Study of Visitors to North Carolina Wineries 2012

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Study of Visitors to North Carolina Wineries 2012

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EXECUTIVE SUMMARY

The wine and grape industry generates a significant economic impact in North Carolina's rural communities. In 2009 the wine and grape industry generated 7,600 jobs and $1.2 billion in total annual economic impact in the state. Particularly noteworthy is the fact that NC's wine tourism revenue grew 27% between 2005 and 2009, with 2009 data indicating 1.26 million wine tourist visits and $156 million in wine tourism revenue.

To better understand the market and provide services to winery visitors, the NC Department of Commerce and the University of North Carolina at Greensboro conducted study of winery visitors. For the purpose of this research, anyone who visits a winery (regardless of their place of residence) is considered a winery visitor. Individuals who are from outside of the local community are defined in this study as tourists. The intent of this study was to develop a profile of people visiting North Carolina wineries in order to inform marketing and outreach strategies for the purpose of increasing State and local wine-based tourism activity and maximizing revenues. The study had four objectives:

- To develop demographic, psychographic, and trip and visitor profiles of visitors to North Carolina's wineries,
- To gauge wine tourists' level of understanding and knowledge of wine and if and how individuals' wine competency impacts their expectations and perceptions of quality during visits to wineries and tourism facilities and attractions in NC,
- To identify the information gathering and decision process used by wine tourists to select NC winery regions and wineries to visit, and
- To identify major mechanisms by which visitors to NC wineries communicate their intentions and experiences to others.

Researchers surveyed 832 visitors at 23 wineries across the state of North Carolina between May and August 2012. The sampling plan stratified the entire set of NC wineries across certain winery attributes in order to reduce attribute bias. This report represents the findings and recommendations from that study.

Key Findings

- Visitor Profile
  - 80% of winery visitors indicated that they were tourists (non-residents) to the community.
  - 73% of winery visitors (local residents and tourists) were from North Carolina
  - Visitors from out of state (e.g., Georgia, South Carolina, Tennessee and Virginia) were widely dispersed with micro clusters of visitors from the Atlanta area, Richmond and Roanoke, VA and the Greenville-Spartanburg, SC area.
  - Winery visitors are predominately white educated females averaging 45 years of age.
  - 37.5% of winery visitors had an annual household income of $100,000 or more.
    - Over half (52.5%) of Overnight Tourists make $100,000 or more annually, while only one-third (33.2%) of Day Tourists report similar household income.

- Trip profile
  - 38.7% of tourists indicated that they were staying overnight in the area.
    - Average length of stay reported was 2.1 days
  - High level of repeat visitors was noted
    - 61.3% of tourists had visited the area in the past
    - 29.1% of tourists reported that this was their first visit to a North Carolina winery

- Median travel party size was 2.0 people of legal drinking age (21years +)
- 42.2% of tourists indicated that the primary purpose of their trip was winery-related.
  - There were, however, major differences between Day tourists and Overnight tourists
    - 60.2% of Day tourists selected winery-related activities as their primary trip purpose
    - 12.4% of Overnight tourists selected winery-related activities as their primary trip purpose
      - 52.3% of the Overnight tourists indicated Vacation as their primary purpose

- Wine Tourism Profile
  - On average respondents reported visiting 5.23 wineries over the past year (2011-2012).
  - Top Regional Features prompting visit to the study winery
    1. The wine region is close to my home
    2. There are a large number of wineries to visit in the immediate area
    3. Fine dining and gourmet restaurants were important to their selection of the area to visit
  - Top Winery Features prompting visit to the study winery
    1. Good customer service
    2. Knowledgeable winery staff
    3. History/story linked to the winery
  - Top Winery Activity/ Benefit prompting visit to the study winery
    1. To taste NC wine
    2. To have a day out
    3. To rest and relax
    4. To socialize with friends and family
    5. To enjoy the beauty of rural NC vineyards
  - Customer service has been shown as a critical success factor for wineries

- Wine Knowledge and Preference
  - 56% of visitors indicated their level of knowledge to range from basic to no wine knowledge in any of the areas.
    - individuals reporting higher levels of wine knowledge claimed they would pay more for a bottle of wine
    - 72.6% of visitors indicated that they enjoyed the taste of NC wine
      - 61.7% consider NC wines to be of high quality.

- Future Intentions
  - 84.5% of winery visitors indicated that they were likely to revisit a NC winery in the future
    - The best predictor of future visits to the winery was good customer service
  - 88.5% of winery visitors indicated that they were likely to recommend the winery to others.
    - The best predictor of visitors giving a recommendation about the winery was good customer service

Key Recommendations

1. Customer Service
   - Wine variety and quality should be considered an "order qualifier" (necessary to be a player in the industry) and good customer service is an "order winner" (the main competitive advantage) for NC wineries
     - It is critical for all wine/winery stakeholders to acknowledge the extreme importance of customer service to the overall visitor experience and to the generation of positive word-of-mouth marketing for the NC wine industry and all of its wineries.
       - Wineries must provide a high quality tasting room experience to their visitors.
         - Tasting room staff need to be professional, courteous, and knowledgeable about wine, specifically about the wine from the winery at which they are working. Offering anecdotal or historical information about the winery or the region to visitors and the having the ability to personalize the "story" of the wine and winery will go a long way in enhancing visitor experiences.
       - Wineries should consider designating areas where couples and groups can sit and socialize with each other while enjoying the wine and winery.
       - Wineries should proactively educate their visitors about their wines to improve and increase their knowledge and understanding of wine.
       - In view of the critical finding that customer service drives winery outcomes, a key economic development strategy will be to target funding sources and programs for enhancing cellar door services and tasting room staff training.
     - Without good customer service the NC wine industry could lose a major opportunity to enhance a competitive advantage over other wine producing states and regions.

2. Market Focus and Cooperation
   - Individual wineries may want to focus on the local and day visitors while the NCDTFSD and local DMOs might wish to focus more on the overnight market.
     - Winery websites should indicate their proximity to others in the vicinity to increase convenience for visitors.
     - Wineries should consider developing/ enhancing special events, such as holiday specials to attract greater numbers of visitors.
       - Investment in wine-based events should be localized at wineries to develop consumer loyalty and repeat visitation.

3. Internet
   - Local DMOs should advertise clusters of wineries within 15-20 minutes of each other or within the region, showing their proximities to each other.
   - State and wineries evaluate the usefulness and design of winery websites to make sure they follow best practice in website design and functionality.
     - Websites should contain a part of the history or story of the winery, so that visitors can begin to get a feel and affinity to the winery.
     - All wineries need to develop/ enhance a Facebook page and designate someone to manage and keep the site up-to-date.
     - Winery websites should include travel times from major cities to attract visitors from locations close to major population centers.

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1. INTRODUCTION

North Carolina's diverse landscape with its variety of climate and soil types provides and nourishes an excellent environment for growing grapes. Since inception of its first commercial winery in 1835, North Carolina (NC) has become the home of more than 100 wineries and is the 9th largest wine-producing state in the country. It is also ranked as one of the top five state destinations for wine and culinary tourism activities in the U.S. (TIA, 2008). Due to a varied and nurturing environment, a wide variety of grapes is grown in NC. Growers in the western and Piedmont regions plant more European-style vinifera varieties while tmuscadine grapes native to N.C. are grown mostly in the east. The Yadkin Valley, Swan Creek, and Haw River were named as American Viticultural Areas (AVA) by the Alcohol and Tobacco Tax and Trade Bureau (TTB) that designates U.S. wine grape-growing regions.

The wine and grape industry has generated significant economic growth in NC's rural communities and has natural linkages with the state's tourism industry. Based on a 2009 study of the economic impact of wine on NC (Frank, Rimerman, + Co., 2011), the combined wine and grape industry generated 7,600 jobs and $1.2 billion in total annual economic impact in the state. Particularly noteworthy is the fact that NC's wine tourism revenue grew 27% between 2005 and 2009, with 2009 data indicating 1.26 million wine tourist visits and $156 million in wine tourism revenue. The continued growth of wine tourism is clearly important to the state's economy in three ways:

(1) The majority of NC wineries are small, producing fewer than 5,000 gallons annually. However, wineries of all sizes can leverage their existing facilities through the addition of service-based tourist activities that generate additional sources of revenue at the wineries.

(2) Wineries can also cooperate with tourism industry partners in surrounding communities to package and promote wine tourism in ways that encourage longer visitor stays in the region and increase tourism revenue in these areas.

(3) Wine tourism adds a unique and differentiated type of activity to NC's tourism product mix and therefore permits the state to expand its portfolio of tourism assets and lessen its dependence on any single tourism driver.

Past research indicated that 50% of visitors to wineries are day trippers, i.e., those not staying overnight (Evans, Pollard, & Holder, 2008). Research shows that if these one day visitors could be converted to overnight visitors, the economic impact of their visit would more than double and longer stays would distribute the direct economic impact of wine tourism to a greater number of stakeholders. For example, in 2010 the average travel party staying overnight in NC spent $502 during their trip (NCDTFSD, 2011). To accomplish conversion of day visits to overnight stays, wine tourists must be shown the value of spending more time in the region and of engaging more deeply with the wineries and visiting other attractions located in the region.

Effective marketing and outreach strategies can help to increase state and local wine-based tourism activity through innovative clustering of attractions and amenities that appeal to wine tourist interests and motivations. Clear demographic, psychographic, and trip/visitor profiles of visitors to NC's wineries, assessment of their levels of understanding/knowledge of wine, determination of the process by which visitors select NC winery regions and individual wineries, and identification of major mechanisms by which visitors communicate their intentions and experiences will be critical to the development of effective marketing strategies.

2. PURPOSE OF THE STUDY

2.1 Broad Study Aim

To develop a profile of tourists visiting North Carolina wineries in order to inform strategic marketing and outreach strategies for the purpose of increasing State and local wine-based tourism activity and maximizing revenues.

2.2 Primary Study Objectives

- To develop demographic, psychographic, and trip and visitor profiles of visitors to North Carolina's wineries,
- To gauge wine tourists' level of understanding and knowledge of wine and if and how individuals' wine competency impacts their expectations and perceptions of quality during visits to wineries and tourism facilities and attractions in NC,
- To identify the information gathering and decision process used by wine tourists to select NC winery regions and wineries to visit, and
- To identify major mechanisms by which visitors to NC wineries communicate their intentions and experiences to others.

3. METHODOLOGY

3.1 Research Design

Data collection method: Cross-sectional data were collected using structured self-administered paper-and-pencil questionnaires, during a series of winery-based visitor intercept activities across selected wineries in North Carolina. A member of the research team approached winery visitors and asked them if they would be willing to participate in the study. To increase the response rate, study participants who completed surveys were entered into a drawing to win one of two gifts worth $50 each (in the form of pre-paid Visa cards), as an incentive for participating.

Sample description: From a total of 1,028 winery visitors approached by a team of field researchers, a total of 832 visitors (from both NC and out-of-state) agreed to participate, following enrollment screening to assure they were 18 years and older and an onsite visitor to a NC winery during the course of the study collection period. A 81% response rate was achieved.

Data collection sites: Data were collected from visitors at 23 wineries across North Carolina. . From the sampling frame of 117 NC wineries identified by the NC Department of Commerce, funding and logistical constraints as well as the study protocol required the use of a subset of wineries as final data collection sites. The sampling plan stratified the entire set of NC wineries across certain winery attributes in order to reduce attribute bias. Stratification factors for sampling design were winery location, winery trail participation, size of winery, grape variety, American Viticultural Area (AVA) affiliation, Internet presence, types of onsite tourist services and winery events, and inclusion in the NC Visitor's Guide. The final subset of wineries selected included those representing each of the levels of the aforementioned winery attributes.

Wineries selected for data collection were contacted to gain formal permission from winery owners. An announcement about the study was made at the 2012 NC Winegrowers' Association meeting, which helped winery owner understand the purpose and nature of the research study. UNCG researchers personally made contact with selected wineries to explain the purpose and benefits of the study and obtain their permission for field researchers to collect data at their premises. Some wineries were contacted several times, but failed to participate. Participating wineries that served as study sites are listed in Table 1 below.

Table 1. Wineries that participated in the study.

1861 Farmhouse	Lake Road Winery
Adams Vineyards	Laurel Gray Vineyards
Bannerman Vineyard	Old North State Winery
Benjamin Vineyards & Winery	Raffaldini Vineyards
Biltmore Winery	RagApple Lassie Vineyards
Chatham Hill Winery	Round Peak Vineyards
Cypress Bend Vineyards	Shelton Vineyards
Duplin Winery	Silver Coast Winery
Germanton Vineyard & Winery	The Winery at Iron Gate Farm
Grove Winery & Vineyards	Westbend Vineyards
Hanover Park Vineyard	Zimmerman Vineyards
Hinnant Family Vineyards & Winery	

Data were collected at selected times when winery visitation was at a peak: beginning early spring (late-March) and ending mid-summer (mid-July) and primarily on weekends (between Friday and Sunday). Six (6) UNCG students, all over 21, were hired and trained to serve as the field research team. Their training, by faculty researchers, covered subject screening, recruitment, refusal conversion, informed consent, and data collection procedures. The field researchers were then dispatched to selected wineries around the state. Faculty researchers monitored the quality of the collected data and visits to wineries, and provided ongoing supervision to the field team.

3.2 Instrument development

Valid instruments used to profile wine tourists in Arizona, Australia, California, Canada, Georgia, Michigan, New York, New Zealand, Texas, and Washington were consulted in the development of the NC Winery Visitor Study Questionnaire. Relevant questions from extant instruments were adopted and new questions were developed to address North Carolina's specific needs. The process of instrument development, as part of the preparatory work, went through several stages, involving both UNCG and NCDoC researchers. Upon reaching a consensus between the two groups in February, the completed survey was pilot tested (for cognitive testing, timing, and statistical validation) and required revisions were made. The final survey instrument includes the following general question categories:

1. *Demographic profile:* age; gender; race and ethnicity; marital and family status, life-cycle stage; education; household income; occupation; and place of origin (in/out-of-state);
2. *Psychographic profile:* values (attitudes, beliefs); lifestyles (activities, interests, opinions); personality type; motives and expectations; and media preferences;
3. *Trip/visitor profile:* size of travel party; length of stay; mode of travel; first-time vs. repeat visitor; intentions for future visits; accommodation choices; food and beverage choices; wineries visited; other attractions or special events visited; other activities participated in; information sources used (print, broadcast, Internet); and expectations linked to winery visits; and
4. *Wine-related knowledge and behavior:* wine preferences; wine expertise level (amateur-connoisseur); wine involvement (e.g., activities, special events, membership in groups or clubs); and prior visits to same or other winery destinations.

3.3 Data analysis

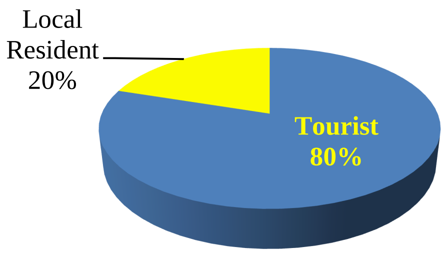
Descriptive analysis was used to profile visitors in terms of: demographic profile, psychographic profile, trip/visitor profile, and wine-related knowledge and behavior. Chi-squares, T-tests, and ANOVA techniques were used to compare subset types of visitors (e.g., in-state/out-of-state, socioeconomic classes, psychographic segments). Decision-Tree Analysis (SPSS v.20) was used to identify predictors of wine tourist behaviors and choices. The Exhaustive CHAID algorithm was used to identify visitor characteristics that best predict the dependent variables (e.g., length of stay, amount of money spent, number of wineries visited). The results of the Decision-Tree Analysis have produced an output format that demonstrates, both statistically and visually, interaction between tourist characteristics and their behaviors in the context of winery visitation.

