McMinnville Visitor Survey
Summer/Fall 2016 Final Results

November 2016

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Visit McMinnville

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INTRODUCTION / METHODOLOGY

This report presents the final results of a visitor intercept survey conducted for Visit McMinnville by RRC Associates of Boulder, Colorado during the summer/fall of 2016. The summer/fall visitor intercept survey was conducted at a variety of locations throughout McMinnville and is based on 665 completed interviews with visitors to the area over the summer and fall. The summer/fall visitor research was the first of its kind conducted in McMinnville and will serve to provide a reliable baseline of data available for tracking of the visitor profile year after year. Survey results generated from the 2016 sample of respondents interviewed have a margin of error of approximately +/- 3.8 percentage points calculated for questions at 50% response[1].

We direct the reader to a copy of the survey form, included in the Appendix A section of the report, as a reference to all questions addressed in the intercept survey this past summer/fall. Open-ended comments from the survey, including visitor comments and suggestions, are included in the Appendix B section. Tables showing detailed survey results for the visitor intercept survey by a number of different segmentations are provided in Appendix C.

[1] For the total sample size of 665 respondents interviewed during the summer/fall of 2016, margin of error is +/- 3.8 percent calculated for questions at 50% response (if the response for a particular question is "50%"—the standard way to generalize margin of error is to state the larger margin, which occurs for responses at 50%). Note that the margin of error is different for every single question response on the survey depending on the resultant sample sizes, proportion of responses, and number of answer categories for each question. Comparison of differences in the data between various market segments and from year to year, therefore, should take into consideration these factors. As a general comment, it is sometimes more appropriate to focus attention on the general trends and patterns in the data rather than on the individual percentages.

EXECUTIVE SUMMARY

Key findings from the McMinnville Visitor Survey are summarized below:

- **Occupancy, ADR, and RevPAR Improving**. Lodging data generally indicate an upward trajectory in occupancy, ADR, and RevPAR over the last 12 to 18 months, with growth noted in almost every month. However, occupancy in some summer months this year was either unchanged from 2015 or off slightly. While occupancy numbers are very strong overall, some of the fluctuations may be a result of increases in ADR possibly putting pressure on occupancies somewhat. Or, tight occupancies in traditional commercial hotel/motel properties (essentially maxed-out in some key summer months) and increasing ADR's might possibly be pushing people to other shared accommodations options in the area, more staying outside of McMinnville in neighboring communities, and/or there could be an increasing number of day trips to the area (with some foregoing an overnight trip). Research in future years will attempt to further uncover and explain some of these bigger picture patterns and trends in visitor travel behaviors, although the overall general upward trends reflect increasingly strong visitation to the McMinnville area.
- **Key Markets**. Largest markets are Oregon (37%), Washington (14%), and California (13%). Canada (4%), Texas (3%), Colorado, Florida, Arizona, Illinois, and Australia (each about 2 percent) are also strong.
- **Strong International Visits**. McMinnville has a strong international presence at 8%, led by Canada and Australia, as noted.
- **Day vs. Overnight Visits**. McMinnville skews slightly more day visitors than overnight (58% vs. 39%). Seasonal residents/second homeowners account for 2%.
- **Demographics: Older, Affluent Profile**. The profile generally skews older and relatively affluent with half having incomes over $100,000 (50%) and nearly 20% incomes over $200,000 (average income is approximately $143,000). Average age is 55. Average travel party size is 2.5 people, with most traveling with their spouse/partner (53%) or families/children (30%).
- **First-Time vs. Repeat Visitors**. McMinnville is characterized by a relatively high level of first-time visitors (42%), while 58% are repeat customers. As the destination grows and matures and becomes more well-known, we would expect the number of repeat visitors to increase in future years.
- **Length of Stay and Accommodations**. Average length of stay among overnight visitors is 3.4 nights, with more than half staying in a hotel/motel (53%), 21% with family/friends in the area, 13% RV or tent camping, and 8% B&B. Average rate paid was $127 per night, with three-quarters of accommodations located in the McMinnville area.
- **Main Purpose of Visit**. Leisure and sightseeing was the top purpose for visiting by far (38%), followed by visiting friends/relatives/social reasons (17%) and winery tourism (13%).

- **Attractions Visited**. Top attractions or locations visited include Downtown McMinnville (65%), Evergreen Aviation & Space Museum (54%), restaurants and tasting rooms (47%), wineries (40%), Portland (35%), and the Pacific Coast (30%)
- **Activity Participation**. Activities most frequently participated in include dining out (70%). visiting museums (49%), shopping (42%), visiting wineries/vineyards (42%), and going for a scenic drive (34%). Other activities include arts/cultural activities (13%), the farmers market (12%), hiking or trail running (12%), road or mountain biking, camping, a family event, and music/nightlife (each 6%).
- **Visitor Expenditures**. Trip average for the entire travel party is estimated at $331. Expenditures per person for the trip average $154. Expenditures per person per day average $99.
- **Experiential Ratings Strong**. Satisfaction ratings of various aspects of the McMinnville experience were very strong, averaging from a high of 4.6 on a 5-point scale for "overall quality of experience" to a low of 3.8 for "variety and quality of lodging choices."
- **Modest Net Promoter Score (NPS)**. Likelihood to recommend McMinnville or McMinnville's net promoter score (NPS) is 50%. A relatively large number of scores of 7 and 8 (rather than 9's and 10's) contribute to this score. Again, we would expect to see NPS improve over time as the destination grows and matures, continues to improve in all aspects (including infrastructure improvements, expanded lodging options, focus on customer service, etc.), and the destination broadens its overall product appeal and reach.
- **Likelihood to Return Mixed**. Similarly, respondents are fairly evenly split with respect to intentions of returning to McMinnville in the next twelve months—42% say they will "probably" or "definitely" return while 39% say it is "unlikely" or they definitely will not return. An additional 19% are "on the fence" or give it a 50/50 chance of returning.
- **Suggestions for Improvement**. Many respondents took the opportunity to express their positive impressions of McMinnville, particularly regarding the downtown area and the Evergreen Aviation & Space Museum. Common suggestions include the need for additional signage and maps to more easily find your way around town, more restaurant and lodging variety and options, and increased advertising of the town itself, its special events, and everything it has to offer.

DEMOGRAPHIC PROFILE & GEOGRAPHIC ORIGIN

Visitor Type (Day vs. Overnight Visits)

Over half of visitors this summer/fall were day visitors (58 percent). Overnight visitors staying in the McMinnville area accounted for an additional 39 percent of respondents surveyed, while seasonal residents/second homeowners accounted for the remaining 2 percent.

Demographic Profile

Specific demographic results from the visitor intercept survey include the following observations:

- Gender. Respondents were almost equally split between female (49 percent) and male (51 percent) this summer/fall.

- Age. Visitors generally skew older, with 60 percent of respondents age 55 or older with an average age of 55.0. An additional 13 percent were under 35, 9 percent age 35 to 44, and 17 percent age 45 to 54. Visitors coming from within Oregon were slightly younger on average than out-of-state visitors (53.8 years old vs. 55.4 years old).

- Annual Household Income. The average annual household income of summer and fall visitors to McMinnville was roughly $143,000, indicative of a relatively affluent visitor base. Half of respondent households earn $100,000 or more annually, with 19 percent earning $200,000 or more. Eight percent reported incomes of less than $50,000 annually, and approximately one-third (34 percent) earn between $50,000 and $100,000 each year. Perhaps unsurprisingly, overnight visitors (average household income $157,000) were generally more affluent than day visitors ($134,000).

