NORTHERN ARIZONA UNIVERSITY
The W. A. Franke College of Business

The Arizona Wine Tourism Industry

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Executive Summary

This survey of visitors to Arizona's wine tourism regions was undertaken to gather market research on a growing industry, including visitor demographics, travel patterns, satisfaction with the experience and spending patterns. This survey process collected a total of 504 surveys from Arizona's three wine growing regions in Santa Cruz, Cochise and Yavapai counties, over a four-month period from February through May of 2011 – a more than sufficient sample size to produce high confidence in these results. This information will assist the wineries, vineyards, tasting rooms and local tourism communities in the wine regions with targeted marketing efforts, product development, and advocacy for a burgeoning industry that is critical to the health of these rural regional economies.

The general profile of Arizona wine visitors is one of middle-aged adult visitor parties, largely from the Greater Phoenix area, who take day trips to the states' wineries, which are located both north and south of the Phoenix metro and Tucson areas. Visitors are attracted by the desire to taste wine, and to relax and socialize with friends. Overwhelmingly, these visitors enjoy their experiences at the state's wineries, finding they offer a welcoming and fun experience. They appreciate the staff, who are knowledgeable about wine and wine production, and the fact that the wineries and vineyards are located in beautiful rural areas of Arizona.

A summary of the specific findings of the Arizona wine tourism survey follows:

- Data for this tourism survey were collected at a number of locations in northern and southern Arizona. The northern wineries accounted for 59.5 percent of all surveys (300 surveys) and the southern wineries accounted for the remaining 40.5 percent (204 surveys).
- The largest group of visitors traveled as family groups (36.7%), followed by family and friends (30.8%), and friends only groups (26.3%).
- The average age of visitors was 46.0 years, roughly equal to the state average of 46.8 years, but younger than the average visitor to some Arizona rural areas; the average age of female visitors was 44.9 years while male visitors were slightly older at 48.4 years.
- The average party was comprised of 3.1 persons, 1.9 women and 1.6 men. Overall, only 3.1 percent of parties traveled with children; in parties traveling with children the average number was 1.9 children per party.
- The average annual income of visitors was $88,149, higher than the state average of $76,000.
- Three-fifths (59.1%) of all wine visitors are in-state residents; out-of-state visitors (40.9%) were led by those from California (7.7%) and Wisconsin (7.1%).
- In Arizona, Phoenix (21.0%) and Scottsdale (9.3%) accounted for the largest single cohorts, followed by Tucson (9.3%). In terms of county origins, Maricopa County contributes more than half (55%) of all wine visitors followed by Pima County (33%).
- Two-fifths (41.3%) of respondents visited a tasting room, while 37.7 percent visited a vineyard, 10.9 percent visited a winery, and the remainder, visited a festival or related-wine event (2%).

- Almost one-third (29.0%) of the sample have never visited an Arizona winery before, while 6.8 percent have visited 11 or more Arizona wineries in the past 12 months (average 4 visits/year).
- Two-thirds (69.1%) of visitors had never visited the specific venue where they were surveyed, while 10.6 percent indicated that they visited 11 or more times; average visits/year was three.
- Brochures (31.8%) were the most popular method of hearing about wineries, vineyards or tasting rooms, followed by the Internet (24.1%), and the Arizona Wines and Vines publication (19.8%). A surprising 14.2 percent heard about the winery from a hotel concierge.
- Arizona wine visitors overwhelmingly agree (98.1%) with the statement, "it does not have to be a special occasion to enjoy wine," and 92.3 percent agree with the statement "drinking wine gives me pleasure." Obviously Arizona wine visitors are wine savvy and enjoy the experience.
- Not surprisingly, "to taste wine," is the most important reason to visit a winery, followed by, "to have a day out," "to socialize with friends," to "rest and relax," and "to enjoy the beauty of rural Arizona vineyards." Other motivations are also important including: buying wine, driving a wine trail, and learning about wine making.
- A large majority of visitors (70.4%) made purchases at the winery where they were surveyed, spending an average of $70 and purchasing an average of 3.3 bottles. Other purchases made at the wineries average $41 on food and $30 on merchandise.
- More than four-fifths (82.7%) of all respondents said that their experience at the winery or tasting room was either "a little better than I expected," or "much better than I expected." A glowing endorsement of the customer service and value of the experience.
- A majority (61.2%) of wine tourism visitors were on day trips, while a further one-third (38.8%) were on overnight trips.
- Most overnight visitors (45.0%) stayed in a hotel or motel, while a further 15.8 percent stayed at the homes of family and friends, and 12.2 percent stayed in Bed & Breakfasts.
- More wine tourists stayed overnight in Sedona (42.6%), followed by Cottonwood (10.9%) and Tucson (9.0%) than in any other overnight locations.
- Day visitors had an average of $149 in direct spending, with restaurant and grocery expenditures ($44) accounting for the largest portion.
- Overnight visitors had average expenditures of $370, with lodging or camping ($140) comprising the single largest item.
- When comparing Arizona wine tourists to those in a 2006 study by the U.S. Travel Industry Association, the following differences emerge: females (68% vs. 54%) accounted for a larger portion of visitors in the Arizona study; Arizona visitors are older than those in the TIA study; and, Arizona visitors travel more as family groups than with friends, and take far more day trips (61.2%) than the national study (19%).
- Arizona wine visitors had an estimated $22.7 million in direct expenditures, which resulted in an indirect economic impact of $4.3 million, and induced impacts of $10.5 million for a total industry economic impact of $37.6 million. Indirect business taxes based on direct expenditures produced an additional $5.9 million and the total economic impact supported 265 direct jobs and 140 indirect and induced jobs, for a total of 405 jobs.

Table of Contents

List of Tables

List of Figures

The Arizona Wine Tourism Industry

Introduction

Arizona's nascent wine tourism industry has made great strides over the last decade. Arizona has had wine grape production and a small scale wine industry since the early 1960s, but recent advances in viticulture and an infusion of interest in wineries and wine production has led to increased growth. Wineries in Arizona are located in two distinct areas in the southeast and north-central parts of the state. The southeast wineries, the oldest and most established, are located in the Santa Cruz County communities of Sonoita and Elgin, and in Cochise County near Dragoon and Willcox. The northern wineries are a newer phenomenon, developing over the last decade in the Verde Valley of Yavapai County, where wineries are concentrated in the communities of Page Springs, Cottonwood and Jerome.

While Arizona's wine industry is not nearly as large or well-known as that of Napa and Sonoma Counties in California, it has started to develop as a valid wine producer. As of 2009, 44 licensed wineries exist in Arizona, with over 650 acres of vines planted statewide. These vines produced 66,000 gallons of wine in 2009 equivalent to 21,064 cases. The production is split somewhat evenly between the southeastern and the Verde Valley vineyards, with the latter accounting for 32,000 gallons in 2006. The local and regional grape content of Arizona wines has increased steadily as more acres are planted to vines. Verde Valley blends now contain 80-90% local grapes up from 50% a few years ago. There are also 10 licensed tasting rooms in Arizona, with an estimated 139,700+ visits in 2009. The Arizona wineries, while still niche producers compared to California, have seen a steady improvement in both the quantity and quality of the wine produced. Recently, wines from the Verde Valley won several first and second place prizes in a prestigious American tasting competition.

Wine and culinary tourism opportunities have also begun to develop alongside the wineries in southern and northern Arizona. The linkages between winery tasting room visits and tourism is well established. The wine industry in California is a major tourism driver for that state, even spawning movies such as "Sideways," which highlighted the newer wine region around Santa Barbara. Arizona now has its first film about wine production, Maynard Keenan and Eric Glomski's, "Blood into Wine," which chronicles the development of the Northern Arizona wine industry. Wine tourism, linked with culinary, eco and agricultural tourism, is expanding in most major wine growing regions of the world – France, Spain, Germany, Italy, the U.S., South Africa, Australia, New Zealand, Austria, and Chile. In California alone, the number of visitors to California wineries increased from 14.8 million in 2002 to 19.7 million in 2005.

Arizona's budding wine industry is also an important contributor to the preservation of agricultural land and local crop production. The Verde Valley wineries and vineyards have encouraged the preservation of open space while providing both income opportunities and local jobs. The wine industry in the Verde Valley employs about 70 people full-time in agricultural production, with more employed in tasting rooms, producing an annual payroll of $1,285,000 and wine sales of $5.3 million in 2009 (University of Arizona, *The Economic Contributions of Verde Valley Winemaking,* 2010). The economic impacts of this industry, while small when compared to some California regions, are important to the economic well-being of these rural communities. Wineries, vineyards and tasting rooms are also considered to be "base" or export industries that "sell their products outside the community, bringing money into the community." Calculations from a recent University of Arizona study show that the Verde Valley wineries are 75-78% basic, thereby generating considerable economic benefits to their local communities.

While the economic benefits of the wine industry in Arizona may pale in comparison to other industries such as manufacturing or micro-electronics, the real strength of this niche market is in the value-added tourism experience. Wineries, vineyards and tasting rooms act as an attraction to tourists, providing a wine-related experience in a rural, agricultural setting. All wineries in the state are located in rural counties (Santa Cruz, Cochise and Yavapai) and rural communities (Sonoita, Elgin, Jerome, Page Springs and Cottonwood). Tourism generated by wine production and tasting room visits therefore benefits rural communities disproportionally, encouraging other tourism-related industries and strengthening the economic base of the local communities and regions.

The size and scope of the economic contribution of the vineyard and wine industry to the economy of Arizona have already been described by the University of Arizona (2010) study. The next logical step, therefore, is an examination of the value-added impact of tourists who visit these wineries, vineyards and tasting rooms. The remainder of this study examines the demographics, trip activities, winery visits and expenditures of Arizona wine tourists. This kind of data provides valuable information about this growing niche market, which can be used for targeted marketing and product development, and further highlight the importance of agri-tourism to the state.

Methods

This survey was conducted by the Arizona Hospitality Research and Resource Center (AHRRC) at Northern Arizona University and was commissioned by the Arizona Office of Tourism (AOT). The cooperation of the Southern Arizona Wine Growers Association and the Verde Valley Wine Consortium as well as the individual wineries, vineyards and tasting rooms around the state were critical to this effort. The survey was distributed at participating wineries, vineyards and tasting rooms over a four-month period from February through May of 2011. The survey was conducted over this four-month period to coincide with the time that the wineries are most active. Weather plays an important role in both the growth of grapes and in visits by tourists to vineyards and tasting rooms. Both the southern and northern wine regions experience a slowing trend during the summer months.

All vineyards where wine is sold, in both the northern and southern regions of the state, were encouraged to participate in the study; only those sites that agreed to distribute surveys to their guests were included in the study. A total of 11 sites distributed the survey in the northern region of the state, and nine sites participated in the southern region. Staff at these sites were instructed on how to distribute the survey to visitors, according to the survey distribution schedule which called for surveying during one week a month (sometimes adding days until quotas were reached). All completed surveys were returned to the AHRRC for processing, scanning and data analysis.

Generally the survey proceeded with few problems. Some of the tasting rooms and wineries used incentives (e.g., discounts on purchases) to encourage visitor participation, while others did not. A total of 504 surveys were collected over the four month period. The northern region accounted for 300 surveys, or 59.5 percent of the total, while the southern wineries accounted for 204 surveys or 40.5 percent of the total. The sample size for the survey is deemed to be more than sufficient to describe the overall wine tourists as well as the tourists in the specific regions. The margin of error for this study is +/- 4.9 percentage points at the 95% confidence level. See Table 1.1.

Table 1.1. Surveys per winery region

	Count	%
Northern Region	300	59.5%
Southern Region	204	40.5%
Total	504	100.0%

Demographic Characteristics of Wine Tourism Visitors

Party Characteristics of Wine Tourist

On visits to the state's wineries, more than one-third (36.7%) of wine tourists travel as family groups, while roughly another third (30.8%) travel as groups of family and friends, and one-fourth (26.3%) visit wineries with friends only. Other party types account for much smaller percentages: those traveling alone account for 2.9 percent, followed by business associates (2.6%) and organized tours groups (0.8%). Noticeable differences occur between the regions when considering party types. Winery visitors in the north are dominated by family only and family and friend visitor parties (41.3% and 28.6% respectively). In the south, the party type is more evenly divided between family and friends (34.0%) and family only (30.0%). Little difference existed between the regions in the friends only groups – 26.5 percent in the northern and 26.0 percent in southern region. Thus, family only groups (41.3%) represent four of every ten visitors to northern wineries, while the southern wineries are more evenly spread between family and friends (34.0%) and family only (30.0%). See Table 1.2.

Table 1.2. Party characteristics of visitors, by wine regions and overall

Who is in your visitor party today?	State winery region		
	North	South	Overall
Family and Friends	28.6%	34.0%	30.8%
Family Only	41.3%	30.0%	36.7%
Friends only	26.5%	26.0%	26.3%
Nobody traveling alone	2.1%	4.0%	2.9%
Organized Tour or Group	.0%	2.0%	.8%
Business Associates	1.6%	4.0%	2.6%
Total	100.0%	100.0%	100.0%

Gender

Overall, twice as many women (67.6%) as men (32.4%) were in the survey sample, although more men (38.5%) were present in the northern region than in the southern (22.0%). These findings do not necessarily imply more women visitors overall, but may simply mean that more women than men completed the survey instrument. See Table 1.3

Table 1.3. Gender by wine regions and overall

	State winery region		
	Northern Region	Southern Region	Overall
Female	61.5%	78.0%	67.6%
Male	38.5%	22.0%	32.4%
Total	100.0%	100.0%	100.0%

Age of Wine Tourists

Overall, the average age of Arizona wine visitors was 46.0 years old, the same as the average age for overnight visitors statewide, of 46.8 years in 2009. (Note: Comparison of results in this report to state visitor figures are derived from 2009 Arizona Office of Tourism visitation profiles available at www.azot.gov). One-fifth (19.7%) of all wine visitors are 30 years or younger, while twice as many (41%) are between the ages of 31 and 50 years of age. Therefore, a significant three-fifths (61%) of all wine tourists are 50 years or younger. The remaining 39 percent of all visitors are older than 50 years, with the 51 to 65 year old age group accounting for the majority (33.1%) of the over 50 year old age group; the remainder (6%) is in the 66 year and older age group. See Figure 1.4.

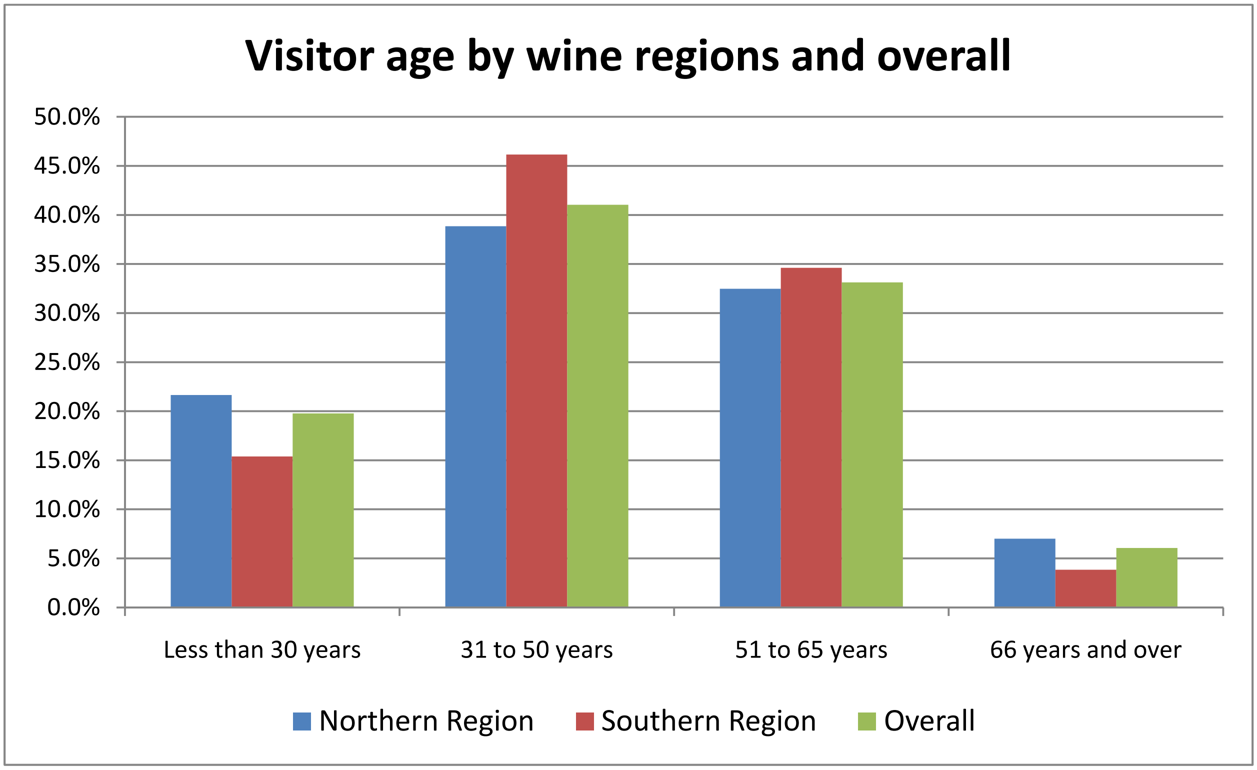
When comparing regions, the northern region has the largest number of visitors who are under 30 years of age (21.7%), compared to the southern region where 15.4 percent of visitors are in the under 30 age group. On the other hand, the southern region leads the northern region in the next two age groups: the 31 to 50 year olds (46.2% in the south vs. 38.9% in the north), and those aged 51 to 65 years (34.6% in the south vs. 32.5% in the north). However, almost twice as many 66 year old visitors were in the northern region (7.0%) as in the southern region (3.8%). The average age in the northern region is 46.5 years, while the average age in the southern region is 44.7 years. See Table 1.5.

Table 1.4. Visitor age by wine regions and overall

	Northern Region	Southern Region	Overall
20 and under	.6%	.0%	.4%
21 - 25 years	5.7%	7.7%	6.3%
26 - 30 years	15.3%	7.7%	13.0%
31 - 35 years	7.6%	15.4%	10.0%
36 - 40 years	11.5%	11.5%	11.5%
41 - 45 years	5.7%	11.5%	7.5%
46 - 50 years	14.0%	7.7%	12.1%
51 - 55 years	10.8%	11.5%	11.0%
56 - 60 years	10.2%	15.4%	11.7%
61 - 65 years	11.5%	7.7%	10.3%
66 - 70 years	3.2%	.0%	2.2%
71 - 75 years	.6%	3.8%	1.6%
76 years and older	3.2%	.0%	2.2%
Total	100.0%	100.0%	100.0%

Mean age Northern Region = 46.5 years
Mean age Southern Region = 44.7 years
Mean age Overall study = 46.0 years

Figure 1.1. Visitor age by wine regions and overall



Visitor Age by Gender

When comparing the age of wine tourism visitors by their gender, few differences exist between the regions. The youngest females, with an average age of 43.4 years are found in the southern region, whereas the youngest males with an average age of 48.6 years are found in the northern region. Overall the average age of female visitors is 44.9 years, while the average age of male visitors is 48.8 years. See Table 1.5.

Table 1.5. Visitor age by gender for wine regions and overall

	Northern Region		Southern Region		Overall	
	Female	Male	Female	Male	Female	Male
20 and under	.0%	1.5%	.0%	.0%	.0%	1.2%
21 - 25 years	4.9%	4.6%	12.5%	.0%	7.4%	3.5%
26 - 30 years	13.4%	16.9%	12.5%	.0%	13.1%	12.8%
31 - 35 years	11.0%	4.6%	6.3%	25.0%	9.4%	9.5%
36 - 40 years	14.6%	6.2%	6.3%	12.5%	11.8%	7.7%
41 - 45 years	7.3%	4.6%	18.8%	.0%	11.1%	3.5%
46 - 50 years	14.6%	13.8%	6.3%	12.5%	11.8%	13.5%
51 - 55 years	9.8%	12.3%	18.8%	.0%	12.8%	9.3%
56 - 60 years	8.5%	13.8%	6.3%	37.5%	7.8%	19.5%
61 - 65 years	8.5%	15.4%	12.5%	.0%	9.9%	11.7%
66 - 70 years	3.7%	1.5%	.0%	.0%	2.4%	1.2%
71 - 75 years	.0%	1.5%	.0%	12.5%	.0%	4.2%
76 years & older	3.7%	3.1%	.0%	.0%	2.4%	2.3%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Average age in years	45.6 years	48.6 years	43.4 years	49.5 years	44.9 years	48.4 years

Party Size

The average party size for wine tourists is 3.1 persons, slightly larger than the average state visitor party of 2.6 persons. The 3.1 persons in the average party are comprised of 1.9 women, and 1.6 men, with only a very small percentage (3.1%) of parties including children under age 18. If children were present in the traveling party, the average number of children was 1.9. When comparing wine tourism regions, party sizes were larger in the southern region (3.6 persons) versus the northern (2.7 persons). More women per party were found in the south (2.3) than the north (1.7), while more men (1.8 vs. 1.5) than women were found in the northern region. The southern region had slightly more children in the party (2.0 vs. 1.9) when children were present. The average party size of northern region visitors, 2.7 persons, is slightly less than the state party size for the northern region overall, 2.9 persons, whereas, the southern region party size, 3.6 persons is far larger than the state southern region party size of 2.2 persons. See Table 1.6.

