Discover North Carolina Wines: A Winery Visitor Marketing Profile Study

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Executive Summary

This research is a follow-up and extension to a previous study originally conducted by Evans and Pollard (2008). The first study focused on the tourism implications of the North Carolina Wineries since the division of wines is in the North Carolina Department of Commerce under Tourism. This new study focused on the marketing implications of the winery visitor. The survey instrument was slightly altered for this new study. However, comparisons can be made on many significant variables in both studies (See Appendix B).

In 2011 the economic impact of winery visitation to communities surrounding the winery can also be illustrated by the average size of the travel party (3.7), of which 37% stay overnight mostly in hotels and motels (a plurality of 49.5%). In addition, winery visitors spent an average of nearly $200 per trip which is money brought into the local community from outside since their average travel distance averaged 146 miles[1]. Furthermore, a plurality (42.7%) of winery visitors indicated that the primary purpose of their trip was to visit wineries indicating that the winery was the magnet that pulled them into the area.

The primary motivation winery visitors had to visit the winery was to taste and buy wine and winery visitors were quite satisfied with various aspects of the winery including the quality of the wine and the wine tasting room. This positive level of satisfaction is quite important given the hedonic nature of wine purchases, and is made more explicit given that friends and relatives (i.e., word of mouth) was reported to be the most important information source used when deciding to visit a winery.

Although friends and relatives were reported as the most influential information source relied on when deciding to visit the winery, the internet was moderately influential and the *Discover NC Wines* Brochure as well as the winery billboards were somewhat influential. With respect to the internet, Google was reported to be the most important site, followed by Visit NC Wine.com, and individual winery websites.

The 2011 profile of winery visitors study indicated that consumers were highly educated, above average income, middle age consumers primarily residing in North Carolina, although a moderate number of winery visitors resided in neighboring states. The 2011 data indicates the impact of the recent national recession on "wine tourism" in North Carolina. Tourism visits from South Carolina, Florida, Virginia, Pennsylvania, Tennessee, and Georgia were all down when compared to the 2008 study.

[1] Visitors are generally considered tourists if they have traveled 50 miles or more from their home to reach their destination (National Tourism Resources Review Commission 1973).

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Laurel Gray Vineyards

Old Stone Winery

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Shelton Vineyards

Weathervane Winery

Thank you all for your support.

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Introduction

This research is a follow-up and extension to a previous study originally conducted by Evans and Pollard (2008). The first study focused on the tourism implications of the North Carolina Wineries since the division of wines is in the North Carolina Department Commerce under Tourism. This study focused on the marketing implications of the winery visitor. The survey instrument was slightly altered for this new study. However, comparisons can be made on many significant variables in both studies. In 2010 a grant was issued by the U.S. Small Business Administration to the Appalachian State Wine Initiative. This research project was part of that initiative and sought to develop information about North Carolina winery visitors. The information collected included visitor demographics, psychographics, travel party statistics, as well as visitor satisfaction with various aspects of North Carolina wineries and visitor spending. Hopefully, the results of this study will be useful for marketing strategy formulation.

The following section of this report discusses the research method employed. Subsequently, the results are presented and the report concludes with some closing comments.

Research Method

Survey Instrument. A survey was used in order to learn more about the visitors to the North Carolina wine regions and to gather information about the economic impact of North Carolina wineries. It was reviewed by the North Carolina Wine and Grape Council who also provided important feedback regarding the survey design. The research was conducted by Appalachian State University.