Main Purpose of Visit to McMinnville

Respondents were asked to indicate the main purpose of their visit to the McMinnville area this summer/fall. Leisure and sightseeing was the top purpose by far, cited by 38 percent of respondents. Visiting friends/relatives/social reasons (17 percent) and winery tourism (13 percent) were also relatively popular trip purposes. Only marginal shares indicated that they were in McMinnville for arts/culture (3 percent), a special event (3 percent), outdoor recreation, business/professional reasons, combined business/pleasure (each 2 percent), or relocation (1 percent). "Other" reasons mentioned (20 percent) were primarily in reference to the Evergreen Air and Space Museum. Overnight visitors had a greater likelihood of visiting friends/relatives (25 percent) compared to day visitors (11 percent). Similarly, visiting friends/relatives was a more popular trip purpose among repeat summer visitors (22 percent) than first-time summer visitors (11 percent).

Visitor Mix (Oregon vs. Out-of-State)

Sixty-three percent of visitors this summer/fall were from outside of Oregon. Conversely, 37 percent of visitors reside within the state. In-state residents are the most frequent visitors of McMinnville, with Washington and California being the leading states of origin among out-of-state visitors. Together, these three states comprised almost two-thirds (63 percent) of the visitor base this summer/fall. Over half of repeat summer visitors were from Oregon (55 percent), compared to only 12 percent of first-time summer visitors (88 percent of first-time visitors are from out-of-state).

Key Geographic Markets

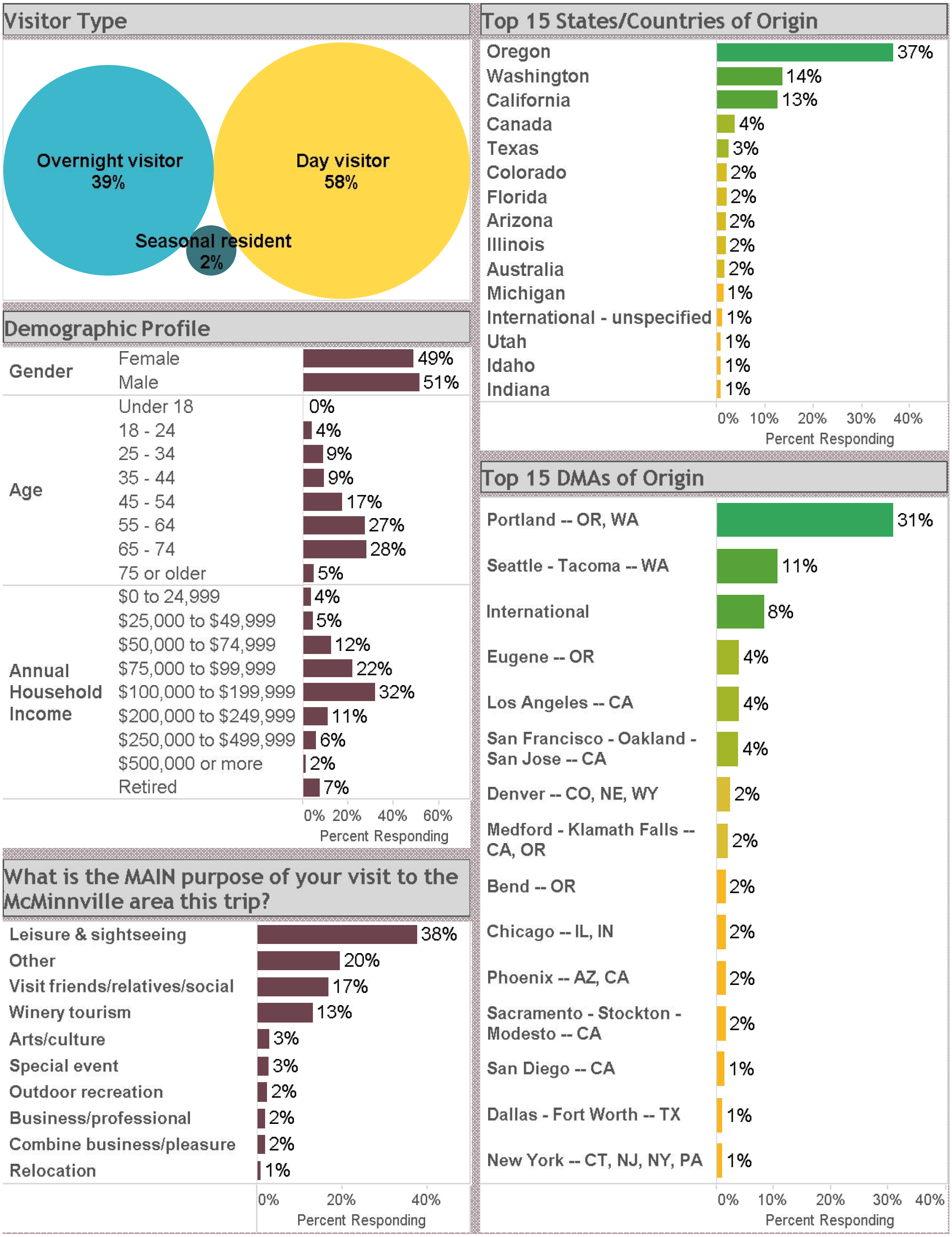
The most frequently identified markets within Oregon include the Portland Designated Market Area (DMA) (31 percent of visitors), followed by the Eugene DMA (4 percent), the Medford-Klamath Falls DMA, and the Bend DMA (each 2 percent).

As noted, Washington and California were the largest out-of-state markets for McMinnville this summer/fall, representing 14 percent and 13 percent of visits respectively, indicative of strong western regional representation among McMinnville visitors. The second tier of states and countries of origin for McMinnville area visitors include Canada (4 percent), Texas (3 percent), Colorado, Florida, Arizona, Illinois, and Australia (each about 2 percent).

Outside of Oregon, Seattle-Tacoma accounts for the largest proportion of visitors by DMA (11 percent of total visits), followed by Los Angeles (4 percent), San Francisco-Oakland-San Jose (4 percent), Denver, Chicago, Phoenix, and Sacramento-Stockton-Modesto (each 2 percent).

International visitors accounted for approximately 8 percent of visitors to McMinnville this summer/fall, with the strongest representation from Canada and Australia, as noted.

Figure 1
Visitor Type, Demographic Profile, Geographic Origin, and Main Purpose of Visit



LODGING DATA / OCCUPANCY

Lodging Occupancy

The lodging data through summer/fall 2016 generally indicate an upward trajectory in occupancy over the last 12 to 18 months, with growth noted in almost every month. However, some variability occurred this past summer. Summer 2016 months were either unchanged from 2015 (including June and July) or were off slightly from 2015 (including May, August, and September).