Table 1.6. Party size characteristics of visitors by wine regions and overall

	Northern Region	Southern Region	Overall
Total number of people in your party	2.7	3.6	3.1
Number of women	1.7	2.3	1.9
Number of men	1.5	1.8	1.6
Number of children under 18 years old	1.9	2.0	1.9
Percent parties with children	3.5%	7.5%	3.1%

Income

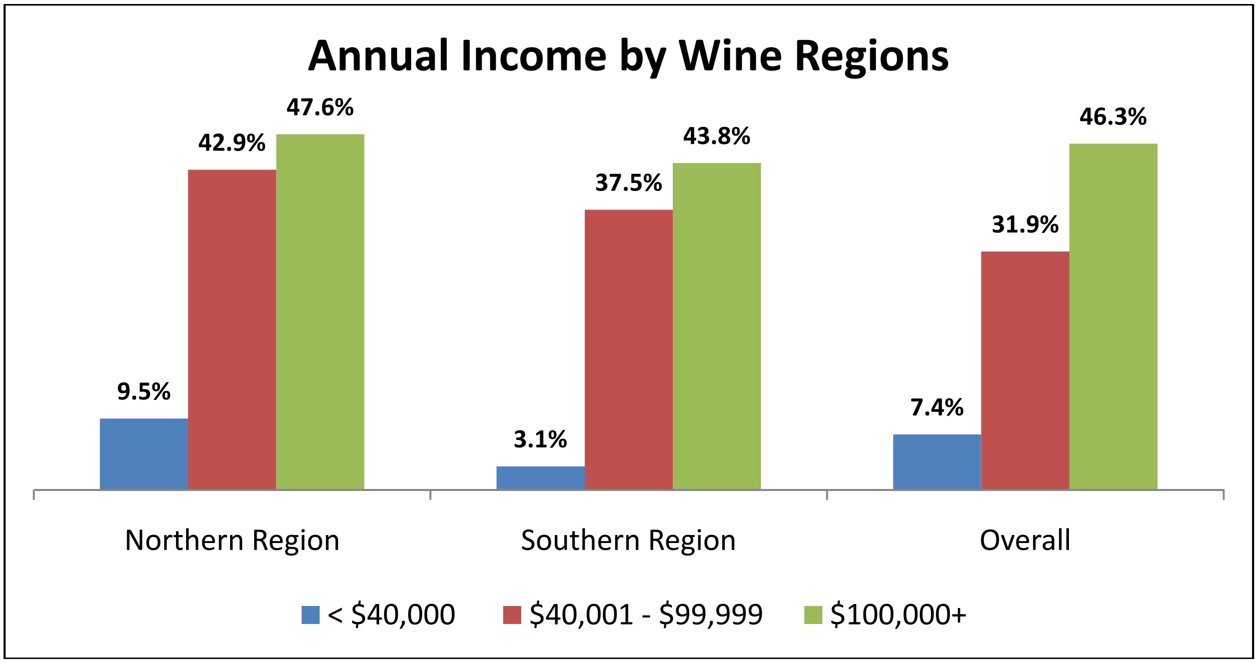
Visitors to the state's wine regions have higher than average household incomes ($88,149 from mid-points) than do visitors to the state overall ($76,000). In fact, one-third of all wine visitors (33.5%) have incomes in excess of $120,000 annually, and a further 12.8 percent of total respondents have annual household incomes between $100,000 and $119,999. When combined, almost half of respondents (46.3%) have incomes in excess of $100,000 annually, and therefore the ability to make such discretionary purchases. Fewer than 10 percent of all respondents (7.4%) had incomes below $40,000.

When considering the wine regions, the visitors in the southern region have slightly higher annual average incomes ($89,375) than the northern region ($87,547). The northern region, however, has a larger proportion of visitors with $100,000+ incomes (47.6%) than the southern region (4.8%). On the other hand, the northern region also has three times more (9.5%) respondents with annual incomes under $40,000, than the southern region (3.1%). See Table 1.7 and Figure 1.2.

Table 1.7 Annual household income

	Northern Region	Southern Region	Overall
Less than $19,000	1.2%	.0%	.8%
$20,000 to $39,999	8.3%	3.1%	6.6%
$40,000 to $59,999	17.3%	18.8%	17.8%
$60,000 to $79,999	11.9%	18.8%	14.2%
$80,000 to $99,999	13.7%	15.6%	14.3%
$100,000 to $119,999	16.1%	6.3%	12.8%
$120,000 and above	31.5%	37.5%	33.5%
Total	100.0%	100.0%	100.0%
Average annual income	$87,547	$89,375	$88,149

Figure 1.2. Annual income by wine regions and overall



State of origin of wine tourism visitors

Almost two-thirds of all visitors (59.1%) to Arizona's wineries are in-state residents. Other states providing significant numbers of visitors are: California (7.7%) and Wisconsin (7.1%). Visitors from Wisconsin are more than likely winter visitors or snowbirds, along with those from the eastern states of New York (1.6%), Illinois (3.5%) and Ohio (3.2%), who are typical of winter, long-stay visitors in Arizona. Overall, the northern region has more in-state visitors (62.3%) than the southern region (53.7%); whereas the southern region (9.8%) has more visitors from California, than does the northern region (6.6%). See Table 1.8.

Table 1.8. State of origin

	Northern Region	Southern Region	Total
Arizona	62.3%	53.7%	59.1%
California	6.6%	9.8%	7.7%
Wisconsin	2.7%	14.6%	7.1%
Washington	1.6%	7.3%	3.7%
Illinois	5.5%	0.0%	3.5%
Ohio	2.2%	4.9%	3.2%
Texas	2.7%	0.0%	1.7%
New York	1.1%	2.4%	1.6%
Utah	1.1%	2.4%	1.6%
Colorado	2.2%	0.0%	1.4%
Michigan	0.5%	2.4%	1.2%
Oklahoma	0.5%	2.4%	1.2%
Massachusetts	1.6%	0.0%	1.0%
New Jersey	1.6%	0.0%	1.0%
Florida	1.1%	0.0%	0.7%
Pennsylvania	0.5%	0.0%	0.3%
Virginia	0.5%	0.0%	0.3%
Maryland	0.5%	0.0%	0.3%
Georgia	0.5%	0.0%	0.3%
Indiana	0.5%	0.0%	0.3%
North Dakota	0.5%	0.0%	0.3%
Wyoming	0.5%	0.0%	0.3%
Idaho	0.5%	0.0%	0.3%
New Mexico	0.5%	0.0%	0.3%
Nevada	0.5%	0.0%	0.3%
Oregon	0.5%	0.0%	0.3%
Alaska	0.5%	0.0%	0.3%
Total	100.0%	100.0%	100.0%

Arizona city of origin of wine tourism visitors

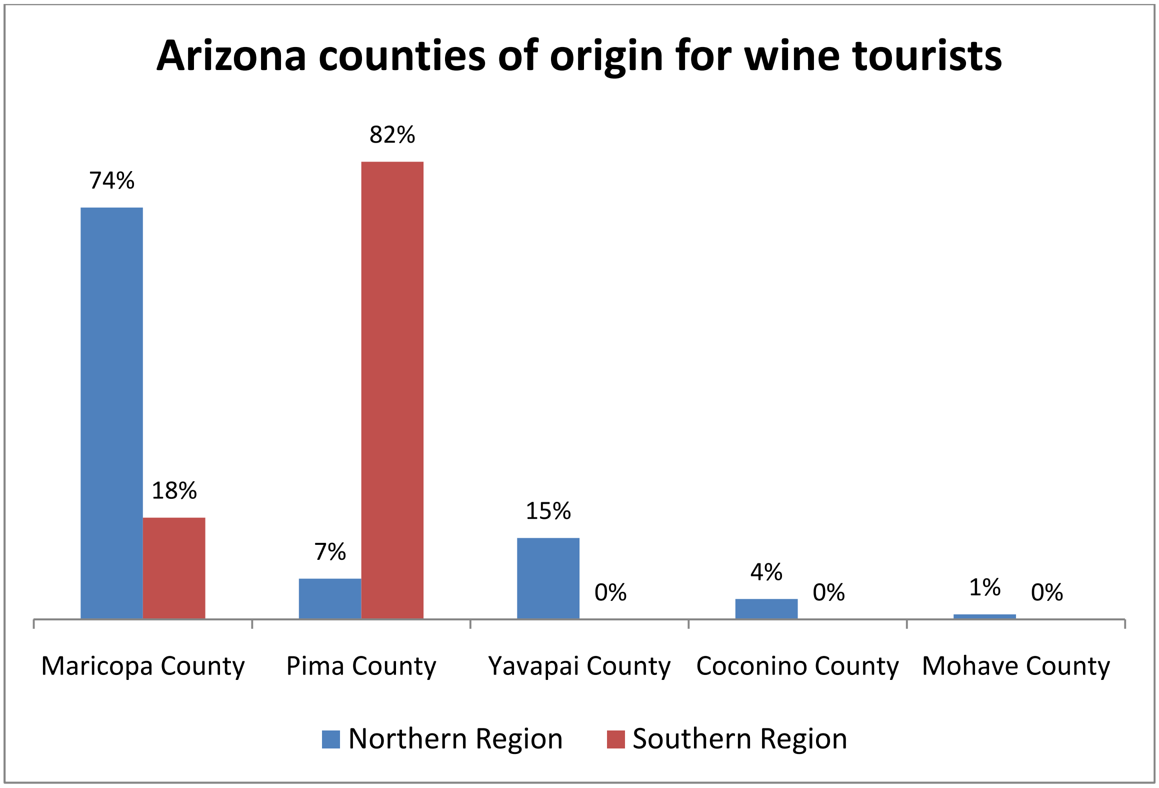
Overall, the city of Phoenix (21.0%) accounts for the largest single group of wine tourists in the state. Other cities in Maricopa County that provide large numbers of wine tourism visitors are Scottsdale (9.3%), Chandler (4.5%), Mesa (4.2%) and Tempe (2.7%). Maricopa County accounts for 55 percent of all wine visitors in the study, while Pima County accounts for 33 percent. Tucson by itself accounts for a significant 9.3 percent of all wine visitors. Yavapai County accounts for 10 percent of wine visitors, while the balance come from Coconino (2%) and Mohave Counties (1%).

Regionally, visitation patterns are more concentrated. In the northern region, Maricopa County accounts for almost three-fourths (74%) of all visits to the wineries, while in the southern wine region Pima County is the origin for four-fifths (82%) of all winery visitors. Maricopa County does, however, supply 18 percent of visitors to the southern wine region, and Pima County supplies a small number (7%) of visitors to the northern region. Lying somewhat equidistant between the northern and southern wine producing regions, Maricopa County residents frequent the northern regions more, while Pima County dominates the southern winery markets. Visitors from Yavapai County only visit the northern wineries and do not appear to go to the south at all. See Table 1.9.

Table 1.9. Arizona city of origin

Arizona City	Northern Region	Southern Region	Overall
Phoenix	31.8%		21.0%
Scottsdale	11.8%	4.5%	9.3%
Tucson		27.3%	9.3%
Fort Lowell		18.2%	6.2%
Chandler	4.5%	4.5%	4.5%
Mesa	6.4%		4.2%
Cottonwood	5.5%		3.6%
Corona De Tucson - Vail		9.1%	3.1%
Sierra Vista		9.1%	3.1%
Laveen	4.5%	0.0%	3.0%
Tempe	1.8%	4.5%	2.7%
Green Valley	3.6%		2.4%
Prescott	3.6%		2.4%
Flagstaff	2.7%		1.8%
Gilbert	2.7%		1.8%
Glendale	2.7%		1.8%
Sun City	2.7%		1.8%
Avondale		4.5%	1.5%
Oro Valley		4.5%	1.5%
Rincon		4.5%	1.5%
Sahuarita		4.5%	1.5%
Sun Lakes		4.5%	1.5%
Sedona	1.8%		1.2%
Sun City West	1.8%		1.2%
Bullhead City	0.9%		0.6%
Camp Verde	0.9%		0.6%
Cave Creek	0.9%		0.6%
Clarkdale	0.9%		0.6%
Cornville	0.9%		0.6%
Fountain Hills	0.9%		0.6%
Goodyear	0.9%		0.6%
Groom Creek	0.9%		0.6%
Kino	0.9%		0.6%
New River	0.9%		0.6%
Parks	0.9%		0.6%
Paulden	0.9%		0.6%
Peoria	0.9%		0.6%
Total	100.0%	100.0%	100.0%

Figure 1.3. Arizona counties of origin for wine tourists



International Visitors

International visitors comprise only 1.2 percent of the sample- a total of only five respondents. Four international visitors in the sample were from the United Kingdom (0.9%) and one was from Canada (0.3%). Regionally, the Canadian visitor was surveyed in the northern region and visitors from the United Kingdom were contacted in the southern region. See Table 1.10.

Table1.10. International Visitors

	Northern Region	Southern Region	Overall
Arizona	62.0%	52.4%	58.4%
Other States	37.5%	45.2%	40.4%
United Kingdom	0.0%	2.4%	0.9%
Canada	0.5%	0.0%	0.3%

Annual Average Income of Arizona Wine Visitors

Finally, which communities or counties contributed visitors with the highest average annual incomes? In the northern region, Coconino County visitors have the highest annual incomes ($115,000), followed by Maricopa County visitors ($90,621), and Yavapai County visitors ($61,190). The Coconino County cohort is, however, very small (2.7%), whereas the Maricopa County cohort, while having lower annual average incomes of $90,621, accounts for about three-fourths (74%) of the northern market. However, Maricopa County visitors to the southern region (18%) have larger annual incomes ($120,000) than do Pima County visitors ($91,500) who account for 82 percent of visits to the southern wine region. The counties, communities and average annual incomes are listed in Table 1.11.

The remainder of the study examines the wine tourism experience in Arizona's wine growing regions, along with the tourist expenditures related to wine tourism visits. The study concludes with an economic impact analysis of the wine tourism industry in Arizona.

Table 1.11. Average annual household income of winery visitors by county and community

County	City	Northern Region	Southern Region
Coconino	Flagstaff	$110,000	
Coconino	Parks	$120,000	
Maricopa	Gilbert	$60,000	
Maricopa	Avondale		$120,000
Maricopa	Chandler	$112,000	$120,000
Maricopa	Fountain Hills	$120,000	
Maricopa	Glendale	$96,667	
Maricopa	Goodyear	$120,000	
Maricopa	Laveen	$112,000	
Maricopa	Mesa	$88,571	
Maricopa	New River	$50,000	
Maricopa	Peoria	$110,000	
Maricopa	Phoenix	$89,968	
Maricopa	Scottsdale	$86,154	$120,000
Maricopa	Sun City West	$50,000	
Maricopa	Sun City	$63,333	
Maricopa	Sun Lakes		$120,000
Maricopa	Tempe	$110,000	$120,000
Mohave	Bullhead City	$50,000	
Pima	Corona De Tucson - Vail		$120,000
Pima	Fort Lowell		$92,500
Pima	Green Valley	$50,000	
Pima	Kino	$30,000	
Pima	Rincon		$120,000
Pima	Sahuarita		$50,000
Pima	Tucson		$75,000
Yavapai	Camp Verde	$50,000	
Yavapai	Clarkdale	$50,000	
Yavapai	Cornville	$90,000	
Yavapai	Cottonwood	$85,000	
Yavapai	Groom Creek	$30,000	
Yavapai	Prescott	$63,333	
Yavapai	Sedona	$60,000	

The Wine Tourism Experience

Type of winery

Respondents were asked to identify the winery, vineyard or tasting room where they received the survey. Overall, a majority of wine tourists in the survey visited a tasting room that was not located at a vineyard (41.3%). This is the case for a large number of wine tourism sites in Arizona, where tasting rooms are located in communities that are not adjacent to the parent vineyards. More than one-third of respondents (37.7%), however, did visit a vineyard, while 19.0 percent visited a winery. Finally, a small number of respondents (2.0%) were contacted while attending a wine-related festival.

When comparing the two wine growing regions, more tasting rooms were visited in the northern region (53.0%), than in the south (24.5%), while more vineyards were visited in the south (49.0%) than in the north (29.8%). Twice as many wineries were visited in the southern region (26.5%) than in the northern region (13.8%). See Table 2.1.

Table 2.1. Is your visit today to a:

	Northern Region	Southern Region	Overall
Vineyard	29.8%	49.0%	37.7%
Winery	13.8%	26.5%	19.0%
Tasting Room not at vineyard	53.0%	24.5%	41.3%
Wine-related festival or event	3.3%	.0%	2.0%
Total	100.0%	100.0%	100.0%

How Many Times Have You Visited Wineries

How frequently do Arizona wine tourists visit wineries in the state and how often have they visited the site where they received the survey? On average, wine tourists have visited an average of four Arizona wineries in the past 12 months, and visited the specific winery where they received the survey at least three times previously. Regionally, southern visitors tended to have slightly higher repeat visits to Arizona wineries (5 a year) and had visited the specific winery or vineyard where they received the survey at least five times before. In the northern region, the visitors have visited four Arizona wineries a year, but were less frequent visitors to the winery where they were surveyed (2 prior visits in the north vs. 5 prior visits in the south). See Table 2.2.

Table 2.2 Number of visits to wineries

	Northern Region	Southern Region	Overall
How many Arizona wineries have you visited in the last 12 months?	4	5	4
How many times have you visited this site **BEFORE** today's visit?	2	5	3

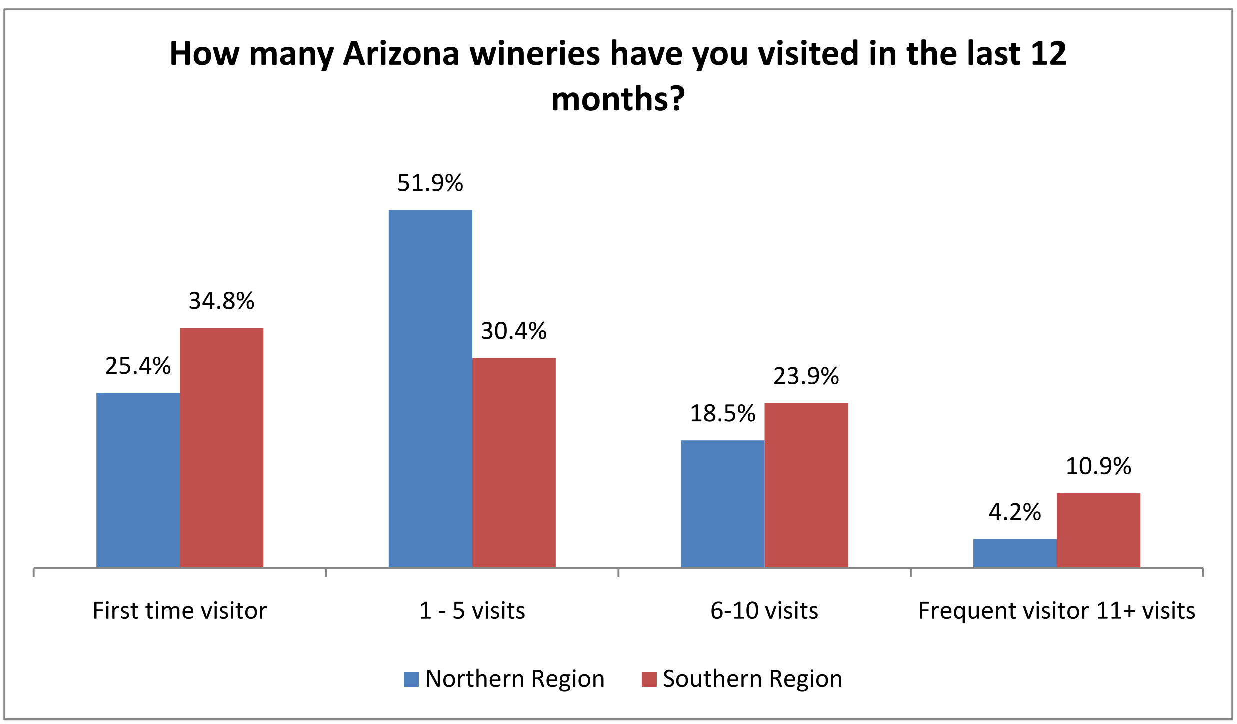
Almost one third (29.0%) of the overall sample had never visited an Arizona winery before, while 6.8 percent have visited 11 or more Arizona wineries in a year. The large number of first-time visitors to Arizona wineries indicates a considerable latent demand among Arizonans who have never been to a winery before. Of course, a relatively small but significant portion (6.8%) of all visitors consists of frequent Arizona winery visitors.