4. RESULTS

4.1 Visitor Profile

A total of 832 winery visitors agreed to participate in the study. Out of all winery visitors 80% indicated that they were tourist (non-residents) to the community (see Figure 1). For the purpose of this study any individual who visited the winery will be called a visitor; individuals who are non-residents will be called tourists.

Figure 1: Visitor Type



The majority of winery visitors (all respondents) was from NC (73.3%). Looking specifically at winery tourists, most of the respondents were still from NC (66.7%). In the case of overnight tourists, a large percentage (43.5%) were from within NC, followed by tourists from South Carolina, Georgia, Virginia, Florida, Tennessee, Ohio, Pennsylvania, Massachusetts, West Virginia, Kentucky, and Michigan respectively. The state of origin for NC winery tourists, for the most part, mirrors what the NC Division of Tourism, Film and Sports Development (NCDTFSD) reported in (2011) for the state's tourism in general. The top six states of origin were the same in both studies, yet the rank order of states generating the most tourists to North Carolina did differ between the two studies. Massachusetts, West Virginia, Kentucky, and Michigan moved into the top 12 states of origin compared to 2011 results and New York, New Jersey, Maryland, and Texas dropped out (see Table 2).

Table 2: Tourist State of Origin

Rank	State	All Tourists	Overnight Tourists	Rank	State	All Tourists	Overnight Tourists
1	NC	66.7%	43.5%	16	NY	0.5%	0.8%
2	SC	5.7%	7.6%	17	AL	0.3%	0.8%
3	VA	4.8%	6.8%	17	CT	0.3%	0.8%
4	TN	3.4%	5.5%	19	DE	0.3%	0.4%
5	GA	3.2%	7.2%	20	MS	0.3%	0.0%
6	FL	2.6%	5.9%	21	AR*	0.2%	0.4%
7	PA	2.3%	3.8%	21	OK*	0.2%	0.4%
8	OH	1.9%	3.8%	21	NM*	0.2%	0.4%
9	WV	1.3%	1.7%	21	ME*	0.2%	0.4%
10	KY	1.1%	1.7%	21	RI*	0.2%	0.4%
11	MI	1.0%	1.7%	21	IN*	0.2%	0.4%
12	TX	1.0%	0.8%	27	IA*	0.2%	0.0%
13	MA	0.8%	2.1%	27	MO*	0.2%	0.0%
14	MD	0.5%	1.3%	27	WA*	0.2%	0.0%
14	CA	0.5%	1.3%				

* States with only one respondent

Figure 2

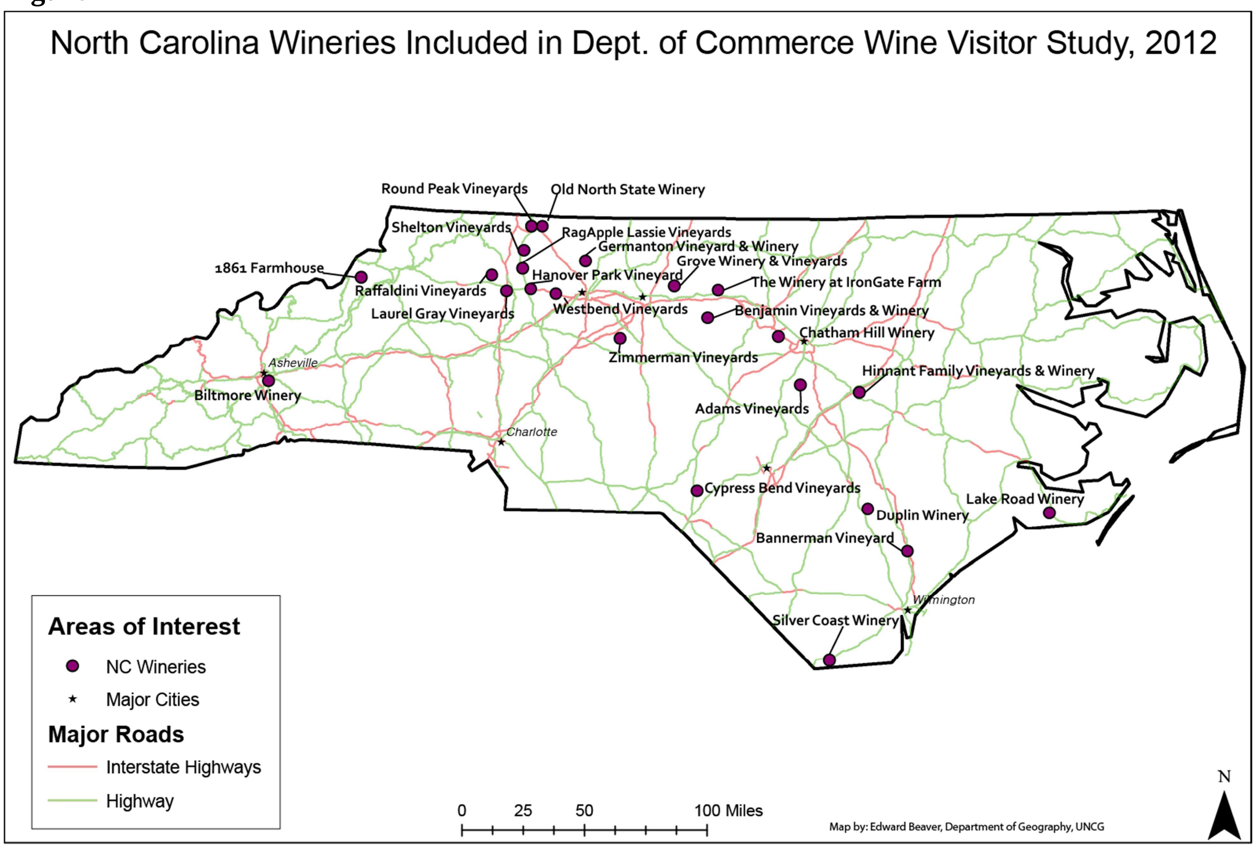
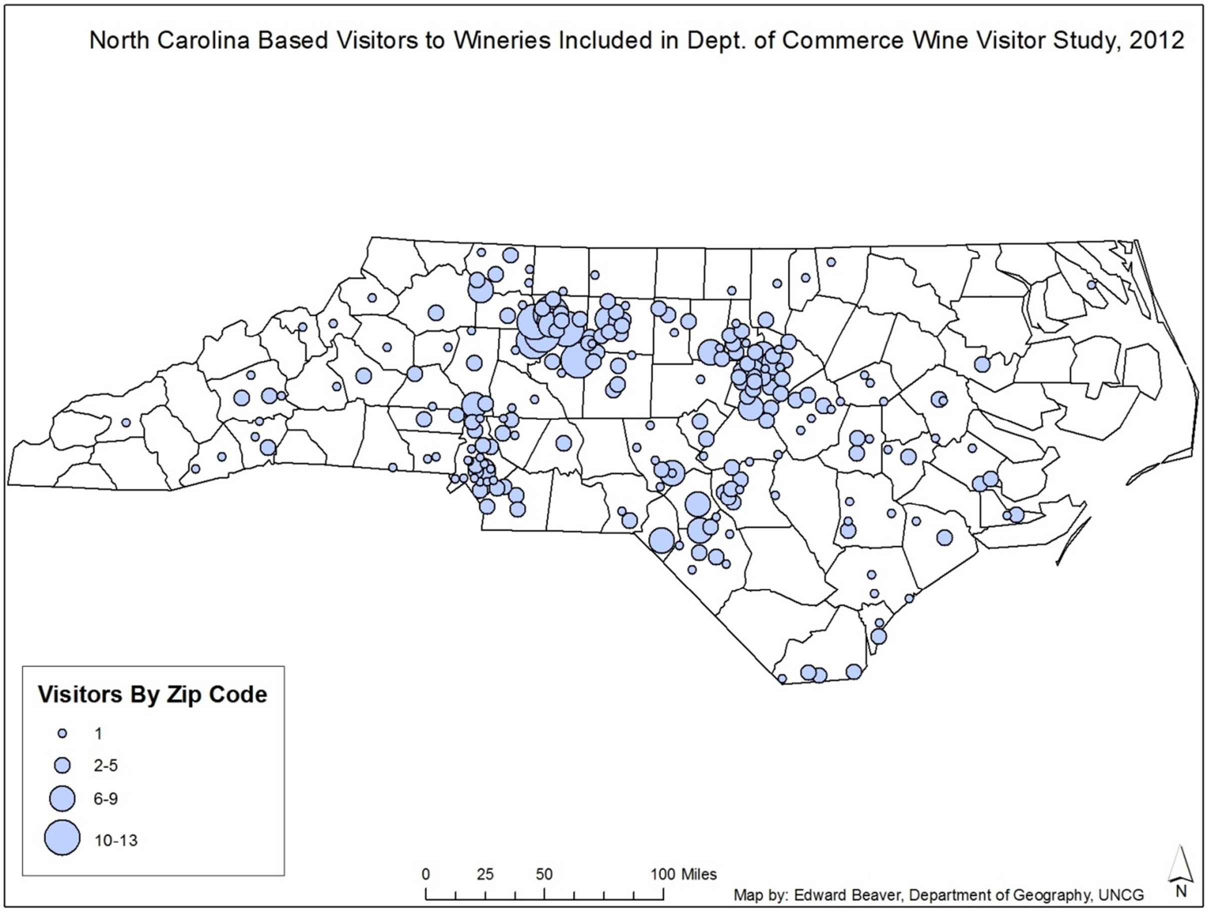


Figure 2 illustrates the spatial distribution of the wineries that participated in this study. The analysis included a stratified sample that represented a broad range of wineries that extended from Biltmore Winery in the Mountain West to Lake Road Winery on the East Coast, and from Round Peak Vineyards near the Virginia state line to Silver Coast Winery near the South Carolina state line. It is clear from the sample sites that North Carolina wineries comprise an industry with statewide economic effects.

Figure 3

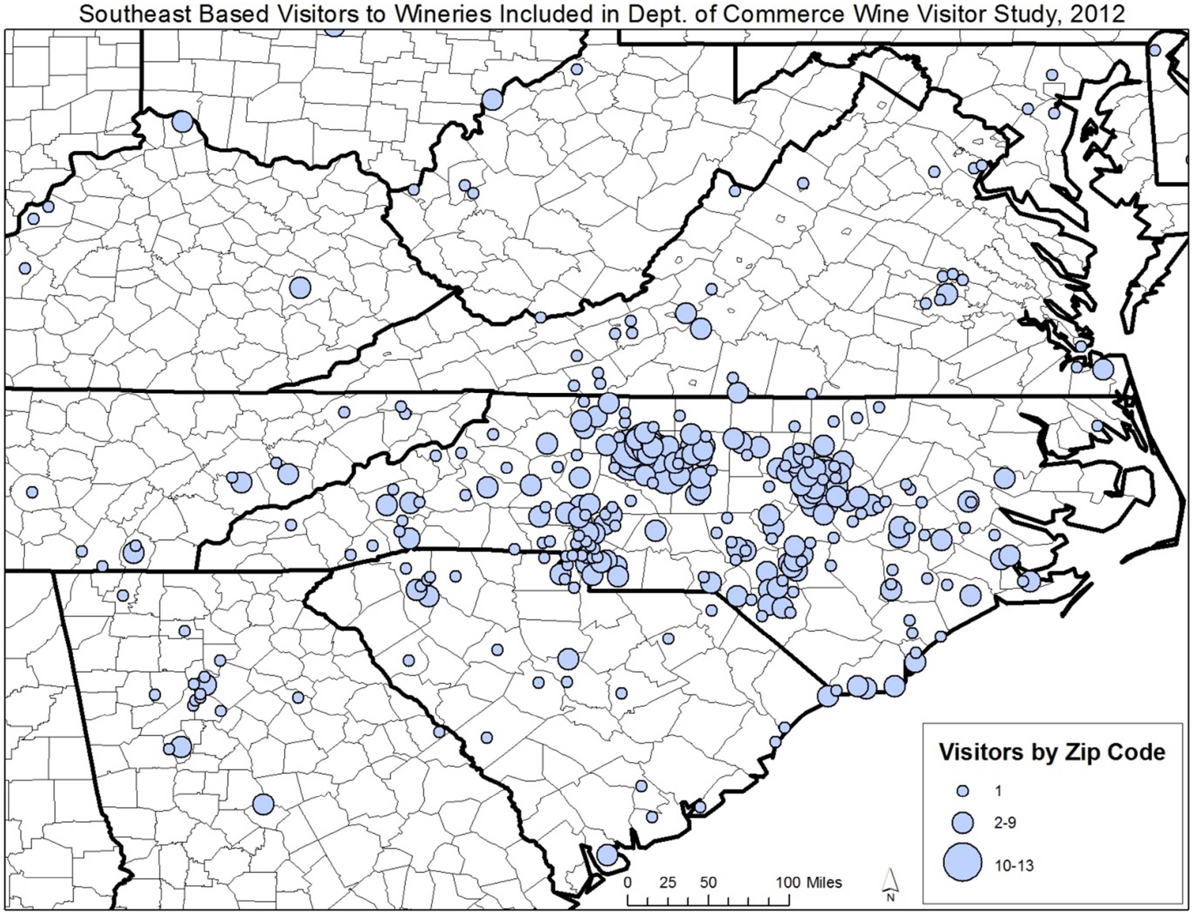


The geographic distribution of visitor demand for North Carolina illustrated in Figure 3 suggests a statewide industry with statewide economic effects. The 23 wineries included in this study collectively generated visitation from approximately three out of every four counties in North Carolina. That said, given the preponderance of wineries located in the Yadkin Valley area east of Winston-Salem, it is not surprising that the Piedmont Triad region generated a disproportionate number of wine visitors followed by the Research Triangle area, and the Charlotte area.

A good example of this geographic concentration can be seen when examining those zip codes that generated more than ten visitors. Most of these zip codes are located in either Forsyth County (4) or Davidson (1) and Davie County (1) and most of the visitors from these six zip codes travelled short distances to visit a winery. For example, nearly two-thirds of the winery visitors from three of the zip codes located in Forsyth County (i.e., 27012, 27023, and 27107) visited the Westbend Vineyards in nearby Lewisville, NC just west of Winston-Salem. Additionally, 8 of the 12 visitors from the 27360 zip code in Davidson County visited the nearby Zimmerman Vineyards. The phenomenon of localized markets partly explains the cluster of winery visitors in southeastern North Carolina in Hoke County (i.e., zip code 28376), Moore County (28387) and Scotland County (28352). Twenty one of the twenty three visitors from these three zip codes visited the Cypress Bend Vineyards located in nearby Laurinburg in Scotland County. Overall, most of the wineries appeared to generate largely local markets since most visitors tended to visit nearby wineries rather than more distant ones.