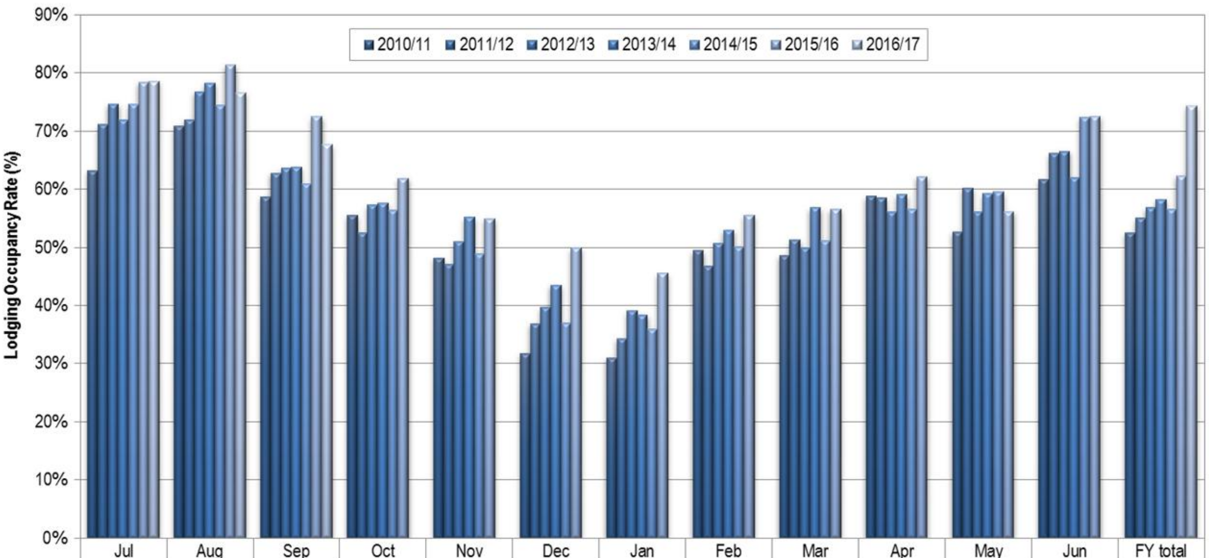
- August, typically the strongest month historically, was surpassed by July this year (76.6% occupancy in August vs. 78.6% in July). July at 78.6%, while similar to July 2015 (78.5%), made it the strongest July on record, while August fell from its record high of 81.4% in 2015. September was at 67.7% occupancy as compared to 72.5% in 2015. Altogether, summer occupancy during the core summer months June through September 2016 averaged 73.8% vs. 76.2% in 2015. October 2016 data was not yet available at the time of this report, but October 2015 was the strongest October on record at 61.9% occupancy.

- Also note the particularly strong growth apparent during the winter months (December 2015 at 50% occupancy vs. 30-40% historically). November, January, February, March, and April have also shown consistent growth.

- Average occupancy for the full fiscal year July 2015 through June 2016 averaged 62.3% as compared to 56.5% for FY1415, representing the strongest fiscal year on record.

Despite some fluctuations in the data and overnight travel patterns, the general upward trend overall reflects increasingly strong visitation to the McMinnville area.

Figure 2
McMinnville Lodging Occupancy Rates: July 2010 – September 2016
(Source: Smith Travel Research)



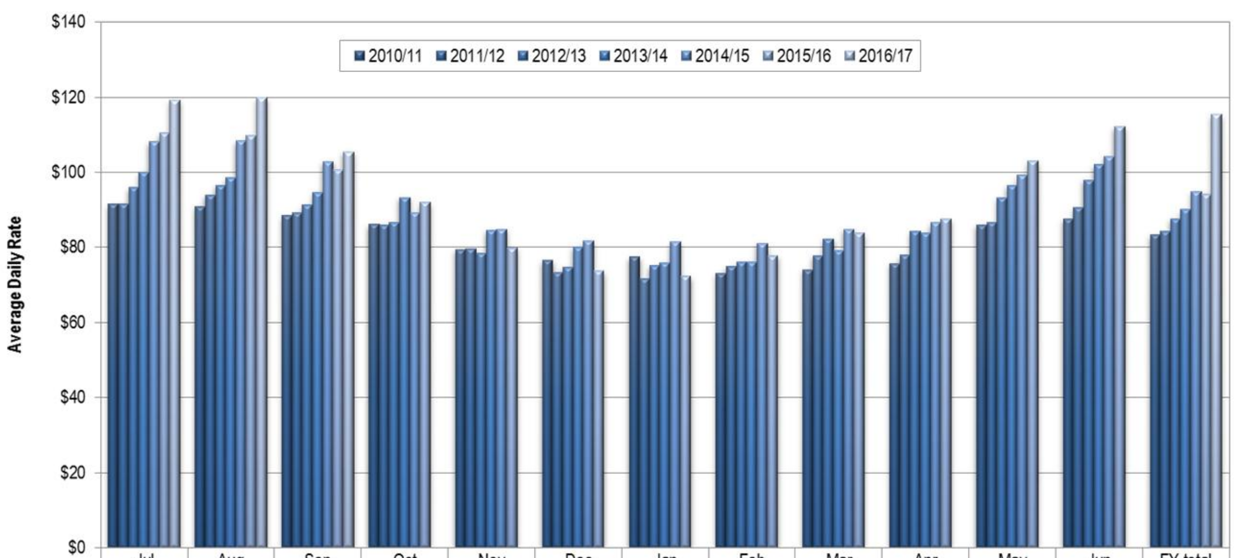
	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	FY total
2010/11	63.3%	70.9%	58.7%	55.6%	48.2%	31.7%	31.0%	49.5%	48.6%	58.8%	52.7%	61.6%	52.5%
2011/12	71.2%	72.0%	62.8%	52.5%	47.1%	36.8%	34.3%	46.7%	51.3%	58.6%	60.3%	66.2%	55.0%
2012/13	74.7%	76.8%	63.6%	57.3%	50.9%	39.7%	39.1%	50.7%	49.9%	56.2%	56.2%	66.5%	56.8%
2013/14	71.9%	78.3%	63.8%	57.6%	55.2%	43.5%	38.4%	53.0%	56.8%	59.1%	59.2%	62.0%	58.3%
2014/15	74.6%	74.5%	60.9%	56.5%	48.9%	36.9%	36.0%	50.1%	51.2%	56.6%	59.5%	72.4%	56.5%
2015/16	78.5%	81.4%	72.5%	61.9%	55.0%	49.9%	45.6%	55.6%	56.6%	62.2%	56.1%	72.6%	62.3%
2016/17	78.6%	76.6%	67.7%										74.3%

Average Daily Rate (ADR) and Revenue per Available Room (RevPAR)

The figures below depict average daily rate (ADR) and revenue per available room (RevPAR) for 2010-2016 by month in McMinnville. ADR was up in most months in 2016 with RevPAR tracking higher as well, indicating that hotel revenues remain stronger compared to historical. Although occupancy numbers are still very strong overall, some of the fluctuations noted in occupancy may be a result of increases in ADR possibly putting pressure on occupancies somewhat (with occupancy off in May, August, and September).

