WINE VISITOR RESEARCH

March, 2018
METHODOLOGY

The Fredericksburg CVB commissioned Core Research to determine the impact of winery visitors to the area. Two surveys were conducted:

• **Personal interviews**: Six professionals conducted interviews with 326 winery visitors at three retail locations:
  - Grape Creek: 152
  - 4.0 Cellars: 128
  - Pedernales: 46

• **Online**: Two invitations were sent in enewsletters which produced 74 responses:
  - The Texas Hill Country Wineries included an invitation to the online survey in their November 8th enewsletter.
  - On November 29th, the Fredericksburg CVB enewsletter included a survey invitation.

The two surveys provide a consistent profile of wine visitors. Differences between the surveys provide direction for marketing strategies.
Have you visited wineries along Wine Road 290 east of Fredericksburg in the last year? Answer a few questions about your wine country experience for a chance to return for a two night stay in Fredericksburg. One prize will be awarded with a minimum value of $500.
## Visitor Profile

<table>
<thead>
<tr>
<th></th>
<th>Personal Interviews</th>
<th>Online survey</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Total</strong></td>
<td>326</td>
<td>74</td>
</tr>
<tr>
<td><strong>Number in party</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1-2</td>
<td>47%</td>
<td>62%</td>
</tr>
<tr>
<td>3-5</td>
<td>33%</td>
<td>29%</td>
</tr>
<tr>
<td>6+</td>
<td>21%</td>
<td>9%</td>
</tr>
<tr>
<td><strong>Age group</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Under 35</td>
<td>33%</td>
<td>11%</td>
</tr>
<tr>
<td>35-49</td>
<td>31%</td>
<td>13%</td>
</tr>
<tr>
<td>50+</td>
<td>37%</td>
<td>75%</td>
</tr>
</tbody>
</table>
WINE VISITOR RESIDENCE: personal interviews

- Houston: 23%
- San Antonio: 23%
- Austin: 17%
- DFW: 13%
- Other Texas: 15%
- Local: 3%
- Out of state: 6%

Winery visitor interviews  N=326
WINE VISITOR
LENGTH OF STAY

Day Trip
33%

Overnight
67%

Winery visitor interviews  N=326
WINE VISITOR LENGTH OF STAY & AVERAGE PURCHASE

Day Trip 33%
Average total purchase: $486

Overnight 67%
Average total purchase: $1,228

Winery visitor interviews  N=326
PURCHASE PLANS
Overnight vs. Day Trip

- Overnight:
  - Lodging, Dining: $147
  - Wine: $233
  - Shopping: $125
  - Total: $330

- Day Trip:
  - Lodging, Dining: $214
  - Wine: $125
  - Shopping: $125
  - Total: $665
PLAN TO VISIT DOWNTOWN
BY GROUP SIZE (overall=80%)
WHERE DINING

Interviews vs. Online survey

<table>
<thead>
<tr>
<th>Location</th>
<th>Interviews</th>
<th>Online</th>
</tr>
</thead>
<tbody>
<tr>
<td>Downtown</td>
<td>91%</td>
<td>86%</td>
</tr>
<tr>
<td>at winery</td>
<td>14%</td>
<td>11%</td>
</tr>
<tr>
<td>Hye</td>
<td>2%</td>
<td>9%</td>
</tr>
<tr>
<td>Johnson City</td>
<td>2%</td>
<td>17%</td>
</tr>
</tbody>
</table>
METHOD OF TRANSPORTATION
Interviews vs. Online survey

- **Own vehicle**: 79% Interviews, 94% Online
- **Wine shuttle**: 13% Interviews, 5% Online
- **Wine tour**: 8% Interviews, 3% Online
WINERY VISIT FREQUENCY

- never: 8% online, 0% interviews
- once: 15% online, 18% interviews
- once/year: 13% online, 22% interviews
- twice/year: 17% online, 20% interviews
- 3-4/year: 36% online, 25% interviews
- monthly+: 9% online, 18% interviews
- not sure: 3% online, 1% interviews
OVERALL EVALUATION
of Texas Wine Country Experience

Online:
- 70% A
- 23% B
- 6% C
- 1% D/F

Interviews:
- 75% A
- 22% B
- 3% C
- 0% D/F
ACTION ITEMS: WINERIES

Overall, winery visitors are pleased with their experiences:

“it’s wonderful as is” “it’s the new Napa.” “Maintain your great hospitality and lovely town.”

However, some are concerned that as the area continues to grow it will be less appealing, while others suggest the opposite “Don’t Dallas my Fredericksburg!”

Some suggestions for improvement include:

• **Manage visitors**

  “We don't go there to shop or dine, especially on weekends, as it's overrun with tourists. Would never do a 'wine tour' either. I suggest you find a way to not let the arrival of a 'wine tour' ruin the experience of others who have driven out to enjoy wine on their own!”

• **Tour packages and amenities**

  “…it would be nice to have an affordable, lodging/winery tours package.”

  “Compared to other wine regions, tasting fees are much higher than those of such areas as Sonoma, Amador, Lodi or even parts of Napa. Given the product and the need to always grow the Hill Country visitation and purchase of the product, I feel tasting fees should be in the $5.00 to $10.00 range at most, possibly no more than $8.00.”

  “More locations to pick up the wine passport. Some wineries in the past would include the actual glasses with the tasting. That was not the case this year.”
ACTION ITEMS: DESTINATION

Overall, visitors to the Texas Hill Country wineries give us high marks. When we asked for recommendations, these were the primary themes:

• **Hours open:** Winery visitors will appreciate morning brunches to start their day off before going to the wineries, as well as more retail available at the end of the day.
  
  “Shops need to stay open later and not close early. 6pm early for weekend especially Friday. Get away weekend very year; Sunday morning nothing open until noon.”
  
  “Places staying open later. By 7pm shops close, dinner hard to get, bar closed at 9pm”
  
  “Shopping sucks because everything closes at 5 or 6. Great place for weekend getaway, but can't do both in one day.”

• **Planning for increased traffic issues** is crucial.
  
  “The only inconvenience is all the 18 wheelers going through town that are intimidating and loud. Main Street shouldn't be a truck route.”
  
  “I love everything about Fredericksburg. One thing that could be improved is parking downtown...”

• **Lodging availability and pricing** – one in four visitors said that they either had difficulty finding accommodations or that the prices were too high:
  
  “If it was a little bit cheaper we would spend every weekend out here…”
  
  “We would stay more times if there were more places to stay. Because it gets so crowded on weekends.”