

Tourism Walla Walla

Insight for 2011 (and beyond) based on research in Q4 2010.



The purpose:

- After five years successfully growing Walla Walla's general awareness and achieving consistent increases in visitor counts, TWW deemed it appropriate to benchmark our position.



- To gain a better understanding of how the market currently perceives Walla Walla in our two dominant feeder markets (Seattle and Portland).
- Assess and determine future messages and marketing strategies in 2011 (and beyond).

What brings first timers?

- According to stakeholders:
 - Wine, great downtown, food, history and variety of places to stay.
 - To drop kids off at/investigate Whitman.
 - Conferences/business.
 - To visit family.

What brings them back?

- To replenish their “wine cellar.”
- The authentic spirit of the town (slower pace, friendly, intimate).
- Also: ability to meet local winemakers, chefs and locals at coffee shops (things that don't happen in the big city).

What's surprising?

- So many are “living their dream.”
- The sheer number of wineries.
- The culture/sophisticated people.
- The natural beauty.
- Quality of activities (music, sports).

What's disappointing?

- Getting here. (Long drive.)
- Limited flights, poor rental availability.
- Activities are in short supply (compared to larger markets).
- Not much for kids to do.
- Casual service can be misunderstood.

What do we want visitors to come away with?

- Stakeholders want positive experiences.
- A chance to meet wine maker/inn keeper.
- Sense the spirit of a friendly community.
- Impressed with quality of wine, produce and overall dining experience.

The ideal visitor:

- Drinks wine.
- Large disposable income.
- Empty nester.
- In their 50s.
- Appreciate art/culture.
- Have social network back home.
- Stakeholders want all to feel welcome.



Secondary target:

- In their 30s.
- Disposable income.
- No kids.
- Working professionals.
- Interest in wine.



Screenener criteria:

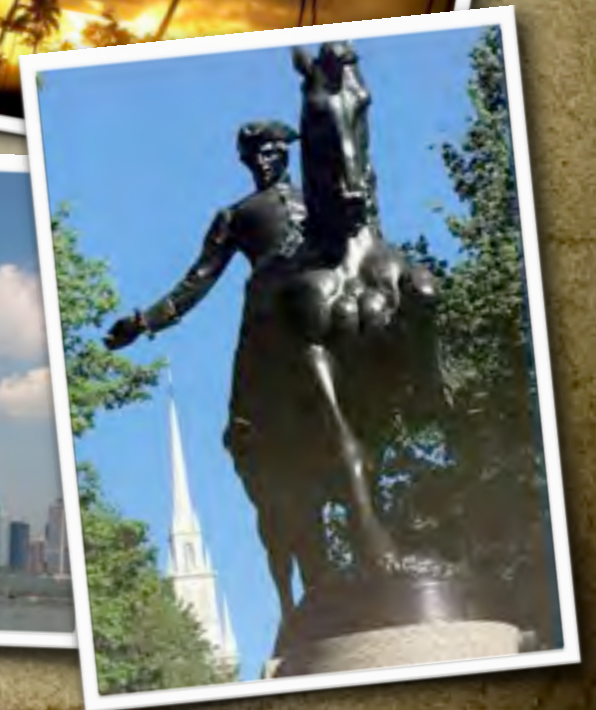
- How the respondents were chosen:
 - Age: 35-60
 - Household income greater than \$75k.
 - Minimum 2 weekend vacations in 2 yrs.
 - Minimum 1 extended vacation in last year.
 - Equal mix of men and women.
 - No focus group participation in 12 mos.

Recruiting process:

- Three sources to draw participants:
 - Businesses near focus group facilities in each city.
 - Two databases of potential candidates in each city.
 - Use of selected social media vehicles.

Where would they go for the ideal week-long trip?

- Hawaii (sun/beach)
- New York (activities)
- Boston (activities)



Conclusion:

- They're not coming to Walla Walla for a week-long getaway.

**What places
have they visited
in the region?**



SEATTLE GROUP:

- Ocean Shores (5 mentions)
- Port Townsend (4)
- Bellingham (4)
- Whidbey Island (3)
- Leavenworth (3)
- Lake Chelan (3)
- Walla Walla (2)

PORTLAND GROUP:

- Seattle (14 mentions)
- Oregon Coast (7)
- Vancouver, BC (5)
- Victoria, BC (4)
- Bend (4)
- Seaside (3)

Conclusions:

- A good deal of opportunity still exists in both Portland and Seattle.
- General public is not coming apart from wine-related activities.

Where they'd like to go for a weekend trip:

- Vancouver - 9
- Walla Walla - 8
- San Juans - 7
- Crater Lake - 4
- Leavenworth - 4
- British Columbia - 3
- Victoria - 3
- Spokane - 3
- Bellingham - 3

- Walla Walla = top mention in Seattle (32%).
- Walla Walla = second highest ranking between both markets.