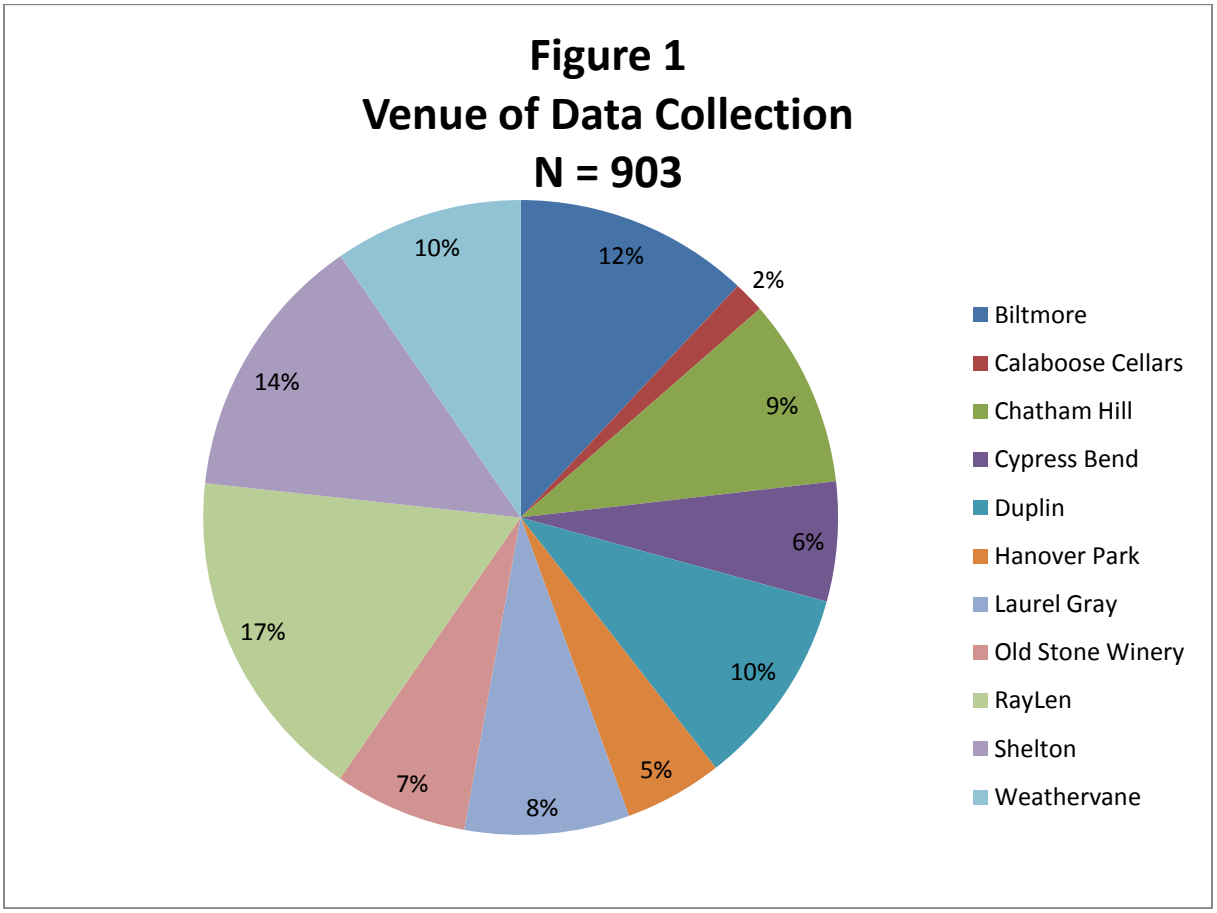
The questionnaire can be broken down into the following seven categories:

1. Type of Visitor: asked if the respondent was a new or returning visitor to the winery and, if they were a returning visitor, how many times have they visited the winery.

2. Travel Party Statistics: examined the total number of people in the respondent's travel party, if their visit was a day trip or an overnight trip, the purpose of the trip, miles traveled to the winery and the motivation for visiting the specific winery where they are filling out the questionnaire. If the trip was overnight, they were asked how many nights they were staying and in what type of accommodation.
3. Satisfaction with Winery: measured the satisfaction levels with the following aspects of the winery – wine quality, overall wine experience, attractions on wine route, access to wineries, tasting room, signage to winery and other.
4. Influence of Information Sources: asked the respondent to evaluate how important the following information sources were when deciding to visit the winery – friend/relative, billboard ad, magazine ad, the internet, visitor center, directory or guidebook, news or feature story, Discover NC Wines brochure, individual winery brochure and other.
5. Importance of Internet: asked how important the following websites were in deciding to visit the winery: Google, Yahoo, Bing, Ask, winery websites, Visit NC Wine.com and other.
6. Spending: asked the total estimated dollar amount that the travel party will spend at all North Carolina wineries.
7. Demographics: measured the age, home zip code, educational attainment and yearly income of the visitor.

Data Collection. The data used in this study were collected from eleven wineries (see Figure 1). The questionnaires were given to the wineries who administered them to their guests in the tasting room. Travel parties were instructed to only complete one survey per travel party.

The data were collected between May 2010 and October 2010. A total of 903 surveys were collected from the various wineries.



Results

Question 1: Are you a new or returning visitor to a North Carolina winery?

The number of survey respondents who identified themselves as new visitors were about the same as the number of respondents who identified themselves as repeat visitors. Out of 900 survey respondents, 471 (52%) were new visitors, 429 (48%) were returning visitors and 3 responses were missing.

Question 2: If you are a returning customer, please tell us the TOTAL number of times you have visited this winery.

If the visitor was a returning visitor, the average number of times that he or she had visited the winery averaged 6.05 with a standard deviation of 9.59. Table 1 shows the reported frequencies that the respondent had visited the winery *if* they were a returning visitor:

Table 1
Reported Frequencies of Returning Visitors

Times Visited	Frequency	Percent	Cumulative Percent
1	70	16.3	18.9
2	99	23.1	45.7
3	44	10.3	57.6
4	26	6.1	64.6
5	20	4.7	70.0
6	27	6.3	77.3
7	5	1.2	78.6
8	11	2.6	81.6
10	21	4.9	87.3
11	3	0.7	88.1
12	6	1.4	89.7
13	1	0.2	90.0
15	9	2.1	92.4
17	1	0.2	92.7
20	10	2.3	95.4
21	1	0.2	95.7
24	1	0.2	95.9
25	3	0.7	96.8
30	4	1.2	98.1
35	2	0.5	98.6
40	1	0.2	98.9
50	1	0.2	99.2
60	1	0.2	99.5
80	1	0.2	99.7
100	1	0.2	100.0
Total	370	86.2	
Missing	59	13.8	
Total	429	100.0	

Question 3: Please tell us the total number of people in your travel party (friends and family only) including yourself.

The average number of people in the travel party was 3.68 with a standard deviation of 4.07 (n = 882). Table 2 shows the distribution of travel party size.

