	$58	$83	$215	$67
Average party size		*3.5*	*3.6*	*3.3*	*3.0*	*3.2*	*2.9*	*3.3*	*3.7*	*3.2*	*2.3*	*2.7*

GENERAL REGIONAL PERCEPTIONS

This section includes information about how respondents who did not live in the region perceived the region. It covers the following topics:

- **Satisfaction with Regional Qualities** – How satisfied were visitors with qualities like scenic beauty, ease of travel, affordability, and availability of activities?
- **Likelihood of Returning to the Region –** How likely were visitors to return for another trip in the future?
- **Region-Specific Barriers and Opportunities –** What factors prevent visitors from coming to the region or coming more often? What do visitors like about the region that could be capitalized on to attract more visitors?

We can draw several conclusions about how respondents visiting the regions perceived them:

- Respondents were overwhelmingly satisfied with various qualities of each wine region. In particular, 97% of respondents or more said they were satisfied with each region's scenic beauty.
- Respondents were least satisfied with retail shopping, availability of high quality local cuisine/restaurants, and opportunities to view or experience local arts, culture, and history (although over half of respondents still expressed satisfaction with all three of these attributes).
- At least 98% of respondents in all three regions said they were either likely or very likely to return to the region again.
- **Rogue Barriers:** Negative wildfire/smoke effects and the region's distance from major metro areas
- **Rogue Opportunities:** Cross-market the region's wine and regional events
- **Umpqua Barriers:** Lack of accommodations and food options and difficulty of getting around the region
- **Umpqua Opportunities:** Offer more wine tours
- **Gorge Barriers:** Difficulty of getting to wineries and negative wildfire/smoke effects
- **Gorge Opportunities:** Offer wine shuttles and other creative transportation options

How satisfied or dissatisfied were you with each of these qualities of the region during your trip?

Characteristics with highest satisfaction

Respondents rated their satisfaction with 11 regional qualities. The respondents were far more satisfied than dissatisfied with all 11 of these qualities, though some qualities rose to the top in satisfaction ratings and some received higher levels of neutral or dissatisfied ratings.

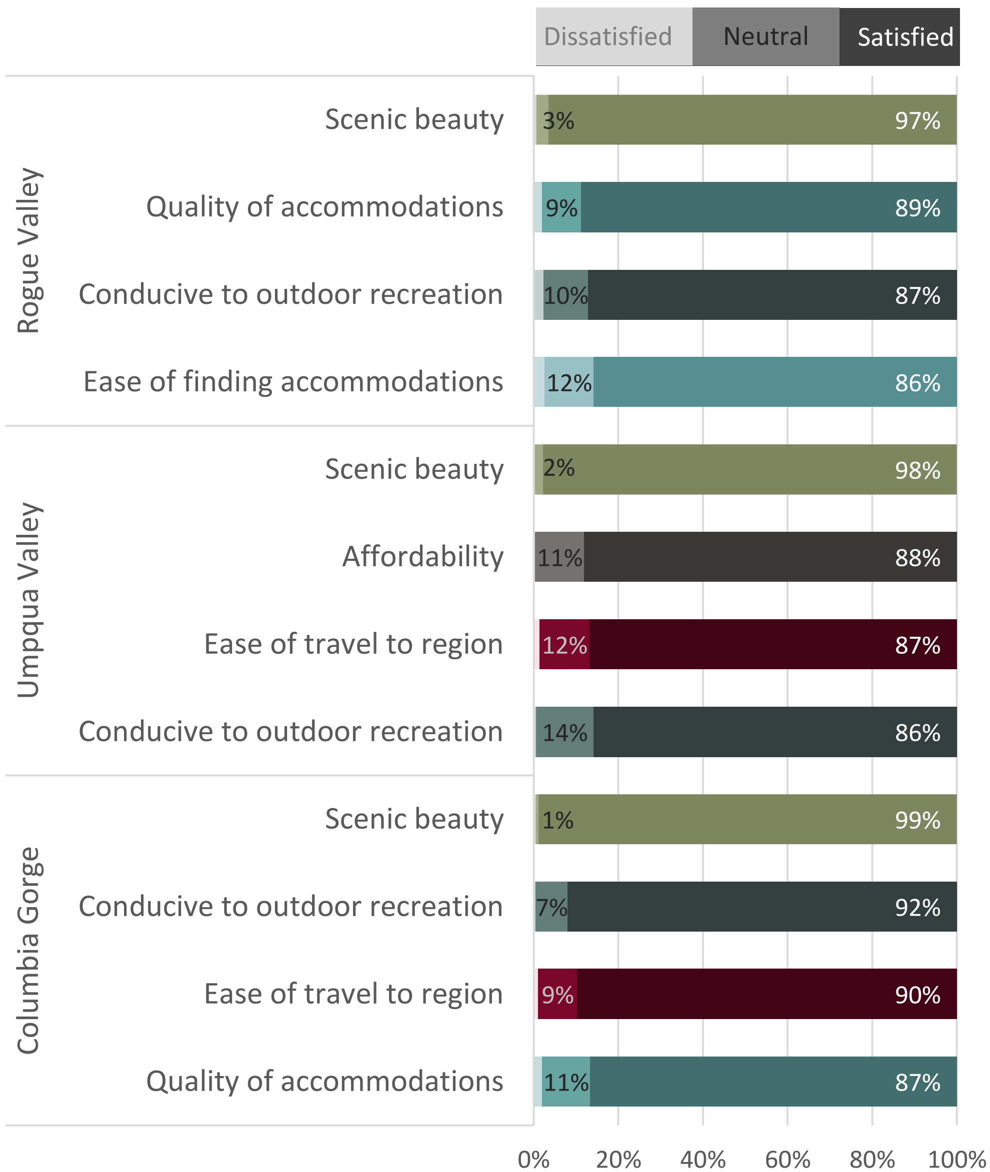
In all three regions, the highest percentage of respondents (97% or more) said they were satisfied with the region's scenic beauty.

After scenic beauty, qualities that received the highest satisfaction ratings diverged between regions. In all three regions, however, having a terrain, geography, or climate conducive to outdoor recreation ranked somewhere in the top four regional qualities.

In the Rogue Valley and Columbia Gorge, a high proportion (almost 90%) of respondents indicated satisfaction with the quality of accommodations in the region. Eighty-three percent of Umpqua Valley respondents said they were satisfied with quality of accommodations.

In the Umpqua Valley and Columbia Gorge, about 90% of respondents indicated satisfaction with ease of traveling to the region from their home (or other starting point). Eighty-five percent of Rogue Valley respondents indicated satisfaction with ease of travel.

Two other characteristics floated to the top for one region more than others. In the Rogue Valley, respondents were particularly satisfied with ease of finding accommodations, and in the Umpqua Valley, respondents were particularly satisfied with affordability.



How satisfied or dissatisfied were you with each of these qualities of the region during your trip?

Characteristics with lowest satisfaction

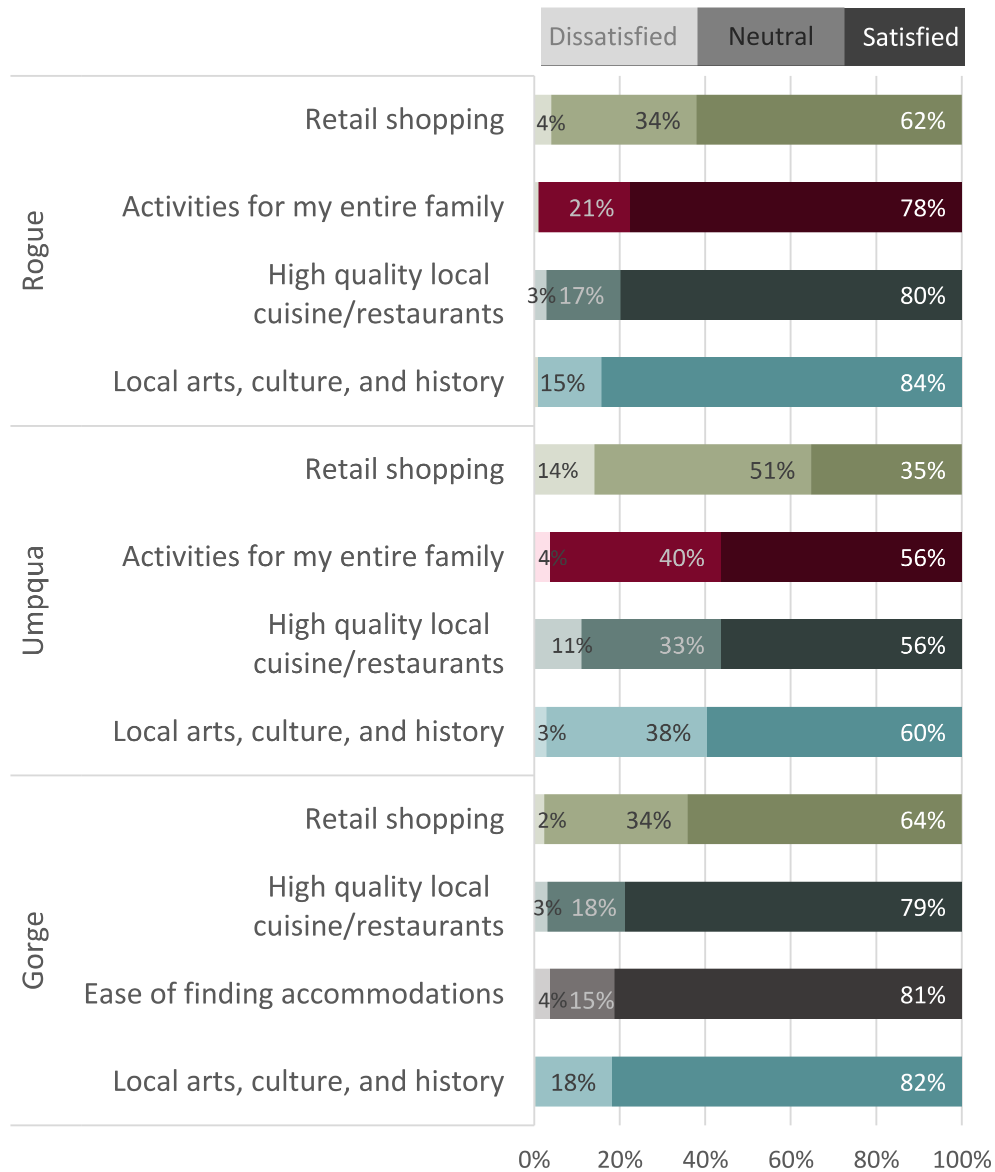
Even for regional qualities with the lowest proportions of respondents indicating satisfaction, only about 3%-4% of respondents actually indicated dissatisfaction. Respondents' perceptions therefore only give a suggestion of qualities that are less strong than others, not necessarily qualities that are disappointing to visitors.

That said, it appears that across all three regions the following are not seen as the region's strongest points:

- Retail shopping
- High quality local cuisine/restaurants
- Opportunities to view or experience local arts, culture, and history

In the Rogue and Umpqua Valleys, survey responses also indicated that availability of activities for the entire family is also not seen as a top strength. In the Columbia Gorge, ease of finding accommodation is not seen as a top strength.

Across all three regions, the smallest proportion of respondents were satisfied with retail shopping opportunities. In the Rogue Valley and Columbia Gorge, about two-thirds of respondents were satisfied with shopping and most of the remainder felt neutral. In the Umpqua Valley, however, 14% of respondents reported dissatisfaction with shopping – the highest dissatisfied percentage of any category in any region. This suggests that the Umpqua Valley (and other regions) should evaluate shopping opportunities for relevance and accessibility to visitors.

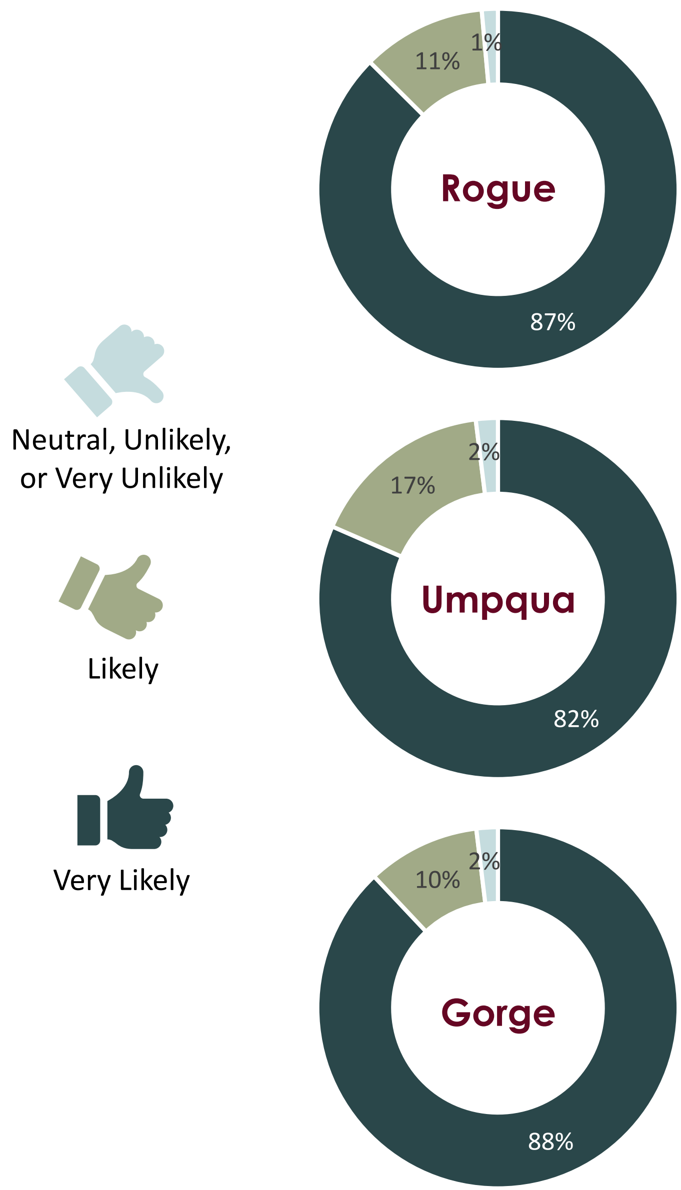


How likely or unlikely are you to visit the region again in the future?

We asked respondents who did not live in the region to indicate how likely they were to return for a visit in the future. Respondents overwhelmingly said they were very likely to visit the region again. In fact, at least 98% of respondents in every region said they were either likely or very likely to return.

This suggests that those who have visited a region at least once had positive enough experiences that they felt the trip was worth taking again.

There was little variation between regions in respondents' enthusiasm. Only Umpqua Valley respondents seemed slightly less certain of their likelihood of returning. Here, 82%, rather than 87% or 88%, said they were very likely to return.



GENERAL REGIONAL PERCEPTIONS

ROGUE VALLEY BARRIERS & OPPORTUNITIES

Photo courtesy of Travel Oregon, https://traveloregon.com/things-to-do/events/culinary-events/pedal-and-sip-in-the-applegate-valley/

What factors have prevented you from visiting the Rogue Valley?

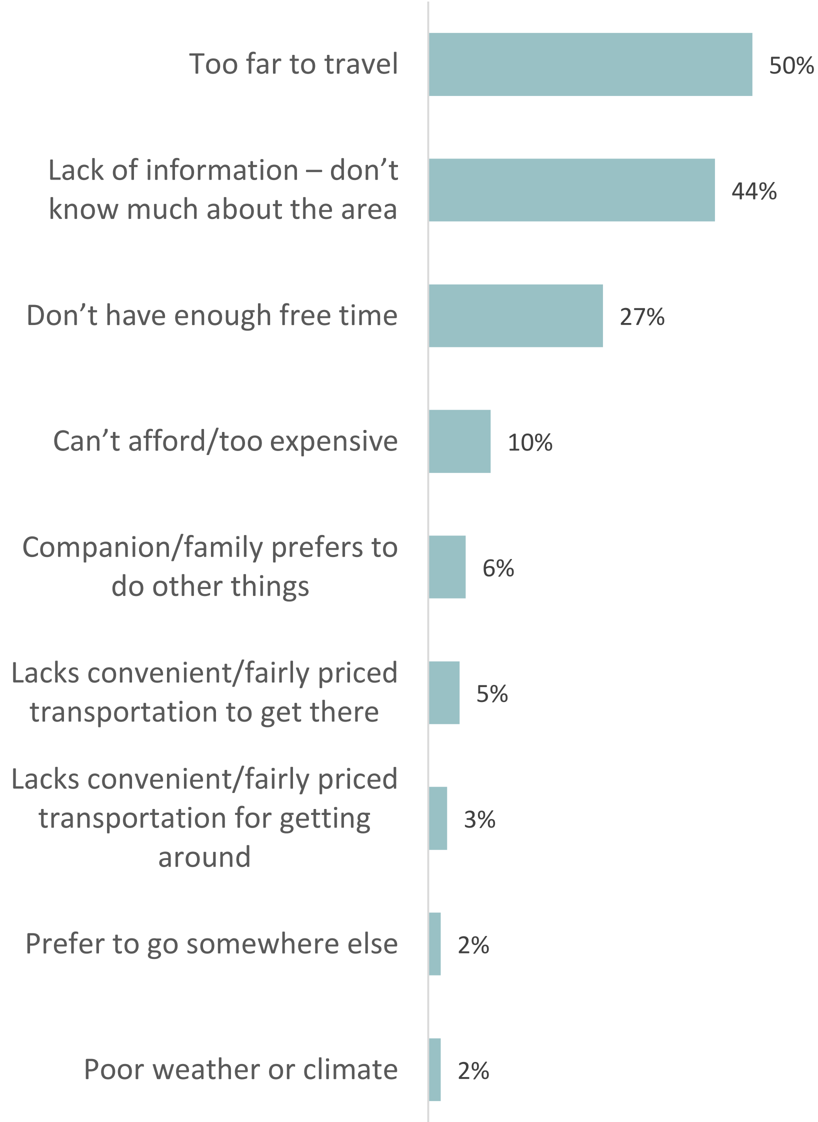
We asked respondents who said they had not visited the Rogue Valley before to select factors that had prevented them from visiting. The three reasons cited by the highest proportion of respondents were:

- The Rogue Valley was too far away for respondents to travel
- Respondents didn't know much about the area
- Respondents didn't have enough free time

While distance and lack of free time are beyond the control of regional promoters, respondents lack of familiarity with the area could be addressed. Among potential wine tourists, the Rogue Valley is likely less well-known than the Willamette Valley. The region is already in the process of working to elevate the region's brand. These efforts might help reach more potential visitors who had never before considered the region as a wine destination.

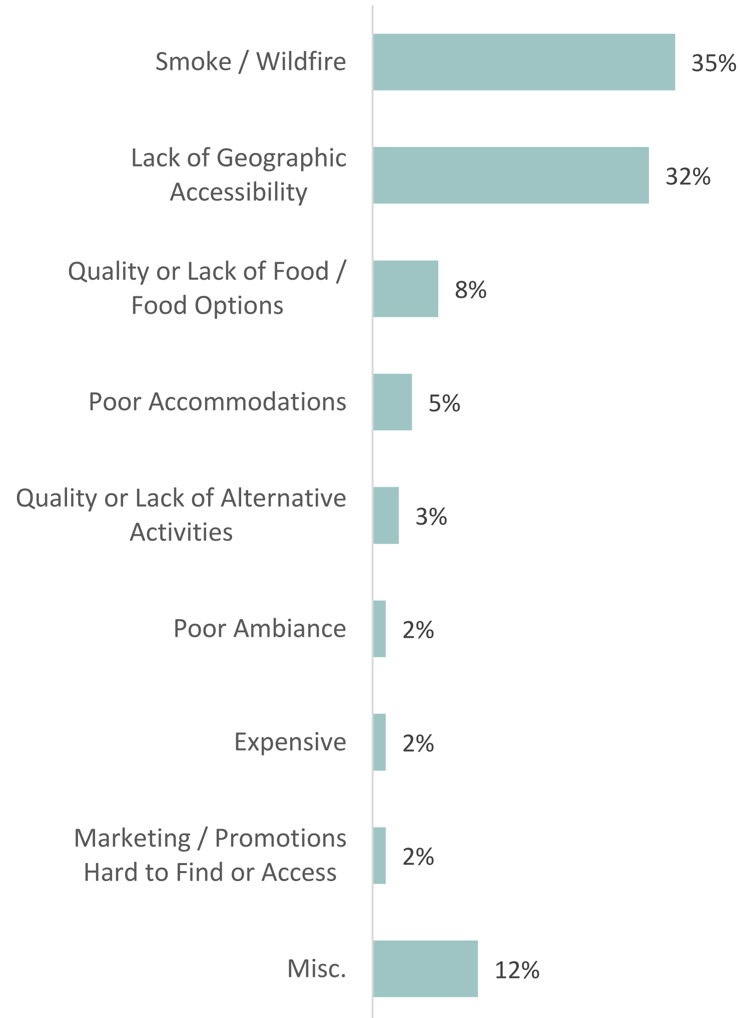
Interestingly, very few respondents cited affordability as an issue. Compared to some of the most popular West Coast wine regions, affordability is an advantage of the Rogue Valley, Umpqua Valley, and Columbia Gorge.

Note: *Only 104 people provided comments about barriers, making the sample size considerably smaller than most of the other results presented in this report.*



Do you have any other suggestions or comments about your experience in the Rogue Valley?

Critical comments provided by respondents



The highest percentage of respondents who commented on barriers mentioned smoke and wildfires. This survey captured the responses from many people who visited the Rogue Valley during the particularly smoky 2018 summer season, so it is unsurprising that so many respondents would comment on the unpleasantness of wildfires.

The second highest percentage of respondents commented on the difficulty of traveling to the Rogue Valley because of its distance from major metropolitan areas. As one respondent commented, "the main barrier we find is distance from Portland makes for extra planning." The respondent went on to suggest that "frequent, zippy rail service to Medford or Ashland would get us there much more often, coupled with a car rental."

As a remedy to distance, one respondent suggested creating a tasting room presence in the Willamette Valley: "Maybe more Southern wineries could pull together a tasting room in the Yamhill/Dundee region which gets TONS of traffic. There are plenty of people who are bored with Pinot Noirs and love the bold reds of Southern Oregon. Better hurry because the Walla Walla wineries have figured this out too and we have noticed lots of them opening tasting rooms up here."

Smaller percentages of respondents commented on the lack of availability and variety of food and the quality and lack of availability of accommodations in the region.