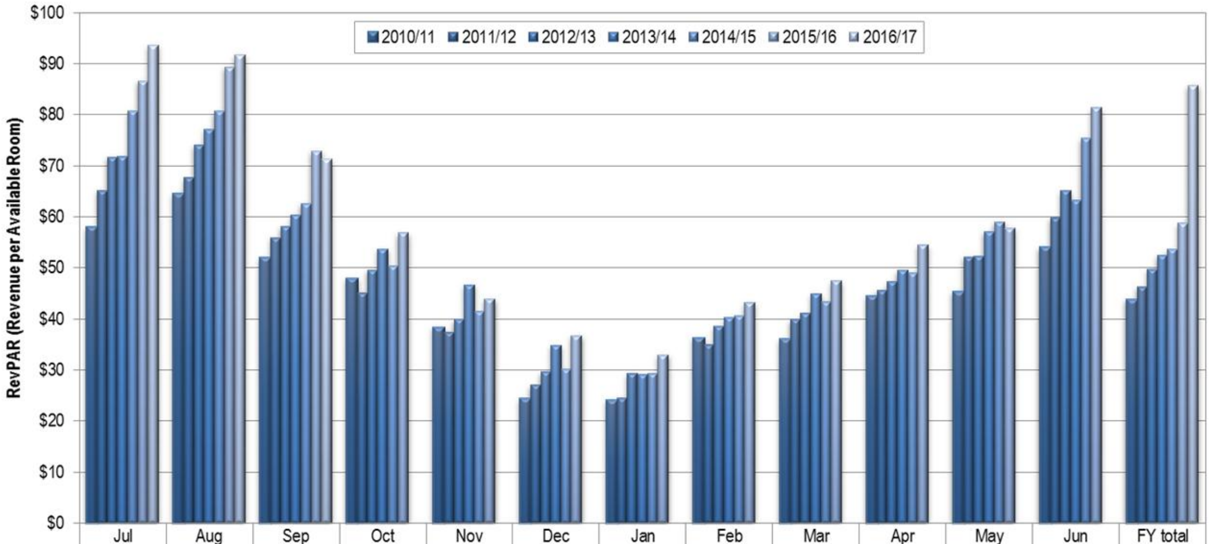
Or, tight occupancies in traditional commercial hotel/motel properties (essentially maxed-out in some key summer months) and increasing ADR's might possibly be pushing people to other shared accommodations options in the area, more staying outside of McMinnville in neighboring communities (Dundee, Newberg, Sherwood, etc.), and/or there could be an increasing number of day trips to the area (with some foregoing an overnight trip). Research in future years will attempt to further uncover and explain some of these bigger picture patterns and trends in visitor travel behaviors.

Figure 3
McMinnville Lodging – Average Daily Rates (ADR): July 2010 – September 2016
(Source: Smith Travel Research)



	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	FY total
2010/11	$91.47	$90.91	$88.46	$86.15	$79.42	$76.53	$77.40	$73.15	$74.02	$75.63	$85.98	$87.52	$83.27
2011/12	$91.61	$93.99	$89.19	$86.01	$79.53	$73.35	$71.58	$74.86	$77.81	$77.92	$86.54	$90.56	$84.28
2012/13	$95.99	$96.58	$91.34	$86.59	$78.35	$74.71	$75.08	$75.98	$82.29	$84.20	$93.21	$97.93	$87.65
2013/14	$99.99	$98.53	$94.61	$93.22	$84.57	$80.18	$75.87	$76.16	$79.05	$83.83	$96.52	$102.01	$90.10
2014/15	$108.14	$108.38	$102.83	$89.18	$84.83	$81.75	$81.43	$81.12	$84.78	$86.62	$99.20	$104.21	$94.90
2015/16	$110.41	$109.80	$100.62	$91.95	$79.91	$73.70	$72.27	$77.79	$83.78	$87.54	$102.99	$112.15	$94.21
2016/17	$119.25	$119.83	$105.40										$115.34

Figure 4
McMinnville Lodging - Revenue per Available Room (RevPAR): July 2010 – September 2016
(Source: Smith Travel Research)



	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	FY total
2010/11	$57.86	$64.49	$51.92	$47.87	$38.25	$24.28	$24.01	$36.19	$35.97	$44.47	$45.31	$53.93	$43.74
2011/12	$65.19	$67.66	$55.97	$45.17	$37.42	$27.02	$24.54	$34.99	$39.90	$45.66	$52.15	$59.90	$46.35
2012/13	$71.71	$74.15	$58.12	$49.58	$39.92	$29.65	$29.33	$38.54	$41.06	$47.28	$52.35	$65.13	$49.80
2013/14	$71.85	$77.15	$60.37	$53.72	$46.65	$34.88	$29.11	$40.37	$44.94	$49.54	$57.17	$63.27	$52.49
2014/15	$80.70	$80.69	$62.59	$50.38	$41.48	$30.18	$29.30	$40.67	$43.40	$49.01	$59.05	$75.46	$53.64
2015/16	$86.64	$89.37	$72.93	$56.87	$43.92	$36.77	$32.92	$43.24	$47.42	$54.44	$57.80	$81.38	$58.72
2016/17	$93.69	$91.80	$71.30										$85.75

TRIP CHARACTERISTICS / TRAVEL PLANNING

Other Destinations Considered for this Trip

More than one-third of respondents (39 percent) indicated that they considered other destinations for their trip, while the remaining 61 percent reported that McMinnville was the only area they considered. First-time summer visitors were particularly likely to have considered other destinations (50 percent) compared to repeat visitors (32 percent); similarly, out-of-state visitors more frequently considered other locations (50 percent) than did Oregon residents (21 percent—79 percent only considered McMinnville).

Visitors who indicated that they had considered another destination were asked a follow-up question to identify the other potential locations. An analysis of these comments is presented in Figure 5 to follow. Figure 5 includes a word cloud, where the size of the word directly correlates to the number of times it is mentioned, as well as a graphical summary of the number of mentions of each location. The top alternative destination was, by far, Portland (mentioned 61 times in the comments). The coast/Oregon Coast/west coast (32 mentions), Lincoln City (15 mentions), Salem (15 mentions), Seattle (13 mentions), and Newberg (12 mentions) were also popular alternatives to McMinnville, indicating that other destinations considered were largely in Oregon.

Proportion of First-Time vs. Repeat Visitors to McMinnville

Nearly three out of five respondents (58 percent) have been to McMinnville before in the summer, while the other 42 percent were making their first summer visit (ever). Approximately 39 percent of visitors have made between one and four summer visits to McMinnville previously, while 13 percent are more frequent visitors, having made between five and twenty previous summer visits. Seven percent have made 21 or more previous summer visits.

Summer-Winter Crossover Visitation

Summer-winter crossover visitation to McMinnville is fairly strong, with almost half of respondents (46 percent) indicating that they have previously visited McMinnville during the winter. In-state visitors are particularly likely to have previously visited McMinnville during the winter (81 percent). Based on these results, McMinnville has been relatively successful at summer-winter crossover visitation and should continue to support such year-round visitation and “sampling” of the opposite season.

Travel Party Composition

The average travel party size of respondents overall this summer/fall was 2.5 people. Fifteen percent of visitors were traveling alone, just over half with one other person (55 percent), and 29 percent in a group of three or more.

Respondents most frequently indicated that they were traveling with their spouse/partner (53 percent), family/children (30 percent), or with friends (16 percent).

What information sources did you use to plan your trip to McMinnville?

Respondents were asked what information sources were most effective in planning their visit to McMinnville. Word of mouth/talked to friends or family topped the list (44 percent), followed the experience of a prior visit (27 percent), websites (14 percent), and the Visit McMinnville website specifically (12 percent). The most frequently mentioned websites used other than Visit McMinnville were the Evergreen Aviation & Space Museum website, Google, and Trip Advisor. Other sources of information used by more modest shares of respondents include a travel book (7 percent), brochures (3 percent), social networking sites, a smart phone app, a newspaper or magazine article (each 2 percent), or a travel agent (1 percent).

How did you hear about McMinnville?

Respondents were asked to identify the sources through which they had heard about McMinnville. Two in five mentioned a recommendation from friends or family (40 percent), indicating the strength of non-traditional “advertising.” An additional one-third (35 percent) cited a previous visit to McMinnville. Other less common sources include other websites (10 percent), the Visit McMinnville website (4 percent), an article in a magazine or newspaper (4 percent), Trip Advisor (2 percent), Facebook (2 percent), and several other less frequently mentioned sources.

