WOODINVILLE WINE COUNTRY

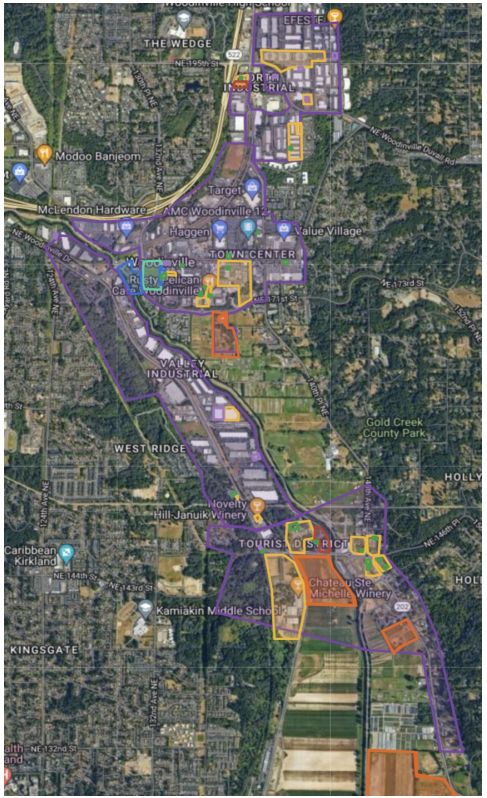
Tourism Insight
First Half 2023

(Woodinville Only)

Visitor Volume Estimator

Areas geofenced capture a sample size of devices and are statistically modeled to estimated visitor volumes.

WWC uses Datafy's **Caladan Model:** Caladan Model uses multiple sources of data including mobile device geolocation, automobile GPS, and spending transactions to produce a composite estimate with a projected 90% accuracy.



Destination Summary

Main Dates: 1/1/23 - 6/30/23

Compare Dates: 1/1/22 - 6/30/22

Visitor Volume Estimates

for Jan 1, 2023 - Jun 30, 2023

% ↑ / ↓ vs 1/01/22 - 6/30/22

Total Trips

7,179,493 Trips

↓ 2.1 %

Visitor Days

7,675,688 Days

↑ 1.4 %

Average Length of Stay

1.1 Days

– 0 Days

Annual Volume by Visitor Days*

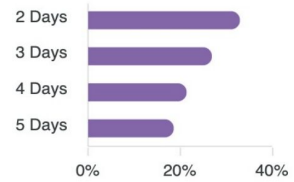
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
2018	-	860.8K	956.0K	795.8K	908.8K	957.8K	1.1M	1.1M	991.8K	1.1M	1.1M	1.2M
2019	919.6K	782.7K	1.1M	1.0M	1.1M	1.1M	1.3M	1.3M	1.2M	1.3M	1.3M	1.3M
2020	1.3M	1.2M	918.8K	716.5K	913.2K	1.1M	1.2M	1.2M	1.2M	1.3M	1.2M	1.0M
2021	1.0M	1.1M	1.3M	1.0M	1.0M	1.3M	1.2M	1.2M	1.3M	1.3M	1.1M	1.2M
2022	982.5K	1.3M	1.4M	1.3M	1.1M	1.4M	1.4M	1.5M	1.5M	1.6M	1.3M	1.6M
2023	1.1M	1.1M	1.4M	1.2M	1.3M	1.4M	1.2M	-	-	-	-	-

* only months with full data are displayed

Overnight Visitation % Share*

for Jan 1, 2023 - Jun 30, 2023

% ↑ / ↓ vs 1/01/22 - 6/30/22



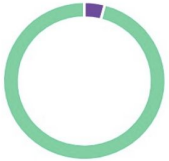
33%	↑ 2.4%
26.9%	↓ 1.4%
21.4%	↓ 1.2%
18.6%	↑ 0.2%