***Note:** Only 65 people provided critical comments, making the sample size considerably smaller than most of the other results presented in this report.*

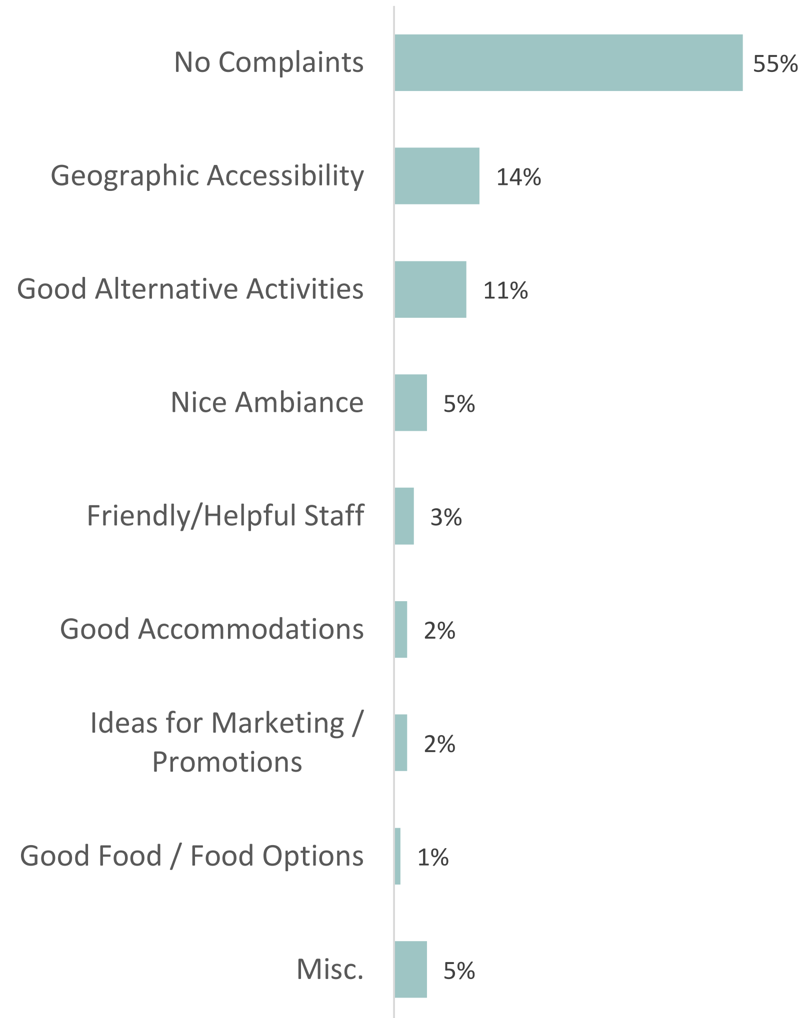
Do you have any other suggestions or comments about your experience in the Rogue Valley?

Positive comments and opportunities for improvement provided by respondents

The highest percentage of respondents who provided positive comments about the Rogue Valley said there wasn't anything they'd suggest to improve the Rogue Valley experience. In fact, one respondent commented that they "like the Rogue Valley so much we bought a house and are moving there in about a month!"

Contrary to comments about geographic inaccessibility, several respondents offered positive feedback about the ease of accessing the Rogue Valley. As one respondent shared, "We live in Eureka, CA and heading up to the Rogue Valley area for wine tasting is much more affordable and pleasurable than heading down to the Napa/Sonoma area. The drive is easy, the accommodations and restaurants in the area are great…We will continue to visit this are as often as we can."

Several respondents also mentioned the other activities available in the Rogue Valley, like the Oregon Shakespeare Festival. Some suggested that wineries should take greater advantage of these activities as a venue for promoting the region's wine – what would it look like if wineries formed partnerships with the Oregon Shakespeare Festival and other events to cross-market wine and entertainment opportunities?



***Note:** Only 96 people provided positive comments, making the sample size considerably smaller than most of the other results presented in this report.*

GENERAL REGIONAL PERCEPTIONS

UMPQUA VALLEY BARRIERS & OPPORTUNITIES

Photo courtesy of Travel Southern Oregon, https://www.southernoregon.org/sip-the-day-away-on-the-umpqua-valley-wine-trail/

What factors have prevented you from visiting the Umpqua Valley?

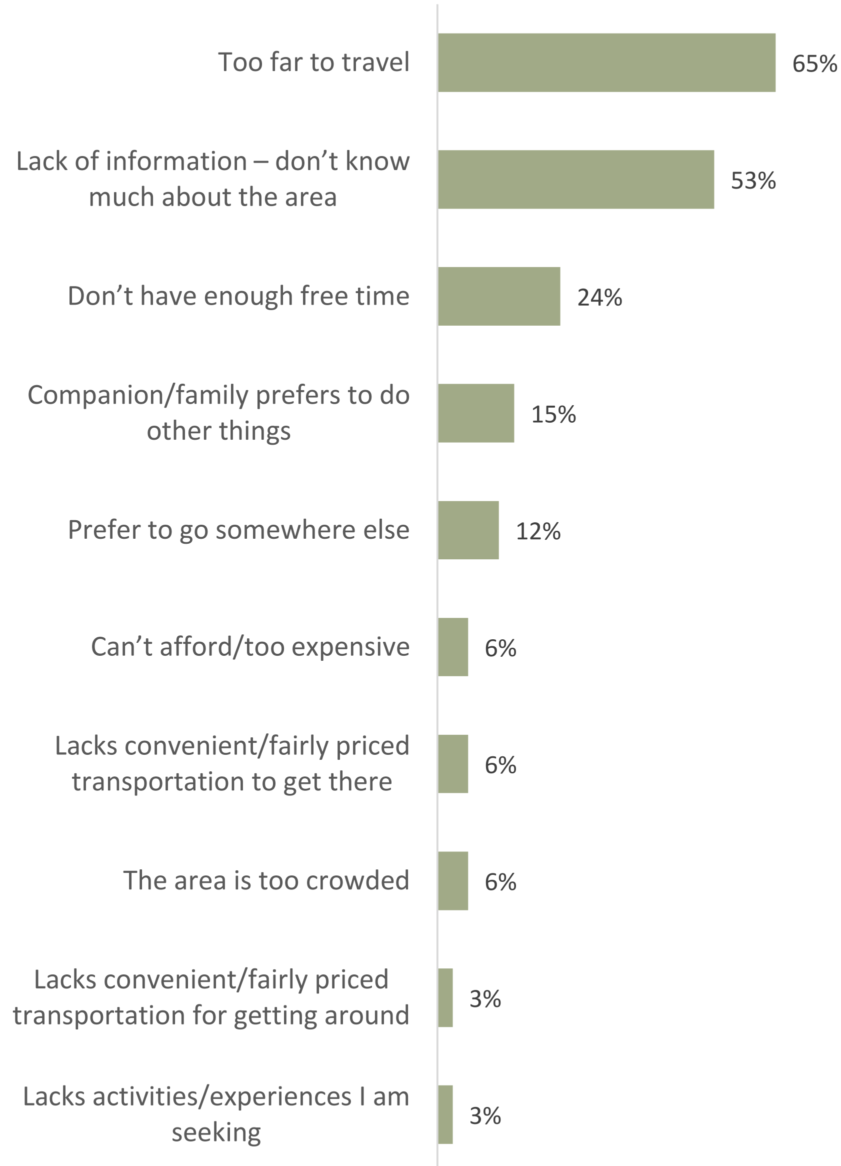
We asked respondents who said they had not visited the Umpqua Valley before to select factors that had prevented them from visiting. The three reasons sited by the highest proportion of respondents were:

- The Umpqua Valley was too far away for respondents to travel
- Respondents didn't know much about the area
- Respondents didn't have enough free time

While distance and lack of free time are beyond the control of regional promoters, respondents lack of familiarity with the area could be addressed. Among potential wine tourists, the Umpqua Valley is likely less well-known than the Willamette Valley. Regional travel and wine industry professionals might consider a more concerted effort to increase recognition of the Umpqua Valley brand.

Interestingly, very few respondents cited affordability as an issue. Compared to some of the most popular West Coast wine regions, affordability is an advantage of the Rogue Valley, Umpqua Valley, and Gorge.

Note: *Only 34 people responded to this question, so note that the sample size is considerably smaller than most of the other results presented in this report.*



Do you have any other suggestions or comments about your experience in the Umpqua Valley?

Critical comments provided by respondents

Many respondents who commented on barriers mentioned challenges related to accommodation and food options. As one respondent stated, “Roseburg lacks basic amenities, lodging, food, etc. that pair with good wine regions.” On a similar note, another respondent commented, “The area is in much need of better overnight or multi-day accommodations. B&B's are especially lacking. We've visited the Umpqua many times and have always found quality accommodations hard to find. The few there were usually booked. Up-scale restaurants seem to be non-existent or hard to get to.”

Other respondents commented on the difficulty of getting to and getting around the Umpqua Valley. As the Umpqua Valley is far from a major airport, it can be more difficult for visitors to access. One respondent specifically commented on the transportation options available to get visitors to wineries: “There are no Uber or Lyft drivers in Roseburg at this time and very, very limited taxis - the distance to the wineries would make a taxi very, very expensive.”

Another respondent explained the difficulty of attracting visitors to the Umpqua Valley: “It is hard to convince friends from other parts of the state or country to visit as they don't have the opportunity to try UV wines…This, combined with the amateur-looking publicity materials (billboards and maps and ads), makes convincing outsiders to "take a risk" to come down this way a challenge. And those are the people I know!”

***Note:** Only 42 people provided critical comments, making the sample size considerably smaller than most of the other results presented in this report.*

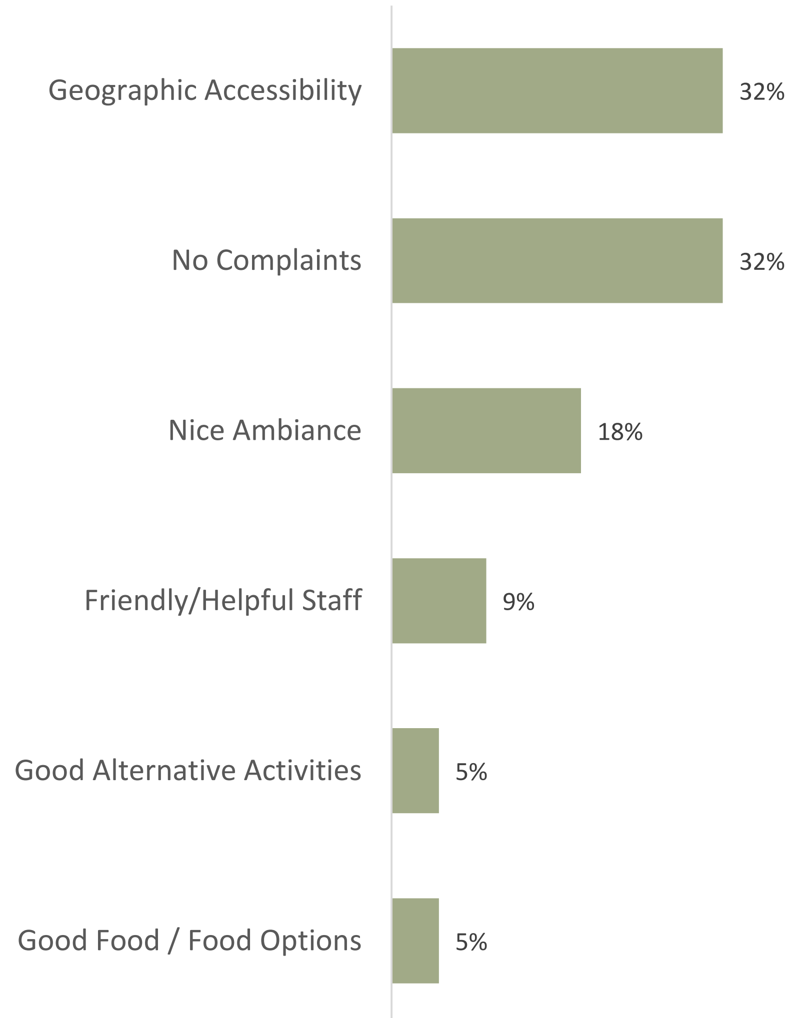
Do you have any other suggestions or comments about your experience in the Umpqua Valley?

Positive comments and opportunities for improvement provided by respondents

Contrary to respondents who complained about accessibility, many respondents offered positive feedback on accessibility in the Umpqua Valley. As one respondent stated, "Everyone was nice and helpful that we encountered. Variety of wines was good (something for every palate). Wineries were all close enough together and easily accessible. We have been several times and will come again."

In addition to liking accessibility in the Umpqua Valley and commenting on a generally positive experience, respondents also brought up the beauty and enjoyable atmosphere of the region and positive interactions with staff.

As far as suggestions for improving visitors' experience in the Umpqua Valley, respondents suggested building out more tour options – "Have wine tours more often. Make the tours less expensive." Some respondents also suggested developing more downtown tasting room options to create more accessible tasting opportunities.



Note: *Only 22 people provided positive comments, making the sample size considerably smaller than most of the other results presented in this report.*

GENERAL REGIONAL PERCEPTIONS

COLUMBIA GORGE BARRIERS & OPPORTUNITIES

What factors have prevented you from visiting the Columbia Gorge?

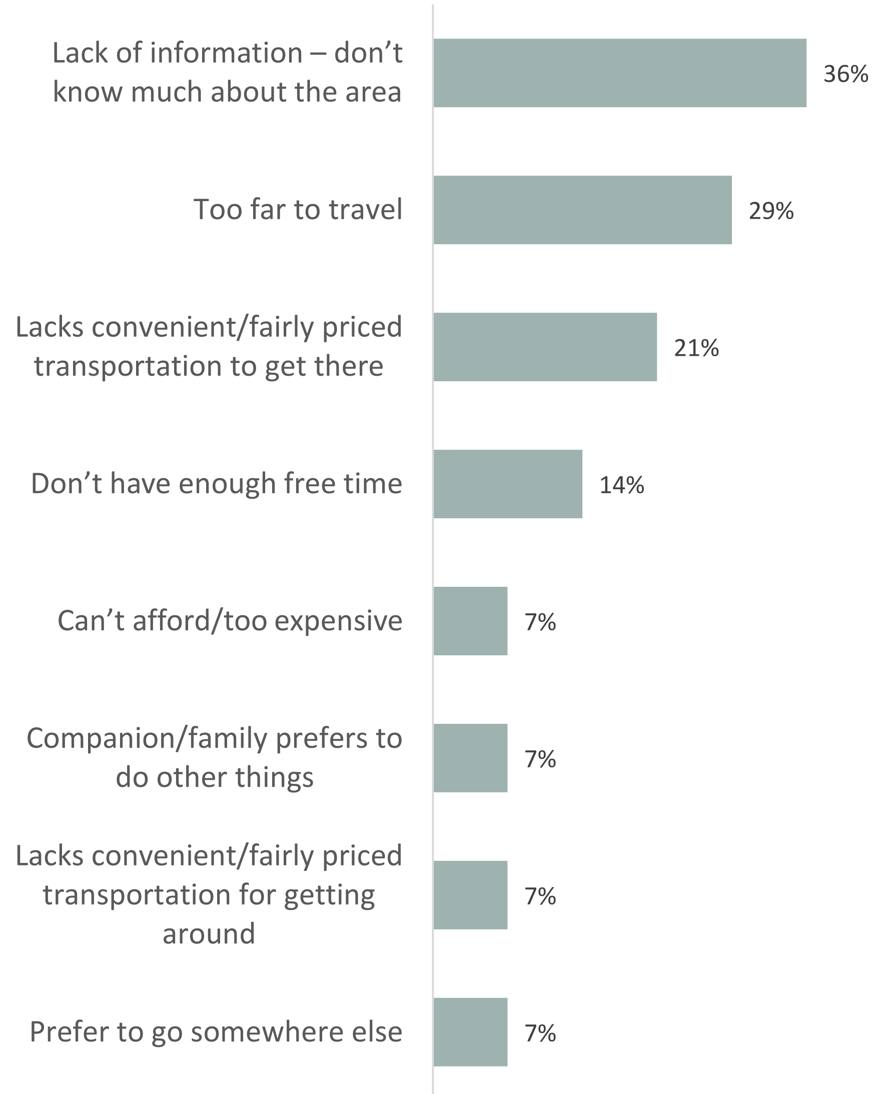
We asked respondents who said they had not visited the Columbia Gorge before to select factors that had prevented them from visiting. The three reasons cited by the highest proportion of respondents were:

- Respondents didn't know much about the area
- The Columbia Gorge was too far away for respondents to travel
- Respondents thought there wasn't convenient or fairly priced transportation to get to the Columbia Gorge

While distance is beyond the control of regional promoters, respondents' lack of familiarity with the area and perception of limited transportation options could be addressed. Among potential wine tourists, the Columbia Gorge is likely less well-known than the Willamette Valley. Regional travel and wine industry professionals might consider a more concerted effort to increase recognition of the Columbia Gorge brand. Likewise, travel and wine industry professionals should work together to investigate and, if necessary, address transportation issues.

Interestingly, very few respondents cited affordability as an issue. Compared to some of the most popular West Coast wine regions, affordability is an advantage of the Rogue Valley, Umpqua Valley, and Columbia Gorge.

Note: *Only 14 people responded to this question, so note that the sample size is considerably smaller than most of the other results presented in this report.*



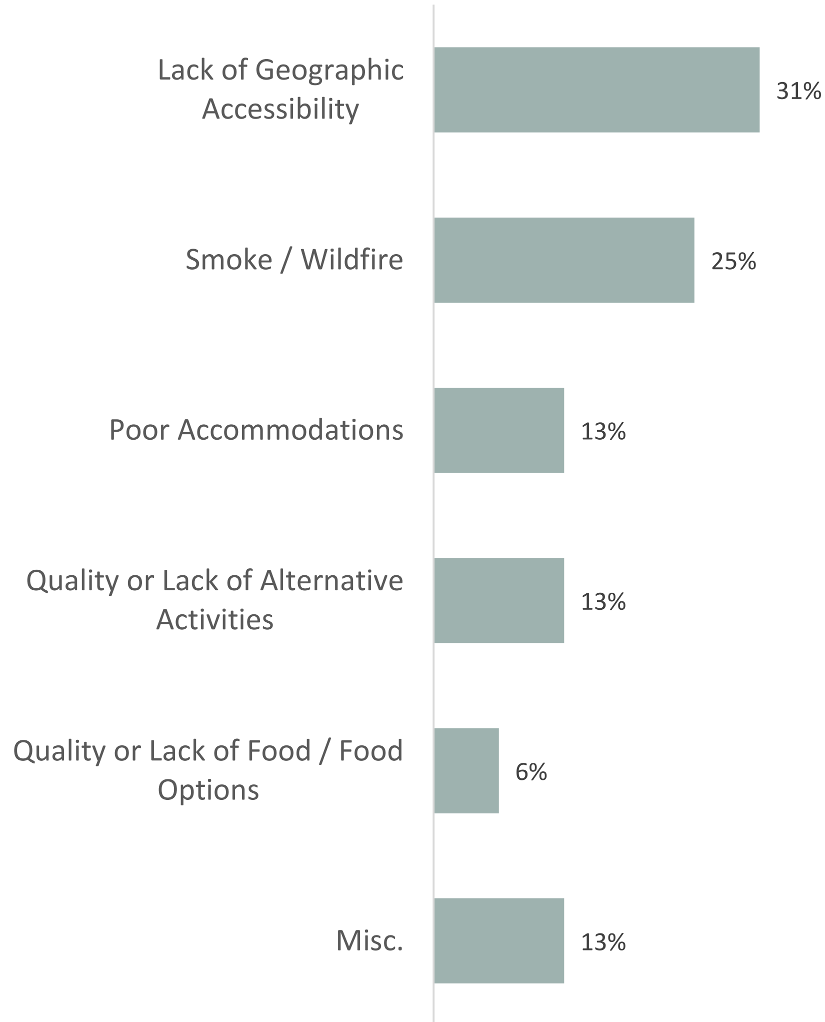
Do you have any other suggestions or comments about your experience in the Columbia Gorge?

Critical comments provided by respondents

The highest percentage of Columbia Gorge respondents commented on challenges related to geographic accessibility. One respondent suggested, "I'd like to see the wineries or a winery association organize different tours because we found it difficult even with Google maps to find some of the wineries. You can get lost in the Red Hills but we've been going there so often that we've figured out where everyone is located. It takes much more planning to go to the Gorge!"

Another respondent combined fears about distance with concerns about food options: "Some wineries are a distance to travel so that drinking and driving is a concern. Many have limited food choices and those choices can be expensive and not filling enough when drinking."

The second highest percentage of respondents who commented on barriers mentioned smoke and wildfires. This survey captured the responses from many people who visited the Columbia Gorge during the particularly smoky 2018 summer season, so it is unsurprising that so many respondents would comment on the unpleasantness of wildfires.



Note: *Only 16 people provided critical comments, making the sample size considerably smaller than most of the other results presented in this report.*

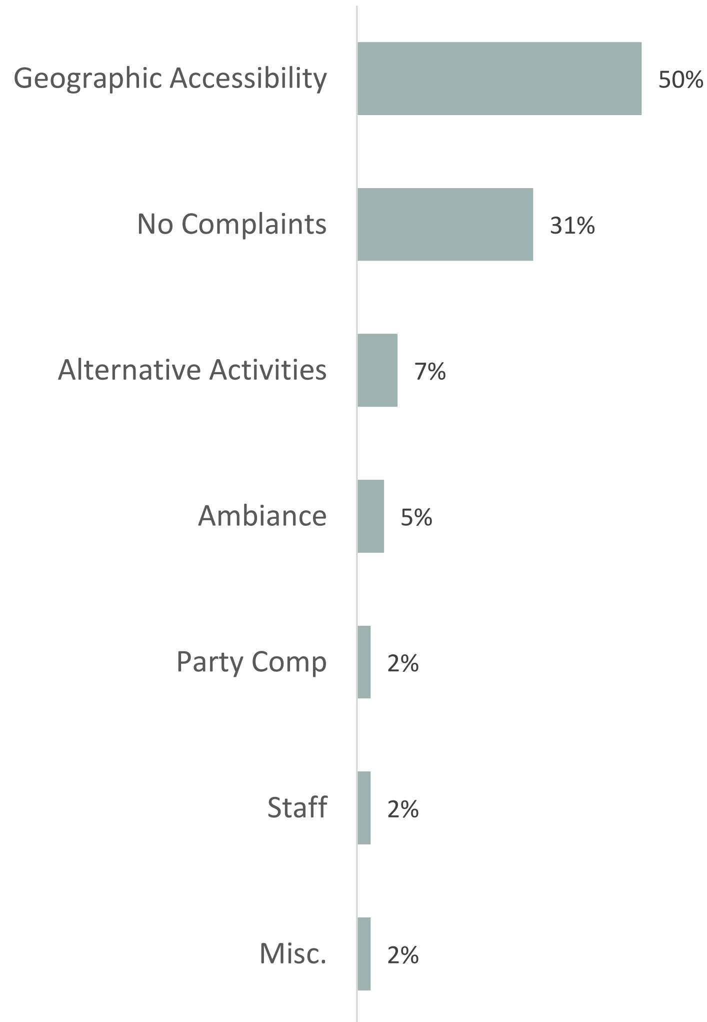
Do you have any other suggestions or comments about your experience in the Columbia Gorge?

Positive comments and opportunities for improvement provided by respondents

Many respondents praised the Columbia Gorge as a generally wonderful location to visit. One respondent wrote that "keeping the Gorge unpretentious, affordable, engaging and relaxed makes it a great destination. And the wines make everything perfect. If folks don't go home with a case of wine, they didn't come with a open palate. So unique and wonderful. Only grown in the Gorge."

Contrary to comments offered by some respondents about geographic inaccessibility, many more respondents shared that they loved the Columbia Gorge's close proximity to the Portland Metro area, making it an easy destination for a quick getaway.

As an opportunity to alleviate some of the travel distance between wineries in the Columbia Gorge, several respondents suggested interesting transportation opportunities. One respondent suggested that "having bike routes stringing together wineries (and accommodations) which are safe to travel [to] would be highly desirable." Another commented that "it would be awesome if there was a hop on hop off shuttle that took you to wineries around the area…Visitors could leave from Hood River and the shuttle could leave from certain wineries at certain times, maybe like every hour. You could buy a full day pass or pay per ride. I think this would be a fun way to visit more wineries without having to worry about drinking and driving."



Note: *Only 42 people provided positive comments, making the sample size considerably smaller than most of the other results presented in this report.*

WINE-SPECIFIC REGIONAL PERCEPTIONS

This section includes information about respondents' perceptions of wine and wineries in the Rogue Valley, Umpqua Valley, and Columbia Gorge. It covers the following topics:

- **Satisfaction with Regional Wine Qualities** – How satisfied were visitors with the region as a wine destination and with various qualities of wineries (including quality and value of wine, facility accessibility and setting, and friendliness/hospitality of the winery staff)?
- **Regional Comparisons –** How do respondents rate the quality of the region's wine compared to other regions' wine?
- **Regional Associations** – What wine attributes (like value, quality, and prestige) do respondents associate with the region compared to other regions? What wine varieties do respondents associate with the region?
- **Barriers and Strengths –** What factors prevent visitors from going to wineries in the region or from coming more often? What do visitors like or dislike about the region's wineries? Where are opportunities for improvements?

