



AUGUST 11, 2022

Oregon Wine Board Meeting Agenda

Virtual [Zoom Link](#)

Time	Topic	Documents	Leader
9:00 – 9:45 a.m.	Executive Session <ul style="list-style-type: none"> Conflict of Interest Policy 		J. King
10:00 a.m.	Public Board Meeting Opening		J. King
10:00 – 10:30 a.m. (30 minutes)	Matters for Decision <ul style="list-style-type: none"> Approve Jun. 9 Board meeting minutes Approve Jun. 29 Executive Session meeting minutes Finance Committee <ul style="list-style-type: none"> Final year-end 2021-22 Balance Sheet and P&L Value Network Analysis 	<ul style="list-style-type: none"> DRAFT Board meeting minutes from Jun. 9 DRAFT minutes from Exec. Session Jun. 29 	J. King M. Chambers D. O'Donoghue
10:30a.m. – 12:30 p.m. (2 hours)	Matters for Discussion <ul style="list-style-type: none"> OWA Presentation (40 min.) <ul style="list-style-type: none"> Outlook for the 2023 Legislative Session Education Committee (30 min.) <ul style="list-style-type: none"> OWS 2023 <ul style="list-style-type: none"> DoJ Assessment OWB Strategic Review (30 min.) <ul style="list-style-type: none"> Scope, Timing, and Budget International Marketing Update (20 min.) 		J. McKamey B. Gruber J. King M. Chambers J. King B. Morus

ATTENDEES

Board

Justin King, Bob Morus, Donna Morris, Dennis O'Donohue, Tiquette Bramlett, Cristina Gonzales, Greg Jones

Absent

Jason Tosch, Eugenia Keegan

Staff

Tom Danowski, Marie Chambers, Bree Stock, Sarah Murdoch, David DeWitt, Neil Ferguson, Stacey Kohler

Guests

Jana McKamey & Brian Gruber (OWA), Elisa Ford & Julie Pond (NWCSF)



JUNE 9, 2022

Board meeting minutes **DRAFT**

[Recording Link](#)

ATTENDEES

Board

Justin King, Donna Morris, Dennis O'Donoghue, Jason Tosch, Tiquette Bramlett, Cristina Gonzales, Greg Jones

Absent

Bob Morus, Eugenia Keegan (designated Donna Morris as her proxy)

Staff

Tom Danowski, Marie Chambers, David DeWitt, Neil Ferguson, Stacey Kohler, Bree Stock

Guests

Glenda Turner & Albie Beannacht (Value Network Analysis consultants), Robert Hansen (WWVWA), Cody Copp (OSU)

MEETING OPENING

- Chair J. King called the Oregon Wine Board public meeting to order at 10:11 a.m.

MATTERS FOR DECISION

Review of meeting minutes

The Board reviewed the minutes from the April 21 Board meeting.

- **MOTION:** D. O'Donoghue moved that the April 21 meeting minutes be approved as submitted. J. Tosch seconded. The motion carried 8-0.

The Board reviewed the minutes from the May 13 Board meeting.

- **MOTION:** D. O'Donoghue moved that the May 13 meeting minutes be approved as submitted. D. Morris seconded. The motion carried 8-0.

Finance Committee

- **MOTION:** D. Morris motioned to approve an OWB employee retirement savings plan starting July 1, 2022, that will match 3% of each participating employee's contribution up to \$6,000 annually. D. O'Donoghue seconded. The motion carried 8-0.



Research Committee

Research Committee Chair J. Tosch updated the Board on the 2022-23 final V&E research payroll.

- **MOTION:** D. O'Donoghue moved to approve funding of the seven recommended research projects totaling \$359,409. T. Bramlett seconded. The motion carried 8-0.
- **MOTION:** D. O'Donoghue moved to approve a total research budget of \$415,549, including \$56,140 in unallocated funds to be held for research until the committee proposes additional projects for Board approval. J. Tosch seconded. The motion carried 8-0.

MATTERS FOR DISCUSSION

Marketing Update

D. DeWitt gave an Oregon Wine Month recap presentation.

- An Oregon Wine Month recap meeting focused on sales through the three-tier system is scheduled for July 12.
 - Management from national and in-state wholesale partners, retail managers, and select industry members have been invited.

Consultants Glenda Turner & Albie Beannacht presented an introduction to Value Network Analysis.

- The Board took no action related to a possible \$9,000, 2-day workshop for OWB staff and Board.
- Since consultant fees are not budgeted for 2022-23, potential VNA costs would be considered by the Board as new spending commitments.

Education Update

B. Stock shared that the Education Committee has been working on planning and programming for the 2023 Oregon Wine Symposium as an in-person event in Portland, February 14-15, 2023.

- On May 13, the Board adopted a motion to approve the pro forma budget for OWS 2023 with direction to the Dept. of Justice to begin drafting a joint venture agreement between OWB and OWA.

2023 Legislative Session Requests

OWB will invite the OWA and OWC to both attend the August 11 Board meeting to discuss the 2023 legislative session and provide their assessments of proposals and issues that may affect Oregon's wine industry.



MEETING FINALIZATION

- Chair J. King adjourned the Oregon Wine Board public meeting at 11:30 a.m.

JUNE 9, 2022

Executive Session

9 – 10 a.m.

The Oregon Wine Board Directors met in Executive Session and discussed OWB management performance reviews, potential conflict of interest, and a potential employee retirement savings plan.



JUNE 29, 2022

Executive Session meeting minutes **DRAFT**

ATTENDEES

Board

Justin King, Bob Morus, Donna Morris, Dennis O'Donoghue, Eugenia Keegan, Jason Tosch, Tiquette Bramlett, Greg Jones

Absent

Cristina Gonzales

Executive Session

10 – 11 a.m.

The Oregon Wine Board Directors met in Executive Session to complete the OWB Executive Director and Staff annual review process. Directors also engaged in a discussion of an OWB Strategic Plan review including a Value Network Analysis.

