

2019-2020

ANNUAL REPORT



OREGON
WINE
BOARD

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LETTER FROM YOUR PRESIDENT

Dear Friends,

This remarkable year was unlike any other.

It embraced two time spans connected chronologically, yet punctuated by the pandemic.

Before and during COVID-19, the Oregon Wine Board's management team remained centered on industry needs and achieved milestones including:

- Another attendance record at the 2020 Oregon Wine Symposium;
- Publicity for Oregon wine quality metrics strengthening our competitive position. For example, with less than 0.2% of global production, Oregon accounted for 5% of wines listed in Wine Spectator's global Top 100;
- A new record for off-premise availability measured by Nielsen: 46%, up +13% versus a year ago;
- Maintaining the highest technical research investment ever, \$417,500;
- Designation of two new AVAs, bringing Oregon to 21.

As COVID-19 disruptions presented themselves, OWB's priorities evolved yet remained intertwined with the challenges facing wine business owners and the Board's primary strategic plan objectives:

- Further elevating the esteem in which Oregon's wines are held;
- Adding value with new learning, knowledge and insights;
- Focusing collective resources for greater impact than individual groups can achieve singularly.

Important alliances were leveraged to deliver on those objectives:

- OWB and the Washington State Wine Commission jointly sponsored media events and educational engagements;
- The New Zealand Winegrowers partnered again with OWB to target high-value international buyers;
- Closer to home, our relationship with Travel Oregon yielded timely, opportunistic press coverage and incremental program support.

Financially, the year demanded aggressive cost management. OWB expenses were carefully monitored as our program calendar shifted. For the year, operating costs were nearly 12% lower than originally planned.

In the following pages, you'll find more details on our activities. Thank you to the growers, winemakers and partners who helped us overcome unexpected circumstances and build the foundation for recovery.



Tom Danowski, President

OREGON WINE BOARD STRATEGIC PLAN 2020-2025

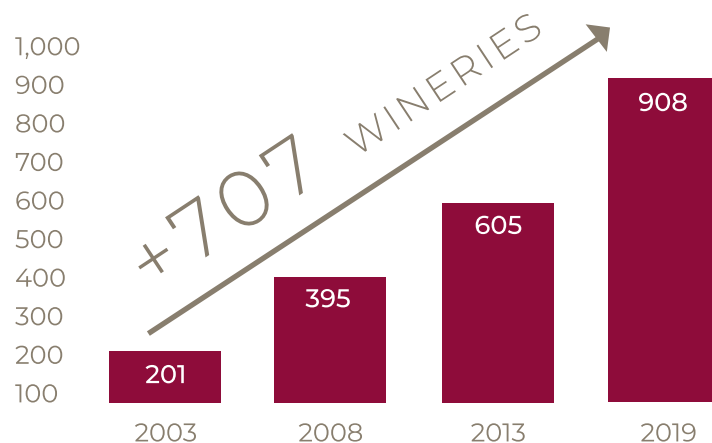
In June, the Directors of the Oregon Wine Board ratified a new strategic plan for the organization that will guide the OWB's activities and funding allocations for the next five years. Derived from a years-long process that synthesized feedback from hundreds of industry members, the plan reflects the unique position of the Oregon Wine Board as a statewide agency to help advance the industry as it grows and diversifies, and as the landscape around it evolves.

BACKGROUND

The growth and development of the Oregon wine industry since OWB's establishment as a semi-independent state agency in 2003 has been astounding:

- **Grape production expansion:** Oregon's wine grape harvest has more than quadrupled, topping 105k tons in 2019.
- **Increased competition:** There has been a more than four-fold increase in the number of wineries.
- **Outside interest:** The percent of harvested grapes not crushed by Oregon wineries has expanded from 7% to 22%.
- **Diversification and specialization:**
There are now 21 approved AVAs in Oregon, compared with 6 in 2003.

And yet, Oregon's share of U.S. wine production hovers around 1.2%, comprising about 0.15% of global wine production. Despite its growth over the past 15+ years, Oregon remains a small player, albeit one that punches well above its weight in accolades garnered from top critics and the esteem it enjoys among fine wine consumers.



In recognition of an Oregon wine industry that continues to grow and evolve—diversifying geographically, varietally, by size and by business model—the OWB identified a need to review the strategic objectives that guide its work in service to the industry.

