

WALLA WALLA VALLEY WINE INDUSTRY

ECONOMIC IMPACT ANALYSIS



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SUBMITTED TO



WALLA WALLA VALLEY WINE



SUBMITTED BY



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EXECUTIVE SUMMARY

The Walla Walla Valley wine industry is a major driver of economic development and growth in southeast Washington and northeast Oregon. The industry fosters broad-based economic growth through winery operations, visitor spending on wine-related tourism activities, and upstream supply chain transactions, such as the sale of grapes from growers to winemakers.

WINE PRODUCTION IS A MAJOR EMPLOYER IN THE REGION.

According to data from the Washington State Liquor and Cannabis Board (LCB), there were 158 active winery licenses in Walla Walla County as of March 2023; an additional ten wineries operate in Milton-Freewater, Oregon. These wineries in 2022 generated an estimated \$248.0 million in sales and directly employed 990 workers with total earnings (wages & salaries plus value of benefits) of \$55.3 million.

WINE TOURISM SUPPORTS JOBS AMONG SERVICES BUSINESSES.

In addition to wine production, the wine industry draws significant inflows of tourists to the Walla Walla Valley region. In 2022, Walla Walla and Umatilla counties hosted an estimated 528,000 wine tourism visits with associated wine tourism spending of \$260.4 million. The largest single category of wine tourism spending was on wine itself, with an estimated \$75.5 million in outlays, followed by lodging and accommodations and food and beverage expenses, excluding wine tasting fees and other winery-based events.

THE WINE INDUSTRY SUPPORTS ADDITIONAL ECONOMIC IMPACTS ACROSS THE REGION THROUGH SUPPLY CHAIN TRANSACTIONS AND HOUSEHOLD CONSUMPTION.

This spending—in the form of winery sales and visitor tourism consumption—represents a net inflow of capital, or the equivalent of services-based regional exports, which are then re-spent throughout the economy through upstream business-to-business transactions and household consumption among workers supported through the wine industry. Combined, in 2022 these activities supported a total regional economic impact of nearly 3,500 jobs, \$165.2 million in associated labor income, and \$588.9 million in business sales, or “output.” These impacts in turn supported \$26.1 million in state and local taxes in Washington state, including business & occupation taxes, sales tax, and hotel taxes.

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INTRODUCTION

BACKGROUND AND PURPOSE

The Walla Walla Valley is among the oldest and most recognized clusters of premium wine in the Pacific Northwest. The Walla Walla Valley American Viticulture Area (AVA) spans the Washington-Oregon boundary, including most of Walla Walla County in Washington and northern Umatilla County, Oregon. The vast majority of wine production takes place in Walla Walla County, while Umatilla County has emerged as an important source of high quality wine grapes. The Rocks District of Milton-Freewater in Oregon was established in 2015 and is a nested-appellation within the Walla Walla Valley.

The wine industry drives dynamic, broad-based economic activity. The production of wine entails a regional supply chain and ecosystem of wineries, vineyards, agricultural equipment and soil preparation providers, and suppliers of winemaking equipment, barrels, bottles, and various other key inputs. The distribution and sale of wine to consumers is channeled direct-to-consumer transactions, such as wine clubs and tasting room sales, third party distributors, retailers, and restaurants. Wine is also a major driver of regional tourism and inbound tourism spending on various other businesses as part of wine itinerary, such as hotel accommodations, restaurants, travel expenses, and gifts. These three categories of activity—wine production, wine distribution & sales, and wine tourism—support business revenues, employment, income, and taxes throughout the regional economy.

This study, commissioned by the Walla Walla Valley Wine Alliance, assesses these varied impacts and their broader spillover effects to the regional economy.

METHODS

This report leverages several key data sources. Wine industry business and visitor spending draw on survey data of wine producers and visitors, conducted by consulting firm GMA Research and Walla Walla Community College contractors and staff. These estimates were supplemented with employment, wage, and gross business income data published by the Washington State Employment Security Department, Washington State Department of Revenue, and Washington State Liquor and Cannabis Board. Economic impacts were computed through use of the Washington State Input-Output Model, with modifications to localize estimates to the Walla Walla Valley region (including Umatilla County, Oregon).

This report benefited enormously from the last economic impact study, conducted in 2019, by University of Washington Department of Geography professor William Beyers (1940-2022) and GMA Research (Beyers & Morgan, 2019). Professor Beyers's methods and frameworks to measuring the scope, scale, and economic impact of wineries and wine tourism in the Walla Walla region provided critical insights that guided this updated analysis.

ORGANIZATION OF REPORT

The remainder of this report is organized as follows:

- **Wine visitor spending trends.** Review of key findings from a survey of winery and tasting room visitors, including spending patterns.
- **Winery survey.** Key findings and takeaways from a survey of wine producers in the region, including on business operations, ownership, payroll, and sales.
- **Estimated direct and total economic and fiscal impacts.** Jobs, income, and business revenues generated in Washington state and the Walla Walla Valley through direct wine production, distribution and sales, and wine tourism, and additional impacts through upstream business-to-business activities (indirect) and wine-related income spent on other household goods and services (induced).
- **Summary and conclusions.** Review of key findings.

WINE TOURISM

Through the spring and summer of 2023, GMA Research developed and deployed an online survey to solicit spending and tourism activities among visitors to the region. The survey was advertised at wineries and tasting rooms in the region, with a QR code for patrons to scan to visit the short online survey questionnaire. The survey probes several key topics, including origin, group size, duration of stay, total wine tourism budget, breakdown of expenses by category, mode of transport to and from Walla Walla, frequency of visits to the region, and perceptions of Walla Walla and regional amenities.