BALANCE SHEET
FISCAL YEAR 2021-22
REPORTED AS OF JUNE 2021
PRO-FORMA REPORT

OREGON WINE BOARD

	Jun-22	Prior Year End
ASSETS		
Current Assets		
Checking/Savings		
1000 · Umpqua Bank Checking	883,959	497,866
1050 · Umpqua Bank Money Market	548,962	648,902
1055 · Escrow		-
Total Checking/Savings	1,432,921	1,146,768
Total Accounts Receivable	158,302	51,146
Total Other Current Assets	-	-
Total Current Assets	1,591,222	1,197,914
Total Other Assets	-	34,809
TOTAL ASSETS	1,591,222	1,232,723
LIABILITIES & EQUITY		
Liabilities		
Current Liabilities		
Accounts Payable		
OLCC Overpayment	-	-
2000 · Accounts Payable	159,550	141,750
Total Accounts Payable	159,550	141,750
Credit Cards		
Credit Card 9737 AP	(36,157)	17,445
Total Credit Cards	(36,157)	17,445
Other Current Liabilities		
2120 · Accrued PTO Balance	57,159	57,159
2101 · Payroll Liabilities	4,386	4,511
2200 · Deferred Revenue	55,956	63,157
Total Other Current Liabilities	117,501	124,826
Total Current Liabilities	240,894	284,021
Total Liabilities	240,894	284,021
Equity		
3000 · Opening Bal Equity	13,493	13,493
3900 · Retained Earnings	935,209	1,137,357
Net Income	401,626	(202,148)
Total Equity	1,350,328	948,702
TOTAL LIABILITIES & EQUITY	1,591,222	1,232,723

PROFIT LOSS STATEMENT WITH BUDGET TO ACTUAL
FISCAL YEAR 2021-22
REPORTED AS OF JUNE 2022
PRO-FORMA REPORT

OREGON WINE BOARD

Modified Accrual	Annual Budget	Year to Date			Year End Forecast	Prior Year End
		Income & Expenses	Budget Earned	Budget Variance		
INCOME						
4100 · Grape Assessment (\$25/ton)	1,883,975	2,043,803	1,883,975	159,828	2,043,803	1,681,904
4200 · Wine Tax (2c/gal)	310,145	352,194	310,145	42,049	352,194	328,641
4300 · Program Revenue	-	-	-	-	-	(36,825)
4310 · Symposium Revenue	150,000	104,000	150,000	(46,000)	104,000	112,326
4500 · Other Income	2,000	51	2,000	(1,949)	51	2,049
4600 · Grant Revenue	133,500	133,750	133,500	250	133,750	58,163
4690 · HB 5006 Funds (MARIS)	-	-	-	-	-	40,000
TOTAL INCOME	2,479,620	2,633,798	2,479,620	154,178	2,633,798	2,186,258
EXPENSE						
1R000 · Research.						
R100 · Vit & Enological Research	330,000	244,479	330,000	85,522	244,479	381,067
R800 · Research. Administration	11,000	7,707	11,000	3,293	7,707	5,344
R900 · Research.Employee Compensation	42,381	23,297	42,381	19,084	23,297	39,220
1R000 · Research.	383,381	275,482	383,381	107,899	275,483	425,631
2E000 · Education.						
E100 · Symposium	150,000	115,924	150,000	34,076	115,925	96,683
E200 · Education Projects	100,500	87,750	100,500	12,750	87,750	3,320
E300 · Trade Education	-	-	-	-	-	-
E800 · Education.Administration	4,000	6,232	4,000	(2,232)	6,232	6,003
E900 · Education.Employee Compensation	107,783	119,602	107,783	(11,819)	119,602	60,268
2E000 · Education.	362,283	329,509	362,283	32,774	329,509	166,274
3M000 · Marketing & Communications						
B000 · Brand Equity & Identity	143,000	113,415	143,000	(5,415)	113,416	108,566
T000 · Tourism	115,000	66,275	115,000	48,725	66,275	128,177
X000 · Market Expansion	230,000	205,319	230,000	24,681	205,319	170,296
C000 · Communications	193,380	170,646	193,380	22,734	170,646	179,458
M800 · Marketing.Administration	9,000	3,311	9,000	5,689	3,311	5,328
M900 · Marketing.Employee Compensation	171,771	168,737	171,771	3,035	168,737	188,719
3M000 · Marketing & Communications	862,151	727,704	862,151	99,447	727,704	780,545
4K000 · Knowledge & Insights						
R200 · Industry Research	72,000	72,000	72,000	-	72,000	100,710
M300 · Marketing Research	30,000	4,150	30,000	25,850	4,150	7,519
K900 · Employee Compensation	56,508	23,296	56,508	33,212	23,296	39,221
4K000 · Knowledge & Insights	158,508	99,446	158,508	59,062	99,446	147,450
5L000 · Leadership & Partnership						
L100 · Regional Meetings	10,000	1,568	10,000	8,432	1,568	-
L101 · Information Sharing Task Force	1,000	1,000	1,000	-	1,000	-
G301 · Grant Writing	10,000	4,770	10,000	5,230	4,770	500
G200 · Program Sponsorships/Contributions	10,000	2,000	10,000	8,000	2,000	6,000
G400 · Engagement Dashboard	-	-	-	-	-	-
G600 · Industry Relations	33,500	27,478	33,500	6,022	27,478	22,380
L800 · Leadership & Partnership Administration	3,000	300	3,000	2,700	300	225
L900 · Employee Compensation	42,381	23,296	42,381	19,085	23,296	39,221
5L000 · Leadership & Partnership	109,881	60,412	109,881	49,469	60,412	68,326
6G000 · General & Admin						
G100 · Board Administration	20,000	15,600	20,000	4,400	15,600	4,026
G300 · Consultants	10,000	8,500	10,000	1,500	8,500	-
G500 · Office Administration	36,000	36,715	36,000	(715)	36,715	127,403
G800 · Staff Administration	88,000	72,251	88,000	15,749	72,251	50,430
G900 · Employee Compensation.G&A	566,393	550,174	566,393	16,219	550,174	561,161
G999 · Accrued PTO Balances	56,378	56,378	56,378	-	56,378	57,159
6G000 · General & Admin	776,771	739,619	776,771	43,174	739,618	800,179
TOTAL EXPENSE	2,652,975	2,232,172	2,652,975	283,295	2,232,172	2,388,406
NET INCOME	(173,355)	401,626	(173,355)	437,472	401,626	(202,148)
Beginning Balance	935,209	935,209			935,209	1,137,357
Ending Balance	761,854	1,336,835			1,336,835	935,209
Reserve Goal (30% of 3 Yr Ave Grape Assessment)	565,483	565,483			565,483	567,042
Surplus/Deficit After Reserve Goal	196,371	771,352			771,352	466,866
Total Compensation	1,085,097	1,014,661	1,085,097	70,436	1,014,660	1,024,613