Table 2
Frequency of Nights Staying in the Area (Overnight Visitors Only)

Travel Party Size	Frequency	Percent	Cumulative Percent
1 - 2	441	50.0	50.0
3 - 4	296	33.5	83.5
5 - 6	90	10.2	93.7
7+	55	6.3	100.0
Total	882	100.0	

Question 4: Are you here on a day trip or staying overnight in the area?

This question was a categorical scale with the following response categories:

1. Day Trip
2. 1 Night
3. 2 Nights
4. 3 Nights
5. 4 Nights
6. 5 or More Nights

Of the 887 responses to this question, 559 reported being day trippers (63%). Of those who reported being overnight visitors, the average number of nights they were staying was 2.66 (standard deviation of .499). Table 3 shows the distribution of overnight visitors.

Table 3
Frequency of Nights Staying in the Area (Overnight Visitors Only)

Number of Nights	Frequency	Percent	Cumulative Percent
1 Night	97	29.6	29.6
2 Nights	83	25.3	54.9
3 Nights	48	14.6	69.5
4 Nights	33	10.1	79.6
5 or More Nights	67	20.4	100.0
Total	328	100.0	

Question 5: If you are staying overnight, please tell us what type of accommodation you are using?

1. Hotel/Motel
2. Bed & Breakfast
3. Friends & Family
4. Camping
5. Cabin Rental
6. Other

Overnight visitors most frequently reported staying at hotels or motels (49.5%) followed by friends and family (27.9%). Table 4 shows the distribution of accommodations of overnight visitors.

Table 4
Frequency of Accommodations (Overnight Visitors Only)

Number of Nights	Frequency	Percent	Cumulative Percent
Hotel/Motel	158	49.5	49.5
Bed & Breakfast	21	6.6	56.1
Friends & Family	89	27.9	84.0
Camping	10	3.1	87.1
Cabin Rental	20	6.3	93.4
Other	21	6.6	100.0
Total	328	100.0	

Question 6: What is the main purpose of your trip?

1. Visiting Wineries
2. Visit Friends & Family
3. Holiday/Vacation
4. Passing Through
5. Other

The majority of respondents reported that the main purpose of their trip was visiting wineries (42.7%) followed by visiting friends and family (18.1%). Table 5 presents the distribution of purpose of the trip.

Table 5 Frequency of Trip Purpose			
Number of Nights	**Frequency**	**Percent**	**Cumulative Percent**
Visiting Wineries	364	42.7	42.7
Visiting Friends and Family	154	18.1	60.8
Holiday/Vacation	135	15.8	76.6
Just Passing Through	80	9.4	86.0
Other	119	14.0	100.0
Total	852	100.0	

Question 7: Please tell us how many miles you drove from your home or accommodations to this winery today?

This was a free response question. Of the 878 respondents reporting, the average number of miles driven from home to the winery was 145.97 miles with a standard deviation of 259.131. Table 6 shows the distribution of responses broken down categorically.

Table 6 Frequency of Miles Driven from Home			
Number of Miles	**Frequency**	**Percent**	**Cumulative Percent**
0 - 50	432	49.2	49.2
51 - 100	189	21.5	70.7
101 - 150	50	5.7	76.4
151 - 200	50	5.7	82.1
201 - 250	20	2.3	84.4
251 - 300	32	3.6	88.0
301 - 350	5	0.6	88.6
351 - 400	22	2.5	91.1
Over 400	78	8.9	100.0
Total	878	100.0	

Question 8: What is your motivation for visiting THIS specific winery? Check all that apply.

1. Taste Wine
2. Buy Wine
3. Eat at Winery
4. Winery Tour
5. Enjoy Rural Setting
6. Relaxing Day Out
7. Socialize with Friends & Family
8. Meet the Winemaker
9. To be Entertained
10. Attend a Special Event

This was a multiple response question. Of the respondents reporting, the most frequent response was that their primary motivation for visiting the winery was tasting the wine, followed by buying wine. Table 7 summarizes the results.

Table 7
Frequency of Motivation to Attend the Winery

Motivation	Frequency
To Taste the wine	701
To Buy Wine	500
To Eat at Winery	110
To Take a Winery Tour	243
To Enjoy Rural Setting	168
To Have A Relaxing Day Out	308
To Socialize With Friends & Family	311
To Meet The Winemaker	60
To Be Entertained	130
To Attend a Special Event	51

Question 9: Please indicate how satisfied (1=Very Satisfied; 2=Moderately Satisfied; 3=Somewhat Satisfied; 4=Not Satisfied) you are with each of the following aspects of your visit to THIS winery.

Table 8 summarizes the responses to this question.

Table 8
Satisfaction With the Winery

Rank	Satisfaction with…	Mean	SD
1	Overall Wine Experience	1.09	.316
2	Winery's Tasting Room	1.10	.366
3	Winery's Wine Quality	1.12	.354
4	Access to the Winery	1.21	.467
5	Signage to the Winery	1.29	.619
6	Attractions along the Wine Route	1.59	.776

Table 8 shows that satisfaction was relatively high overall. The satisfaction with overall wine experience (mean = 1.09) was close to Very Satisfied. The lowest satisfaction was with attractions along the wine route (mean = 1.59) but this mean falls between Very and Moderately Satisfied.