The survey gathered 810 responses. The discussion below presents summary results and takeaways.

VISITOR CHARACTERISTICS AND WINE CONSUMPTION

Among survey participants, more than half (54%) were parties of two, while another 28% were three or more (**Exhibit 1**). More than half of respondents were between the ages of 50 and 69, while 8.2% were between 21 and 29 (**Exhibit 2**). Approximately 44.8% of respondents belonged to a household whose combined annual income was at least \$250,000 (**Exhibit 3**).

EXHIBIT 1. INCLUDING YOURSELF, HOW MANY MEMBERS OF YOUR HOUSEHOLD PARTICIPATED IN YOUR MOST RECENT VISIT TO WALLA WALLA? (N = 736)

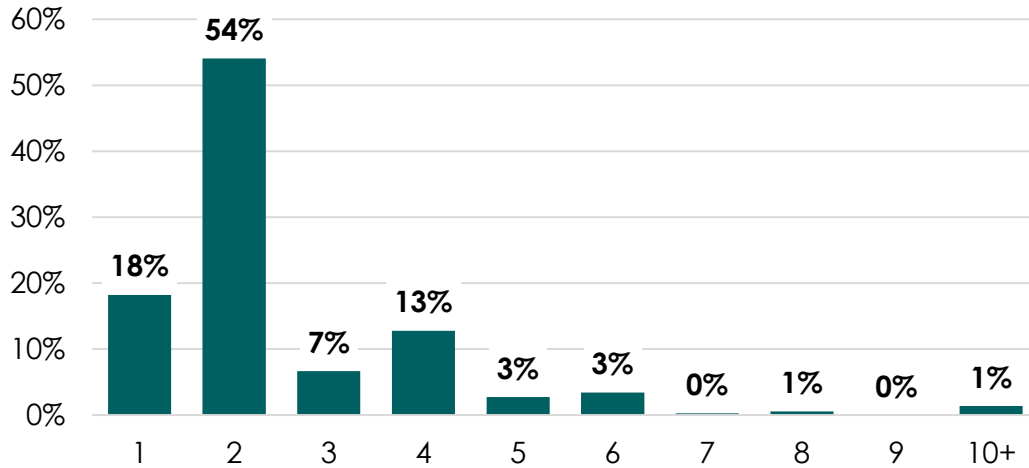


EXHIBIT 2. AGE GROUP (N = 613)

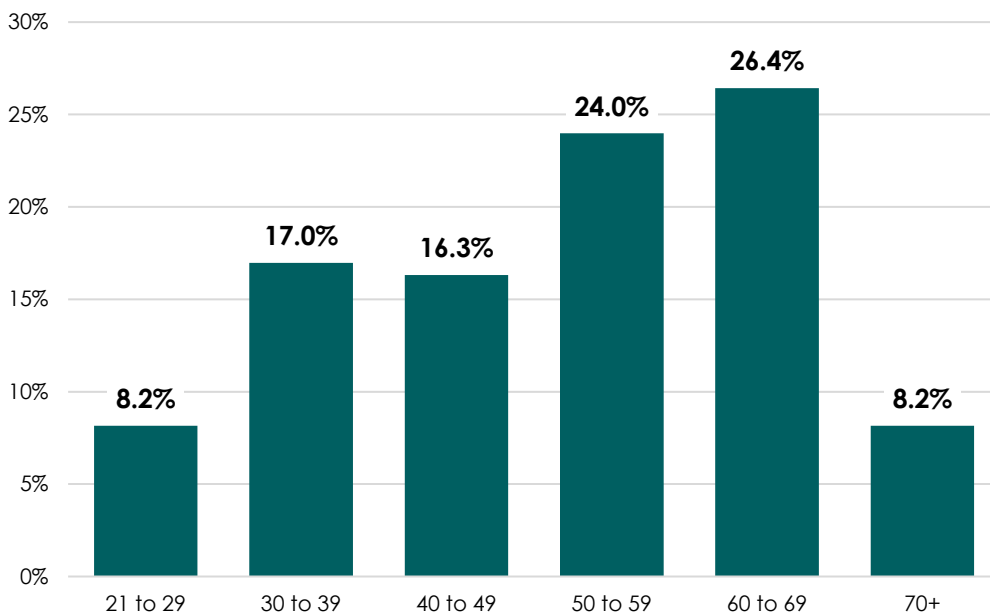
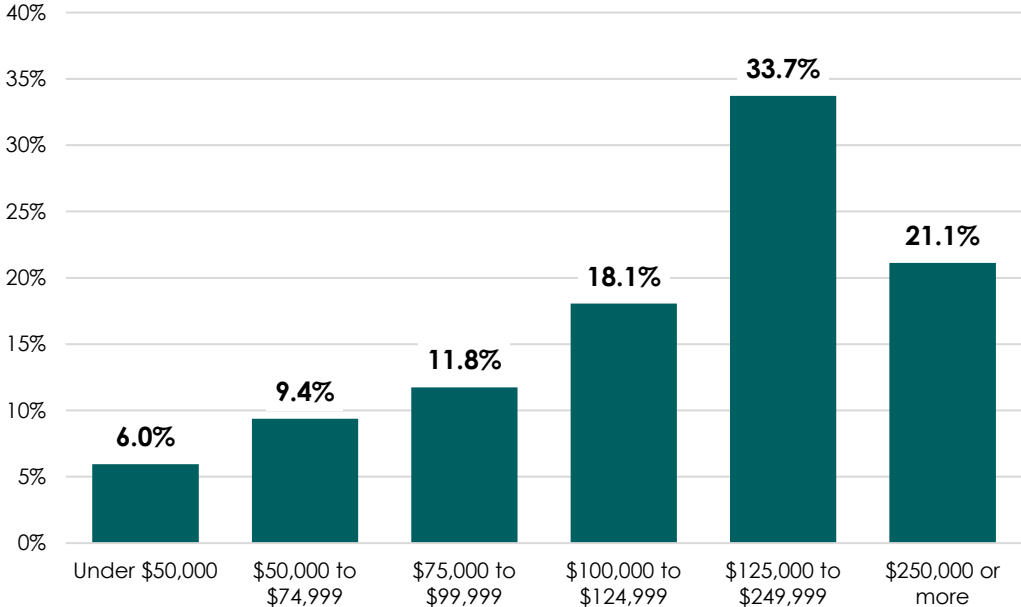