MATTERS FOR NOTING



AUGUST 11, 2022 BOARD PACKET

Education update

Prepared by: Bree Stock

Oregon Wine Symposium 2023 update

Strategic objectives

Advance collective intelligence in support of growing, making, and selling quality wines

Harness statewide strength to unite and empower the Oregon wine industry

Define, protect, and promote the reputation of Oregon wine globally

Overview

- The Oregon Wine Symposium in 2023 will return to an in-person event at the Oregon Convention Center on February 14 and 15.
- The OWB co-host and co-present the event with the OWA as voted by the OWB and OWA board directors May 13th 2022. The OWA will work on the Tradeshow with OWB presenting the Education curriculum for the event, both organizations will share responsibility for the General Sessions and OWA will host the Soiree.

Status

- Event date and venue confirmed for 2023
- The OWS23 Steering Committee is made up of Bree Stock, Marie Chambers, Eugenia Keegan, Denis O'Donohue, Jana McKamey, Jessica Blauert, Maria Ponzi and Andy Steinman. The first was held on May 25 ([view recording](#)) the meetings will be held bi-monthly to address budget, marketing, event management partners to ensure a seamless and successful Oregon Wine Symposium in 2023.
- The format will follow the successful 2020 Symposium. Each day will begin with a 45-60min General Session and welcome from each organization. A 60min tradeshow break will follow and then a 90min education seminar in each of the three tracks of viticulture, enology and sales/marketing. Lunch will be 90min with a presentation day given to each organization, OWA taking the 14th of February and OWB presenting on the 15th of February.
- OWS Program Format 2023:



Day 1/Feb 14th - Tuesday					Day 2/Feb 15th				
8:00 AM	Registration & Tradeshow Coffee				8:00am	Registration & Tradeshow b/fast			
9:00 AM	General Session: Welcome & State of The Industry	Intro both Presidents/Chairpersons			9:00 AM	General Session & Climatology Report	Intro Assoc Eds		
10:00 AM	Tradeshow Break				10:00 AM	Tradeshow Break			
11:00 AM	Session 1 Vit (90min)	Session 1 Eno	Session 1 Sales	Add-on CB Wkshp	11:00 AM	Session 1 Vit	Session 1 Eno	Session 2 Sales	Add-on Prft Plnrr
12:30 PM	Lunch				12:30 PM	Lunch			
1:00 PM	General Session				1:00 PM	General Session			
2:00 PM	Tradeshow Break	Tradeshow Break		Add-on Sustainable Add-On TRM Roundtable	2:00 PM	Tradeshow Break	Tradeshow	Tradeshow	Add-on WISE
3:00 PM	Session 2 Vit (60min)	Session 2 Eno	Session 2 Sales		3:00 PM	Session 2 Vit	Session 2 Eno	Session 2 Sales	
4:00 PM	Session 3 Vit (60min)	Session 3 Eno	Session 3 Sales	Add-on	4:00 PM	Session 3 Vit	Session 3 Eno	Session 3 Sales	
5:00 PM	Tradeshow Break				5:00 PM	End of Symposium			
5:30 PM	Soiree								
7:00 PM	End Day 1								

- The viticulture and enology committees have already met and identified seminars of interest. These will be confirmed by the end of August 2022.
 - **Viticulture confirmed seminars:**
 - Pest & Disease – 60 min – Walt Mahafee and Vaughn Walton
 - Frost Discussion – 60 min – Patty Skinkis
 - Soils Into Grapevine – 60 min – Paul Schreiner and Andy Gallagher
 - OWB Funded Research Updates – 60 min - Dr. Greg Jones to introduce 4 researchers
 - Alternate Trellis Systems – 90 min – speakers tbd (seminar leads Brooke Robertson and Bryan Berenguer
 - Return of the Enduring Grape Grower – 90 min – Leigh Bartholomew seminar lead
 - **Enology confirmed seminars:**
 - Brett Update – 90 min - research and cellar control (James recent work, AWRI, Charlie Edwards, French paper)
 - Vit for Winemakers – 60 min – Rachel Healow and Scott Dwyer seminar leads
 - RDI, late pruning, etc (techniques) how they affect wine quality/winemaking parameters
 - Crop load trial
 - Nutrient mgmt in vineyard; implications for winery
 - Smoke Affected Wine – 90 min - Dan Urmini seminar lead
 - Elizabeth Tomasino updates
 - Nichole Schulte
 - ETS
 - Sparkling Wine - Alex Nichols seminar lead
 - Small Winery Solutions – Kiley Evans and Bethany Kimmel seminar leads
 - **Sales & Marketing seminars:**
 - Oregon Wine Month 2023 with David Dewitt, Danny Brager & Vanesa Haddik

- Community Benchmark & WISE Academy State of DTC
- Future of Wine
- Wine Fulfillment Logistics & Compliance
- Labor & Staffing – Sustainable wine tourism
- Distribution and E-commerce platforms

Specialty Crop Block Grant: OWB partners with Community Benchmark and WISE Academy

Strategic objectives

Advance collective intelligence in support of growing, making, and selling quality wines

Harness statewide strength to unite and empower the Oregon wine industry

Overview

Two-year program delivering a statewide benchmarking dashboard for producers and regional associations with expert DTC consultations and regional townhall quarterly. The integration of this technology coupled with coaching from WISE Academy and Community Benchmark will ensure producers expand DTC sales and develop successful DTC programs.

