



OREGON
WINE
BOARD

ANNUAL REPORT

2015-2016

INDUSTRY.OREGONWINE.ORG



LETTER FROM YOUR CHAIRMAN

For my final Chairman's report on the state of our industry, I am pleased to say that the strength and growth that we have seen over the past decade continues. While there are many reasons for continued optimism, the Oregon Wine Board is also increasingly aware that new pressures are affecting many family-owned wineries and vineyards across the state. For this reason, the OWB has doubled its focus on developing new programs, investing for impact, providing tools to help strengthen the Oregon Wine brand and improve operating efficiencies for Oregon's wine community.

In terms of growth, the latest Vineyard and Winery Report shows that our industry continues to advance, but at a much more modest pace:

- Overall production in 2015 reached an all-time high of 84,949 tons, up 7% over the prior vintage. This was the result of both more planted acreage and higher than average yields per acre.
- Total case sales grew by 9%, with the largest increase coming from direct-to-consumer sales – a 14% increase over 2014. This news followed the 2015 ShipCompliant and Wines & Vines report on direct-to-consumer sales, which showed Oregon wine sales surged almost 15% last year versus an overall category rate of 8%, propelling our state's wineries to \$100 million in direct annual sales. Similarly, 2015 Nielsen data showed that Oregon wine sales were up just over 13% in national dollar volume compared to the total table wine category growth of 5%.
- The total number of wineries reached 702, a record high and a 4% increase over 2014.
- The number of vineyards increased 2% to 1,052.

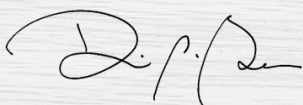
In addition to this growth, the attention and care given by our grape growers and winemakers from vine to bottle has never been higher, as evidenced by our consistently strong wine reviews. Though Oregon contributed only 1% of domestic wine production, it accounted for 21% of domestic wines that garnered a score of 90 points or higher by Wine Spectator in 2015. Additionally, five Oregon wines from four AVAs made Wine Spectator's list of Top 100 Wines of 2015 and for the second time, an Oregon wine made the No. 3 spot.

To support this growth and national attention, your Board and OWB's management team concentrated on engaging trade gatekeepers to increase the availability of Oregon wines, fostered industry understanding of the importance of scientific research, and drove competitive advantage through industry education. Some highlights of this past year include:

- Hosting the largest Oregon Wine Symposium to date, with more than 1,700 industry professionals in attendance.
- Welcoming the highest-performing fine wine distributors in the U.S. to Oregon as part of the Wine & Spirits Wholesalers of America annual Conference on Leadership Development.
- Producing the inaugural edition of the Official Oregon Wine Touring Guide.
- Growing the Oregon Wine A-List Awards program by 36%. This program recognizes restaurant wine lists across the world that displays enthusiasm for the diverse regions, varieties and producers of Oregon.
- Conducting a national consumer market research study to understand the purchasing habits, buying influences and perceptions of premium wine regions among the segment of fine wine consumers who purchase 85% of wines priced more than \$20 at retail.
- Leveraging federal grant funding to bring influential buyers from around the world to Oregon, and conducting international tastings for importers and restaurateurs in Europe and Asia.
- Partnering with the Oregon Winegrowers Association and regional winery groups to lobby effectively in Salem for important refinements to the 2011 legislation that established the nation's first Wine Country License Plate program.
- Furthering our investment in technical research to support advancements in viticulture and enology through a 17% increase in funding.

With all this momentum, it is clear that our industry is on the verge of a new era. It's been a pleasure to serve as your chairman this past year.

On behalf of the Oregon Wine Board of Directors and with gratitude for your many contributions to our accomplishments,



David Beck | Crawford Beck Vineyard
Chairman, Oregon Wine Board

“The story of Oregon wine no longer begins and ends with Willamette Valley Pinot Noir, as many of the state’s most exciting new offerings hail from Southern Oregon.”