A follow-up question asked respondents if they remembered any messages or slogans from the information sources that were particularly effective. Five percent recalled some specific message (see full list of responses in the open-ended comments). The most frequently mentioned ads or messages were the references to wine and McMinnville as wine country as well as Turkey Rama. Exposure to advertising was slightly higher among repeat summer visitors (6 percent) than first-timers (3 percent).

Figure 5
Trip Characteristics

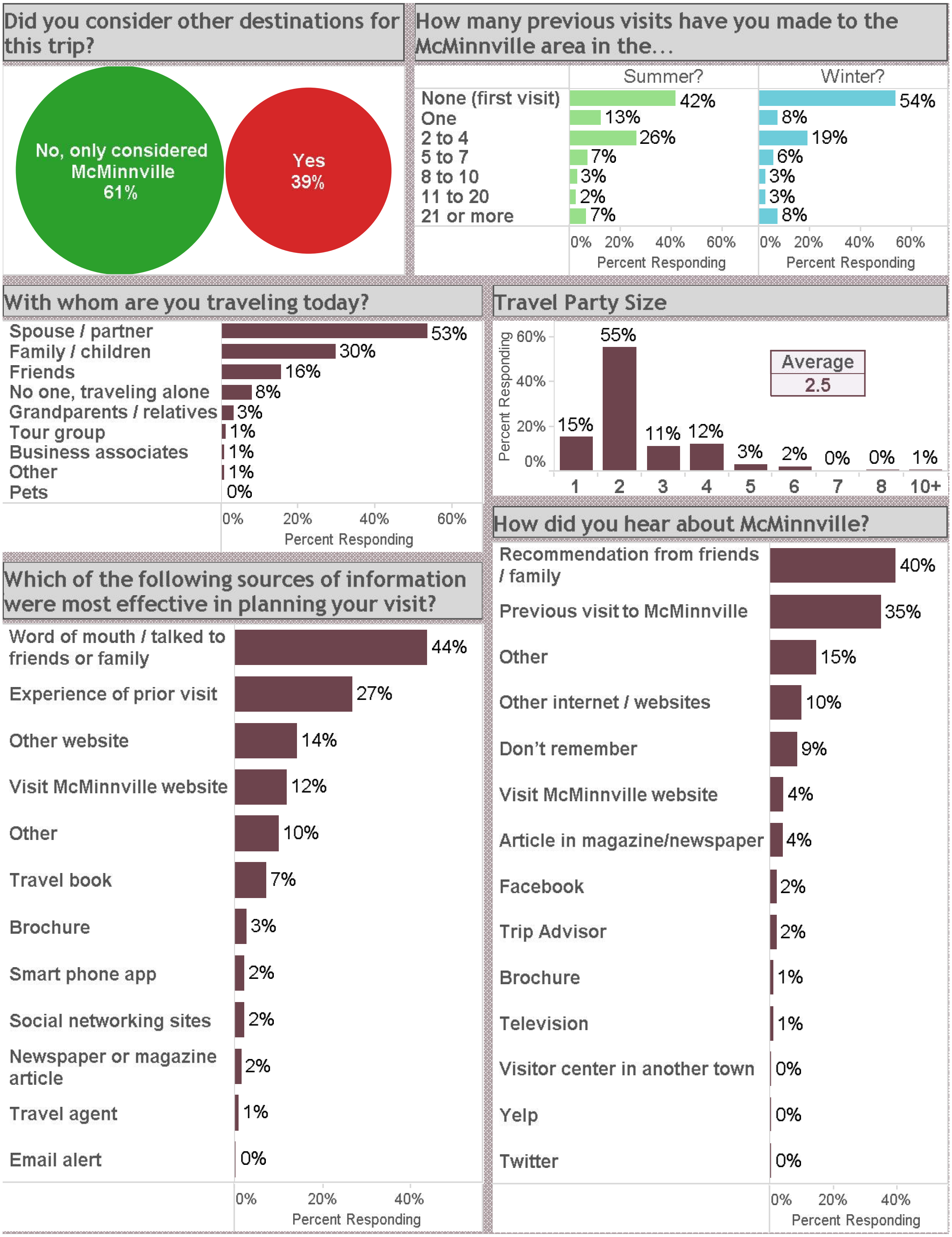
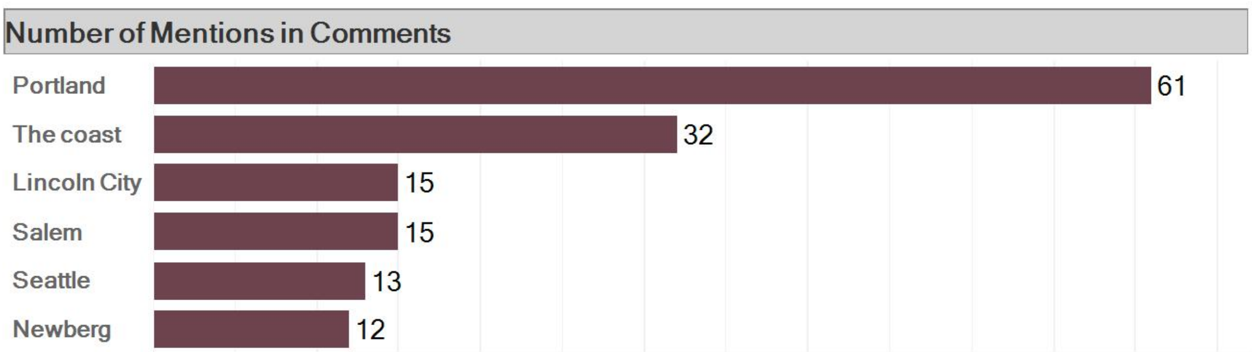


Figure 6
Other Destinations Considered for this Trip



LENGTH OF STAY AND ACCOMMODATIONS

Length of Stay (overnight and seasonal visitors only)

Among those staying overnight in McMinnville, the average number of nights stayed this summer/fall was 3.4 nights. Twenty-one percent stayed one night, 44 percent two nights, 24 percent three to five nights, and 11 percent 6 or more nights. Out-of-state visitors typically had longer stays, with an average of 3.7 nights, compared to an average length of stay of 2.5 nights among Oregon residents.