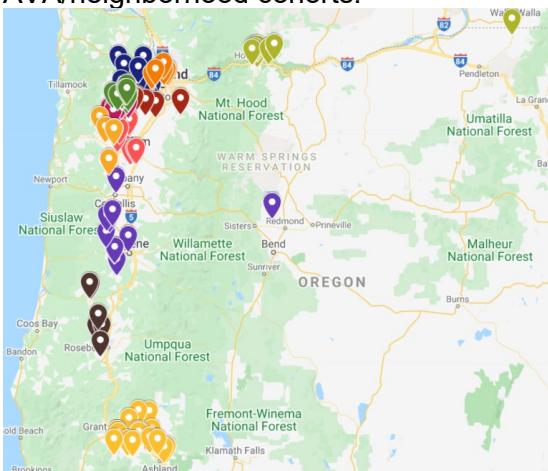
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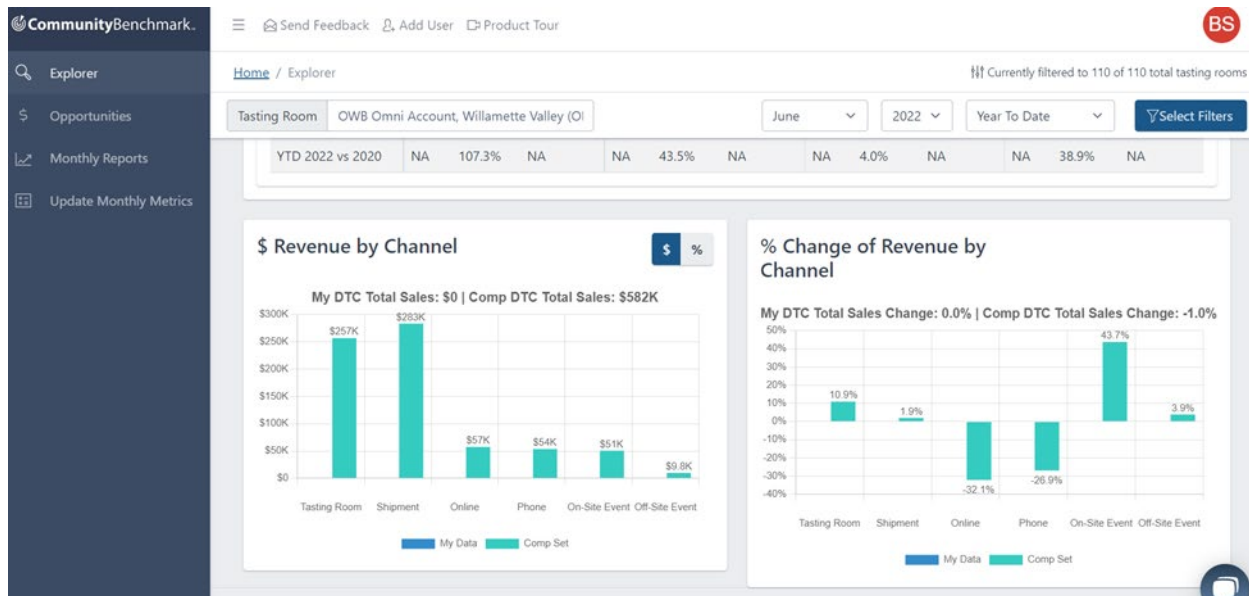
[Community Benchmark Grant Toolkit](#) posted to OWB industry website 12 November

[View recorded webinars, marketing materials, and see claimed accounts](#)

By the cut off Dec.15 there were 167 producers signed up for the CB program

Dashboards for regional groups and producers currently being uploaded with data and AVA/neighborhood cohorts.





- April 2022 data is from 114 tasting rooms across Oregon which participate in Community Benchmark.**
 - Overall DTC Total Sales:** Overall DTC sales are up **+0.9%** vs. 2021. (+28.7% vs 2020)
 - Visitors:** Visitation in April 2022 was up +1.8% vs. 2021. (+23.1% vs 2020)
 - Tasting Room sales:** Tasting Room sales in April 2022 were up +17.2% vs. 2021. (+78.9% vs. 2020)
 - Wine Club Total Sales:** Wine Club total sales in April 2022 were up +2.3% vs. 2021. (+27.5% vs. 2020)
 - Digital+:** Phone Sales in April 2022 were down -24.3% vs. 2021. (-16.5% vs. 2020). Online sales were down -35.4% vs. last year. (-17.8% vs. 2020)
 - * Includes data from Northern Borders (Columbia Gorge/Valley, Walla Walla Valley, Other), Southern Oregon (Applegate Valley, Rogue Valley, Umpqua Valley & Elkton), and Willamette Valley (Chehalem Mountains & Ribbon Ridge & Laurelwood, Dundee Hills, Eola-Amity Hills and McMinnville).*
- May 2022 data is from 135 tasting rooms across Oregon which participate in Community Benchmark.**
 - Overall DTC Total Sales:** Overall DTC sales are similar to **+0.1%** vs. 2021. (+30.6% vs 2020)
 - Visitors:** YTD Visitation in May 2022 was down -2.7% vs. 2021. (+54.9% vs 2020)
 - Tasting Room sales:** YTD Tasting Room sales in May 2022 were up +10.9% vs. 2021. (+104.0% vs. 2020)
 - Wine Club Total Sales:** YTD Wine Club total sales in May 2022 were up +1.5% vs. 2021. (+26.4% vs. 2020)
 - Digital+:** YTD Phone Sales in May 2022 were down -19.8% vs. 2021. (-16.2% vs. 2020). Online sales were down -31.9% vs. last year. (-29.7% vs. 2020)
 - * Includes data from Northern Borders (Columbia Gorge/Valley, Walla Walla Valley, Other), Southern Oregon (Applegate Valley, Rogue Valley, Umpqua Valley & Elkton),*



and Willamette Valley (Chehalem Mountains & Ribbon Ridge & Laurelwood, Dundee Hills, Eola-Amity Hills and McMinnville).

- **June 2022 data is from 135 tasting rooms across Oregon which participate in Community Benchmark.**
 - **Overall DTC Total Sales:** Overall DTC sales YTD are down **-0.9%** vs. 2021. (+32.1% vs 2020)
 - **Visitors:** Visitation YTD was down -7.1% vs. 2021. (+43.7% vs 2020)
 - **Tasting Room sales:** Tasting Room sales YTD were up +7.8% vs. 2021. (+91.7% vs. 2020)
 - **Wine Club Total Sales:** Wine Club total sales YTD were up +1.7% vs. 2021. (+27.1% vs. 2020)
 - **Digital+:** Phone Sales YTD were down -21.6% vs. 2021. (-20.6% vs. 2020). Online sales YTD were down -31.8% vs. last year. (-30.7% vs. 2020)
 - * Includes data from Northern Borders (Columbia Gorge/Valley, Walla Walla Valley, Other), Southern Oregon (Applegate Valley, Rogue Valley, Umpqua Valley & Elkton), and Willamette Valley (Chehalem Mountains & Ribbon Ridge & Laurelwood, Dundee Hills, Eola-Amity Hills and McMinnville)
- Engagement and data collection in the Community Benchmark continues to increase across the state.