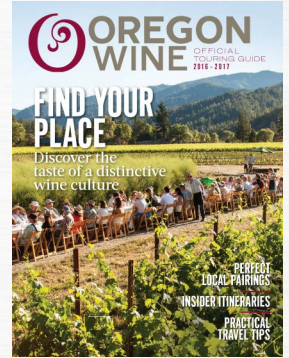
– PAUL GREGUTT
WINE ENTHUSIAST
JANUARY 2016

MARKETING AND COMMUNICATIONS

Marketing and communications programs are designed to promote broader availability of Oregon wines, drive higher awareness of Oregon’s exceptional wine quality, generate wine tourism and enhance the value of Brand Oregon. Here are summaries of some key programs.

Oregon Wine Touring Guide

The inaugural edition of the Official Oregon Wine Touring Guide was published in April 2016. Funded through a Wine Country License Plate grant administered by Travel Oregon, the OWB partnered with SagaCity Media to produce and distribute 50,000 copies of this 80-page, four color magazine. New articles, detailed AVA maps and regional itineraries alongside beautiful photography showcase each of Oregon’s unique wine regions, inspiring more visits to tasting rooms by locals and out-of-towners alike. More than 450 tasting room listings help guests find their way throughout each region.



Roughly 30,000 copies have been distributed to hotels and welcome centers. By the end of June 2016, 191 Oregon winery tasting rooms and other businesses had requested a shipment of guides, which can be ordered for free via [this link](#). Additionally, consumers in 39 states requested a guide be sent directly to them free of charge. The Touring Guide is also available to view for free digitally at oregonwine.org.

National Consumer Market Research Study

OWB commissioned Full Glass Research to conduct a survey to better understand the purchasing habits, buying influences and perceptions of premium wine regions among ultra premium wine consumers. This consumer base is comprised of approximately 10-12 million adults in the U.S. who regularly purchase 85% of wines priced higher than \$20 at retail. They consume wine more than once per week and purchase wine priced at more than \$20 at least monthly. This study was comprised of 475 consumers from around the country, who are part of the Wine Opinions survey panel.

Three prime opportunities presented themselves in the data:

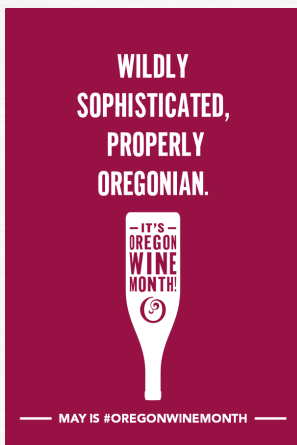
1. Increase the awareness and perception of Oregon’s quality.
2. Extend the availability of Oregon wine nationally to expand awareness, trial and repeat purchase.
3. Drive more tourism among fine wine consumers to Oregon, which will lead to an increase in purchase in visitors’ home markets.

[Click here](#) to read OWB’s recap of key takeaways and findings from this market research study.

Oregon Wine Month

The fifth annual Oregon Wine Month in May 2016 built on the success of the 2015 program. The *Wildly Sophisticated, Properly Oregonian* campaign featured Oregon winemakers known for their commitment to environmental sustainability. It generated more than 2.5 million consumer impressions across a highly targeted social, digital, print and radio media plan. News releases were distributed in the months leading up to Oregon Wine Month, which resulted in 60 articles that garnered \$113,671 in ad value via earned media and a combined reach of more than 12.2 million impressions.

For the second year, an online marketing toolkit for wineries to use in activating Oregon Wine Month across their own sales and communications channels was issued and it generated more than 1,000 page views. Point-of-sale kits were shipped by



request to 111 tasting rooms across the state. Wineries posted 254 events to the calendar hosted on oregonwine.org, which enjoyed a 65% increase in page views vs. last year during the campaign period of April and May. A consumer sweepstakes offering two weekend getaways to Oregon wine regions garnered more than 5,000 entries, which more than doubled the OWB's database of consumers that have agreed to receive communications about Oregon wine via the Oregon Wine Insider consumer newsletter.