Question 10: Please tell us how influential (1=Highly Influential; 2=Moderately Influential; 3=Somewhat Influential; 4=Almost No Influence) the following information sources were in your decision to visit THIS winery or wine region?

Table 9 summarizes the results.

Table 9
Influence of Information Sources in Deciding to Visit Winery

Rank	Information Source	Mean	SD
1	Friend/Relative	1.93	1.277
2	The Internet	2.46	1.312
3	Discover NC Wines Brochure	2.54	1.329
4	Individual Winery Brochure	2.91	1.229
5	Directory or Guidebook	2.94	1.252
6	Billboard Ad	3.11	1.165
7	Visitor Center	3.30	1.117
8	News or Feature Story	3.32	1.084
9	Magazine Ad	3.35	1.063

As Table 9 shows, friends and family (word of mouth) was the most influential information source followed by the internet and brochures.

Question 11: If you use the internet for your winery visit decision, please tell how important (1=Very Important; 2=Moderately Important; 3=Somewhat Important; 4=Almost No Importance) the following internet sites are:

1. Google
2. Yahoo
3. Bing
4. Ask
5. Winery Websites
6. Visit NC Wine.com

Table 10 summarizes the results.

Table 10
Importance of Internet Sites for Winery Visit Decision

Rank	Internet Site	Mean	SD
1	Google	1.66	1.127
2	Visit NC Wine.com	2.03	1.270
3	Winery Websites	2.09	1.275
4	Yahoo!	2.78	1.309
5	Bing	3.33	1.102
6	Ask	3.67	0.784

These results show that Google is important when winery visitors are searching for information to make a visit decision. Visit NC Wine.com and individual winery websites were also moderately important.

Question 12: Please indicate the TOTAL ESTIMATED DOLLAR AMOUNT that you and your travel party have spent or will spend at ALL North Carolina wineries visited on THIS trip.

This was an open-ended question. Of the 762 respondents reporting, the average expenditure was $197.27 per travel party for the trip. However, there was much variation in spending patterns as is evidenced by the high standard deviation of $411.78. Table 11 shows the frequency of responses broken down categorically.

Table 11
Frequency of Travel Party Spending

Spending	Frequency	Percent	Cumulative Percent
$0 - $50	236	30.97	30.97
$51 - $100	194	25.46	56.43
$101 - $150	73	9.58	66.01
$151 - $200	99	12.99	79.00
$201 - $250	28	3.67	82.68
$251 - $300	48	6.30	88.98
$301 - $350	6	0.79	89.76
$351 - $400	13	1.71	91.47
$401 - $450	3	0.39	91.86
$451 - $500	26	3.41	95.28
Over $500	36	4.72	100.00

Question 13: Please tell us the year of your birth (Not Age)?

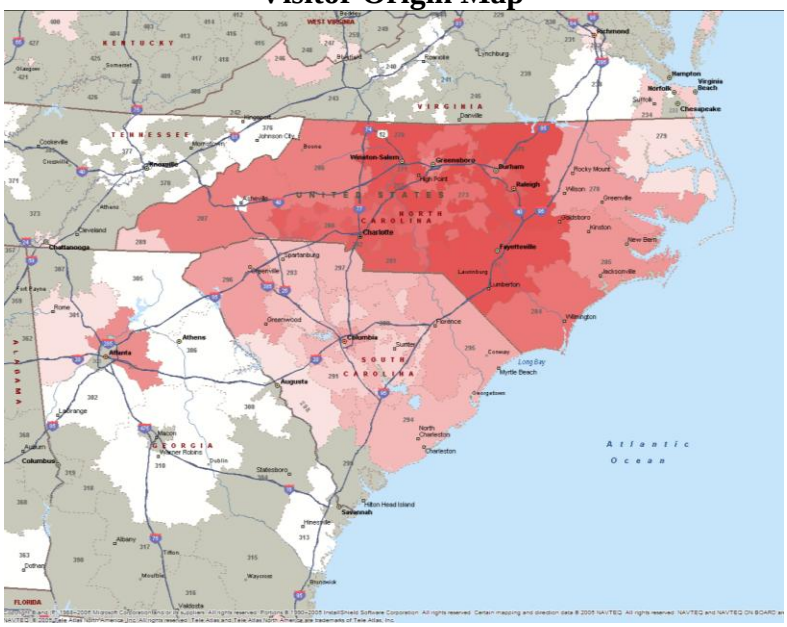
Respondents were asked their year of birth. Age was computed as 2010 - year of birth. The average of respondents was 47.34 years (n = 877, standard deviation = 14.14). Table 12 shows the age distribution of winery visitors.

Table 12 Age Distribution of Winery Visitors by Generation			
Generation	**Frequency**	**Percent**	**Cumulative Percent**
Greatest Generation 1901 - 1945	78	8.8	8.8
Baby Boomers 1946 - 1964	426	48.6	57.4
Generation X 1965 - 1985	322	36.7	94.1
Millennials 1986 - 1994	51	5.8	100.0
Total	877	100.0	

Question 14: Please tell us your home ZIP code?

Using respondent's ZIP codes, a visitor origin map was generated (Figure 2).

Figure 2
Visitor Origin Map



The origin map above shows that most visitors come from central North Carolina; however, there is a sizeable tourist group from Atlanta. Appendix A provides the customer origin table by city and state. Table 13 shows the states where the bulk of visitors come from.