For this portion of the report, we separate the findings into three region-specific sections. Each region's section covers the topics above based on the feedback provided by respondents to that region.

Rather than providing local versus non-local breakdowns, we sometimes compare **high-frequency, high-end (HFHE)** respondents to non-HFHE respondents. HFHE respondents are those that say they drink wine at least a few times a week (high-frequency) and buy wine costing $20 or more at least monthly (high-end).

We provide key takeaways for each of these topics at the beginning of each region's section.

WINE-SPECIFIC REGIONAL PERCEPTIONS

ROGUE VALLEY

Key Takeaways from Rogue Valley Respondents

Satisfaction with Regional Wine Qualities

- Respondents thought very highly of the Rogue Valley as a wine-tasting destination – a higher percentage of respondents rated it as excellent or one of the best than any other region.
- Respondents were particularly satisfied with the ease of travel to wineries, the natural beauty of the winery settings, and the hospitality of winery staff.

Regional Comparisons

- Respondents held wines from the Rogue Valley, Napa Valley, and Willamette Valley in particularly high regard.

Regional Associations

- Respondents associated the Rogue Valley with producing a wide variety of wines, having many small artisan producers, and offering wines that are a good value for the money.
- Respondents associated the Rogue Valley with tempranillo, red blends, Viognier, cabernet sauvignon, and pinot gris/pinot grigio.

Barriers

- The largest proportions of respondents cited distance and lack of free time as barriers to visiting wineries or visiting more frequently.
- The next largest proportion of respondents cited lack of information as a barrier.

Strengths & Opportunities

- Respondents praised the Rogue Valley's wine quality, friendly staff, and tasting room ambiance.
- Many respondents wanted the Rogue Valley to maintain the region's accessible, welcoming feel and not become over-run and pricey like some California wine regions.
- Some respondents suggested Rogue Valley wineries develop more special events, activities, and promotional materials (like wine trail maps) to help elevate the region's offerings to both locals and visitors.

Photo courtesy of Travel Oregon, https://traveloregon.com/things-to-do/events/culinary-events/pedal-and-sip-in-the-applegate-valley/

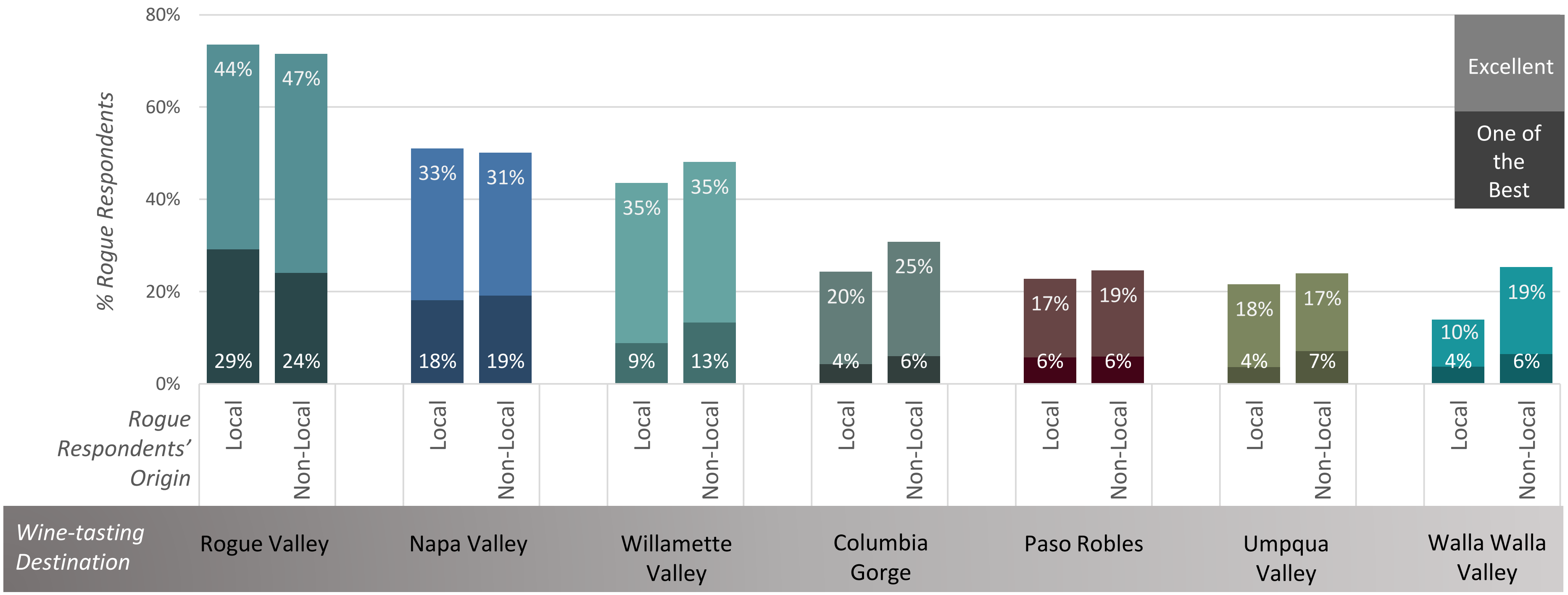
How would you rate the following regions as a leisure travel/vacation/getaway destination for wine tasting?

Percentage of respondents rating destination quality as "one of the best" or "excellent"

Rogue Valley respondents (both local and non-local) regarded the Rogue Valley as a high quality wine-tasting destination. Respondents could rate each wine-tasting destination as one of the best, excellent, good, average, poor quality, or undecided/not familiar with the region. Compared to other regions, the highest proportion of respondents (about three-quarters) rated the Rogue Valley as one of the best or excellent.

With the exception of the Rogue and Napa Valleys, non-local respondents thought more highly of other regions as wine-tasting destinations than locals. Non-locals were also generally more familiar with other regions than locals. With the exception of the Rogue and Umpqua Valleys, a greater proportion of non-locals than locals had sufficient familiarity with other regions to rate them.

Interestingly, Umpqua Valley and Columbia Gorge respondents ranked the Rogue Valley lower than Rogue respondents (in 4th place or lower). *See pages 83 and 92.*



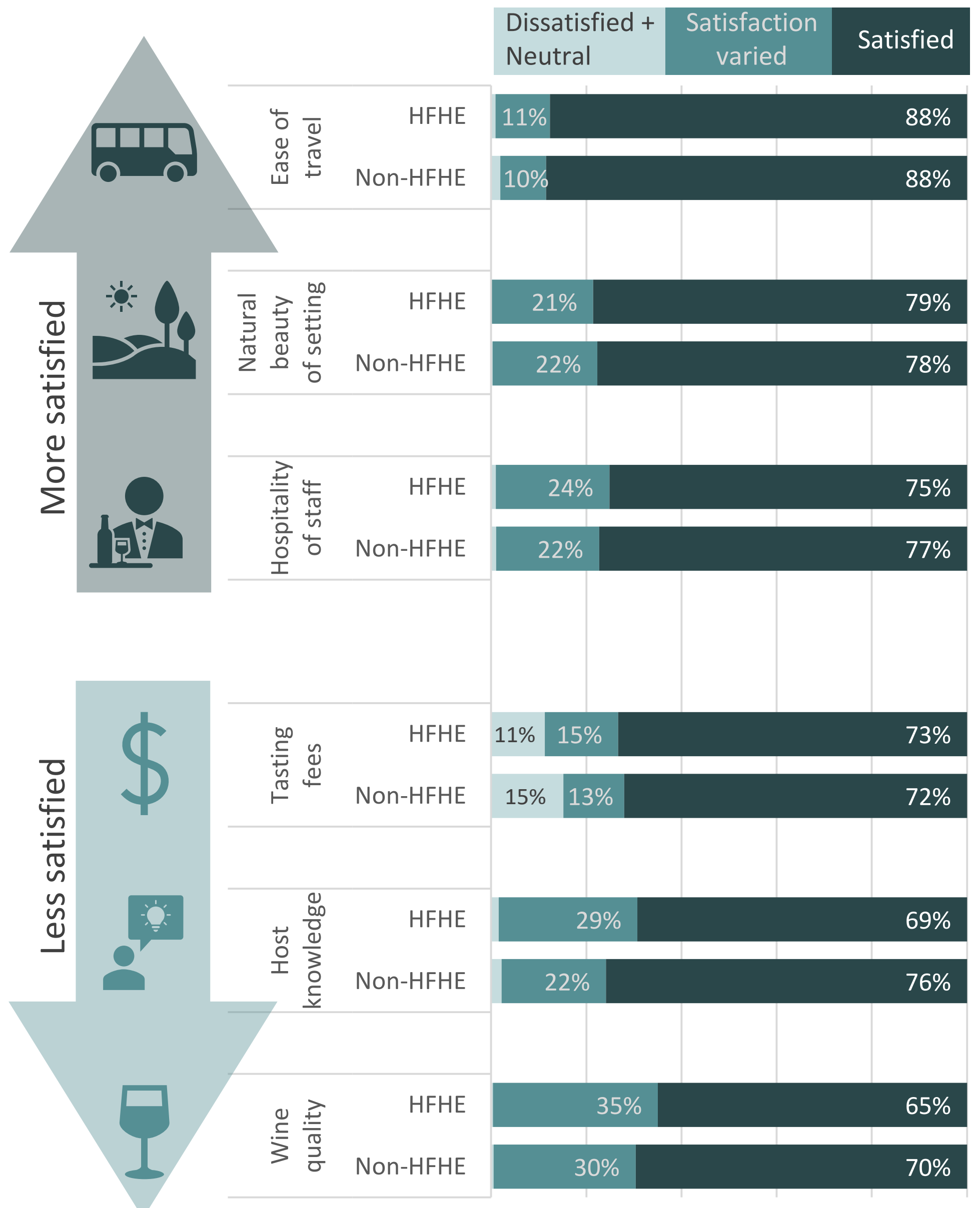
How satisfied or dissatisfied were you with the following traits or features of your experience at wineries during your trip?

Traits/features with highest and lowest satisfaction

The majority of Rogue Valley respondents were satisfied with all the traits and features of wineries we asked about (quality of the wines, value of the wines for their price, cost of tasting fees, ease of travel to and finding the wineries, natural beauty of properties and setting, attractiveness of the facilities – architecture, décor, grounds, amenities, presentation and knowledge of winery hosts, and friendliness/hospitality of winery staff). Only the cost of tasting fees garnered more than 2% of respondents expressing dissatisfaction or ambivalence.

Respondents felt the most mixed satisfaction with wine quality. Around one-third of respondents said that their satisfaction with wine quality varied greatly by winery, a higher proportion than for any other winery trait or feature.

High-frequency, high-end (HFHE) respondents reported similar satisfaction levels as respondents who drink wine less frequently and at lower price-points, with two exceptions. Fewer HFHE respondents were satisfied with the host's presentation and knowledge than non-HFHE respondents and fewer HFHE respondents were satisfied with the wine quality. This makes sense as HFHE consumers might hold both hosts and the wine to higher standards than the average wine drinker.



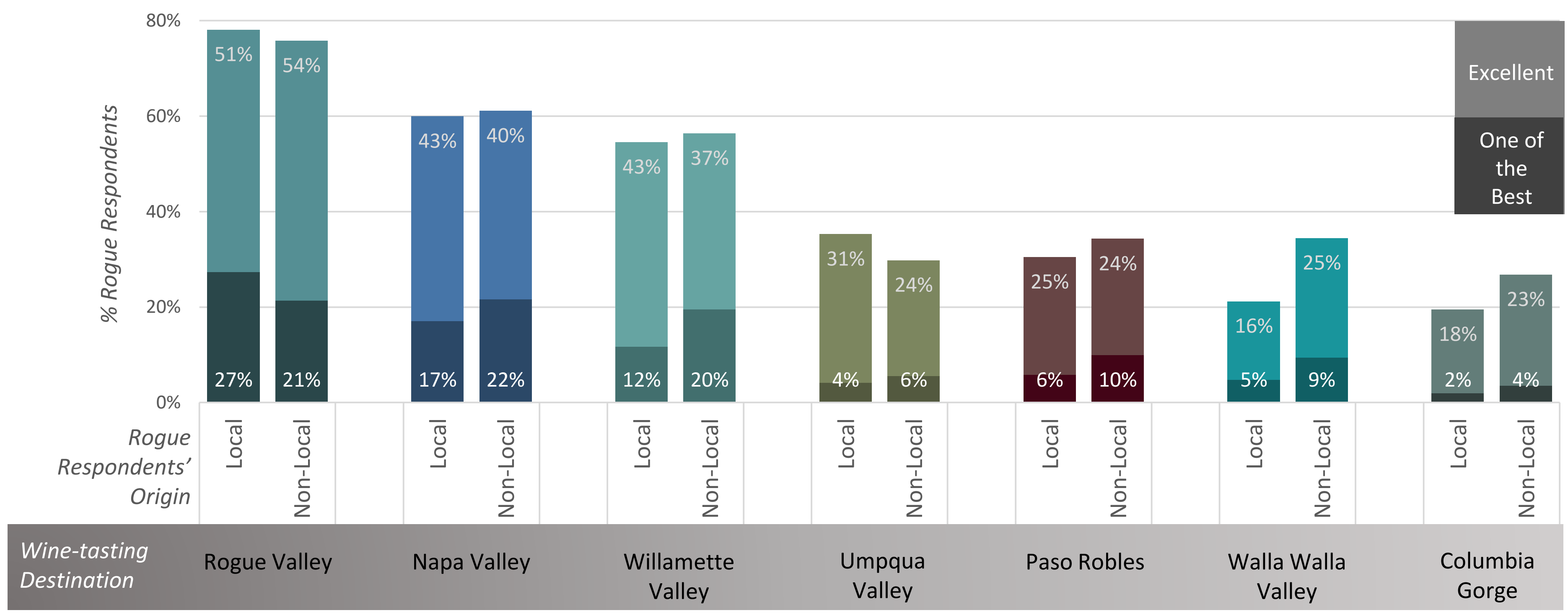
How would you rate the quality of the wine from the following regions?

Percentage of respondents rating wine quality as "one of the best" or "excellent"

Rogue Valley respondents (both local and non-local) thought very highly of the region's wine. Respondents could rate each region's wine as one of the best, excellent, good, average, poor quality, or undecided/not familiar with the wines. Compared to other regions, the highest proportion of respondents (just over three-quarters) rated the Rogue Valley's wines as one of the best or excellent.

With the exception of the Rogue Valley and Umpqua Valley, non-local respondents thought more highly of other regions' wines than locals. This suggests that those who are in or near a wine region are likely to think more highly of the region's wine than those without a geographic attachment to the area.

Interestingly, Umpqua Valley and Columbia Gorge respondents ranked Rogue Valley wines lower than Rogue respondents: both ranked Rogue wine quality 6th of the seven regions. *See pages 85 and 94.*



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

Attributes selected by the three highest percentages of respondents

Rogue Valley

Rogue Valley respondents reported greater familiarity with the Rogue Valley than Willamette Valley and Walla Walla Valley wines and characterized the region as producing a wide variety of wines, having many small artisan producers, and offering wines that are a good value for the money. There was little difference between high-frequency, high-end (HFHE) respondents and non-HFHE respondents, although a slightly higher percentage of non-HFHE respondents stated that they were not familiar enough with the regions to rate their qualities.

Willamette Valley

Rogue Valley respondents were slightly less familiar with the Willamette Valley (between one-quarter and one-third were not familiar enough to select responses). Those who were familiar characterized the region as prestigious, being a reliable choice, having many small artisan producers, and producing a wide variety of wines. More HFHE respondents associated the region with prestige than being a reliable choice, while more non-HFHE respondents associated it with being a reliable choice than prestige.

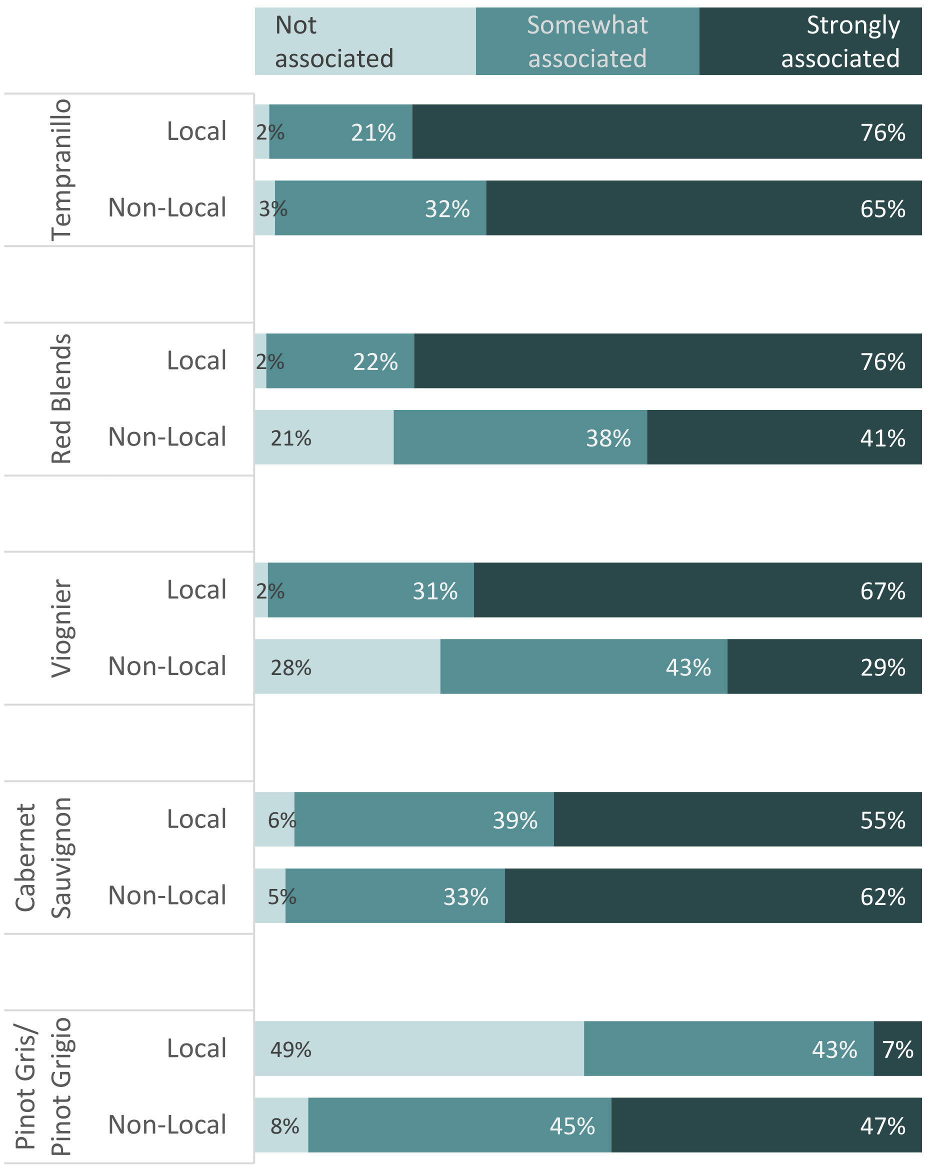
Walla Walla Valley

Rogue Valley respondents were the least familiar with the Walla Walla Valley (around two-thirds were not familiar enough to select responses). Those who were familiar with it characterized the region as producing a wide variety of wines and having many small artisan producers. More HFHE respondents associated the region with producing a wide variety of wines than having artisanal producers, while about the same proportion of non-HFHE respondents associated both these features with the region.

	HFHE		Non-HFHE	
Rogue	Produces wide variety of wines	81%	Produces wide variety of wines	79%
	Many artisanal producers	78%	Many artisanal producers	75%
	Good value	75%	Good value	71%
Willamette	Prestigious	59%	Reliable choice	49%
	Reliable choice	54%	Prestigious	48%
	Many artisanal producers	50%	Produces wide variety of wines	43%
Walla Walla	Don't Know	58%	Don't Know	67%
	Produces wide variety of wines	28%	Many artisanal producers	21%
	Many artisanal producers	27%	Produces wide variety of wines	21%

How strongly do you associate each of the following varieties with the Rogue Valley?

Varieties with the strongest association



Local and non-local Rogue Valley respondents had different perceptions about which wine varieties are strongly associated with the Rogue Valley (although there was some overlap).

The highest percentage of **local** respondents said the following three wines were strongly associated with the Rogue Valley:

- Tempranillo
- Red Blends
- Viognier

The highest percentage of **non-local** respondents said the following three wines were strongly associated with the Rogue Valley:

- Tempranillo
- Cabernet Sauvignon
- Pinot Gris/Pinot Grigio

A far smaller percentage of local respondents strongly associated cabernet sauvignon with the Rogue Valley than non-local respondents. On the other hand, a smaller percentage of non-local respondents associated red blends and viognier with the region than local respondents.

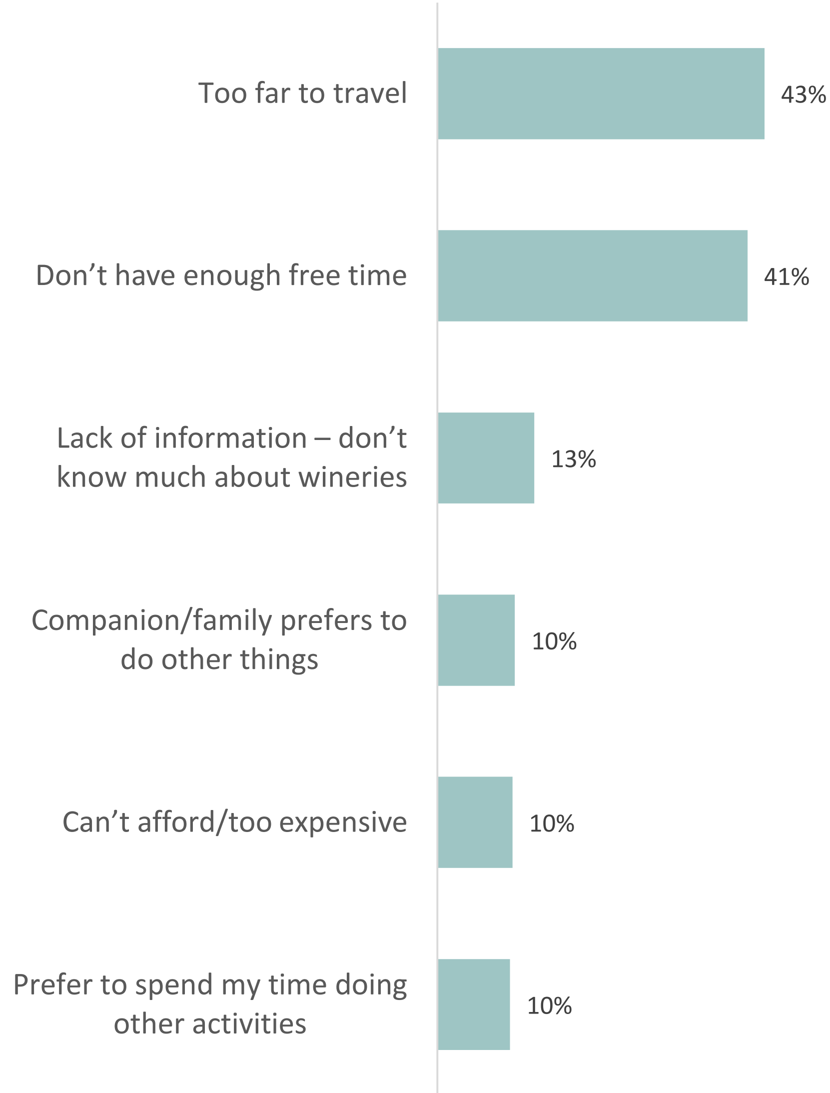
This suggests that what external consumers hear about or experience from the Rogue Valley differs from what locals understand or experience. It is not necessarily good or bad to have different local and external perceptions. If the Rogue Valley hopes to promote a consistent message about varieties associated with its brand, however, the difference in perception identified by this survey suggests that the region has more work to do on promoting a common message.