These questions in particular drove the process:

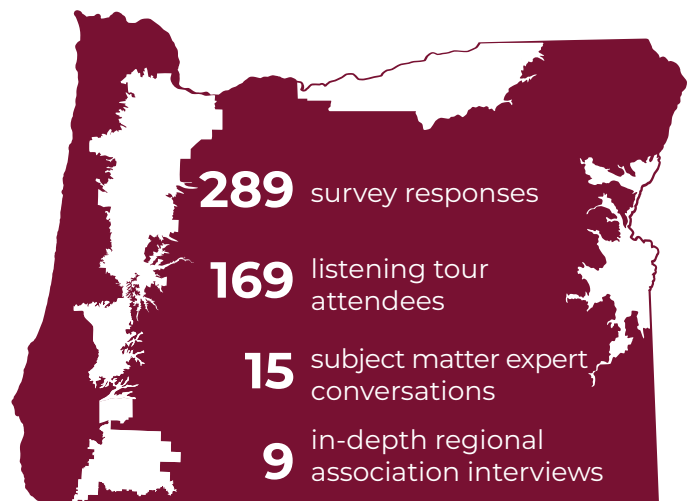
Collective impact: How can we maximize our collective statewide resources as a small player in a competitive global marketplace?

Meaningful work: How do we address the industry's most pressing needs in its current stage of expansion and diversification?

Statewide vantage point: What kind of work is best undertaken by the OWB as a statewide agency, and what is better managed by the network of regional associations around the state?

GATHERING INDUSTRY INPUT

In summer 2018, OWB began a three-phase process, delving into the strategic priorities of its two largest functions—Viticulture & Enology Research and Marketing & Communications—and the organization as a whole. Through the process, hundreds of industry members participated in listening sessions, small group conversations and individual interviews, and several hundred also responded to online surveys. OWB Directors and managers contributed their expertise. Summit-style meetings of leaders were convened in each functional area.



SYNTHESIZING

One might imagine the breadth of input received from industry members around the state. Contributors included owners of small vineyards to people who run large custom crush facilities. Among the participants were a diverse assortment of the small family-owned wineries that comprise more than 70% of Oregon wine producers: those who depend primarily on the direct-to-consumer channel, those with select domestic distribution, and those selling in multiple export markets. Representatives from well-established regions and those working to break through alike had their voices heard.

In December 2019, the Oregon Wine Board and staff convened for a day-long workshop to discuss the themes that emerged across this robust outreach process. The group spent time in deep introspection about how to focus the

organization's efforts while simultaneously expanding its impact. Importantly, the Directors and management team aligned on the importance of serving the industry with transparency. What resulted was the first draft of the new strategic plan for the Oregon Wine Board that has now been finalized and can be found on the following page.

SHARING

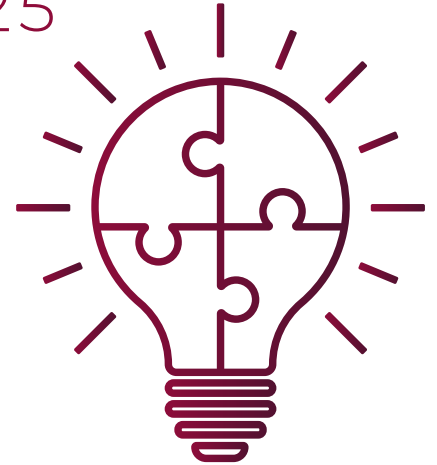
An overview the strategic plan's three pillars was presented at the Oregon Wine Symposium in February to an audience of more than 900 industry members. In late spring OWB held six meetings with industry representatives from around the state to present the more comprehensive plan and gather any final input about the direction in light of COVID-19. The OWB management team has since been focused on espousing the principles outlined in the plan as well as aligning the the 2020-21 annual operating plan and budget to support the strategic objectives.



OREGON WINE BOARD STRATEGIC PLAN 2020-2025

VISION

The Oregon Wine Board firmly believes that a rising tide lifts all boats. In its unique statewide position, the Oregon Wine Board is critical partner to the Oregon wine industry, working to raise the tide by cultivating an environment in which our grapes and wines are coveted, winegrowers and producers are well-equipped to compete, all people are treated with equal respect, and all are buoyed by our industry's collective success.