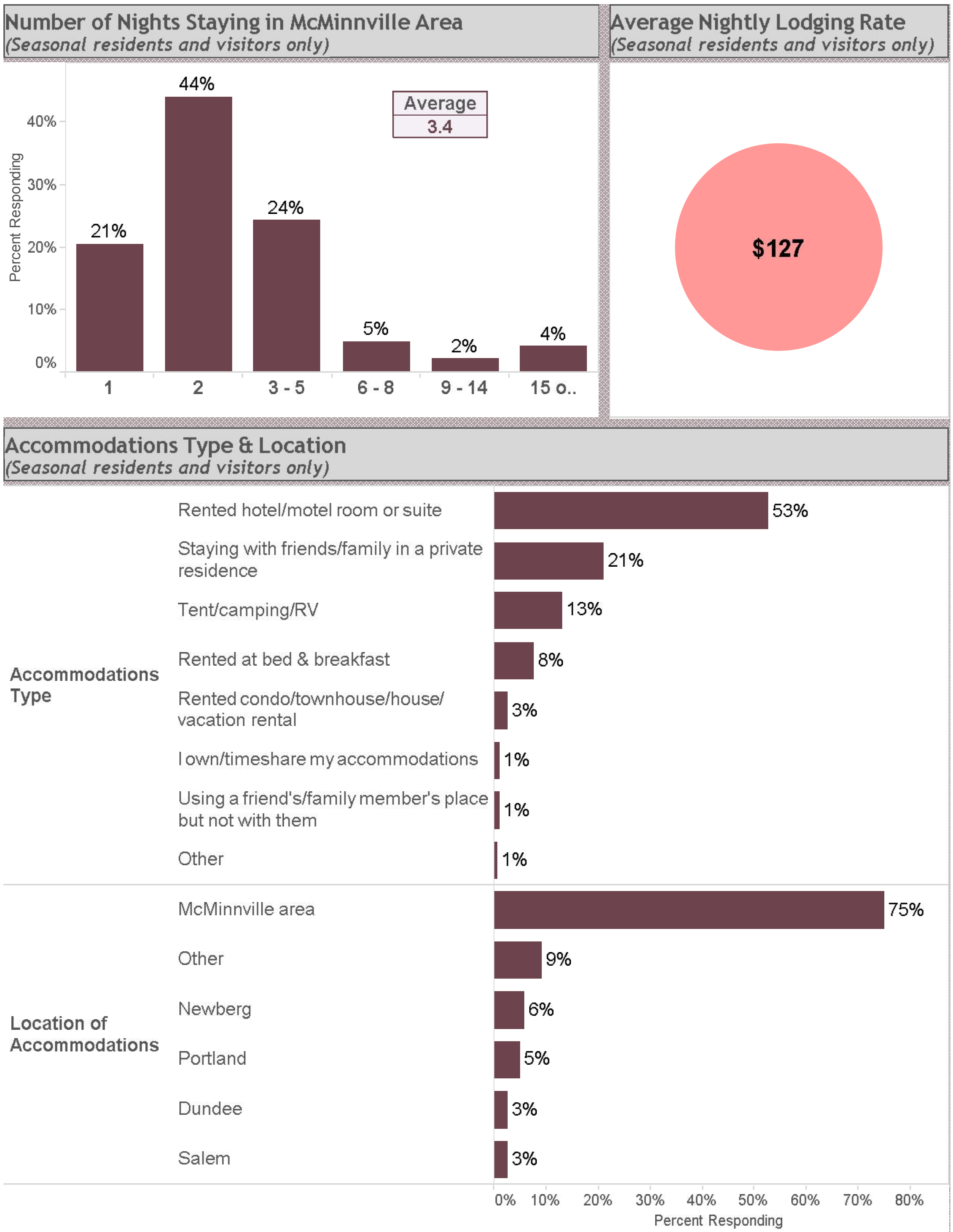
Location, Price & Type of Accommodations (overnight and seasonal visitors only)

Based on the survey data, those renting a hotel/motel room or suite accounted more than half of overnight visitors this summer/fall (53 percent), while those staying with friends or family in the area represented an additional one-fifth of overnight visitors (21 percent). Tent/RV camping was used by 13 percent of overnight visitors, followed by renting at a bed and breakfast (8 percent) and renting a condo/townhouse/house (3 percent). Repeat summer visitors more frequently stayed with friends or family (29 percent vs. 13 percent first time visitors), while first-timers were more likely to tent/RV camp (18 percent vs. 9 percent repeat visitors) or rent at a bed and breakfast (13 percent vs. 4 percent).

Visitors were asked what the nightly rate of their accommodations was. The average rate was $127, with 28 percent spending less than $100 a night, 60 percent paying between $100 and $200, and 13 percent spending $200 or more.

Overnight visitors were asked where their lodging accommodations were located. Three-quarters (75 percent) indicated that they stayed in the McMinnville area. Other locations mentioned include Newberg (6 percent), Portland (5 percent), Dundee, and Salem (each 3 percent.

Figure 7
Accommodations



ATTRACTIONS VISITED AND ACTIVITY PARTICIPATION

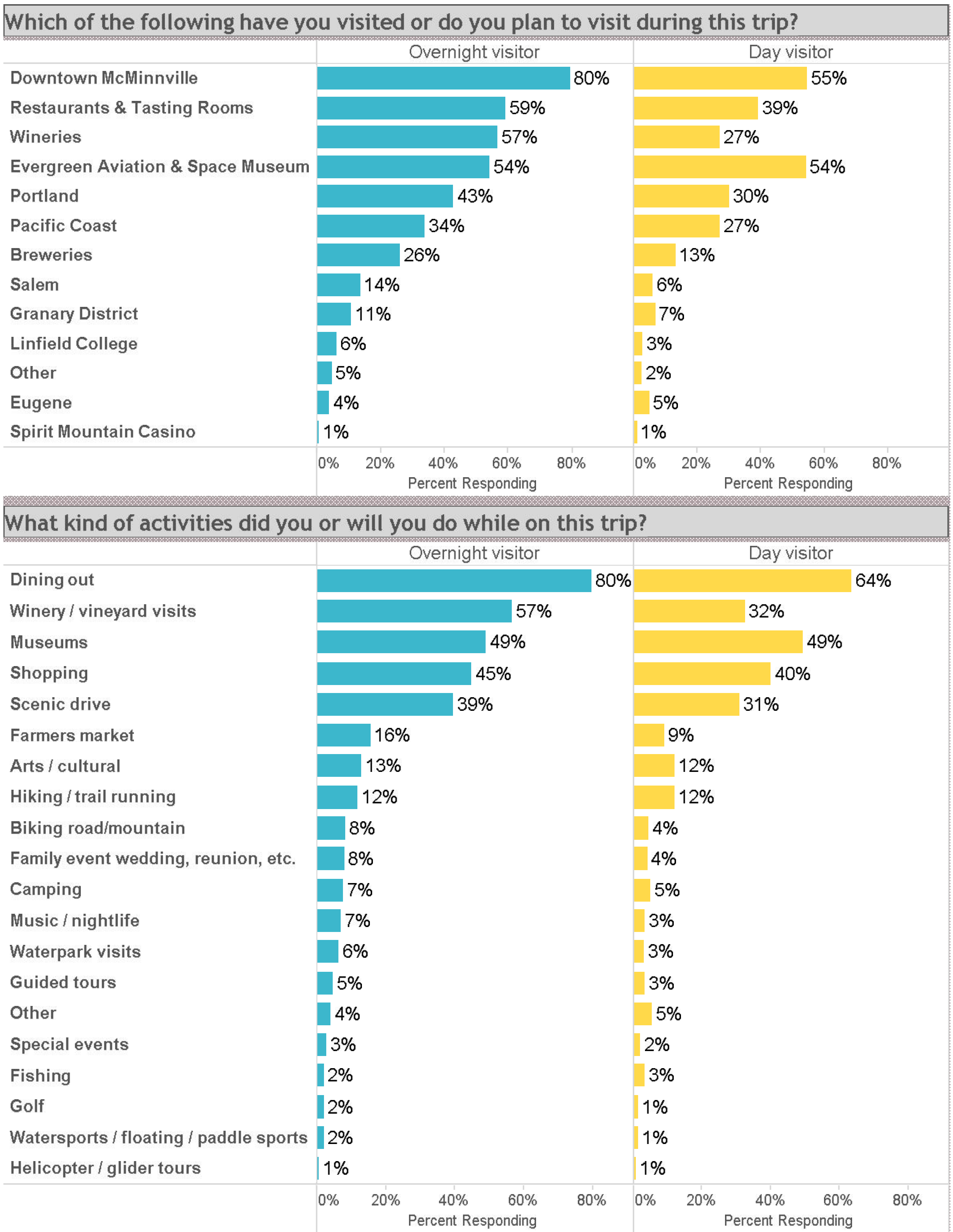
Attraction Visitation

Respondents were also asked to indicate which attractions or locations they had visited or planned to visit during their summer/fall visit to McMinnville. Downtown McMinnville (65 percent visited) attracted the greatest proportion of visitors. Other popular attractions included the Evergreen Aviation & Space Museum (54 percent), restaurants and tasting rooms (47 percent), wineries (40 percent), Portland (35 percent), and the Pacific Coast (30 percent). Eugene (5 percent), Linfield College (4 percent), and the Spirit Mountain Casino (1 percent) attracted a relatively smaller share of respondents. In general, overnight visitors had a much greater likelihood of visiting all of the listed attractions with the exception of the Evergreen Aviation & Space Museum, which appears to have a strong appeal to overnight and day visitors alike. Out of state visitors also visited a larger number of attractions on average (about 3.9 attractions on average vs. 2.7 for day visitors).