What factors prevent you from returning to or visiting wineries in the Rogue Valley more frequently?

We asked respondents who didn't live in the Rogue Valley and who had never visited a winery or who hadn't visited a winery recently what prevented them from going. The largest proportion of Rogue Valley respondents cited distance and lack of free time as barriers, two factors which unfortunately are mostly beyond the control of regional winery promoters.

Regional winery promoters could, however, address lack of information, the next most commonly referenced barrier to winery visitation. As a lesser-know wine region compared to the Willamette Valley or wine regions in Washington and California, the Rogue Valley should continue devoting resources to raising the area's profile.

Based on other information gathered through this survey, we know that Rogue Valley respondents were most likely to choose wineries based on word-of-mouth recommendations and individual wineries' websites. Winery promoters should keep these resources in mind as they work to familiarize more potential winery visitors with the Rogue Valley. There may be opportunities to target messaging towards "influencers" who can spread the word to their networks. It will also be important to work with individual wineries to ensure their websites are attractive and offer important information like hours of operation and directions in a prominent and easily-accessible location.



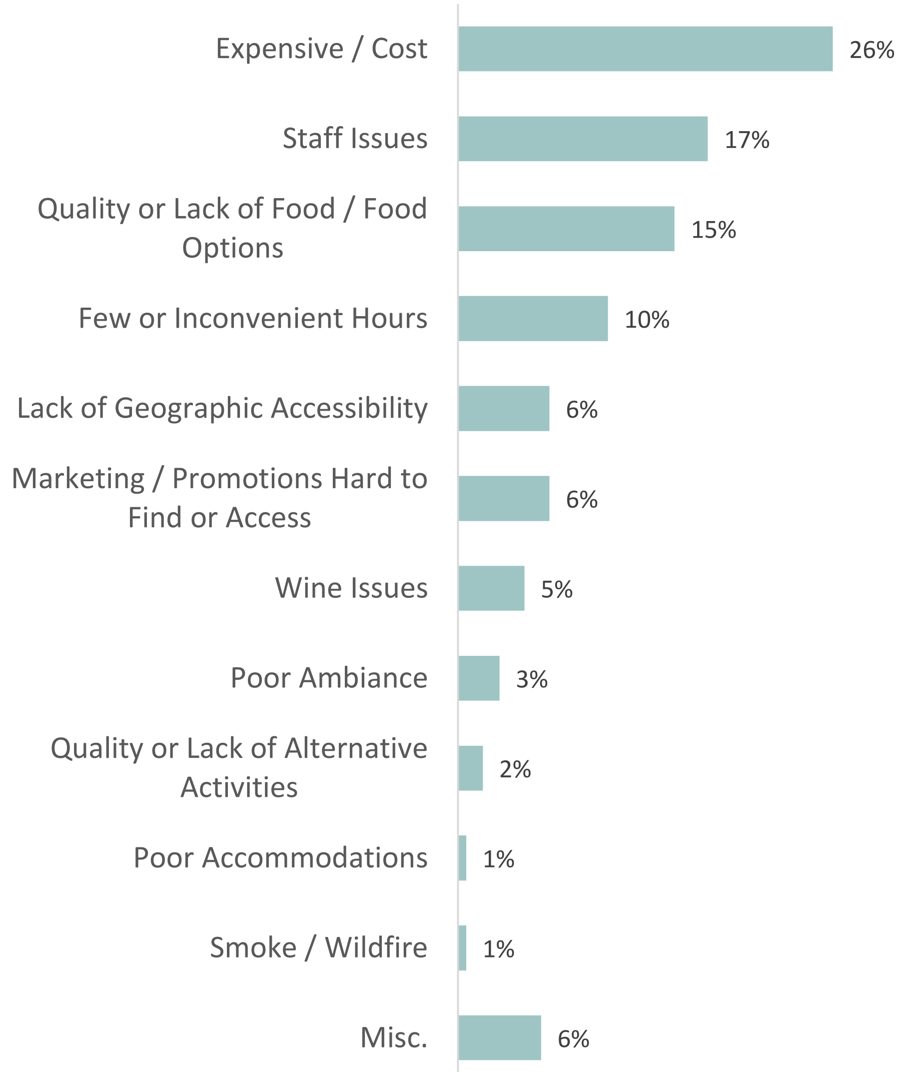
Do you have any other suggestions or comments about your experience at wineries in the Rogue Valley?

Critical comments provided by respondents

The highest percentage of respondents commented on the price of wine and wine tastings as a negative aspect of their visit. As one respondent commented, “I believe the goal of a winery should be to make a visitor want to buy the wine next time they see it in a store, not be ticked off at the price they paid at the winery.” Another respondent expressed understanding for why wineries charge tasting fees, but added that “we did go more often when there was no charge for tastings. We understand why you had to start charging, but it's a little less friendly.”

Many respondents also commented on various issues they encountered with staff. A handful of respondents felt that the winery staff they encountered were not as knowledgeable as they hoped. Several others made comments about “snobbery” and wished that staff were more welcoming.

Respondents’ comments on food mostly centered around lack of options. Many respondents wanted to see a greater variety of food options offered at tasting rooms.



Do you have any other suggestions or comments about your experience at wineries in the Rogue Valley?

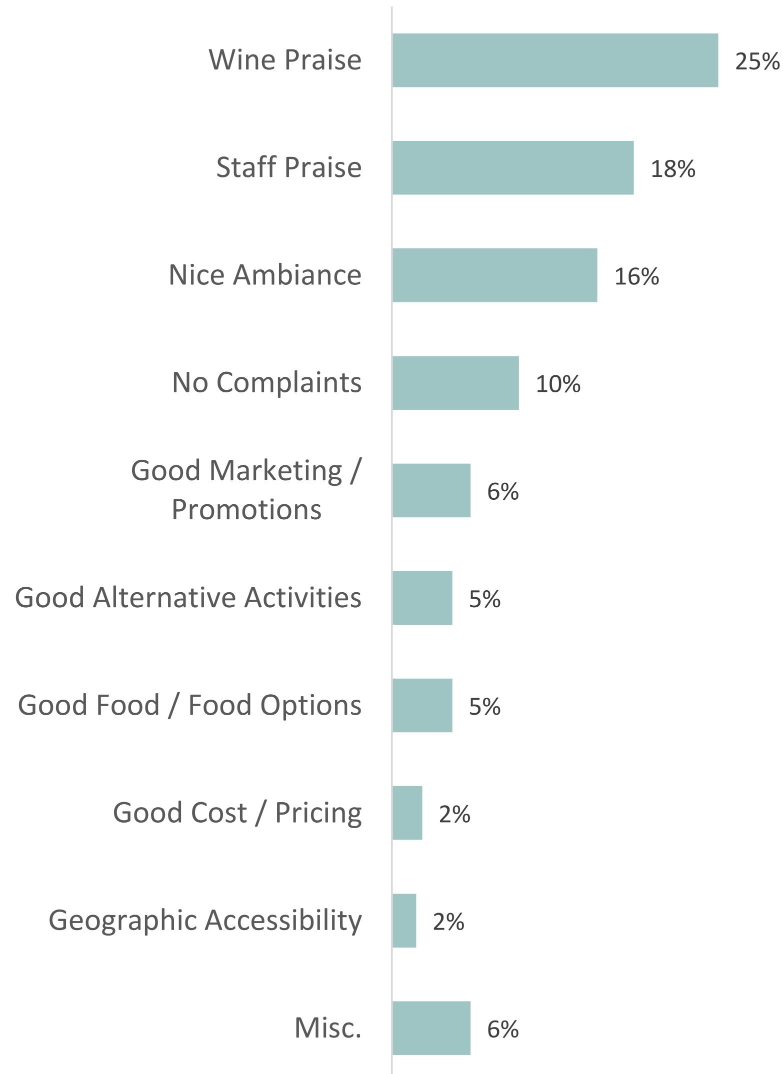
Positive comments and opportunities for improvement provided by respondents



Rogue Valley respondents praised wine quality, winery staff, and tasting room ambiance. Many respondents commented on the region's high quality wine, calling it "delicious," "exceptional," and "the very best." Others focused more on the experience of visiting wineries: "Good wine is important, but to us, the welcoming atmosphere and ability to enjoy a comfortable experience and have a small bite to eat brings us back. Also, the ability for the staff to be able to do a bit of 'teaching' when it comes to what I'm tasting is a nice touch."

Respondents particularly emphasized that they appreciate the more "laid-back," "small-town" feel of wineries in the Rogue Valley. One respondent commented that they "truly enjoy that it is not overly crowded like the Napa Valley," while another cautioned, "resist becoming Napa/Sonoma - i.e. don't be snobs or overpriced."

Some respondents had suggestions for improving their wine experience. One asked to "bring back the wine passport weekend, or month if possible." Another said that a "book that includes maps, tasting fees, hours of operation, average price of wine and types of wines available of your area would be helpful."



WINE-SPECIFIC REGIONAL PERCEPTIONS

UMPQUA VALLEY

Key Takeaways from Umpqua Valley Respondents

Satisfaction with Regional Wine Qualities

- Respondents thought very highly of the Umpqua Valley as a wine-tasting destination – a higher percentage of respondents rated it as excellent or one of the best than any other region.
- Respondents were particularly satisfied with the ease of travel to wineries, the natural beauty of the winery settings, and the value of the wines for the price.

Regional Comparisons

- Respondents held wines from the Umpqua Valley, Willamette Valley, and Napa Valley in particularly high regard.

Regional Associations

- Respondents associated the Umpqua Valley with having many small artisan producers, producing a wide variety of wines, and offering wines that are a good value for the money.
- Respondents associated the Umpqua Valley with tempranillo, pinot noir, red blends, and syrah.

Barriers

- The largest proportions of respondents cited distance and lack of free time as barriers to visiting wineries or visiting more frequently.
- The fourth largest proportion of respondents cited lack of information as a barrier.

Strengths & Opportunities

- Respondents praised their experience with staff in tasting rooms and the quality of Umpqua Valley wines.
- Respondents who had used the Umpqua Valley Growers Wine Trail Map commented that this was an excellent tool for discovering and exploring wineries.
- Respondents like the “relaxing, rustic, and real” ambiance of Umpqua Valley wineries. They did not want the region to become pretentious or pricey.

Photo courtesy of Travel Southern Oregon, https://www.southernoregon.org/sip-the-day-away-on-the-umpqua-valley-wine-trail/

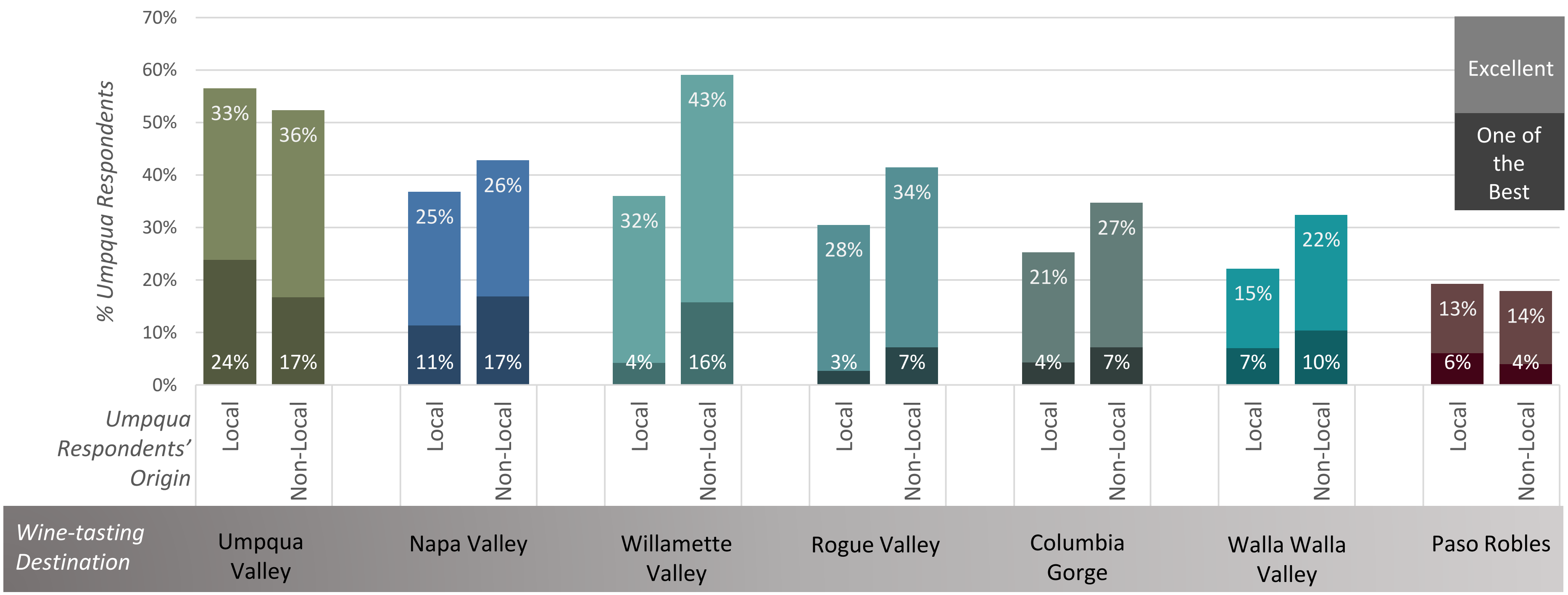
How would you rate the following regions as a leisure travel/vacation/getaway destination for wine tasting?

Percentage of respondents rating destination quality as "one of the best" or "excellent"

Umpqua Valley respondents (both local and non-local) regarded the Umpqua Valley as a high quality wine-tasting destination. Respondents could rate each wine-tasting destination as one of the best, excellent, good, average, poor quality, or undecided/not familiar with the region. Compared to other regions, the highest proportion of local respondents (a little over half) rated the Umpqua Valley as one of the best or excellent. Non-locals ranked it 2nd after the Willamette Valley.

With the exception of the Umpqua Valley and Paso Robles, non-local respondents thought more highly of other regions as wine-tasting destinations than locals. Non-locals were also generally more familiar with other regions than locals. With the exception of the Umpqua and Rogue Valleys, a greater proportion of non-locals than locals had sufficient familiarity with other regions to rate them.

Interestingly, Rogue Valley and Columbia Gorge respondents ranked the Umpqua Valley lower than Umpqua respondents (in 6th and 7th place respectively). *See pages 74 and 92.*



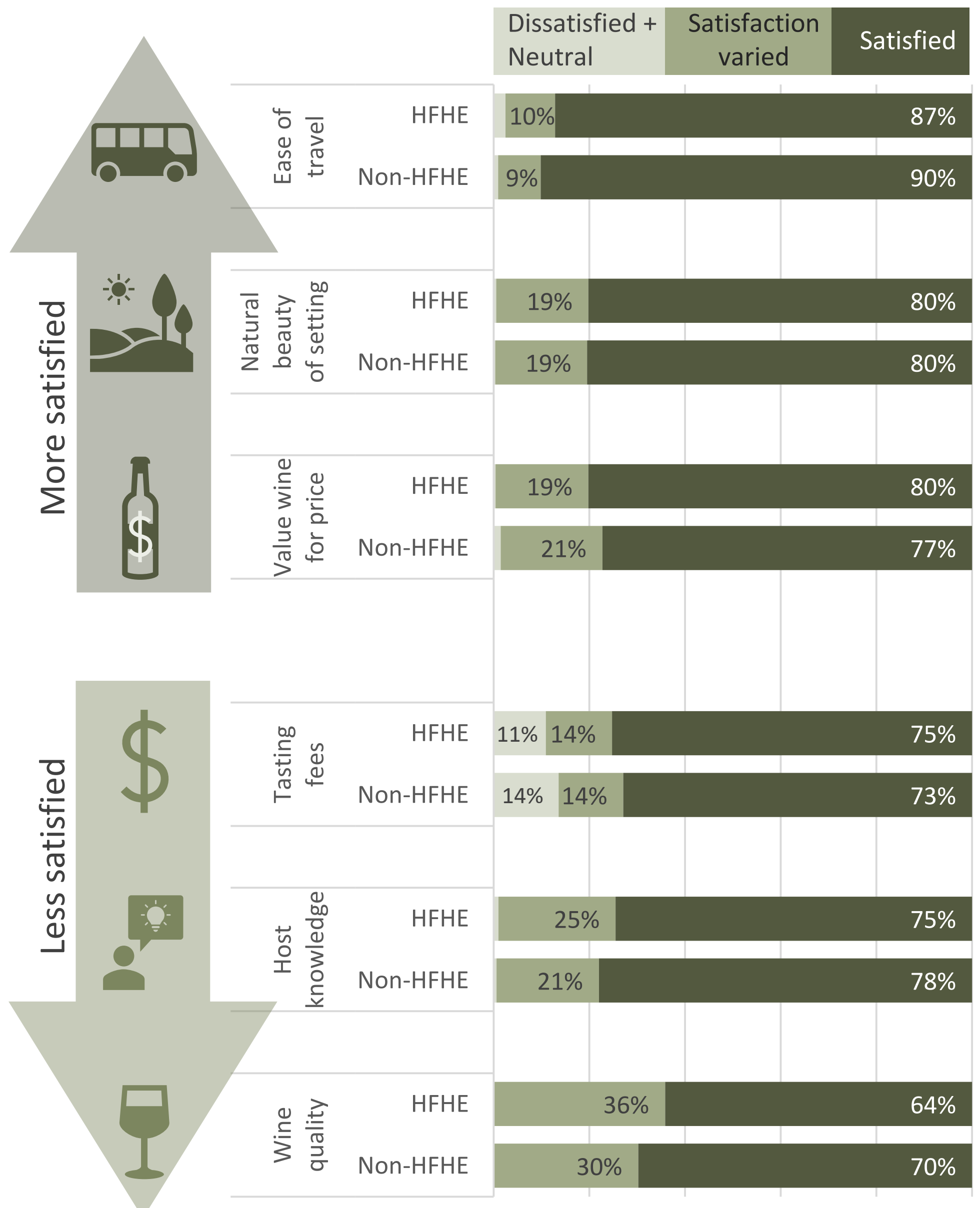
How satisfied or dissatisfied were you with the following traits or features of your experience at wineries during your trip?

Traits/features with highest and lowest satisfaction

The majority of Umpqua Valley respondents were satisfied with all the traits and features of wineries we asked about (quality of the wines, value of the wines for their price, cost of tasting fees, ease of travel to and finding the wineries, natural beauty of properties and setting, attractiveness of the facilities – architecture, décor, grounds, amenities, presentation and knowledge of winery hosts, and friendliness/hospitality of winery staff). Only the cost of tasting fees garnered more than 2% of respondents expressing dissatisfaction or ambivalence.

Respondents felt the most mixed satisfaction with wine quality and the host's presentation and knowledge. Between one-fifth and one-third of respondents said that their satisfaction with these two features varied greatly by winery, a higher proportion than for any other winery trait or feature.

High-frequency, high-end (HFHE) respondents reported similar satisfaction levels as respondents who drink wine less frequently and at lower price-points, although fewer HFHE respondents expressed satisfaction with wine quality than non-HFHE respondents. This makes sense as HFHE respondents likely hold wine quality to a higher standard than the average wine drinker.



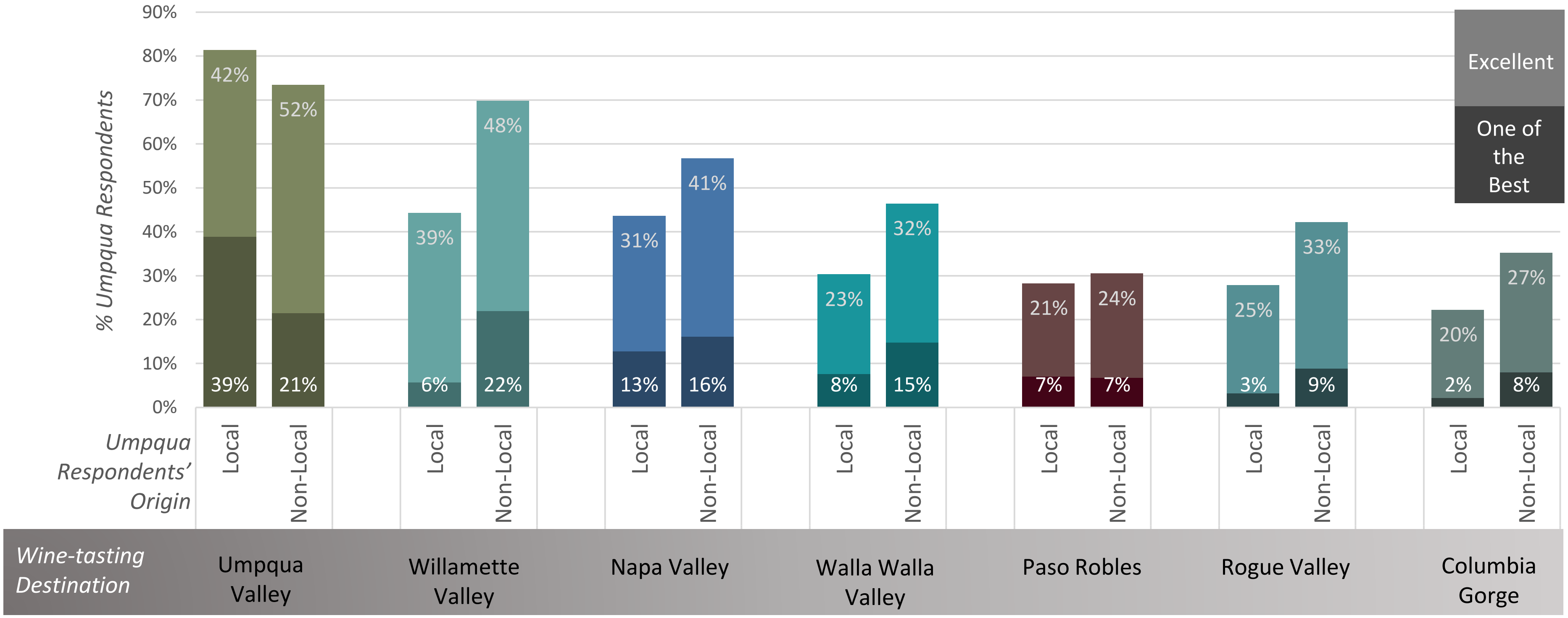
How would you rate the quality of the wine from the following regions?

Percentage of respondents rating wine quality as "one of the best" or "excellent"

Umpqua Valley respondents (both local and non-local) thought very highly of the region's wine. Respondents could rate each region's wine as one of the best, excellent, good, average, poor quality, or undecided/not familiar with the wines. Compared to other regions, the highest proportion of respondents (around three-quarters) rated the Umpqua Valley's wines as one of the best or excellent.

With the exception of the Umpqua Valley, non-local respondents thought more highly of other wine regions than locals. This suggests that those who are in a wine region are likely to think more highly of the region's wine than those without a geographic attachment to the area. The gap between local and non-local perceptions is greater among Umpqua Valley respondents than Rogue Valley or Gorge respondents.