When considering regional visits to Arizona wineries, more first-time visitors appeared in the southern region, where fully one-third, (34.8%) indicated that they have never visited an Arizona winery before. First-time visitors to wineries in the northern region accounted for one-fourth (25.4%) of all visitors. On the other hand, southern wineries were twice as likely (10.8%) to have frequent visitors who visited more than 11 wineries a year, than northern wineries that had fewer frequent visitors (4.2%). See Table 2.3. and Figure 2.1.

Table 2.3 How many Arizona wineries have you visited in the last 12 months?

	Northern Region	Southern Region	Overall
Never visited before	25.4%	34.8%	29.0%
1 visit	13.2%	4.3%	9.8%
2 visits	12.7%	8.7%	11.2%
3 visits	13.8%	10.9%	12.6%
4 visits	7.9%	4.3%	6.6%
5 visits	4.2%	2.2%	3.4%
6 visits	3.2%	10.9%	6.1%
7 visits	3.7%	2.2%	3.1%
8 visits	3.7%	.0%	2.3%
9 visits	1.1%	2.2%	1.5%
10 visits	6.9%	8.7%	7.6%
11-20 visits	2.6%	6.5%	4.1%
21 or more visits	1.6%	4.3%	2.7%
Total	100.0%	100.0%	100.0%

Figure 2.1. How many Arizona wineries have you visited in the last 12 months?



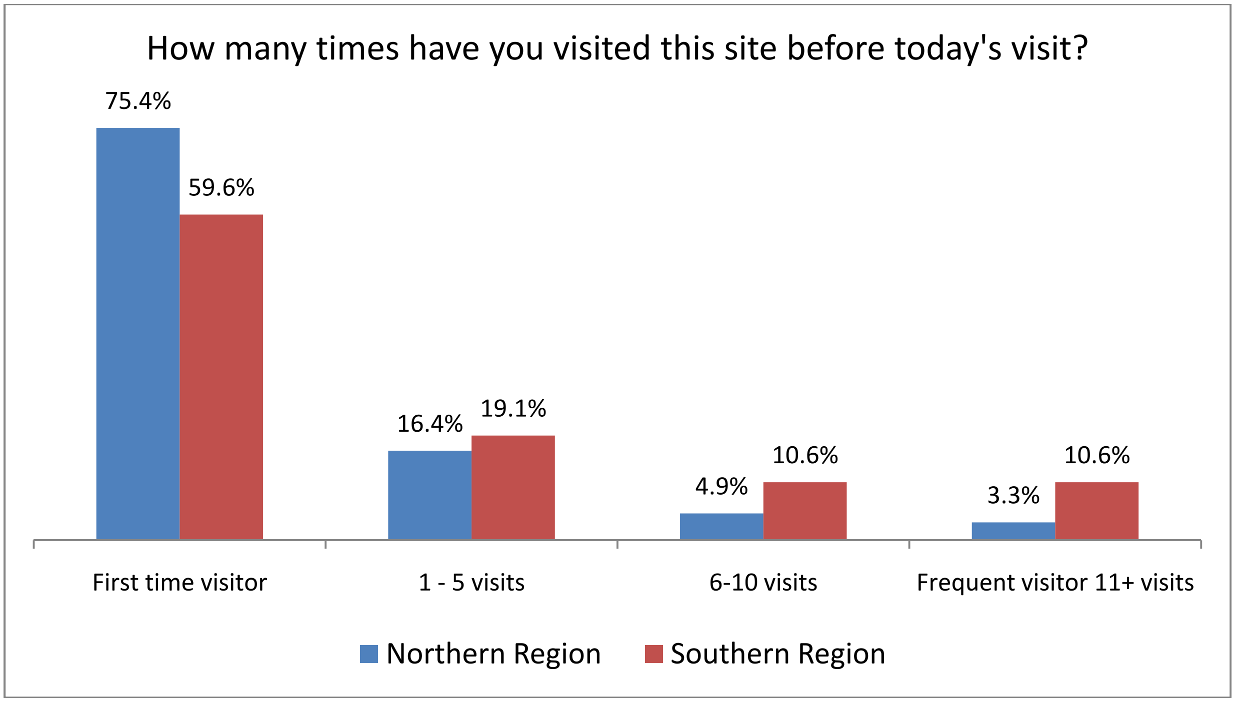
Overall, two-thirds (69.1%) of all visitors had never visited the winery where they received the survey, while 6.2 percent had visited that specific winery more than 11 times. Again, this reflects a relatively large percentage of first-time or new winery customers. Many of these visitors, while familiar with other Arizona wineries, were broadening their reach in choosing new experiences at other sites.

Three-fourths of all visitors in the northern region (75.4%) were first-time visitors, compared to three-fifths (59.6%) who were first-time visitors in the southern region. For frequent visitors, the pattern is reversed; southern wineries have a greater frequency of visitors who have visited the wineries 11 or more times (10.7%), when compared to the northern region where this group accounts for only 3.2 percent. See Table 2.4. and Figure 2.2.

Table 2.4. How many times have you visited this site before today's visit?

	Northern Region	Southern Region	Overall
Never visited before	75.4%	59.6%	69.1%
1 visit	9.8%	6.4%	8.5%
2 visits	3.3%	4.3%	3.7%
3 visits	1.1%	4.3%	2.4%
4 visits	.5%	2.1%	1.2%
5 visits	1.6%	2.1%	1.8%
6 visits	2.2%	8.5%	4.7%
7 visits	.5%	.0%	.3%
8 visits	.0%	2.1%	.8%
9 visits	.0%	.0%	.0%
10 visits	2.2%	.0%	1.3%
11-20 visits	1.6%	6.4%	3.5%
21 or more visits	1.6%	4.3%	2.7%
Total	100.0%	100.0%	100.0%

Figure 2.2. How many times have you visited this site before today's visit?



Wineries Visited in the North and South

Which of the 44 licensed and bonded wineries in Arizona are the most visited? Wineries in the north and south were listed and respondents were asked to check as many of the wineries or vineyards that they had visited at any time. While not exhaustive, the list was comprised of all the wineries, vineyards and tasting rooms in operation at the time of the survey.

In the north, Page Springs Cellar (58.7%) was the most frequently visited site, followed by Javelina Leap (46.1%) located adjacent to Page Springs Cellar. The Arizona Stronghold tasting room in Cottonwood (43.5%) was the next most popular site, followed closely by Oak Creek Vineyards and Alcantara Vineyard and Winery. Other sites received varying frequencies of visits. See Table 2.5.

Table 2.5 Which of these Arizona Wineries/Vineyards or tasting Rooms have you visited at any time - Northern Region

	Percent
Page Springs Cellar	58.7%
Javelina Leap Winery	46.1%
Arizona Stronghold Tasting Room	43.5%
Oak Creek Vineyards	40.7%
Alcantara Vineyard and Winery	34.8%
Jerome Winery	32.7%
Caduceus Cellars & Merkin Vineyards	31.8%
Pillsbury Wine Company North	28.1%
Bitter Creek Winery	15.1%
Art of Wine	10.8%
San Dominique Winery	6.3%
Frietas	6.2%
Granite Creek Winery	4.3%
Juniper Well Ranch	2.5%

In the south, Sonoita Vineyards was the most frequently mentioned site (58.3%), followed by Callaghan Vineyards (53.5%), and Kief-Joshua Vineyard (46.5%). Other frequently visited vineyards are the Village of Elgin – Four Monkeys (46.1%) and the Dos Cabezas Wine Works (40.1%). See Table 2.6.

Table 2.6 Which of these Arizona Wineries/Vineyards or tasting Rooms have you visited at any time - Southern Region

	Percent
Sonoita Vineyards	58.3%
Callaghan Vineyards	53.5%
Kief-Joshua Vineyard	46.5%
Village of Elgin-Four Monkeys	46.1%
Dos Cabezas Wine Works	40.1%
Canelo Hills Winery	38.9%
Wilhelm Family Vineyards	32.6%
Lightning Ridge Cellars	26.3%
Rancho Rossa Vineyards	25.1%
Charron Vineyards	19.4%
Keeling-Schaefer Vineyards	14.4%
Carlson Creek Winery	8.2%
Coronado Vineyards	2.9%
Colibri Vineyards	2.6%
Lawrence Dunham Vineyards	2.3%

How did you hear about the winery/vineyard/tasting room?

What sources are used most frequently to find information on Arizona wineries? Wine tourists, like all tourists, need information to guide their trips and have a wide variety of sources from which to choose. These sources range from newspaper and magazine articles to wine publications and social media. The next section of the study examine the information sources used most often by wine tourists in Arizona.

Interestingly, almost one-third (31.8%) of all respondents used a very traditional source – brochures – to find out about the wineries. Brochures were followed by a very modern information source, the Internet (24.1%). The next most used source was the “Arizona Wines and Vines” publication (19.8%), a specialty wine tourism publication for Arizona. The next information source was concierges (14.2%), who are usually found in full-service hotels where they help guests with bookings and activities. Concierges can help to steer new business to wineries and tasting rooms if they have the information. Word-of-mouth is the next most popular information source (8.8%); it may be a truism but none-the-less valid, that happy visitors will tell others about their experiences. Social media, a relatively new phenomenon, was used by 7.7 percent of visitors. At 7.6 percent each, newspaper and magazine articles also served as viable information outlets. Other information sources are used by relatively few visitors.

Regionally, wine tourist information sources mirror those of the overall sample. The most popular sources of information in both north and south are brochures (33.5% and 29.2% respectively), followed by the Internet (24.9% and 22.9% respectively), and “Arizona Wines and Vines “(20.5% and 18.8% respectively). It is only at the fourth most popular information source that the regions diverge; in the north concierges are the fourth most popular choice (16.8%), whereas in the south it is newspaper articles (12.5%). Next, the north follows with word-of-mouth (9.2%) and Social Media (8.6%), while the south found concierges (10.4%) magazine articles (8.3%) and word-of-mouth (8.3%). See Table 2.7.

Table 2.7 How did you hear about this winery/vineyard/tasting room?

	Northern Region	Southern Region	Overall
Brochures	33.5%	29.2%	31.8%
Internet	24.9%	22.9%	24.1%
Arizona Vines and Wines	20.5%	18.8%	19.8%
Concierge	16.8%	10.4%	14.2%
Word-of-mouth	9.2%	8.3%	8.8%
Social Media	8.6%	6.3%	7.7%
Newspaper articles	4.3%	12.5%	7.6%
Magazine articles	7.0%	8.3%	7.6%
Restaurants	3.8%	4.2%	3.9%
Wine trail publications	3.8%	2.1%	3.1%
Arizona Office of Tourism materials	2.7%	0.0%	1.6%
Other way you heard about this winery-tasting room?	2.2%	0.0%	1.3%

Motivations for visiting Arizona wineries

Why do people visit wineries? There are a variety of reasons why people participate in wine tourism activities; for some it is entirely about the wine experience, while for others the winery may be just another activity on their tourist agenda. To understand better the motivations for visiting Arizona wineries, the survey asked respondents their level of agreement or disagreement with several statements, including: "For me visiting a winery means much more than just drinking wine;" "Wine is important to my lifestyle;" "Drinking wine gives me pleasure;" and, "It does not have to be a special occasion to enjoy wine." Their responses appear in Table 2.8.

The high levels of agreement and high mean scores for all of these suggest the important role that wine plays for most respondents. The highest mean score (4.7 out of a possible 5) was for the statement "It does not have to be a special occasion to enjoy wine." This question had the highest level of agreement of any of the questions, with 24 percent agreeing and a further 74.2 percent strongly agreeing with the statement, for basically unanimous (98.1%) agreement. There is little doubt that wine tourists enjoy and want to visit wineries. The statement with the next highest level of agreement (92.3%) was, "Drinking wine gives me pleasure" (4.5), followed by "I have a strong interest in wine," and "For me visiting a winery means much more than just drinking wine," both with mean scores of 4.2 out of a possible 5. The final two questions had lower but still above average mean scores, "Wine is important to my lifestyle" (mean score of 3.8), and "Visiting wineries is an important part of who I am," with a mean score of 3.3.

Generally, these responses highlight the importance of the wine experience and the special occasions that winery visits constitute. These themes of the enjoyment derived from wine and the educational and experiential nature of winery visits will be explored later in this study. See Table 2.8.

Table 2.8 Indicate your level of agreement with the following statements about your reasons for visiting Arizona wineries – overall

	Strongly Disagree (1)	Disagree (2)	Neither Agree nor Disagree (3)	Agree (4)	Strongly Agree (5)	Mean
For me visiting a winery means much more than just drinking wine	4.6%	2.4%	11.4%	30.2%	51.4%	4.2
Visiting wineries is an important part of who I am	6.8%	13.1%	35.8%	27.6%	16.7%	3.3
I have a strong interest in wine	1.7%	1.5%	8.9%	50.2%	37.8%	4.2
Wine is important to my lifestyle	3.0%	8.6%	20.5%	39.1%	28.9%	3.8
Drinking wine gives me pleasure	.0%	.3%	7.4%	30.5%	61.8%	4.5
It does not have to be a special occasion to enjoy wine	.3%	1.2%	.3%	24.0%	74.2%	4.7

1 = Strongly Disagree
5 = Strongly Agree

Regionally, there was a great deal of consistency in responses to these statements. Slight differences existed between the northern and southern regions for some of the statements, but the differences are not significant, with total agreement across all regions regarding the statement, "It does not have to be a special occasion to enjoy wine," with mean scores in both regions of 4.7. See Table 2.9.

Table 2.9 Indicate your level of agreement with the following statements (mean scores) about your reasons for visiting Arizona wineries – by region

	Northern Region	Southern Region	Overall
	Mean	Mean	Mean
For me visiting a winery means much more than just drinking wine	4.2	4.2	4.2
Visiting wineries is an important part of who I am	3.5	3.1	3.3
I have a strong interest in wine	4.3	4.1	4.2
Wine is important to my lifestyle	3.9	3.7	3.8
Drinking wine gives me pleasure	4.6	4.4	4.5
It does not have to be a special occasion to enjoy wine	4.7	4.7	4.7

Reasons for visiting Arizona wineries

Tourists have many reasons for visiting any specific area and wine tourists are no different. The next set of questions explores a list of 18 reasons that might motivate wine tourists. Respondents were asked to rate these reasons on a scale from 1 to 5, where 1 is "most definitely not a reason to visit," and 5 is "most definitely a reason," to visit the winery/vineyard or tasting room. The general categories of 18 reasons can be grouped into: enjoying the winery experience, socialization, visiting historical or cultural attractions, and outdoor recreation.

Ranked by mean scores, the most important reason for visiting wineries, not surprisingly, is to taste wine, with a mean score of 4.7 out of 5. On the importance scale, three-fourths (77.5%) indicated that it was "most definitely a reason," and 18.0 percent of all respondents indicated that it was "somewhat of a reason" for a score of 95.5 percent. This is not a surprising result since the survey was conducted at wineries and vineyards.

The next four major reasons in order of their mean scores, have less to do with the wine per se and more to do with the social experience: "To have a day out" (mean score 4.5); "To socialize with family and friends" (mean score 4.4); "To rest and relax" (mean score 4.3); and, "To enjoy the beauty of rural Arizona vineyards" (mean score 4.2). This group captures tourist motivations to relax, socialize and rejuvenate. The only other factors that rated a 4.0 or above (i.e., somewhat to definitely a reason for the visit) are "to buy wine" and "to have a different Arizona experience" (both with mean scores of 4.0).

Other wine-related reasons, such as "to learn about wine and wine making" (mean score 3.9), "to eat and drink wine at the winery" (3.8), "to go on a winery or wine cellar tour" (3.4), "to be able to talk to the vintner" (3.3), "to visit a wine route or trail (see all the wineries in an area)" (3.3), and "to buy wine related gifts or souvenirs" (3.0), all rated lower than "somewhat of a reason for the visit."

Other general non-wine reasons that rated lower included: "being entertained" (3.7), "to experience Arizona agriculture" (3.3), "to visit a historical or cultural attraction in the area" (2.9), "to participate in outdoor recreation activities (hiking mountain biking etc)" (2.8). See Table 2.10.

Table 2.10. Which of the following would you say were the reason(s) for your visit to Arizona wineries/vineyards/tasting rooms- Overall?

	Most Definitely Not (1)	Not a Reason (2)	Neither (3)	Somewhat of a Reason (4)	Most Definitely a Reason (5)	Mean
To taste wine	2.2%	0.0%	2.2%	18.0%	77.5%	4.7
To have a day out	1.0%	3.6%	3.8%	26.3%	65.3%	4.5
To socialize with family and friends	2.2%	4.6%	8.3%	23.5%	61.3%	4.4
To rest and relax	2.6%	3.6%	7.6%	35.1%	51.1%	4.3
To enjoy the beauty of rural Arizona vineyards	1.0%	5.6%	8.9%	37.1%	47.4%	4.2
To buy wine	2.6%	5.2%	12.3%	48.7%	31.1%	4.0
To have a different Arizona experience	2.2%	4.9%	16.4%	44.2%	32.3%	4.0
To learn about wine and wine making	3.8%	8.5%	15.6%	39.9%	32.2%	3.9
To eat and drink wine at the winery	3.4%	9.8%	17.1%	39.4%	30.4%	3.8
To be entertained	4.2%	12.0%	21.3%	39.1%	23.5%	3.7
To go on a winery or wine cellar tour	8.2%	15.0%	28.7%	29.6%	18.4%	3.4
To experience Arizona agriculture	7.8%	16.4%	31.5%	27.3%	16.9%	3.3
To be able to talk to the vintner	8.6%	15.4%	29.5%	31.5%	15.0%	3.3
To visit a wine route or trail (see all the wineries in an area)	5.6%	19.9%	30.4%	29.2%	15.0%	3.3
To buy wine related gifts or souvenirs	9.5%	26.6%	26.5%	26.7%	10.7%	3.0
To visit a historical or cultural attraction in the area	12.2%	22.2%	32.8%	24.9%	7.9%	2.9
To attend a wine-related festival or event	14.3%	23.4%	34.0%	18.2%	10.1%	2.9
To participate in outdoor recreation activities (hiking mountain biking etc)	16.6%	24.9%	29.9%	17.9%	10.7%	2.8

When comparing the regions on reasons for the visit, several statistically significant differences appear. Differences between the regions are significant at the 0.05 level, indicating that differences noted in the table are not likely to have been the result of chance. To taste wine rated higher in the south (4.8) than in the north (4.6), as did "to have a day out" (4.6 in south compared to 4.5 in north), and "To enjoy the beauty of rural Arizona vineyards" (4.5 south compared to 4.1 north). On the other hand, northern wine tourists scored significantly higher on rest and relaxation (4.4 in north compared to 4.1 in south), "To participate in outdoor recreation activities (hiking mountain biking etc)" (3.0 north compared to 2.5 south), and "To experience Arizona agriculture" (3.4 compared to 3.1). These differences are no doubt linked to other attractions and activities available in each region, i.e., the availability of mountain biking and hiking in the Sedona and Verde Valley area produces a higher level of interest in that activity. See Table 2.11, 2.12. and 2.13, for separate breakouts of the wine tourism regions.