Activity Participation

When asked in what activities they participated during their trip to McMinnville, respondents most frequently mentioned dining out (70 percent). Forty-nine percent visited museums, 42 percent shopped, 42 percent visited wineries/vineyards, and 34 percent went for a scenic drive. Other activities include arts/cultural activities (13 percent), the farmers market (12 percent), hiking or trail running (12 percent), road or mountain biking, camping, a family event, and music/nightlife (each 6 percent). Out of state visitors were comparatively more likely to visit wineries/vineyards, take a scenic drive, shop, or go to the farmers market.

Figure 8
Attraction Visitation and Activity Participation



EXPENDITURES

Average Per Capita Daily Expenditures

The overall daily mean (average) per capita expenditure is estimated at $99 per person per day, with higher average expenditures reported by overnight visitors ($124) than by day visitors ($82).

Average Expenditures Per Person Per Trip

For the total trip, visitors estimated they would spend a total of approximately $154 per person. Out-of-state travel parties spent more money on average ($179) than in-state travel parties ($109), and overnight guests spent more than day visitors ($258 vs. $82).

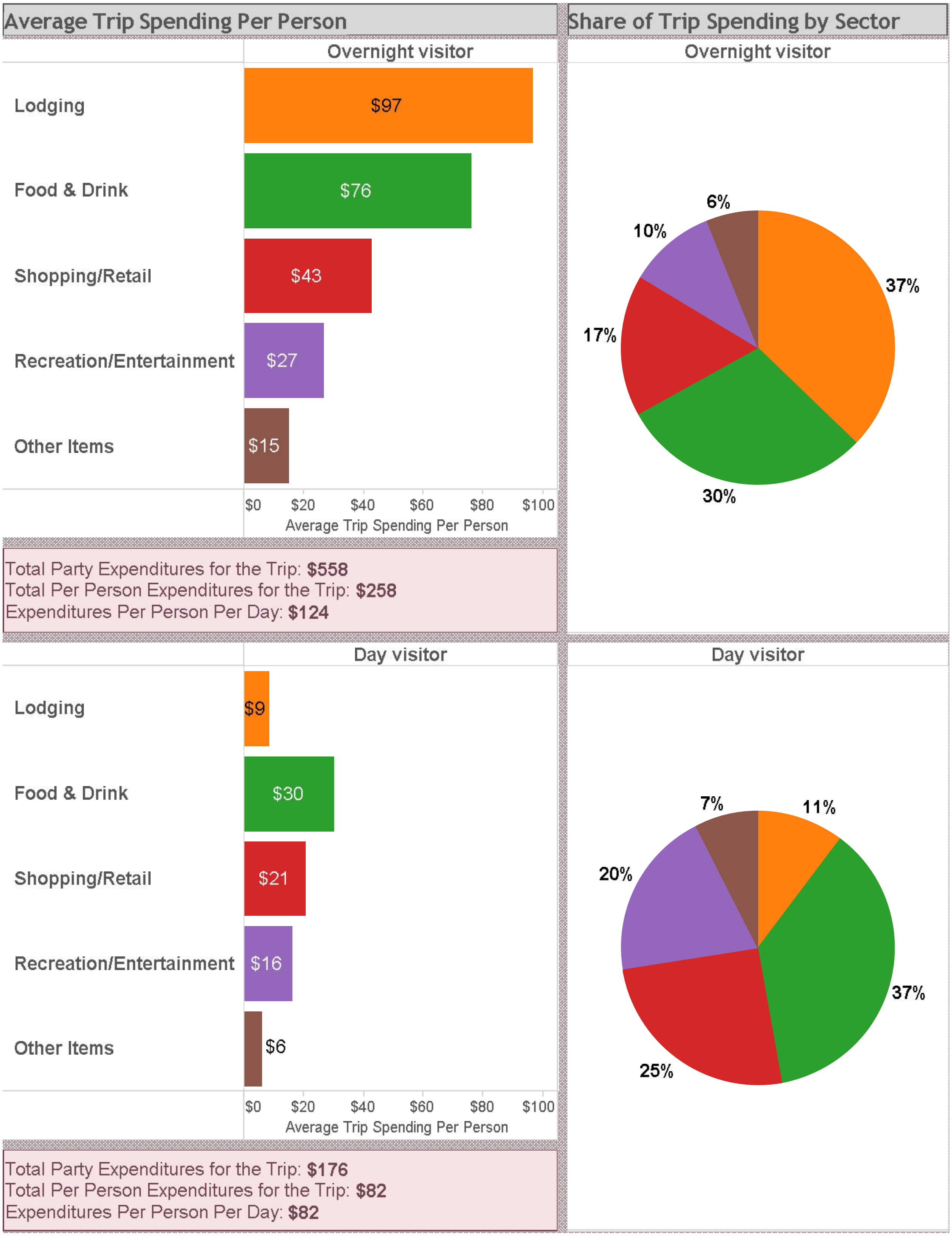
For the trip, food and drink expenditures accounted for about 32 percent of the total amount spent per person for the trip (average $49). Lodging accounted for about 29 percent of total per person per trip spending ($44). Shopping accounted for 19 percent of spending ($30), followed by recreation/entertainment/activities at 14 percent ($21) and other items at 6 percent ($10).

Average Expenditures Total Travel Party Per Trip

For the total trip, visitors estimated they would spend a total of approximately $331 for their total immediate travel party. Out-of-state travel parties spent more money on average ($385) than in-state travel parties ($221), while overnight travel parties spent $558 for the trip compared to $176 for day visit travel parties.

For the trip, food and drink expenditures accounted for about 32 percent of the total amount spent (average $106). Lodging accounted for about 28 percent of total spending ($92). Shopping accounted for 19 percent of spending ($64), followed by recreation/entertainment/activities at 14 percent ($47) and other items at 6 percent ($21).

Figure 9
Expenditures



EXPERIENTIAL RATINGS AND NET PROMOTER SCORE (NPS)

Experiential Ratings of McMinnville

Respondents were asked to rate a variety of aspects of their trip experience this summer/fall on a scale from 1 to 5, where 1 means “poor” and 5 means “excellent.” All items received very strong ratings, most notably the overall quality of the experience, with 95 percent of respondents providing a 4 or 5 rating and a 4.6 average rating. Variety and quality of restaurant choices (average rating 4.4), variety and quality of activities/things to do (4.3), and information/maps/directions (4.0) were also rated very high. Variety and quality of lodging choices was rated lowest with an average of 3.8 (and 35 percent scores of 3 or lower); however, the generally exceptional scores provided for all of the listed factors indicate a highly satisfactory experience overall in McMinnville.