Interestingly, Rogue Valley and Gorge respondents ranked Umpqua Valley wines lower than Umpqua respondents (in 4th place or lower). *See pages 76 and 94.*



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

Attributes selected by the three highest percentages of respondents

Umpqua Valley

High-end, high-frequency (HFHE) Umpqua Valley respondents were more familiar with the Umpqua Valley than non-HFHE respondents (13% of whom said they were not familiar enough with the region to provide responses). Those who were familiar with the Umpqua Valley in both groups characterized the region as having many small artisan producers, producing a wide variety of wines, and offering wines that are a good value for the money. About the same proportion of HFHE respondents associated the region with wine variety and having good value wines, while a slightly higher proportion of non-HFHE respondents associated the region with good value than wine variety.

Willamette Valley

Non-HFHE Umpqua Valley respondents were slightly less familiar with the Willamette Valley than the Umpqua Valley. Around one-fifth of both HFHE and non-HFHE respondents said they were not familiar enough with the Willamette Valley to provide responses. Those who were familiar characterized the region as prestigious, being a reliable choice, and having many small artisan producers. More HFHE respondents said the region was prestigious than reliable while more non-HFHE respondents said the region was reliable than prestigious.

Rogue Valley

Umpqua Valley respondents were the least familiar with the Rogue Valley (between one-third and half were not familiar enough to select responses). Those who were familiar with it characterized the region as having many small artisan producers, producing a wide variety of wines, and offering wines that are a good value. A greater proportion of HFHE respondents were familiar with the Rogue Valley than non-HFHE respondents.

	HFHE		Non-HFHE	
Umpqua	Many artisanal producers	82%	Many artisanal producers	75%
	Produces wide variety of wines	81%	Good value	73%
	Good value	81%	Produces wide variety of wines	72%
Willamette	Prestigious	69%	Reliable choice	61%
	Reliable choice	59%	Prestigious	59%
	Many artisanal producers	57%	Many artisanal producers	57%
Rogue	Many artisanal producers	51%	Don't Know	47%
	Produces wide variety of wines	46%	Many artisanal producers	42%
	Good value	43%	Produces wide variety of wines	36%

How strongly do you associate each of the following varieties with the Umpqua Valley?

Varieties with the strongest association

Local and non-local Umpqua Valley respondents had similar perceptions about which wine varieties are strongly associated with the Umpqua Valley, with some variation in strength of association.

The highest percentage of **local** respondents said the following three wines were strongly associated with the Umpqua Valley:

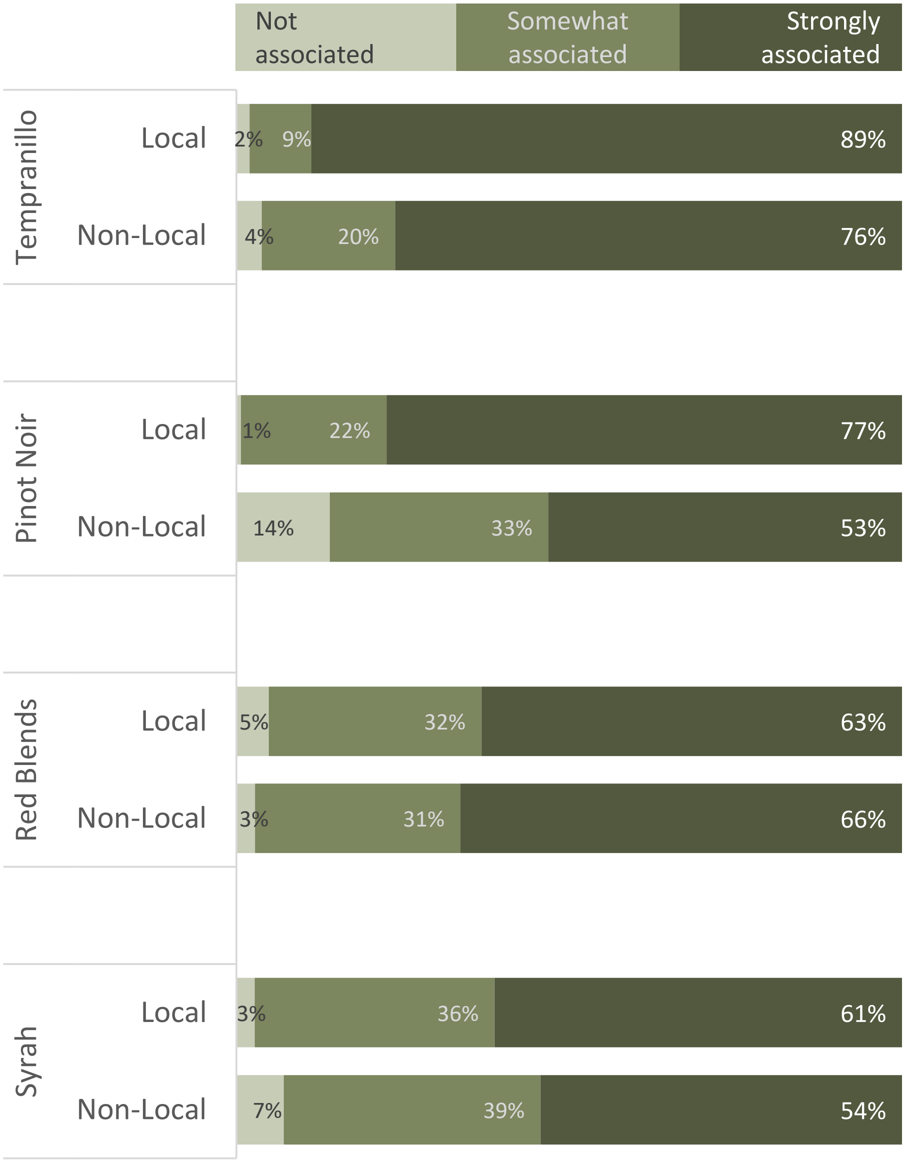
- Tempranillo
- Pinot Noir
- Red Blends

The highest percentage of **non-local** respondents said the following three wines were strongly associated with the Umpqua Valley:

- Tempranillo
- Red Blends
- Syrah

A slightly smaller percentage of local respondents associated red blends with the Umpqua Valley than non-local respondents. A larger percentage of local respondents associated the other three varieties (particularly pinot noir) with the Umpqua Valley than non-local respondents.

While there is some difference in external versus local perception about the wine varieties most strongly associated with the Umpqua Valley, survey responses suggest that the Umpqua Valley is projecting a similar message to both locals and those outside the region. If the varieties listed here are not aligned with what the Umpqua Valley's wine industry wants to promote, the region will have to work to elevate other varieties.

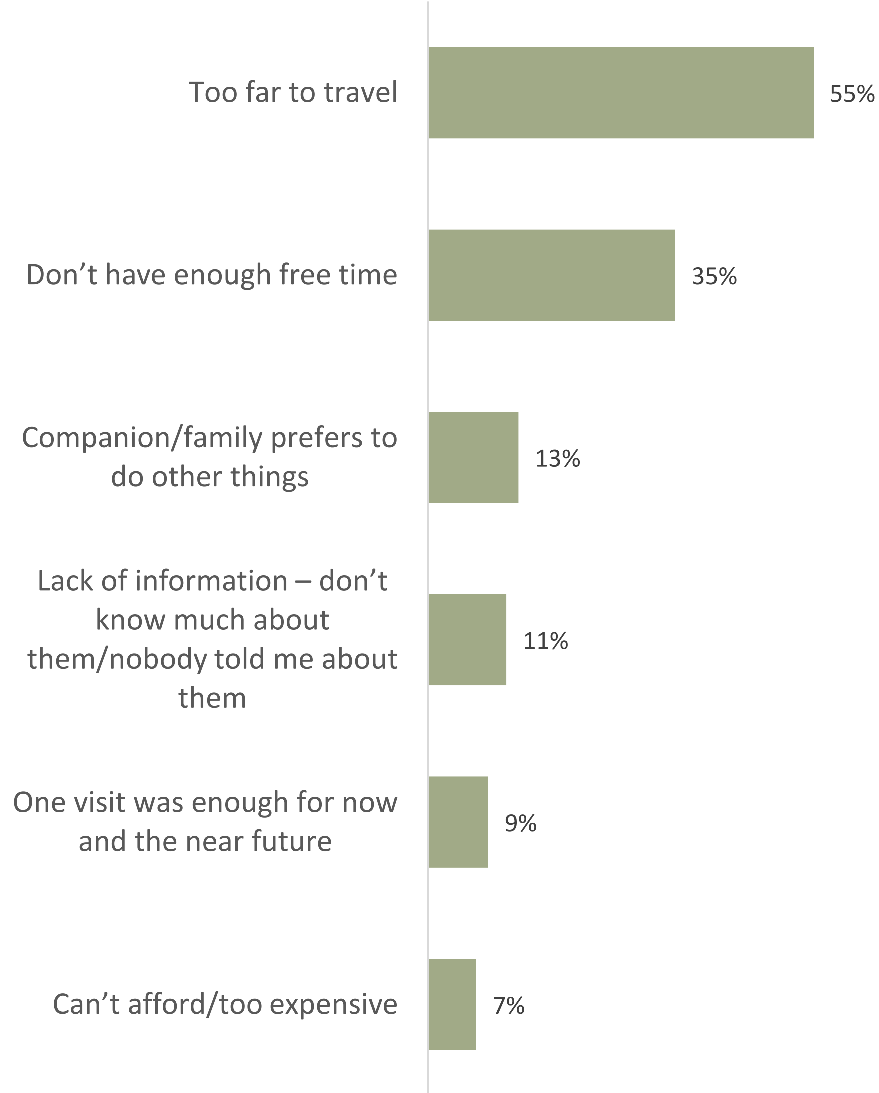


What factors prevent you from returning to or visiting wineries in the Umpqua Valley more frequently?

We asked respondents who didn't live in the Umpqua Valley and who had never visited a winery or who hadn't visited a winery recently what prevented them from going. The largest proportion of Umpqua Valley respondents cited distance and lack of free time as barriers, two factors which unfortunately are mostly beyond the control of regional winery promoters.

Regional winery promoters could, however, address lack of information, the fourth most commonly referenced barrier to winery visitation. As a lesser-know wine region compared to the Willamette Valley or wine regions in Washington and California, the Umpqua Valley should devote more resources to raising the area's profile.

Based on other information gathered through this survey, we know that Umpqua Valley respondents were most likely to choose wineries based on word-of-mouth recommendations, free travel guides, individual wineries' websites, and the Umpqua Valley Winegrowers website. Winery promoters should keep these resources in mind as they work to familiarize more potential winery visitors with the Umpqua Valley. There may be opportunities to target messaging towards "influencers" who can spread the word to their networks. It will also be important ensure that travel guides and the Umpqua Valley Winegrowers website provide accurate information about wineries. Finally, regional winery promoters should work with individual wineries to ensure their websites are attractive and offer important information like hours of operation and directions in a prominent and easily-accessible location.



Do you have any other suggestions or comments about your experience at wineries in the Umpqua Valley?

Critical comments provided by respondents

Several respondents complained about the cost of tasting fees. One respondent commented on what they see as a troubling trend in the Umpqua Valley: “One of the things that keeps us privileging the Umpqua over the Willamette Valley is that the tasting fees have traditionally been more reasonable even though the quality of the wine is high. On our last trip, we were concerned that this seems to be changing in some wineries. We fear that this trend will continue, which would make us less likely to tour the Umpqua wineries in the future and get us exploring other areas.”

Other respondents focused on what they view as a lack of development at some tasting rooms. One respondent commented that “some properties could use some design help,” and another complained that their party had to stand the entire time because there wasn’t enough seating.

Some respondents commented that they wished Umpqua Valley wineries invested more in promotion (for example, making brochures about wineries more accessible) and in special promotional events at tasting rooms (for example, a Mother’s Day brunch).

***Note:** Only 29 people provided critical comments, making the sample size considerably smaller than most of the other results presented in this report.*

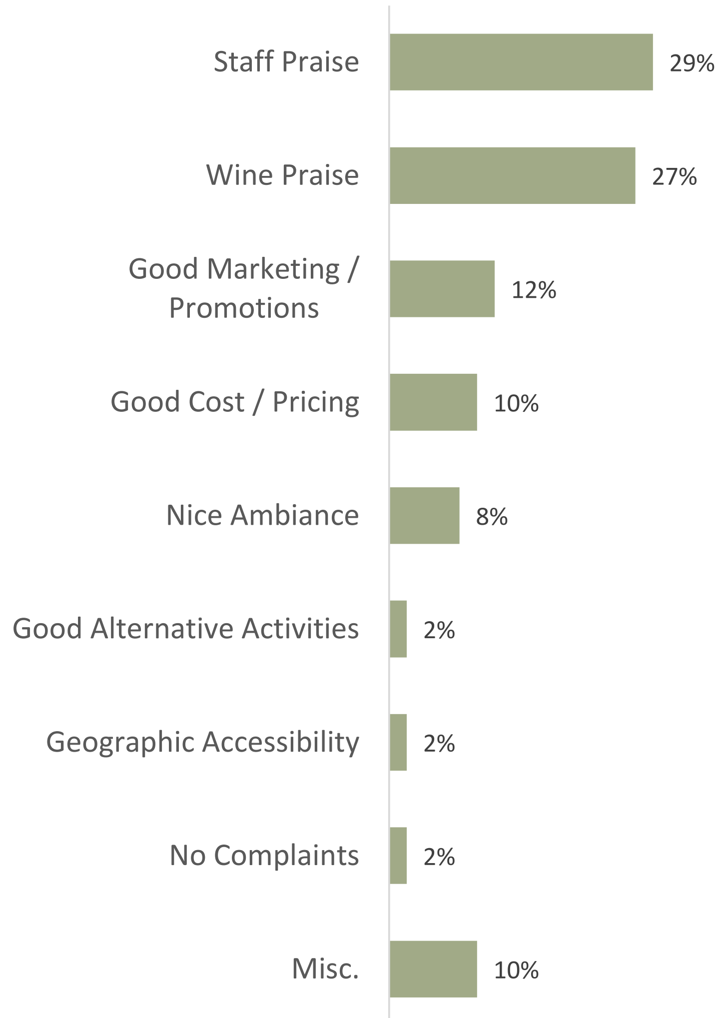
Do you have any other suggestions or comments about your experience at wineries in the Umpqua Valley?

Positive comments and opportunities for improvement provided by respondents

Respondents praised their experience with winery staff as well as the wine they consumed. As one respondent commented, “everyone was nice and helpful that we encountered. Variety of wines was good (something for every palate). Wineries were all close enough together and easily accessible. We have been several times and will come again.” Several other respondents also praised the staff they encountered as knowledgeable, friendly, and “excellent hosts.”

A few respondents used the Wine Trail Map and complimented the experience – “We really enjoyed the “hunt” to go to different locations.”

The Umpqua Valley’s ambiance resonated with many respondents. “Umpqua Valley wineries are unique,” one respondent commented. “Some have taken on the goal of an atmosphere like California, but most are comfortable in knowing their place, people, and product are what sets us apart in Oregon - especially the Umpqua Valley. It is not about the building. Umpqua Valley wineries are relaxing, rustic and real.” On a similar note, another respondent cautioned: “Please don't get caught up in the ‘if it's not expensive, it's not good wine’ syndrome that so many AVAs seem to adhere to these days! There are many of us who just refuse to pay $50 for a bottle of wine, no matter how good it is!”



***Note:** Only 52 people provided positive comments, making the sample size considerably smaller than most of the other results presented in this report.*

WINE-SPECIFIC REGIONAL PERCEPTIONS

COLUMBIA GORGE

Key Takeaways from Columbia Gorge Respondents

Satisfaction with Regional Wine Qualities

- Respondents thought very highly of the Columbia Gorge as a wine-tasting destination – a higher percentage of respondents rated it as excellent or one of the best than any other region.
- Respondents were particularly satisfied with the ease of travel to wineries and the natural beauty of the winery settings.

Regional Comparisons

- Respondents held wines from the Willamette Valley, the Columbia Gorge, Napa Valley, and the Walla Walla Valley in particularly high regard.

Regional Associations

- Respondents associated the Columbia Gorge with producing a wide variety of wines, offering wines that are a good value for the money, and having many small artisan producers.
- Respondents associated the Columbia Gorge with red blends, tempranillo, pinot noir, and syrah.

Barriers

- The largest proportions of respondents cited lack of free time and distance as barriers to visiting wineries or visiting more frequently.
- The next largest proportions of respondents cited expense/cost and lack of information as a barrier.

Strengths & Opportunities

- Respondents praised the high quality wine produced in the Columbia Gorge and shared positive experiences with winery staff.
- Respondents wanted better access to Columbia Gorge wines, both in other states and in the Portland Metro area.
- Many respondents liked that their wine experience in the Columbia Gorge was "unpretentious, affordable, engaging, and relaxed." They wanted the region to maintain this atmosphere and avoid becoming overly upscale like some California wine regions.

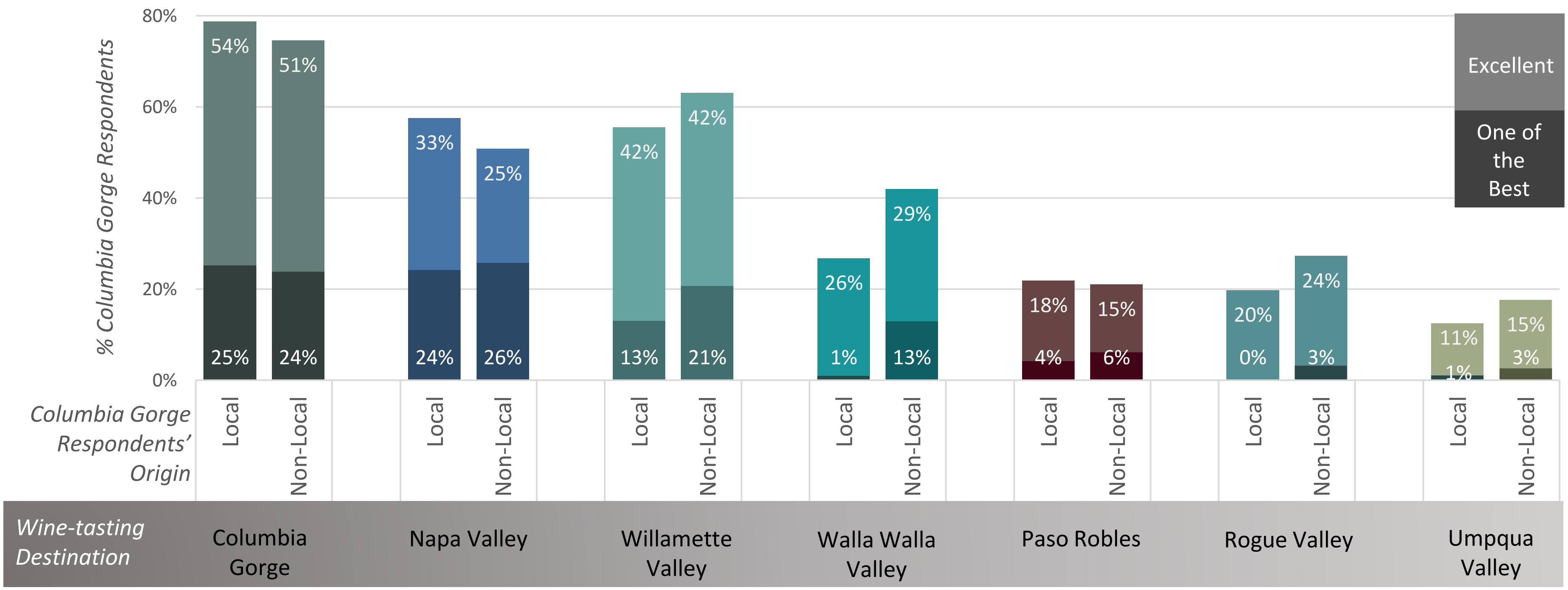
How would you rate the following regions as a leisure travel/vacation/getaway destination for wine tasting?

Percentage of respondents rating destination quality as "one of the best" or "excellent"

Columbia Gorge respondents (both local and non-local) regarded the Columbia Gorge as a high quality wine-tasting destination. Respondents could rate each wine-tasting destination as one of the best, excellent, good, average, poor quality, or undecided/not familiar with the region. Compared to other regions, the highest proportion of respondents (around three-quarters) rated the Columbia Gorge as one of the best or excellent.

With the exception of the Columbia Gorge, Napa Valley, and Paso Robles, non-local respondents thought more highly of other regions as wine-tasting destinations than locals. Non-locals were also generally more familiar with other regions than locals. With the exception of the Columbia Gorge and Napa Valley, a greater proportion of non-locals than locals had sufficient familiarity with other regions to rate them.

Interestingly, Rogue and Umpqua Valley respondents ranked the Columbia Gorge lower than Gorge respondents (in 4th and 5th place respectively). *See pages 74 and 83.*



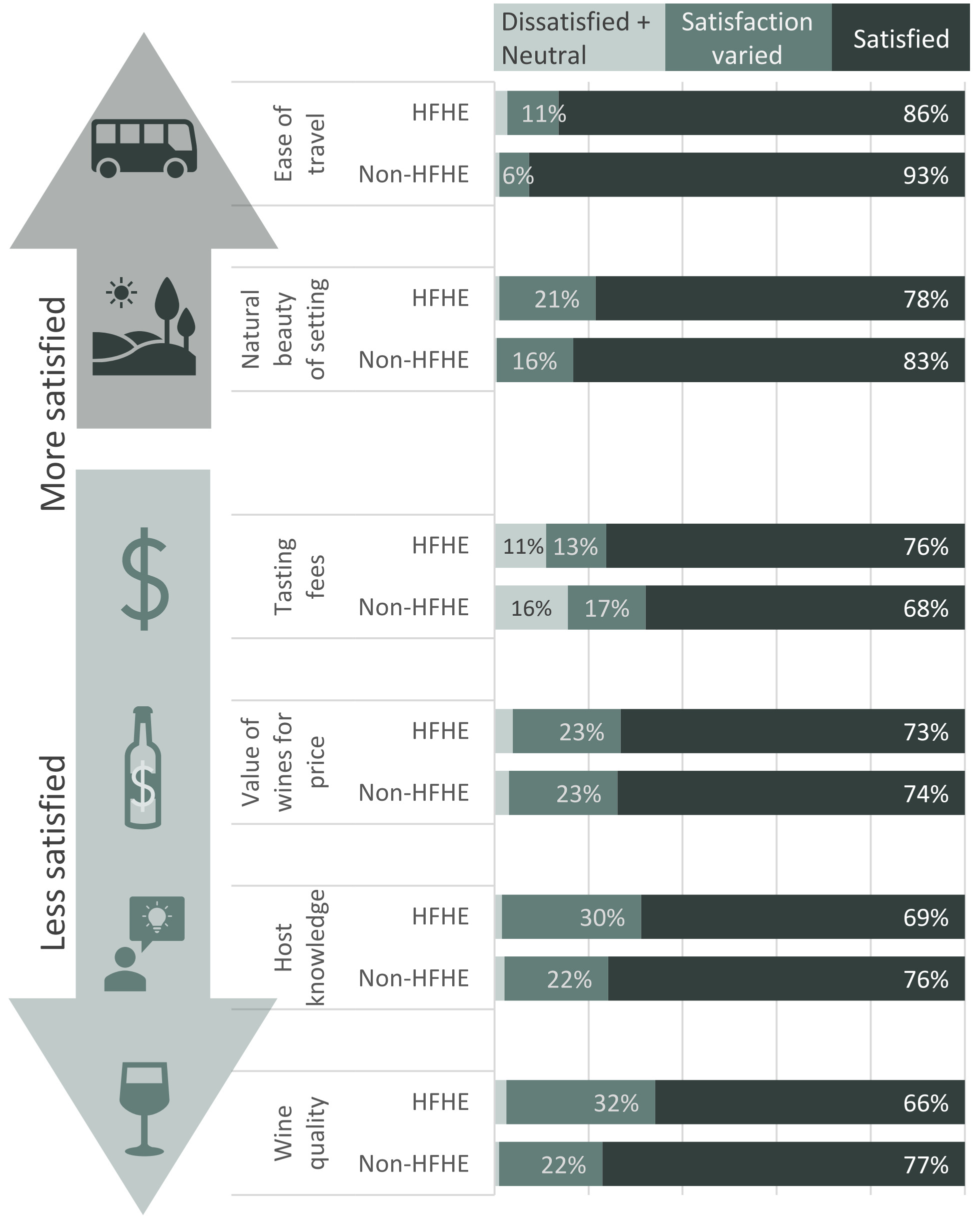
How satisfied or dissatisfied were you with the following traits or features of your experience at wineries during your trip?