Table 2.11. Which of the following would you say were the reason(s) for your visit to Arizona wineries/vineyards/tasting rooms – comparison of mean scores north and south

	Northern Region	Southern Region
	Mean	Mean
To taste wine	4.6	4.8*
To buy wine	4.0	4.0
To have a day out	4.5	4.6*
To socialize with family and friends	4.4	4.4
To learn about wine and wine making	3.9	3.8
To rest and relax	4.4*	4.1
To go on a winery or wine cellar tour	3.3	3.5
To be able to talk to the vintner	3.3	3.3
To eat and drink wine at the winery	4.0*	3.6
To be entertained	3.6	3.8
To enjoy the beauty of rural Arizona vineyards	4.1	4.5*
To attend a wine-related festival or event	2.9	2.8
To visit a historical or cultural attraction in the area	3.0	2.8
To visit a wine route or trail (see all the wineries in an area)	3.3	3.3
To buy wine related gifts or souvenirs	2.9	3.3
To participate in outdoor recreation activities (hiking mountain biking etc)	3.0*	2.5
To have a different Arizona experience	3.9	4.1
To experience Arizona agriculture	3.4*	3.1

*significant at the 0.05 level

Table 2.12. Which of the following would you say were the reason(s) for your visit to Arizona wineries/vineyards/tasting rooms – Northern Region?

Northern	Most Definitely Not (1)	Not a Reason (2)	Neither (3)	Somewhat of a Reason (4)	Most Definitely a Reason (5)	Mean
To taste wine	3.8%	0.0%	3.8%	15.2%	77.2%	4.6
To have a day out	1.6%	3.3%	4.9%	28.6%	61.5%	4.5
To rest and relax	1.6%	3.2%	4.3%	36.2%	54.6%	4.4
To socialize with family and friends	3.8%	2.2%	7.0%	27.0%	60.0%	4.4
To enjoy the beauty of rural Arizona vineyards	1.6%	6.6%	13.7%	37.4%	40.7%	4.1
To eat and drink wine at the winery	1.6%	6.9%	13.8%	44.4%	33.3%	4.0
To buy wine	1.6%	5.9%	13.4%	51.3%	27.8%	4.0
To have a different Arizona experience	3.8%	5.4%	10.8%	53.5%	26.5%	3.9
To learn about wine and wine making	3.7%	7.4%	18.1%	35.6%	35.1%	3.9
To be entertained	4.4%	9.3%	26.8%	43.2%	16.4%	3.6
To experience Arizona agriculture	3.9%	19.1%	27.5%	30.9%	18.5%	3.4
To be able to talk to the vintner	7.2%	17.1%	29.3%	29.8%	16.6%	3.3
To visit a wine route or trail (see all the wineries in an area)	4.9%	21.2%	29.9%	29.3%	14.7%	3.3
To go on a winery or wine cellar tour	9.3%	19.1%	26.2%	26.2%	19.1%	3.3
To visit a historical or cultural attraction in the area	9.3%	26.2%	27.3%	25.1%	12.0%	3.0
To participate in outdoor recreation activities (hiking mountain biking etc)	10.2%	28.3%	25.7%	21.9%	13.9%	3.0
To attend a wine-related festival or event	14.4%	26.0%	28.7%	17.7%	13.3%	2.9
To buy wine related gifts or souvenirs	8.7%	30.1%	32.8%	21.9%	6.6%	2.9

Table 2.13. Which of the following would you say were the reason(s) for your visit to Arizona wineries/vineyards/tasting rooms – Southern Region?

Southern	Most Definitely Not (1)	Not a Reason (2)	Neither (3)	Somewhat of a Reason (4)	Most Definitely a Reason (5)	Mean
To taste wine	0.0%	0.0%	0.0%	22.0%	78.0%	4.8
To have a day out	0.0%	4.2%	2.1%	22.9%	70.8%	4.6
To enjoy the beauty of rural Arizona vineyards	0.0%	4.1%	2.0%	36.7%	57.1%	4.5
To socialize with family and friends	0.0%	8.2%	10.2%	18.4%	63.3%	4.4
To rest and relax	4.2%	4.2%	12.5%	33.3%	45.8%	4.1
To have a different Arizona experience	0.0%	4.1%	24.5%	30.6%	40.8%	4.1
To buy wine	4.3%	4.3%	10.6%	44.7%	36.2%	4.0
To learn about wine and wine making	4.0%	10.0%	12.0%	46.0%	28.0%	3.8
To be entertained	3.9%	15.7%	13.7%	33.3%	33.3%	3.8
To eat and drink wine at the winery	6.0%	14.0%	22.0%	32.0%	26.0%	3.6
To go on a winery or wine cellar tour	6.5%	8.7%	32.6%	34.8%	17.4%	3.5
To visit a wine route or trail (see all the wineries in an area)	6.7%	17.8%	31.1%	28.9%	15.6%	3.3
To buy wine related gifts or souvenirs	10.6%	21.3%	17.0%	34.0%	17.0%	3.3
To be able to talk to the vintner	10.6%	12.8%	29.8%	34.0%	12.8%	3.3
To experience Arizona agriculture	14.3%	11.9%	38.1%	21.4%	14.3%	3.1
To attend a wine-related festival or event	14.3%	19.0%	42.9%	19.0%	4.8%	2.8
To visit a historical or cultural attraction in the area	16.3%	16.3%	40.8%	24.5%	2.0%	2.8
To participate in outdoor recreation activities (hiking mountain biking etc)	26.0%	20.0%	36.0%	12.0%	6.0%	2.5

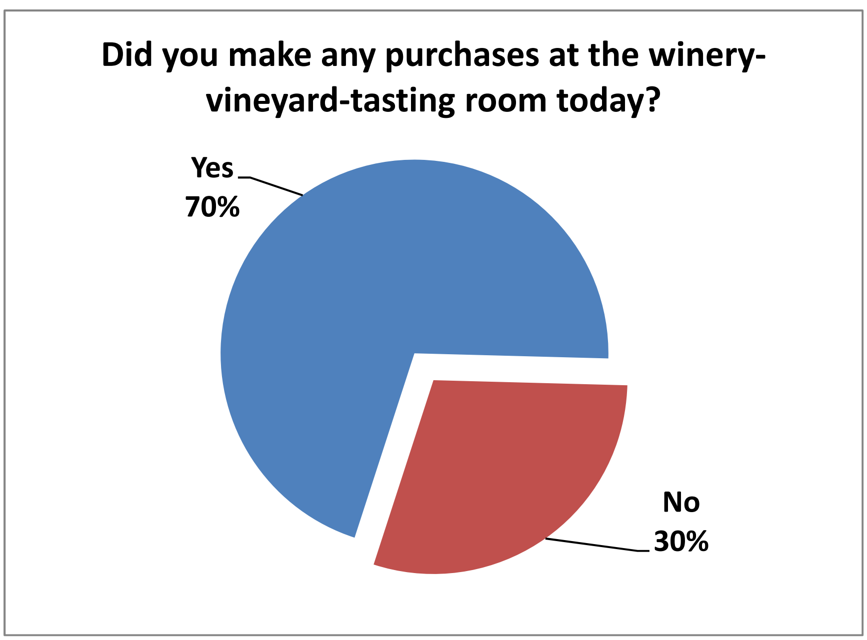
Purchases at Wineries and Tasting Rooms

Winery and tasting room purchases are very important to the individual businesses and owners. These purchases support local employment and community economies. Respondents were asked if they made purchases at the vineyard/winery or tasting room where they received the survey. Almost three-fourths (70.4%) of all wine tourists made purchases at the site where they were surveyed; the remainder (29.6%) indicated that they did not make any purchases. Regionally, more visitors to the northern region (72.6%) made purchases than did those in the southern region (66.7%). See table 2.14, and Figure 2.3.

Table 2.14 Did you make any purchases at the winery-vineyard-tasting room today?

	Northern Region	Southern Region	Overall
Yes	72.6%	66.7%	70.4%
No	27.4%	33.3%	29.6%
Total	100.0%	100.0%	100.0%

Figure 2.3. Did you make any purchases at the winery-vineyard-tasting room today?



How many bottles of wine did you purchase?

Overall, the average wine tourist purchased 3.3 bottles of wine during their visit. Thus, the majority of wine purchases made were less than a case; however, 7.3 percent of respondents purchased a case (12 bottles) or more. When considering regional differences, southern visitors purchased more bottles on average (4.2 bottles) than did northern visitors (2.7 bottles). The other significant difference between northern and southern visitors is the number of large case lot purchases. Southern visitors were four times more likely to purchase 12 or more bottles (13.6%) than were northern visitors (3.3%). See Table 2.15.

Table 2.15 How many bottles of wine did you purchase?

	Northern Region	Southern Region	Overall
1	48.9%	31.8%	42.3%
2	23.3%	22.7%	23.1%
3	10.0%	13.6%	11.4%
4	3.3%	9.1%	5.6%
5	2.2%	.0%	1.4%
6	6.7%	4.5%	5.8%
8	1.1%	.0%	.7%
10	1.1%	4.5%	2.4%
12	1.1%	4.5%	2.4%
15	1.1%	9.1%	4.2%
24	1.1%	.0%	.7%
Total	100.0%	100.0%	100.0%

North = 2.7 bottles
South = 4.2 bottles
Overall = 3.3 bottles

Visitor spending on wine, food and merchandise

When examining the winery purchases of visitors care needs to be exercised in interpreting the results. While 70.4 percent of respondents indicated that they made purchases at the site where they were surveyed, not all of the respondents provided full purchasing information. Overall, visitors spent an average of $70.2 on wine, however only 43.1 percent of all visitors indicated that wine was purchased. Similarly, only 17.3 percent of visitors had food purchases at the wineries and tasting rooms, and for visitors who had these purchases the average was $41.2. Finally, the least number of visitors (13.5%) had souvenir or other merchandise purchases, which averaged $30.7.

For purchased items, differences exist between the regions on all levels. Respondents spent more on wine in the southern region ($81.7) compared to the northern region ($63.8), which is in line with the larger average number of bottles sold in the south. In all other expenditure categories, however, the northern visitors spent more on average than southern visitors, for example food purchases ($44 in north compared to $33 in south), and merchandise purchases ($32.4 in north compared to $28.6 in south). See Table 2.16.

Table 2.16. Purchases made at wineries, vineyards and tasting rooms

	Northern Region	%	Southern Region	%	Overall	%
How much did you spend on wine?	$63.8	46.8%	$81.7	37.7%	$70.2	43.1%
How much did you spend on food?	$44.0	21.4%	$33.3	11.3%	$41.2	17.3%
How much did you spend on merchandise?	$32.4	12.4%	$28.6	15.1%	$30.7	13.5%

How was your overall experience at this particular winery/vineyard or tasting room?

Overall, two-thirds (67.1%) of visitors indicated that their experience at the location where they received the survey was “much better than I expected.” The mean score for the overall sample was 1.5, between “much better” and “a little better.” Less than one-fifth (15.6%) of all visitors indicated that their experience was “a little better than they expected,” and a similar number (15.5%) indicated that their experience was “as they expected.” A relatively insignificant number (1.8%) indicated that the experience was “much worse than they expected.”

When looking at the regions, few differences appeared between northern and southern sites on satisfaction with the visit. The north has only a slightly higher mean score (1.5) than does the south (1.6). In the south, three-fourths (72.3%) of all respondents thought their experience was “much better than expected,” compared to the north where the score for the same statement was lower (62.3%). The difference, however, lies with the fact that in the north one-fifth (20.7%) indicated that their experience was “a little better than they expected,” while fewer (8.5%) southern visitors indicated that was their experience. When combining the two categories of “much better” and “a little better” the northern sites are slightly ahead with scores of 84.0 percent over the southern sites with a score of 80.8 percent. See Table 2.17.

Table 2.17. How was your overall experience at this particular winery-vineyard-tasting room or festival?

	Northern Region	Southern Region	Overall
Much better than I expected (1)	63.3%	72.3%	67.1%
A little better than I expected (2)	20.7%	8.5%	15.6%
As I expected (3)	16.0%	14.9%	15.5%
A little worse than I expected (4)	.0%	.0%	.0%
Much worse than I expected (5)	.0%	4.3%	1.8%
Total	100.0%	100.0%	100.0%

Tourist Trip Characteristics

This section of the study covers the other trip characteristics for visitors to Arizona's wine tourism regions aside from the actual winery or tasting room experiences. This section focuses on trip length, day vs. overnight, type of accommodations for overnight trips, and visitor expenditures.

Trip Length

Overall, almost two-thirds (61.2%) of wine tourism visitors were on a day trip, while the remainder (38.8%) stayed overnight. Considering the locations of the wine regions this is not surprising since both are located near the state's two largest metro areas of Phoenix and Tucson. Regionally, some differences appeared; in particular, there were twice as many overnight trips in the north (48.4%) than in the south (24.5%), and conversely more day-trips in the south (75.5%) than the north (51.6%). The majority of overnight trips in the northern region are linked to the heavily-visited community of Sedona, which is located adjacent to the Verde Valley wineries. See Table 3.1.

Table 3.1. How long are you staying in this area?

	Northern Region	Southern Region	Overall
Day Trip	51.6%	75.5%	61.2%
Overnight Trip	48.4%	24.5%	38.8%
Total	100.0%	100.0%	100.0%

Next, the survey asked for the length of stay for day and overnight trips. The average length of day-trips is 4.7 hours, while the average length of overnight trips is 2.9 nights. Visitors in the southern regions had slightly longer day-trips (5.1 hours) when compared to northern visitors (4.4 hours). The same pattern holds true for overnight visitors; southern region visitors who spent the night stayed on average one night longer in the area (3.5 nights) than did northern visitors (2.6 nights). See Table 3.2.

Table 3.2. How long are you staying in this area?

	Northern Region	Southern Region	Overall
	Mean	Mean	Mean
If a day trip how many hours did you spend in the area?	4.4	5.1	4.7
If staying overnight how many nights did you stay?	2.6	3.5	2.9

Accommodations

About four of ten visitors (38.8%) indicated that they stayed overnight in the area. The next question asked respondents to specify type of accommodation. The largest single group of visitors (45.0%) stayed in a Hotel-Motel, while 18.7 percent stayed in other accommodations. The majority of the other category was comprised of condominiums and time share resorts in the Sedona area and guest cabins. The next largest group of overnight visitors (15.8%) stayed in the homes of family or friends, while 12.2 percent stayed in a Bed & Breakfast, a further 10.9 percent stayed in a RV park, and the remainder 2.8 percent stayed in a campground. See Table 3.3.

Slightly more visitors stayed in hotel-motels in the north (47.8%) than did the south (40.0%), while other accommodations in the north (24.8%) were dominated by the time share and condo market. On the other hand, visitors in the south were three times as likely (28.0%) to stay in the homes of friends or relatives, than were those who visited the north (8.8%). Southern visitors were also twice as likely (16.0%) to stay in an RV park than those in the north (8.0%). This may be a function of the large number of winter long-stay visitors in RV parks and other seasonal accommodations in the Tucson metro area and southern deserts.

Table 3.3. If you stayed overnight where did you stay?

	Northern Region	Southern Region	Overall
Hotel-Motel	47.8%	40.0%	45.0%
Home of friends or family	8.8%	28.0%	15.8%
RV Park	8.0%	16.0%	10.9%
Campground	4.4%	.0%	2.8%
Other accommodation	24.8%	8.0%	18.7%
Bed & Breakfast	12.4%	12.0%	12.2%

If staying overnight what community

Those visitors who stayed overnight while on their trip to the winery were asked to indicate what community they stayed in while on their trip. The community receiving the most mention overall was Sedona (42.6%), followed by Cottonwood (10.9%) in the northern region. The next five communities are found in the southern portion of the state. These communities are Tucson (9%), Sonoita (7.8%), Patagonia (4.7%), Sierra Vista (3.7%), and Green Valley (3.1%). These seven communities account for 82 percent of all responses for this question.

Regionally, the northern communities are dominated by those in the Verde Valley – Sedona (60.2%), Cottonwood (16.7%), Jerome (4.6%), Village of Oak Creek (1.9%) and Camp Verde (1.9%) – although Flagstaff (3.7%) and Prescott (3.7%) also appeared in the north. The southern region is dominated by Tucson (22.7%), Sonoita (22.7%), Patagonia (13.6%), Green Valley (9.1%), Sedona (9.1%), Sierra Vista (9.1%), Bisbee (4.5%), Oro Valley (4.5%) and Tombstone (4.5%).

Table 3.4 If staying overnight what community did you or will you stay in?

	Northern Region	Southern Region	Overall
SEDONA	60.2%	9.1%	42.6%
COTTONWOOD	16.7%	0.0%	10.9%
TUCSON	1.9%	22.7%	9.0%
SONOITA	0.0%	22.7%	7.8%
PATAGONIA	0.0%	13.6%	4.7%
SIERRA VISTA	0.9%	9.1%	3.7%
GREEN VALLEY	0.0%	9.1%	3.1%
JEROME	4.6%	0.0%	3.0%
FLAGSTAFF	3.7%	0.0%	2.4%
PRESCOTT	3.7%	0.0%	2.4%
BISBEE	0.9%	4.5%	2.2%
ORO VALLEY	0.0%	4.5%	1.6%
TOMBSTONE	0.0%	4.5%	1.6%
CAMP VERDE	1.9%	0.0%	1.2%
VILLAGE OF OAK CREEK	1.9%	0.0%	1.2%
CLARKDALE	0.9%	0.0%	0.6%
PHOENIX	0.9%	0.0%	0.6%
PINE	0.9%	0.0%	0.6%
SURPRISE	0.9%	0.0%	0.6%

Visitor Spending

Visitor spending is always a crucial component of any tourism study. Visitors to Arizona's wineries, tasting rooms and vineyards reported a wide variety of expenditures in categories of Lodging-camping, Restaurant and grocery, Transportation (including gas), Shopping, Recreation/tour/entrance fees, and "Other" expenditures. When considering visitor expenditures in the wine regions, expenditures need to be segmented between day and overnight visitors. A prior question found that 61.2 percent of all wine visitors were day visitors and 38.8 percent were staying overnight in the area. Typically overnight visitors tend to have higher total expenditures associated with their trips because of the lodging factor, although other expenditures such as gas and food and beverage expenses can tend to be similarly high.

For day visitors, the highest average expenditures reported were for "other" expenditures ($45) closely followed by restaurant and grocery ($44) then by shopping for jewelry and antiques ($33), and transportation ($31). Recreation, tour, entrance fees or permits ($20) had the least average expenditure in the sample. The "other" expenditure category included such things as casino gaming, and other miscellaneous purchases. Regionally, "other" expenditures all rated high for both the northern and southern regions. See Table 3.5.

Table 3.5 Day Per-Party Visitor Expenditures

	Northern Region	Southern Region	Overall
Number of people expenditures are for	2.7	4.1	3.1
Lodging-Camping	$0	$0	$0
Restaurant & Grocery	$48	$35	$44
Transportation including gas	$32	$28	$31
Shopping-jewelry-antiques	$33	$38	$33
Recreation-Tour-Entrance-Permit fees	$22	$14	$20
Other expenditures	$50	$40	$45
Total	$185	$155	$173

For overnight visitors, lodging and camping ($140) produced the highest average expenditures, followed by restaurant and grocery ($82), transportation ($30), and shopping for jewelry and antiques purchases ($29). Shopping was followed by tour, entrance fees or permits ($16). The "Other" category had relatively high expenditures ($73).

Regionally, lodging-camping and restaurant and grocery were the highest expenditures in both the northern and southern regions followed by "other". Transportation costs were notably higher in the north ($43) as compared to the south ($18). See Table 3.6.

Table 3.6 Overnight Per-Party Visitor Expenditures

Overnight visitor expenditures	Northern Region	Southern Region	Overall
Number of people expenditures are for	2.2	4.0	2.6
Lodging-Camping	$150.3	$115.6	$139.7
Restaurant & Grocery	$79.6	$88.2	$82.1
Transportation including gas	$43.2	$18.1	$30.1
Shopping-jewelry-antiques	$35.5	$17.1	$29.4
Recreation-Tour-Entrance-Permit fees	$15.4	$18.5	$16.4
Other expenditures	$48.9	$66.7	$73.1
Total	$372.9	$324.2	$370.8

Comparing Arizona and National Wine Tourists

In 2006, the U.S. Travel Industry Association (TIA), the Travel & Tourism Research Association, and *Gourmet* magazine conducted a study of 2,364 culinary travelers in the United States titled, *Profile of Culinary Travelers.* The objectives of the study were to:

- Estimate the size of the culinary tourism market among U.S. residents.
- Quantify spending on culinary tourism
- Identify/define/segment culinary tourists among general leisure travelers
- Create a demographic profile of culinary tourists compared to general leisure travelers
- Identify various trip activities that correlate with culinary activities
- Understand research and planning behaviors among both culinary tourists and general leisure travelers
- Understand motivators for culinary tourism
- Understand perceptions of and interest in destinations across the United States as culinary travel destinations
- Gauge potential interest in future culinary travel across the leisure traveler market

The study also investigated wine travelers who were defined in the study as: "Leisure travelers, who participate in wine tours, drive wine trails, taste locally made wines or attend wine festivals."