To increase on-premise engagement with Oregon Wine Month, a partnership with OpenTable and advertising buys focused on participating restaurants offered additional exposure leading up to and during Oregon Wine Month.

To participate, restaurants offered a month-long Oregon wine special of their choice. Promotions included wine pairings, featured wine flights, discounted Oregon wine bottles or glass purchases and more. Seventy-seven restaurants participated, including three chains – Pastini Pastaria, City Winery and McMenamins – for a total of approximately 150 units participating across the U.S. Additional support of participating A-List restaurants was offered in the form of a \$50 server incentive. Of the restaurants responding to the follow-up survey, 40% reported an increase in sales of Oregon wine of more than 15%, while 75% stated they were “very likely” to participate in a similar program in the future.

Oregon Wine Month 2016 delivered sales results across multiple channels. OWB engaged with four distributors with coverage across Oregon, and all four showed growth in their Oregon portfolios compared to 2015. Growth ranged from 15 to 42% in off-premise accounts and 11 to 40% in the on-premise channel. Wineries also reported direct-to-consumer sales growth out of their tasting rooms during May. Roughly 80% of respondents said they experienced tasting room sales growth compared with May 2015.

Oregon Wine A-List Awards

The Oregon Wine A-List Awards recognize restaurants that exhibit exceptional support for Oregon wines as demonstrated by depth, breadth, prominence and presentation on their lists. The A-List Awards aim to increase sales of Oregon wine within restaurant programs by engaging with restaurant wine buyers and sommeliers, providing public recognition to Oregon wine's biggest advocates and driving consumers to Oregon Wine A-List restaurants.



The 2016 list recognized 112 restaurants, up 36% from 2015. Thirteen restaurants were denoted as Regional Spotlight Award winners. The program's top honor, Wine Program of the Year, was announced and celebrated at the Oregon Wine Symposium. James Rahn was

recognized for his deep commitment to Oregon during his tenure as wine program director and sommelier at The Heathman Restaurant and Bar in Portland.

In September 2015, the OWB participated for the first time in Feast Portland. The OWB booth featured the 2015 Oregon Wine A-List Restaurant of the Year Chef Chris Czarnecki of the Joel Palmer House serving his signature mushroom risotto paired with five Oregon wines at Smoked!, a marquee event attended by 2,160 consumers, chefs, media and industry members.

In March 2016, the OWB partnered with Travel Portland's Portland Dining Month program to increase exposure of Portland's A-List restaurants participating in this program.

“Oregon Chardonnay – I love Oregon Chardonnay! Give us more! They seem to have just the right climate to produce top-class wines full of tension and complexity, yes, quite Burgundy-like in style.”

**- NEAL MARTIN
THE WINE ADVOCATE
JUNE 2016**



“Today that area, known as The Rocks District of Milton-Freewater, is the most distinctive AVA in the Pacific Northwest.”

- HARVEY STEIMAN
WINE SPECTATOR
SEPTEMBER 2015

Thirteen articles on the Oregon Wine A-List program were published with an ad value of more than \$80,000 via earned media. These articles had a combined reach of more than 8.6 million consumer impressions.

Oregon Wines Fly Free

The Oregon Wines Fly Free program continues to be a success in driving purchases at more than 325 Oregon wine tasting rooms by allowing consumers to have their fee waived when checking a case of wine on Alaska Airlines' outbound flights from five airports that serve Oregon wine regions. It is the only statewide program of its kind in the U.S.

During August and September 2015, a co-operative campaign was executed to promote Oregon Wines Fly Free. Advertising in Alaska Airlines Magazine and on social media, plus promotion during Feast Portland generated more than 3,300 sweepstakes entries with 987 entrants opting in to the Oregon Wine Insider consumer newsletter. The Oregon Wines Fly Free program was supported in the spring of 2016 with new print advertising.