Figure 4

Southeast Based Visitors to Wineries Included in Dept. of Commerce Wine Visitor Study, 2012



Map by: Edward Beaver, Department of Geography, UNCG

Although two-thirds of the visitors to the North Carolina wineries included in this study originated in-state, a substantive minority of visitors were from out-of-state (e.g., Georgia, South Carolina, Tennessee and Virginia). It is clear from Figure 4 that the geographic distribution of out-of-state visitors is widely dispersed with micro clusters of visitors from the Atlanta area, Richmond and Roanoke, VA and the Greenville-Spartanburg, SC area.

4.2 Demographic Profile

In general the results show that winery visitors are predominately white educated females averaging 45 years of age. Age ranged from 19 to 90 years with an average age of 45.6 years. The tourist subset showed a markedly similar age profile. An overwhelming majority of the respondents were white

(80.7%), followed by Black or African American (10.5%), with other ethnic/racial categories below 4% (see Table 2).

Almost three-fourths of all respondents (74.2%) indicated that they hold some form of college or community college degree. Looking specifically at tourists to the area, a higher percentage of Overnight tourists (73.7%) had *completed college with a Bachelor's Degree* or *post graduate degree* compared to Day tourists (61.3%). A Chi-Square test indicates the differences in education level between Overnight and Day Tourists is statistically significant (p=.01) (see Table 2).

Most of the respondents indicated that they were *Professional/Executive* (56.4%). A comparison of day tourists to overnight tourists showed similar results in that *Professional/Executive* was by far the most common occupation reported. Small differences were noted as follows: 3.2% of Day tourists self-identified as *Homemakers* compared to 6.0% for Overnight tourists. Also, 10.1 % Day tourists reported their occupation as *Clerical/Sales/Craftsman/Factory Worker* compared to 5.5% for Overnight tourists (see Table 2).

Over one third (37.5%) of respondents reported an annual household income of $100,000 or more. Similar results were found for the tourist subset. Of importance here is the statistically significant difference in household income between Day tourists and Overnight tourists (p=.00). Slightly over half (52.5%) of Overnight Tourists make $100,000 or more annually, while only one-third (33.2%) of Day Tourists report similar thresholds of household income (see Table 2).

Table 2: Demographic Profile of Study Respondents

	All Respondents	All Tourists	One Day Tourists	Overnight Tourists
Mean Age	45.6	45.9	46.5	45.1
Gender				
Male	31.2%	30.8%	28.8%	34.1%
Female	68.8%	69.2%	71.2%	65.9%
Occupation				
Professional/ Executive	56.4%	57.0%	55.7%	59.0%
Retired	11.4%	12.0%	11.8%	12.4%
Clerical/ Sales/ Craftsman/ Factory Worker	9.3%	8.3%	10.1%	5.5%
Self-employed	7.5%	7.6%	7.5%	7.8%
Student (Full Time)	4.4%	4.8%	4.3%	5.5%
Other	4.0%	3.7%	4.3%	2.8%
Homemaker	3.9%	4.2%	3.2%	6.0%
Military	1.6%	1.4%	1.7%	0.9%
Unemployed	1.3%	0.9%	1.4%	0.0%
Race/ethnic group				
White	80.7%	80.6%	78%	84.9%
Black or African American	10.5%	10.5%	12.2%	7.8%
Multi-racial/ multi-ethnic	3.1%	3.4%	3.8%	2.8%
Hispanic	2.3%	1.8%	1.4%	2.3%
American Indian or Alaska Native	1.9%	2.0%	3.2%	0.0%
Asian	1.1%	1.2%	0.9%	1.8%
Other	0.4%	0.4%	0.6%	0.0%
Native Hawaiian or Other Pacific Islander	0%	0.2%	0.0%	0.5%
Education Level				
High school or less	7%	7.5%	9.5%	4.1%
Some college – no degree	18.9%	16.5%	19.1%	12.4%
Completed college with an Associate's Degree	11.1%	9.9%	10.1%	9.7%
Completed college with a Bachelor's Degree	35.9%	35.9%	34.4%	38.2%
Post graduate college	27.1%	30.2%	26.9%	35.5%
Household Income				
less than $25,000	4.7%	4.6%	5.6%	3.0%
$25,000-$49,999	19.5%	17.2%	20.2%	12.4%
$50,000-$74,999	19.5%	18.7%	19.6%	17.4%
$75,000-$99,999	18.8%	18.9%	21.4%	14.9%
$100,000-124,999	16.2%	16.8%	14.6%	20.4%
$125,000-$149,999	7.4%	7.8%	6.8%	9.5%
$150,000-$199,999	7.3%	8.4%	7.1%	10.4%
$200,000+	6.6%	7.5%	4.7%	11.9%

Respondents reported listening to a wide range of music with *Rock*, *Country* and *Oldies* representing the top three preferences. Preference for social media sites tended to be more narrowly focused, with a large majority (65.2%) preferring Facebook (see Table 3).

Table 3: Favorite type of music and social media site

Type of Music		Social Media Site	
Rock	36.9%	Facebook	65.2%
Country	36.5%	Don't visit social media sites	23.6%
Oldies	35.6%	Google+	14.5%
Top 40	29.7%	Linked-in	12.4%
Rhythm and Blues	29.5%	Twitter	9.9%
Adult contemporary	27.0%	Personal blog	3.9%
Classical	20.5%	Other	2.2%
Christian	18.0%		
Hip Hop	14.6%		
Rap	8.6%		
Heavy Metal	6.5%		
Other	5.9%		
Jazz	4.2%		
Bluegrass/ Folk	2.3%		

4.3 Trip Profile

Eighty percent of respondents (n= 661) indicated that they were not from the area where the winery they were visiting was located. Of these respondents we define as tourists, 38.7% indicated that they were staying overnight in the area. The average length of stay reported was 2.1 days and 1.2 nights. Most of the tourists (61.3%) had visited the area in the past and 29.1% of tourists reported that this was their first visit to a North Carolina winery (see Figures 5 and 6).

Figure 5: First Visit to Area

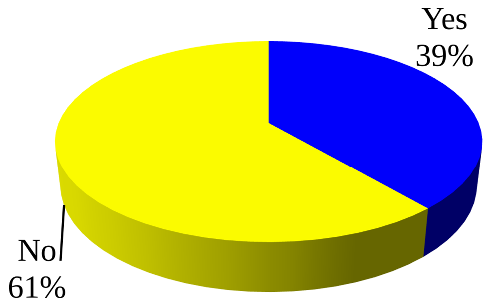
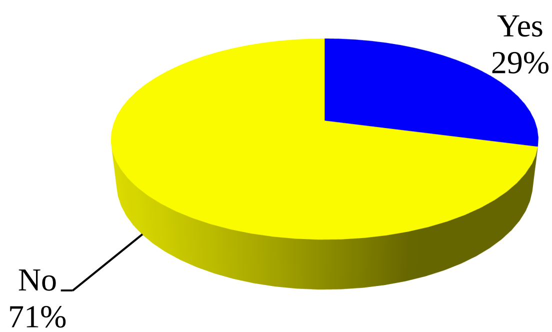


Figure 6: First Visit to NC Winery



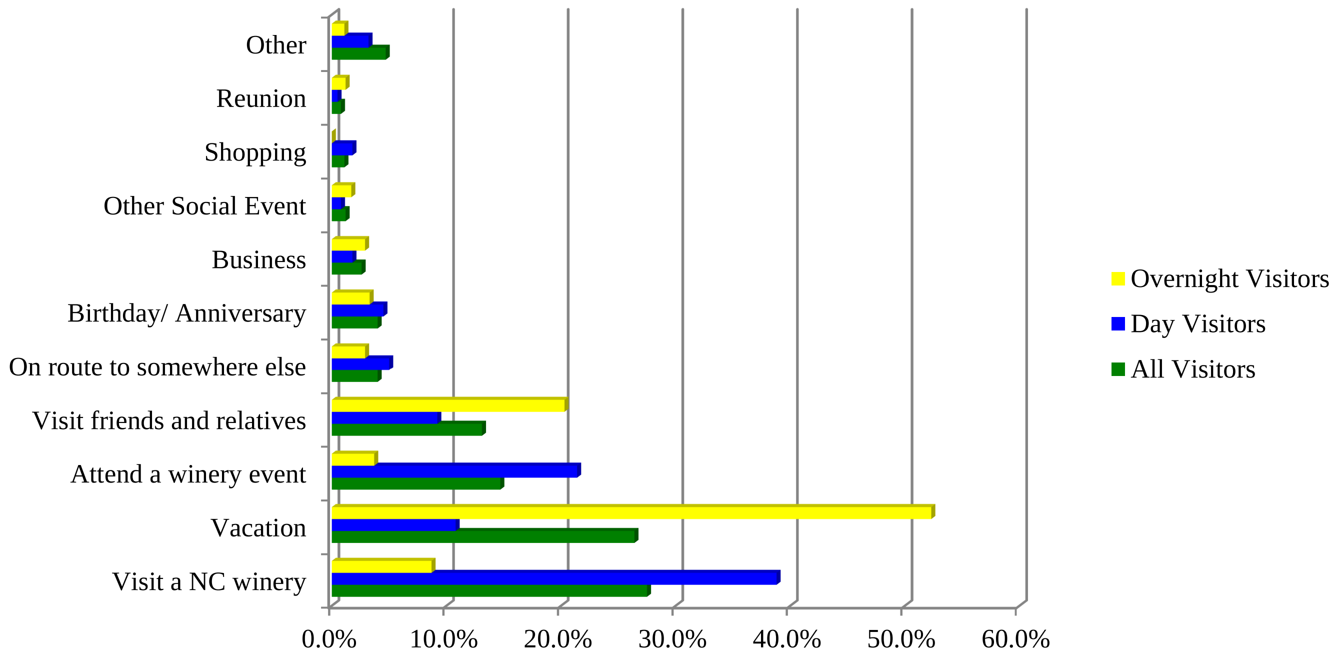
The average travel party size was 4.25 persons of legal drinking age (21years +) and 0.47 persons under the legal drinking age. Travel party size ranged from one to 61 adults. Since the range for party size is quite high, the median (2.0 people) may better represent the average travel party. Comparing Day tourists to Overnight tourists reveals that the mean travel party size of Overnight tourists is smaller (3.63) than that of Day tourists (4.59), yet the median for both subgroups was 2.0 people.

Over two-fifths of the tourist respondents (42.2%) indicated that the primary purpose of their trip was winery-related. There were, however, major differences again (p=.00) when Day tourists are compared to Overnight tourist. A large percentage (60.2%) of Day tourists selected winery-related activities as their primary trip purpose, compared to 12.4% of Overnight tourists. Over half (52.3%) of the Overnight tourists indicated *Vacation* as their primary purpose compared to 10.8% of Day Tourists. These results indicate that additional attractions and tourism resources are necessary to attract tourists who will stay overnight in a winery region (see Table 3 and Figure 7).

Table 3: Primary Purpose

Purpose	All Tourists	Day Tourists	Overnight Tourists
Visit a NC winery	27.5%	38.8%	8.7%
Vacation	26.4%	10.8%	52.3%
Attend a winery sponsored event	14.7%	21.4%	3.7%
Visit friends and relatives	13.1%	9.2%	20.3%
On route to somewhere else	4.0%	5.0%	2.9%
Birthday/anniversary	4.0%	4.5%	3.3%
Business	2.6%	1.8%	2.9%
Other social event	1.2%	0.8%	1.7%
Shopping	1.1%	1.8%	0.0%
Reunion	0.8%	0.5%	1.2%
Other purpose	4.7%	3.2%	1.1%

Figure 7: Primary Purpsoe

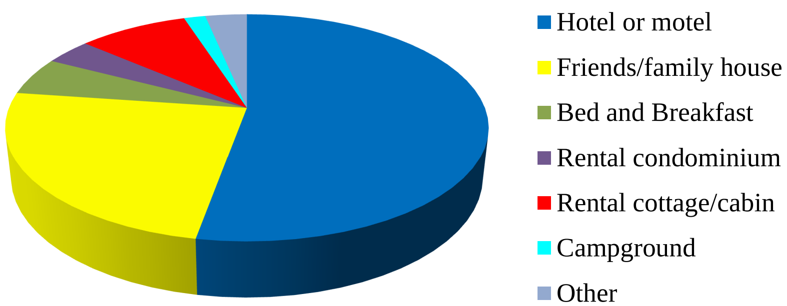


Tourists to the area were also asked what type of accommodations they were using while there. Almost half (49.8%) indicated that they were not staying at a commercial accommodation, but were staying with friends or family, which was the most used accommodation after hotels or motels (see Table 4 and Figure 8).

Table 4: Accommodations Used

Accommodations	All Tourists	Overnight Tourists
Hotel or motel	26.1%	52.9%
Friends/family house	13.6%	24.4%
Bed and Breakfast	2.3%	5.4%
Rental condominium	1.9%	3.7%
Rental cottage/cabin	4.2%	8.7%
Campground	1.1%	1.7%
None	49.8%	0.0%
Other	0.9%	3.3%

Figure 8: Accommodations Used by Overnight Visitors



All respondents (locals and tourists) were asked to indicate level of awareness of a variety of information sources about North Carolina wines and wineries, and to rate the value of those sources in making a decision to visit a North Carolina winery. Overall most respondents were aware of each of the information sources (percentages of persons not aware ranged from 8.4 to 17.3 across the various information sources). However, the four sources that were linked with the lowest level of awareness were those related directly to the state (VisitNCWine.com website, NC Winery Guidebook, NC Official Travel Guide, NC Welcome Center).

The most valued information sources for making a decision to visit a North Carolina winery were *recommendation by people I know personally*, *Internet*, *VisitNCwine.com website*, and *information provided by the winery, e.g., brochures, website*. These results indicate that winery visitors are heavily relying on "word of mouth" recommendations and the Internet. It is important to note that more than half of the respondents rated some of the traditional marketing outlets (*recommendation from retail stores/supermarkets*, *newspaper/magazine advertisement*, *billboard advertisement*) as having little or no value (see Table 5).

Table 5: Value of Information Sources

Source	Mean of those that were aware	% of respondents that were above neutral	% of respondents not aware of the source
Recommendation by people I know personally	4.31	85.1%	8.4%
Internet	4.00	75.5%	8.6%
VisitNCwine.com website	3.94	73.6%	16.0%
Information provided by the winery, e.g., brochures, website	3.94	73.3%	9.2%
Previous travel	3.82	69.9%	10.0%
NC Winery Guidebook	3.71	67.5%	16.8%
NC Official Travel Guide	3.50	60.1%	17.3%
Chef or restaurant recommendations	3.48	58.2%	13.5%
Local region visitors guide	3.40	55.8%	13.5%
Newspaper/Magazine story	3.36	55.1%	13.0%
Experts' formal ratings of the wines produced	3.35	52.8%	15.3%
NC Welcome Center	3.16	48.2%	16.6%
Recommendation from retail stores/supermarkets	3.15	46.5%	14.7%
Newspaper/Magazine advertisement	3.11	45.9%	13.1%
Billboard advertisement	3.10	44.6%	11.5%
Television	3.04	42.6%	14.4%
Radio	2.87	36.9%	15.7%

Sources rated on the following 5 point scale (*1= no value; 2= little value; 3= neutral; 4= some value; 5= very valuable, NA= not aware of the source*).