Next steps and timing

- Community Benchmark statewide DTC trends updates are presented in the Grapevines each month, as available.
- Second tranche of sign-ups continues, please continue to message to your colleagues and regional associations.
- Community Benchmark is working on identifying dates to travel around Oregon to deliver workshops later this year.

Oregon Wine Month Trade Education Webinars & Certification Development Update

Strategic objectives

Define, protect, and promote the reputation of Oregon wine globally

Engage with trade influencers and importers to increase availability of Oregon wine

Overview

- [Online Wine Academy - Oregon Wine Expert Certification with Bree Stock, Master of Wine](#) created by OWB Education Director and Master of Wine, Bree Stock. OWB sponsored 100 trade scholarships for the 2022 OWM promotion and provided scholarships to be given out by regional associations to their trade contacts.



- - 7 webinars were developed and delivered for Oregon Wine Month promotion which began the first week of April. The April “Discover Oregon” webinar attracted nearly 400 registrations and had 160 “live” attendees, primarily from US & Canada but as far as Ireland and Japan. Seminar has been made available to all on the Oregon Wine YouTube channel and emailed to all registrants. All webinars attracted more than 200 registrants.
- - [Oregon Overview April 4th](#)
 - [Discover Willamette Valley April 11th](#)
 - [Uncover PDX Urban Wineries April 18th](#)
 - [Discover Rogue Valley April 28th](#)
 - [Discover Umpqua Valley May 4th](#)
 - [Discover Oregon's Northern cross-border AVAs May 9th](#)
 - [Discover Oregon's Future Farmers](#)
- A masterclass on Southern Oregon Wines was presented to the 20 OPC inbound tour participants in Eugene at Civic Winery
- In August Oregon will be sponsoring a trade lunch seminar for the TEXSOM trade volunteers and SommerCampers. Medal winning wines from around the state have been selected and the presentation is in development.

Next steps and timing

- Content development of OWB masterclasses is underway

Oregon Labor & Salary Survey Presentation

Strategic objectives

Advance collective intelligence in support of growing, making, and selling quality wines

Harness statewide strength to unite and empower the Oregon wine industry

Define, protect, and promote the reputation of Oregon wine globally

Overview

OREGON WINE INDUSTRY LABOR & SALARY SURVEY



- The Oregon wine labor and salary survey, conducted since 2017, was borne out of the recognition that existing wine industry labor and salary data sets are skewed heavily to California and do not translate directly to the hiring environment in Oregon. As the Oregon wine industry grows both organically and through investment from outside the state, more relevant benchmarking is needed to help small businesses plan for personnel costs as they expand their teams. Similarly, employers and employees are in need of better information to make competitive employment offers and enter into salary negotiations. To provide this more helpful context for Oregon wine businesses, the study surveys Oregon wineries and vineyards to understand average pay across 20 winery and vineyard positions. Conducted each year by Sociologist & Anthropologist, Dr. Jeff D. Peterson, with funding support from the Oregon Wine Board and its Education Committee. [2021/2022 Labor & Salary Survey Presentation](#)

Next steps and timing

- ***Industry Education Committee requests a concerns and trends survey that identifies education needs among growers, producers/makers and sales. This is requested to present as a general session at symposium. This survey could also be led by Dr. Jeff Peterson and include the 2022/2023 Labor Survey. Does the board approve funding for Dr. Peterson and the rollout of the survey late summer/early fall.***

AUGUST 2022 BOARD PACKET communications update

Prepared by: Sarah Murdoch

Oregon22 and Wine

Strategic objectives

Supporting the pillar of Brand Equity, in enhancing the reputation of Oregon Wine, and Market Expansion in helping communicate Oregon Wine outside our state

Overview

This summer Oregon hosted one of the biggest events to come to the state in years—the Track and Field World Championships in Eugene. While thousands of media attended, OWB, Travel Oregon and Travel Lane County leveraged enhanced media attention by diverting some of it to wine.

First, OWB worked tangentially with Travel Oregon with the Governor’s Office who served Willamette Valley Vineyards wine for the welcome dinner in their suite and activation spaces at the Eugene Riverfront Festival and Agate Street.

Second, OWB was invited to participate in the opening of a new tasting room, the first in Springfield of Iris Vineyards. 14 writers and travel partners were in attendance (many there for the track meet) including:

- Vanessa Salvia Editor, Eugene Magazine
- Mary Reilly, Springfield Chamber
- Rich Dunaven, Seen Eugene Magazine
- Sarah Murdoch, Oregon Wine Board
- Neal Benson & Alyse Stone, Winery Wanderings
<https://winerywanderings.com/>
- Nancy Brown & Cory Brown, travel/hotel lodging writers. Multiple publications
<https://www.nancydbrown.com/>, and North Gilham Living Magazine
- Meg Trendler, Travel Lane County
- David Lovell, Lane County Commissioner
- Ellen Landis, Great Northwest Wine Magazine, Slow Wine USA, McMinnville Wine Classic Competition judge
- KEZI TV (earlier in the week)



After a meet-n-greet at Iris Vineyards with owner Richard Boyles, and tour with winemaker Aaron Lieberman, we celebrated the opening with a private dinner at the home of Tim and Judi Welch, owners of Welch Vineyards with GM David Cordtz.

Status

Monitor press results coming in from event.



Images: Aaron Lieberman checks vines at Iris. Group toast at new Iris Tasting Room, Springfield. Meg Trendler, Travel Lane County sips on a wine cocktail.



AUGUST BOARD PACKET

Trade relations update

Prepared by: David DeWitt

Oregon Wine Month Trade Updates

Strategic objectives

Market Expansion, Brand Equity

Overview

Since 2012, the Oregon wine industry has celebrated Oregon Wine Month annually in May as a promotional period of focused trial and awareness.