Conclusions:

- SEATTLE: People have awareness, but they need more of an incentive.
- PORTLAND: Limited awareness, still plenty of opportunity.

Top concerns when planning a weekend:

- First: 35% ranked travel time number one; participants were willing to travel 3-4 hours (predominantly by car).
- Second: expectation of restaurants, nice accommodations, something to do.

Conclusion:

- We can't shorten the travel time, so we need to communicate it's worth the trip.

Top-of-mind when hearing Walla Walla:

- SEATTLE: Wine (68%), onions (21%) and old-town charm.
- PORTLAND: Onions (50%), wine (22%).
- BOTH: Wine, onions, small town feel, college town, good weather.

Conclusion:

- Five years ago, Seattle thought “onions,” now they think “wine” (46%).
- In Portland, the wine message can be strengthened.
- In both markets, we should promote a “premiere food and wine destination with a college town vibe.”

Areas for improvement:

- People from Portland were unsure where Walla Walla is located or how to get there.
- Some from both cities didn't know how big it was, the geography or what activities exist other than wine.
- All participants expressed interest in learning more; their curiosity was piqued.

Most appealing attributes:



Seattle:

- PRIMARY:
 - Outdoor activities
 - Wine
 - History
- SECONDARY:
 - Wine/outdoor activities/events
 - History/dining



Portland:

- PRIMARY:
 - Wine, events/festivals, outdoor activities.
- SECONDARY:
 - Dining, wine, good climate, events/festivals.



Combined:

- Tied for most appealing attributes:
 - Wine
 - Outdoor activities



Conclusion:

- People are coming for the wine, but they want something to do while in town (events/festivals/outdoor).
- And they expect good food.

Wine:

- Continue to leverage/lead with.
- It resonates with wine lovers AND has the ability to generate interest among non-wine lovers as well.
- Findings indicate many wine lovers still don't know about our wine industry.

College town:

- Sophisticated, small town can be an effective tool in reaching visitors.
- Findings show large number who would like to visit a small town like Walla Walla.
- “College town” implies sophistication as well as activities/things to do.

Food:

- Leverage combination of wine and locally grown crops to create fine food.
- Tap into “foodie” mindset; good food, locally grown and prepared.



Vintage, authentic:

- Walla Walla has a distinct personality; offers a range of unique experiences.
- Relaxed atmosphere lowers blood pressure of those who visit.
- Genuine experience, not a facade; what you see is what you get.

Now what?

How this effects our creative messaging going forward:

The creative roadmap:



(1) Who are we talking to?

- PRIMARY: Wine enthusiast, age 50-64, empty nester, high income.
- SECONDARY: Young professional, age 25-34, no kids, enjoys wine and the outdoors.



(2) What do they think?

“The Northwest is full of great places to visit. Walla Walla is intriguing, but it’s kind of a long drive. I don’t know if it’s worth the trek.”

Other options:



San Juans



Leavenworth



Vancouver, B.C.

(3) What do want them to think?

“A sunny college town set amidst the backdrop of wine country?”

“I’d drive 4+ hours for that, as long as there are enough good restaurants and authenticity to make it enjoyable.”

Each place has a downside:



Long ferry lines



Rainy; fake/facade



Border crossing

(4) What's the one message to lead with?

Walla Walla is a college town in the middle of sunny Washington Wine Country.

Don't abandon wine strategy.
Pair wine with secondary messages:

- Wine + college town
- Wine + great food (natural, local/onions)
- Wine + vintage, authentic



**(5) What are the
secondary,
support points?**

Walla Walla is home to Whitman; it's a bona fide college town:

- Educated community
- Coffee shops
- Laid back, but authentic downtown
- Not a bunch of hicks



Walla Walla is known for its onions.

- Appeal to foodies
- Leverage locally-grown movement



300 days of sunshine.



Define “outdoor activities” generically:

- Beautiful scenery/rolling hills.
- Can't compete with Lake Chelan, Bend, Leavenworth, etc. on this front.



Downtown isn't fake or a facade
(like Leavenworth or Poulsbo).

It's genuine.



(6) What's the proper tone?

Educated, likable and genuine with a touch of smart/dry humor.

(7) What's the call-to-action?

Continue to drive everything to the web.



**So where do we focus our
energy going forward?**

Fine-tune message to match medium:

- Wine + food to targeted pubs and online portals.
- Wine + college message to broader population (young and old) using broadcast and online.



Next steps:

- Approval of creative brief.
- Development of media plan.
- Development of creative.
- Implementation.

Thanks.
(That's all folks.)