Table 13 Major States of Visitor Origin		
State	**Frequency**	**Percent**
North Carolina	566	63.8
Florida	41	4.62
South Carolina	37	4.17
Ohio	26	2.93
Georgia	9	1.02
Pennsylvania	8	0.09
Tennessee	8	0.09
Total	695	77.0[1]
[1]The remainder of the visitors come from other states		

Question 15: Please tell us your level of educational attainment.

1. Some High School
2. Completed High School
3. Some College
4. Bachelor's Degree
5. Some Graduate School
6. Graduate Degree

Table 14 summarizes the results.

Table 14 Educational Attainment of Respondents			
Education Level	**Frequency**	**Percent**	**Cumulative Percent**
Some High School	3	.3	.3
Completed High School	58	6.6	6.9
Some College	189	21.5	28.4
Bachelor's Degree	253	28.8	57.2
Some Graduate School	83	9.4	66.7
Graduate Degree	293	33.3	100.0
Total	879	100.0	

As the table shows, respondents were highly educated with over 71% having earned a Bachelor's degree or higher.

Question 16: Please tell us your yearly income.

1. Less than $24,999
2. $25,000 - $49,999
3. $50,000 - $74,999
4. $75,000 - $99,999
5. $100,000 - $124,999
6. $125,000 - $149,999
7. $150,000 - $174,999
8. $175,000 - $199,999
9. Over $200,000

The results are summarized in Table 15.

Table 15
Income Level of Respondents

Income Level	Frequency	Percent	Cumulative Percent
Less than $24,999	52	6.7	6.7
$25,000 - $49,999	190	24.6	31.3
$50,000 - $74,999	186	24.1	55.4
$75,000 - $99,999	101	13.1	68.5
$100,000 - $124,999	101	13.1	81.6
$125,000 - $149,999	67	8.7	90.3
$150,000 - $174,999	17	2.2	92.5
$175,000 - $199,999	23	3.0	95.5
Over $200,000	35	4.5	100.0
Total	772	100.0	

As the table shows, the majority of respondents had household incomes of less than $75,000 per year. In this case, the median household income was in the rage of $50,000 - $74,999, slightly higher than the 2009 median income of $49,777 reported by the U.S. Census Bureau.

Discussion

The results from this study warrant discussion concerning the managerial implications of the findings. This discussion will focus on observations about the results, in the order that the results were presented (i.e., survey order).

First, it is necessary to point out that the data were collected from only 10 of the 95 wineries identified by the North Carolina Department of Commerce Wine and Grape Council in 2010. Therefore, the data should be interpreted with caution since the sample of wineries may not be representative of all North Carolina wineries. In fact, as Table 16 shows, the sample of wineries in this study tended to over sample the larger wineries and under sample the smaller wineries.

Table 16
Statistical Comparison of Sample Wineries (N=11) to All NC Wineries (N=98)

All Wineries			**Sample Wineries**			**Difference**
Total Cases/Year	768,700		Total Cases/Year	552,900		215,800
Average Cases	7,844		Average Cases	50,264		42,420
Max Cases	320,000		Max Cases	320,000		0
Min Cases	400		Min Cases	400		0
≤ 1,000 Cases	59	60.2%	≤ 1,000 Cases	3	27.3%	32.9%
1,001-5,000	25	25.5%	1,001-5,000	2	18.2%	7.3%
5,000-10,000	7	7.1%	5,000-10,000	2	18.2%	11.1%
10,000-100,000	5	5.1%	10,000-100,000	2	18.2%	13.1%
> 100,000 Cases	2	2.0%	> 100,000 Cases	2	18.2%	16.2%

Second, this research is a follow-up and extension to a previous study originally conducted by Evans and Pollard (2008). Therefore, comparisons between the present report and the original study will be made when appropriate (See Appendix B).

It was interesting to see that there was an almost even split between new and returning visitors to the wineries. This is important in two respects. First, the development of new markets is always important for the generation of revenue. Second, returning visitors provide wineries for increased profit potential as it has been estimated to cost 20% as much to sell to an existing customer than to a new customer (Kotler 1997). In addition, customer lifetime value (the net present value of future profits from a customer) increases markedly with customer longevity (Peppers and Rogers 2004). This tremendous increase in customer lifetime value is exemplified by an average of 6 visitations of returning customers to wineries and stresses the

importance of marketing tactics to bolster customer loyalty to the winery (e.g., wine clubs, on-site festivals, etc.). However, it is also important to point out that visitation should be increasing as wineries develop new customers.

The economic impact of winery visitation to communities surrounding the winery can also be illustrated by the average size of the travel party (3.7), of which 37% stay overnight mostly in hotels and motels (a plurality of 49.5%). In addition, winery travel parties spent an average of nearly $200 per trip, much of which is money brought into the local community from outside since over 50% of visitors resided more than 50 miles from the winery and the average travel distance was 146 miles[2]. Furthermore, a plurality (42.7%) of winery visitors indicated that the primary purpose of their trip was to visit wineries indicating that the winery was the magnet that pulled them into the area.