Percent of Visitors * 1 day visitors are removed

Locals vs. Visitors % Share

for Jan 1, 2023 - Jun 30, 2023

% ↑ / ↓ vs 1/01/22 - 6/30/22



Visitors 4.1 %
↓ 1.2 %

Locals 95.9%
↑ 1.2 %

Locals: 0 - 50 Miles | Visitors: 50 - 2750 Miles

Distance filter is not applied to this chart

Destination Summary

Top Geolocation Markets

for 1/01/23 - 6/30/23 %↑/↓1/01/22 - 6/30/22

MSA	% Trip Share	Total Trips	% Trip Change
Seattle-Ta...	97.8%	7,243,252	↓ 0.2%
Bremerton...	0.2%	17,531	– 0%
Oak Harbo...	0.2%	14,519	– 0%
Mount Ver...	0.2%	11,462	– 0%
Portland-...	0.1%	7,056	↓ 0.1%
Olympia, ...	0.1%	5,923	– 0%
Bellingha...	0.1%	5,761	↓ 0.1%
Spokane, ...	0%	3,595	↓ 0.1%
Wenatche...	0%	3,488	– 0%
Los Angel...	0%	3,265	– 0%

Top Spending by Destination *

for 1/01/23 - 6/30/23 %↑/↓1/01/22 - 6/30/22

MSA	% Spend Share	% Share Spend Change
Seattle-Tacom...	93.5%	– 0%
Bellingham, WA	0.3%	– 0%
Portland-Vanc...	0.3%	– 0%
Riverside-San ...	0.3%	–
Mount Vernon...	0.3%	↑ 0.1%
Los Angeles-L...	0.3%	– 0%
Wenatchee, WA	0.2%	– 0%
Spokane, WA	0.2%	– 0%
Olympia, WA	0.2%	– 0%
Bremerton-Sil...	0.2%	– 0%

Top Clusters

for 1/01/23 - 6/30/23 %↑/↓1/01/22 - 6/30/22

Cluster	% Trip Share	% Trip Change
WWC Service A...	99.5%	↑ 0.1%
Wineries	25.3%	↓ 1.3%
Restaurants	5%	– 0%
Sports & Outd...	3.5%	↓ 0.3%
Event Areas	1.9%	↓ 0.3%
Shopping & Ac...	1.5%	↑ 0.3%
Breweries & Di...	1.3%	– 0%
Lodging	1.1%	↓ 0.2%