The Oregon Wines Fly Free program is a partnership between OWB, Travel Oregon and Alaska Airlines. It is currently planned to run through spring 2017.



COMMUNICATIONS

Media Relations

In a continued effort to build the equity of the Oregon Wine brand among national premium and ultra-premium wine writers by showcasing the breadth of exceptional wines made across the state, the OWB conducted two media tours, which collectively covered all winegrowing regions. For the first time ever, the OWB partnered with the Washington State Wine Commission to highlight our three cross-border AVAs. The OWB also worked with several writers on an individual basis to either help them with itineraries for visits to Oregon or send them samples of currently released wines. Coverage increased over last year to more than 11,200 articles mentioning the key words Oregon Wine with an equivalent purchased advertising value exceeding \$237 million.

Publications that OWB specifically worked with to secure coverage include, but are not limited to, Bloomberg, The Dallas Morning News, Decanter, Eater, Food & Wine, Food Republic, Forbes, Fortune, James Halliday's The Wine Companion, Market Watch, The Somm Journal, Sunset Magazine, The Tasting Panel, Vineyard & Winery Management, The Wall Street Journal, Wine Business Monthly, Wine Enthusiast and Wines & Vines.

Additionally, OWB again coordinated with Neal Martin of The Wine Advocate on his Oregon report. The Wine Advocate published reviews for more than 770 Oregon wines. Of those, 42% were scored 90 points or higher between the April and June 2016 reports. This comprised more than 16 varieties from 12 AVAs.

INTERNATIONAL MARKETING



Market Access Program (MAP) funds along with other grants from the USDA continue to provide the resources for OWB's international marketing activities. OWB partners with the Washington State Wine Commission through the Northwest Wine Coalition (NWC) to fully leverage these funds by sharing market agents, event costs and travel expenses. NWC also partnered with the California Wine Institute in March 2016 to host the successful Go West trade tasting events in London and Copenhagen, which attracted a record number of Oregon winery participants.

Ten Oregon wineries participated in ProWein in Düsseldorf, which put Oregon wines on the world stage alongside the most prestigious winegrowing regions. In addition, NWC held trade tastings in Stockholm, Tokyo, Osaka and Seoul, which often included an educational seminar to boost the trade knowledge of Northwest wines.

OWB also sponsored in-bound visits for influential wine trade from its international target markets. Partnering with recognized programs, such as Oregon Pinot Camp (OPC), provides ideal opportunities to present Oregon to the world and create life-long Oregon wine ambassadors. In June 2016, OWB brought 17 key trade influencers from Australia, Canada, China, Denmark, Japan, Korea, Sweden and the U.K. to attend OPC. Their visit was preceded by a tour of the state in order to learn about and experience the range of outstanding wines made throughout the state. In conjunction with Washington, OWB also brought 13 trade and media guests from Japan for a state-wide tour in August 2015. Additionally, OWB coordinated a visit for 24 Swedish sommeliers in September 2015.

EDUCATION

Educational programs are designed to inform members of our wine community about technical research and business insights that can improve their grape farming, winemaking and management practices.

Oregon Wine Symposium

The 2016 Oregon Wine Symposium attracted a record breaking 1,700 participants, solidifying it as the largest wine industry event in the Pacific Northwest. More than 30 articles with an ad value exceeding \$58,600 via earned media were published on the 2016 Symposium. These articles had a combined reach of more than 635,000 impressions.

In its fifth year at the Oregon Convention Center, several innovative changes were made. The Oregon Wine Industry Awards Luncheon was incorporated into the Symposium allowing for a significant increase of industry members at the celebration honoring their peers. The Awards Luncheon was also expanded to include a new category, the Vineyard Excellence Awards, given to viticultural professionals who demonstrate outstanding collaborative spirit and technical expertise. Jesse Lopez of Celestina Vineyards in the Rogue Valley, Efren Loeza of Willamette Valley Vineyards in the Willamette Valley and Irineo Magaña of Phelps

"But what has me most enamored and captivated with the wines of Oregon are the many talented vintners that have the spirit and drive to turn vintage variation and (what could be) tribulation into vintage sensation with inspiration."