The primary motivation winery visitors had to visit the winery was to taste and buy wine and winery visitors were quite satisfied with various aspects of the winery including the quality of the wine and the wine tasting room. This positive level of satisfaction is quite important given the hedonic nature of wine purchases, and is made more explicit given that friends and relatives (i.e., word of mouth) was reported to be the most important information source used when deciding to visit a winery.

Although friends and relatives were reported as the most influential information source relied on when deciding to visit the winery, the internet was moderately influential and the *Discover NC Wines* Brochure as well as the winery billboards were somewhat influential. With respect to the internet, Google was reported to be the most important site, followed by Visit NC Wine.com, and individual winery websites.

[2] Visitors are generally considered tourists if they have traveled 50 miles or more from their home to reach their destination (National Tourism Resources Review Commission 1973).

The 2011 profile of winery visitors as measured in this study indicated that they were highly educated, above average income, middle age consumers primarily residing in North Carolina, although a moderate number of winery visitors resided in neighboring states. From a marketing strategy perspective, opportunities exist for wineries to more fully penetrate the Baby Boomer and Generation X markets while simultaneously developing the Millennial market since only 5.8% of visitors identified themselves as Millennials. Unfortunately, the 2011 data indicates the impact of the recent national recession on "wine tourism" in North Carolina. Tourism visits from South Carolina, Florida, Virginia, Pennsylvania, Tennessee, and Georgia were all down when compared to the 2008 study. This indicates the need for the wine industry to invest in marketing to counter this trend.

Conclusion

The purpose of this research study was to measure visitor demographics, psychographics, travel party statistics, as well as visitor satisfaction with various aspects of North Carolina wineries and visitor spending. It also looked at consumer motivation to visit wineries and the influence of various information sources used to market the wineries. These demographics should prove useful to wineries as they seek to target customers in select geographic markets. Hopefully, the results of the 2008 and new 2011 study will be useful for North Carolina wine industry stakeholders as they continue to develop their business and refine marketing strategies.

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Appendix A Zip Code Origin Table				
3 Digit ZIP Code	**City/State**	**Frequency**	**Percent**	**Cumulative Percent**
275	Raleigh, NC	57	6.426156	6.426155581
272	Greensboro, NC	53	5.975197	12.40135287
283	Fayetteville, NC	51	5.749718	18.15107103
270	Greensboro, NC	50	5.636979	23.78804961
271	Winston-Salem, NC	45	5.073281	28.86133033
282	Charlotte, NC	44	4.960541	33.82187148
276	Raleigh, NC	40	4.509583	38.33145434
281	Charlotte, NC	39	4.396843	42.72829763
280	Charlotte, NC	31	3.494927	46.22322435
273	Greensboro, NC	25	2.818489	49.04171364
284	Fayetteville, NC	24	2.70575	51.74746336
277	Durham, NC	23	2.59301	54.34047351
286	Hickory, NC	19	2.142052	56.48252537
287	Asheville, NC	18	2.029312	58.51183766
274	Greensboro, NC	16	1.803833	60.3156708
300	North Metro, GA	13	1.465614	61.78128523
285	Kinston, NC	11	1.240135	63.02142052
296	Greenville, SC	9	1.014656	64.03607666
292	Columbia, SC	9	1.014656	65.05073281
278	Rocky Mount, NC	9	1.014656	66.06538895
295	Florence, SC	7	0.789177	66.85456595
201	Dulles, VA	7	0.789177	67.64374295
207	Southern, MD	7	0.789177	68.43291995
327	Mid-Florida, FL	6	0.676437	69.10935738
294	Hattiesburg, MS	5	0.563698	69.67305524
297	Charlotte, NC	5	0.563698	70.2367531
290	Columbia, SC	5	0.563698	70.80045096
334	West Palm Beach, FL	4	0.450958	71.25140924
405	Lexington, KY	4	0.450958	71.70236753
450	Cincinnati, OH	4	0.450958	72.15332582
293	Greenville, SC	4	0.450958	72.6042841
446	Canton, OH	4	0.450958	73.05524239
208	Suburban, MD	4	0.450958	73.50620068
217	Fredrick, MD	4	0.450958	73.95715896
342	Manasota, FL	3	0.338219	74.29537768
346	Tampa, FL	3	0.338219	74.63359639

