

TOURISM WALLA WALLA

Visitor Survey

November 2013

BACKGROUND AND METHODOLOGY

Tourism Walla Walla is researching who is visiting the area and what draws visitors to the Walla Walla Valley.

An online survey was conducted in the summer of 2013.

- Walla Walla residents were screened out as well as those who have never visited the Walla Walla Valley.
- A net total of 1,893 visitor responses collected are addressed in the findings report.



How visitor feedback was collected

Tourism Walla Walla database	n=910
Local Walla Walla business databases	n=351
Local winery databases	n=133
Tourism Walla Walla Facebook page	n=57
iPad located at L'Ecole winery	n=182
iPad located at Seven Hills winery	n=135
iPad located at The Marcus Whitman Hotel	n=56
iPad located at airport	n=40
iPad located at Cameo Heights, outside city limits	n=29

MAJOR TAKEAWAYS

- Wine tasting is the major driver of visitors to Walla Walla
- This is primarily an adult destination with a focus on wine tasting
- Most visitors travel to Walla Walla in the months of May-September
- Repeat visitation numbers are very strong – so the experience once they get here is positive
- A majority of visitors travel to Walla Walla in their personal vehicle, of those who fly, the majority come from Seattle and California
- Walla Walla's location is a negative in terms of time and cost to get there for both those who have visited the valley and those who have not
- 80% of visitors are paying to stay
- The primary decision maker is mainly female and over the age of 35
- Our target market is well educated with no children at home and a high discretionary income

THERE'S SOMETHING SPECIAL ABOUT WALLA WALLA

"We enjoy the ambiance of the town, the fine dining, the excellent wines and lovely scenery."

from Seattle, WA

"The first time we visited, my husband saw it in sunset magazine. We loved it and visit often."

from Portland, OR

"We love Walla Walla. I have extended family there, and we enjoy wine tasting."

from Catlett, VA

"We were visiting the Pacific Northwest on a wine-centric vacation, and knew Walla Walla was a prime spot for Washington wine. We were not disappointed."

from Charlottesville, VA

"We like the town and the people, and especially the wine."

From Las Vegas, NV

"Went to college at Whitman and always love coming back to the valley—beautiful area, great downtown, good shopping, and fantastic food and wine."

from Helena MT

WINE TOPS A LONG LIST OF REASONS TO VISIT

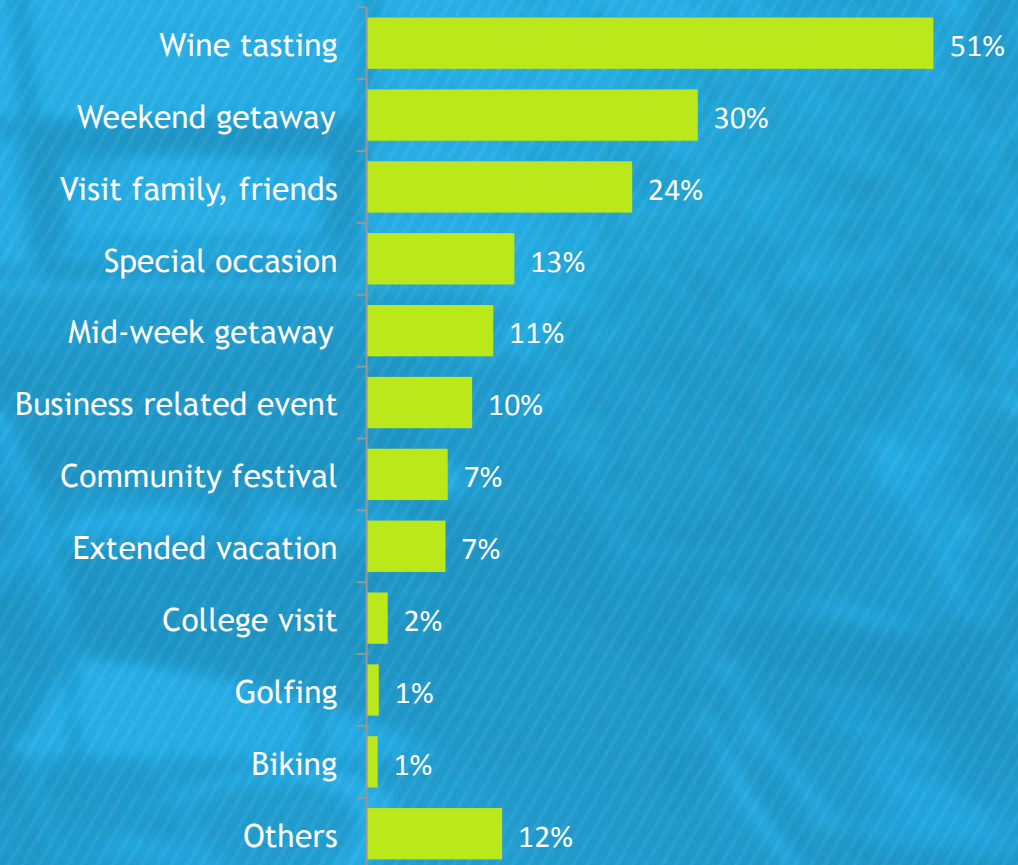


THE PURPOSE DRIVEN TRIP: WINE, WEEKENDS, FAMILY, FRIENDS

- Though only half of visitors state they came to Walla Walla for “wine tasting”, many who came for other reasons (including weekend getaways) also went wine tasting during their visit.