Status

The OWB is planning for OWM 2023. We will collaborate with trade partners nationally to solicit information on program strengths and areas for improvement. We will develop plans in a collaborative spirit with regional stakeholders and national trade members.

- The OWB is undergoing planning activities for 3-tier and DtC sales channels.

Next steps and timing

- August meetings with regional associations statewide for planning and execution.
- Network and develop relations with national retailers – Wholefoods have been identified as an interested partner. These meetings will be ongoing.
- Implementing 2022 education webinar survey results and planning 2023 with regional partners and Bree Stock.
- Will publish the first OWM sell sheet in September and develop presentation deck in Q4.

TEXSOM 2022 – Teksom International Wine Awards

Strategic objectives

Brand Equity, Market Expansion

Overview

TEXSOM is regarded as one of the premier trade/industry conferences in the country with international participation. TEXSOM Awards brings the industry together to identify and champion beverages of quality and distinction from around the world, invests in brand-building for all award-winners, and creates additional avenues to market and exposure through the extensive sommelier and beverage industry network.

Status

We will be executing trade/media luncheon and education focused on all OR growing regions incorporating TIWA 2022 award winners.



- 62 Oregon wines were submitted for judging in the 2022 TIWA competition.
- Since 2016 OWB has participated in the conference and awards process.
- Of the 62 wines submitted this year 42 secured Bronze, 16 Silver, 2 Gold, and 1 each of Platinum and Judge's Choice Medals.

Next steps and timing

- OWB will sponsor Trade/Media luncheon on 8.28.22.
- All luncheon participants will be entered into OWB's mailing lists and several attendees will be enrolled into the NVWA's Oregon Wine Expert Online Course.
- OWB will secure similar level of support to year's past.
- OWB consolidated wines and fulfillment to event.

Resource Studio Updates

Strategic objectives

Brand Equity, Market Expansion, Wine Tourism, Insights and Integration

Overview

Update presentations with 2021 Oregon Vineyard and Winery Report.

Status

The resource studio will continue to be updated with most current data and branding work.

- Full story presentation updates and incorporate most current AVA/Industry data.
- Continue website branding conversion.

Next steps and timing

- Targeting Q4 completion of updates and presentation fixes.

Oregon Wine Flies Free

Strategic objectives

Brand Equity, Market Expansion, Wine Tourism, Insights and Integration

Overview

Refresh collateral to support "relaunch" of Alaska Airlines Wine Flies Free program.

Status

Artwork and assets are being developed to share with Trade and Industry.

- Deplete current stock of hard copy elements.



Next steps and timing

- Identify program needs and produce collateral to support winery involvement.
- Targeting Q3 for design work and incorporate into OWM planning.

Winery/Tasting Room Listings

- 500+ listings on OregonWine.org
- OWB recently conducted wave of outreach reminding wineries to update listings
- Outreach motivated wineries to review and update listings on newly launched consumer website
- Listing information is provided to Travel Oregon through OTIS
- Listing information is also essential in creating Oregon Wine Touring Guide

oregon wine

DISCOVER OR. — REGIONS — VISIT OR. — EVENTS & PROGRAMS

Free Touring Guide

Home

Tasting Room Directory

SEARCH: Enter Keyword

REGIONS: Regions

VARIETIES: Varieties

FEATURES: Features

Portland

Walla Walla Valley

Columbia Gorge

Willamette Valley

Umpqua Valley

Rogue Valley

Actions

[Submit new listing](#)

[Edit Profile & Change Password](#)

[Logout](#)

My Listings

LISTING	STATUS	DATE POSTED	LAST EDITED	ACTIONS
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Wine Touring Guide Update

Fiscal July 2021 - June 2022		
Box Shipments	7,598	
Consumer copies	1,957	
	9,555	17%
Total shipments since April 2021	56,441	
Digital Edition July 1, 2021 - June 30, 2022		
Users	1,307	
Sessions	1,694	
Duration	4:59	
Number of pages/session	22.94	
Pageviews	38,857	



or.