STRATEGIC PRIORITIES



ENHANCE THE REPUTATION OF OREGON WINE

Define, protect and promote the reputation of Oregon wine globally

- Establish a well-defined Oregon Wine brand with focused messages, attributes, and brand guidelines
- Promote statewide alignment to amplify and ensure consistency of brand message to external audiences
- Increase global awareness of the quality and breadth of the Oregon wine category
- Fuel research that sustains and advances wine and grape quality



DELIVER KNOWLEDGE & INSIGHTS

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

- Commission and curate technical, business and market research to advance industry practices
- Be the experts on the Oregon wine industry in support of telling its stories and communicating its impact
- Make data and insights easily accessible to industry members at all times
- Leverage funding and maximize knowledge-sharing through partnerships in research and education



PROVIDE LEADERSHIP & PARTNERSHIP

Harness statewide strength to unite and empower the Oregon wine industry

- Prioritize activities that will have greatest impact on the advancement of the statewide industry
- Establish development opportunities for regional associations appropriate to their lifestage needs and in service to the advancement of Brand Oregon
- Institutionalize venues for cooperation and input-gathering among regions and other industry groups

SUCCESS REQUIREMENTS

Transparency:

Achieve clear priority-setting, transparent resource allocation, and unambiguous communication

Strategic partnerships:

Create strong partnerships with wine and industry-tangential organizations to amplify our work

Professional development:

Sustain and grow capabilities through professional enrichment and continuing education opportunities

Metrics of success:

Institutionalize a process for tracking and communicating progress through measurable metrics

STRATEGIC PRIORITY 1

ENHANCE THE REPUTATION OF OREGON WINE

8

The Oregon Wine Board will define, protect and promote the reputation of Oregon wine globally

While many of the Oregon Wine Board's activities work to build the reputation of Oregon wine, OWB's marketing and communications programs most directly address this organizational priority.

MARKETING & COMMUNICATIONS STRATEGIC PRIORITIES



1. Brand Equity

Elevate the esteem of the Oregon Wine brand globally



2. Wine Tourism

Champion high value, engaged and sustainable wine tourism statewide



3. Market Expansion

Build multi-tier trade demand to generate growth opportunities



4. Insights & Integration

Enrich industry intelligence, dialogue and alignment

BRAND EQUITY

BRAND IDENTITY DEVELOPMENT

The first major new initiative in service to the Marketing & Communications Strategic Plan is the development of an updated brand identity for Oregon Wine. In spring 2020, OWB was pleased to be awarded a \$50,000 grant from the Oregon Wine Country License Plates Matching Grant program, administered by Travel Oregon, to help fund this foundational brand work and enhance the industry's tax dollars.

After a robust search, OWB selected research-based branding agency Watson Creative to produce a modern and competitive statewide brand identity. Once complete, the resulting identity will be used to refresh all OWB consumer programs, communications and website. It will also inform OWB's trade and industry tone and branding. Watson Creative's first phase of work will invite industry input from regional associations, businesses and individuals to ensure that the process is informed, collaborative and transparent. Work is underway and will continue through the end of calendar year 2020.

CONSUMER COMMUNICATIONS

The Oregon Wine Board shares programs, offerings, industry events and other relevant news to a broad consumer audience thorough web, e-newsletter and social media channels. A range of compelling program content is featured on oregonwine.org and a digital trip-planning directory is offered at visit.oregonwine.org. The latter hosts more than 550 tasting room listings, making it easy for users around the world to plot itineraries by geography, grape variety, region and dozens of other filters. In the past year, site analytics show a 26% increase in users, while the most popular tasting room search filter was “dog friendly.”

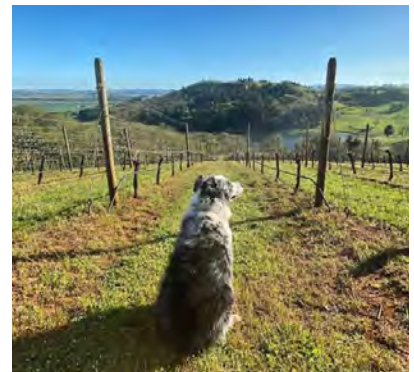


Photo: Jenny Burger (@j_burgs)

More than 38,500 wine drinkers are counted across OWB's Facebook, Instagram and Twitter accounts. The OWB's consumer e-newsletter subscriber base reached more than 43,500 Oregon wine fans—an increase of 28% over the previous year—who receive email from OWB about twice each month. The e-newsletter enjoyed a strong 25% open rate and 5% click-through rate, a testament to reader engagement with the content provided.