Purpose of most recent trip

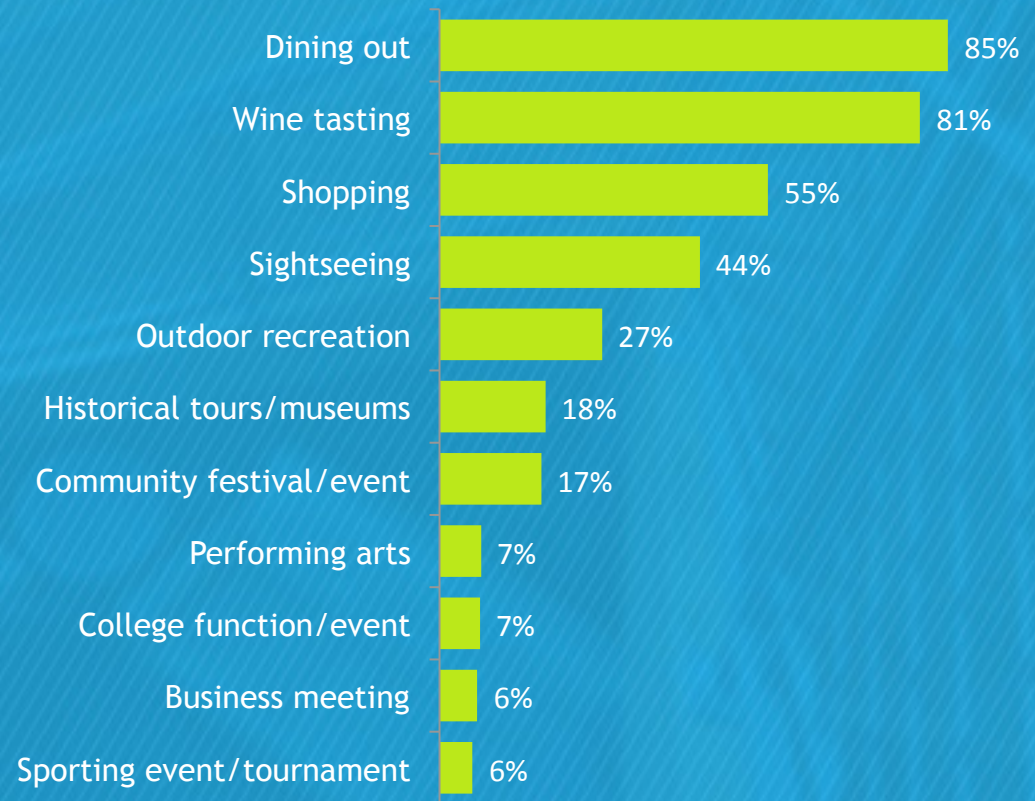


EAT, DRINK, AND BE VARIED

- Most visitors eat out and go wine tasting while in Walla Walla.



Activities during stay

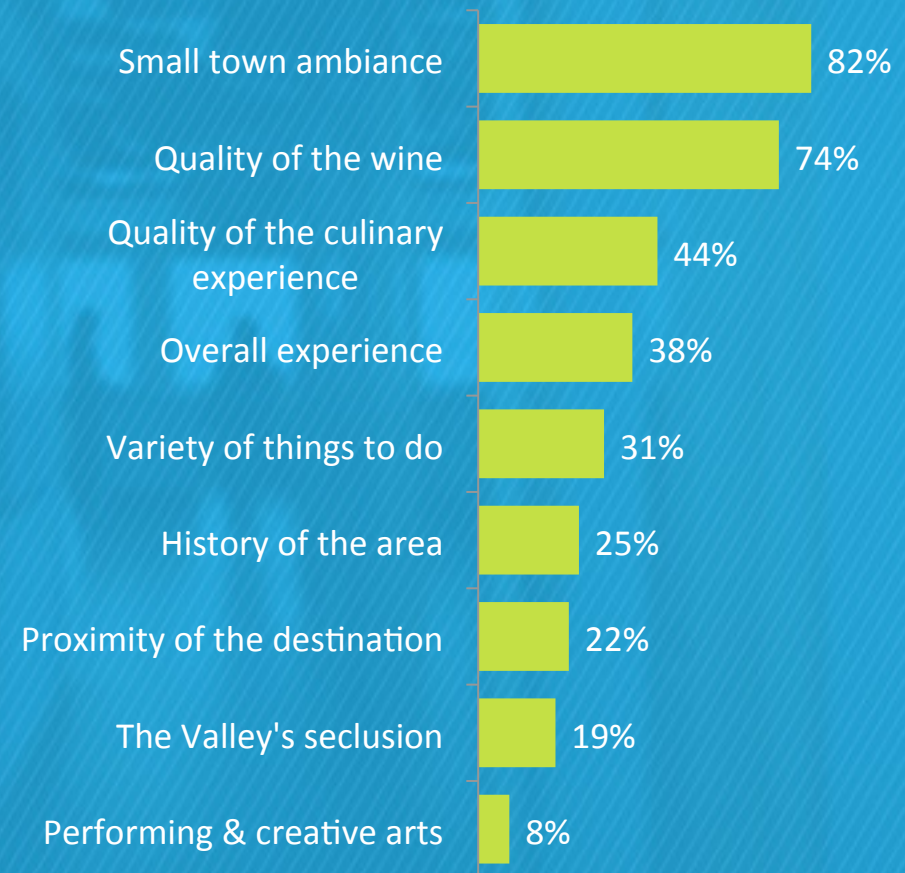


WHAT MAKES WALLA WALLA SO SPECIAL?

- Two main draws to Walla Walla Valley are the charming beauty of the town/area, and the quality of local wine.
- Visitors praise the restaurant experience and friendliness of the locals.