4.4 Wine Tourism Profile

On average respondents reported visiting 5.23 wineries over the past year (2011-2012). As previously noted, a large majority of respondents (70.9%) had been to a North Carolina winery in the past, averaging 4.15 visits to NC wineries over the past year. The NC Piedmont and Mountain regions were ranked by respondents as the top two winery locations visited in the past. Outside of North Carolina, the top three states visited for wine were California, Virginia, and New York.

Table 6: Wine Regions Visited

Region		Region			
NC Piedmont	47.5%	Oregon	3.7%	Other Europe	1.6%
NC Mountain	44.4%	Spain	2.8%	Florida	1.6%
California	27.4%	Other Northeastern US	2.8%	South Carolina	1.4%
Virginia	22.4%	Georgia	2.2%	Argentina	1.3%
NC Sandhill/ Coast	21.6%	Tennessee	2.2%	Texas	1.3%
New York	10.0%	Other Central US	2.0%	Washington	1.3%
Italy	8.7%	Pennsylvania	1.9%	Other Western US	0.6%
France	6.1%	Other International	1.7%	Other Southern US	0.6%
Other	4.5%	Ohio	1.7%		

4.4.1 Regional Features

Winery visitors were asked to rate the importance of 10 different features when deciding which NC wine region to visit using a 5-point scale (*1= no importance; 2= not important; 3= neutral; 4= important; 5= very important).* On average, the full sample of winery visitors indicated that *The wine region is close to my home, There are a large number of wineries to visit in the immediate area,* and *Fine dining and gourmet restaurants* were important to their selection of the area to visit. Comparing Day to Overnight tourists, the only difference was closeness to home. Closeness to home was not was not considered important to most of the overnight tourists, but *moderately priced accommodations* were considered important by almost half of the overnight tourists (see Table 7).

Statistically significant (p=.05) results from T-tests show that Day tourists differ from Overnight tourist in their ratings of three regional features (*The wine region is close to my home, There are a large number of wineries to visit in the immediate area, Wineries in the region have good signage*). All three of these features were considered more important by Day tourists than Overnight tourists; which indicates that proximity and wayfinding are more important to Day tourists.

4.4.2 Winery Features

Winery visitors were asked to rate the importance of eight different features to the decision about which winery to visit using a 5-point scale *(1= no importance; 2= not important; 3= neutral; 4= important; 5= very important)*. Six of the eight features emerged as important to over 50% of the respondents (see Table 8), while the importance rating levels remained consistent across both Day and Overnight tourist respondents. In particular, *Good customer service* and *Winery staff are knowledgeable about wine* were found to be the most important features, identified as important by 86% of all winery visitors. Also, the item, *History/story* linked to the winery was deemed important by 77.1% of Overnight tourists.

Statistically significant (p=.05) results from T-tests indicate that Day tourists differ from Overnight tourists on their ratings of four features (*Good customer service, Winery staff are knowledgeable about wine, Variety of wines, Car parking, Special pricing or events for wine club*). As with regional features Day tourists considered them more important than did Overnight tourists.

4.4.3 Winery Experience

Winery visitors were asked to rate a number of winery visit benefits, using a 5-point importance scale (*1= no importance; 2= not important; 3= neutral; 4= important; 5= very important*). Of the 19 benefits provided, 14 were considered to be important by over half of the winey visitors (see Table 9). Top-rated benefits indicated to be important by 79% or more of the Winery visitors were: *To taste NC wine; To have a day out; To rest and relax; To socialize with friends and family;* and *To enjoy the beauty of rural NC vineyards*.

Statistically significant (p=.05) results from T-tests show that Day Tourists differ from Overnight tourist in their ratings of nine winery visit benefits: *To taste NC wine, To have a day out, To rest and relax, To socialize with friends and family, To buy NC wine, To eat and drink at the winery, To go on a winery tour, To attend a NC wine-related festival or event*). Consistent with previous analyses, Day tourists considered these benefits to be more important than did Overnight tourists.

Table 7: Importance of Regional Features

Regional Feature	All Respondents		All Tourists		Day Tourists		Overnight Tourists	
	Mean	% Important or Very Important	Mean	% Important or Very Important	Mean	% Important or Very Important	Mean	% Important or Very Important
The wine region is close to my home*	3.66	60.0%	3.54	55.4%	3.84	64.9%	3.04	39.3%
There are a large number of wineries to visit in the immediate area*	3.50	56.0%	3.48	55.5%	3.64	60.0%	3.29	51.1%
Fine dining and gourmet restaurants	3.34	50.0%	3.38	50.8%	3.41	49.7%	3.38	53.3%
Wineries in the region have good signage*	3.22	45.4%	3.23	46.1%	3.31	47.4%	3.10	42.8%
Moderately priced accommodations	3.14	43.7%	3.15	43.6%	3.12	41.5%	3.21	47.1%
A wide range of regional attractions	3.07	39.6%	3.07	39.0%	3.01	35.5%	3.17	43.7%
Specialty shops or markets selling local farm products	2.95	35.8%	2.92	35.2%	2.97	37.1%	2.90	33.7%
Local arts and crafts for sale	2.90	34.6%	2.89	33.9%	2.93	34.1%	2.83	33.0%
Vacation packages are offered to the region	2.68	27.2%	2.70	26.9%	2.67	24.6%	2.74	30.6%
A wide range of activities for children	2.11	15.5%	2.08	13.8%	2.05	13.4%	2.10	14.2%

* Statistically significant difference in means between day and overnight tourists at the p=.05 level

Table 8: Importance of Winery Features

Winery Feature	All Respondents		All Tourists		Day Tourists		Overnight Tourists	
	Mean	% Important or Very Important	Mean	% Important or Very Important	Mean	% Important or Very Important	Mean	% Important or Very Important
Good customer service*	4.39	86.9%	4.37	86.0%	4.45	88.0%	4.22	83.0%
Winery staff are knowledgeable about wine*	4.36	86.0%	4.37	86.8%	4.45	89.7%	4.27	82.5%
Variety of wines*	4.10	81.9%	4.09	81.8%	4.20	85.9%	3.95	72.1%
Winery with a history/story	3.74	66.9%	3.73	67.6%	3.78	68.4%	3.69	77.1%
Appealing website	3.62	62.7%	3.62	63.6%	3.69	65.6%	3.52	60.2%
Car parking (ample spaces/close to entrance/well paved or sealed)*	3.62	58.1%	3.62	59.1%	3.69	59.8%	3.49	56.9%
Special pricing or events for wine club*	3.38	47.9%	3.36	46.8%	3.50	51.0%	3.10	39.6%
Food pairings or cooking classes offered	3.27	47.0%	3.24	46.7%	3.29	46.9%	3.18	46.8%

* Statistically significant difference in means between day and overnight tourists at the p=.05 level

Table 9: Winery Visit Benefits

Activity/ Benefit	All Respondents		All Tourists		Day Tourists		Overnight Tourists	
	Mean	% Important or Very Important	Mean	% Important or Very Important	Mean	% Important or Very Important	Mean	% Important or Very Important
To taste NC wine*	4.30	82.2%	4.27	81.3	4.36	83.9	4.14	77.4
To have a day out*	4.27	83.3%	4.26	83.0	4.36	85.7	4.13	80.0
To rest and relax*	4.24	82.6%	4.23	82.0	4.33	85.1	4.16	80.0
To socialize with friends and family*	4.18	81.3%	4.14	80.6	4.22	82.3	4.04	79.2
To enjoy the beauty of rural NC vineyards	4.12	79.2%	4.10	78.7	4.18	81.2	4.06	77.0
To buy NC wine*	3.97	71.5%	3.95	70.9	4.06	74.4	3.81	66.5
To eat and drink at the winery*	3.90	71.1%	3.91	71.1	4.03	73.2	3.77	69.5
To be entertained	3.72	63.1%	3.69	61.4	3.76	64.5	3.63	58.8
To engage in an activity to fill a free weekend or holiday period	3.67	62.7%	3.67	62.4	3.72	63.9	3.61	61.3
To learn about wine and wine making	3.63	58.4%	3.66	59.8	3.69	59.8	3.63	60.5
To have a different NC experience	3.59	59.4%	3.61	59.4	3.67	60.6	3.54	58.3
To go on a winery tour*	3.53	54.6%	3.52	54.5	3.62	56.5	3.43	54.4
To attend a NC wine-related festival or event*	3.49	52.5%	3.41	49.2	3.60	55.8	3.17	40.2
To visit a historical or cultural attraction in the area	3.43	50.1%	3.42	49.6	3.43	49.4	3.47	52.5
To experience NC agriculture, farms, or local foods	3.38	49.5%	3.35	48.5	3.41	51.2	3.27	45.0
To be able to talk to a winemaker	3.32	46.2%	3.31	46.4	3.38	47.2	3.25	46.6
To visit the wine trail	3.25	43.1%	3.21	41.1	3.26	42.1	3.17	39.8
To participate in outdoor recreation activities	3.19	42.9%	3.17	41.7	3.19	41.6	3.14	42.2
To buy NC wine related gifts/ souvenirs	3.00	36.5%	2.99	35.4	3.08	39.0	2.89	31.3

* Statistically significant difference in means between day and overnight tourists at the p=.05 level

Table 10: Future Travel and Purchases

Intention	All Respondents		All Tourists		Day Tourists		Overnight Tourists	
	Mean	% Likely or Very Likely	Mean	% Likely or Very Likely	Mean	% Likely or Very Likely	Mean	% Likely or Very Likely
How likely are you to visit this winery/vineyard in the future?*	4.36	84.6%	4.28	82.6%	4.36	85.2%	4.16	78.7%
How likely are you to visit any winery in NC in the future?*	4.38	84.5%	4.32	82.1%	4.45	87.0%	4.13	73.8%
How likely are you to purchase NC wines in the future?*	4.42	85.6%	4.36	83.4%	4.46	88.0%	4.21	76.4%
How likely are you to attend a NC wine festival in the future?*	3.97	69.8%	3.88	66.5%	4.05	72.5%	3.63	58.4%
How likely are you to recommend this winery/vineyard to others?*	4.43	88.5%	4.38	87.3%	4.46	89.4%	4.26	84.4%
How likely are you to share this winery experience with others via a social media and which ones?*	3.48	56.0%	3.42	54.3%	3.52	58.4%	3.28	47.7%

* Statistically significant difference in means between day and overnight tourists at the p=.01 level

Table 11: Wine-related knowledge

	None	Basic	Intermediate	Advanced	Connoisseur
Knowledge of major grape varieties and types of red/white/rose/sparkling wines	20.3%	36.0%	30.3%	10.6%	2.8%
Knowledge of wine region geography, viticulture, and wine types produced in major world regions	26.3%	37.8%	23.9%	10.1%	1.9%
Wine grapes grown and types of wines produced in NC	25.0%	38.2%	23.9%	10.2%	2.7%
North Carolina wine production geography and history	28.4%	37.5%	22.1%	9.3%	2.7%
North Carolina wineries and wine trails/wine tourism	28.0%	35.2%	24.4%	9.5%	2.9%

4.5 Future Travel and Purchases

Winery visitors were asked six questions about their intentions regarding future travel to wineries and NC wine purchases. Over four-fifths of the all Winery visitor surveyed indicated that they were likely to revisit the winery they were at and over four-fifths of respondents indicated they would visit a NC winery in the future (see Table 10). These *intentions to revisit/visit* rating levels were reflected also in a subsample analysis of Day tourists. Also, over 88% of respondents indicated that they were likely to recommend the winery to others. Based on these findings, there are indications that repeat visitation is largely attributed to local and day tourists.

With regard to intentions for future travel and NC wine purchases, Day tourists differed from Overnight tourists (p=.01 level) on all six items, by reporting higher levels of likelihood to do all the listed activities.

4.6 Wine-related Knowledge and Behavior

Winery visitors were asked five questions about their level of wine knowledge (see Table 11). Over 56% of respondents indicated their level of knowledge to range from *basic* to *no wine knowledge in any of the areas*. Respondents were also asked about the value of wine they usually purchase, to which 67.2% reported *Mid-range ($10-$20)* (see Table 14). In terms of how respondent level of wine knowledge relates to a visitor's purchase habits, results indicate that individuals reporting higher levels of wine knowledge claimed they would pay more for a bottle of wine (see Tables 12 -16).

Table 12: Value of Bottle of Wine Purchased based on Wine Knowledge - Grape Varieties & Types

	Wine Knowledge - Grape Varieties & Types		
Value of Bottle of Wine Purchased	**None - Basic**	**Intermediate**	**Advanced - Connoisseur**
High end or rare wines (more than $40)	0.3%	0.5%	3.2%
Upscale wines ($21-40)	4.5%	7.0%	19.4%
Mid-range wines ($10-20)	66.2%	73.0%	60.2%
Value wines ($10 or less)	23.0%	19.5%	17.2%
I never buy wine in bottles	6.1%	0.0%	0.0%

Table 13: Value of Bottle of Wine Purchased based on Wine Knowledge - Wine Region

	Wine Knowledge - Wine Region		
Value of Bottle of Wine Purchased	**None - Basic**	**Intermediate**	**Advanced - Connoisseur**
High end or rare wines (more than $40)	0.2%	1.2%	2.4%
Upscale wines ($21-40)	4.3%	9.9%	18.1%
Mid-range wines ($10-20)	67.7%	67.9%	63.9%
Value wines ($10 or less)	22.3%	21.0%	15.7%
I never buy wine in bottles	5.4%	0%	0%

Table 14: Value of Bottle of Wine Purchased based on Wine Knowledge – NC Grape Varieties & Types

	Wine Knowledge – NC Grape Varieties & Types		
Value of Bottle of Wine Purchased	**None - Basic**	**Intermediate**	**Advanced - Connoisseur**
High end or rare wines (more than $40)	0.5%	1.2%	1.1%
Upscale wines ($21-40)	5.3%	9.1%	13.5%
Mid-range wines ($10-20)	66.7%	69.7%	66.3%
Value wines ($10 or less)	22.3%	19.4%	19.1%
I never buy wine in bottles	5.3%	0%	0%

Table 15: Value of Bottle of Wine Purchased based on Wine Knowledge - NC Wine Production Geography and History

Value of Bottle of Wine Purchased	Wine Knowledge - NC Wine Production Geography and History		
	None - Basic	Intermediate	Advanced - Connoisseur
High end or rare wines (more than $40)	0.2%	2.0%	1.2%
Upscale wines ($21-40)	5.5%	7.3%	16.9%
Mid-range wines ($10-20)	67.0%	68.2%	68.7%
Value wines ($10 or less)	22.2%	21.9%	13.3%
I never buy wine in bottles	5.1%	0.7%	0%

Table 16: Value of Bottle of Wine Purchased based on Wine Knowledge - NC Wineries and Wine Trails

Value of Bottle of Wine Purchased	Wine Knowledge - NC Wineries and Wine Trails		
	None - Basic	Intermediate	Advanced - Connoisseur
High end or rare wines (more than $40)	0%	1.8%	2.4%
Upscale wines ($21-40)	5.5%	8.4%	14.3%
Mid-range wines ($10-20)	66.9%	67.1%	69.0%
Value wines ($10 or less)	22.3%	22.8%	13.1%
I never buy wine in bottles	5.3%	0%	1.2%

When comparing preference for sweet versus dry wines, 46.6% of respondents preferred sweet, followed by dry (41.2%). In terms of type of wine, red wines (56.0%) were found to be most favored, followed by white (55.1%);Muscadine was favored by 20.3% closely followed by rose (19.0%) (see Table 17).