Visiting Trends to Destination: Q1 & Q2 - 2023

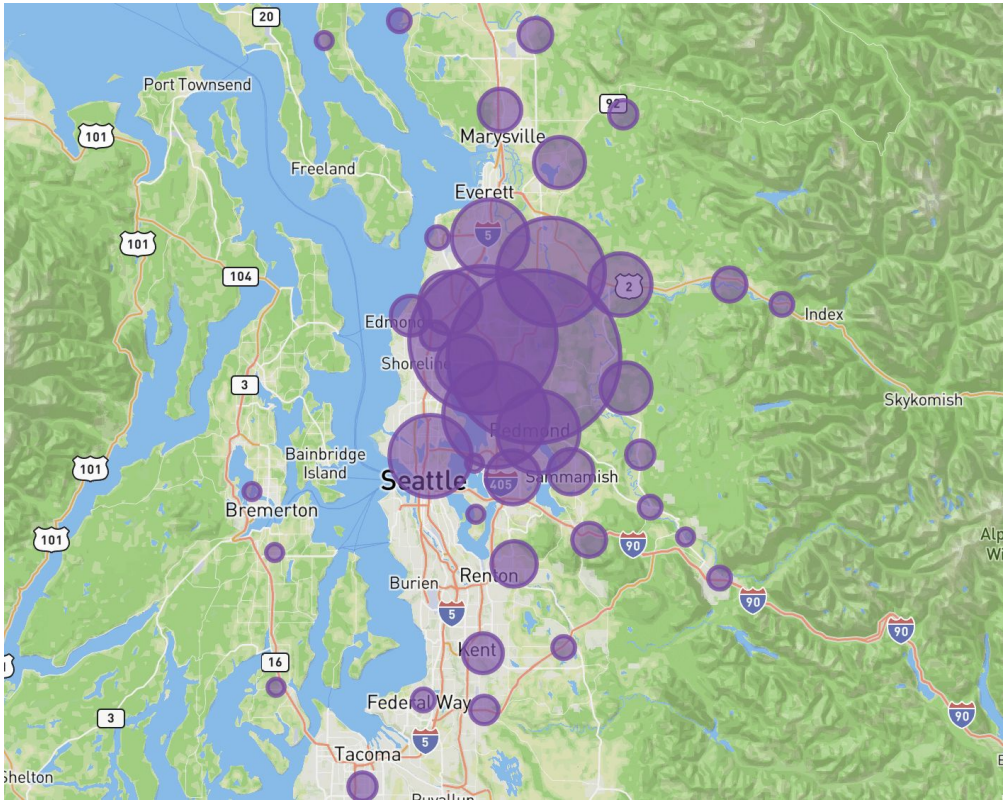
Visitors from 0 - 50 Miles

- In Q1 & Q2 2023, we see an increase in visitation compared to Q1 & Q2 2022
- With average length of stay holding at a 1 day trip.
- 63% of the Unique Visitors come from within 10 miles with that same group making up 77.6% of the local Visitor Days.

Overview : 1/1/23 - 6/30/23

Total Trips	Visitor Days
7,348,023 Trips	**7,352,886 Days**
↑ 1.6% vs. 1/1/22 - 6/30/22	↑ 1.6% vs. 1/1/22 - 6/30/22

Average Length of Stay	Unique Visitors
1 Days	**761,680 Visitors**
— 0.0% vs. 1/1/22 - 6/30/22	↑ 131.1 % vs. 1/1/22 - 6/30/22



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Areas geofenced capture a sample size of devices and are statistically modeled to estimated visitor volumes. Visitation to Destination..

Top Markets - % Trip Share to Destination: Q1 & Q2

Visitors from 10+ Miles

Top Demographics

	2019	2020	2022	2023
1	Seattle-Tac... **93.51%**	Seattle-Tac... **95.11%**	Seattle-Tac... **95.31%**	Seattle-Tac... **99.84%**
2	Portland- OR **0.86%**	Spokane **0.71%**	Portland- OR **0.74%**	Portland- OR **0.51%**
3	Spokane **0.64%**	Portland- OR **0.62%**	Spokane **0.5%**	Spokane **0.41%**
4	Yakima-Pas... **0.53%**	Yakima-Pas... **0.61%**	Yakima-Pas... **0.48%**	Yakima-Pas... **0.33%**
5	Los Angeles **0.38%**	Los Angeles **0.25%**	Los Angeles **0.18%**	Los Angeles **0.21%**
6	Phoenix -Pr... **0.28%**	Phoenix -Pr... **0.19%**	Phoenix -Pr... **0.13%**	Phoenix -Pr... **0.16%**

Source:

Areas geofenced capture a sample size of devices and are statistically modeled to estimated visitor volumes. Visitation to Destination..

Visitation Snapshot 50+ miles (MSA)

Top Visitation Markets

1. Portland/Vancouver /Beaverton, OR-WA
2. Olympia, WA
3. Bellingham, WA

Top Spending Markets

1. Bellingham, WA
2. Los Angeles/Long Beach, CA
3. Portland/Vancouver /Beaverton, OR-WA

Average Length of Stay

Destination: 3 Days

↑ 11.1% vs. 1/1/22 - 6/30/22

Peak Visitation

Primary: June
Secondary: May

Top Vehicle Markets

1. Portland/Vancouver /Beaverton, OR-WA
2. Olympia, WA
3. Bellingham, WA

Top Attractions

1. Ste. Michelle
2. Hollywood Vineyards
3. Apple Farm & Hollywood Station

Household Demographics

- **Top age group: 45 - 64: 32%**
- **Top Income Level: $100k+: 37.8%**
- **Top Household Group: 1 - 2: 52%**

Source:

Areas geofenced capture a sample size of devices and are statistically modeled to estimated visitor volumes. Visitation to Destination..