EXHIBIT 3. COMBINED ANNUAL HOUSEHOLD INCOME (N = 587)



WALLA WALLA VISITATION EXPERIENCE AND ITINERARY

We next asked a series about each participants unique experience in Walla Walla. Nearly three quarters of participants reported they drove to Walla Walla as their mode of transportation (**Exhibit 4**); this is consistent with winery and stakeholder interviews that suggested the vast majority of wine tourists are from within the region, including Seattle, Portland, Spokane, and locations in Idaho.

Among winery and tasting room visitors, nearly 80% reported wine-related activities were the primary reason for their trip to the area (**Exhibit 5**). One in four (24.5%) of respondents stayed in the area for two days, while 63.6% reported staying three or more days (**Exhibit 6**).

Wine clubs are an important source of winery sales, and members are often drawn back to the region due to membership benefits. Among respondents, 30.2% reported not belonging to any wine clubs—Walla Walla or elsewhere—and 52.7% reported not belonging to a wine club in Walla Walla (**Exhibit 7** and **Exhibit 8**). However, visits to one or more wineries may result in new members among those who previously did not belong to any local wine clubs.

EXHIBIT 4. MODE OF TRAVEL GETTING TO THE WALLA WALLA VALLEY (N= 734)

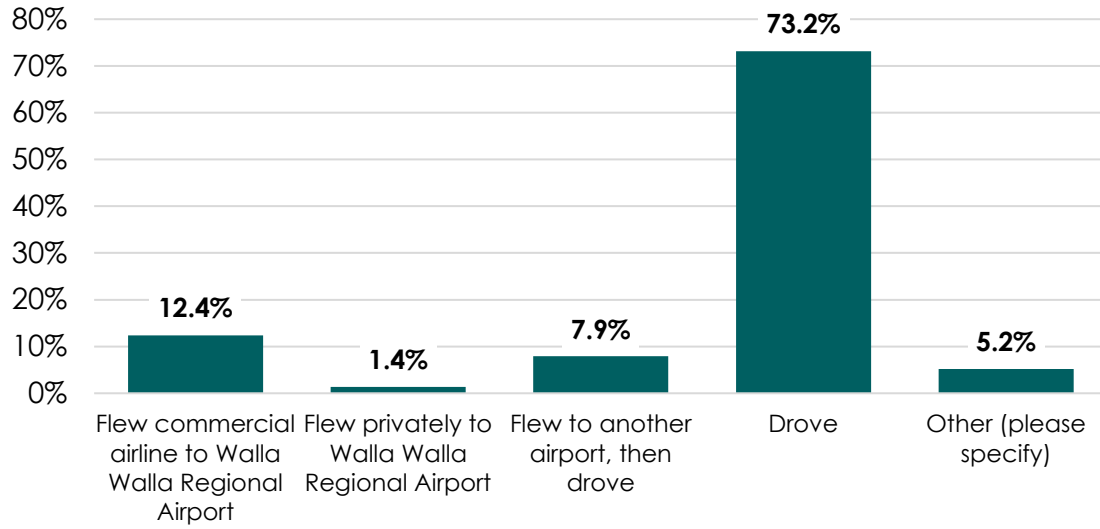


EXHIBIT 5. WAS THE PRIMARY REASON FOR YOUR VISIT TO WALLA WALLA TO VISIT WINERIES, TASTING ROOMS OR OTHERWISE ENGAGE IN WINE-RELATED ACTIVITIES? (N = 734)

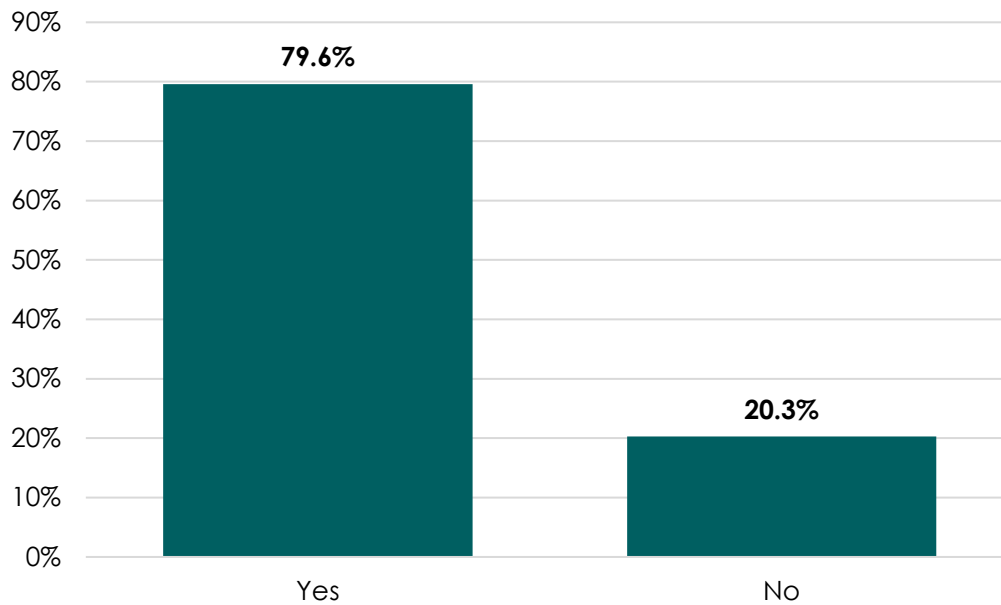


EXHIBIT 6. LENGTH OF STAY IN THE WALLA WALLA VALLEY REGION (N = 716)