Traits/features with highest and lowest satisfaction

The majority of Columbia Gorge respondents were satisfied with all the traits and features of wineries we asked about (quality of the wines, value of the wines for their price, cost of tasting fees, ease of travel to and finding the wineries, natural beauty of properties and setting, attractiveness of the facilities – architecture, décor, grounds, amenities, presentation and knowledge of winery hosts, and friendliness/hospitality of winery staff). Only the cost of tasting fees garnered more than 4% of respondents expressing dissatisfaction or ambivalence.

Respondents felt the most mixed satisfaction with host knowledge and wine quality. About one-quarter to one-third of respondents said that their satisfaction with these two features varied greatly by winery, a higher proportion than for any other winery trait or feature.

High-frequency, high-end (HFHE) respondents reported similar or lower satisfaction levels than respondents who drink wine less frequently and at lower price-points, with one exception: tasting fees. While the third highest percentage of HFHE respondents said they were satisfied with tasting fees, the lowest percentage of non-HFHE respondents said they were satisfied with tasting fees. Among non-HFHE respondents in all regions, satisfaction levels with tasting fees were lower in the Columbia Gorge than in other regions.



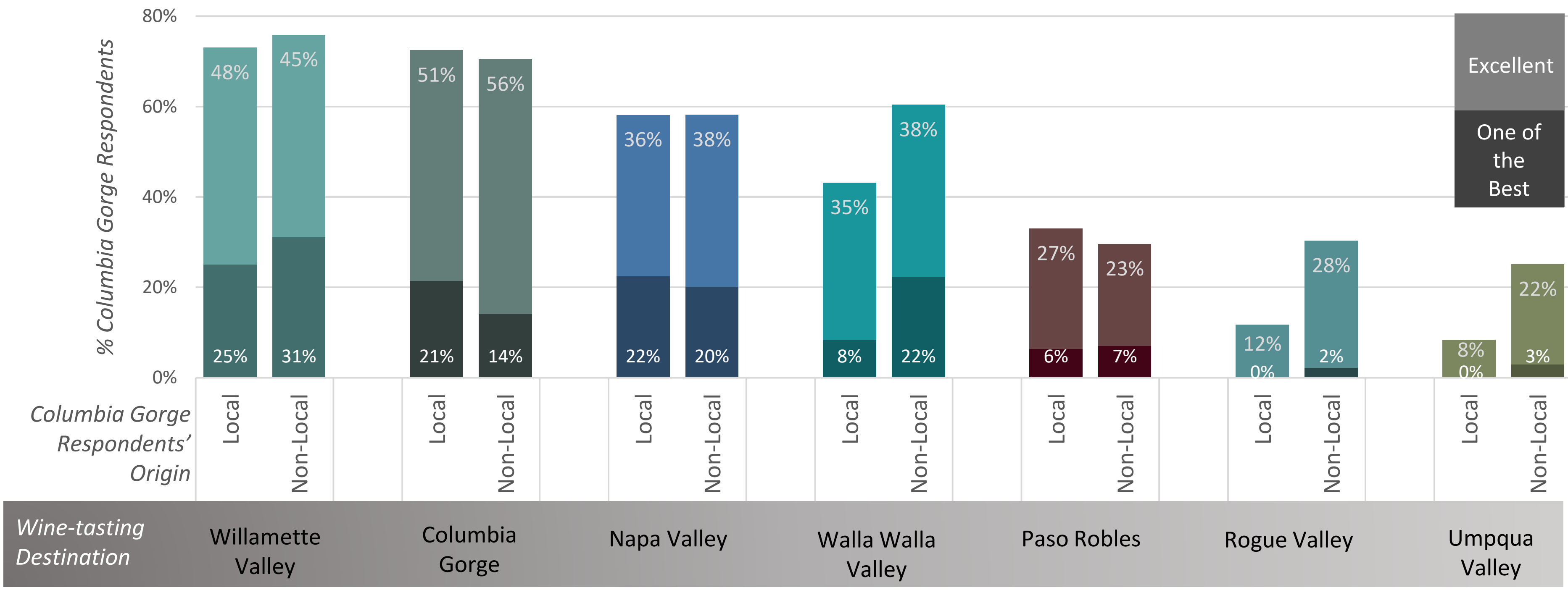
How would you rate the quality of the wine from the following regions?

Percentage of respondents rating wine quality as "one of the best" or "excellent"

Columbia Gorge respondents (both local and non-local) thought very highly of the region's wine. Respondents could rate each region's wine as one of the best, excellent, good, average, poor quality, or undecided/not familiar with the wines. Compared to other regions, the second highest proportion of respondents (around 70%) rated the Columbia Gorge's wines as one of the best or excellent.

In all but three regions (the Columbia Gorge, Napa Valley, and Paso Robles), non-local respondents thought more highly of other wine regions than locals. Though less conclusive than Rogue and Umpqua Valley respondents' ratings, this still suggests that those who live in a wine region are likely to think more highly of the region's wine than those without a geographic attachment to the area.

Interestingly, Rogue and Umpqua Valley respondents ranked Columbia Gorge wines lower than Gorge respondents: both ranked Columbia Gorge wine quality 7th of the seven regions. *See pages 76 and 85.*



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

Attributes selected by the three highest percentages of respondents

Columbia Gorge

Columbia Gorge respondents were more familiar with the Columbia Gorge than the other two regions and characterized the region as producing a wide variety of wines, offering wines that are a good value for the money, and having many small artisan producers. A slightly higher percentage of non-HFHE respondents were not familiar enough with the Columbia Gorge to select responses.

Willamette Valley

Columbia Gorge respondents were slightly less familiar with the Willamette Valley (between 7% and 13% didn't know enough to select responses). Those who were familiar characterized the region as prestigious, having many small artisan producers, and being a reliable choice. More HFHE respondents associated the Columbia Gorge with prestige and artisanal producers than being a reliable choice. This was reversed for non-HFHE respondents, slightly more of whom associated the region with being a reliable choice than prestige or artisanal producers.

Rogue Valley

Columbia Gorge respondents were the least familiar with the Rogue Valley (between half and two-thirds were not familiar enough to select responses). Those who were familiar with it characterized the region as offering wines that are a good value and having many small artisan producers. More HFHE respondents associated the region with good value than artisanal producers whereas more non-HFHE respondents associated the region with artisanal producers than good value.

	HFHE		Non-HFHE	
Gorge	Produces wide variety of wines	75%	Produces wide variety of wines	67%
	Good value	74%	Good value	64%
	Many artisanal producers	69%	Many artisanal producers	63%
Willamette	Prestigious	77%	Reliable choice	69%
	Many artisanal producers	74%	Prestigious	69%
	Reliable choice	71%	Many artisanal producers	64%
Rogue	Don't Know	53%	Don't Know	65%
	Good value	35%	Many artisanal producers	24%
	Many artisanal producers	31%	Good value	22%

How strongly do you associate each of the following varieties with the Columbia Gorge?

Varieties with the strongest association

Local and non-local Columbia Gorge respondents had similar perceptions about which wine varieties are strongly associated with the Columbia Gorge, with some variation in strength of association.

The highest percentage of **local** respondents said the following three wines were strongly associated with the Columbia Gorge:

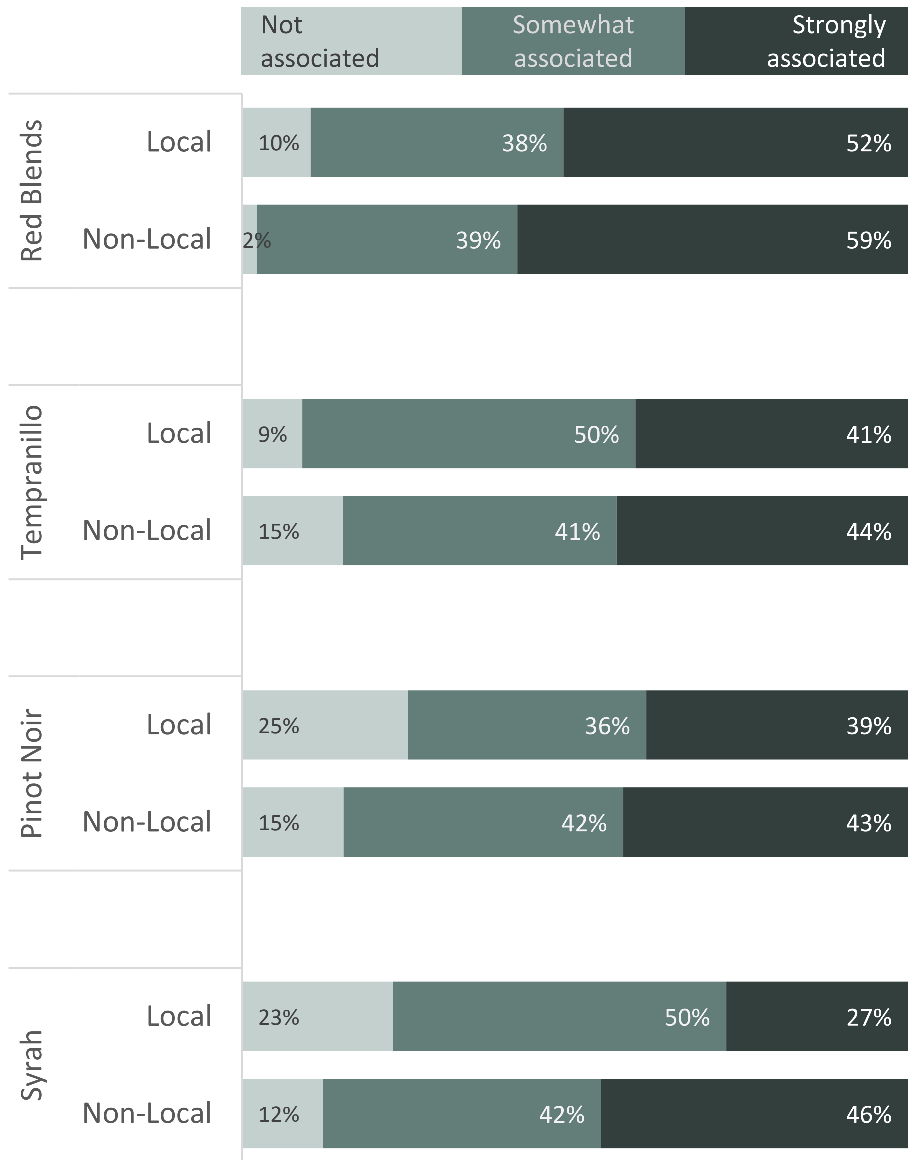
- Red Blends
- Tempranillo
- Pinot Noir

The highest percentage of **non-local** respondents said the following three wines were strongly associated with the Columbia Gorge:

- Red Blends
- Syrah
- Tempranillo

A smaller percentage of local respondents associated all four varieties with the Columbia Gorge than non-local respondents. As the sample size for Columbia Gorge local respondents is particularly small (17 to 29 respondents), it is difficult to say if the difference between local and non-local responses has any significance.

Columbia Gorge respondents did not perceive wine variety associations with the Columbia Gorge as strongly as Rogue and Umpqua Valley respondents perceived wine variety associations with each of their survey regions. The highest percentage of Columbia Gorge respondents to strongly associate a variety with the region was 59%, whereas the highest percentage of Rogue and Umpqua Valley respondents to strongly associate a variety with those regions was 76% and 89% respectively. This suggests that the Columbia Gorge has room to strengthen messaging about the region’s wine offerings.

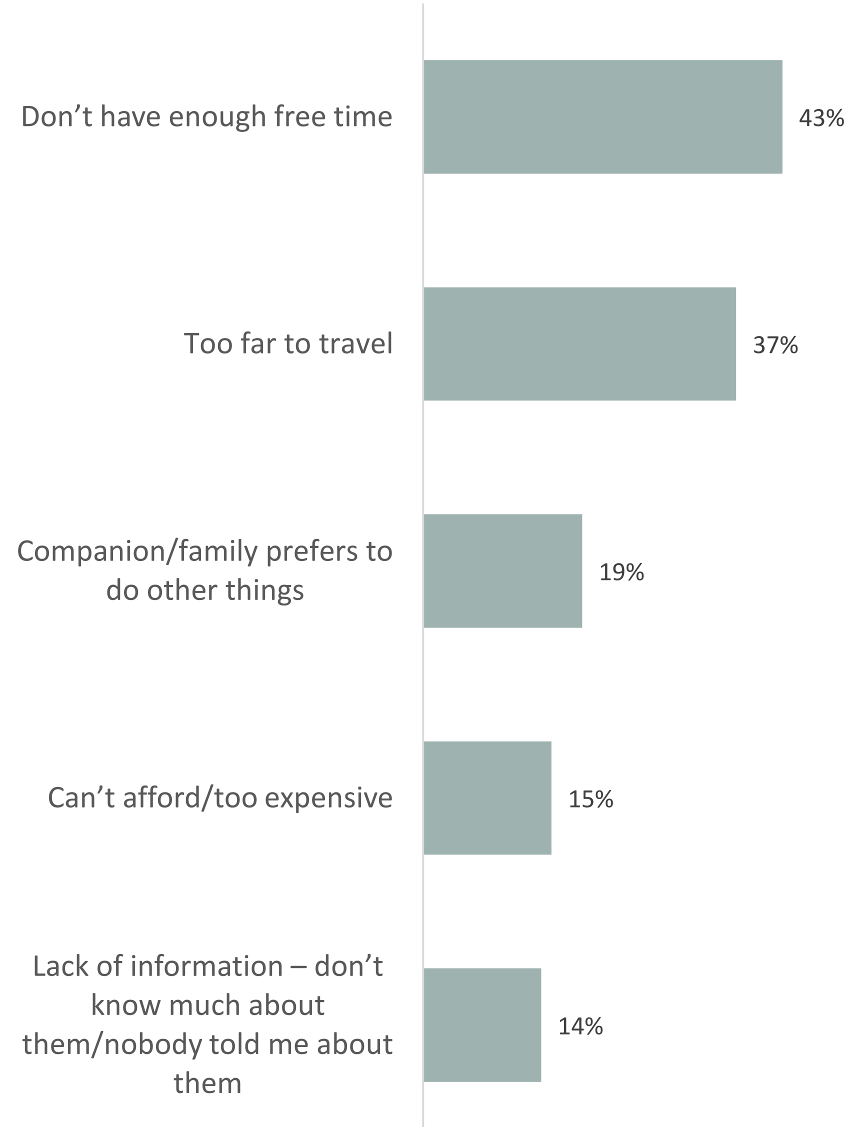


What factors prevent you from returning to or visiting wineries in the Columbia Gorge more frequently?

We asked respondents who didn't live in the Columbia Gorge and who had never visited a winery or who hadn't visited a winery recently what prevented them from going. The largest proportion of Columbia Gorge respondents cited lack of free time, distance, and companion/family preferences as barriers, three factors which unfortunately are mostly beyond the control of regional winery promoters.

Regional winery promoters could, however, address the perception of expense/cost and lack of information, the next most commonly referenced barriers to winery visitation. Spending data from this survey show that Columbia Gorge respondents spent more on tasting fees than Rogue or Umpqua Valley respondents. Columbia Gorge wineries should compare their prices to other regions and evaluate whether changes would be beneficial. Additionally, as a lesser-know wine region compared to the Willamette Valley or wine regions in Washington and California, the Columbia Gorge should devote more resources to raising the area's profile.

Based on other information gathered through this survey, we know that Columbia Gorge respondents were most likely to choose wineries based on word-of-mouth recommendations, free travel guides, and individual wineries' websites. Winery promoters should keep these resources in mind as they work to familiarize more potential winery visitors with the Columbia Gorge. There may be opportunities to target messaging towards "influencers" who can spread the word to their networks. It will also be important ensure that travel guides provide accurate information about wineries. Finally, regional winery promoters should work with individual wineries to ensure their websites are attractive and offer important information like hours of operation and directions in a prominent and easily-accessible location.



Do you have any other suggestions or comments about your experience at wineries in the Columbia Gorge?

Critical comments provided by respondents

Many respondents critiqued the price of wine tastings and wineries' policies around tasting fee waivers. "The policy of two bottle purchase to waive one tasting fee is annoying," one respondent wrote. "There are many good areas with one bottle/tasting fee policy. We will be visiting fewer wineries during our annual trips to the Gorge." Another respondent shared that "compared to many California wineries that I have visited and Texas wineries where I live, the cost of tasting a bit high. $10-$15 would be more reasonable."

A few respondents commented that they wished it were easier to access Columbia Gorge wines where they lived. One respondent shared that at their home in Georgia, "there is little opportunity to buy Gorge wines in restaurants or retail stores." Another respondent requested that Columbia Gorge wineries "make more Gorge wines available in the PDX Metro area."

Some respondents also mentioned that they had difficulty finding Columbia Gorge wineries and wished for better signage and winery listings on Columbia Gorge promotional materials.

Note: *Only 52 people provided critical comments, making the sample size considerably smaller than most of the other results presented in this report.*

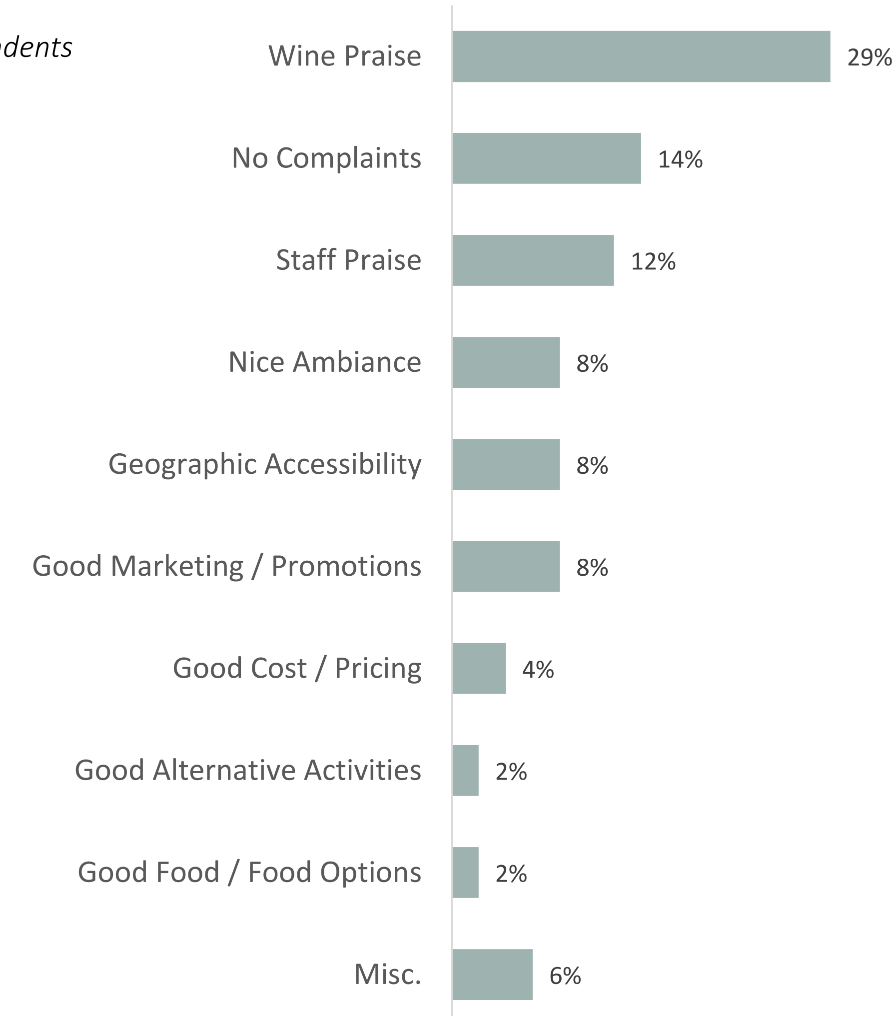
Do you have any other suggestions or comments about your experience at wineries in the Columbia Gorge?

Positive comments and opportunities for improvement provided by respondents

Many respondents commented on the wonderful experience they had visiting Columbia Gorge wineries. As one respondent shared, "this is a stunning wine country and the wines have a unique profile! Some wines are exceptional and I am excited to return to the region as time allows." Another commented, "ALWAYS a fantastic time, the winery people are great hosts and we enjoy most of the wines served...thank you!"

Some respondents shared that they had very positive, helpful interactions with winery staff. Several enjoyed meeting and interacting with winery owners and one respondent said that the "owners/staff are very helpful at recommending other local wineries to visit that may not be as well-publicized or are very new, but are great!!"

Respondents particularly enjoyed Columbia Gorge wineries' atmosphere and hoped that the region could remain "unpretentious, affordable, engaging, and relaxed." "Don't go the Napa Valley route and make the tasting fees higher and higher," one respondent cautioned. "Just take advantage of the beauty of the Columbia River Gorge and make great wine."



Note: *Only 49 people provided positive comments, making the sample size considerably smaller than most of the other results presented in this report.*

Findings

The UO IPRE team's research identified several key findings as important considerations for promoting Oregon's wine tourism industry. These findings emerged through analysis of survey data, review of leisure and tourism literature, industry expert interviews, tourism conference panels, and stakeholder conversations.

We explore the following seven key findings in detail on the following pages:

- **Agritourism & Wine Tourism:** Wine tourism complements Oregon's emerging agritourism sector
- **Visitor Experience:** Winery visitors often prioritize experience over wine
- **Inclusive Experiences:** Offer more inclusive experiences at tasting rooms
- **Millennials:** Focus more marketing attention on Millennials
- **Uniquely Oregon:** Continue to foster and elevate a uniquely Oregon brand
- **Staff & Hospitality:** Winery staff can make or break a positive winery experience
- **Collaboration:** Oregon's wine and tourism industries benefit from collaboration

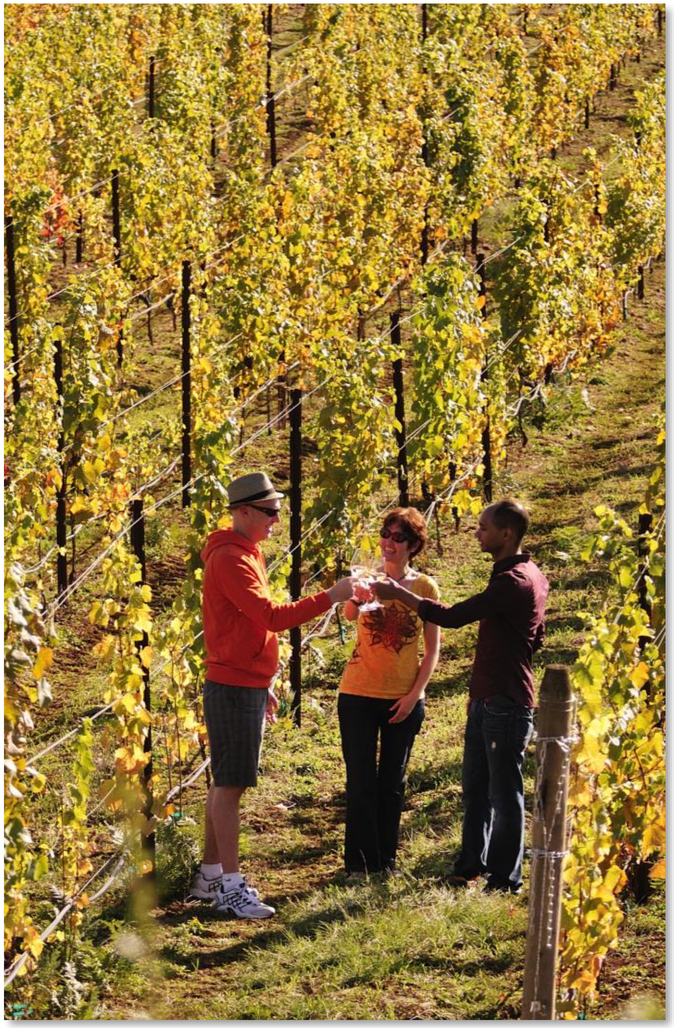
WINE TOURISM COMPLEMENTS OREGON'S EMERGING AGRITOURISM SECTOR

What is agritourism?