Top Markets 50+ miles (MSA)

MSA	Trips Share 1/1/2023 - 6/30/2023	Change of Trip Share vs 1/1/2022 - 6/30/2022	Total Trips % Change vs 1/1/2022 - 6/30/2022
Portland-Va	5.6%	− 4.3	↓ 37.1 %
Olympia, W/	4.7%	− 3.0	↓ 32.4 %
Bellingham,	4.57 %	− 5.7	↓ 50.6%
Mount Vern	3.93 %	− 0.5	↓ 0.8%
Spokane, W.	2.85%	− 0.5	↓ 6.4%
Wenatchee,	2.77 %	− 0.4	↓ 1.8%
Los Angeles	2.59%	+ 0.1	↑ 17.6 %

Geolocation

MSA	Spend Share 1/1/2023 - 5/31/2023	Change of Spend Share vs 1/1/2022 - 6/30/2022
Bellingham, WA	4.86%	+ 0.1
Los Angeles-Lon	4.19 %	+ 0.1
Portland-Vancou	4.09%	− 0.1
Riverside-San B	4%	+ 2.8
Wenatchee, WA	3.08%	− 0.1
Olympia, WA	2.96%	+ 0.2
Spokane, WA	2.51 %	− 0.4

Spending

Vehicle Top MSAs

MSA	% of Vehicle Days
Portland-Vancouver-Beaverton, OR-WA	12.94 %
Olympia, WA	8.85%
Bellingham, WA	8.78 %
Mount Vernon-Anacortes, WA	7.06 %
Wenatchee, WA	6.51 %
Ellensburg, WA	6.33%
Seattle-Tacoma-Bellevue, WA	6.21 %
Spokane, WA	4.17 %
Yakima, WA	4.16 %
Rural Washington	3.72 %

Vehicle

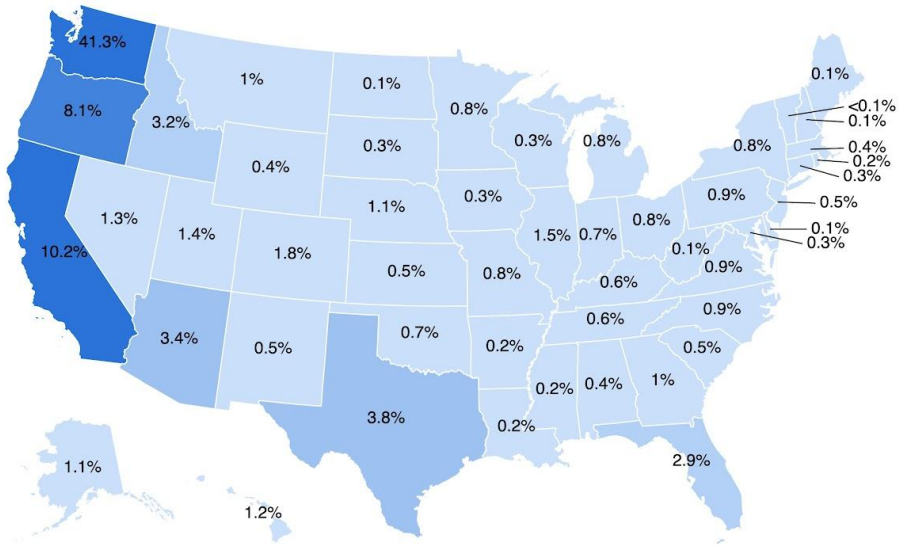
POI	Trips Share 1/1/2023 - 6/30/2023	Change of Trips Share vs 1/1/2022 - 6/30/2022
Downtown Distr	58.89%	− 0.8
Hollywood Distr	48.3%	+ 0.3
West Valley Dist	21.24 %	− 0.5
Warehouse Distr	18.46 %	+ 3.3
Ste. Michelle	17.98 %	+ 1.7
Hollywood Viney	9.39 %	+ 3.1
Woodinville Hot	9.34 %	+ 2.1

POI

Visiting Trends to Destination: Q1 & Q2 - 2023

Visitors from 50+ Miles

- In Q1 & Q2 2023, we see a decrease in visitation compared to Q1 & Q2 2022
- With a increase in average length of stay.



Overview : 1/1/23 - 6/30/23

Total Trips
106,470 Trips
↓ -31.8 % vs. 1/1/22 - 6/30/22

Visitor Days
328,544 Days
↓ -22.6 % vs. 1/1/22 - 6/30/22

Average Length of Stay
3.1 Days
↑ 14.8 % vs. 1/1/22 - 6/30/22

Unique Visitors
82,500 Visitors
↓ -17.2 % vs. 1/1/22 - 6/30/22

Source:

Areas geofenced capture a sample size of devices and are statistically modeled to estimated visitor volumes. Visitation to Destination..