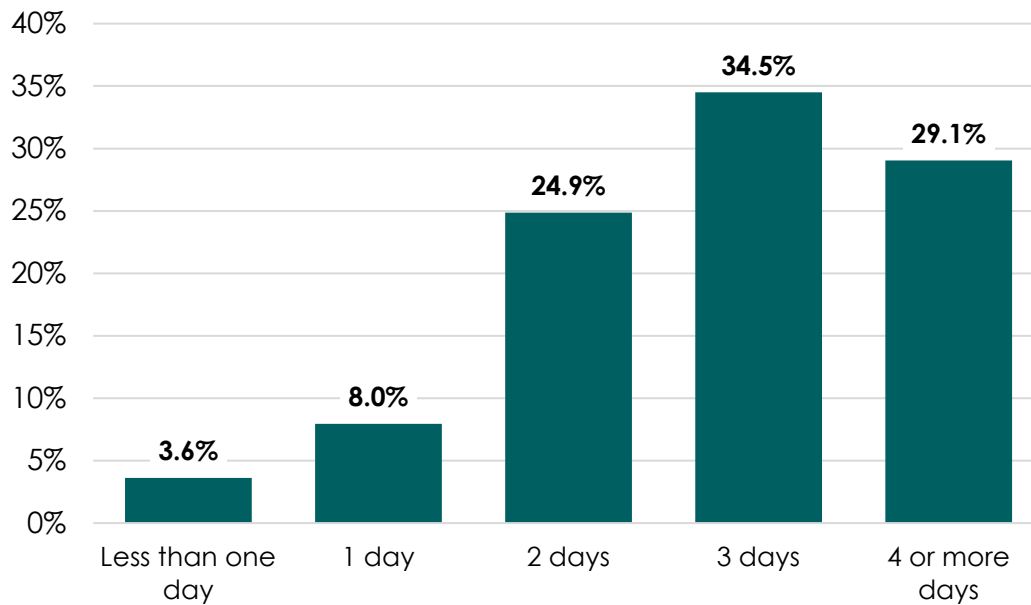


EXHIBIT 7. OVERALL, HOW MANY WINE CLUBS DO YOU BELONG TO, INCLUDING WALLA WALLA VALLEY WINERIES AND OTHERS? (N = 626)

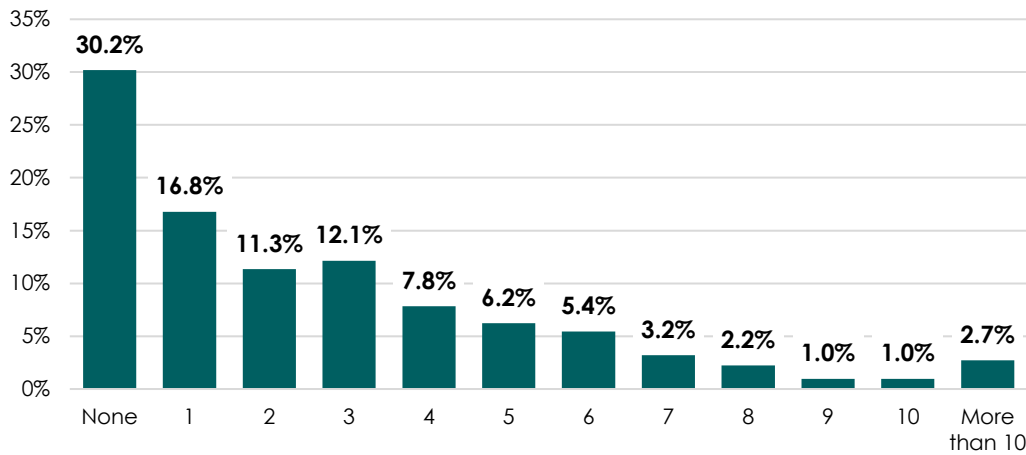
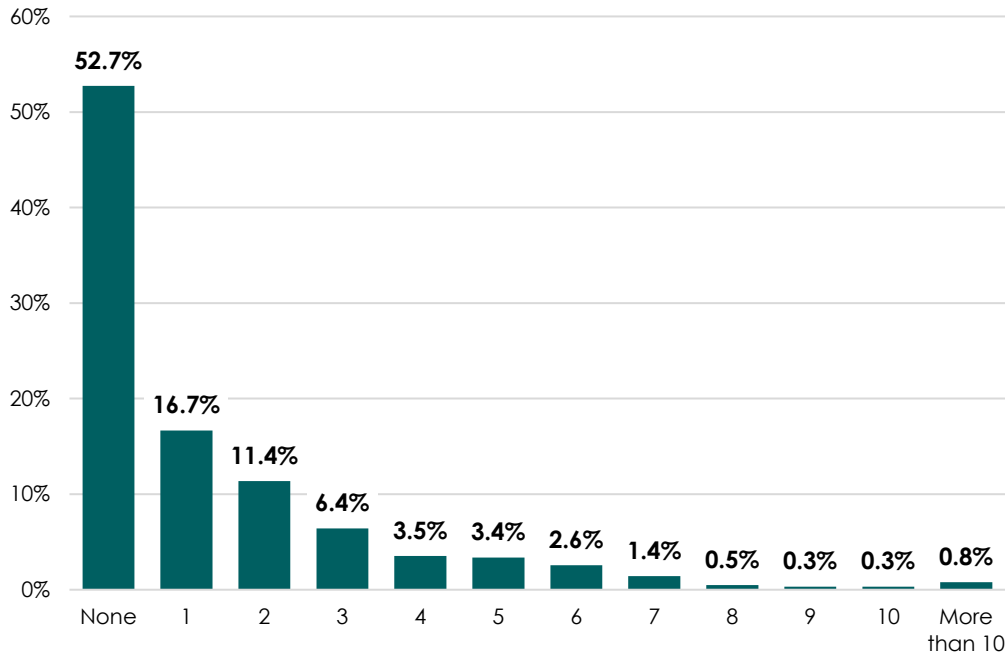