The study described the culinary and wine tourism market in the U.S. as follows: "While clearly a niche travel market, culinary travel involves millions of travelers spending billions of dollars. Overall, 17% of American leisure travelers have engaged in some type of culinary or wine-related activity while traveling within the past three years. This equates to just over 27 million travelers." (TIA, 2006).

Beyond participating in culinary activities on trips, travelers were divided into groups based on how central these activities were to their trip and the planning process. In the TIA study, "Just under 8 percent of leisure travelers (12.6 million people) report that food or wine-related activities were a key reason they took a trip or helped them choose between destinations." These are classified as "Deliberate" Culinary Travelers. Another 4.7 percent of leisure travelers (7.6 million) can be classified as "Opportunistic" Culinary Travelers, who took at least one trip to seek out culinary activities, although these were not a factor in destination choice. Finally, 4.4 percent of leisure travelers (7.1 million) can be classified as "Accidental" Culinary Travelers because they participated in culinary activities on a trip "simply because they were available."

Comparison between Arizona and TIA study demographics

In this comparison between US Culinary Travelers and Arizona Wine Tourists, the Arizona wine tourists will be subdivided into groups similar to those in the TIA study based upon the importance of the winery visits to their trip. While the question is not the same, the motivations expressed come from the following questions: "Visiting wineries is an important part of who I am," and "For me visiting a winery means much more than just drinking wine." The two questions were measured on the same scale, "strongly disagree" to "strongly agree," and a variable was created to compare to the TIA grouping. When applied to Arizona wine tourists, the population split into three groups, as follows: "deliberate wine tourists" account for half of all respondents (49.5%); "opportunistic wine tourists" account for one-third (33.8%); and, "accidental wine tourists" (16.8%) for the remainder. From this point forward in this portion of the analysis, Arizona refers to the current study of Arizona wine tourists, while TIA refers to the 2006 *Profile of Culinary Travelers*. The groups differ in that Arizona wine tourists are a self selected group specifically encountered at wineries, and thus have slightly higher percentages in the deliberate and opportunistic groups and less in the accidental. See Table 4.1.

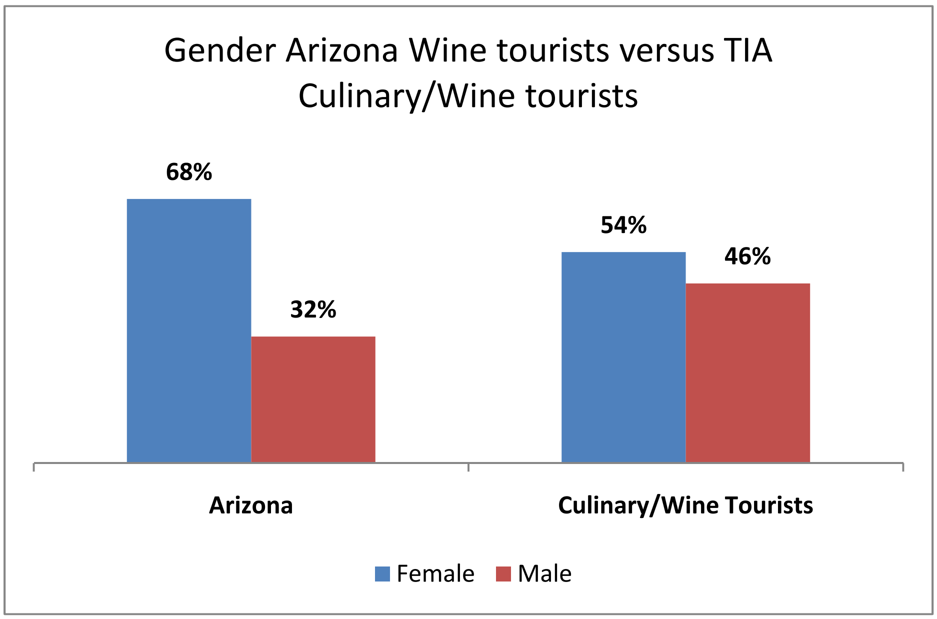
Table 4.1. A comparison of Arizona wine tourists and the TIA's 2006 Profile of Culinary Travelers

	Arizona	TIA
Deliberate wine tourists	49.4%	43.4%
Opportunistic wine tourists	33.8%	28.8%
Accidental wine tourists	16.8%	27.8%
Total	100.0%	100.0%

Gender

More females appeared in Arizona wine travel parties (68%) than in the TIA study of culinary/wine tourists (54%), although women comprised the majority of visitors in both studies. See Figure 4.1.

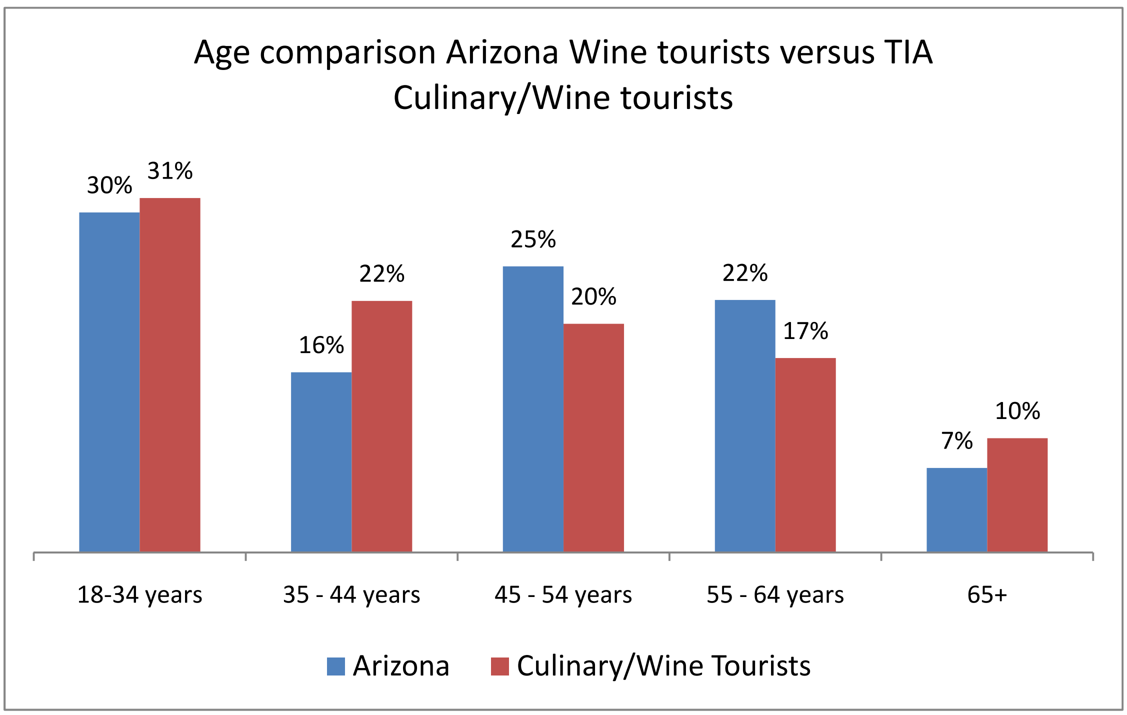
Figure 4.1. Gender Arizona wine tourists versus TIA Culinary/Wine tourists



Age

In terms of age, some differences appeared between the two studies. TIA wine tourists had about the same percentage of respondents in the 18-34 year age group (31%) as the Arizona wine tourists (30%); however, wine tourists in the 35-44 year age group were greater in the TIA study (22%) compared to the Arizona study (16%); and, in the 65+ visitor group (10% compared to 7%). On the other hand, Arizona had more visitors in the 45-54 year age group (25%) compared to TIA (20%), and the 55-64 year age group (22% compared to 17%).

Figure 4.2. Gender Arizona wine tourists versus TIA Culinary/Wine tourists

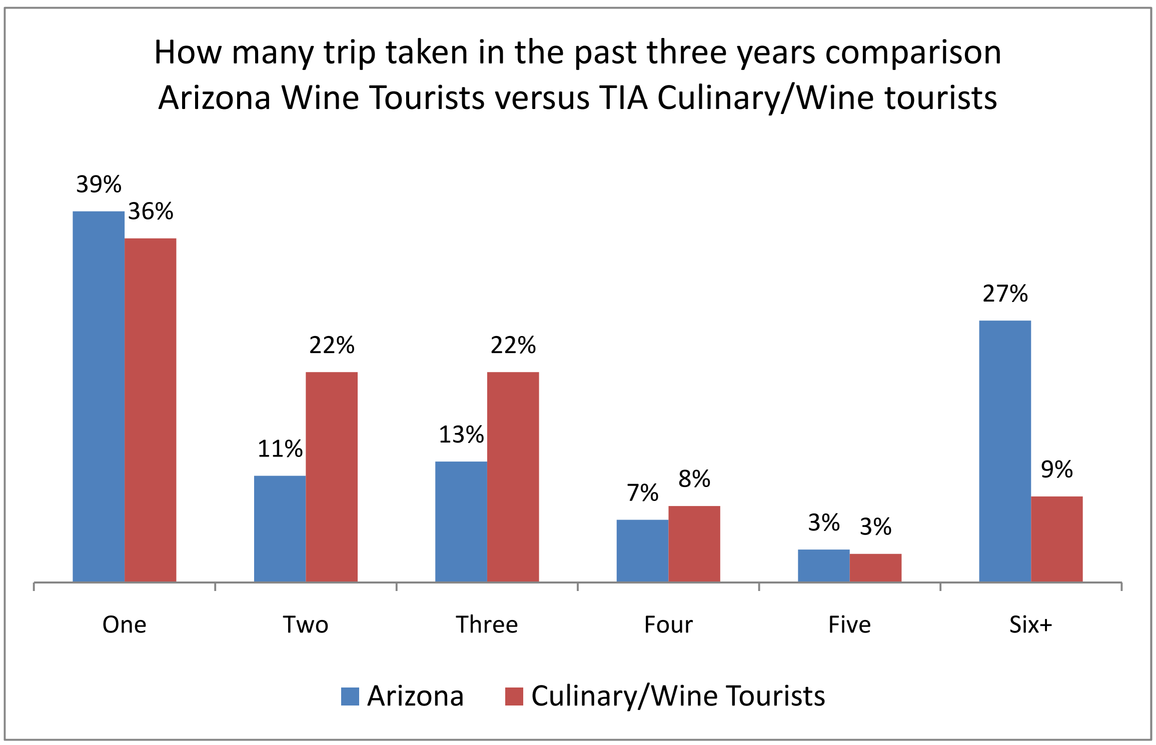


A comparison of annual household income was not possible since the TIA study used different income categories to those used in the Arizona study. The remainder of this profile will focus on activities that are comparable.

Number of Wine Trips Taken in the Past Three Years

The TIA study asked for the number of wine trips taken in the past three years, while the Arizona study asked for trips in the past year. While not directly comparable, the Arizona frequency of trips to wineries is probably an underestimate when compared to the TIA study. In Arizona slightly more wine visitors have made one trip (39% compared to 36%) to a winery. For all other trip frequencies with the exception of 6+ trips, TIA study tourists made more frequent trips. However, Arizona wine visitors are three times more likely than the TIA study participants to make 6 or more trips.

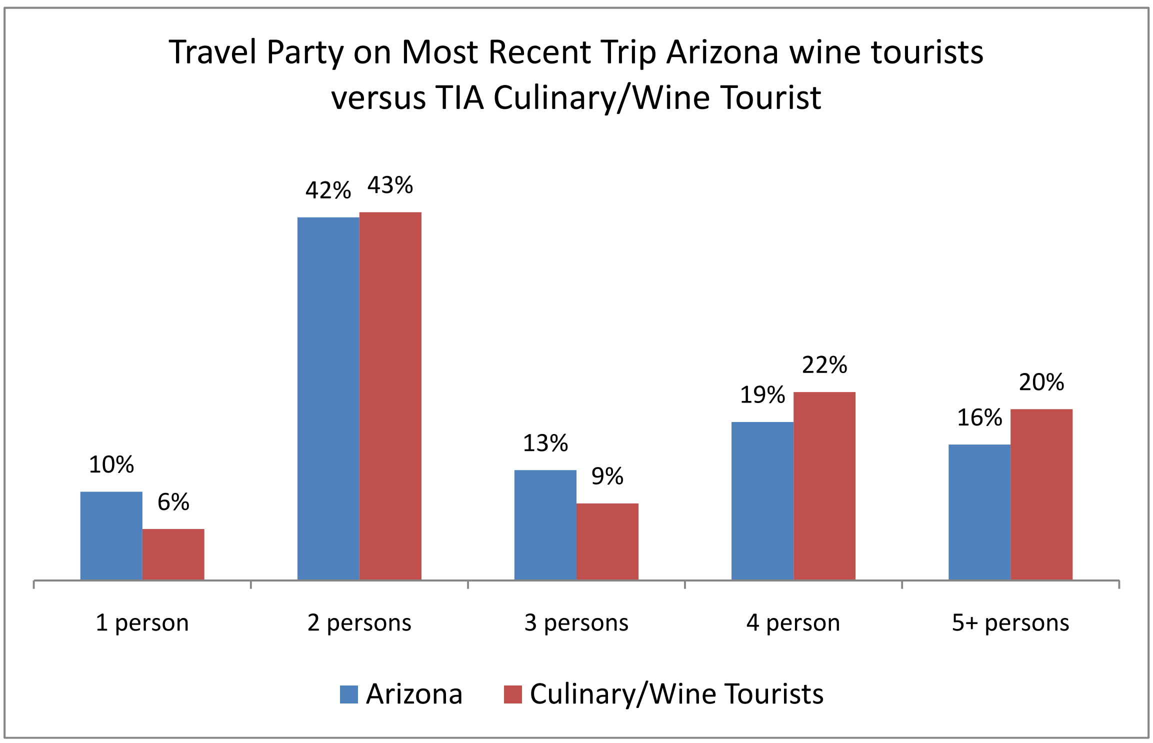
Figure 4.3. How Many Trips Taken in Last Three Years – Arizona versus TIA



Travel Party Size on Most Recent Trip

Few differences appeared in the size of travel parties between Arizona and TIA wine tourists. Two exceptions are in one person parties (10% in Arizona compared to 6% in TIA), and 3 person parties (13% in Arizona compared to 9% in TIA). However, in terms of large parties of five or more persons, the TIA study respondents constituted larger percentages (20% TIA compared to 16% in Arizona).

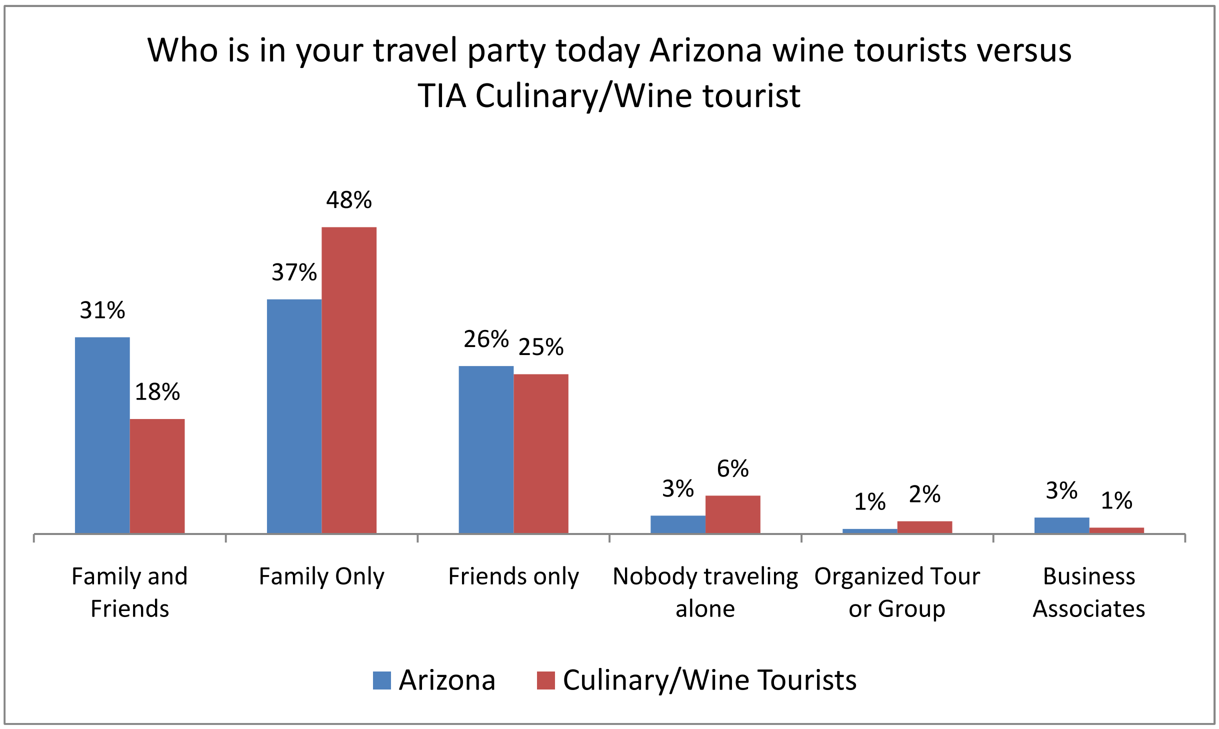
Figure 4.4. Travel Party Size on Most Recent Trip – Arizona versus TIA



Who is in your Travel Party

Arizona wine tourists traveled in parties of family and friends (31%) at a higher rate than TIA wine tourists (18%), while twice as many TIA wine tourists (6%) traveled alone compared to Arizona wine tourists (3%). The only other noticeable difference is that TIA wine visitors were more likely to travel as family only (48%) compared to Arizona wine tourists (37%).

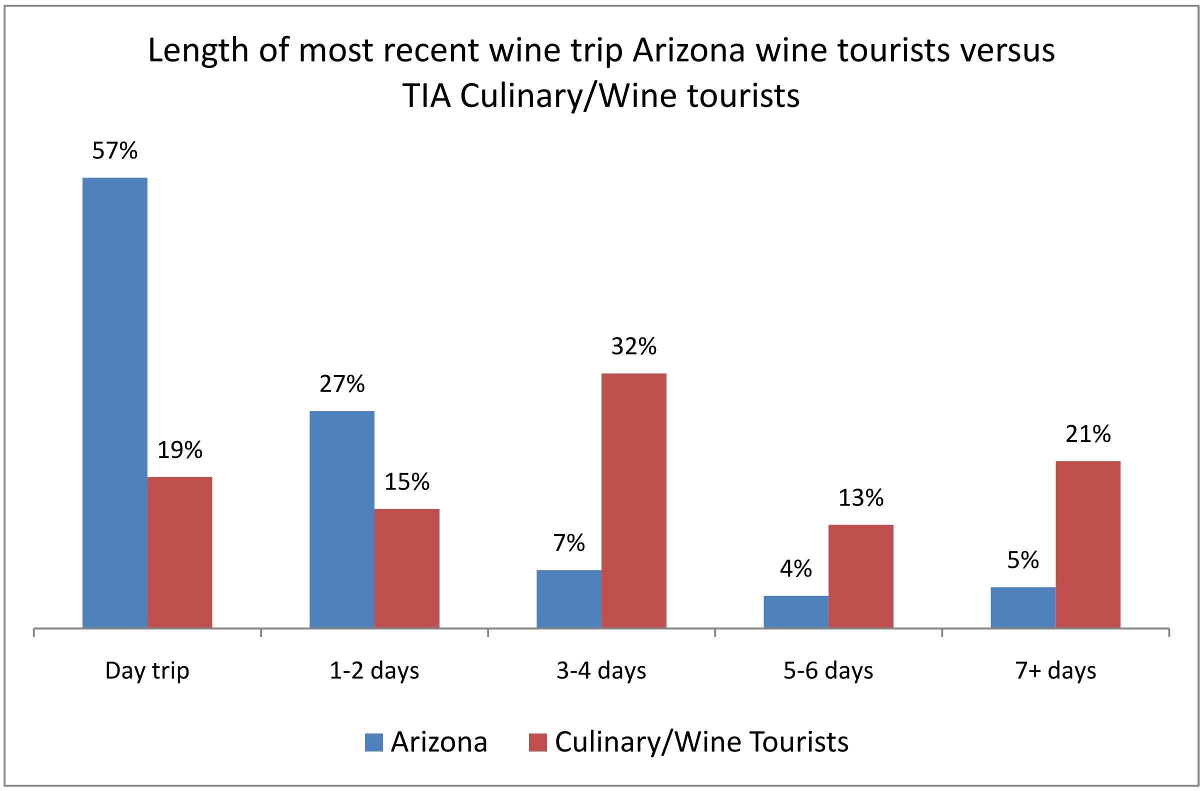
Figure 4.5. Who is in your travel party today – Arizona versus TIA



Length of Most Recent Wine Trip

Arizona wine tourists generally have shorter trips to wineries than the TIA wine visitors. Arizona visitors dominated in day trips (57%) and 1-2 day trips (27%), compared to TIA wine tourists who had many more parties taking long trips of several days or more.