Table 17: Wine Preference

	% of respondents
Dry or Sweet	
Sweet	46.6%
Dry	41.2%
No preference	12.3%
Don't know	3.1%
Type	
Red wines	56.0%
White wines	55.1%
Muscadine wine	20.3%
Rose/Blush wines	19.0%
Sparkling wines	16.6%
Other fruit flavored wines or mead	11.8%

Most of the respondents indicated that they drink wine at least once per week (69.5%) and buy a bottle of wine at least once or twice a month (74.3%) (see Table 18). A large majority (79.2%) of the respondents indicated that when they buy wine they usually purchase between one and four bottles. The majority (83.5%) of respondents indicated their main purpose for the purchase to be personal consumption, followed by buying wine as a gift or for holiday or special celebrations (48.6%). The majority of respondents (85.5%) expect to pay $10 to $19.99 for a bottle of wine.

Type 18: Wine-related Behavior

	% of respondents
How often do you drink wine?	
Daily	18.5%
A couple of times per week	34.1%
Once per week	16.9%
1 to 2 times per month	16.3%
less than once per month	10.7%
Never	3.6%
How often do you buy bottles of wine?	
Daily	2.5%
A couple of times per week	12.5%
Once per week	21.8%
1 to 2 times per month	37.5%
less than once per month	21.4%
Never	4.1%
Quantities of wine purchased	
A case of wine or more at a time	8.6%
More than 4 bottles but less than a case	8.1%
Between 2 to 4 bottles at a time	44.6%
1 bottle at a time	34.6%
I never buy wine in bottles	4.0%
Type of bottles of wine purchased	
High end or rare wines (more than $40)	0.7%
Upscale wines ($21-40)	7.1%
Mid-range wines ($10-20)	67.2%
Value wines ($10 or less)	21.3%
I never buy wine in bottles	3.7%
Purpose of wine purchase	
For yourself for immediate consumption	83.5%
As gift for other people	48.6%
For holidays or celebrations	48.6%
As a collector for your wine cellar	11.5%
Other	3.9%
What do you expect to pay for a bottle of North Carolina wine?	
Less than $10	7.2%
From $10 to 14.99	43.6%
From $15 to 19.99	41.9%
From $20 to 24.99	6.1%
From $25 to 29.99	0.8%
Over $30.00	0.4%

4.6.1 Perception of North Carolina Wine

Winery visitors were asked to rate their perceptions of NC wine using 5-point Likert-type scales (see Table 19). Most respondents (72.6%) indicated that they enjoyed the taste of NC wine and 61.7% consider NC wines to be of high quality. The majority (70.2%) also consider North Carolina wines to make good gifts to give. Only 36.8% indicated that they were loyal to a particular NC winery or wine.

Table 19: Perception of North Carolina Wine

	Mean	% of Respondents that Agree or Strongly Agree
I enjoy the taste of North Carolina wines I have tried	4.02	72.6%
I am loyal to one or more North Carolina wineries or wines	2.96	36.8%
I believe North Carolina wines are priced to give me value for my money	3.65	57.7%
I believe the North Carolina wines I have tried are mostly of high quality	3.74	61.7%
I believe that North Carolina wines make good gifts to give to others	3.94	70.2%

4.6.2 Perception of Wine

Winery visitors were asked to rate their personal attitudes toward wine using a 16-item 5-point Likert-type scale (see Table 20). The majority (70.8%) of respondents said they believe wine is an affordable product for them; 68.8% believe in the positive health benefits of wine; 66.9% believe drinking wine helps them to relax and reduce stress; 57.9% buy and give wine as gifts to family, friends, or associates; and 54.1% prefer wine over other alcoholic beverages such as beer or spirits. Conversely, respondents generally did not agree with statements related to wine improving their social image, career status, or social goals.

Table 20: Perception of Wine

	Mean	% of Respondents that Agree or Strongly Agree
I believe wine is an affordable product for me	3.90	70.8%
I believe there are positive health benefits in drinking wine	3.83	68.8%
Drinking wine helps me to relax and reduces my stress	3.72	66.9%
I often buy and give wine as gifts to family, friends, or associates	3.53	57.9%
I prefer wine over other alcoholic beverages, e.g., beer, spirits	3.51	54.1%
Drinking wine is an activity that is personally important to me	3.34	46.9%
Drinking wine is an activity that is important among my peers	3.28	44.2%
I view drinking wine as primarily an activity for special occasions/holidays	2.90	34.5%
I view wine as a luxury product I buy to treat myself well	2.83	35.6%
I view drinking wine as a part of my everyday activities	2.74	31.5%
Drinking wine is mostly about having an experience, not the product itself	2.52	22.6%
Building a quality personal wine collection is important to me	2.13	14.7%
Drinking wine is important to my self-image	2.09	12.9%
I belong to winery clubs or wine-drinking social groups	2.07	20.9%
Drinking wine will help me achieve my social goals	1.93	9.9%
Drinking wine will help me in my career advancement	1.79	7.7%

We analyzed the relationship between selected respondent attributes (the level of wine knowledge and respondent beliefs about wine and wine drinking benefits) and their response tendencies on certain outcomes (likeliness of engaging in certain future consumer behaviors and beliefs about NC wine.) Of interest are results showing that higher levels of self-reported knowledge of NC grapes and types of wines, as well as knowledge about NC wine production, geography, and history have moderate positive correlations with visitors' likelihood of visiting a NC winery in the future, with visitors' reports of loyalty to one or more NC winery or wine, and with visitor perceptions that NC wines are priced to give consumers value.

Interestingly, visitors' self-reported wine knowledge levels or beliefs about wine as a product or about wine drinking and its benefits had no or only negligible correlations with the individual types of information sources ranging from state-sponsored websites to word of mouth from individuals, experts, or stores. These consumer attributes did not appear to be a factor in selecting media or information sources when preparing to visit a NC winery. However, with respect to the two top media sources reported, word of mouth and the internet, moderate positive correlations were seen among ratings about word of mouth and ratings about opinions of experts, restaurant chefs, and retail personnel, suggesting a broader definition of word of mouth than just friends and family. The survey item value of the internet as a source of information, showed a strong positive correlation with value of the NC VisitNCWine.com website, indicating that the state's efforts are in the right direction regarding the use of technology.

Results show also that, among the various beliefs about wine as a product or about wine drinking and its benefits, belief in the personal affordability of wine to the respondent shows the highest correlation to the top winery visit objective of "to taste NC wine." In like manner, affordability perceptions correlate more highly with the visit objective "to buy NC wine" than do any other beliefs about wine and its benefits. Beliefs that wine is personally affordable and drinking wine reduces stress/is relaxing also show moderate positive correlations with future intentions to visit NC wineries and to buy NC wine. Strong positive correlations exist between perceptions of the taste of NC wine, perceived price to value, and perceptions of wine quality, suggesting that wine quality is a sustainability factor in the continued growth of the industry in North Carolina.

Value of r Strength of relationship
-1.0 to -0.5 or 1.0 to 0.5 Strong
-0.5 to -0.3 or 0.3 to 0.5 Moderate
-0.3 to -0.1 or 0.1 to 0.3 Weak
-0.1 to 0.1 None or very weak

4.7 Predictors of Decisions and Future Intentions

4.7.1 Overnight Stay
As previously indicated, 38.7% of the tourists in the study indicated that they were staying overnight in the area. To better understand what influenced their decision to stay overnight a decision tree analysis was utilized (see Figure 9). ***Results show that the best indicator of staying overnight is the purpose of the trip.*** Of tourists whose primary trip purpose was a vacation, 75.4% stayed overnight. Only 11.4% of tourists whose primary trip purpose was related specifically to wine/winery or shopping stayed overnight. Looking specifically at tourists whose main purpose was to visit the winery, men were more likely to stay overnight (20.5%) than women (7.8%).

4.7.2 How likely are you to visit this winery/vineyard in the future?
An overwhelmingly majority (84.6%) of winery visitors indicated that they were likely to visit the winery they were interviewed at in the future. To identify what influenced their likelihood to revisit the winery a decision tree analysis was used (see Figure 10). ***The best predictor of future visits to the winery was the***

importance of customer service to the respondent. Almost all (91.2%) of the visitors who indicated good customer service was very important indicated that they would likely visit the winery again. As the importance of customer service decreased so too did respondent likelihood of visiting the winery again. This outcome demonstrates the critical function of cellar door service and customer experience [as opposed to wine products themselves] in the revisit decision.

Decision tree analysis also permits further exploration of secondary and tertiary factors in motivating the revisit decision. Looking specifically at visitors who indicated good customer service was of primary importance to their decision to visit, for most of them (94.7%) the secondary factor determining if they would visit the winery again was the importance of the winery being close to home. Furthermore, analysis shows that the importance placed on having special pricing or an event for wine club members is a third critical factor in the decision to revisit. Almost all (97.6%) of the visitors who felt customer service is important, closeness to home is important, and special pricing or an event for wine club members is important to their decision making process plan to visit the winery again.

For visitors who viewed customer service as neutral to somewhat important, the secondary factor prompting likelihood of revisiting that winery was shown to be the value they placed on the winery having a story or history associated with it. Eighty-five percent of visitors who indicated customer service neutral to somewhat important and the winery having a story or history as important to their decision to visit were likely to visit the winery in the future.

4.7.3 How likely are you to visit any winery in NC in the future?

Visitors were asked the likelihood of their visiting a NC winery in the future. Slightly over four-fifths (84.5%) of the visitors indicated likelihood of visiting a NC winery in the future. To identify what influenced their likelihood to visit the winery in the future a decision tree analysis was used (see Figure 11). ***The best predictor of future visits to a NC winery was again the importance of customer service.*** Almost all (92.2%) of the visitors that indicated customer service was very important in their decision to visit in the first place, indicated that they would likely visit a NC winery again. As the importance in customer service decreased so too did respondent likelihood of visiting a NC winery again.

While customer service was the primary factor driving intentions to revisit a NC winery, results also show that a secondary factor was repeat/first-timer visitor status. Repeat visitor respondent were more likely to visit a NC winery in the future when compared to first-time visitors in the current study. There are indications from these results that there is a developing loyal consumer base for NC wines.

4.7.4 How likely are you to purchase NC wines in the future?

The best indicator of visitors' intentions to buy NC wine in the future is the importance they place on the variety of wines at a winery (see Figure 12). Most (93.0%) of the respondents who indicated wine variety as very important state they plan to buy NC wine in the future. Repeat versus first-timer status again operates as a secondary factor in this case. Almost all (96.7%) of repeat visitors who indicated wine variety as very important plan to by NC wine compared to 83.3% of first time visitors.

As the level of importance of the variety of wine goes down so does the indication that the visitor plans to buy NC wine in the future.

4.7.5 How likely are you to attend a NC wine festival in the future?

To identify what influenced the likelihood of visitors' intention to attend a NC wine festival in the future a decision tree analysis was used (see Figure 13). ***The best predictor of future attendance at a NC wine festival was the visitor's state of origin.*** Over three-fourths (79.1%) of the visitors from North Carolina and Delaware indicated that they were likely to attend a NC wine related festival in the future. Visitors from these two states can be further split by how they value special prices and events for wine club members. Eighty-eight percent of North Carolina and Delaware visitors who valued special prices and events for wine club members as very important are likely to attend a NC wine festival. As the importance in special prices and events for wine club members decreased so too did likelihood of attending a NC wine festival in the future. Based on these results there is an indication that the main target market for NC wine festivals and events are residents in North Carolina who are motivated by winery-based events oriented towards consumers loyal to specific NC wineries.

4.7.6 How likely are you to recommend this winery/vineyard to others?

To identify what influenced visitor's likelihood to recommend this winery/vineyard to others a decision tree analysis was used (see Figure 14). ***The best predictor was good customer service.*** Almost all (93.1%) of the visitors indicated good customer service was very important in their decision to recommend this winery/vineyard to others. valued secondary factor was the respondent's rating of the importance of special prices and events for wine club members. Ninety-six percent of the visitors who indicated good customer service was very important and special prices and events for wine club members was very important were likely to recommend this winery/vineyard to others.

4.7.8 How likely are you to share this winery experience with others via a social media?

The best indicator of a visitor's intention to share this winery experience with others via a social media was the value they place on the appeal of the winery website in their decision making process (see Figure 15). Almost 70% of the visitors who indicated the appeal of the winery website was very important to their decision to visit the winery at which they were interviewed were likely to share this winery experience with others via a social media website. Based on this the appeal and functionality of a winery's website is vital if the winery hopes that visitors will share their experience via social networks.