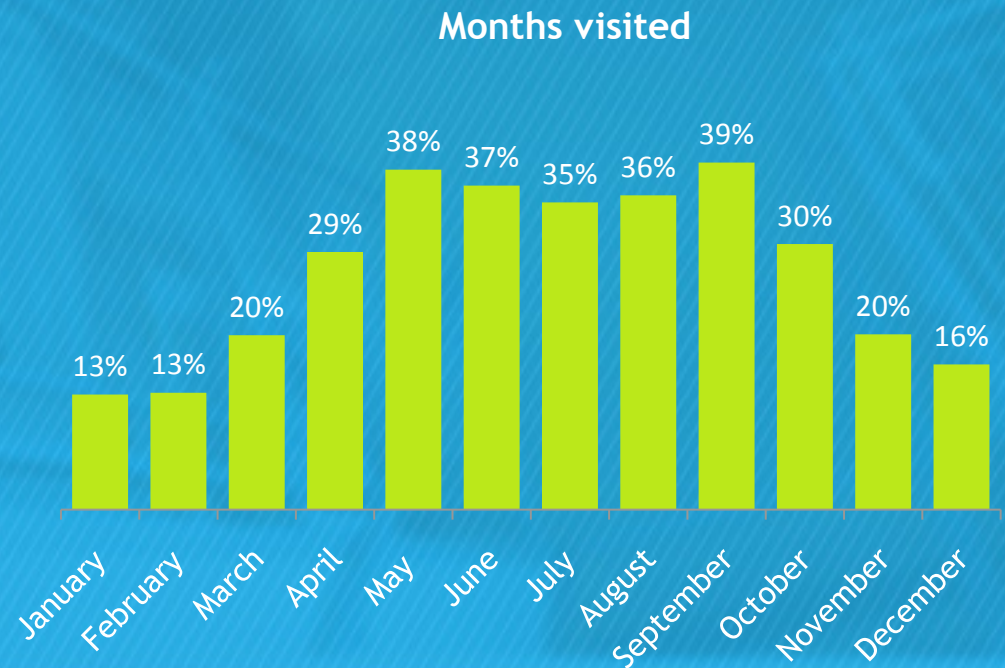
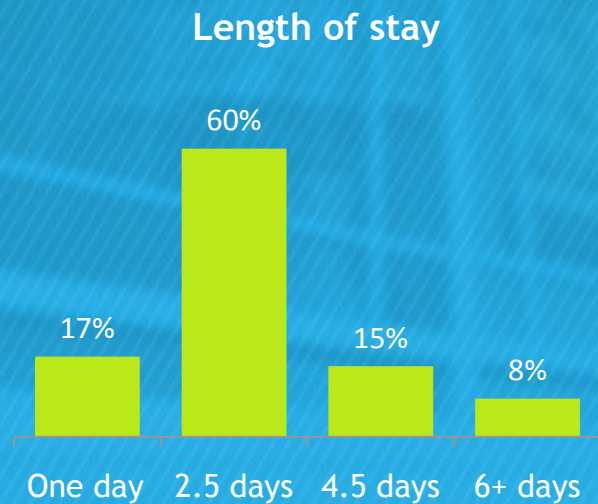


Walla Walla Valley's appeal



HOW LONG & WHEN DO PEOPLE VISIT?

- The majority are repeat visitors.
 - 70% have visited twice or more
- Most visitors to the Walla Walla Valley stay two to three days.
- May through September are the most popular time to visit Walla Walla; fewer visitors come between November and March.

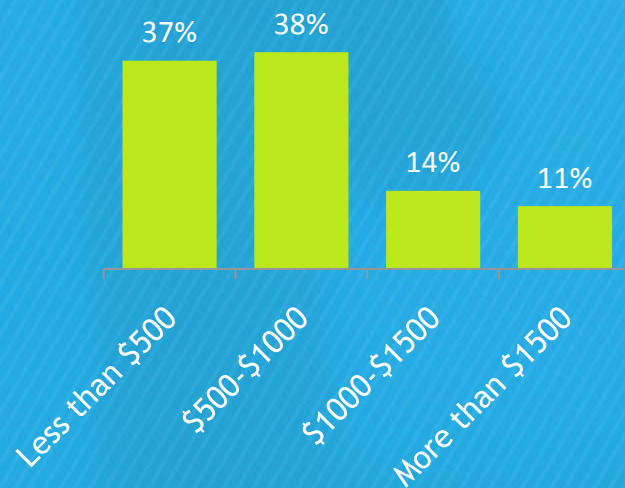


Q1. How many times have you visited the Walla Walla Valley? n=1893 Q4. What was the length of your most recent visit to Walla Walla? n=1860 Q3. In what month(s) have you visited the Walla Walla Valley in the past two years? n=1873. Note that respondents included in "Months Visited" were not in Walla Walla when they took the survey.

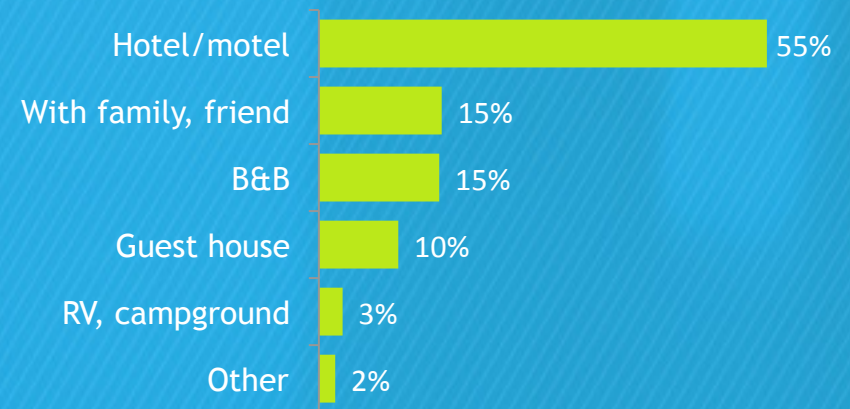
PAID LODGING IS THE CLEAR FAVORITE

- Half of visitors to Walla Walla Valley stay in a hotel or motel with another 25% paying for lodging in a B&B or guest house.
- 73% of people spend \$500 or more on their trip to Walla Walla