**- JULIA CROWLEY
SNOOTH
OCTOBER 2015**



“... it seems clear to me that Southern Oregon is the right climate for producing top grade Rhone blends.”

- NEAL MARTIN
THE WINE ADVOCATE
JUNE 2016

Creek Vineyards in the Columbia Gorge were honored for their professionalism and outstanding work ethic. [Click here](#) to read more about all the 2016 honorees.

The Symposium also introduced the experimental wine tasting session featuring 15 trials conducted by wineries and/or vineyards from around the state. Engaged participants spilled into the aisles clamoring to hear more about the experiments and taste the results. Due to the popularity of these new features, further improvements will be implemented in 2017.

If you were not able to attend the 2016 Symposium and would like to access material from the roster of exceptional presenters and specialized panelists from around the world, [click here](#) for session materials and select videos.

Expanded Educational Programs and Resources

The Oregon Wine Board further expanded the number of educational programs offered outside of the Symposium this year to include webinar-based learning opportunities, additional live workshops and the production of [educational resources](#) available on the industry website.

Two media relations webinars were produced to support the top priority identified in the 2015 Industry Survey. Media Relations 101 offered a comprehensive foundation for working with the media, while Media Relations 102 offered a closer look at what writers look for in pitches, samples and how they interact with and use social media. To accompany the consumer market research study of ultra premium wine consumers in the U.S., Christian Miller of Full Glass Research presented his findings on purchasing patterns and awareness of Oregon wines among this audience. OWB also offered a webinar on how to best engage with Oregon Wine Month, which included training on how to use the Oregon Wine Month toolkit and actionable strategies for increasing sales and program engagement. The culmination of these four webinars resulted in 371 total registrants with an overall satisfaction rating of 8.8 out of 10. The webinars have also been collectively viewed more than 538 times via the [OWB YouTube channel](#).

For the first time, OWB offered two live viticulture workshops: Harvest Safety and Labor Issues, and Canopy Management and Strategies for Limiting Trunk Disease, the latter presented by Dr. Richard Smart. The workshops resulted in a total of 91 registrants and the Dr. Smart workshop received exceptionally favorable reviews from attendees.

[Click here](#) for more information on these programs such as access to past webinar recordings, workshop slide shows, supplemental materials and tools, as well as a list of upcoming statewide educational opportunities.

RESEARCH

The OWB increased the funding for technical research by 17% allowing the Board to fund eight projects in viticulture and enology.

The priorities of the research funded are determined by the OWB research committee, which is comprised of industry professionals representing all areas of the state. A request for research applications is then issued nationally, and after careful review of proposals, projects are recommended to the Board of Directors for funding.

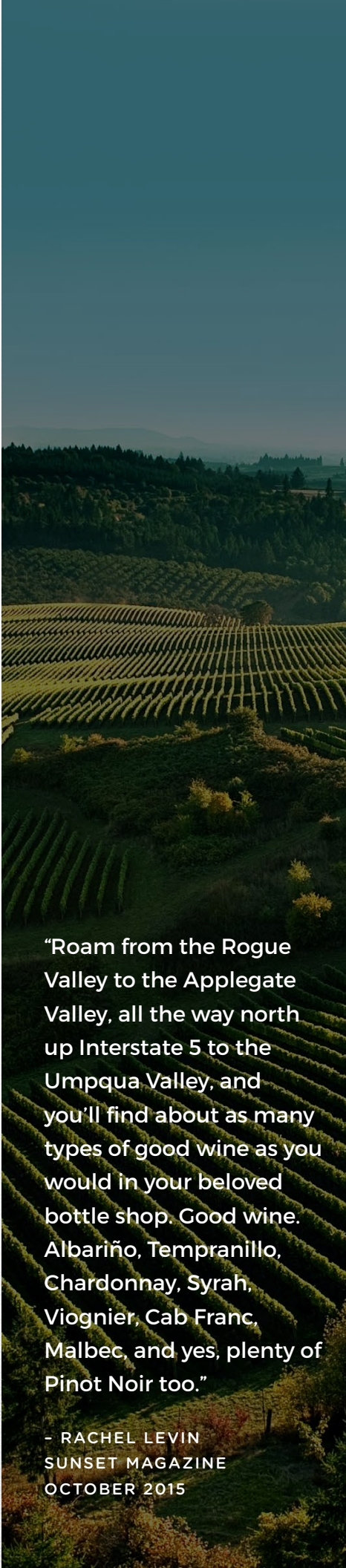
Through the strong partnership with Southern Oregon University Research Center (SOURCE), OWB continues to publish the valued annual Vineyard and Winery Report covering the harvest. [Click here](#) to read the full 2015 Vineyard and Winery Report. This report includes detailed grape pricing information by region and variety.