Figure 9: Overnight Stay Decision Tree

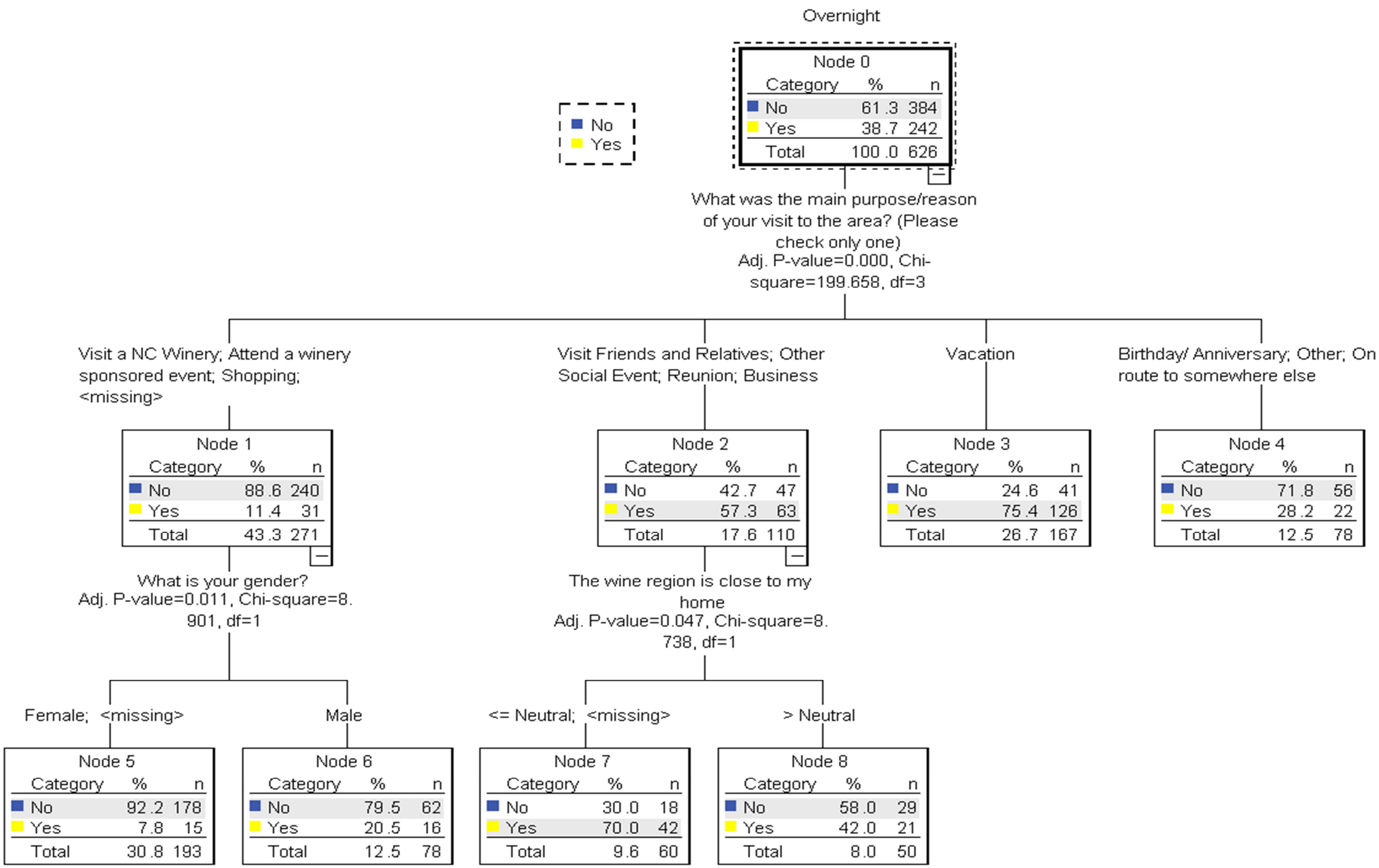


Figure 10: Likelihood to Visit This Winery/Vineyard in the Future Decision Tree

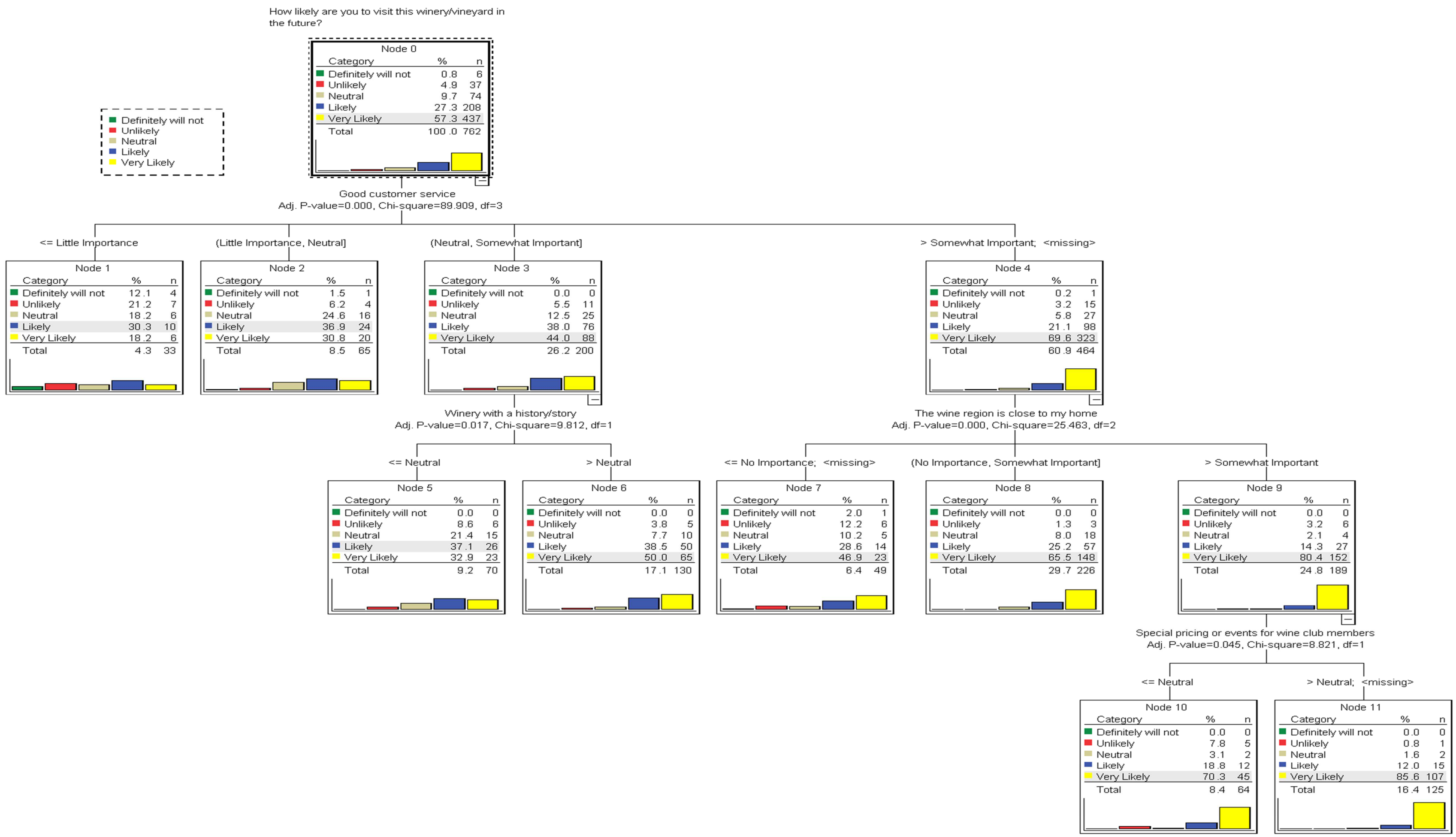


Figure 11: Likelihood to Visit Any Winery in NC in the Future Decision Tree

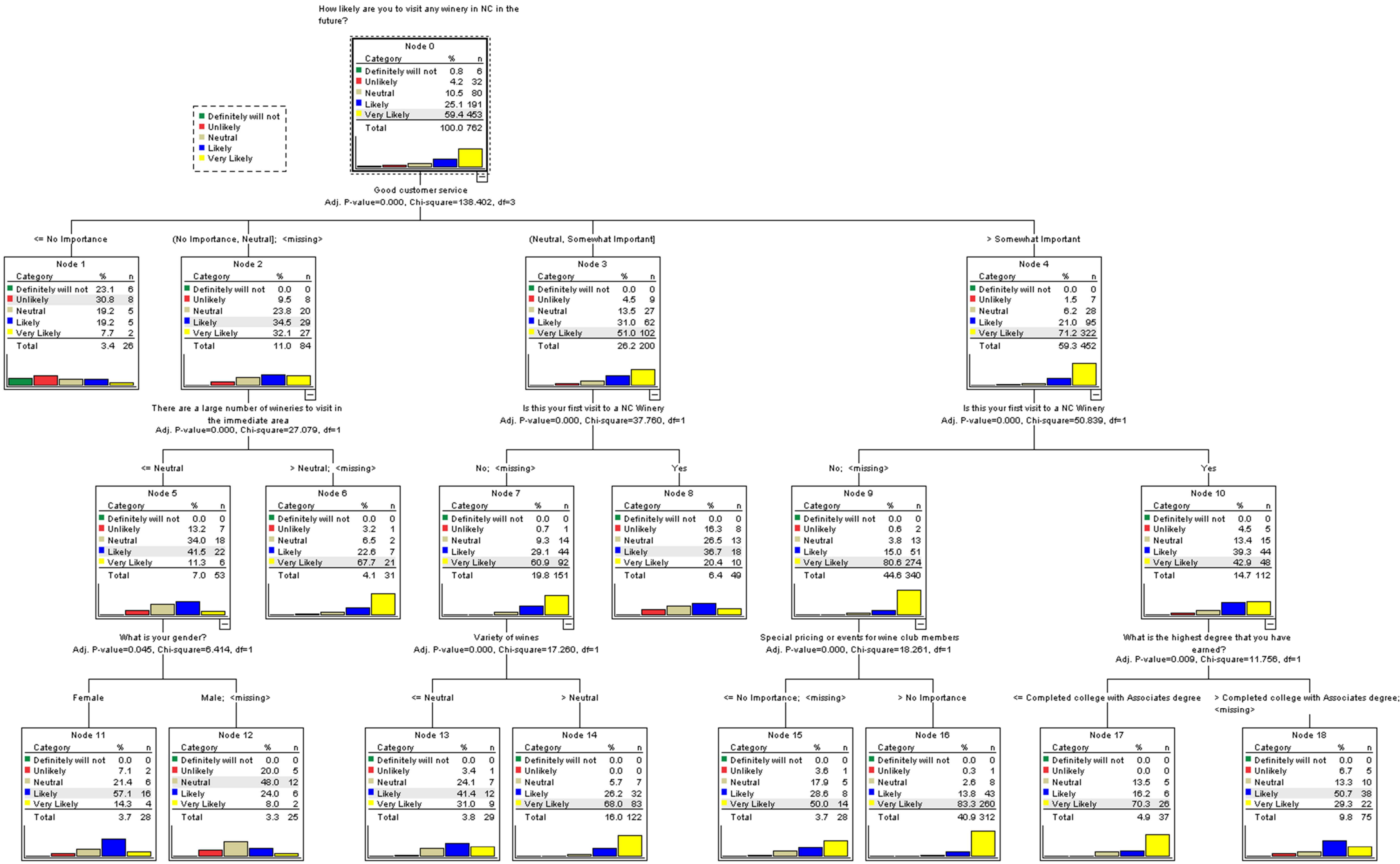


Figure 12: Likelihood to Purchase NC Wines in the Future Decision Tree

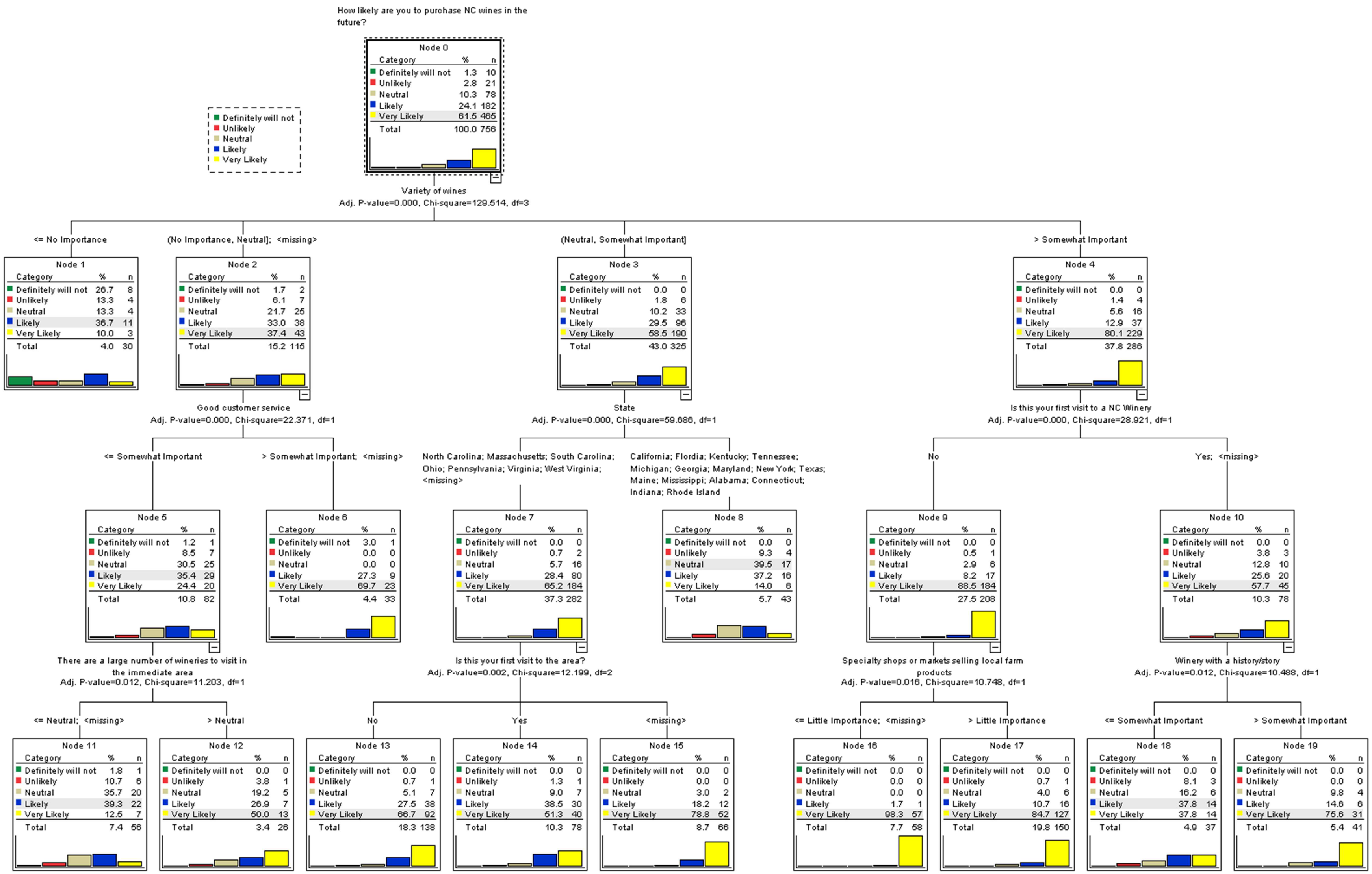


Figure 13: Likelihood to Attend a NC Wine Festival in the Future Decision Tree

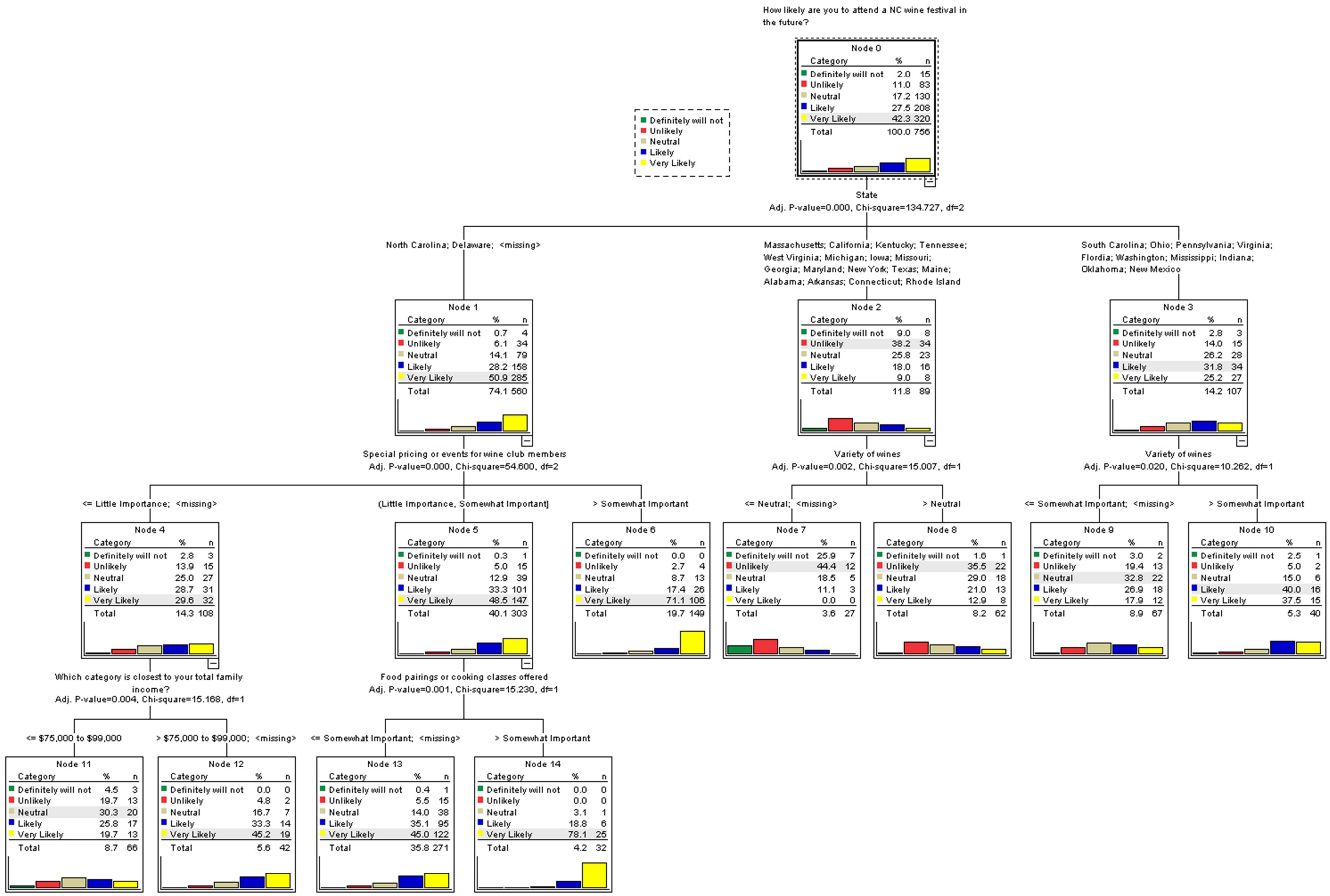


Figure 14: Likelihood to Recommend this Winery/Vineyard to Others Decision Tree

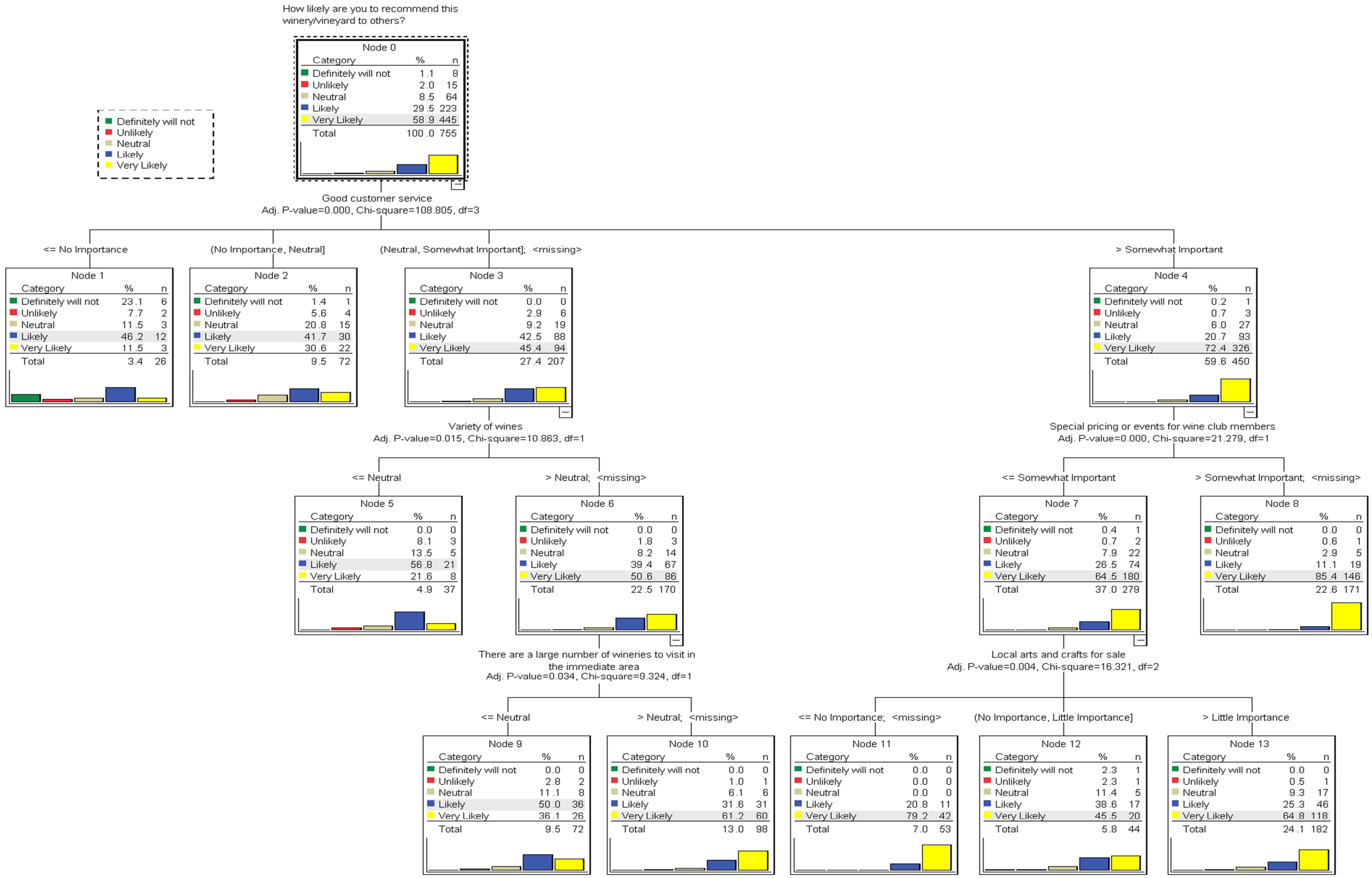
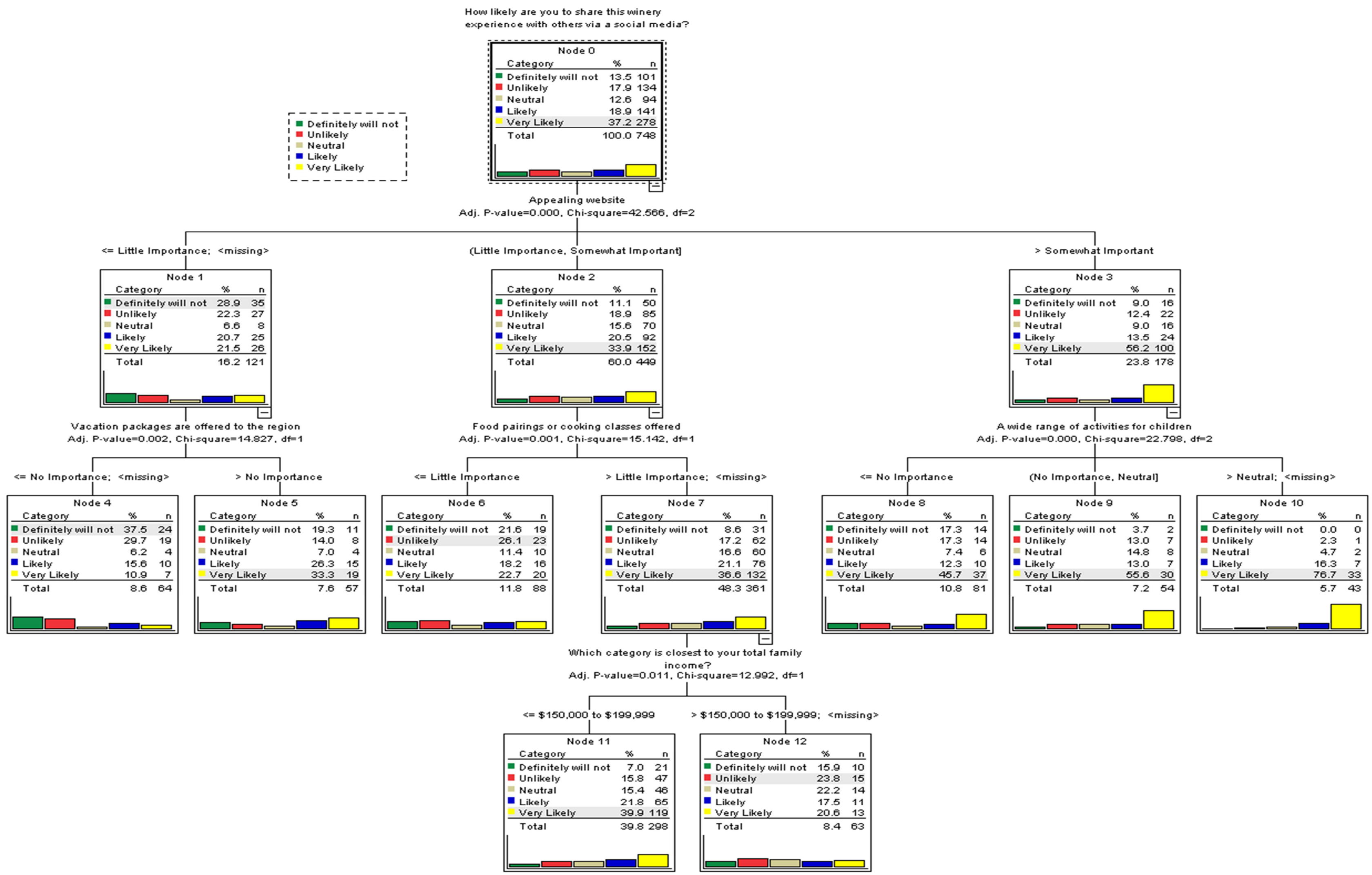


Figure 15: Likelihood toShare this Winery Experience With Others Via a Social Media Decision Tre



5. CONCLUSIONS

Study findings indicate three distinct markets in the context of North Carolina winery visitation: local visitors, day tourists, and overnight tourists. In terms of local and day visitors, there are indications of a developing loyal consumer base for NC wines and for individual NC wineries. Our findings indicate that special events, such as holiday specials (along with holiday themed wines) are likely to attract greater numbers of visitors from within NC and are primarily viewed as benefits of client to winery relationships rather than as attractors for general NC wine tourism. Overnight winery tourists are seeking a vacation experience, looking for additional attractions and reasonably-priced accommodations. One strong finding was that of two distinct consumer reactions to attending wine festivals in NC. Visitors from North Carolina were motivated by the potential to experience personalized relationships with wineries through events while visitors from out of State were motivated mainly by being exposed to a variety of wines.

Customer service drives many consumer behaviors, including revisit intentions and word of mouth recommendations. Based on the results there are indications that wine variety and quality should be considered an “order qualifier factor” (necessary to be a player in the industry) and good customer service is an “order winner factor” (the main competitive advantage) for a winery and for NC wine in general. If visitors have a good customer service experience at a specific winery not only would they be more likely to revisit that location and provide positive word of mouth about the winery, but also to express intentions to visit another NC winery in the future.

Regarding pricing decisions, customers who have a better understanding of wine and what makes a high quality wine are more willing to pay more for the wine they purchase.

Word of mouth and the internet are key information resources for people making decisions about visiting NC wineries. Website appeal is a critical factor in recommending wineries to others using social media channels.

6. RECOMMENDATIONS

The preceding conclusions were drawn directly from our study findings. In turn, these conclusions have a number of implications for North Carolina.

6.1 Customer Service

- High quality customer service should be a focus of the NC Wine industry and individual wineries to create and enhance the competitive advantage that appears to be developing for NC Wine. Without good customer service the NC wine industry could lose a major opportunity to obtain a competitive advantage over other wine-producing states and regions. In view of this critical finding (customer service drives many winery outcomes):
  - Wineries must provide a high quality tasting room experience to their visitors.
    - Tasting room staff personnel need to be professional, courteous, and knowledgeable about wine, specifically about the wine from the winery at which they are working. Offering anecdotal or historical information about the winery or the region to visitors and the having the ability to personalize the “story” of the wine and winery will go a long way towardsenhancing visitor experiences.
  - Wineries should consider designating areas where couples and groups can sit and socialize with each other while enjoying the wine and winery.