Likelihood to Return

When asked how likely they are to return to McMinnville in the next twelve months, respondents were fairly evenly split. Forty-two percent of visitors indicated that they are “100% - definitely” or “75% - probably” likely to return to McMinnville in the next year, while 39 percent indicated that they are “0% - not at all” or “25% - unlikely” to return to McMinnville in that timeframe. An additional 19 percent said they will “50% - maybe” return. Despite a strong trip experience as evidenced by solid experiential ratings, visitors are split on whether or not they will return to McMinnville in the near future.

In-state visitors were particularly likely to indicate that they plan on returning (66 percent “probably” or “definitely”) when compared to out of state visitors (29 percent); similarly, repeat visitors said they intend to return much more frequently (57 percent) than first-time visitors did (20 percent).

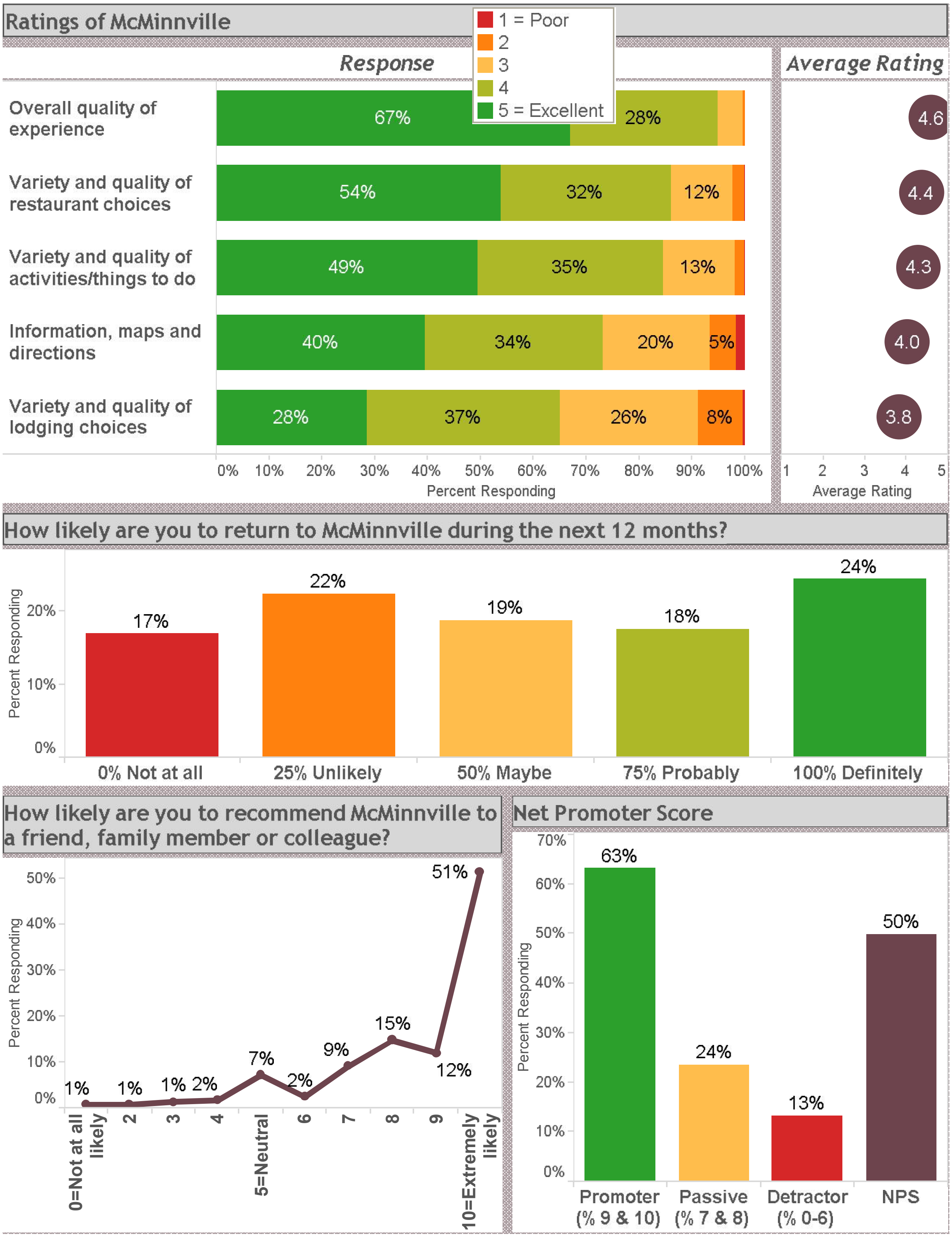
Net Promoter Score (NPS) / Likelihood to Recommend

RRC has been asking the following question at resorts and destinations nationally for many years in the effort to better measure destination success and customer satisfaction: "How likely would you be to recommend this destination (McMinnville) to a friend, family member, or colleague?" The answer scale to this question is based on an 11-point scale where 0=not at all likely, 5=neutral, and 10=extremely likely. The results are intended to quantify word of mouth and measure how well a resort or destination is regarded among its customer base; this question is asked in many other industries and is considered an important benchmark of a company's performance and potential future growth.

Respondents who give rating scores of 9 or 10 (63 percent in McMinnville this summer/fall) tend to be "promoters" of the destination being rated—they speak highly of it when asked—the destination's most loyal and strongest "promoters." Respondents who give scores of 7 or 8 (24 percent) tend to be more impartial or passively satisfied, not necessarily a strong promoter but neither a detractor as well. These guests probably wouldn't say anything bad about the destination, but they aren't raving fans either. Respondents who give ratings of 6 or below (13 percent) are "detractors"—if asked, likely to be less than enthusiastic or are more likely to not have good things to say about the destination. As such, McMinnville's "net promoter score" (percentage of promoters minus percentage of detractors) is 50 percent this summer/fall.

Oregon residents provided a better NPS (62 percent) than out of state visitors (46 percent). Repeat summer/fall visitors also gave a higher NPS of 59 percent than their first-timer counterparts (39 percent).

Figure 10
Experiential Ratings and Net Promoter Score



SUGGESTIONS / OPEN ENDED COMMENTS

The survey gave respondents the opportunity to provide any additional comments about their experience in McMinnville. Over 200 comments were received. Many respondents took the opportunity to express their positive impressions of McMinnville, particularly regarding the downtown area and the Evergreen Aviation & Space Museum. The most common suggestions that visitors had include the need for additional signage and maps to more easily find your way around town, more restaurant and lodging variety and options, and increased advertising of the town itself and its special events. A sampling of the comments is provided below.

Example Comments

- *Alternate routes for traffic would be nice.*
- *Better signs/directions to museum needed.*
- *Cute downtown area!*
- *Downtown needs a kiosk map.*
- *Farmers market good.*
- *Great museum and water park... perfect for my family.*
- *Great small town!*
- *Increase signage.*
- *Keep doing what you're doing!*
- *Like the free parking.*
- *Love it but horrid traffic getting here.*
- *Love visiting, will continue to come back.*
- *More bed and breakfasts.*
- *More food chains.*
- *More lodging.*
- *More maps of things to do, driving tour of area. Publish daily/weekly activities during the summer days. List live music events at bars, street, restaurants. List free things to do.*
- *More things to do.*
- *Nice and clean.*
- *None.*
- *Not at this time. Everyone friendly and helpful. Cheers.*
- *Promote what is available as we weren't aware until we came here.*
- *Shops should stay open later.*
- *The Crescent Cafe and olive oil store are wonderful.*
- *Very nice place to visit.*
- *Would be nice to shut down streets for peds.*