In a concerted effort to maximize the knowledge on technical research funded by the OWB, investigators were asked to publish an update on the status of their project, outlining what they were working on, what they had learned thus far and how this knowledge could impact the Oregon wine industry. These eight updates allowed members of our wine community to understand what work is being accomplished and how it could help their business. You can read all the 2015-16 research project updates [here](#).

2015-2016 Research Projects Funded


- Walter Mahaffee, Research Plant Pathologist at the Horticulture Crops Research Laboratory, USDA-Agricultural Research Service: *Grape Powdery Mildew Management – A Fungicide Timing and Selection Conundrum*
- Joe DeFrancesco, Assistant Professor, Senior Research, Department of Horticulture, Oregon State University: *Pest Management Strategic Plan (PMSP) for Wine Grapes in Oregon*
- Patty Skinkis, Associate Professor and Viticulture Extension Specialist, Department of Horticulture, Oregon State University: *Defining Crop Load Metrics for Quality Pinot Noir Production in Oregon*
- Patty Skinkis, Associate Professor and Viticulture Extension Specialist, Department of Horticulture, Oregon State University: *Impact of Vine Vigor, Nitrogen, and Carbohydrate Status on Fruitfulness of Pinot Noir*
- James Osborne, Extension Enologist, Department of Food Science and Technology, Oregon State University: *Formulation of Volatile Sulfur Compounds in Pinot Noir Post-Fermentation*
- Elizabeth Tomasino, Oregon Wine Research Institute, Department of Food Science and Technology, Oregon State University: *Chiral Terpenes – Threshold Determination and Sensory Impact on Aromatic White Wines*
- Laurent Deluc, Assistant Professor in grape research at the Department of Horticulture, Oregon State University: *Determine the Impact of Cluster Thinning and Cluster Zone Leaf Removal on the Hormone Content of Pinot Noir Grape Berry*
- Vaughn Walton, Associate Professor, Horticultural Entomologist, Department of Horticulture, Oregon State University: *Integrative Studies of Vector-Related Field Epidemiology for Grapevine Red Blotch-Associated Virus and Grapevine Leafroll-Associated Virus in Oregon.*

Full reports on these projects and the complete Pest Management Strategic Plan can be found on the [OWB industry website](#).



“Roam from the Rogue Valley to the Applegate Valley, all the way north up Interstate 5 to the Umpqua Valley, and you’ll find about as many types of good wine as you would in your beloved bottle shop. Good wine. Albariño, Tempranillo, Chardonnay, Syrah, Viognier, Cab Franc, Malbec, and yes, plenty of Pinot Noir too.”

– RACHEL LEVIN
SUNSET MAGAZINE
OCTOBER 2015



“Willamette Valley produces two-thirds of the state’s wine, but Southern Oregon and the Columbia Gorge are growing in size and stature.”