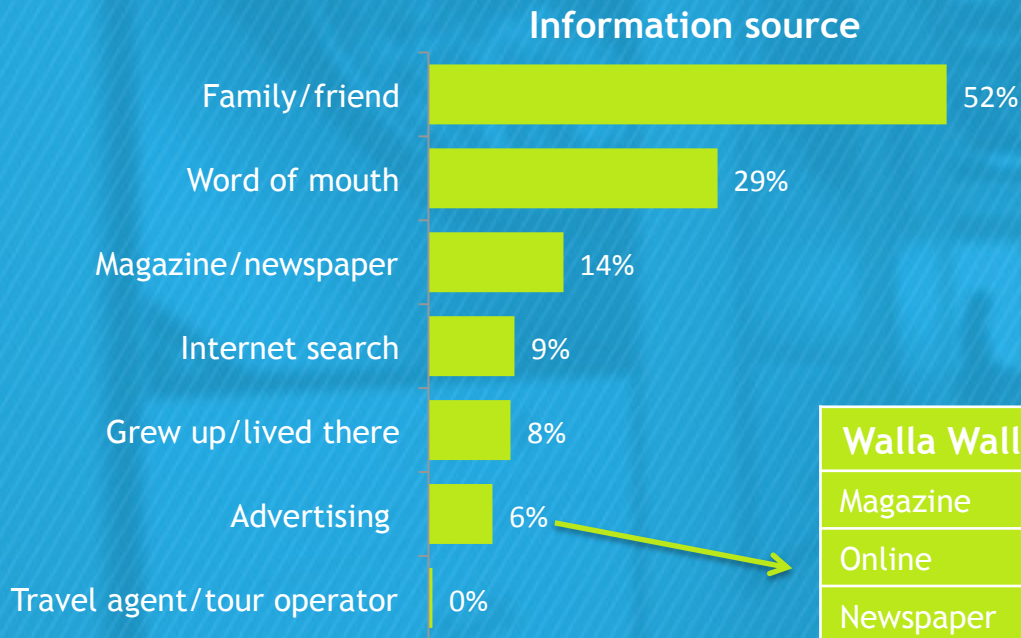
Trip expenditure



Lodging



GOOD NEWS TRAVELS FAST



- Most visitors learn about the Walla Walla Valley through friends or family and word of mouth.

Walla Walla ad sources	
Magazine	15%
Online	9%
Newspaper	3%
Radio	2%
Others	6%
None mentioned	75%

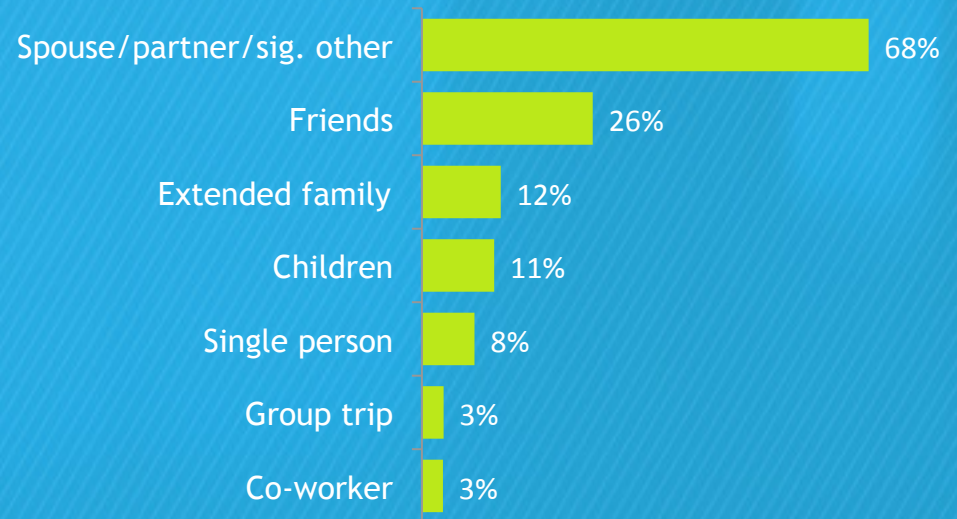
COUPLES LOVE WALLA WALLA

- Half of visitors come as a couple.
- Average party size is 2.8
- Traveling parties are typically a group of friends.
- Only 11% bring children on their visit.

Size of party	
1 person	8%
2 people	53%
3-5 people	28%
6+ people	8%

Most are couples

Travel party

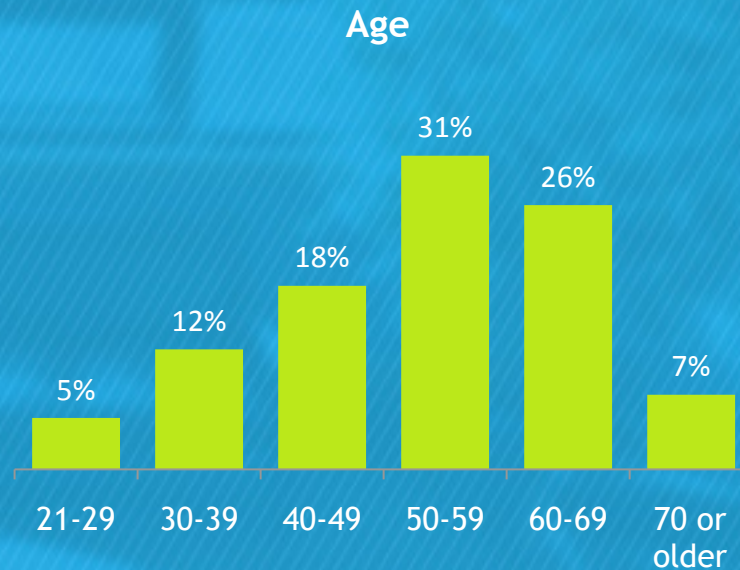


EMPTY NESTERS COME TO WALLA WALLA

- Most visitors are over 50, and are either empty nesters or do not have young children.