Who are our visitors?

Visitors from 50+ Miles

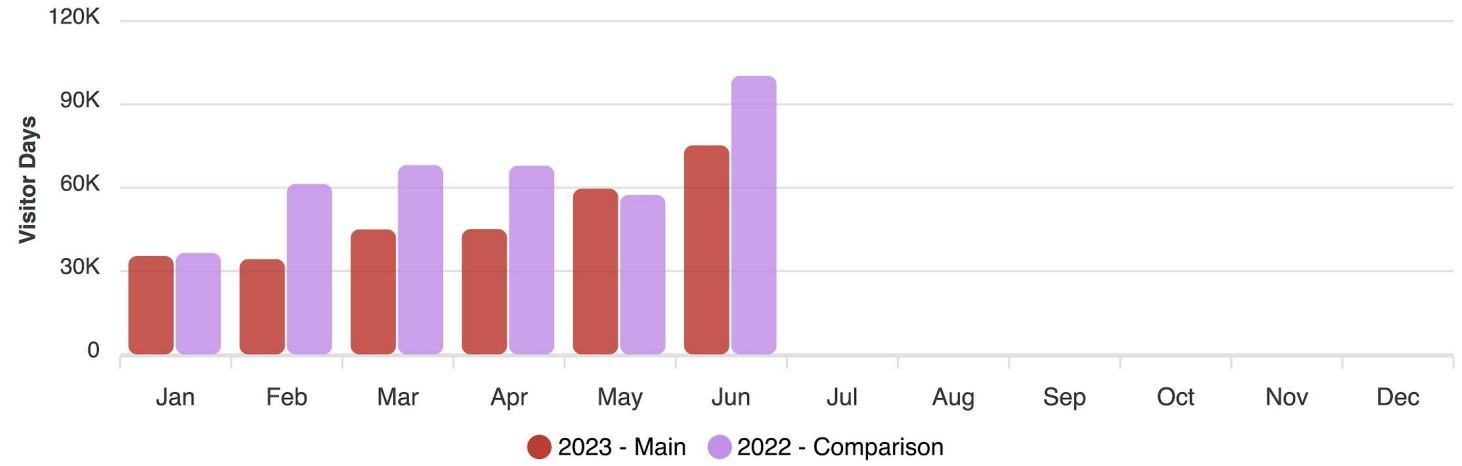
Demographic and Behavioral Details

1. Known Traveler
   Frequent Traveler to destinations at least 50 miles from home
2. Age 35+
3. Couples
4. Wine Interest
5. Shopping Interest
   Shops at boutique shops or malls
6. HHI $100+

Top Demographics for 1/1/2023 - 6/30/2023

Source: © Datafy - All Rights Reserved

Areas geofenced capture a sample size of devices and are statistically modeled to estimated visitor volumes. Visitation to Destination..



	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
2023	35.4K	34.3K	45.0K	45.1K	59.6K	75.2K	0	0	0	0	0	0
2022	36.5K	61.4K	68.1K	67.9K	57.4K	100.3K	0	0	0	0	0	0