**- ADAM MORGENSTERN
CHRISTIE’S REAL ESTATE
MARCH 2016**

FINANCIALS

Because of the increased harvest yields in 2015, the OWB saw a 16% increase in its Grape Assessment income. This allowed OWB committees, staff and directors to continue investing in the development of marketing programs, research grant awards and educational seminars.

Expenses came in higher than expected for the production of the annual Oregon Wine Symposium, but the additional investment allowed OWB to launch the popular experimental wine tasting and bring in influential presenters such as Doug Frost MS MW, Jerry Lohr and others.

The OWB reassessed its expenses and contracts related to website hosting and maintenance, as well as media coverage curation and reporting, and was able to decrease this administrative spend by 27%.

The majority of expenses associated with the international marketing activities (totaling \$492,000) are covered by various federal grant programs, including the Market Access Program (MAP). The remaining expense of \$111,000 is partially offset by winery participation fees.

Much of the marketing program budget was invested in advancing Oregon Wine Month, which includes developing program engagement with Oregon distributors. The remaining expenses were devoted to activities for the Oregon Wine A-List Awards and the Oregon Wines Fly Free programs, as well as the consumer research study.

Grant funds from the USDA Specialty Crop Block and the Wine Country License Plate programs were used for the production and distribution of the inaugural Oregon Wine Touring Guide and development of the Oregon Wine Resource Studio, launched after the end of the fiscal year.

In order to supplement industry funds, the OWB successfully gained an expanded number of federal and state grants. During the past year, these funds added up to \$572,602.

INCOME	BUDGETED	ACTUAL
Grape Assessment (\$25/ton)	1,614,240	1,786,809
Wine Tax (2¢/gal)	307,902	304,856
Symposium & Workshops	231,000	242,845
International Marketing Fees	49,840	46,953
Grant Funding	84,350	80,441
Other Income	600	779
Total Income	2,288,432	2,463,230
EXPENSE	BUDGETED	ACTUAL
Research		
Viticulture & Enological Research Grants	314,824	314,824
Vineyard & Winery Survey	54,000	54,383
Employee Compensation	20,468	24,556
Total Research	389,292	393,763
Education		
Symposium	282,420	306,666
Seminars & Webinars	5,000	6,395
Meetings/Travel/Administration	1,000	5,655
Employee Compensation	80,640	80,777
Total Education	369,060	399,193
Marketing & Communications		
Communications (Media Relations/Website)	172,880	126,989
International Marketing (Trade Tastings/Seminars)	108,000	107,425
Event Marketing (OWM/WFF/A-List)	189,440	194,562
Marketing Collateral (Grants/Branding)	97,013	86,523
Marketing Research (HFHE)	44,000	24,000
Meetings/Travel/Administration	8,000	13,836
Employee Compensation	157,086	160,214
Total Marketing & Communications	776,419	713,549
General & Admin		
Board Administration	20,000	31,945
Grant Writing (SCBG/WCLP)	5,000	1,924
Program Sponsorship*	21,021	21,021
Office Administration (Rent/Equipment/Supplies)	102,000	106,815
Staff Administration (Meetings/Travel/Administration)	50,000	53,370
Employee Compensation	434,826	427,242
Total General & Admin	632,847	642,317
Total Expense	2,167,618	2,148,822

* 11th Annual International Terroir Congress
Oregon Wine History Archive

“The best [2014s] have a surprising transparency, and openness to their textures, rather than the density of recent hot vintages such as 2009, 2006 and 2003.”

- HARVEY STEIMAN
WINE SPECTATOR
FEBRUARY 2016

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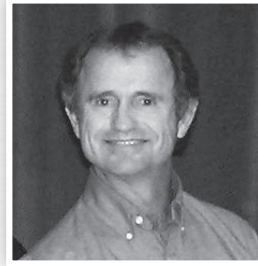
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THANK YOU TO ALL OF OUR VOLUNTEERS.

All this work would not be possible without the countless unpaid hours of dedicated time.

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