  - Wineries should proactively educate their visitors about their wines to improve and increase their knowledge and understanding of wine.In view of the critical finding that customer service drives winery outcomes, a key economic development strategy will be to target funding sources and programs for enhancing cellar door services and tasting room staff training.

6.2 Market Focus

- Study findings indicate three distinct markets: local visitors, day tourists, and overnight tourists. Strategic marketing efforts should be tailored to each of these three markets. For example
  - Individual wineries may want to focus on the local and day visitors while the NCDTFSD and local DMOs might wish to focus more on the overnight market.
- Visitors from North Carolina were motivated by the potential to experience personalized relationships with wineries through events while visitors from out of State were motivated mainly by being exposed to a variety of wines.
  - This suggests that investment in wine-based events should be localized at wineries to develop consumer loyalty.
  - Tourist-based wine experiences may be formulated as permanent wine-tasting centers that are open to tourists as an additional visitor attraction all year round.
- Winery promotional material and websites should include travel times from major cities to attract visitors from locations close to major population centers.

6.3 Cooperative Marketing and Packaging

- Cooperative efforts, such as joint promotions, are recommended to wineries in order to not only cultivate their relationships with each other, but to capitalize on their proximity to each other to attract greater numbers of visitors.
  - Clearly note on individual winery websites, their proximity to others in the vicinity to increase convenience for visitors.
  - Wineries can work together to organize and promote day trips linking those wineries that are close to each other with clear driving directions, travel times, or commercial shuttle tours.
- Local DMOs should advertise clusters of wineries within 15-20 minutes of each other or within the region showing their proximity to each other.
- Intentionally integrate the State's marketing efforts with promotional strategies at the actual wineries, the wineries' website, and linked to other websites to drive visitors to these areas.

6.4 Developing a Loyal Market

- There are indications of a developing loyal consumer base for NC wines. To continue to develop this group of loyal NC wine customers there is a need for specific incentives and rewards for loyalty.
  - A relationship marketing strategy should be developed by the wine industry to enhance the loyalty that these consumers have for NC wine.

    - An incentive program can be offered by individual wineries for referrals and/or for visitors to share their positive experiences at the winery with others.
        - Referrals can be handled thorough a wine club with discounts given for referrals who visit the winery and purchase wine. The "sharing" could be administered through a social media site (i.e. Facebook) where guests can post their thoughts on the winery's page (which will then appear on the guest's friends' pages) and either receive a discount on their next purchase or get entered into a drawing for discounts or products.
- Results show that special prices and events for wine club members do influence loyalty to the winery and general "word of mouth" promotion of the location and its products.
    - Wineries should consider (if they have not already) special prices and events for wine club members. If the winey has this program already in place, the winery should review their club program to identify areas that could be improved.

6.5 Internet

- It is suggested that all wineries develop a Facebook page and designate someone to manage and keep the site up-to-date.
- Website appeal is a critical factor in recommending wineries to others using social media channels, we recommend that the State and wineries evaluate the usefulness and design of winery websites to make sure they follow best practice in website design and functionality.
- Websites should contain a part of the history or story of the winery, so that visitors can begin to get a feel and affinity to the winery.