EXHIBIT 8. HOW MANY WALLA WALLA VALLEY WINE CLUBS DO YOU BELONG TO? (N = 624)



When asked about the attributes most commonly associated with Walla Walla, 72% cited the area’s charm, followed by “fun small town” (64%), “fine restaurants and food” (61%), and “offers great variety of wines worth trying” (60%) (**Exhibit 9**).

More than one in five (22.5%) of all respondents reported that 2022 was the first year they had visited Walla Walla for wine-related activities (N = 589). Another 10% indicated their first visit was in either 2020 or 2021, during the depths of the pandemic. More than a quarter of respondents visited only once, when surveyed, while 9% reported this was their second visit; the remaining 65% of respondents reported this was at least their second visit since their initial trip to the region for wine-related activities. One-third of respondents reported that they visit Walla Walla once per year for wine-related activities; 18% reported twice a year (N = 622).

EXHIBIT 9. MOST COMMONLY (> 50%) SELECTED ATTRIBUTES VISITORS ASSOCIATE WITH WALLA WALLA VALLEY (CHECK AS MANY AS APPLY)



IMPACTS OF THE PANDEMIC

Nearly two-thirds (60.4%) of respondents indicated that the pandemic did not affect how many times they visited the Walla Walla Valley for wine-related activities. Nearly three-quarters (74.3%) of respondents (N = 717) similarly indicated that their online purchases of Walla Walla wine remained unchanged compared to before the pandemic; 19.6% reported an increase in purchases, while the remainder (6.0%) reported a decrease.

WINE CONSUMPTION AND SPENDING

Nearly all respondents (N = 620) indicated they had spent money on wine purchases during their stay (98.6%). Other major expenses included food & beverage costs, excluding wine, tasting, and related expenses (87.6%), lodging and accommodation (84.4%), auto travel costs (83.6%), and wine tasting fees (81.3%). Nearly three-quarters (73.9%) of all respondents (N = 631) visited four or more wineries during their stay in the area (**Exhibit 11**).

EXHIBIT 10. FREQUENCY OF WINE CONSUMPTION BY PRICE SEGMENT (N = 626)

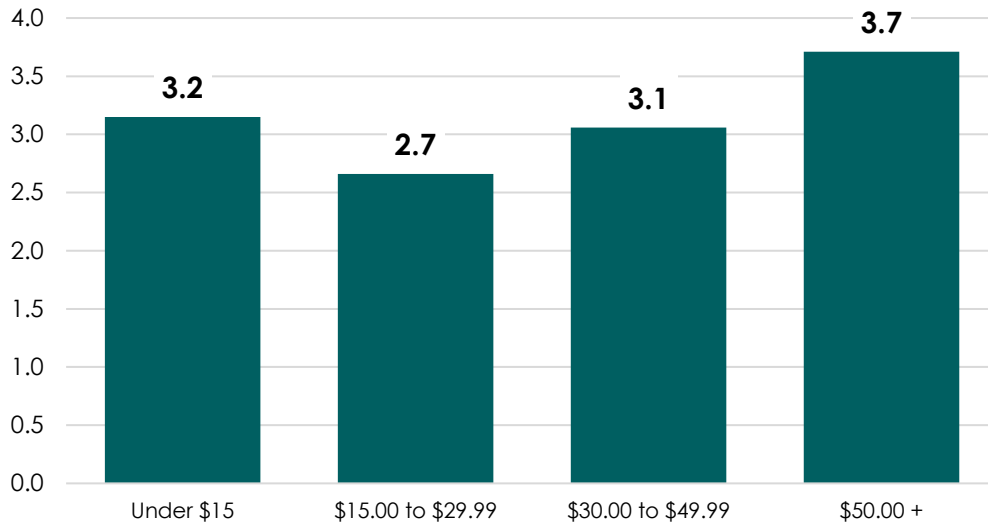


EXHIBIT 11. WINERY VISITS DURING STAY (N = 631)