Visitor Volume Estimates: Q1 & Q2

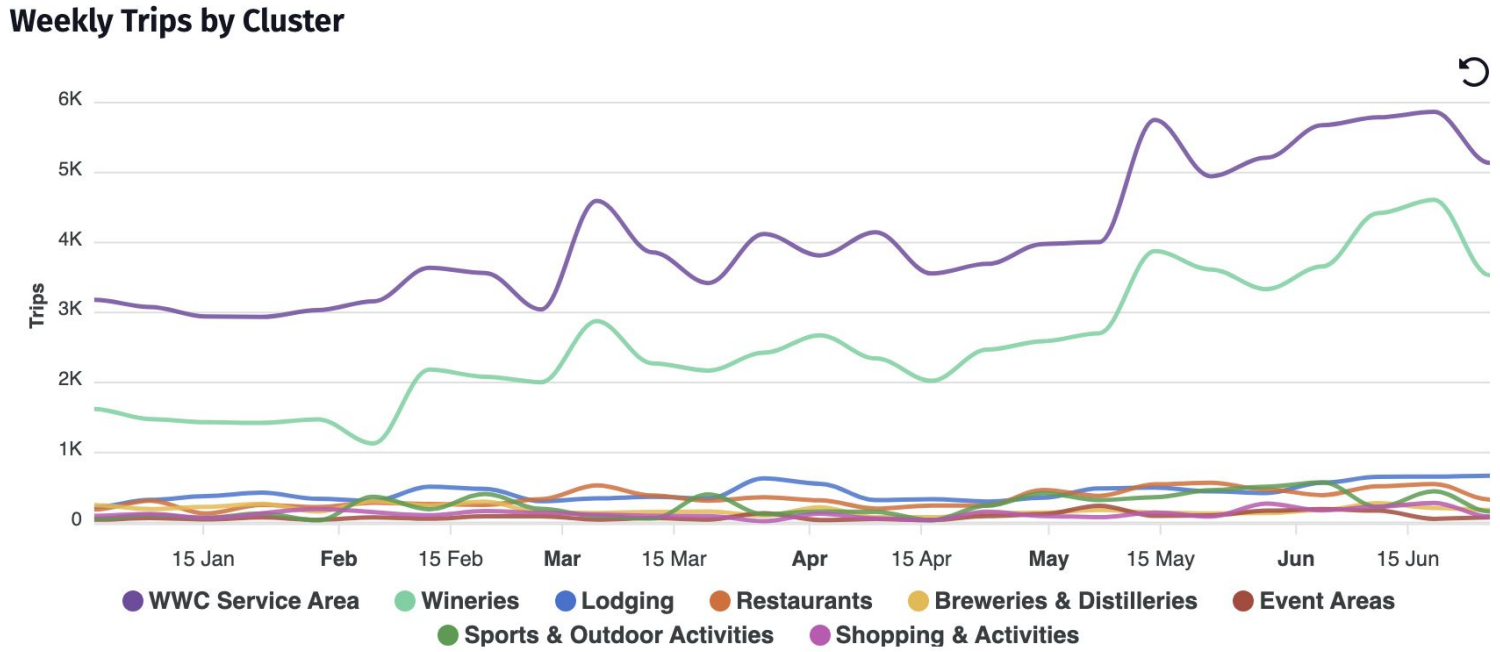
Visitors from 50+ Miles

Source:

Areas geofenced capture a sample size of devices and are statistically modeled to estimated visitor volumes. Visitation to Destination..

Where did visitors that went during their trip?

Visitors from 50+ Miles

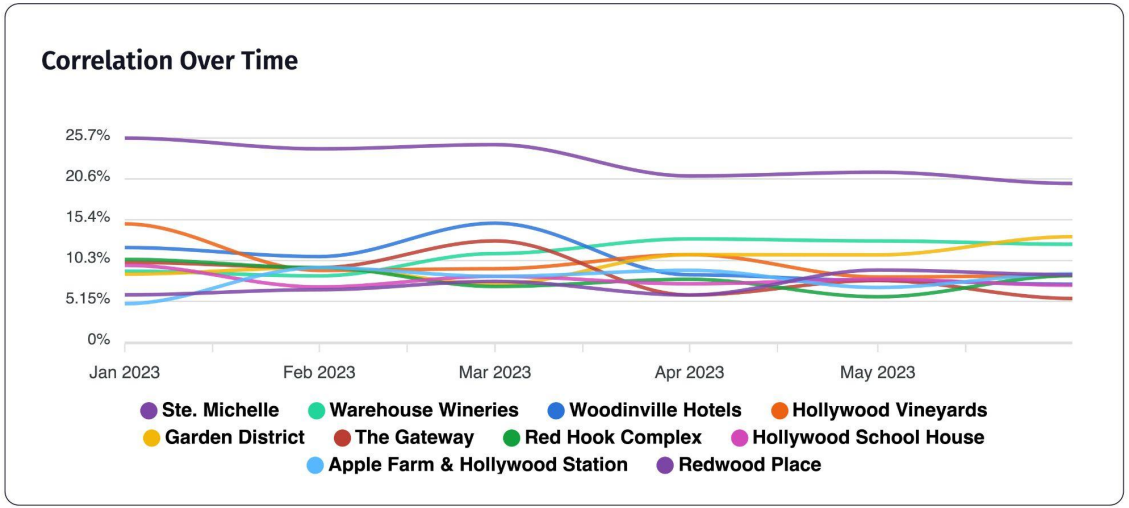


Source:

Areas geofenced capture a sample size of devices and are statistically modeled to estimated visitor volumes. Visitation to Destination..