Agritourism is defined as an "activity that generates supplemental income for working farms and ranches by connecting their resources and products with visitors" (Travel Oregon, n.d.). This includes activities such as hay rides, school tours, and petting zoos.

Visitors engage in agritourism at wineries when they visit rural places where wine is grown and made, such as a vineyard or winery. Some common categories of wine agritourism include:

- **Education -** wine tastings, winery tours, perhaps with the owner hosting or joining
- **Entertainment** – dinners, live music, festivals, weddings
- **Hospitality** – farm stays, bed and breakfasts, vacation rentals such as Airbnb or VRBO
- **On-farm sales** – wine, bottles, food, merchandise, gifts



The concept of agritourism and the rural connotations associated with agriculture enhance Oregon's reputation with its wine tourists as a rustic, less crowded, more authentic alternative to the glitzy offerings in California's wine country. To build upon this image, Oregon's tourism marketing strategy prioritizes authenticity and artisanship, and in this sense, as aptly put by Travel Southern Oregon Associate Director Bob Hackett, "agritourism embodies the state's brand." Along with these visitor perceptions comes a sense of discovery among Oregon's wine tourists that is distinct from some of the better-known wine regions in California.

Beyond the rustic and authentic identifiers, Oregon is also perceived by visitors as a place of "culinary bounty," as described by Hackett. A 2011 survey of Oregon visitors found that they associated excellent food and beverage with the state (Suzanne Cook Consulting, 2011). Our survey results back up this finding – across categories, more respondents participated in dining out than any other activity.

WINE TOURISM COMPLEMENTS OREGON'S EMERGING AGRITOURISM SECTOR

Agritourism and Sustainability

Sustainability is another dimension that has marketing potential. Sustainable agritourism is defined as the "preservation of the quality of the nature-based environment that includes productive agriculture" and can include both sustainable farming practices as well as educating the public on the benefits of these practices (UC Davis, 2017). With respect to wine, sustainability can include organic certifications, sustainable wine production processes, and any other procedure or application that addresses environmental causes ("Sustainable Oregon Wineries," 2019).

From 2014 to 2015, consumers' willingness to pay more for sustainably sourced products increased from 55% to 66% (Nielsen Survey, 2015). Millennials, in particular, are willing to pay higher prices for sustainably sourced products. Seventy-two percent of millennials reported that they were willing to pay more for products that are sustainably sourced (Nielsen Survey, 2015). Our survey results also show consumers' interest in these products and services. When asked to select the three most important qualities when choosing a winery to visit, 8% to 12% of survey respondents included "Sustainable winegrowing practices or organic production" as one of their top three choices. In particular, out-of-state visitors, millennials, people of color, and those with household incomes below $60,000 indicated sustainability as important to them in their winery selection.

WINERY VISITORS OFTEN PRIORITIZE EXPERIENCE OVER WINE

What is visitor experience?

Winery experience encompasses all of the elements that visitors experience when visiting a winery or tasting room. The concept of the "winescape" details the categories that comprise a visitor's winery experience: setting, atmospherics, wine products, complementary product, signage, layout, and service staff (Thomas et al., 2018). The winery experience can also be divided into the "Four E's" -- education, esthetics, entertainment, and escapism (Quadri-Felitti and Fiore, 2013). Research finds that winery experiences which incorporate the Four E's can lead to stronger memories, positive associations, and increased likelihood of return business. These features in turn inspire destination loyalty among wine visitors and wine consumers.

Wine Consumers Seek and Enjoy Experience – Often More Than Wine

Scholarly research in wine and tourism finds that wine tourism is increasingly being driven by "generalist wine tourists" whose primary motivation for wine tourism isn't only wine, but includes other experiences (Galloway et al., 2008). Our survey results support this. When asked, "What qualities do you seek when selecting a winery?", the most popular quality was natural beauty of the winery property, followed by tasting room ambience and quality. When asked, "What qualities do you enjoy when at a winery?", the top three responses—staff hospitality, facility attractiveness, and food on site—are specifically not wine-related.

Survey respondents said…

"Good wine is important, but to us, the welcoming atmosphere and ability to enjoy a comfortable experience and generally have a small bite to eat brings us back. Also, the ability for the staff to be able to do a bit of 'teaching' when it comes to what I'm tasting is a nice touch. I can then learn more about the wines."

"Spending an afternoon or evening sipping lovely wine in a beautiful tasting room with beautiful grounds; where food is provided and/or you can bring your own picnic and listen to some live music and where the hosts are friendly, warm, welcoming and treat you like family is pure bliss. We enjoy many wineries in the [region] but we visit very frequently because it fulfills all these requirements."

"We appreciate wineries that have some nice food offerings because, for us, wine is meant to be enjoyed with food. We drink wine every day but almost always with food."

OFFER MORE INCLUSIVE EXPERIENCES AT TASTING ROOMS

The Traditional Market for Winery Advertising

Based on review of wine tourism materials and prior wine tourism marketing research, the traditional market for winery advertising tends to be somewhat narrow, largely focusing on white, Baby Boomer, high-income, and high-frequency consumers of high-end wine. By focusing on this group, wine tourism advertising essentially only speaks to wine knowledgeable "enthusiasts," as defined by a 2007 wine study of 10,000 consumers (Caputo, 2008).

People of Color

Academic research in the field of leisure has identified a model of psychological constraints which impede or prevent participation in leisure activities by people of color. This model asserts that low levels of participation in leisure activity can be caused by key barriers such as anxiety and perceived self-skill (Cho et al., 2017). Thus, by excluding people of color from marketing, people of color have feelings of non-belonging, and will then self-exclude from the market.

In addition, not only does this kind of marketing exclude those who don't feel they belong to the targeted group, it also excludes consumers who value diversity. American Millennials, in particular, are suspicious of marketing that is not inclusive of a variety of races and genders, partially because one-third of their generation is non-white, and partially because they were taught to value diversity at an early age (Thach and Olsen, 2006).

OFFER MORE INCLUSIVE EXPERIENCES AT TASTING ROOMS

Lower Frequency and Lower Income Wine Consumers

These two groups may spend less per bottle than higher income or higher frequency wine consumers, but “overwhelmed” and “savvy shopper” consumers together comprise 28% of the wine purchase market, according to a 2007 wine consumption study (Caputo, 2008). This study followed an earlier 2005 study in which Constellation Wines US identified six consumer segments: Enthusiasts, Image Seekers, Savvy Shoppers, Traditionalists, Satisfied Sippers, and Overwhelmed (see Figure A).

The “overwhelmed” consumers actually enjoy drinking wine, but they don’t know what to buy, and often feel frustrated by lack of guidance and confused by lack of information (Caputo, 2008). These feelings of confusion and frustrating can result in overwhelmed consumers leaving the retail setting without purchasing any wine at all: 23% of wine consumers are overwhelmed (the highest percentage of consumers among the different segments), but only represent 13% of wine purchases.

Consumers identified in the study as “savvy shoppers” enjoy shopping for and discovering new wine but are cost conscious in their purchasing habits. This results in behavior such as use of coupons, pursuit of specials and sales, purchasing wine from different stores in pursuit of the best deals, and generally defaulting to house wine when dining out, due to price. These consumers represent 15% of wine consumers, and purchase 15% of the wine market share.

Both of these groups may overlap heavily with “generalist wine tourists,” whose primary motivation for wine tourism isn’t wine per se, but rather experiential factors beyond the wine (Galloway et al., 2008). Wine tourism research asserts that wine tourism is increasingly being driven by this type of wine tourist (Galloway et al., 2008).

Wine tourism businesses and organizations should be aware of the lower income and lower frequency wine consumers who still enjoy wine tourism. Excluding these groups from marketing or tasting room considerations cuts off a large portion of the market and limits reach.

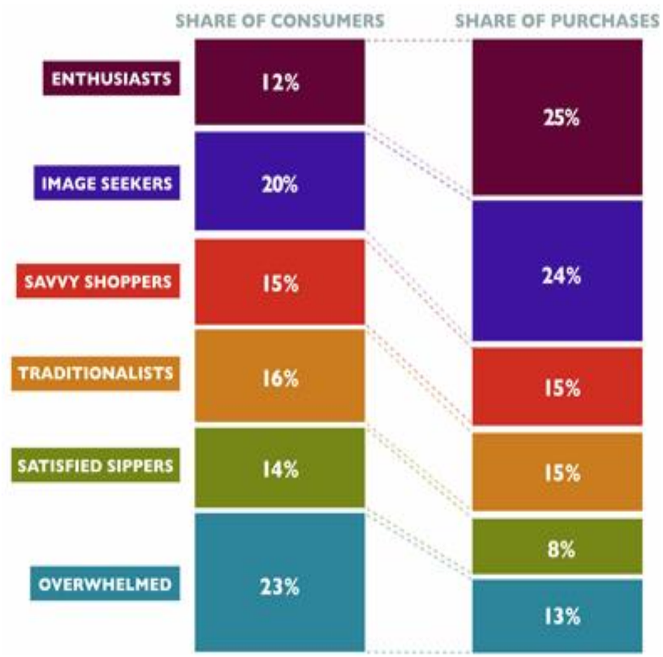


Figure A. Consumer segments identified in a 2005 study of 3,500 wine drinkers by Constellation Wines US

Survey respondents said…

“I’m only looking for mutual respect and not be to talked down to regarding wine knowledge, I want to learn but not feel dumb for asking a question.”

OFFER MORE INCLUSIVE EXPERIENCES AT TASTING ROOMS

Opportunities for Inclusion

To address accidental exclusion of groups when marketing and designing wine tourism experiences, here are four places to start:

1. **Educate:** Provide tasting notes and pairings on wine bottles and offer welcoming wine education geared towards beginners at wineries (Caputo, 2008).
2. **Expand beyond the tasting room:** Offer opportunities to enjoy wineries beyond the tasting and purchase of wine. These may include educational events, food and wine pairings, farm-to-table dinners, live music, festivals, and agritourism activities such as vineyard tours and farm stays. This helps families, consumers with less wine knowledge, people of color, and anyone else who might historically have felt uncomfortable or unrecognized by the wine industry to feel welcome and interested in wine tourism.
3. **Diversify depictions in advertising:** Depict a diversity of races, ages, and incomes in advertisements. This creates a more inclusive environment for all, reducing the psychological constraints that might be felt by people of color, Millennials, lower income or lower frequency wine drinkers, and anyone else who traditionally hasn't been represented in wine marketing.
4. **Diversify price-points:** Market wine to lower income markets by offering a lower priced wine. This can serve as a bridge to future high-end consumers.

FOCUS MORE MARKETING ATTENTION ON MILLENNIALS

Generation Definitions

Millennials are the generation born between 1981 and 1996 (Dimock, 2019), following Generation X and preceding Generation Z. At the time of this report, Millennials are between the ages of 23 and 38 years old, making them good candidates for wine tourism.

Why target Millennials

At 79 million, Millennials are now a larger consumer group than Baby Boomers (75 million), despite the older generation's notorious size (Thach and Olsen, 2006). Additionally, Millennials already spend more on wine than Generation X, and this will only grow as their incomes increase. They currently represent 42% of wine purchases, a relatively large market share that continues to grow (Neal, n.d., "How millennials…," 2017).

Beyond their large market share, Millennials are also relatively young in their wine-purchasing lives. To continue to be relevant, the wine industry must consider younger markets beyond their loyal Baby Boomers (Carlsen, 2004). At the 2019 Oregon Governor's Conference on Tourism, Oregon winemakers noted this fact, with one panelist from a small winery describing the realization that the average age for her winery's wine club members was 86 years old—and their age was causing them to slow down their wine consumption!

Panelists at the same event also pointed out that Millennials are not adopting wine as much as anticipated, and listed some possible explanations, including a focus on health and wellness, a downturn in "luxury drinking," and the competing cannabis and craft beer markets.

Nontraditional

Millennials are interested in new and innovative approaches to wine. Not constrained by tradition or formality, they welcome novel winery experiences and approaches to wine production. This manifests in an interest in organic and sustainable wines (Fermentation Wine Blog, n.d.), cans of wine (Beyond the Cellar Door, 2019; Fermentation Wine Blog, n.d.), rosé and other obscure varietals ("How millennials…," 2017), wine pairings with cannabis (Beyond the Cellar Door, 2019), and other adventurous approaches to wine. There is a sense that the longstanding inclination for formality in the wine industry is gone, having been replaced by approachability and novelty (Beyond the Cellar Door, 2019).

FOCUS MORE MARKETING ATTENTION ON MILLENNIALS

Social Media

In this vein, Millennials are less brand-loyal and less influenced by traditional wine marketing and markers of quality such as wine magazines and expert ratings (UNCORKD, 2018). They are more likely to be swayed by social media influencers than billboards. Interestingly, they are the only demographic that we examined who did not use Facebook as their social media site of choice when searching for wineries. Instead, Millennials preferred Instagram.

Experience

The Millennial-born phenomenon of FOMO (fear of missing out) likely stems from Instagram and other social media sites. Somewhat ironically, the Millennial interest in performing a perfect life on Instagram dovetails perfectly with the Millennial interest in authenticity for creating a desirable wine tasting experience. That is, they seek an experience that is both meaningful and scenic—qualities which lend themselves to enjoying an authentic experience, as well as snapping a nice shot for social media. Researchers have found that Millennials pursue winery experiences when there is an experiential component (Wine-Searcher, n.d.)—their expectation is not only to taste wine, but to experience something new and interesting while visiting a winery. Similarly, expert panelists at the 2019 Oregon Governor's Conference on Tourism noted Millennials' interest in tasting room experience, with winemakers describing the lengths to which they go in pursuit of the Millennial consumer. These range from wine dinners, to adult pong and faux beach parties with imported sand, to an open-door policy that creates an ambience jokingly referred to as a state park.

Authenticity

The preference of influencers over traditional marketing can be attributed in part to the extremely high value that Millennials place on authenticity. This value also manifests when it comes to the content of the ad, not just the medium in which it is presented. A 2006 journal article conducted a "market segment analysis to target young adult drinkers" (Thach and Olsen, 2006). This study found that Millennials are suspicious of marketing that is not inclusive of a variety of races and genders. The authors attribute this partially to the generation's diversity (one-third of American Millennials are non-white), and partially to the fact that Millennials were taught to value diversity at an early age.

Survey respondents said…

"Being able to bring friends out wine tasting and helping them explore their palette is what I enjoy most. But sometimes it's difficult when the winery isn't welcoming to younger individuals. I'm 28 and enjoy exploring varietals and showing people the fantastic wines of Oregon, but often wineries cater towards older demographics and aren't as welcoming to our group."

CONTINUE TO FOSTER AND ELEVATE A UNIQUELY OREGON BRAND

Innovative

Oregon winemakers take great pride in both their state and their wine. Oregon's reputation for high quality wines gives winemakers solid footing in the industry, while the state's love of innovation and artisan craftsmanship makes it an exciting place to experiment. Panelists on a panel at the 2019 Oregon Governor's Conference on Tourism noted that Oregon winemakers think outside the box, naming a sense of authenticity and discovery in the state's wine industry (Beyond the Cellar Door, 2019).

Undiscovered

When asked about the top trends in the Oregon wine industry, expert panelists named an exodus of wine professionals moving from California to Oregon (Beyond the Cellar Door, 2019). The same trend holds true among consumers, as well. Respondents to our survey overwhelmingly agreed that they prefer an Oregon experience over the wine-tasting experiences offered in Napa and Sonoma Valleys in California. In open-ended responses, wine visitors often noted that California wine regions are too crowded, too corporate, too expensive, and too pretentious. In contrast, survey respondents enjoy that Oregon's wine regions are more affordable, easier to visit, have a "small town allure," and are generally enjoyable and pleasurable. Many respondents implored Oregon's wine industry to stay true to these qualities and avoid becoming like commercial California wine destinations.

Quality

Oregon winemakers emphasized the importance of buying wine that is made with Oregon grapes as well as in Oregon production facilities (Beyond the Cellar Door, 2019). According to these experts, due to Oregon's reputation for quality, some winemakers have begun purchasing Oregon grapes and processing them across state lines, where production standards are more relaxed. This may lower costs, but can also reduce quality and dilute the hard-earned reputation of Oregon wines—wines processed across state lines that use 100% Oregon grapes are allowed to brand their wine as "Oregon wine" (Zimberoff, 2019).

Survey respondents said…

"Please do not try to be like Napa/Sonoma, regions that became too upscale for most people who enjoy wine but who do not enjoy being pretentious. Thanks!"

"We have felt the experience is generally very good - especially at smaller wineries. We prefer that to the "corporate" wineries in areas like Napa."

"We love the Rogue Valley wineries and are members of several. Always welcoming. We enjoy the small mom and pop venues where you actually can sit and converse with the owners. Some of our wineries have gotten too big – Napa style – so crowded and expensive. They have lost their small-town allure."

WINERY STAFF CAN MAKE OR BREAK A POSITIVE WINERY EXPERIENCE

Consumers Prioritize Staff Interactions When Rating Their Experience

Our respondents repeatedly emphasized the importance of winery staff's hospitality and knowledge in creating an enjoyable experience for their winery visit. When asked, "What experience do you enjoy when at a winery?" winery staff hospitality and friendliness was the top response by a large margin. Additionally, out of the 10 multiple choice options to the question of what experiences respondents enjoyed at a winery, "presentation and wine knowledge of the host" ranked between fifth and second depending on region. When taken together, these results show how imperative it is that winery staff be welcoming and well-trained.

Similarly, when asked the open-ended question, "Do you have other suggestions/comments about your experience at wineries in the region and how to make it better?" respondents often mentioned winery staff and owners as pivotal to their enjoyment of a region's wineries, one of the most frequent themes in comments provided.

Survey respondents said…

"The Umpqua Valley is where my household discovered wine and fell in love with it 7 years ago. I cannot emphasize enough how much the hospitality and kindness of the owners/winemakers have contributed to our enjoyment. Along with the quality wines they produce, the people are largely the main reason we keep returning and have joined a few wine clubs."

"Biggest thing for a winery to have in my mind is personable staff. If I don't like the staff and they don't make it an enjoyable experience, I won't go back. I usually can find at least one wine I can enjoy at every winery I go to. So staff can be a deal breaker for me."

WINERY STAFF CAN MAKE OR BREAK A POSITIVE WINERY EXPERIENCE

Producers Are Responding

Winemakers and other wine industry professionals are recognizing the importance of hospitality at their wineries. At the 2019 Oregon Governor's Conference on Tourism, expert panelists from Oregon's wine industry identified training and education of frontline staff as one of the top two trends in the Oregon wine industry (Beyond the Cellar Door, 2019). Emphasizing that winery staff "need to know their wine," one winemaker explained how their winery solved the problem by implementing a robust cross-training program. Winery staff participate in every aspect of wine production, including bottling, sorting, weed whacking, and driving a tractor. This creates a level of authenticity from the staff's intense familiarity with the wines they're serving, ensuring that they really know the wine. Another panelist noted that their winery had added a "training ambassador" position to ensure that staff are well-trained.

Survey respondents said…

"The wineries that learn members by name is huge to keeping members coming back. It makes you feel like family not just a number."

"The most important things for my wife and I are friendly and knowledgeable staff. Slipping in an extra taste without increasing the tasting fee is an added bonus. It makes us feel special. I think the key is for the hosts to create a relationship with the patrons as quickly as possible. Wine buyers appreciate being made to feel special."

"Wineries that have a clear story about their wine making are important. Which means that the owners/staff must be well educated on their winemaking process and what might make their process/focus unique and be willing to share that information with the visitor."

OREGON'S WINE AND TOURISM INDUSTRIES BENEFIT FROM COLLABORATION

Collaboration in Oregon

Oregon's wine industry benefits most when producers and regional promoters take advantage of opportunities to collaborate around marketing and brand development. In Oregon, there are many examples of multi-party collaborations that have elevated both Oregon's wine and tourism sectors. Such partnerships, particularly between wine industry professionals and tourism professionals, should be cultivated and leveraged as Oregon gains increasing recognition for its high-quality wines, diverse landscapes, and remarkable travel destinations.

Clusters

The effective marketing of agricultural clusters/regions as tourist destinations can be a mutually beneficial endeavor. Some examples in Oregon include the Fruit Loop in Hood River County, the four regional farm loops that together comprise the Oregon Farm Loop (a project of the Oregon Agritourism Project), and the Oregon Food Trails (operated by Travel Oregon).

Similarly, wine trails and clusters are popular ways to highlight regional wineries and vineyards. Interestingly, the Oregon Wine Board promotes an "Oregon Wine Trail" that is in fact a traveling wine tasting event, bringing Oregon wines to consumers, rather than requiring consumers to visit wineries. The Oregon Wine Board's "Oregon Wine Touring Guide," a free printed publication, also serves to promote wine tourism by highlighting wineries in Oregon's wine touring regions.

Studies of wine routes outside of Oregon have found that stakeholder participation and coordination are key elements to developing a successful wine route (Giuseppina Carrà et al). Economist Michael E. Porter's cluster model refers to "geographic concentrations of interconnected companies and institutions in a particular field" (1998). In Porter's model, when one firm in a cluster prospers, so do its cluster neighbors. This theory can explain the popularity of wine region marketing and should further encourage cooperation among neighboring wineries.

OREGON'S WINE AND TOURISM INDUSTRIES BENEFIT FROM COLLABORATION

Cross-Producer and Cross-Regional Collaboration

Many Oregon wine producers deeply value collaboration in the Oregon wine industry. Oregon Solidarity wines were created in response to a crisis that occurred for Rogue Valley winegrowers during the 2018 harvest season. A week before harvest, Rogue Valley growers' grape contracts were canceled by an out-of-state winery, who attributed their cancellation to smoke taint as a result of the summer season's wildfires. The Willamette Valley Vineyards and King Estate Winery, two Willamette Valley wineries, teamed up to harvest and purchase as many of the abandoned grapes as possible, then used the resulting grapes to create three "Oregon Solidarity" wines. In addition, according to the Oregon Solidarity website, "the net sale proceeds from the wines will be donated to the Rogue Valley Vintners to help support vineyards in the region" (2019). Oregon winemakers describe this response as a "rally together to help" (Beyond the Cellar Door, 2019).

Courtesy of Willamette Valley Vineyards

Courtesy of Travel Oregon, https://industry.traveloregon.com/resources/news-detail/oregon-solidarity-wines/

VISITOR PERSONAS

This section provides 19 visitor personas to highlight the behaviors and preferences of various segments of survey respondents. Each persona reports the following key factors:

- **Emerging Demographic Segments** – How many respondents fell into the emerging winery visitor markets of Millennials, lower income earners, and people of color?
- **Wine Attitudes & Behaviors –** How many respondents were high-frequency and high-end wine consumers? What were the top factors that drew respondents to wineries?
- **Trip Behaviors & Spending –** How many respondents were primarily visiting wineries and how many wineries did they visit? How many spent the night? How much did they purchase and spend?
- **Resources Used to Select Winery –** What were the top resources respondents used to select which wineries to visit?