6.6 Research Recommendations

- In spite of the time-specific and cross-sectional design of this study, it has yielded a more detailed portrait of NC winery tourists. Given the demonstrated potential of such rich market intelligence, it is strongly recommended that data collection be repeated regularly to identify trends and track changes in wine tourists over time.
- It is recommended that future collection of data be spread over all four seasons to account for seasonality of wine tourism.

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Appendix A
Key Talking Points

- Wineries generated visitation from approximately three out of every four counties in North Carolina. With the Piedmont Triad region generating the largest number of wine visitors followed by the Research Triangle area, and the Charlotte area.

- 89% of NC winery visitors would recommend the winery they visited to others.

- 73% of NC winery visitors enjoy the taste of NC Wine

- 87% of NC winery visitors indicated that customer service was an important feature to a winery
    - Customer service has been shown as a key order winner for wineries

- On average respondents reported visiting 5.23 wineries over the past year (2011-2012).

- Top Regional Features for Winery Visitors
    1. The wine region is close to my home
    2. There are a large number of wineries to visit in the immediate area
    3. Fine dining and gourmet restaurants were important to their selection of the area to visit

- Top Winery Features for Winery Visitors
    1. Good customer service
    2. Knowledgeable winery staff
    3. History/story linked to the winery

- Top Winery Activity/ Benefit for Winery Visitors
    1. To taste NC wine
    2. To have a day out
    3. To rest and relax
    4. To socialize with friends and family
    5. To enjoy the beauty of rural NC vineyards

- 86% of NC winery visitors indicated that a staff knowledgeable about wine was an important feature to a winery.

- The best predictor of future visits to a NC winery high quality customer service
    - Wine variety and quality is an “order qualifier” (necessity to do business)
    - Good customer service is an “order winner” (the main competitive advantage) for NC wine.

- Customers who have a better understanding of wine are more willing to pay more for the wine they purchase.

Appendix B – Questionnaire

1. What is the zip code of your primary residence? ________________________

2. Are you a resident of the community in which this winery is located? ☐ Yes ☐ No

If yes, please go to question 9. If no, continue to question 3

3. What is your primary destination on this trip? ____

4. What was the main purpose/reason of your visit to the area? (*Please check only one*)

- ☐ Vacation
- ☐ Business
- ☐ Reunion
- ☐ Visit friends and relatives
- ☐ Visit a NC winery
- ☐ Shopping
- ☐ On route to somewhere else
- ☐ Attend a winery sponsored event
- ☐ Other reason (please specify)

5. Is this your first visit to the area? ☐ Yes ☐ No

6. How many people are in your travel party? _______________ 21+ ___________________ under 21

7. How many days and nights do you plan to stay in this immediate region? _________ days _________ nights

8. What type of lodging are you using on this trip?

- ☐ Hotel or motel
- ☐ Friends/ family house
- ☐ Bed and Breakfast
- ☐ Rental condominium
- ☐ Rental cottage/ cabin
- ☐ Campground
- ☐ Other (*please specify*) __________________________

9. Is this your first visit to a NC winery? ☐ Yes ☐ No

10. Based on how valuable each information source would be to you in making a decision to visit a North Carolina winery, please rate the following sources. Please rate each item (*1= no value; 2= little value; 3= neutral; 4= some value; 5= very valuable, NA= not aware of the source*).

		No value	Little Value		Some Value	Very Valuable	Not Aware
a.	NC Winery Guidebook	1	2	3	4	5	NA
b.	NC Official Travel Guide	1	2	3	4	5	NA
c.	NC Welcome Center	1	2	3	4	5	NA
d.	VisitNCwine.com website	1	2	3	4	5	NA
e.	Television	1	2	3	4	5	NA
f.	Internet	1	2	3	4	5	NA
g.	Radio	1	2	3	4	5	NA
h.	Previous travel	1	2	3	4	5	NA
i.	Billboard advertisement	1	2	3	4	5	NA
j.	Newspaper/Magazine advertisement	1	2	3	4	5	NA
k.	Newspaper/Magazine story	1	2	3	4	5	NA
l.	Local region visitors guide	1	2	3	4	5	NA
m.	Experts' formal ratings of the wines produced	1	2	3	4	5	NA
n.	Chef or restaurant recommendations	1	2	3	4	5	NA
o.	Recommendation from retail stores/supermarkets	1	2	3	4	5	NA
p.	Recommendation by people I know personally	1	2	3	4	5	NA
q.	Information provided by the winery, e.g., brochures, website	1	2	3	4	5	NA

11. How many times have you been to wineries in the last year? ______ to NC wineries_________?

12. Where have you visited a winery in the past? (*Please check all that apply*)

☐ NC Mountain	☐ New York	☐ France
☐ NC Piedmont	☐ Oregon	☐ Italy
☐ NC Sandhill/ Coast	☐ Virginia	☐ Spain
☐ California	☐ Argentina	☐ Other:(*please specify*) ___________________

13. REGION FEATURES: We are interested in the importance of different features when deciding which NC wine region to visit. Please rate each attribute (*1= no importance; 2= not important; 3= neutral; 4= important; 5= very important*).

		No Importance		Neutral		Very Important
a.	The wine region is close to my home	1	2	3	4	5
b.	There are a large number of wineries to visit in the immediate area	1	2	3	4	5
c.	Vacation packages are offered to the region	1	2	3	4	5
d.	Wineries in the region have good signage	1	2	3	4	5
e.	Moderately priced accommodations	1	2	3	4	5
f.	A wide range of regional attractions	1	2	3	4	5
g.	Fine dining and gourmet restaurants	1	2	3	4	5
h.	Local arts and crafts for sale	1	2	3	4	5
i.	A wide range of activities for children	1	2	3	4	5
j.	Specialty shops or markets selling local farm products	1	2	3	4	5

14. WINERY FEATURES: Please rate the importance you would place on each of the following features. Please rate each attribute (*1= no importance; 2= not important; 3= neutral; 4= important; 5= very important*).

		No Importance		Neutral		Very Important
a.	Appealing website	1	2	3	4	5
b.	Winery with a history/story	1	2	3	4	5
c.	Variety of wines	1	2	3	4	5
d.	Special pricing or events for wine club members	1	2	3	4	5
e.	Good customer service	1	2	3	4	5
f.	Food pairings or cooking classes offered	1	2	3	4	5
g.	Car parking (ample spaces/close to entrance/well paved or sealed)	1	2	3	4	5
h.	Winery staff are knowledgeable about wine	1	2	3	4	5

15. Please rate the following. (*1=definitely will not; 2= unlikely; 3=neither likely nor unlikely; 4= likely; 5=very likely*)

		Definitely will not	Unlikely		Likely	Very likely
a.	How likely are you to visit this winery/vineyard in the future?	1	2	3	4	5
b.	How likely are you to visit any winery in NC in the future?	1	2	3	4	5
c.	How likely are you to purchase NC wines in the future?	1	2	3	4	5
d.	How likely are you to attend a NC wine festival in the future?	1	2	3	4	5
e.	How likely are you to recommend this winery/vineyard to others?	1	2	3	4	5
f.	How likely are you to share this winery experience with others via a social media and which ones? ☐Facebook, ☐blog, ☐Twitter	1	2	3	4	5

16. How often do you drink wine? (*Please check only one*)
- ☐ Daily
- ☐ A couple of times per week
- ☐ Once per week
- ☐ 1 to 2 times per month
- ☐ less than once per month
- ☐ Never

17. What type of wine do you prefer? ☐ Dry ☐ Sweet ☐ No preference ☐ Don't know

18. Which of the following types of wines do you drink most often? (*Please check all that apply*)
- ☐ Red wines
- ☐ White wines
- ☐ Rose/Blush wines
- ☐ Sparkling wines
- ☐ Muscadine wine
- ☐ Other fruit flavored wines or mead

19. How important are the following activities for you when visiting a North Carolina winery?
Please rate each activities (*1= no importance; 2= not important; 3= neutral; 4= important; 5= very important*).

		No Importance		Neutral		Very Important
a.	To taste NC wine	1	2	3	4	5
b.	To buy NC wine	1	2	3	4	5
c.	To have a day out	1	2	3	4	5
d.	To socialize with friends and family	1	2	3	4	5
e.	To learn about wine and wine making	1	2	3	4	5
f.	To rest and relax	1	2	3	4	5
g.	To go on a winery tour	1	2	3	4	5
h.	To be able to talk to a winemaker	1	2	3	4	5
i.	To eat and drink at the winery	1	2	3	4	5
j.	To be entertained	1	2	3	4	5
k.	To enjoy the beauty of rural NC vineyards	1	2	3	4	5
l.	To attend a NC wine-related festival or event	1	2	3	4	5
m.	To visit a historical or cultural attraction in the area	1	2	3	4	5
n.	To visit the wine trail	1	2	3	4	5
o.	To buy NC wine related gifts/ souvenirs	1	2	3	4	5
p.	To participate in outdoor recreation activities	1	2	3	4	5
q.	To have a different NC experience	1	2	3	4	5
r.	To experience NC agriculture, farms, or local foods	1	2	3	4	5
s.	To engage in an activity to fill a free weekend or holiday period	1	2	3	4	5

20. Indicate your level of expertise in the following topics of wine knowledge.

		None	Basic	Intermediate	Advanced	Connoisseur
a.	Knowledge of major grape varieties and types of red/white/rose/sparkling wines	1	2	3	4	5
b.	Knowledge of wine region geography, viticulture, and wine types produced in major world regions	1	2	3	4	5
c.	Wine grapes grown and types of wines produced in NC	1	2	3	4	5
d.	North Carolina wine production geography and history	1	2	3	4	5
e.	North Carolina wineries and wine trails/wine tourism	1	2	3	4	5

21. How often do you buy bottles of wine? (*Please check only one*)

- ☐ Daily
- ☐ A couple of times per week
- ☐ Once per week
- ☐ 1 to 2 times per month
- ☐ less than once per month
- ☐ Never

22. In what quantities do you usually purchase bottles of wine? (*Please check only one*)

- ☐ A case of wine or more at a time
- ☐ More than 4 bottles but less than a case
- ☐ Between 2 to 4 bottles at a time
- ☐ 1 bottle at a time
- ☐ I never buy wine in bottles

23. Describe the type of bottles of wine you usually purchase. (*Please check only one*)

- ☐ High end or rare wines (more than $40)
- ☐ Upscale wines ($21-40)
- ☐ Mid-range wines ($10-20)
- ☐ Value wines ($10 or less)
- ☐ I never buy wine in bottles

24. For which purposes do you purchase bottles of wine? (*Please check all that apply*)

- ☐ As gift for other people
- ☐ As a collector for your wine cellar
- ☐ For holidays or celebrations
- ☐ For yourself for immediate consumption
- ☐ Other (please specify) ______________________

25. What do you expect to pay for a bottle of North Carolina wine? (*Please check only one*)

- ☐ Less than $10
- ☐ From $10 to 14.99
- ☐ From $15 to 19.99
- ☐ From $20 to 24.99
- ☐ From $25 to 29.99
- ☐ Over $30.00

26. Please rate your level of agreement with each of the following statements. Please rate each statement (*1= strongly disagree; 2= disagree 3= neutral; 4= agree; 5= strongly agree*).

		Strongly Disagree				Strongly Agree
a.	Drinking wine is an activity that is personally important to me	1	2	3	4	5
b.	Drinking wine is an activity that is important among my peers	1	2	3	4	5
c.	I prefer wine over other alcoholic beverages, e.g., beer, spirits	1	2	3	4	5
d.	I believe wine is an affordable product for me	1	2	3	4	5
e.	I often buy and give wine as gifts to family, friends, or associates	1	2	3	4	5
f.	I view drinking wine as primarily an activity for special occasions/holidays	1	2	3	4	5
g.	I view drinking wine as a part of my everyday activities	1	2	3	4	5
h.	I view wine as a luxury product I buy to treat myself well	1	2	3	4	5
i.	I believe there are positive health benefits in drinking wine	1	2	3	4	5
j.	Drinking wine helps me to relax and reduces my stress	1	2	3	4	5
k.	Drinking wine is important to my self-image	1	2	3	4	5
l.	Drinking wine will help me achieve my social goals	1	2	3	4	5
m.	Drinking wine will help me in my career advancement	1	2	3	4	5
n.	Drinking wine is mostly about having an experience, not the product itself	1	2	3	4	5
o.	Building a quality personal wine collection is important to me	1	2	3	4	5
p.	I belong to winery clubs or wine-drinking social groups	1	2	3	4	5

27. Please rate your level of agreement with each of the following statements. Please rate each statement (*1= strongly disagree; 2= disagree 3= neutral; 4= agree; 5= strongly agree*).

		Strongly Disagree				Strongly Agree
a.	I enjoy the taste of North Carolina wines I have tried	1	2	3	4	5
b.	I am loyal to one or more North Carolina wineries or wines	1	2	3	4	5
c.	I believe North Carolina wines are priced to give me value for my money	1	2	3	4	5
d.	I believe the North Carolina wines I have tried are mostly of high quality	1	2	3	4	5
e.	I believe that North Carolina wines make good gifts to give to others	1	2	3	4	5

Demographics

Instructions: The last few questions are about you. Your answers will help us to better understand visitors to NC wineries.

28. What is your race/ethnic group?

- ☐ White
- ☐ Hispanic
- ☐ Asian
- ☐ Black or African American
- ☐ American Indian or Alaska Native
- ☐ Native Hawaiian or Other Pacific Islander
- ☐ Multi-racial/ multi-ethnic
- ☐ Other (*please specify*) ____________________

29. What year were you born? ________

30. What is your gender? ☐ Male ☐ Female

31. What occupational classification do you best fit in? (*Please check only one*)

- ☐ Professional/ Executive
- ☐ Clerical/ Sales/ Craftsman/ Factory Worker
- ☐ Homemaker
- ☐ Retired
- ☐ Student (Full Time)
- ☐ Military
- ☐ Self-employed
- ☐ Unemployed
- ☐ Other (please specify) ____________________

32. What is the highest degree that you have earned? (*Please check only one*)

- ☐ High school or less
- ☐ Some college – no degree
- ☐ Completed college with an Associate's Degree
- ☐ Completed college with an Bachelor's Degree
- ☐ Post graduate college

33. Which category is closest to your total family income? (*Please check only one*)

- ☐ less than $25,000
- ☐ $25,000-$49,999
- ☐ $50,000-$74,999
- ☐ $75,000-$99,999
- ☐ $100,000-124,999
- ☐ $125,000-$149,999
- ☐ $150,000-$199,999
- ☐ $200,000+

34. What is your favorite music type? (*Please check all that apply*)

- ☐ Adult contemporary
- ☐ Country
- ☐ Oldies
- ☐ Top 40
- ☐ Classical
- ☐ Christian
- ☐ Rhythm and Blues
- ☐ Hip Hop
- ☐ Rap
- ☐ Rock
- ☐ Heavy Metal
- ☐ Other (please specify)

35. What are your preferred social media sites?

- ☐ Facebook
- ☐ Twitter
- ☐ Personal blog
- ☐ Linked-in
- ☐ Google+
- ☐ Don't visit social media sites
- ☐ Other (Please specify) ________________