Gender	
Women	62%
Men	38%

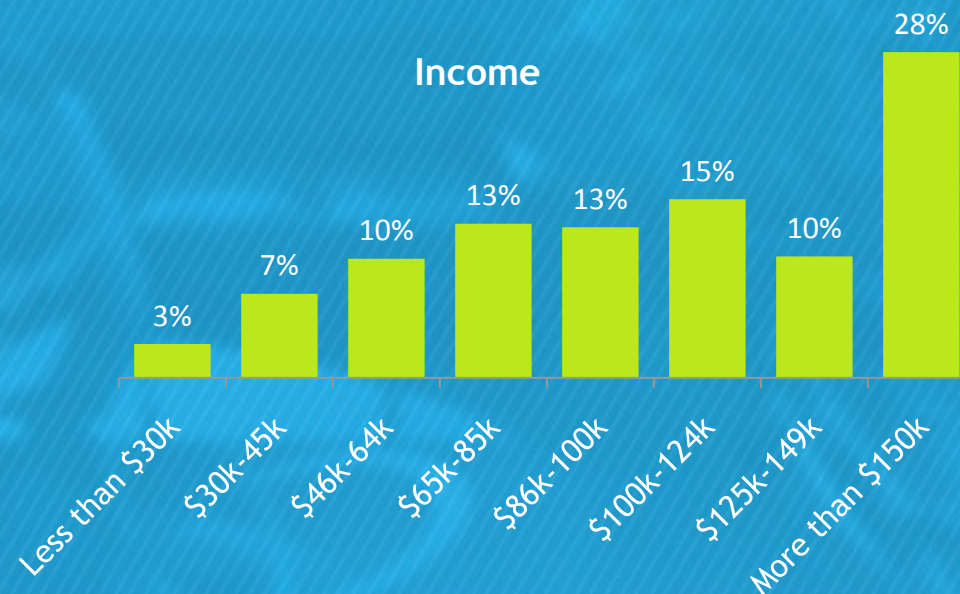
Children in HH	
No kids	80%
Kids	20%



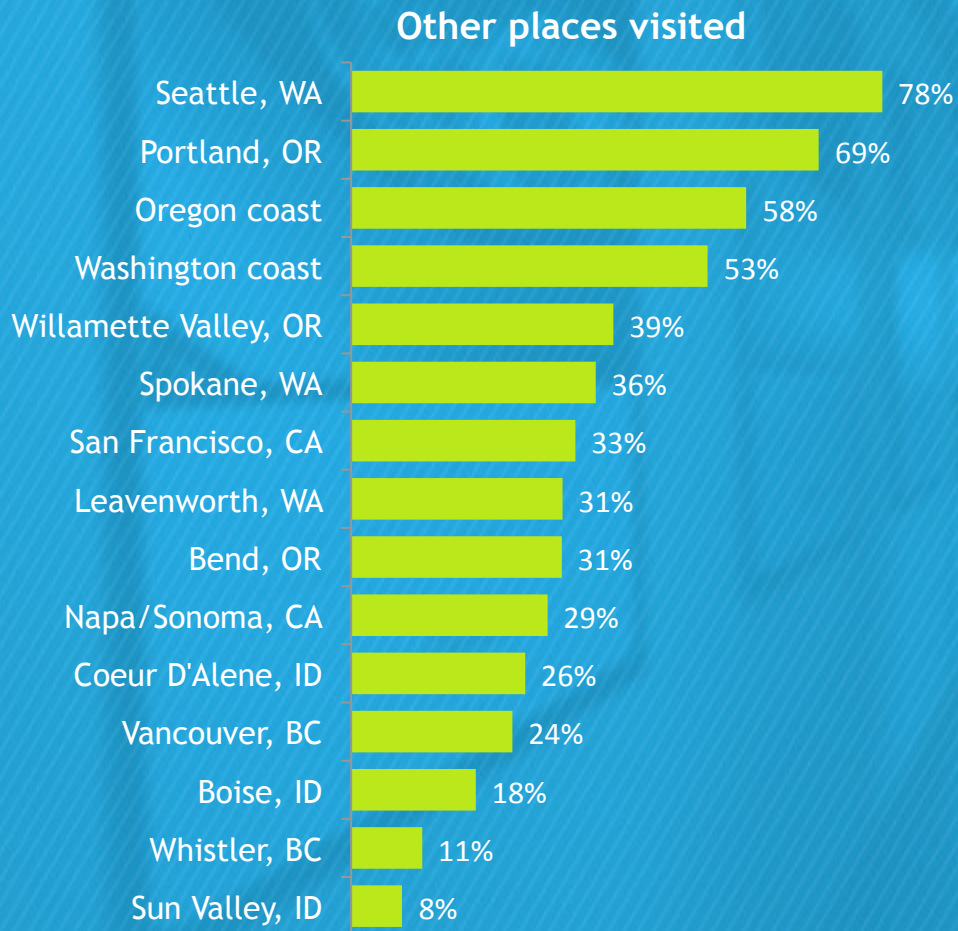
VISITORS ARE EDUCATED & AFFLUENT

- Half of visitors have an income over \$100,000.
- Visitors are well-educated: over two-thirds have college degrees, nearly all have some college education.