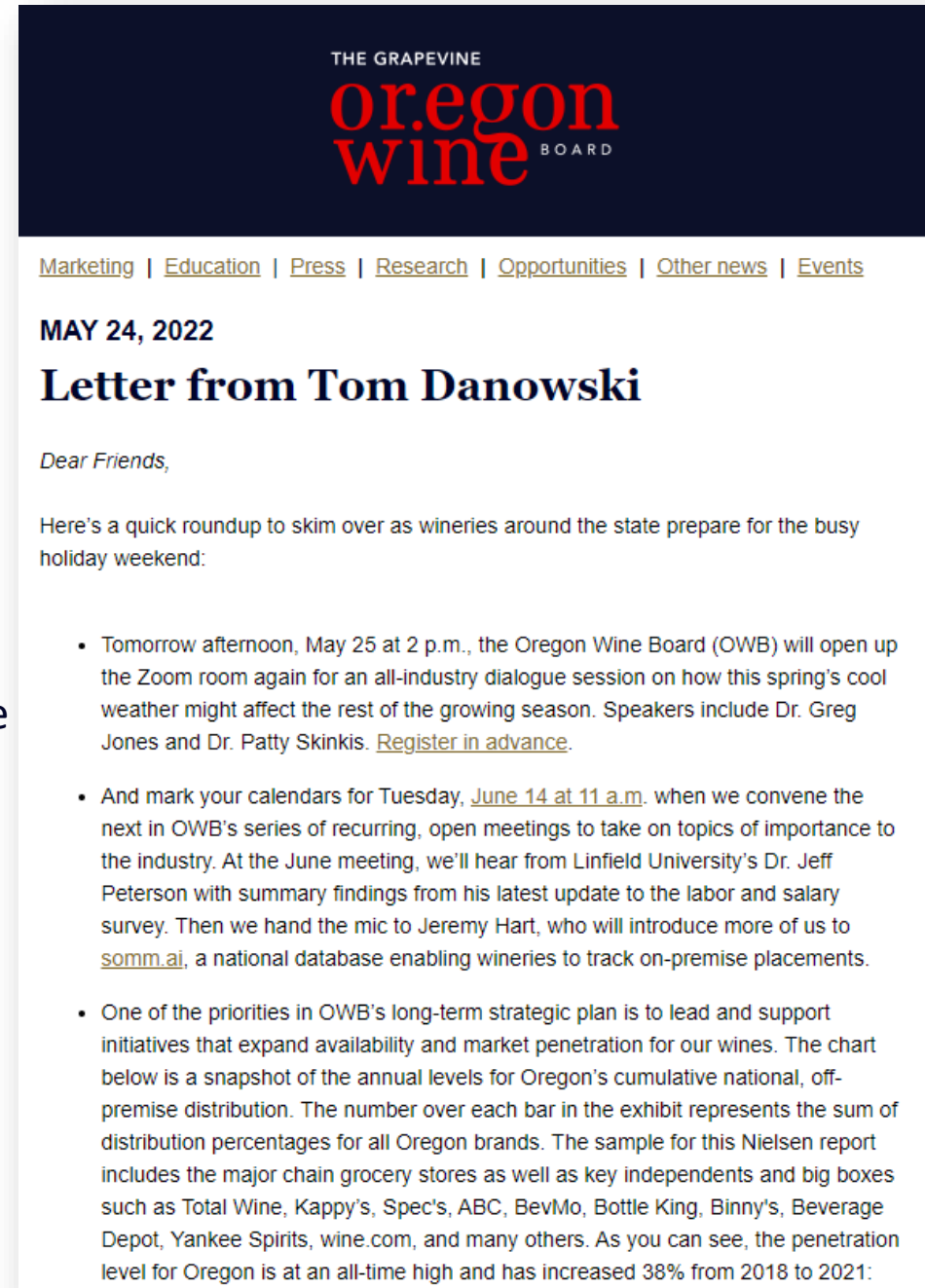
Grapevine Newsletter

Open rate increased from 33% to 39% in last fiscal year

Contributing factors:

- Increased use of visuals
- More digestible content and layout
- Media and press section added back in
- Punctuality in sending
- Use of preview text in the email subject

Grapevine continues to be the best way to stay up to date on OWB and industry activities and we will continue to explore ways to increase open rates.



The screenshot shows the top portion of an email newsletter. At the top, there is a dark blue header with the text "THE GRAPEVINE" in white, followed by "oregon wine BOARD" in a large, red, stylized font. Below the header is a navigation bar with links: "Marketing | Education | Press | Research | Opportunities | Other news | Events". The main content area is white and begins with the date "MAY 24, 2022" in bold. The subject line is "Letter from Tom Danowski" in a large, bold, dark blue font. Below the subject line is a salutation "Dear Friends,". The main body of the email starts with the text "Here's a quick roundup to skim over as wineries around the state prepare for the busy holiday weekend:". This is followed by a bulleted list of three items. The first item mentions a Zoom session on May 25 at 2 p.m. with speakers Dr. Greg Jones and Dr. Patty Skinkis, and a link to "Register in advance". The second item mentions a meeting on Tuesday, June 14 at 11 a.m., with speakers Dr. Jeff Peterson and Jeremy Hart, and a link to "somm.ai". The third item discusses the Oregon Wine Board's long-term strategic plan and mentions a chart showing cumulative national, off-premise distribution levels for Oregon's wines, with a note that the penetration level for Oregon is at an all-time high and has increased 38% from 2018 to 2021.

or.

TRUE CHARACTER

or.egon
wine EST — 1847

INTERNATIONAL MARKETING COMMITTEE MEETING
July 28, 2022

PLAN FOR THE DAY



- Introductions
- Funding Review
- 2021 – 2022 Programming Update
- 2022 – 2023 Planning – Markets and Activity
- Open Discussion

or.

INTRODUCTIONS AND COMMITTEE OVERVIEW

BOB MORUS, STEVE THOMSON, TOM DANOWSKI, MARIE
CHAMBERS & MARGARET BRAY

or.

FUNDING REVIEW

MARIE CHAMBERS

or.

International Marketing Program Funding

➤ **Market Access Program (MAP)**

- Applied for and allocated annually through NWC
- OWB – \$552,000 for use in 2022-2023

➤ **Agricultural Trade Promotion Program (ATP)**

- OWB \$1,370,800 total allocation
- OWB – approx. \$470,000 used; approx \$900,800 remaining

➤ **Global Broad-based Initiatives (GBI)**

- New project award to conduct in-market research across Canada for Oregon, Washington, California and New York
- Work to be carried out by Predhomme Marketing Insights
- First year approval for \$80,000

or.

2021-2022 PROGRAMMING UPDATE and
2022-2023 MARKET and ACTIVITIES
PLANNING

MARGARET BRAY

or.

FISCAL YEAR 2021/2022 PROGRAMMING UPDATE

- **CANADA** – Northwest Wine Expedition Series
- **EUROPE** – Prowein, tastings in Copenhagen, Stockholm and Paris
- **UK** – PR, social media including content hub and London Restaurant Festival Sponsorship
- **MEXICO** – Mexico City and Los Cabos Tastings
- **JAPAN** – Social media programming, website update and NW Wine Promotion
- **KOREA** – Limited educational programming

or.



FISCAL YEAR 2021/2022 PROGRAMMING RECAP

CANADA – THE NORTHWEST WINE EXPEDITION

- in collaboration with Washington State
- 26 Oregon wineries

- **TORONTO** – June 6, 2022
 - Trade Tasting – 225 attendees
 - Master Class – 49 attendees
- **MONTREAL** – June 8, 2022
 - Trade Tasting – 285 attendees
 - Master Class – 51
- **CALGARY** – June 13, 2022
 - Trade Tasting – 124 attendees
 - Master Class - 49
- **VANCOUVER** – June 15, 2022
 - Trade Tasting – 158
 - Master Class - 49

or.

2022 – 2023 PROGRAMMING/RECOMMENDATIONS

CANADA

Planned

- Wines from the Edge – November 10, 2022 in collaboration with New Zealand Wines

Recommended

- Return to all cities – Toronto, Montreal, Calgary and Vancouver
- Split the events between two months
 - Vancouver and Calgary - April 2023
 - Toronto and Montreal – June 2023
- Possible supplemental events in secondary markets
 - Whistler
 - Victoria
 - Banff
 - Other

or.