3 Digit ZIP Code	City/State	Frequency	Percent	Cumulative Percent
326	Gainesville, FL	3	0.338219	74.97181511
320	Jacksonville, FL	3	0.338219	75.31003382
604	S. Suburban, IL	3	0.338219	75.64825254
289	Asheville, NC	3	0.338219	75.98647125
246	Bluefield, WV	3	0.338219	76.32468997
291	Columbia, SC	3	0.338219	76.66290868
484	Flint, MI	3	0.338219	77.0011274
440	Cleveland, OH	3	0.338219	77.33934611
444	Youngstown, OH	3	0.338219	77.67756483
234	Norfolk, VA	3	0.338219	78.01578354
235	Norfolk, VA	3	0.338219	78.35400225
216	Eastern Shore, MD	3	0.338219	78.69222097
88	Kilmer, NJ	3	0.338219	79.03043968
79	Kilmer, NJ	3	0.338219	79.3686584
941	San Francisco, CA	2	0.225479	79.59413754
802	Denver, CO	2	0.225479	79.81961669
750	North Texas, TX	2	0.225479	80.04509583
770	Houston, TX	2	0.225479	80.27057497
681	Omaha, NE	2	0.225479	80.49605411
337	St. Petersburg, FL	2	0.225479	80.72153326
336	Tampa, FL	2	0.225479	80.9470124
330	South Florida, FL	2	0.225479	81.17249154
331	Miami, FL	2	0.225479	81.39797069
349	West Palm Beach, FL	2	0.225479	81.62344983
335	Tampa, FL	2	0.225479	81.84892897
298	Augusta, GA	2	0.225479	82.07440812
629	Carbondale, IL	2	0.225479	82.29988726
374	Chattanooga, TN	2	0.225479	82.5253664
301	North Metro, GA	2	0.225479	82.75084555
422	Bowling Green, KY	2	0.225479	82.97632469
400	Louisville, KY	2	0.225479	83.20180383
618	Champaign, IL	2	0.225479	83.42728298
600	Palatine, IL	2	0.225479	83.65276212
468	Fort Wayne, IN	2	0.225479	83.87824126
247	Bluefield, WV	2	0.225479	84.10372041
435	Toledo, OH	2	0.225479	84.32919955
492	Jackson, MI	2	0.225479	84.55467869
430	Columbus, OH	2	0.225479	84.78015784

3 Digit ZIP Code	City/State	Frequency	Percent	Cumulative Percent
483	Metroplex, MI	2	0.225479	85.00563698
153	Pittsburgh, PA	2	0.225479	85.23111612
279	Rocky Mount, NC	2	0.225479	85.45659526
232	Richmond, VA	2	0.225479	85.68207441
206	Southern, MD	2	0.225479	85.90755355
223	Alexandria, VA	2	0.225479	86.13303269
200	Washington, DC	2	0.225479	86.35851184
166	Altoona, PA	2	0.225479	86.58399098
80	South Jersey, NJ	2	0.225479	86.80947012
70	DV Daniels, NJ	2	0.225479	87.03494927
112	Brooklyn, NY	2	0.225479	87.26042841
105	Westchester, NY	2	0.225479	87.48590755
117	Mid-Island, NY	2	0.225479	87.7113867
125	Mid-Hudson, NY	2	0.225479	87.93686584
64	Southern, CT	2	0.225479	88.16234498
907	Long Beach, CA	1	0.11274	88.27508455
853	Phoenix, AZ	1	0.11274	88.38782413
945	Oakland, CA	1	0.11274	88.5005637
973	Salem, OR	1	0.11274	88.61330327
856	Tucson, AZ	1	0.11274	88.72604284
794	Lubbock, TX	1	0.11274	88.83878241
804	Denver, CO	1	0.11274	88.95152198
784	Corpus Christi, TX	1	0.11274	89.06426156
782	San Antonio, TX	1	0.11274	89.17700113
786	Austin, TX	1	0.11274	89.2897407
774	North Houston, TX	1	0.11274	89.40248027
776	Beaumont, TX	1	0.11274	89.51521984
710	Shreveport, LA	1	0.11274	89.62795941
705	Lafayette, LA	1	0.11274	89.74069899
708	Baton Rouge, LA	1	0.11274	89.85343856
730	Oklahoma City, OK	1	0.11274	89.96617813
674	Salina, KS	1	0.11274	90.0789177
685	Lincoln, NE	1	0.11274	90.19165727
561	Kansas City, MO	1	0.11274	90.30439684
658	Springfield, MO	1	0.11274	90.41713641
553	Mid-Missouri, MO	1	0.11274	90.52987599
554	Minneapolis, MN	1	0.11274	90.64261556
980	Seattle, WA	1	0.11274	90.75535513

3 Digit ZIP Code	City/State	Frequency	Percent	Cumulative Percent
550	St. Paul, MN	1	0.11274	90.8680947
701	New Orleans, LA	1	0.11274	90.98083427
325	Pensacola, FL	1	0.11274	91.09357384
363	Dothan, AL	1	0.11274	91.20631342
302	Atlanta, GA	1	0.11274	91.31905299
339	Ft. Myers, FL	1	0.11274	91.43179256
333	Ft. Lauderdale, FL	1	0.11274	91.54453213
323	Tallahassee, FL	1	0.11274	91.6572717
344	Gainesville, FL	1	0.11274	91.77001127
322	Jacksonville, FL	1	0.11274	91.88275085
310	Macon, GA	1	0.11274	91.99549042
308	Augusta, GA	1	0.11274	92.10822999
347	Orlando, FL	1	0.11274	92.22096956
313	Savannah, GA	1	0.11274	92.33370913
381	Memphis, TN	1	0.11274	92.4464487
370	Nashville, TN	1	0.11274	92.55918828
622	St. Louis, MO	1	0.11274	92.67192785
371	Nashville, TN	1	0.11274	92.78466742
474	Bloomington, IN	1	0.11274	92.89740699
452	Cincinnati, OH	1	0.11274	93.01014656
617	Bloomington, IL	1	0.11274	93.12288613
478	Terre Haute, IN	1	0.11274	93.2356257
605	Fox Valley, IL	1	0.11274	93.34836528
601	Carol Stream, IL	1	0.11274	93.46110485
535	Madison, WI	1	0.11274	93.57384442
530	Milwaukee, WI	1	0.11274	93.68658399
460	Indianapolis, IN	1	0.11274	93.79932356
494	Grand Rapids, MI	1	0.11274	93.91206313
490	Kalamazoo, MI	1	0.11274	94.02480271
488	Lansing, MI	1	0.11274	94.13754228
496	Traverse City, MI	1	0.11274	94.25028185
305	Athens, GA	1	0.11274	94.36302142
306	Athens, GA	1	0.11274	94.47576099
377	N. Knoxville, TN	1	0.11274	94.58850056
379	N. Knoxville, TN	1	0.11274	94.70124014
288	Asheville, NC	1	0.11274	94.81397971
376	Johnson City, TN	1	0.11274	94.92671928
410	Cincinnati, OH	1	0.11274	95.03945885