OREGONWINE.ORG WEBSITE TRAFFIC BY THE NUMBERS 2019-20

76,275
unique users

164,561
pageviews

92,228
sessions

2:10
minutes spent per
session on tasting
room listing site

USER LOCATION

All other 29%

IL 3%

NY 4%

FL 4%

TX 4%

WA 10%

CA 12%

OR 36%

54 days of site usage in late winter 2020 (estimated to be 17% of annual data) is missing from statistics

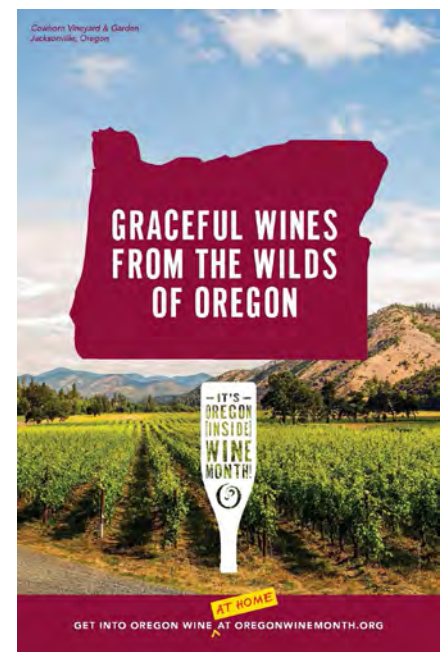
OREGON [INSIDE] WINE MONTH

After a thorough program audit in fall 2019, Oregon Wine Month 2020 was planned to be scaled back to conserve resources and allow time to holistically reimagine the program for 2021. In the lead-up to May, COVID-19 forced even further changes to Oregon Wine Month plans.

Oregon Wine Month has historically been a period of increased trade and consumer activity punctuated by tactical winery promotions. Designed to address Oregon's barriers to growth—trial and awareness—traditional Oregon Wine Month programming quickly became incongruent with the social distancing COVID-19 required. Fortunately, most Oregon Wine Month investments were fluid and able to be reallocated to the new Bring #OregonInside and Oregon Vine Perks programs and reserved for future spending.

Historically, Oregon Wine Month messaging begins as early as March. For 2020, an invitation to “keep in touch while we’re temporarily apart” was used to entice consumers in Oregon and around the country to Bring Oregon Inside. This pivot was followed by new graphics for use by OWB and the industry, as well as a new [#oregoninside program page](#) on OWB's consumer-facing website. This new program page aggregated regional direct-to-consumer offers, charity efforts and other content appropriate at the outset of the pandemic to support online sales and Oregon's broader wine and culinary communities. This program page received 9% of all traffic to OWB's consumer site through May, had an average time on page of 2:09, and provided a bridge between early pandemic closures, remaining Oregon Wine Month programming, and the eventual reopening of tasting rooms.

As in years past, OWB shipped printed point-of-sale materials to distributors across the country. While many distributors suspended their promotional programs at the last minute, 18 distributors in 10 states received their shipments



and dispersed items to retail accounts that remained open.

To keep Oregon top of mind nationally, the Oregon Wine Month sweepstakes continued as planned. This provided an opportunity to invite consumers to dream about future Oregon wine country visitation. Through paid social media, dedicated e-newsletters, organic posts and partner promotion, more than 15,000 sweepstakes entries netted nearly 13,000 new readers to OWB's e-newsletter subscriber base. At an acquisition cost of \$0.62 per entrant, this promotion was again a cost effective way to grow OWB's list of consumer contacts.

For more on Oregon Vine Perks, see page 15.