Winery Visitor Correlation 50+ miles visitors

Reference Level	Reference Value	Comparison Level	Method
Cluster	Wineries	POI	Same Trip



We continue to see Ste. Michelle serving as the focal point for almost a quarter of the winery related tourists coming into Woodinville. With the original Warehouse Wineries being the second focal point

Winery Tasting Room Insights

Tasting Room Stats

	Woodinville	WA
JUNE 2023	674	512
JUNE 2022	725	661
% +-	-7.1 %	-22.6 %
YTD 2023	3,769	2,104
YTD 2022	4,225	2,623
% +-	-10.8 %	-19.8 %

Visitors

	Woodinville	WA
JUNE 2023	76.9 %	71.6 %
JUNE 2022	70.8 %	67.5 %
% +-	8.7 %	6.1 %
YTD 2023	71.6 %	72.1 %
YTD 2022	73 %	65.9 %
% +-	-1.9 %	9.4 %

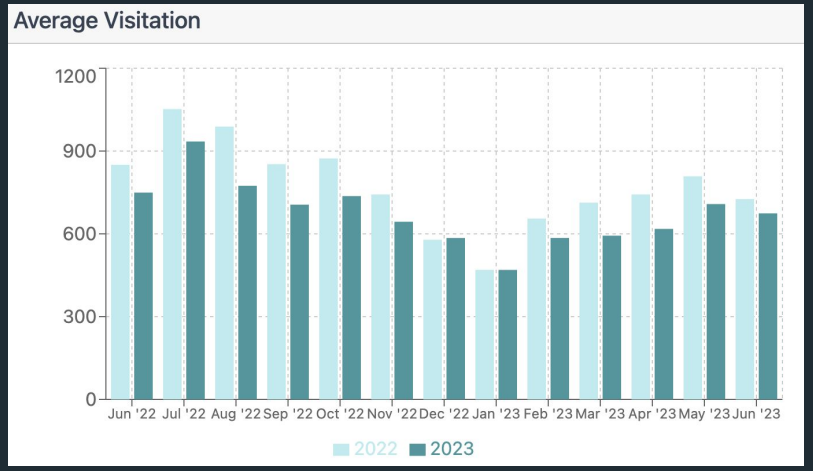
Purchase Conversion

	Woodinville	WA
JUNE 2023	$83	$99
JUNE 2022	$84	$95
% +-	-0.8 %	4.3 %
YTD 2023	$83	$101
YTD 2022	$81	$99
% +-	2.5 %	1.5 %

Sales/Purchase(AOV)

Community Benchmark Data based on averages from 39 Tasting Rooms

Tasting Room Stats Continued.



Community Benchmark Data based on averages from 39 Tasting Rooms

We continue to see common trends in our seasonality year over year with peak season coming in the months of July and August. So while the overall volume has been slightly down in 2023 compared to 2022. There is a good chance for us to make up the roughly -10% difference in the end of Q2.

Data Definitions

Data Definitions

Data may change as new data is delivered throughout the year. Know that every effort is made to ensure the accuracy of the data provided. That said, mistakes can occur. Please notify your Datafy contact with any questions that arise.

Census Demographics - Calculated using the Home Zip Code of the Unique Device, and then matching the zip code to the corresponding data from the US Census and American Community Survey (ACS).

Cluster - A grouping of POIs based on venue type, visit purpose, etc.

Distance Filter Calculated as the distance between the center point of a POI and the center point of a device's Home Zip Code. This is a dynamic filter that allows real-time adjustments and flexibility to segment Visitors, Visitor Days, and Trips based on the distance between home location, and the POI. Calculated as flight distance, not drive distance.