FISCAL YEAR 2021/2022 PROGRAMMING RECAP

EUROPE



- **COPENHAGEN** – March 22, 2022
 - Trade and lunch tasting

- **STOCKHOLM**
 - Trade dinner and tasting – March 21
 - Trade tasting and master class – May 9
 - 11 Oregon Wineries

- **PARIS** – May 12
 - Tasting at the Ambassador Residence with California Wine
 - 15 Oregon wineries

- **PROWEIN** – May 15 - 17
 - New booth with slight separation from Washington and new hall
 - 12 Oregon wineries

or.

2022 – 2023 PROGRAMMING/RECOMMENDATIONS

EUROPE

Planned

- Prowein – March 19 – 21, 2023
 - Booth will be the same as 2022 with some slight adjustments
 - Space for 14 wineries
 - Possible space for self-pour if more than 14 wineries are interested

Recommended

- COPENHAGEN –Trade tasting with Washington Wines – March 15, 2023
- STOCKHOLM – Smaller programming throughout the year with no winery participation – anticipated return to tasting in 2024
- OTHER MARKETS OF INTEREST

or.

FISCAL YEAR 2021/2022 PROGRAMMING RECAP

UNITED KINGDOM

➤ SOCIAL MEDIA

- Strong Instagram presence – oregonwineUK

➤ CONTENT HUB

- Essentially our UK website – oregonwine.co.uk
- Frequently updated content, houses information about Oregon

➤ PRESS RELEASES and PRESS COVERAGE

- Scheduled press releases about Oregon wine
- Press coverage in various lifestyle magazines and local papers such as The Independent, Financial Times and Harpers

➤ LONDON RESTAURANT FESTIVAL SPONSORSHIP

- Oregon Wine the official wine sponsor of LRF
- Takes place in the Spring and Fall
- Oregon Wine dinner at The Princess of Shoreditch – June 10
 - Over 50 attendees and one of the most popular and fastest selling dinners of the whole Spring festival
 - Partnership with AMEX and their top consumers
 - 6 Oregon wineries highlighted



or.

2022 – 2023 PROGRAMMING/RECOMMENDATIONS

UNITED KINGDOM

Planned

- London Restaurant Festival Fall Sponsorship
 - 3 dinners targeting various AMEX tiers - Week of October 24
 - Winery reps attendance encouraged but not required
 - 3 – 4 wineries per dinner
- Oregon Wine Trade Tasting
 - Oregon only trade tasting – October 24, 2022
 - Confirmed for the US Embassy in London with the potential of it being held at the Ambassador's residence
 - Potential collaboration with other US ag products
- Inbound Media Tour – mid-September
 - In collaboration with Travel Oregon
 - Small group of lifestyle magazine press to tour Oregon with 1.5 days focus on Oregon wine

OTHER IDEAS

or.

FISCAL YEAR 2021/2022 PROGRAMMING RECAP and RECOMMENDATIONS

MEXICO

- **TRADE TASTING – MEXICO CITY – April 25**
 - Return to Mexico City for trade tasting and master class in collaboration with Washington
 - 15 Oregon wineries participated
 - Wines did not clear customs in time (cleared in June)

- **MASTER CLASS AND DINNER – LOS CABOS – April 27**
 - Master class for the top trade of 25 in the Los Cabos area
 - Dinner pairing with Oregon wines
 - Wines did not clear customs in time

Recommended

- Tough market to ship to
- Underspent budget from the last few years so a surplus of 50K in allocation exists between the two states
- Washington approved the use of their remaining budget to use for smaller targeted programming throughout the year, concentrating on Mexico City and Los Cabos
- Programming will be created so that wineries can participate but it isn't necessary
- Move away from the large tastings but use our allocated funds and wines



or.

FISCAL YEAR 2021/2022 PROGRAMMING RECAP and RECOMMENDATIONS

JAPAN

➤ **SOCIAL MEDIA, WEBSITE UPDATE and NW WINE PROMOTION**

- Due to travel constraints OWB focused efforts on social media and updating the website as we work with new partners Aviareps
- The NW Wine Promotion was held once again with the award ceremony in June

Recommended

- Washington planning on programming in Tokyo in and around May 16, 2023 – good opportunity to revisit the market
- Level 2 NW Wine Certification could coincide with a trade tasting
- Osaka?
- Other?

KOREA

➤ **B2C EDUCATION SEMINARS**

- Series of both online and in-person education seminars
- Press coverage in various lifestyle magazines and local papers such as The Independent, Financial Times and Harpers

Recommended

- Washington planning on programming in Seoul in and around May 18, 2023 – good opportunity to revisit the market
- Level 2 NW Wine Certification could coincide with a trade tasting
- Other?

VINEXPO SINGAPORE – May 23-25, 2023

- Washington has intentions to participate in Vinexpo – interest on any level?

or.

2022 – 2023 PROGRAMMING/RECOMMENDATIONS

INBOUND TOURS

➤ **OREGON PINOT CAMP INTERNATIONAL SUMMER TOUR**

- 18 key trade from 8 markets around the globe were a part of our group and also attended OPC

Recommended

- Continuing with the programming at the same size and level

➤ **GBI UK SOMMELIERS TOUR**

- 10 key trade from the UK visited Oregon as part of their western US tour

Recommended

- Continuing this type of programming if we receive the grant funds to do so



or.

2022 – 2023 Proposed Calendar of Activities

JULY

Jul12 -14 GBI Inbound Tour (concluded)

AUGUST

No programming scheduled

SEPTEMBER

TBD - UK Media inbound in collaboration with Travel Oregon

OCTOBER

October 24 – Oregon Trade Tasting London
Week of Oct. 24 – London Restaurant Festival Oregon Wine
Dinner series in collaboration with AMEX

NOVEMBER

November 10 – Wines From the Edge – Toronto

DECEMBER

No programming scheduled

JANUARY

No programming scheduled

FEBRUARY

Potential small Mexico programming

MARCH

March 15 – Trade tasting with WA – Copenhagen
March 19-21 – Prowein

APRIL

Early April – Vancouver and Calgary NW Wine Expeditions with WA

MAY

Week of May 16 – Tokyo Trade Tasting and Level 2 Northwest
Wine Certification (pending)

Following Japan around May 18 – Seoul Trade tasting and Level 2

*May 23-25 – Vinexpo Singapore

JUNE

Early June – Toronto and Montreal NW Wine Expeditions with WA
Late June – OPC and OWB International Summer Tour

or.