We highlight the following 19 visitor segments, chosen because they represent groups that may be of particular interest to winery travel promoters:

RESIDENCY

- Oregon residents
- Out-of-state residents
- Rogue Valley locals
- Rogue Valley visitors
- Umpqua Valley locals
- Umpqua Valley visitors
- Columbia Gorge locals
- Columbia Gorge visitors

GENERATION

- Millennials
- Gen Xers
- Baby Boomers

TRIP ACTIVITIES

- Winery enthusiasts
- Festival attendees
- Outdoor enthusiasts
- Visiting family/friends

TRIP TYPE

- Day trippers
- Paid lodgers

EMERGING GROUPS

- People of color
- Visitors with lower incomes

OREGON RESIDENTS

(n=3,023)

Respondents whose primary residence is in Oregon

Emerging Demographic Segments

Age 21-34	Household Income <$60k	People of Color
8%	14%	11%

Wine Attitudes & Behaviors

Consume wine at least a few times per week: **81%**

Purchase wine costing $20 or more at least monthly: **32%**

When selecting a winery, they seek:

Natural beauty of property/setting	50%
Quality of the tasting room ambiance	46%
Familiar wines	32%

Once at a winery, they most enjoy:

Friendliness/hospitality of staff	68%
Attractiveness of facility	38%
Ambiance/social atmosphere	37%

Trip Behaviors & Spending

Trip Characteristics & Spending

- **55%** Visiting wineries was primary trip purpose
- **20%** Stayed at least 1 night as part of trip
- **2.5** Average number of tasting rooms visited during trip
- **6.5** Average number of bottles purchased during trip
- **$152** Average spend on wine per party per day
- **$201** Average spend on non-wine activities per party per day

Other activities they participated in during trip:

Dining	Shopping	Outdoor Recreation
70%	28%	27%

Resources Used to Select Winery

Word of Mouth	Winery Website	Wine Publication/ Magazine
54%	18%	13%

OUT-OF-STATE RESIDENTS

(n=873)

Respondents whose primary residence in a US state other than Oregon

Emerging Demographic Segments

Age 21-34	Household Income <$60k	People of Color
6%	10%	13%

Wine Attitudes & Behaviors

Consume wine at least a few times per week: **83%**

Purchase wine costing $20 or more at least monthly: **35%**

When selecting a winery, they seek:

Natural beauty of property/setting	46%
Quality of the tasting room ambiance	41%
Opportunity to discover new wines	38%

Once at a winery, they most enjoy:

Friendliness/hospitality of staff	66%
Presentation/knowledge of host	44%
Attractiveness of facility	35%

Trip Behaviors & Spending

Trip Characteristics & Spending

26% Visiting wineries was primary trip purpose

47% Stayed at least 1 night as part of trip

3.3 Average number of tasting rooms visited during trip

10 Average number of bottles purchased during trip

$190 Average spend on wine per party per day

$366 Average spend on non-wine activities per party per day

Other activities they participated in during trip:

Dining	Shopping	Outdoor Recreation
80%	46%	33%

Resources Used to Select Winery

Word of Mouth	Free Guidebook	Winery Website
31%	17%	14%

ROGUE VALLEY LOCALS

(n=1,831)

Respondents who traveled 50 miles or less to visit a winery in the Rogue Valley

Emerging Demographic Segments

Age 21-34	Household Income <$60k	People of Color
6%	14%	9%

Wine Attitudes & Behaviors

Consume wine at least a few times per week: **81%**

Purchase wine costing $20 or more at least monthly: **31%**

When selecting a winery, they seek:

Natural beauty of property/setting	56%
Quality of the tasting room ambiance	52%
Familiar wines	32%

Once at a winery, they most enjoy:

Friendliness/hospitality of staff	67%
Food on site	45%
Attractiveness of facility	44%

Trip Behaviors & Spending

Trip Characteristics & Spending

- **67%** Visiting wineries was primary trip purpose
- **3%** Stayed at least 1 night as part of trip
- **2.2** Average number of tasting rooms visited during trip
- **4.7** Average number of bottles purchased during trip
- **$97** Average spend on wine per party per day
- **$91** Average spend on non-wine activities per party per day

Other activities they participated in during trip:

Dining	Shopping	Special Event/ Festival
69%	29%	27%

Resources Used to Select Winery

Word of Mouth	Winery Website	Wine Publication/ Magazine
57%	15%	12%

ROGUE VALLEY VISITORS

(n=562)

Respondents who traveled more than 50 miles to visit a winery in the Rogue Valley

VISITOR PERSONAS

RESIDENCY

Emerging Demographic Segments

Age 21-34	Household Income <$60k	People of Color
7%	14%	10%

Wine Attitudes & Behaviors

Consume wine at least a few times per week: **81%**

Purchase wine costing $20 or more at least monthly: **33%**

When selecting a winery, they seek:

Natural beauty of property/setting	45%
Quality of the tasting room ambiance	44%
Opportunity to discover new wines	32%

Once at a winery, they most enjoy:

Friendliness/hospitality of staff	68%
Presentation/knowledge of host	42%
Attractiveness of facility	36%

Trip Behaviors & Spending

Trip Characteristics & Spending

- **31%** Visiting wineries was primary trip purpose
- **63%** Stayed at least 1 night as part of trip
- **3.1** Average number of tasting rooms visited during trip
- **9.6** Average number of bottles purchased during trip
- **$138** Average spend on wine per party per day
- **$207** Average spend on non-wine activities per party per day

Other activities they participated in during trip:

Dining	Shopping	Outdoor Rec & Special Event/ Festival
72%	41%	31%

Resources Used to Select Winery

Word of Mouth	Winery Website	Wine Publication/ Magazine
58%	20%	14%

UMPQUA VALLEY LOCALS

(n=221)

Respondents who traveled 50 miles or less to visit a winery in the Umpqua Valley

Emerging Demographic Segments

Age 21-34	Household Income <$60k	People of Color
9%	17%	10%

Wine Attitudes & Behaviors

Consume wine at least a few times per week: **80%**

Purchase wine costing $20 or more at least monthly: **33%**

When selecting a winery, they seek:

Quality of the tasting room ambiance	47%
Natural beauty of property/setting	38%
Familiar wines	37%

Once at a winery, they most enjoy:

Friendliness/hospitality of staff	75%
Ambiance/social atmosphere	41%
Presentation/knowledge of host	38%

Trip Behaviors & Spending

Trip Characteristics & Spending

- **69%** Visiting wineries was primary trip purpose
- **4%** Stayed at least 1 night as part of trip
- **2.2** Average number of tasting rooms visited during trip
- **6.0** Average number of bottles purchased during trip
- **$122** Average spend on wine per party per day
- **$74** Average spend on non-wine activities per party per day

Other activities they participated in during trip:

Dining	Brewery/Cidery/Distillery	Outdoor Recreation
66%	31%	25%

Resources Used to Select Winery

Word of Mouth	Road Sign or Billboard	Free Guidebook
51%	10%	10%

UMPQUA VALLEY VISITORS

(n=284)

Respondents who traveled more than 50 miles to visit a winery in the Umpqua Valley

VISITOR PERSONAS

RESIDENCY

Emerging Demographic Segments

Age 21-34	Household Income <$60k	People of Color
4%	13%	9%

Wine Attitudes & Behaviors

Consume wine at least a few times per week: **84%**

Purchase wine costing $20 or more at least monthly: **36%**

When selecting a winery, they seek:

Familiar wines	39%
Quality of the tasting room ambiance	37%
Natural beauty of property/setting	37%

Once at a winery, they most enjoy:

Friendliness/hospitality of staff	76%
Presentation/knowledge of host	44%
Ambiance/social atmosphere	33%

Trip Behaviors & Spending

Trip Characteristics & Spending

44% Visiting wineries was primary trip purpose

47% Stayed at least 1 night as part of trip

3.0 Average number of tasting rooms visited during trip

10.4 Average number of bottles purchased during trip

$168 Average spend on wine per party per day

$148 Average spend on non-wine activities per party per day

Other activities they participated in during trip:

Dining	Shopping	Outdoor Recreation
75%	24%	24%

Resources Used to Select Winery

Word of Mouth	Free Guidebook	Winery Website
50%	22%	21%

COLUMBIA GORGE LOCALS

(n=117)

Respondents who traveled 50 miles or less to visit a winery in the Columbia Gorge

Emerging Demographic Segments

Age 21-34	Household Income <$60k	People of Color
17%	9%	6%

Wine Attitudes & Behaviors

Consume wine at least a few times per week: **70%**

Purchase wine costing $20 or more at least monthly: **28%**

When selecting a winery, they seek:

Natural beauty of property/setting	**60%**
Quality of the tasting room ambiance	**47%**
Familiar wines	**34%**

Once at a winery, they most enjoy:

Friendliness/hospitality of staff	**67%**
Ambiance/social atmosphere	**55%**
Attractiveness of facility	**39%**

Trip Behaviors & Spending

Trip Characteristics & Spending

60% Visiting wineries was primary trip purpose

9% Stayed at least 1 night as part of trip

2.1 Average number of tasting rooms visited during trip

3.7 Average number of bottles purchased during trip

$125 Average spend on wine per party per day

$104 Average spend on non-wine activities per party per day

Other activities they participated in during trip:

Dining	Outdoor Recreation	Shopping
65%	34%	29%

Resources Used to Select Winery

Word of Mouth	Winery Website	Free Guidebook
46%	18%	12%

COLUMBIA GORGE VISITORS

(n=369)

Respondents who traveled more than 50 miles to visit a winery in the Columbia Gorge

Emerging Demographic Segments

Age 21-34	Household Income <$60k	People of Color
12%	14%	10%

Wine Attitudes & Behaviors

Consume wine at least a few times per week: **81%**

Purchase wine costing $20 or more at least monthly: **29%**

When selecting a winery, they seek:

Quality of the tasting room ambiance	47%
Natural beauty of property/setting	44%
Opportunity to discover new wines	29%

Once at a winery, they most enjoy:

Friendliness/hospitality of staff	69%
Attractiveness of facility	40%
Presentation/knowledge of host	39%

Trip Behaviors & Spending

Trip Characteristics & Spending

63% Visiting wineries was primary trip purpose

29% Stayed at least 1 night as part of trip

2.6 Average number of tasting rooms visited during trip

5.6 Average number of bottles purchased during trip

$143 Average spend on wine per party per day

$155 Average spend on non-wine activities per party per day

Other activities they participated in during trip:

Dining	Brewery/Cidery/Distillery	Outdoor Recreation
69%	31%	29%

Resources Used to Select Winery

Word of Mouth	Winery Website	Free Guidebook
44%	17%	16%

MILLENNIAL

(n=322)
Respondents who are ages 21-34

Emerging Demographic Segments

Age 21-34	Household Income <$60k	People of Color
100%	23%	13%

Wine Attitudes & Behaviors

Consume wine at least a few times per week: **67%**

Purchase wine costing $20 or more at least monthly: **32%**

When selecting a winery, they seek:

Natural beauty of property/setting	60%
Quality of the tasting room ambiance	45%
Affordability	35%

Once at a winery, they most enjoy:

Friendliness/hospitality of staff	61%
Attractiveness of facility	43%
Ambiance/social atmosphere	43%

Trip Behaviors & Spending

Trip Characteristics & Spending

- **55%** Visiting wineries was primary trip purpose
- **24%** Stayed at least 1 night as part of trip
- **2.6** Average number of tasting rooms visited during trip
- **4.9** Average number of bottles purchased during trip
- **$111** Average spend on wine per party per day
- **$141** Average spend on non-wine activities per party per day

Other activities they participated in during trip:

Dining	Brewery/Cidery/ Distillery	Outdoor Recreation
70%	38%	38%

Resources Used to Select Winery

Word of Mouth	Winery Website	Mapping Website
55%	15%	14%

GEN Xers

(n=1,190)

Respondents who are ages 35-54

VISITOR PERSONAS

GENERATION

Emerging Demographic Segments

Age 21-34	Household Income <$60k	People of Color
n/a	12%	12%

Wine Attitudes & Behaviors

Consume wine at least a few times per week: **75%**

Purchase wine costing $20 or more at least monthly: **35%**

When selecting a winery, they seek:

Natural beauty of property/setting	51%
Quality of the tasting room ambiance	47%
Opportunity to discover new wines	29%

Once at a winery, they most enjoy:

Friendliness/hospitality of staff	68%
Attractiveness of facility	37%
Ambiance/social atmosphere	36%

Trip Behaviors & Spending

Trip Characteristics & Spending

46% Visiting wineries was primary trip purpose

29% Stayed at least 1 night as part of trip

2.6 Average number of tasting rooms visited during trip

7.6 Average number of bottles purchased during trip

$126 Average spend on wine per party per day

$146 Average spend on non-wine activities per party per day

Other activities they participated in during trip:

Dining	Outdoor Recreation	Brewery/Cidery/ Distillery
72%	37%	33%

Resources Used to Select Winery

Word of Mouth	Winery Website	Free Guidebook
54%	18%	13%

BABY BOOMERS

(n=2,621)

Respondents who are ages 55 and older

Emerging Demographic Segments

Age 21-34	Household Income <$60k	People of Color
n/a	13%	10%

Wine Attitudes & Behaviors

Consume wine at least a few times per week: **87%**

Purchase wine costing $20 or more at least monthly: **32%**

When selecting a winery, they seek:

Natural beauty of property/setting	46%
Quality of the tasting room ambiance	44%
Familiar wines	34%

Once at a winery, they most enjoy:

Friendliness/hospitality of staff	68%
Presentation/knowledge of host	39%
Attractiveness of facility	36%

Trip Behaviors & Spending

Trip Characteristics & Spending

48% Visiting wineries was primary trip purpose

24% Stayed at least 1 night as part of trip

2.6 Average number of tasting rooms visited during trip

7.6 Average number of bottles purchased during trip

$126 Average spend on wine per party per day

$146 Average spend on non-wine activities per party per day

Other activities they participated in during trip:

Dining	Shopping	Special Event/ Festival
74%	33%	28%

Resources Used to Select Winery

Word of Mouth	Winery Website	Wine Publication/ Magazine
51%	21%	16%

DAY TRIPPERS

(n=2,806)

Respondents who did not spend the night

Emerging Demographic Segments

Age 21-34	Household Income <$60k	People of Color
7%	14%	9%

Wine Attitudes & Behaviors

Consume wine at least a few times per week: **81%**

Purchase wine costing $20 or more at least monthly: **31%**

When selecting a winery, they seek:

Natural beauty of property/setting	52%
Quality of the tasting room ambiance	49%
Familiar wines	33%

Once at a winery, they most enjoy:

Friendliness/hospitality of staff	69%
Attractiveness of facility	40%
Ambiance/social atmosphere	40%

Trip Behaviors & Spending

Trip Characteristics & Spending

- **66%** Visiting wineries was primary trip purpose
- **n/a** Stayed at least 1 night as part of trip
- **2.3** Average number of tasting rooms visited during trip
- **5.3** Average number of bottles purchased during trip
- **$112** Average spend on wine per party per day
- **$95** Average spend on non-wine activities per party per day

Other activities they participated in during trip:

Dining	Shopping	Outdoor Recreation
68%	27%	25%

Resources Used to Select Winery

Word of Mouth	Winery Website	Wine Publication/ Magazine
54%	17%	12%

PAID LODGERS

(n=845)

Respondents who spent the night and paid for their lodging

Emerging Demographic Segments

Age 21-34	Household Income <$60k	People of Color
6%	9%	11%

Wine Attitudes & Behaviors

Consume wine at least a few times per week: **84%**

Purchase wine costing $20 or more at least monthly: **36%**

When selecting a winery, they seek:

Quality of the tasting room ambiance	44%
Natural beauty of property/setting	43%
Opportunity to discover new wines	37%

Once at a winery, they most enjoy:

Friendliness/hospitality of staff	74%
Presentation/knowledge of host	43%
Attractiveness of facility	35%

Trip Behaviors & Spending

Trip Characteristics & Spending

44% Visiting wineries was primary trip purpose

100% Stayed at least 1 night as part of trip

3.7 Average number of tasting rooms visited during trip

11.8 Average number of bottles purchased during trip

$169 Average spend on wine per party per day

$324 Average spend on non-wine activities per party per day

Other activities they participated in during trip:

Dining	Shopping	Special Event/ Festival
84%	40%	32%

Resources Used to Select Winery

Word of Mouth	Free Guidebook	Winery Website
46%	26%	25%

WINERY ENTHUIASTS

(n=2,333)

Respondents who said the primary purpose of their trip was to visit wineries

VISITOR PERSONAS

TRIP ACTIVITIES

Emerging Demographic Segments

Age 21-34	Household Income <$60k	People of Color
8%	13%	9%

Wine Attitudes & Behaviors

Consume wine at least a few times per week: **84%**

Purchase wine costing $20 or more at least monthly: **35%**

When selecting a winery, they seek:

Natural beauty of property/setting	49%
Quality of the tasting room ambiance	48%
Familiar wines	33%

Once at a winery, they most enjoy:

Friendliness/hospitality of staff	71%
Attractiveness of facility	39%
Ambiance/social atmosphere	39%

Trip Behaviors & Spending

Trip Characteristics & Spending

100% Visiting wineries was primary trip purpose

20% Stayed at least 1 night as part of trip

2.8 Average number of tasting rooms visited during trip

7.0 Average number of bottles purchased during trip

$129 Average spend on wine per party per day

$130 Average spend on non-wine activities per party per day

Other activities they participated in during trip:

Dining	Shopping	Outdoor Recreation
74%	30%	26%

Resources Used to Select Winery

Word of Mouth	Winery Website	Wine Publication/ Magazine
54%	20%	15%

FESTIVAL ATTENDEES

(n=145)

Respondents who attended a festival or special event as part of their trip

Emerging Demographic Segments

Age 21-34	Household Income <$60k	People of Color
6%	15%	14%

Wine Attitudes & Behaviors

Consume wine at least a few times per week: **86%**

Purchase wine costing $20 or more at least monthly: **28%**

When selecting a winery, they seek:

Natural beauty of property/setting	61%
Quality of the tasting room ambiance	44%
Affordability	27%

Once at a winery, they most enjoy:

Friendliness/hospitality of staff	63%
Attractiveness of facility	44%
Ambiance/social atmosphere	41%

Trip Behaviors & Spending

Trip Characteristics & Spending

40% Visiting wineries was primary trip purpose

36% Stayed at least 1 night as part of trip

3.0 Average number of tasting rooms visited during trip

7.2 Average number of bottles purchased during trip

$124 Average spend on wine per party per day

$206 Average spend on non-wine activities per party per day

Other activities they participated in during trip:

Special Event/ Festival	Dining	Shopping
100%	80%	51%

Resources Used to Select Winery

Word of Mouth	Winery Website	Free Guidebook
67%	30%	27%

OUTDOOR ENTHUIASTS

(n=913)

Respondents who participated in outdoor recreation as part of their trip

Emerging Demographic Segments

Age 21-34	Household Income <$60k	People of Color
10%	11%	11%

Wine Attitudes & Behaviors

Consume wine at least a few times per week: **81%**

Purchase wine costing $20 or more at least monthly: **35%**

When selecting a winery, they seek:

Natural beauty of property/setting	55%
Quality of the tasting room ambiance	46%
Familiar wines	28%

Once at a winery, they most enjoy:

Friendliness/hospitality of staff	70%
Attractiveness of facility	41%
Ambiance/social atmosphere	36%

Trip Behaviors & Spending

Trip Characteristics & Spending

48% Visiting wineries was primary trip purpose

44% Stayed at least 1 night as part of trip

2.9 Average number of tasting rooms visited during trip

7.7 Average number of bottles purchased during trip

$132 Average spend on wine per party per day

$190 Average spend on non-wine activities per party per day

Other activities they participated in during trip:

Outdoor Recreation	Dining	Brewery/Cidery/Distillery
100%	68%	34%

Resources Used to Select Winery

Word of Mouth	Winery Website	Wine Publication/Magazine
59%	24%	18%

VISITING FAMILY/FRIENDS

(n=462)

Respondents who said they visited family and friends as part of their trip

Emerging Demographic Segments

Age 21-34	Household Income <$60k	People of Color
6%	11%	8%

Wine Attitudes & Behaviors

Consume wine at least a few times per week: **76%**

Purchase wine costing $20 or more at least monthly: **28%**

When selecting a winery, they seek:

Natural beauty of property/setting	51%
Quality of the tasting room ambiance	49%
Familiar wines	32%

Once at a winery, they most enjoy:

Friendliness/hospitality of staff	66%
Attractiveness of facility	41%
Food on site	37%

Trip Behaviors & Spending

Trip Characteristics & Spending

2% Visiting wineries was primary trip purpose

46% Stayed at least 1 night as part of trip

2.8 Average number of tasting rooms visited during trip

7.8 Average number of bottles purchased during trip

$139 Average spend on wine per party per day

$158 Average spend on non-wine activities per party per day

Other activities they participated in during trip:

Dining	Outdoor Recreation	Shopping
75%	40%	36%

Resources Used to Select Winery

Word of Mouth	Winery Website	Wine Publication/ Magazine
61%	16%	12%

PEOPLE OF COLOR

(n=487)

Respondents who indicated they were Hispanic/Latinx, Black/African American, Asian/Pacific Islander, American Indian or Alaska Native, and/or another race/ethnicity

Emerging Demographic Segments

Age 21-34	Household Income <$60k	People of Color
9%	10%	100%

Wine Attitudes & Behaviors

Consume wine at least a few times per week: **74%**

Purchase wine costing $20 or more at least monthly: **33%**

When selecting a winery, they seek:

Natural beauty of property/setting	47%
Quality of the tasting room ambiance	39%
Familiar wines	29%

Once at a winery, they most enjoy:

Friendliness/hospitality of staff	65%
Presentation/knowledge of host	39%
Food on site	34%

Trip Behaviors & Spending

Trip Characteristics & Spending

44% Visiting wineries was primary trip purpose

30% Stayed at least 1 night as part of trip

2.7 Average number of tasting rooms visited during trip

7.2 Average number of bottles purchased during trip

$121 Average spend on wine per party per day

$152 Average spend on non-wine activities per party per day

Other activities they participated in during trip:

Dining	Shopping	Outdoor Recreation
74%	39%	31%

Resources Used to Select Winery

Word of Mouth	Winery Website	Wine Publication/ Magazine
49%	18%	16%

VISITORS WITH LOWER INCOMES

(n=568)

Respondents who reported a household income of less than 60k

Emerging Demographic Segments

Age 21-34	Household Income <$60k	People of Color
13%	100%	9%

Wine Attitudes & Behaviors

Consume wine at least a few times per week: **74%**

Purchase wine costing $20 or more at least monthly: **22%**

When selecting a winery, they seek:

Natural beauty of property/setting	49%
Quality of the tasting room ambiance	37%
Affordability	34%

Once at a winery, they most enjoy:

Friendliness/hospitality of staff	68%
Presentation/knowledge of host	35%
Food on site	35%

Trip Behaviors & Spending

Trip Characteristics & Spending

48% Visiting wineries was primary trip purpose

21% Stayed at least 1 night as part of trip

2.6 Average number of tasting rooms visited during trip

4.8 Average number of bottles purchased during trip

$97 Average spend on wine per party per day

$114 Average spend on non-wine activities per party per day

Other activities they participated in during trip:

Dining	Special Event/ Festival	Shopping
63%	33%	29%

Resources Used to Select Winery

Word of Mouth	Winery Website	Wine Publication/ Magazine
52%	19%	16%

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