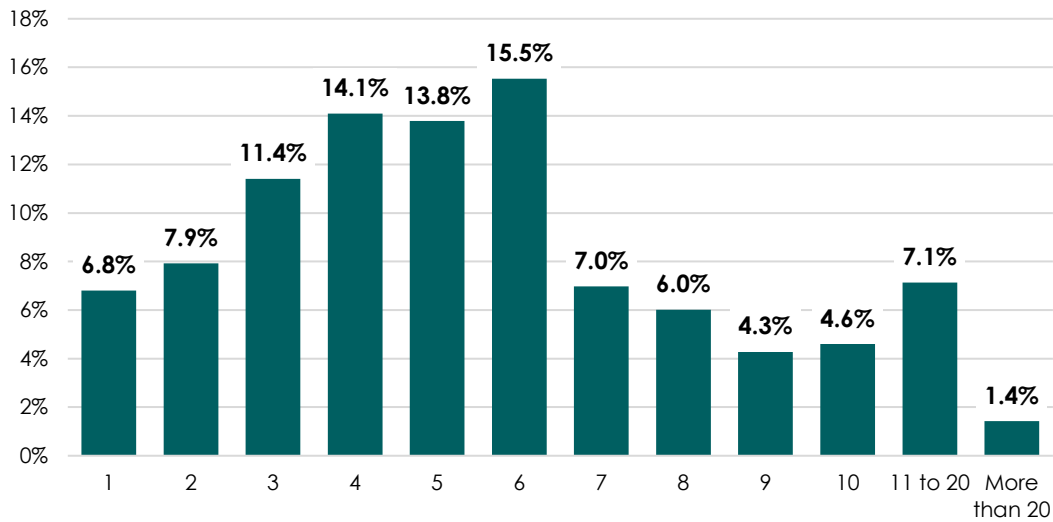
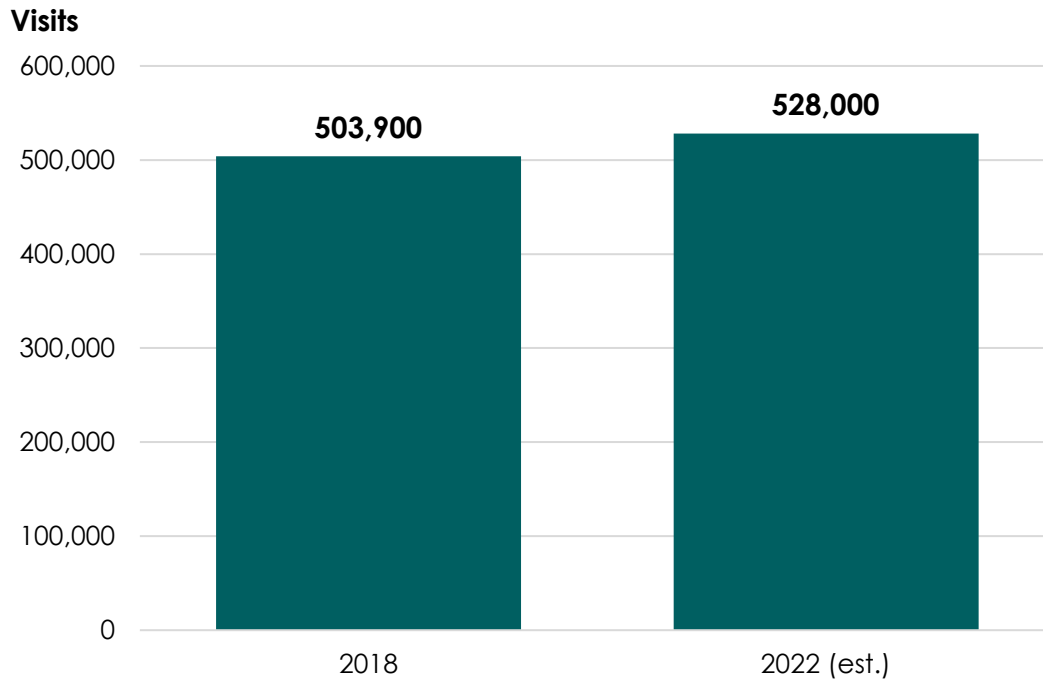


EXHIBIT 12. WINERY AND TASTING ROOM VISITS, ESTIMATED, 2018 AND 2022



Sources: Beyers & Morgan (2019); U.S. Bureau of Labor Statistics (2023); Washington State Liquor and Cannabis Board (2023).

EXHIBIT 13. ESTIMATED TOTAL SPENDING BY WALLA WALLA WINE TOURISTS, BY CATEGORY, 2022

Category	Spending (mils \$)	Share (%)
Wine purchases	\$75.5	29%
Lodging & accommodation costs	\$55.0	21%
Food & beverage costs (except wine tasting fees, wine events, and wine purchases)	\$36.5	14%
Air travel costs	\$20.4	8%
Auto travel costs (gas, rentals, electric charging)	\$18.1	7%
Shopping & Gifts (excluding wine)	\$16.5	6%
Wine Tasting Fees, including at wine tasting rooms not part of a winery	\$14.0	5%
Wine events, including winemaker dinner(s)	\$6.9	3%
Winery Tours	\$5.5	2%
Entertainment	\$4.7	2%
Other costs	\$7.2	3%
Total	\$260.4	100%

WINE PRODUCER AND SUPPLY CHAIN ACTIVITIES

According to data from the Washington State Liquor and Cannabis Board (LCB), there were 158 active winery licenses in Walla Walla County as of March 2023; an additional ten wineries operate in Milton-Freewater in Rocks District in Oregon. These wineries in 2022 generated an estimated \$248.0 million in sales and directly employed 990 workers with total earnings (wages & salaries plus value of benefits) of \$55.3 million (**Exhibit 14**).

EXHIBIT 14. ESTIMATED DIRECT ACTIVITIES, WALLA WALLA VALLEY WINERIES

Revenues (mils \$)	\$248.0
Employment (annualized)	990
Labor income (mils \$)	
Wages & salaries plus benefits	\$55.3

Sources: Washington State Liquor and Cannabis Board (2023); Washington State Employment Security Department (2023); Washington State Department of Revenue (2023).