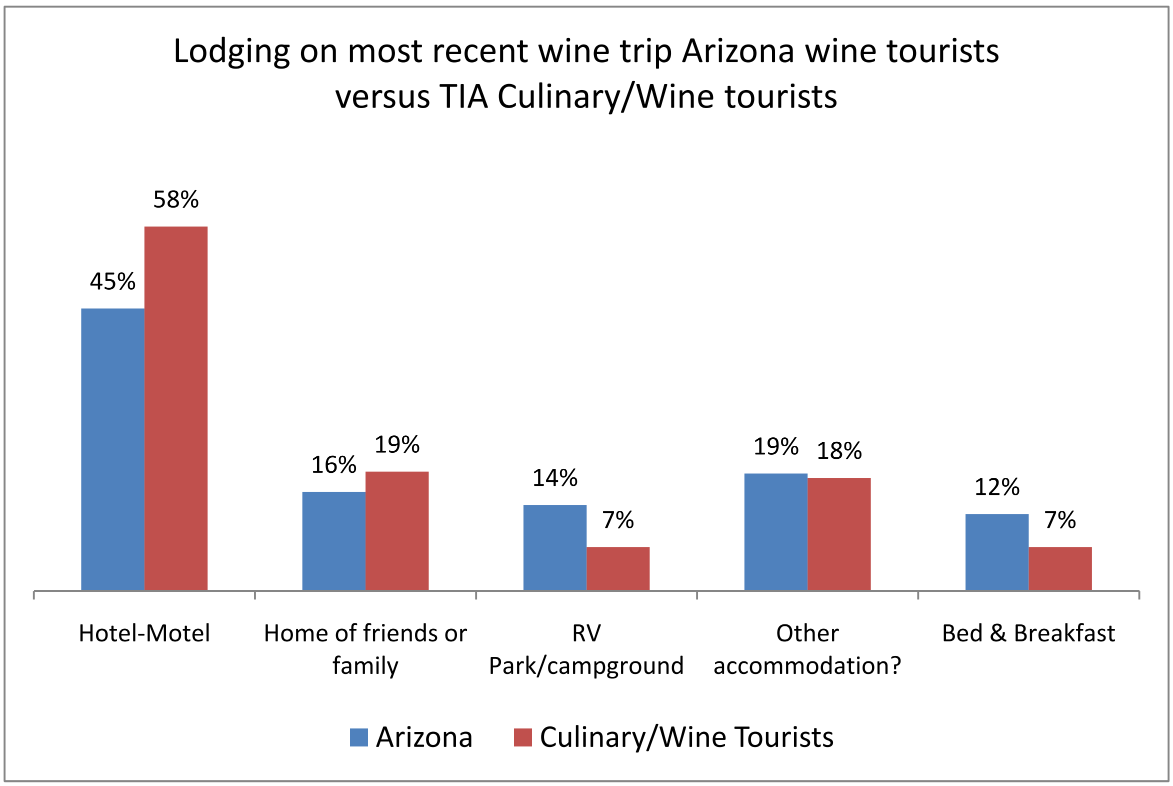
Figure 4.6. Length of most recent wine trip – Arizona versus TIA



Lodging on Most Recent Wine Trip

Arizona wine tourists tended to stay less in a hotel/motel/resort on their wine trips (45% compared to 58%), and with family and friends (16% compared to 19%) than did the TIA wine visitors. On the other hand, Arizona wine tourists were more likely to stay in RV Parks/Campgrounds (14% compared to 7%), Bed & Breakfasts (12% compared to 7%) and other accommodations than TIA wine travelers (19% compared to 18%).

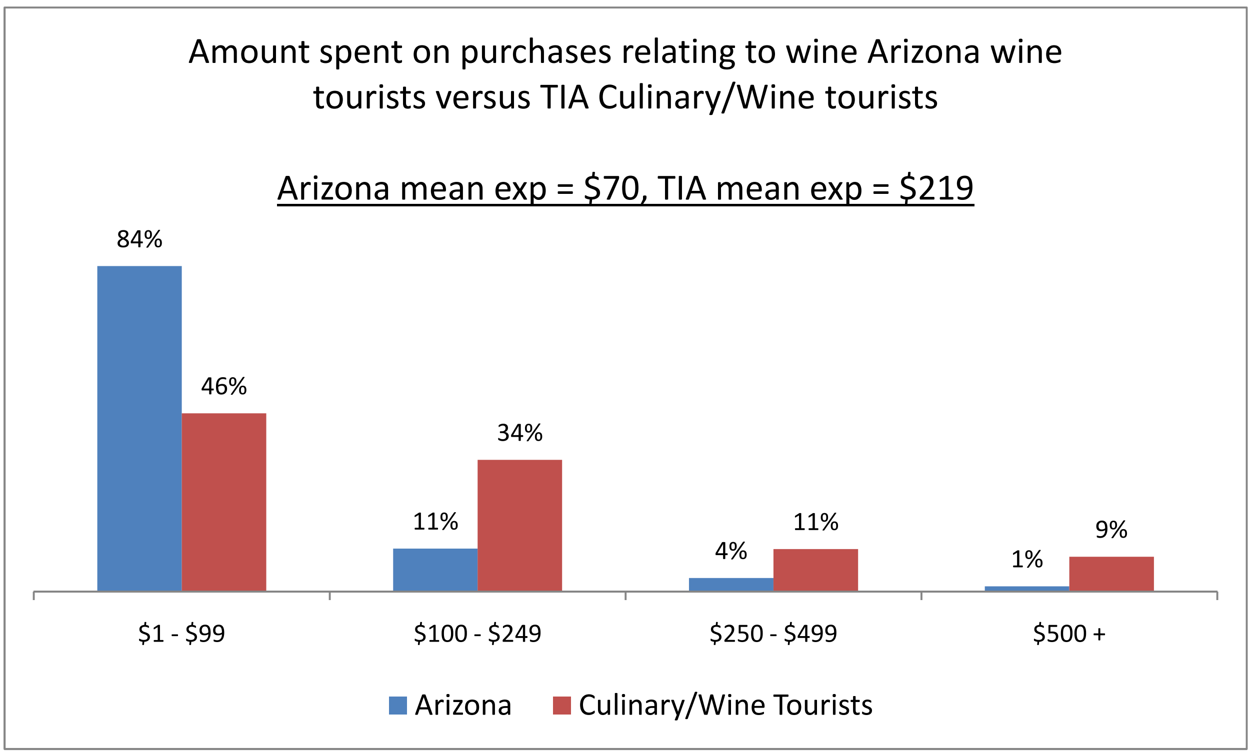
Figure 4.7. Lodging on most recent wine trip – Arizona versus TIA



Expenditures on Most Recent Wine Trip

Arizona wine tourists had considerably lower average expenditures on wine ($70) compared to the TIA wine visitors ($219). Arizona visitors had the greatest expenditures under $99 (84%), at rates nearly twice that of TIA wine tourists (46%). Arizona lagged the TIA groups in all the higher expenditure categories. The differences are compounded by the fact that 66 percent of all TIA travelers spent 3+ days on their trips compared to 16% of Arizona wine visitors. Longer trips tend to have higher expenditures in all categories including wine purchases.

Figure 4.8. Amount spent on purchases – Arizona versus TIA



Arizona Specific Questions in the TIA Culinary Tourism Survey 2006

The Arizona Office of Tourism purchased four questions that were included in the 2006 TIA Culinary Tourism survey, which specifically asked about Arizona culinary and wine opportunities. The first question asked respondents to indicate their level of agreement with the statement, "I am interested in Arizona as a travel destination because of its culinary offerings." The study defined culinary travel as: "Leisure travelers who engage in either or both food travel and wine travel." This question provides an understanding of the level of interest in Arizona as a culinary and wine destination.

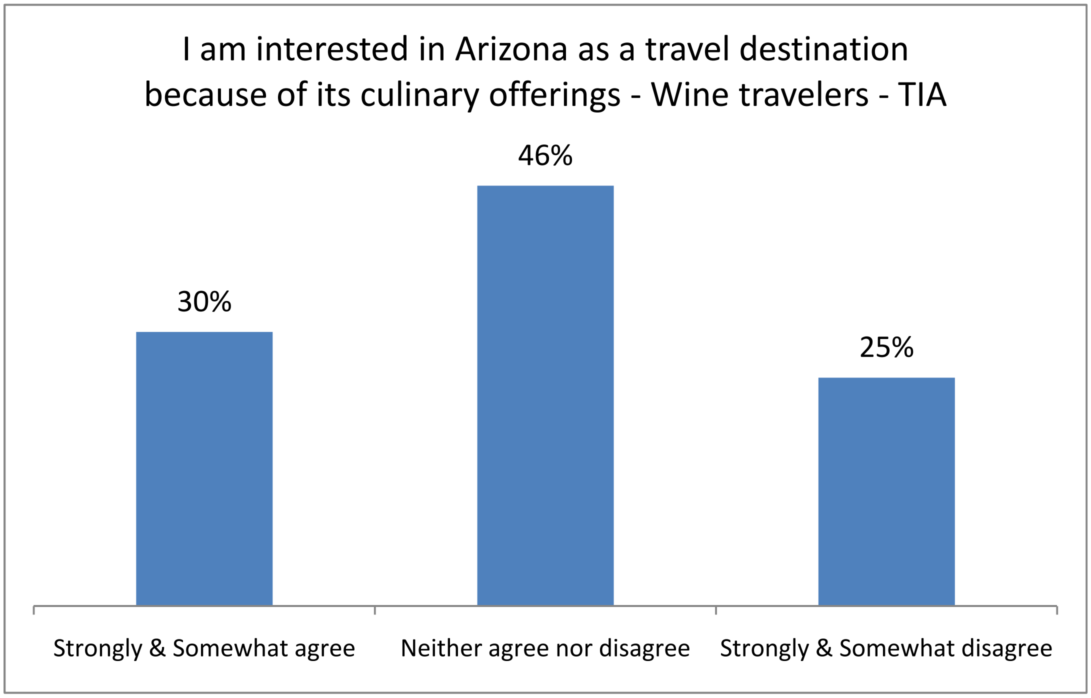
Interest in traveling to Arizona for culinary offerings

Apparently Arizona is not yet identified as a culinary destination, as the largest group of potential visitors (46%) neither agreed or disagreed that Arizona was a place of interest to culinary travel. However, if strongly agree and somewhat agree are combined, a significant 30 percent of the respondents are interested in visiting for this reason. See table 4.1. and Figure 4.9.

Table 4.2. I am interested in Arizona as a travel destination because of its culinary offerings.

	Wine Traveler
Strongly agree	6%
Somewhat agree	24%
Neither agree nor disagree	46%
Somewhat disagree	12%
Strongly disagree	13%

Figure 4.9. I am interested in Arizona as a travel destination because of its culinary offerings, combined responses?



How far would you be willing to travel for a unique dining experience?

The next question asked specifically how far respondents would be willing to travel for a unique dining experience. Unique is defined as ingredients, flavors or a cooking method specialized to Arizona. While this question may not directly apply to wine tourism it provides a yardstick of the willingness to travel, and since all wineries are located in rural Arizona, this is a valid question. Respondents were asked whether they would travel predetermined distances for a unique dining experience. The distances that residents are required to travel in Arizona are greater than in many parts of the U.S., therefore the responses here may reflect the willingness to travel in the state of origin.

All of Arizona's wineries and vineyards are located in rural areas, requiring considerable driving distances from metro areas. The wine regions, however, are relatively compact with several wineries located in close proximity to each other. The drive may be long to get there, but the wineries are usually clustered in a relatively small area. The southern wineries are located within 200 miles of the Phoenix metro and within 80 miles of Tucson. The Northern wineries are located within 100 miles of the Phoenix metro area and are potentially within driving distance of Tucson. Both regions therefore appear within the willingness to travel distances as shown in Table 4.2. Half (50%) were willing to drive less than 100 miles and half more than 100 miles or undecided.

Table 4.3. How far would you travel for a unique Arizona dining experience?

	Wine Traveler
< 25 miles	17.0%
25 - 49 miles	11.0%
50 - 99 miles	22.0%
100 - 149 miles	7.0%
150 - 199 miles	4.0%
200+ miles	18.0%
Not sure	21%

If you were to visit a winery, when would you most likely purchase wine?

The next question specifically asked about wine purchases. Respondents were asked if they visited a winery, at what point they would likely make a wine purchase. Choices for this question included: “During the visit,” “Following the visit,” “Both during and following the visit,” “Would not purchase wine as a result of visiting a winery,” and “Unlikely to visit a winery.”

The majority of respondents indicated that they would purchase wine during the trip (53%), and a further one-third (32.0%) indicated that they would purchase wine both during and following the visit. See Table 4.3.

Table 4.4. If you were to visit a winery, when would you most likely purchase wine?

	Wine Traveler
During the visit	53.0%
Following the visit	12.0%
Both during and following the visit	32.0%
Would not purchase wine as a result of visiting a winery	0.5%
Unlikely to visit a winery	1.5%

Decision Making Criteria for Visiting a Winery

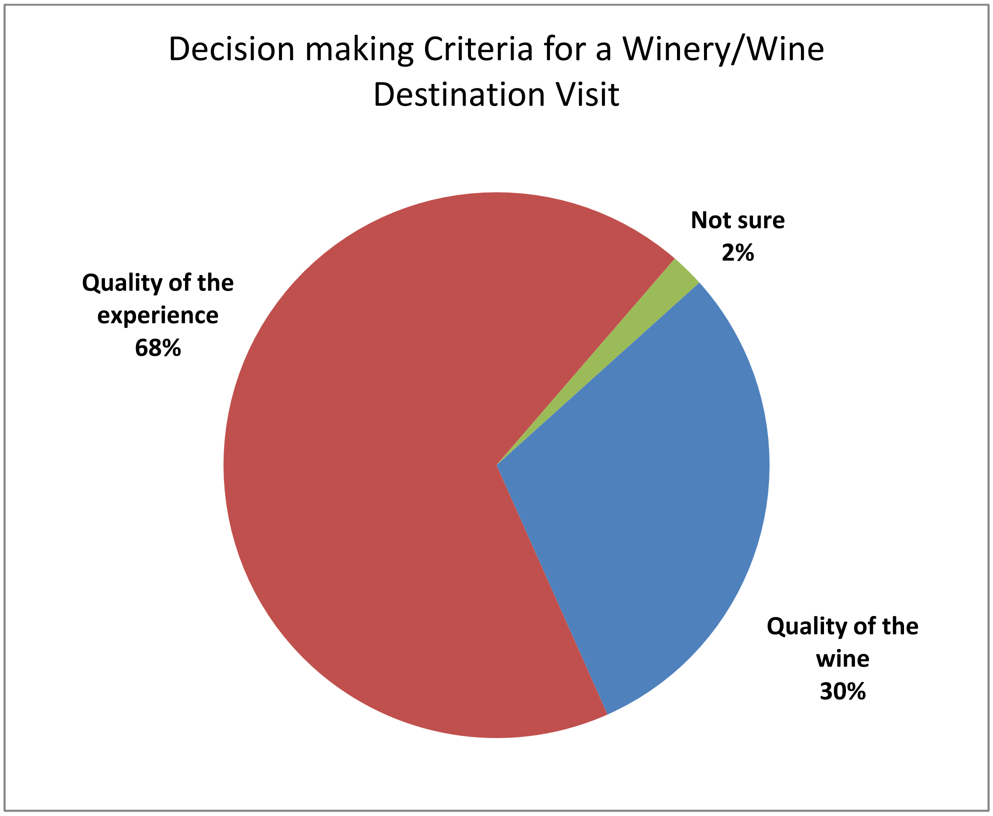
The final question asked respondents, if they visited a winery, which of four statements best described their decision making choices about winery visits. The choices included: "The quality of the wine has more influence on my decision to visit a winery/wine destination," "The entire experience (i.e. winery, quality of the wine, scenery, surrounding area, etc.) has more influence on my decision to visit a winery/destination," "Not sure," and "Unlikely to visit a winery."

The entire experience (68%) is more than twice as important as the quality of the wine (30%) in the decision making criteria for winery visits. The quality of the wine by itself was also important for one-third (30%) of respondents.

Table 4.5. Which statement best describes your decision making criteria when visiting a winery/wine destination?

	Wine Traveler
The quality of the wine has more influence on my decision to visit a winery/wine destination	30%
The entire experience (i.e. winery, quality of the wine, scenery, surrounding area, etc.) has more influence on my decision to visit a winery/destination	68%
Not sure	2%
Unlikely to visit a winery	0%

Figure 4.10. Decision making Criteria for a Winery/Wine Destination Visit



The comparisons between Arizona and the TIA wine tourists in the two studies are instructive for the Arizona wine industry. Arizona wine travel parties are comprised of more women and more middle-aged visitors, who take more day trips and fewer overnight or long (6+ day) trips. Arizona wine visitors travel more in family and friends only groups, stay more in B&B's and have lower average wine purchases than do those in the TIA wine study. Many in the TIA study were not necessarily aware of Arizona as a wine destination. It is also important that for many, the overall experience is often more important than the wine itself when deciding to visit wineries.

Conclusion

This study has shown that wine tourism is an important and growing niche tourism market in Arizona. The size of this niche market is somewhat difficult to gauge, however, the level of interest in wine tourism is high. A large number of visitors indicated that they had never been to an Arizona winery before, and an even larger number were first-time visitors at the winery where they received the survey. This bodes well for the wine tourism industry, as a majority of visitors are Arizona residents, mostly from Maricopa and Pima County, indicating large latent demand on the part of many old and new residents who have yet to be introduced to this new wine industry.

Thus, Arizona's wineries are growing and attracting more visitors to an industry that has seen steady growth over the last three decades, from a few wineries in the Sonoita area to 44 licensed and bonded wineries now located in three counties. Arizona wines have improved in quality, with many wineries concentrating on high quality products with relatively low volumes, products that can demand a premium price in the marketplace. Wineries will also benefit from the increasing interest in Arizona-grown and locally-grown foods, that are gaining momentum statewide. Winemaking is an environmentally sustainable practice that helps to preserve open space, rural communities and values in counties where agriculture has been in a process of decline. Wine consumption continues to increase across the country, with increasing interest on the part of younger generations. Arizona, like many other states, benefits from a wine tourism industry that attracts higher-income demographic groups infusing "new money" into rural economies. Wine consumers exemplify the experiential travelers who are interested in agricultural and culinary tourism and in having authentic experiences in rural Arizona.

Arizona wineries and therefore, wine tourists may face some challenges in the future. The most imminent challenge is the introduction of legislation in the Arizona House of Representatives to enforce on wineries a "three-tier" or alternative distribution system – from winery to wholesaler to retailer. The current system of direct-to-consumer sales allows smaller producers to sell directly to the consumer in stores or on the internet. If legislative efforts are successful, smaller producers will once again find it harder to compete with larger, more established producers. Agriculturally, grape growing is an industry with significant risks. In particular, natural risks such as frost, hailstorms, pests and disease outbreaks pose challenges for production goals. Finally, winemakers are often hampered by government regulations, zoning restrictions or taxes.

The study confirms what has been documented in other studies of leisure travel markets, that travelers desire unique experiences when away from home. Arizona's wineries offer these unique experiences. Thus, the state's wineries, vineyards and tasting rooms are a valuable tourism resource.