3 Digit ZIP Code	City/State	Frequency	Percent	Cumulative Percent
255	Huntington, WV	1	0.11274	95.15219842
261	Parkersburg, WV	1	0.11274	95.26493799
263	Clarksburg, WV	1	0.11274	95.37767756
240	Roanoke, VA	1	0.11274	95.49041714
454	Dayton, OH	1	0.11274	95.60315671
431	Columbus, OH	1	0.11274	95.71589628
432	Columbus, OH	1	0.11274	95.82863585
433	Columbus, OH	1	0.11274	95.94137542
448	Mansfield, OH	1	0.11274	96.05411499
481	Detroit, MI	1	0.11274	96.16685457
480	Metroplex, MI	1	0.11274	96.27959414
260	Wheeling, WV	1	0.11274	96.39233371
447	Canton, OH	1	0.11274	96.50507328
265	Clarksburg, WV	1	0.11274	96.61781285
152	Pittsburgh, PA	1	0.11274	96.73055242
238	Richmond, VA	1	0.11274	96.843292
237	Portsmouth, VA	1	0.11274	96.95603157
222	Arlington, VA	1	0.11274	97.06877114
212	Baltimore, MD	1	0.11274	97.18151071
218	Salisbury, MD	1	0.11274	97.29425028
199	Wilmington, DE	1	0.11274	97.40698985
169	Williamsport, PA	1	0.11274	97.51972943
210	Linthicum, MD	1	0.11274	97.632469
140	Buffalo, NY	1	0.11274	97.74520857
197	Wilmington, DE	1	0.11274	97.85794814
198	Wilmington, DE	1	0.11274	97.97068771
86	Trenton, NJ	1	0.11274	98.08342728
85	Trenton, NJ	1	0.11274	98.19616685
185	Scranton, PA	1	0.11274	98.30890643
184	Scranton, PA	1	0.11274	98.421646
78	NNJ Metro, NJ	1	0.11274	98.53438557
72	Elizabeth, NJ	1	0.11274	98.64712514
68	Stamford, CT	1	0.11274	98.75986471
66	Bridgeport, CT	1	0.11274	98.87260428
120	Albany, NY	1	0.11274	98.98534386
11	Springfield, MA	1	0.11274	99.09808343
63	Hartford, CT	1	0.11274	99.210823
29	Providence, RI	1	0.11274	99.32356257

3 Digit ZIP Code	City/State	Frequency	Percent	Cumulative Percent
27	Providence, RI	1	0.11274	99.43630214
20	Brockton, Ma	1	0.11274	99.54904171
21	Boston, MA	1	0.11274	99.66178129
32	Manchester, NH	1	0.11274	99.77452086
19	Middlesex, MA	1	0.11274	99.88726043
40	Southern, ME	1	0.11274	100
Total		887	100	

Appendix B Comparison Between Present Study and 2008 Study (Evans & Pollard)			
Study Variable	**2008 Study**	**2011 Study**	**Report Pages for Data**
Wineries	13	11	8/5
Sample Size	925	903	8/5
New Visitor	61%	52%	13/5
Return Visitor	39%	48%	13/5
Travel Party Size	2.85	3.68	11/7
Day Trip	52%	63%	12/7
Over-Night	48%	37%	12/7
1 Night	10%	9.1%	12/7
2-4 Nights	26%	18.5%	12/7
Over 5 Nights	12%	7.6%	12/7
Over-Night Days	2 to 4 at 26%	2.6	12/7
Average Age	47	47	9/12
BS College Educated	63%	71%	9/13
Household Income	up to $75,000 - 40%	up to $75,000 - 54%	10/8
Trip Spending	$176	$192	12/17
Lodging - First Choice	Hotel or Motel	Hotel or Motel	8/13
Lodging- Second Choice	Family/Friend	Family/Friend	8/13
Trip Motivation # 1	Taste Wine	Taste Wine	9/23
Trip Motivation # 2	Buy Wine	Buy Wine	9/23
Winery Satisfaction	Very Satisfied	Very Satisfied	10/20
Wine Qt. Satisfaction	Very Satisfied	Very Satisfied	10/20
Info. Sources Used # 1	Family/Friend	Family/Friend	10/18
Info Sources Used # 2	Internet	Internet	10/18
NC Visits	53%	64%	39/13
SC Visits	8%	4%	“
FL Visits	8%	5%	“
VA visits	4%	2%	“
PN-visits	3%	1%	“
TN-visits	2%	1%	“
GA-visits	2%	1%	“