Wineries surveyed for this study reported, on average, 30% of total sales coming from direct-to-consumer wine clubs, followed by wholesaling and direct-to-consumer sales on-premises at the winery (**Exhibit 15**).

EXHIBIT 15. SALES CHANNELS, WALLA WALLA VALLEY WINERIES

Sales Channel	Share of Sales
Direct-to-consumer wine club	30%
Wholesale sales under your label	28%
Direct-to-consumer at winery	24%
Direct-to-consumer online	7%
Tasting fees at winery	2%
Food sales	1%
Merchandise	1%
Sales of wine to other wineries (bulk, shiners, etc.)	1%
Grape sales	0%
Other sources	6%

WINE INDUSTRY ECONOMIC AND FISCAL IMPACTS

ECONOMIC IMPACTS

Wineries support additional jobs, income, and revenues across the economy through upstream business-to-business supply chain transactions (indirect effects) and household consumption expenditures among winery and supply chain workers (induced effects). The combined impact of these activities—direct, indirect, and induced—is the total economic impact of wine to the region.

In 2022, wine production activities in Walla Walla and Umatilla counties supported a total economic impact within the combined region of 1,680 jobs, \$92.4 million in labor income (including benefits), and \$365.9 million in business sales (**Exhibit 16**). The largest share of secondary impacts came through induced impacts, e.g., spending by winery employees at local grocery stores, restaurants, retail, gasoline, and various other household consumption expenditures; these activities supported 580 jobs and \$92.9 million in business sales.

Wine tourism, including spending on hotels, restaurants, souvenir shops, and other tourist itinerary expenses (less wine purchases from wineries, which are captured under wine production impacts), supported \$183.9 million in business sales and almost the same number of jobs (1,550) as wine production (**Exhibit 17**).

The total combined regional impact of wine production and wine tourism summed to 3,170 jobs, \$150.5 million in labor income, and \$537.8 million in business sales (**Exhibit 18**). Statewide, the Walla Walla wine industry supported 4,280 jobs, \$215.7 million in labor income, and \$731.1 million in business output.

EXHIBIT 16. ECONOMIC IMPACTS FROM WINE PRODUCTION, WALLA WALLA VALLEY WINE REGION, 2022

	Direct	Indirect	Induced	Total
Employment	990	660	290	1,940
Labor Income (mils \$)	\$55.3	\$30.4	\$17.8	\$103.5
Output (mils \$)	\$248.0	\$105.6	\$51.3	\$404.9

Sources: Washington State Office of Financial Management (2022); U.S. Bureau of Economic Analysis (2023); Washington State Department of Revenue (2023).

EXHIBIT 17. ECONOMIC IMPACTS FROM WINE TOURISM, WALLA WALLA VALLEY WINE REGION, 2022

	Direct	Indirect	Induced	Total
Employment	1,260	110	180	1,550
Labor Income (mils \$)	\$43.4	\$7.4	\$10.9	\$61.7
Output (mils \$)	\$127.7	\$24.9	\$31.3	\$183.9

Sources: Washington State Office of Financial Management (2022); U.S. Bureau of Economic Analysis (2023).

EXHIBIT 18. TOTAL ECONOMIC IMPACTS WINE PRODUCTION AND WINE TOURISM, WALLA WALLA VALLEY WINE REGION, 2022

	Direct	Indirect	Induced	Total
Employment	2,250	770	470	3,490
Labor Income (mils \$)	\$98.7	\$37.8	\$28.7	\$165.2
Output (mils \$)	\$375.7	\$130.5	\$82.6	\$588.9

Sources: Washington State Office of Financial Management (2022); U.S. Bureau of Economic Analysis (2023).

Estimated final demand from the wine industry in 2022, including wine production and wine tourism, was equal to 4.4% of total GDP across the two counties of Walla Walla and Umatilla (U.S. Bureau of Economic Analysis, 2023). The total economic impact of the regional wine industry in 2018 summed to \$430.3 million in output, 2,484 jobs, and \$114.1 million in labor income (Beyers & Morgan, 2019). The 2022 economics impacts thus represent a 40% increase in employment impacts, owing to the rapid increase in wine tourism during the pandemic and Walla Walla's continued ascent as a major wine destination.

FISCAL IMPACTS

Wine activities and associated spending support state and local tax revenues, which in turn help finance public services and investments. Visitors spent an estimated \$184.9 million on wine-related goods and services in Walla Walla County in 2022 (excluding wine purchases and air fare), of which an estimated \$149.2 million was spent in Walla Walla County.

In 2022, the Walla Walla wine industry supported an estimated \$26.1 million in state and local taxes. The largest segment was Washington state sales tax, generated by visitor spending on local goods and services, such as at restaurants; these tax impacts summed to \$13.3 million in state sales tax and \$4.9 million in local sales tax. Spending also generated \$1.0 million in the hotel tax. Walla Walla wineries and visitor spending-related businesses paid an estimated \$2.1 million in state business & occupation tax (B&O) in 2022.¹ Factoring in taxes generated through indirect and induced spending, the Walla Walla wine industry supported a total fiscal impact of \$26.1 million in 2022 (**Exhibit 19**).

¹ Walla Walla does not have a local B&O tax.

**EXHIBIT 19. FISCAL IMPACTS FROM WINE TOURISM AND WINE PRODUCTION,
WALLA WALLA COUNTY**

Tax Category	Amount (mils \$)
Washington State B&O	\$2.1
Washington State Sales Tax	\$13.3
Local Sales Tax	\$4.9
Hotel Tax	\$1.0
<i>Subtotal, Direct</i>	<i>\$21.3</i>
Indirect and Induced Statewide Taxes	\$4.8
Total	\$26.1

Sources: Washington State Office of Financial Management (2022); U.S. Bureau of Economic Analysis (2023); Washington State Department of Revenue (2023).