Education level	
High school degree	3%
Some college	16%
Associate degree	10%
Bachelor degree	39%
Graduate degree	32%



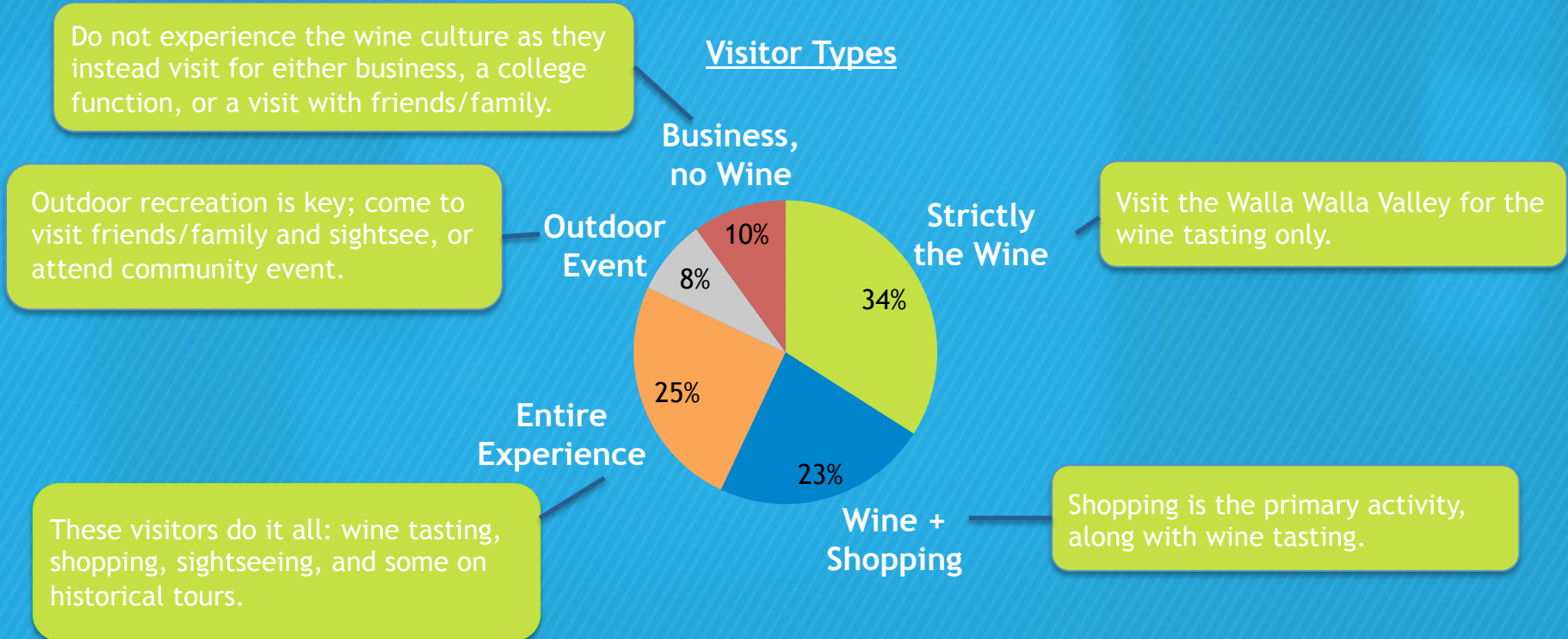
WALLA WALLA COMPETES WITH ALL KINDS OF DESTINATIONS



- Seattle and Portland have been visited in the past three years by most Walla Walla visitors.
 - However, many live in these metropolitan areas.
- The coast ranks second as a common destination.
- Other popular wine destinations are the Willamette Valley and Napa/Sonoma.

VISITORS SEGMENT INTO FIVE TYPES

- Assuming visitors come to the Walla Walla Valley for different reasons and activities, the data were analyzed to identify these groups.
 - Combinations of activities visitors participated in (Q11) were analyzed with a multivariate model.
- The data reveals five types of visitors:



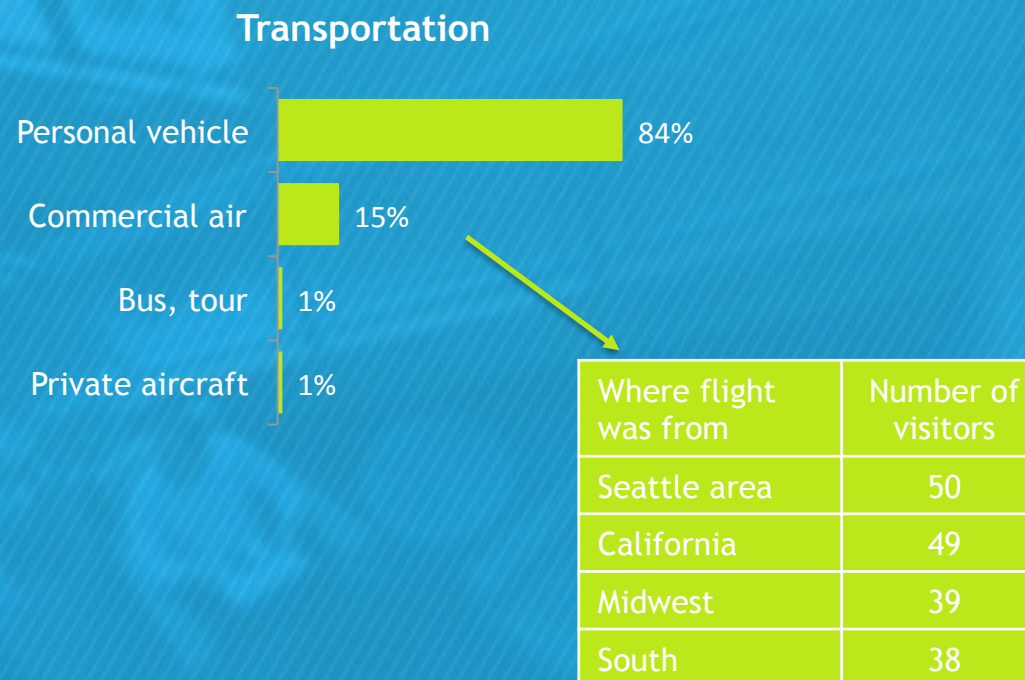
SEGMENT DETAILS

- The model outcome illustrates the differences in activities the five types of visitors experienced in Walla Walla.