Appendix A:

Regional Economic Impacts of Arizona Wine Tourists

Economic Impact Introduction

Questions in the survey of Arizona winery visitors asked respondents to detail their regional expenditures in each of the following categories: lodging, food and beverage, transportation (including gas), shopping/jewelry/antique purchases, recreation/tour/entrance/permit fee, and miscellaneous other expenditures. Understanding the regional economic impacts of visitors can illustrate the economic importance of wine tourism in Yavapai, Santa Cruz and Cochise Counties where a majority of the wineries and tasting rooms are located.

Expenditures from the study were entered into the Input-Output model Impact analysis for PLANing (IMPLAN) and economic impacts and multiplier effects were calculated for Yavapai County, as well as Cochise and Santa Cruz counties combined. Economic impact analysis (EIA) measures the direct and extended effects of expenditures related to a tourist activity by detailing industry response and multiplier effects on many regional economic indicators such as output, income, and employment.

Economic Impact Analysis Methods

Input-Output (I-O) models are an important tool used in assessing the economic impacts of specific activities. The I-O model incorporates transaction tables to keep track of inter-industry sales and purchases, as well as exogenous sectors of final demand such as households, government, and foreign trade. The name, "I-O Model," is a result of each industrial sector in the model being both a buyer and a seller of inputs and outputs.

The I-O model can be used to conduct economic impact analysis. Economic impact analysis involves applying a final demand change to the economic I-O model, and then analyzing the resulting changes in the economy (IMPLAN Analysis Guide, 1999). Impacts can be one-time impacts, such as the construction of a new factory, or they can be recurring impacts, such as the arrival of a new industry. Often, the impact analysis is concerned with multiplier effects, or the amount of money that is re-circulated through the economy after an initial expenditure.

Visitors were asked to estimate daily trip expenditures in the categories listed above. The visitors are assumed to be concentrated in the three Arizona counties that have wineries. Visitors from outside of the region purchased regional lodging, food, transportation, entertainment, etc., and this importation of expenditures represents an influx of "new" expenditures to the region. This analysis does not include respondents who live in the three wine counties as they do not represent "new" output to the region because it is assumed that regional residents would have allocated those expenditures to industrial sectors within the county anyway.

Direct, indirect, and induced effects of visitor expenditures were calculated for the 3-county wine region. The direct effects of expenditures capture the amount of purchases made by participants in each industrial category. Commodity purchases contributing to direct effects need to be margined to effectively allocate economic impacts. For example, many commodities available in the wine counties were not necessarily manufactured within the county (e.g. gasoline, souvenirs, etc.). By margining commodities, producer and purchaser prices are separated. IMPLAN uses regional purchasing coefficients (RPCs) to estimate gross regional trade flows (gross exports and imports), and incorporates the RPCs into the allocation of direct effects attributable to the defined study area. A regional purchasing coefficient represents the proportion of the total demands for a given commodity that is supplied by the region to itself (IMPLAN Analysis Guide, 1999).

Indirect effects are a measure of economic activity in other industrial sectors that is spurred by the direct effects. For example, wine visitors provided an economic boost to local food/beverage and lodging sectors (a direct effect). These hotels and restaurants require a number of inputs from other industries such as utilities, bulk food and beverage ingredients, and equipment. Indirect effects are the increased economic activity in these other industrial sectors caused by additional hotel and restaurant patrons.

Induced effects are an estimate of increased economic activity resulting from wages and income attributed to the direct effects. Staying with the previous example, a portion of wages earned by workers in the food/beverage and lodging sectors are then locally re-spent in other industrial sectors. IMPLAN uses Personal Consumption Expenditures (PCEs) to model induced effects. PCEs provide estimates of consumer expenditures on goods and services by different income classes (IMPLAN Analysis Guide, 1999).

Regional Expenditure Results

For the economic analysis, each survey represents a travel party. Expenditure questions asked respondents to estimate their expenditures for the travel party, i.e., each survey comprised one group or party. To estimate the number of visitors to the Arizona wineries a series of population estimate was developed to use in expanding per-party expenditures to all potential visitors to the study area, Yavapai, Cochise and Santa Cruz counties. It is estimated that approximately 508,753 people visited the Arizona wineries in 2010-2011 (during the period of the survey). This estimate is derived from a prior survey of the Verde Valley wine visitors from the "Economic Contributions of Verde Valley Winemaking," from the

University of Arizona (2011), input from wineries, tasting rooms, and interviews with area tourism professionals. It is estimated that the northern winery visitors account for approximately 258,753 visitors of which 51.6 percent are day visitors, while southern wineries account for 250,000 visitors of which 75.5 percent are day visitors. This population estimate is likely to be an underestimate of visitation since not all wineries provided input to the visitor estimates. The researchers, however, prefer to err on the side of conservative population estimates. As discussed previously only out-of-region visitors are included in this analysis. Therefore, only these 508,573 out-of-region visitors are included in the economic impact analysis. The harmonic or trimmed mean was used for average expenditures in calculating economic impact. The trimmed mean avoids extremes at either end of a frequency distribution by effectively reducing the top and bottom 5 percent of the distribution and recalculating the mean. This reduces the extreme end of the range lessening the impact of those who had no expenses as well as those who had expenses that were considered unreasonable (i.e., $1,100 for lodging for one night).

Answers from non-local survey respondents were totaled for each expenditure category and were averaged to represent the mean expenditures for out-of-town visitors. Both day-visitors and overnight-visitor totals were calculated for each expenditure category and entered into the Input-Output model developed for the three county wine producing regions (Cochise, Santa Cruz and Yavapai counties). Visitor expenditures entered into IMPLAN's Impact Analysis require bridging from survey expenditure categories into IMPLAN industry sectors. Most survey expenditure categories link directly to IMPLAN industry sectors (e.g., "Grocery Store Purchases" directly corresponds with IMPLAN sector #405 "Food and Beverage Stores"). Only one survey expenditure category, "Transportation," was allocated to multiple IMPLAN industrial sectors. Because the "Transportation" survey question asked participants to include gas, oil, and auto expenses, the overall expenditures were allocated to sector #407 "Gasoline Stations" (85%) and to sector #483 "Automotive Repair and Maintenance" (15%).

Table 5.1, illustrates visitor expenditures by category and by region including both day and overnight visitors. Total expenditures listed in the last column were used for the subsequent economic impact analysis.

Table 5.1. Estimate of regional expenditures by Arizona wine visitors

Wine Tourist Expenditures	Northern (Yavapai County)			Southern (Cochise & Santa Cruz counties)			Overall
	Day	Overnight	Total	Day	Overnight	Total	Combined
Lodging-Camping	$0	$6,764,300	$6,764,300	$0	$1,415,700	$1,415,700	$8,180,000
Restaurant & Grocery	$1,930,400	$3,509,800	$5,440,300	$1,098,100	$885,000	$1,983,100	$7,423,400
Transportation including gas	$933,900	$2,053,600	$2,987,600	$343,200	$74,900	$418,200	$3,405,800
Shopping-jewelry-antiques	$556,800	$936,000	$1,492,800	$328,300	$63,700	$392,000	$1,884,800
Recreation-Tour-Entrance-Permit fees	$305,200	$235,300	$540,500	$35,300	$113,300	$148,600	$689,100
Other expenditures	$506,600	$415,100	$921,700	$49,400	$204,200	$253,700	$1,175,400
Total	$4,232,900	$13,914,100	$18,147,200	$1,854,300	$2,756,800	$4,611,300	$22,758,500

The estimates of regional expenditures for wine tourism are affected directly by the proportion of day and overnight visitors to the region as well as the amount of accommodation and general tourist services (restaurants, food and beverage services, etc.) available in the region. Day visitors have lower per-party expenditures since they do not have overnight accommodation in the region, while overnight visitors have a greater impact through lodging and generally higher food and beverage purchases directly related to overnight stays. The general level of available tourism resources in a region also has an impact on the overall economic impact. Yavapai County for example has a total of 1,242 accommodations and food service establishments in its wine growing region, while Santa Cruz County has a total of 106, and Cochise County has 33 establishments in the regions of the county where the wineries and tasting rooms are located.

Regional Economic Impact Analysis of Wine Tourists

The total number of out-of-region wine tourists to the three county study area (Cochise, Santa Cruz and Yavapai Counties) in the study period was 508,573 visitors. These visitors were responsible for some $22.8 million of expenditures in the counties of the study area with an average regional expenditure of $371 per-party, per-day for overnight visitors and $149, per-party, per-day for day visitors. Expenditures recorded for each industrial category were entered into IMPLAN's impact analysis.

Table 5.2 shows the direct, indirect, and induced effects of regional expenditures made by non-local visitors. Type SAM multipliers are presented for each of the economic impact categories. Type SAM multipliers are similar to Type III multipliers in that they represent the ratio of total effects to direct effects and include indirect and induced effects. They are also similar in incorporating employment-based Personal Consumption Expenditures (PCEs) to model overall induced effects. IMPLAN's Type SAM multipliers differ from traditional multipliers because IMPLAN uses all social accounting matrix information to generate a model that captures the inter-institutional transfers (IMPLAN Analysis Guide, 1999).

Table 5.2. Effects[1] and Multipliers of $22.8 million of Regional Expenditures by Wine Tourists in Arizona's three wine regions

	Direct Effect	Indirect Effect	Induced Effect	Type SAM Multipliers	Total Effect
Total Output	$22,758,800	$4,305,600	$10,563,900	1.7	$37,628,300
Total Employment (FTE jobs)	264.9	34.0	106.2	1.5	405.1
Total Labor Income[2]	$7,661,800	$1,368,400	$4,499,100	1.8	$13,529,300
Indirect Business Taxes[3]	$3,922,600	$499,300	$1,522,900		$5,944,800

[1]Effects are presented in 2011 dollars.
[2]Total labor includes employee compensation and proprietor income.
[3]Indirect business taxes include excise taxes, property taxes, fees, licenses, and sales tax paid by businesses.

If regional expenditures are substantial, increased tax revenues will be generated. These tax revenues can also be substantial, particularly in tourism and service-oriented industries, where additional tax collections occur. As seen in Table 5.2, visitors to the state's wine growing regions spurred an additional $5.9 million of tax revenue for the counties where they were located. Much of this money is re-invested into infrastructure and community needs that further support tourism and recreation industries. The majority of tax revenue coming from wine tourists is the result of sales taxes paid to restaurants, hotels, and retail stores. Other fee and excise taxes are common in sectors such as car rentals and lodging industries.

Economic Impact Conclusion

In the study period 2011, wine tourists in Arizona's wine growing regions injected significant output to businesses in these regional economies. Approximately $22.8 million of direct regional purchases were made by out-of-region visitors, contributing to a total economic output of $37.6 million to the counties in the study region. This economic activity supported some 405 full-time equivalent (FTE) jobs. The total economic impact of wine tourists to the state and the counties is therefore substantial, and contributes significantly to the greater regional economy.

Appendix B:

Wine Tourism Questionnaire

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Arizona Wine Tourism Survey

Dear visitor to this winery, vineyard, tasting room or wine related festival. We are pleased that you have come out to visit and experience Arizona's growing wine industry. We would like you to take about 10 minutes to complete this short questionnaire about your experience today. The information obtained from this survey will be used to help Arizona's wine industry improve its visitor services. All information gathered from this survey will be confidential and will only be reported in the aggregate.

Which winery are you visiting today?

Is this a:
- O Vineyard
- O Tasting Room (not at a vineyard)
- O Winery
- O Wine-related festival or event

How many times have you visited this site BEFORE today's visit?

Approximately how many Arizona wineries have you visited in the last 12 months?

Which of these Arizona Wineries/Vineyards or Tasting Rooms have you visited at any time?**(check all that apply)**

Southern Arizona
Sonoita/Elgin/Willcox

- O Callaghan Vineyards
- O Carlson Creek Winery
- O Charron Vineyards
- O Canelo Hills Winery
- O Colibri Vineyards
- O Coronado Vineyards
- O Dos Cabezas WineWorks
- O Keeling Schaefer Vineyards
- O Kief-Joshua Vineyard
- O Lawrence Dunham Vineyards
- O Lightning Ridge Cellars
- O Rancho Rossa Vineyards
- O Sonoita Vineyards
- O Village of Elgin/Four Monkeys
- O Wilhelm Family Vineyards

Northern Arizona
Verde Valley/Page Springs

- O Alcantara Vineyard and Winery
- O Arizona Stronghold Tasting Room
- O Art of Wine
- O Bitter Creek Winery
- O Caduceus Cellars & Merkin Vineyards
- O Frietas
- O Granite Creek Vineyards
- O Javelina Leap Vineyard
- O Jerome Winery
- O Juniper Well Ranch
- O Juniperwood Ranch Winery
- O Oak Creek Vineyards
- O Page Springs Cellar
- O Pillsbury Wine Company North
- O San Dominique Winery

Who is in your visitor party today?
- O Family and Friends
- O Friends Only
- O Organized Tour Group
- O Family Only
- O Nobody, traveling alone
- O Business Associates

How did you hear about this winery/vineyard/tasting room or festival? **(check all that apply)**
- O Newspaper articles
- O Social Media
- O Wine trail publications
- O Magazine articles
- O Brochures
- O Arizona Vines & Wines
- O Internet
- O Word-of-mouth
- O Arizona Office of Tourism materials
- O Restaurants
- O Concierge
- O Restaurant
- O Other

1

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Please help us understand your reasons for visiting Arizona wineries by indicating your level of agreement with the following statements:

Agreement Level:	Strongly Disagree	Disagree	Neither Agree Nor Disagrre	Agree	Stronly Agree
For me, visiting a winery means more than just drinking wine	O	O	O	O	O
Visiting wineries is an important part of who I am	O	O	O	O	O
I have a strong interest in wine	O	O	O	O	O
Wine is important to my lifestyle	O	O	O	O	O
Drinking wine gives me pleasure	O	O	O	O	O
It does not have to be a special occasion to enjoy wine	O	O	O	O	O

Which of the following would you say were the reason(s) for your visit to Arizona wineries/vineyards/tasting rooms?

Reason:	Most Definitely Not	Not a Reason	Neither	Somewhat of a Reason	Most Definitely a Reason
To taste wine	O	O	O	O	O
To buy wine	O	O	O	O	O
To have a day out	O	O	O	O	O
To socialize with friends or family	O	O	O	O	O
To learn about wine and wine making	O	O	O	O	O
To rest and relax	O	O	O	O	O
To go on a winery or wine cellar tour	O	O	O	O	O
To be able to talk to a vintner	O	O	O	O	O
To eat and drink wine at the winery	O	O	O	O	O
To be entertained	O	O	O	O	O
To enjoy the beauty of rural Arizona vineyards	O	O	O	O	O
To attend a wine-related festival or event	O	O	O	O	O
To visit a historical or cultural attraction in the area	O	O	O	O	O
To visit the wine route/trail (see all the vineyards)	O	O	O	O	O
To buy wine related gifts/souvenirs	O	O	O	O	O
To participate in outdoor recreation activities (hiking, mt biking etc)	O	O	O	O	O
To have a different Arizona experience	O	O	O	O	O
To experience Arizona agriculture	O	O	O	O	O

How was your overall experience at this particular winery/vineyard/tasting room or festival?

- O Much better than I expected
- O A little better than I expected
- O As I expected
- O A little worse than I expected
- O Much worse than I expected
- O I had no expectations

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Did you make any purchases at the winery/vineyard/tasting room today? O Yes O No

If you bought anything at this venue today please complete the questions below:

How many bottles of wine did you purchase?

How much did you spend on wine?

How much did you spend on food?

How much did you spend on merchandise?

How much time, in total, will you spend in this area? If a day trip only, how many hours:

If staying overnight, how many nights:

If staying overnight in the area, what type of lodging are you using?
Mark all that apply. **(Leave blank if not staying in the area)**

O Hotel/Motel O RV Park O Bed & Breakfast

O Home of Friends/Family O Campground O Other

If staying overnight, what community did you/will you stay in?

If a U.S. resident what is your 5-digit ZIP-CODE

If you are not from the U.S., please list your Country of Origin:

Please estimate as closely as possible the amount of money that your travel party is spending per DAY in the area for the following categories in U.S. dollars with NO decimal places. (Example 92 not 92.00). 9 2 **DO NOT include winery/vineyard/tasting room expenses here.**

First, please tell us the number of people these expenses cover.

Lodging/Camping $

Restaurant & Grocery $

Transportation (incl gas) $

Shopping/Jewelry/Antiques $

Recreation/Tour / Entrance /Permit fees $

Other .... $

Define Other:

What is your gender? O Female O Male In what year were you born? 19

Including yourself, how many people including yourself are in your travel party?

Total number of people: Number of: Women Men Children under 18

Which of the following categories best describes your annual household income?

O Less than $19,999 O $40,000 to $59,999 O $80,000 to $99,999 O $120,000 and above
O $20,000 to $39,999 O $60,000 to $79,999 O $100,000 to $119,999

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Please describe your experience at this venue in a few words?

Is there anything else you want to tell us about wine tourism in Arizona?

Thank You!

Appendix C

Open Ended Questions

How did you hear about this winery/vineyard/tasting room?

AMARA
BLOOD INTO WINE
BLOOD INTO WINE DOCUMENTARY
BLOOD INTO WINE VIDEO
CONCIERGE AT HOTEL
COREY TURNBULL
DRIVE BY (2)
DRIVE BY GPS
FAMILY (2)
FAMILY AND FRIENDS ARIZONA ARTS AND WINES TEMPE ARTS FESTIVAL PAGE SPRINGS CELLAR
FAMILY MEMBER
FAMILY MEMBER SON
FRIEND/FRIENDS (7)
FRIEND OF OWNERS SON
FRIEND TOLD ME
FRIENDLY WINE SHOP OWNER
FRIENDS LIVE CLOSE BY
GPS
HIGHWAY SIGNS
HYATT
I HAVE PURCHASED SEVERAL VARIETIES AT TOTAL WINES AND WHOLE FOODS
IN THE AREA
JAY BILETI
JEROME WINERY RECCOMENDED AND OTHER CUSTOMERS
LONELY PLANET GUIDE
MY MOM
OWNERS OF A WINE SHOIP IN TUCSON
PAGE SPRINGS (2)
PAGE SPRINGS TEMPE ARTS AND WINES
POCO DIABLO RESORT
PURCHASED WINE IN PHOENIX
RADISON
SAW IT ON THE STREET
SAW IT WHILE DINING IN COTTONWOOD
SAW THE WINEFEST SIGN AT FOOT OF AIRPORT ROAD
SCENE
SOUTHERN ARIZONA FAIR
TEMPE 4TH AVENUE WINE FAIR WILLCOX FAIR
TEMPE ARTS FESTIVAL

How did you hear about this winery/vineyard/tasting room? Continued

THE RIDGE IN SEDONA
TOOL FANS
TOUR
TOURIST MAP (2)
TUCSON HOTEL
VISITOR TO ALCANTERA GAVE US THE RECCOMENDATION
WALKING DOWN THE STREET WE SAW IT
WATER TO WINE TOUR LAST YEAR 2010
WINE BUYER FOR GOOD FOOD MARKET
WINE SHOP REFERAL
WINE SPECTATOR
WORD OF MOUTH GARMIN GPS

Other accommodation

AMARA
CABIN
CAR
CASITA
CONDO (2)
DIAMOND RESORTS SEDONA
FRIEND
FT.TUTHILL MILITARY RECREATION AREA
GUEST HOUSE
HOME
LOCAL
MY SISTER LIVES IN AZ
RESORT (5)
TIME SHARE (9)
TIME SHARE RENTAL
TIMESHARE RESORT (2)
TOMBSTONE
VACATION

Please describe your experience at this venue in a few words

4 GOOD AND PLEASANT EXPERIENCED PEOPLE AT THE WINERY IT DEFINITELY CONTRIBUTES TO THE WINE TASTING EXPERIENCE

5 STARS FOR SERVICE CHOICES VENUE EXPLANATIONS VIEW AND AMBIANCE NEEDS MUSIC MORE RETAIL OUTSIDE

A GREAT FIRST EXPERIENCE OF ARIZONA WINERIES RELAXED GROUNDS

A LEARNING EXPERIENCE

A NEW EXPERIENCE

A PLEASANT SURPRISE BETTER THAN HITTING THE TOURIST SHOPS

A PLEASANT TASTIN EXPERIENCE

A REAL VINEYARD

AESTHETICALLY PLEASING PLEASURE IN A GLASS

ALCANTARA IS BEAUTIFULL I LOVE IT SO MUCH MY FIANCE AND I HAVE PLANNED TO GET MARRIED HERE

ALWAYS EXCELLENT

AMAZING STAFF AMAZING WINES

ARIZONAS ONLY TRUE VINEYARD EXPERIENCE

ATMOSPHERE

A VERY NICE NEEDED MORE AIR FLOW UNDER THE TENT MORE FOOD OPTIONS

AWESOME (4)