Home Zip Code - The inferred home zip code of observed devices. This is determined by a history of observations and patterns of behavior. Our database includes home zip codes for more than 200 million devices. Home Zip Codes are updated monthly based on the historical pattern of behavior, and our process is capable of determining when someone moves to a new zip code.

Household Level Demographics - Calculated based on a positive match between a device and a household with a demographic profile. For example, if a college student lives at home with a parent and visits an attraction, then the household profile would report the income, education levels, and age brackets of everyone in the household, including the parent. These are aggregated, weighted, and averaged across all the household members and all of the POIs visited and dates observed within the selected filters. Most of the values reported are at the household level, with a few exceptions that are device-level.

Number of Trips - The number of distinct trips to a destination by a distinct Visitor. Utilizes a combination of observation patterns, distance traveled, etc. For example, if a Visitor visits on Thursday through Sunday, that would be considered one single trip. If the visitor returns later that month, it would be counted as a second trip.

Point of Interest (POI) - A physical boundary drawn on a map and utilized to capture mobile device activity within the boundary.

Data Definitions

Data Definitions Continued

Data may change as new data is delivered throughout the year. Know that every effort is made to ensure the accuracy of the data provided. That said, mistakes can occur. Please notify your Datafy contact with any questions that arise.

Repeat vs One Time Visitors - A calculation of repeat Visitors based on observations of Unique Devices and Trips taken within the selected time frame. Once a Unique Device is observed a second time at any of the selected POIs across the date range in the filters, then that device is "flagged" as a repeat visitor. This analysis is dynamic and can span multiple years. For example, if a Visitor visits in March 2020, they would contribute to the yellow line in the chart if the date range covers March 2020. If that Visitor returns and visits again in September of 2021 and the date range in the filters spans March 2020 through September 2021, then that Visitor shifts from a one-time visitor, to a repeat visitor for all of the observations. Therefore, now this Visitor would contribute to the purple line in both March and September and any subsequent visits.

Trips - The number of distinct trips to a destination by a Visitor or POI. Utilizes a combination of observation patterns, distance traveled, etc. For example, if a Visitor visits on Thursday through Sunday, that would be considered one single trip. If the visitor returns later that month, it would be counted as a second trip.

Unique Device - A unique mobile device determined by unique identifiers.

Visitors - An estimate of the number of visitors to a given POI or Cluster of POIs that factors in logic for Trips. For example, if one visitor visited the same attraction three days in a row, they would count as three Visitor Days, but only one Visitor. If that same visitor returned one month later and was observed at that same attraction for three more days in a row, then the cumulative results would be 6 Visitor Days, 2 Visitors, and 2 Trips.

Visitor Days - An estimate of the number of Visitors to a given POI or Cluster of POIs based on our proprietary volume estimate methodology. The Visitor Days calculation uses Unique Device identifiers as a baseline, and a daily estimate is generated factoring in many points of data including year-over-year changes in mobile device data availability, device behavior, local factors, unique POI characteristics, etc. The daily estimate is added up for whichever date range is selected by the filters.

Trip Length - The number of distinct trips to a destination by a Visitor or POI. Utilizes a combination of observation patterns, distance traveled, etc. For example, if a Visitor visits on Thursday through Sunday, that would be considered one single trip. If the visitor returns later that month, it would be counted as a second trip.

Our Zip Code vs Postal Zip Code - The inferred home zip code of observed devices. This is determined by a history of observations and patterns of behavior. Our database includes home zip codes for more than 200 million devices. Home Zip Codes are updated monthly based on the historical pattern of behavior, and our process is capable of determining when someone moves to a new zip code.

Strengths of Data Sources

Vehicle Data

- Large cross section of vehicles currently operating in U.S.
- Evenly distributed with population density
- Consistent sample across dates/trips
- Not dependent on big tech

Geolocation Data

- Lots of historical data as reference to adjust for technological changes
- Normalized at relevant levels
- Custom filtering
- Precise origin data

Challenges with Individual Data Sources

Geolocation Data

- Dependent upon area geofenced, probability of sample pick up
- Recent volatility due to changes in the tech ecosystem

Vehicle Data

- Skewed towards newer vehicles, but accounted for in modeling

WOODINVILLE WINE COUNTRY