<u>Activity</u>	Strictly the Wine	Wine + Shopping	Entire Experience	Outdoor Event	Business, no Wine
Wine tasting	97%	86%	88%	66%	4%
Dining out	78%	100%	93%	100%	44%
Shopping	17%	96%	76%	78%	20%
Sightseeing	19%	39%	73%	78%	38%
Historical tours	6%	0%	45%	44%	12%
Performing arts	2%	5%	9%	28%	5%
Community festival/event	7%	13%	22%	65%	10%
Sporting event/tournament	4%	7%	0%	27%	5%
College function/event	4%	4%	8%	14%	15%
Outdoor recreation	18%	26%	20%	93%	31%
Business meeting	7%	7%	3%	6%	13%

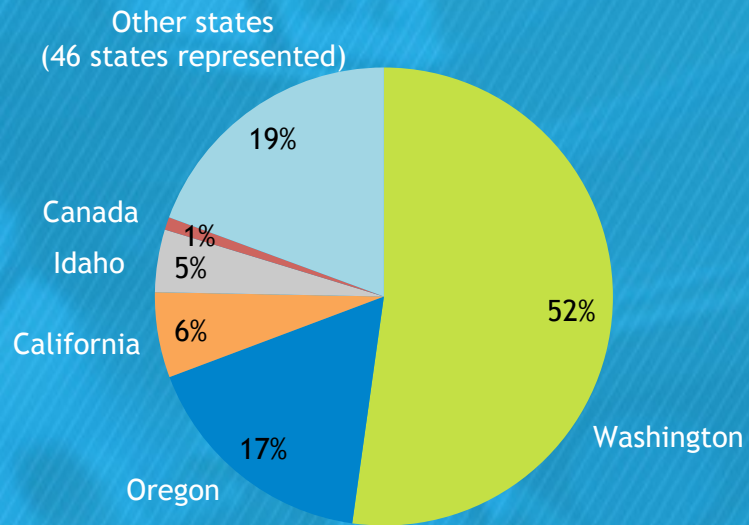
DRIVING IS KING, BUT FLYING IS IN THE MIX

- Most arrive by car.



SEATTLE IS STILL THE PRIMARY MARKET

Where are they from



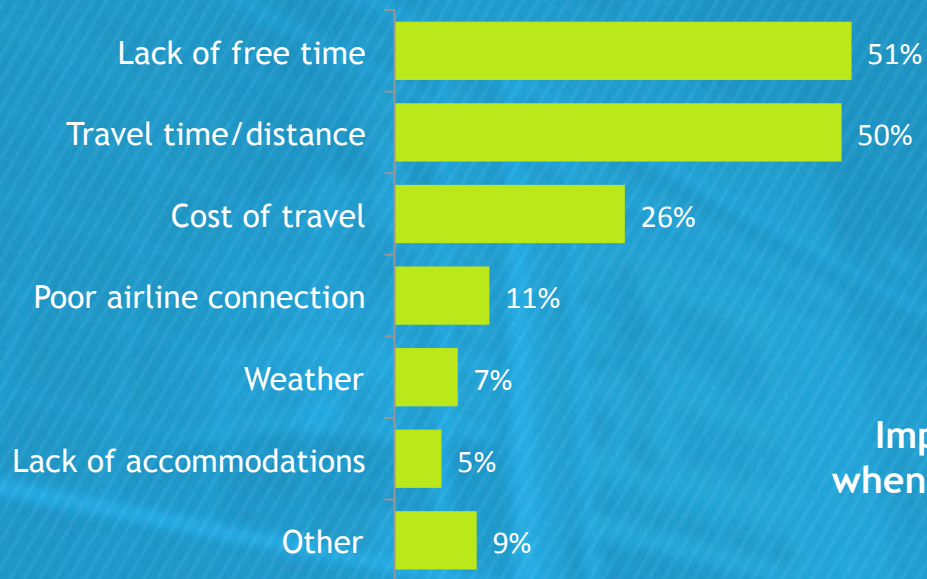
- Half of visitors to Walla Walla come from Washington, the majority from the Seattle area.