AWESOME EXPERIENCE

AWESOME STATE GREAT

BEAT MY EXPECTATIONS

BEAUTIFUL AMAZING

BETWEEN BOTH PAGE SPRINGS AND ARIZONA STRONGHOLD BOTH PLACES ARE SO WELCOMING AND RELAXING THE STAFF IS ALWAYS SO FRIENDLY AND EDUCATIONAL THE WINES ARE EXCEPRIONALLY GOOD AND WE ARE THANKFUL THEY ARE BECOMING MORE AND MORE AVAILABLE IN PHOENIX

BEAUTIFUL INTERIOR FLAVORFUL WINES

CORE IS VERY PERSONABLE AND KNOWLEDGABLE FRIENDLY FUNNY TO BE AROUND WHILE TASTING ALL OF THE DELICIOUS WINE

COREY IS VERY PERSONABLE AZ STRONGHOLD WINES ARE QUITE GOOD

COREY MESMERIZED ME WITH HIS WISDOM AND SEXINESS

COREY WAS NICE

DANA IS GREAT

Please describe your experience at this venue in a few words-Continued

DELICIOUS AND FUN
DELIGHTFUL AND INVITING TO US BOTH
ENJOYED THE EXPERIENCE

ENJOYED THE WHOLE EXPERIENCE LIKE THE IDEA OF SITTING BY THE CREEK HAVING LUNCH WITH WINE

ENTHUSUASTIC
EXCELLENT (2)
EXCELLENT FRIENDLY AND VERY INFORMATIVE ALSO SANG AND WAS FLEXIBLE AND TOLERANT
EXCELLENT INTERESTING AND INFORMATIVE GOOD REPRESENTATION OF AZ WINES
EXCELLENT TASTING DEMO AND VERY FOIENDLY AND KNOWLEDGABLE PERSONELL
EXCELLENT VERY HOSPITABLE AND WELCOMING
EXHILIRATING RELAXING FRIENDLY ATMOSPHERE PERSONABLE
EXHILIRATING EXPERIENCE
FANTABULOUS
FRIENDLY

FRIENDLY HOSTS AND GUESTS EXCELLENT RED WINES NICE BLEND OF A PLACE TO TASTE WINE AND COME FOR A DRINK

FRIENDLY RELAXING PEACEFUL
FRIENDLY SERVICE KNOWLEDGABLE PEOPLE
FRIENDLY WINE STAFF
FULL OF FUN
FUN (4)
FUN AND ENTERTAINING
FUN DIFFERENT
FUN ENERGETIC GREAT SELECTION OF WINE AND ACCESORIES ART FRIENDLY STAFF
FUN ENJOYABLE
FUN FAMILIAL TYPE GATHERING
FUN GOOD WINE NICE PEOPLE
GREAT WINES GREAT SERVICE ATMOPSPHERE
GOOD EXPERIENCE NICE TASTING ROOM FOOD WINE GOOD
GOOD ATMOSPHERE A PLEASANT SURPRISE
GOOD EXPERIENCE GOOD WINE BEAUTIFUL SCENERY
GOOD EXPERIENCE NICE LAID BACK
GOOD TABLE STAFF
GREAT (4)

Please describe your experience at this venue in a few words-Continued

GREAT AWESOME KICK ASS

GREAT COPREY IS KNOWLEDGABLE AND FUN TASTING SHOULD BE FUN AND NOT A PRESENTATION LOVED IT

GREAT DID NOT EXPECT THIS IN ARIZONA
GREAT EXPERIENCE (2)
GREAT EXPERIENCE WE LOVE THE VINEYARD
GREAT EXPERIENCE WISH THERE WAS FOOD HELPFUL FRIENDLY COMFORTABLE
GREAT FUN
GREAT LOCATION KNOWLEDGABLE STAFF WINE IS GOOD ENJOYABLE EXPERIENCE WE WILL BE BACK
GREAT SERVICE GREAT WINE

GREAT SERVICE NICE ATMOSPHERE PLEASANT PLACE TO BE KNOWLEDGABLE INFORMATIVE ENJOYABLE

GREAT STAFF
GREAT WE LOVE SONOITA VINEYARDS GREAT PEOPLE DELICIOUS WINE NICE FESTIVALS
GREAT WINES MUCH MORE TO MY LIKING ECLECTIC ATMOSPHERE APPEALING
GREAT WINES VERY INFORMATIVE DESIREABLE ATMOSPHERE
GREAT WINES GREAT SCENERY
HIGHLY INFORMATIVE FUN AND INFORMAL VERY FRIENDLY AND HELPFUL

HIP AND LAID BACK FIRST WINE TASTING WE HAVE DONE WHERE THEY ENCOURAGE YOU TO PULL UP A CHAIR AND STAY A WHILE

HONESTLY HAD NO IDEA WE WOULD HAVE THIS MUCH FUN WE WERE TOLD IT WASNT WORTH IT BY MY MOM I SOOO DISAGREE WE ENJOYED EVERY SECOND OF ALL 4 VENUES WE VISITED

I AM NEW TO THE WINE EXPERIENCE AND THE STAFF WAS VERY KNOWLEDGABLE AND EXPLAINED EVERYTHING TO ME

I LOVE THIS WINERY
I LOVED IT KEVIN KNOWS HIS STUFF
INFORMATIVE NICE

INTERESTING WINE IN THE DESERT HAD A COUPLE OF GOOD REDS WE WILL BUY INTERESTING BLENDS

INTOXICATING INVIGORATING REFRESHING GREAT EXPERIENCE
IT IS VERY ENJOYABLE
ITS THE BEST IN THE AREA
KNOWLEDGABLE AND ATTENTIVE STAFF

Please describe your experience at this venue in a few words-Continued

KNOWLEDGABLE PLEASANT GUIDE SOME CRACKERS OR BREAD WOULD BE GOOD TO ADD WINE IS VERY GOOD

LAID BACK ATMOSPHERE VERY ENJOYABLE LIVE MUSIC WAS GOOD AN ADDED BONUS
LONG EXPLANATION
LOTS OF FUN PLEASANTLY SURPRISED
MOST RELAXING
NEAT FRIENDLY
NICE (2)
NICE ATMOSPHERE (2)
NICE EXPERIENCE BEAUTIFUL VINEYARD (2)
NICE RELAXING EXPERIENCE
NICE SOCIAL ATMOSPHERE INFORMATIVE
NICE VIEW GREAT TASTING TABLE
OUR FAVORITE FUN
PAUL AND COREY A FUN BUNCH
PLEASANT INFORMATIVE RELAXING ATMOSPHERE WINE WAS EXCELLENT
PLEASANT CHARMING KNOWLEGABLE STAFF EXCELLENT WINES

PLEASANTLY SURPRISED THE WINE FLIGHT WAS BOTH INETERESTING AND MORE COMPLEX THAN I ANTICIPATED

PLEASANTLY SURPRISED AND STAFF WAS EXTREMELY WELCOMING
QUIET PERSONAL FRIENDLY KNOWLEDGABLE
RECOMMENDED BY PAGE SPRINGS
RECOMMENDED BY ANOTHER WINERY
RELAXING (3)
RELAXING DEFINITELY A BREAK FROM THE ORDINARY
RELAXING PLEASENT FRIENDLY KNOWLEDGABLE STAFF
SO FAR SO GOOD FUN TASTING WANT TO DRINK MORE
TERRIFIC GREAT SETTING SERVICE STAFF AND VINTNER

TERRIFIC LINEUP OF WINES THIS CALAGHAN AND KEELING SCHAFER ARE MY FAVORITE ARIZONA WINERIES

TERRIFIC TASTING ROOM HOSTS IN COTTONWOOD MAKE IT AS MUCH FUN AS NAPA
THE GENTLEMAN WAS VERY FRIENDLY AND INFORMATIVE
THE STAFF'S WELL VERSED AND KNOWLEDGABLE ATMOSPHERE AND STAFF ARE FRIENDLY

THE WHOLE DAY HAS BEEN A GREAT SURPRISE EVERY PLACE I HAVE BEEN HAS BEEN DIFFERENT AND HAS BEEN HELPFUL IN UNDERSTANDING THE VINES IN THE REGION

Please describe your experience at this venue in a few words-Continued

THIS IS A PHENOMENAL VENUE YAY ARIZONA STRONGHOLD
TIME TO RELAX AND ENJOY
U EVERY RELAXED AND PROFESSIONAL SO BEAUTIFUL A REAL VINEYARD

VERONICA AND JB WERE SO FRIENDLY AND GREAT THEY PUT OTHER TASTING ROOMS TO SHAME HONESTLY

VERY ENJOYABLE (2)
VERY ENJOYABLE DANA WAS GREAT
VERY FREINDLY STAFF
VERY FRIENDLY AND INFORMATIVE (2)
VERY FRIENDLY AND PROVIDED A GREAT ATMOSPHERE (2)
VERY FRIENDLY INFORMATIVE AND EXCELLENT
VERY FRIENDLY STAFF
VERY FRIENDLY VERY TASTY
VERY FRIENDLY AND INFORMATIVE
VERY FUN AND FRIENDLY
VERY FUN TASTING ROOM EXPERIENCE AND CONGENIAL
VERY GOOD WINE VERY KNOWLEGABLE AND HELPFUL SERVER
VERY INFORMATIVE GOOD CUSTOMER SERVICE
VERY INVITING NICE PRESENTATION FRIENDLY
VERY LAID BACK AND RELAXING GREAT CUSTOMER SERVICE
VERY NICE (2)

VERY NICE JENIFER WAS WONDERFUL WINE COULD NOT HAE BEEN BETTER I WOULD SEND OTHER THIS WAY

VERY NICE COMFORTABLE GREAT FOR KIDS THEY HAD A VIDEO GAME
VERY NICE GREAT SERVICE
VERY NICE GREAT WINE OPEN PEOPLE

VERY NICE VERY GOOD INITIAL TASTE ON THE PALLET BUT NOT A LOT AFTER REALLY LOOK FORWARD TO TASTING YOUR WINE IN THE FUTURE WHEN YOUR GRAPES MATURE

VERY PLEASANT EXPERIENCE EVERY TIME I HAVE VISITED PILLSBURY WINE COMPANY EXTRAORDINARY

VERY PLEASANT ENJOYED THE CONVERSATION
VERY RELAXED AND ENJOYABLE WE ENJOYED THE WINES

VINCE ANIODIS IS A ROCK STAR WHAT A GREAT PRESENTATION TO GO ALONG WITH ONGOING WINE KNOWLEDGE

Please describe your experience at this venue in a few words-Continued

WAS VERY INFORMATIVE EASY TO TALK TO AND VERY WELCOMING

WE ENJOYED THE WATER TO WINE TOUR FOR A SECOND YEAR AND THE TASTING AT ALCANTARA WE HAD FUN

WE HAVE BEEN TO THREE OTHER WINERIES TODAY THIS IS THE BEST GROUNDS WINE SCENIC BEAUTY TABLES OUTSIDE STAFF

WE LIKED VINCE INFORMATIVE NICE AND MANLY

WINE NOVICE ENJOYED IT

WONDERFUL

WONDERFUL KNOWLEDGABLE STAFF

WONDERFUL ONE OF MY FAVORITES I WAS LOOKING FORWARD TO THIS VISIT AND IT EXCEEDED MY EXPECTATIONS

WONDERFUL REALLY LOVE IT REALLY NICE

Is there anything else you wanted to tell us about wine tourism in Arizona?

A LOT BETTER THAN I EXPECTED VERY FRIENDLY PEOPLE WHO KNOW THIEIR WINE
AZS BEST KEPT SECRET
BETTER MAP (2)
BETTER MAPS OF ALL THE LOCATIONS

CHEESE PAIRINGS WITH WINE TASTINGS WERE A NEW AND UNIQUE EXPERIENCE SOMETHING WE DO NOT EXPERIENCE AT OUR LOCAL WINERIES ON THE EAST COAST

DO MORE
ENJOYING IT
EVERYONE SHOULD TRY IT

EVERYONE WAS VERY ACCOMMODATING AND FRIENDLY LOVED OUR STAY AND WE WILL BE BACK SOON

EXCELLENT

FIND THAT WINERIES AND TASTING ROOMS ARE WELCOMING AND HOSTS ARE EAGER TO SHARE INFORMATION ABOUT ARIZONA WINE INDUSTRY THIS IS A GREAT PROMOTION FOR TOURISM IN THE STATE THIER ENTHUSIASM REFLECTS A POSITIVE IMAGE FOR THE STATE

FIRST STOP
GETTING BETTER ALL THE TIME
GLAD TO DISCOVER AZ WINE I DID NOT KNOW ABOUT IT BEFORE PLANNING THIS TRIP
GOING TO JEROME NEXT
GOOD WINE GETTING BETTER
GREAT EXPERIENCE DONT SEE ANYTHING ABOUT AZ WINE ADVERTIZING
GREAT SCENERY AND WINE
GREAT TOURIST OPPORTUNITY
GREAT EXPERIENCE
GROW MORE WINE IN ARIZONA
HAD A FUN TIME
HAMMOCKS WOULD BE PERFECT NEAR THE VINEYARD
HAVE BEEN CLOSELY ASSOCIATED WITH A VINEYARD IN SOUTHERN ARIZONA
HERE TO DISCOVER
I AM GLAD IT IS GROWING
I AM LOVING IT SO FAR GREAT LOCAL WINES
I AM TAKING VITICULTURE CLASSES AT YAVAPAI
I CANT WAIT TO GET MARRIED HERE
I HAD NO IDEA ARIZONA HAD SO MANY VINEYARDS OR THAT THEIR WINES WERE SO GOOD

I HOPE IT GETS A LOT OF MEDIA EXPOSURE AND WE ENCOURAGE ECONOMIC DEVELOPMENT FOR THIS INDUSTRY ANY WAY WE CAN

I LIKE THE AREA AND THE ATMOSPHERE COTTONWOOD

Is there anything else you wanted to tell us about wine tourism in Arizona? Continued

I LOOK FORWARD TO EXPLORING FURTHER NEXT TIME I AM HERE

I NEVER THOUGHT OF ARIZONA AS A WINE MAKING AREA I WAS PLEASANTLY SURPRISED
I WAS INTRIGUED THAT VINTNERS EXISTED IN ARIZONA NOT MANY IN WISCONSIN EITHER

I WAS UNAWARE OF ARIZONA WINES I AM FROM OREGON AND TEND TO THINK OF OREGON AND CALIFORNIA WINES

I WISH THERE WERE MORE FOOD CHOICES IN THE SONOITA ELGIN AREA
I WISH THERE WERE MORE RESTAURANTS

I WOULD LIKE TO SEE MORE MAIN STREAM ADVERTISING WE VIEW AZ WINE AS A KEPT SECRET DON'T JUST ADVERTISE IN WINE LOCAL RELATED MATERIAL AD IT INTO OTHER MATERRIAL UNLESS YOU WANT TO KEEP IT A SECRET

IF YOU WERE BORN AND RAISED HERE LIKE ME YET HAD NO IDEA WE HAD THIS WINE AGRICULTURE YOU WILL BE SO IMPRESSED

INITIAL VISIT TO ARIZONA WASN'T EXPECTING SUCH A GREAT WINE TASTING EXPERIENCE BUT PLEASANTLY SURPRISED

IT GETS BETTER EVERY YEAR
ITS A LOT OF FUN NICE WINES WE WILL DEFINITELY COME BACK
ITS ON THE WAY UP AND UP
JUST GETTING STARTED FROM FLAGSTAFF
KEEP IT COMMING
KEEP IT REAL
KEEP IT UP (2)

KEEP IT UP WE HAD NO IDEA WINE WAS GROWN ON ARIZONA HILLSIDES COMING FROM WISCONSIN WE WERE PLEASANTLY SURPRISED

KEEP PROMOTING IT
KEEP UP THE GOOD WORK
LIKE ARIZONA WINE
KEEP UP THE GREAT WORK
LONG EXPLANATION WIFE DIED
LOOK FORWARD TO THE FUTURE
LOOKING FORWARD TO A SUCCESSFUL INDUSTRY ALSO HOPE THE WATER CONTINUES
LOOSE THE QUESTIONNAIRE
LOVE THE WINE
LOVED THE WINERIES PLEASANTLY SURPRISED BY THE QUALITY OF WINES PRODUCED WE WILL BE BACK
MAPS
MUSIC ON THE DECK
NEED MORE INFORMATION AND SIGNAGE

Is there anything else you wanted to tell us about wine tourism in Arizona? Continued

NEED SIGNAGE ON THE HIGHWAY AND SEDONA
NEEDS MORE EXPOSURE AND LOCATIONS

NEEDS TO BE PROMOTED MORE
NICE AREA
NO
NOT WELL ADVERTISED OUTSIDE ARIZONA
NOT WELL KNOWN
ROADS NEED IMPROVING TO SOME WINERIES

SO EXCITED TO HAVE THIS OPPORTUNITY HERE IN AZ I LOVE THIS STATE AND WINE AND I AM VERY EXCITED THESE TWO HAVE MERGED

SO FAR SO GOOD GREAT COLLECTION OF WINERIES
SO GLAD TO SEE THE INDUSTRY GROWING AND TO HAVE THE OPPORTUNITY TO EXPERIENCE A BIT OF NAPA OR SONOMA IN OUR OWN BACKYARD

SUPPORT IT MORE
SURPRISED TO HAVE SUCH A GREAT VINEYARD IN THE DESERT GREAT HOSPITALITY
THIS WAS THE MOST KNOWLEDGABLE WE HAVE BEEN TO
VERY UNIQUE
W LOVE IT
WANT TO TRY THEM ALL

WAS NOT EXPECTING TO ENCOUNTER WINE EXPERIENCE WE GO TO HERALDSBURG REGULARLY THIS WAS A GREAT FIND TO HAVE WINE AFTER HIKING WE ENJOY WINE EVENTS

WAS TOTALLY UNKNOWN TO ME UNTIL WE VISITED AND SAW ARIZONA PROMO MAGAZINE HAVE NOW VISITED 12 OF 28 WINERIES AND VERY IMPRESSED

WE HAVE DONE LOTS OF WINERIES IN NAPA AND SONOMA ITS GREAT TO HAVE THIS IN ARIZONA
WE HAVE HAD AN EXCELLENT TIME EVERY WINE TASTING TRIP

WE LIKE THE UNPRETENTIOUS ATMOSPHERE OF AZ WINE TASTING VENUES WE WOULD LIKE TO SEE SOME NICE RESTAURANTS AND HOTELS CLOSE BY THAT WAY WE DON’T NEED TO DRIVE

WE LOVE COMING TO THE VINEYARDS IN SOUTHERN ARIZONA IT IS A GREAT DAY TRIP AND WE BRING FAMILY AND FRIENDS HERE FREQUENTLY THE WINERIES ARE FRIENDLY AND INFORMATIVE ABOUT THE WINE THE SPECIAL EVENTS THEY HOST ARE GREAT ALSO THE COMMUNITY HAS BENEFITED AND GROWN OVER THE YEARS AND WE ARE VERY PROUD OF IT

WE PLAN ON DOING A LOT MORE OF IT
WE WILL BE BACK
WE WILL MOVE TO ARIZONA IN THE WINTER WITH MORE VENUES LIKE PAGE SPRINGS
WINE TOURISM IN ARZIONA ROCKS

Is there anything else you wanted to tell us about wine tourism in Arizona? Continued

WINERIES IN ARIZONA HAVE COME SUCH A LONG WAY LOOKING FORWARD TO CONTINUED DEVELOPMENT

WONDERFUL PART OF THE COMMUNITY

WONDERFUL WINE COMMUNITIES THIS IS A VERY POPULAR TOUR
WOULD BE GREAT IF MORE PEOPLE KNEW ABOUT IT

YOU GUYS ARE THE BEST GREAT LOCATIONA AND ARIZONA SCENERY LOVE THE PATIO AREA GREAT SHADE AND VIEW ALONG WITH GREAT WINE AND EXCELLENT WINE STEWARDS

YOU SHOULD CONSIDER MORE COOPERATION REVIEW WINERIES FOR WINE TASTING PROMOTE EACH OTHERS WINE IN NTHE AREA

YOUR STATE IS AWESOME WITH WINES