SUMMARY AND CONCLUSION

The Walla Walla wine industry is a major driver of economic development and growth in southeast Washington and northeast Oregon. The industry fosters broad-based economic growth through winery operations, visitor spending on wine-related tourism activities, and upstream supply chain transactions, such as the sale of grapes from growers to winemakers.

According to data from the Washington State Liquor and Cannabis Board (LCB), there were 158 active winery licenses in Walla Walla County as of March 2023; an additional ten wineries operate in Milton-Freewater in the Rocks District in Oregon. These wineries in 2022 generated an estimated \$248.0 million in sales and directly employed 990 workers with total earnings (wages & salaries plus value of benefits) of \$55.3 million.

In addition to wine production, the wine industry draws significant inflows of tourists to the Walla Walla region. In 2022, Walla Walla and Umatilla counties hosted an estimated 528,000 wine tourism visits with associated wine tourism spending of \$260.4 million. The largest single category of wine tourism spending was on wine itself, with an estimated \$75.5 million in outlays, followed by lodging and accommodations and food and beverage expenses, excluding wine tasting fees and other winery-based events.

This spending—in the form of winery sales and visitor tourism consumption—represents a net inflow of capital, or the equivalent of services-based regional exports, which are then re-spent throughout the economy through upstream business-to-business transactions and household consumption among workers supported through the wine industry. Combined, in 2022 these activities supported a total regional economic impact of nearly 3,500 jobs, \$165.2 in associated labor income, and \$588.9 million in business sales, or “output.” These impacts in turn supported \$26.1 million in state and local taxes in Washington state, including business & occupation taxes, sales tax, and hotel taxes.

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APPENDIX: DATA SOURCES AND METHODS

DATA SOURCES

The following data sources were used for this report:

- **U.S. Bureau of Labor Statistics.** QCEW data for Umatilla County and Walla Walla County.
- **U.S. Bureau of Economic Analysis.** County-level GDP and implicit price deflators.
- **U.S. Census Bureau.** Longitudinal Employer-Household Dynamics data series.
- **Washington State Department of Revenue.** Gross business income by North American Industry Classification System (NAICS) code statewide and taxable retail sales by county and local jurisdiction, also reported by NAICS code.
- **Washington State Employment Security Department.** Quarterly Census of Employment and Wages (QCEW) annual data for covered employees by county and statewide, by NAICS code, and custom data request for regional wineries based on unified business identifier (UBI) codes.
- **Washington State Liquor and Cannabis Control Board.** For winery licenses by name and location in Washington state.
- **Washington State Office of Financial Management.** The 2012 Washington State Input-Output Model was used to compute economic impacts.

METHODS

VISITOR SPENDING

Wine tourism spending was estimated based on a survey of wine tourists in 2023 conducted by GMA Consultants. The survey asked questions on total wine tourism budget, categories of spending, and duration of stay, as well as topics related to group size, wine consumption behavior, and other related issues. An estimated per visitor wine tourism budget was computed; extreme outliers were removed from the analysis.

Total winery and winery tasting room visits was computed by applying an estimated growth factor for taxable retail sales for wine tourism-related industries, e.g., hotels, adjusted for inflation, to estimated wine visits from the 2019 study (for year 2018). Total tourism spending was then estimated by applying per capita spending based on survey findings to total winery and tasting room visits.

WINE PRODUCTION DIRECT ACTIVITIES

A second survey was deployed to wine producers in the region. The survey solicited information on wine sales, payroll, distribution & sales channels, and related issues. This survey yielded 74 responses, or less than half of all wineries in the region (and not all responses were complete). To develop a complete estimate of winery jobs, labor income, and revenues for the entire region, additional estimates were made using data on covered

employment and gross business income for wineries in Washington state whose NAICS code fell under “312130 Wineries,” a custom data request for winery employment and wages² with the Washington State Employment Security Department for Walla Walla County wineries based on unified business identifier (UBI) codes, and Washington State Liquor and Cannabis Board net production data. Missing data for wineries in Umatilla County was estimated using regional industry averages.

TOTAL ECONOMIC IMPACTS

The Washington State Input-Output Model, published by the Washington State Office of Financial Management, served as the primary analytic tool for estimated total economic impacts, including additional jobs, income, and revenues supported through upstream business-to-business transactions (indirect impacts) and household consumption expenditures among workers at wineries, tasting rooms, wine tourism venues, and suppliers (induced impacts). Direct requirements estimates from the 2019 study were used in this analysis.

The Washington State Input-Output Model is a statewide model. To estimate local impacts, and to include Umatilla County, Oregon, the following adjustments were made:

- Location quotients were computed by I-O sector, with LQs less than 1 applied to direct requirements in the model. In this analysis, the same adjusters from the 2019 study—for both Walla Walla and Umatilla counties—were applied.
- Retention coefficients were computed by using the net change in inflow-outflow of workers from the two counties. Ratios less than 1 were applied to induced impacts by sector to account for spending leakage, e.g., household consumption that occurs in Washington but outside Walla Walla County.

² Not all wineries are classified in state and federal data as NAICS code 312130 (“Wineries”); some fall under NAICS codes for retail, wholesale, and other categories. Because of this, we developed a list of UBI codes for all wineries in Walla Walla County for aggregation by the Washington State Employment Security Department, drawing on data from the QCEW.