Washington region

Seattle/Olympia	72%
Eastern Washington	21%
SW Washington	7%

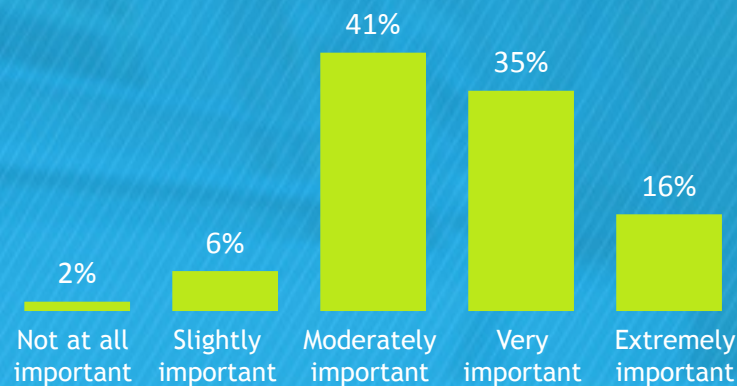
OVERCOMING OBSTACLES

Obstacles to visiting WW more frequently



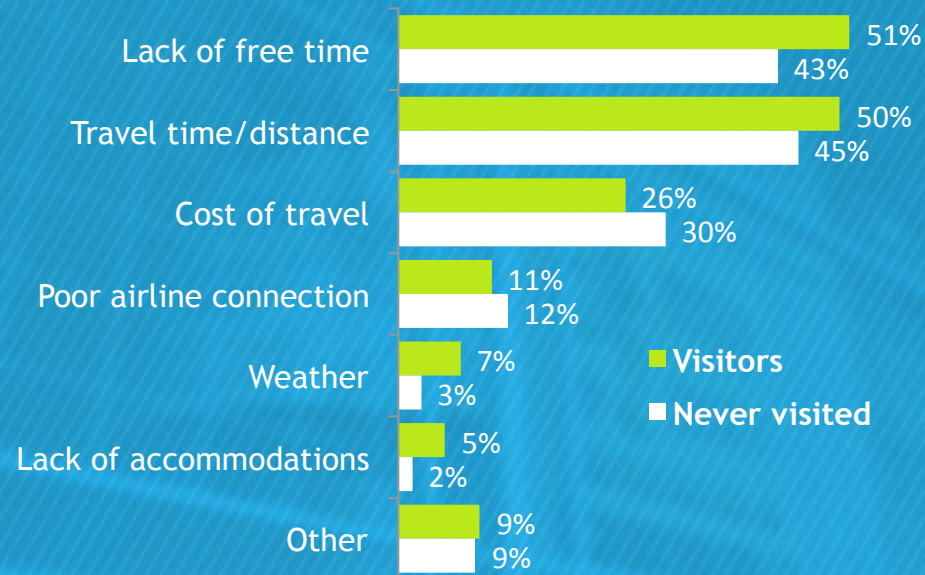
- Time is the main reason given for not visiting the Walla Walla Valley more often.
- Traveling to Walla Walla can be a hindrance, which involves time, distance and expense.
- The cost of travel is important, but not critical for vacation planning.

Importance of cost when vacation planning

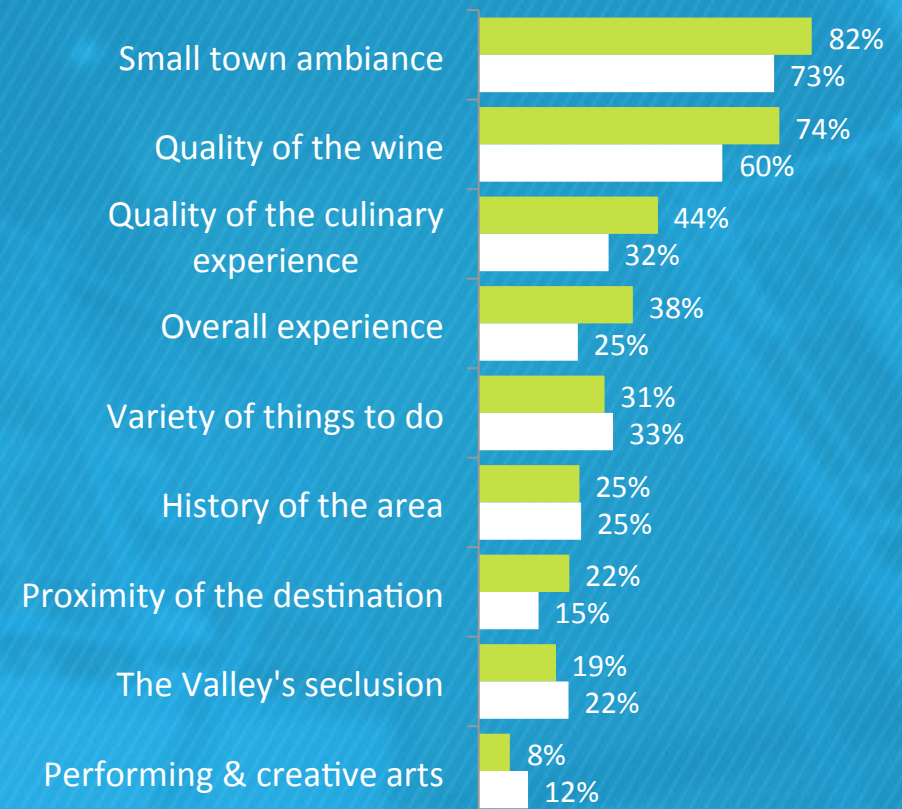


TRAVEL TIME AND MONEY KEEP VISITORS FROM COMING TO THE WALLA WALLA VALLEY

Obstacles to visiting WW more frequently



Walla Walla Valley's appeal



- Those who have never visited Walla Walla are younger and less affluent.

- 45% of non-visitors are less than 50 years old, compared to 35% of visitors.
- 19% of non-visitors make \$150K+, compared to 28% of visitors.

TAKE THEIR WORD FOR IT

“It’s beautiful and fun. Love the farmer’s market, the onions, the wine, the weather.”

from Stillwater, MN

“Had seen enough magazine/ newspaper articles about it; lived in Seattle for almost 30 years and had never been to that part of the state. Everything we expected.”

from Seattle, WA

“Wine tasting and the warmth of the town and its people.”

from Morganton, NC

“Our daughter just graduated from Whitman. We enjoy the area and will be back up in October to watch a cyclo cross bike race.”

from Sisters, OR

“I like the weather and how Walla Walla has changed over the years to provide many activities.”

from Lilburn, GA

“We really enjoy the wineries, scenery and pace of life. It’s the perfect getaway!”

from Snoqualmie, WA