MEDIA RELATIONS

Inbound Tours

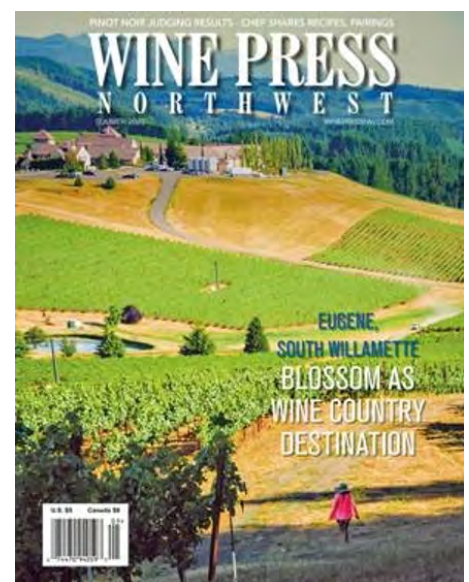
Oregon Wine Board's media relations efforts in 2019-20 began with the annual statewide summer media tour in late July 2019. Four writers joined the tour, including writers from Edible Communities; The Virginian Pilot, whose writer will return to Oregon in August 2020 on assignment; a freelance writer from Florida; and Sophie McDonald Bennett, a national writer based in Eugene whose article in the Register Guard on Sweet Cheeks Winery spurred on a notable bump in traffic to their tasting room. A photographer from Oregon Wine Press also joined the tour, netting the below photo of King Estate on the cover of Wine Press Northwest.

To date, nine stories have emerged from the summer tour, with each of the writers submitting at least one published piece. As often happens on OWB media tours, the writers are still in touch with each other, have visited each other's homes and have since collaborated on articles together.

To help marry messaging of Oregon premium wines and travel, in February OWB hosted a dinner with Travel Oregon that included 11 media members. These writers are contributors to a broad variety of outlets including SevenFifty Daily, Bon Appetit, Wired, Portland Monthly, the

"It was a great itinerary, an exceedingly nice group, and very informative. Oregon is a special part of the country ... I was able to include some of the wines we tasted and an IPNC reference in a piece about tumbler wines."

- SOPHIE MENIN, EDIBLE COMMUNITIES



Wall Street Journal, Imbibe Magazine, The Oregonian, O: The Oprah Magazine, Sunset and many others.

In addition to its focus on travel, the dinner also featured Biodynamic® wines from around Oregon. According to Demeter, Oregon had 10 certified wineries as of 2019; more than half of them poured at the dinner. The writers tasted beautiful wines while speaking with winemakers committed to Biodynamics including Analemma, Cooper Mountain, Cowhorn, King Estate, Montinore and Troon.

Although the primary focus of the dinner was to build relationships with the writers, three articles were subsequently published: two on Biodynamic wines in the Wine Industry Advisor and Travel Oregon and one about cycling and travel in the Oregon Wine Press.

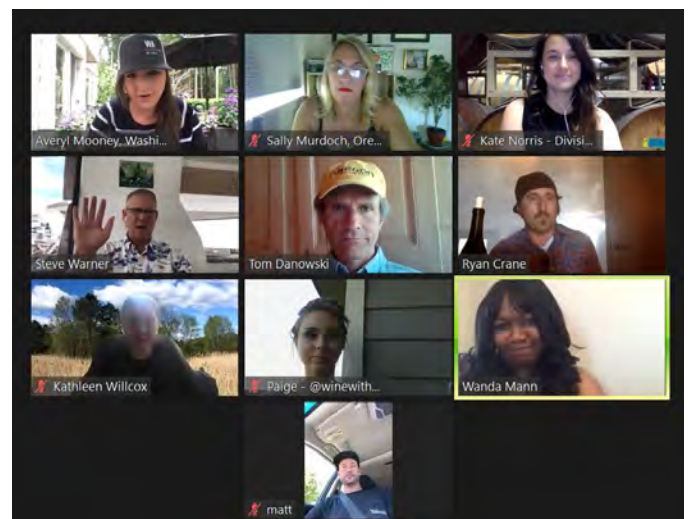
Virtual Tours

While spring and summer are often busy periods for hosting writers in Oregon, 2020 required a different approach. OWB media relations efforts pivoted to hosting virtual events and sending wine to reviewers to taste and review from the safety of their homes. The inherent promise is and always will be, “Join us in Oregon when the coast is clear.”

While it wasn’t possible for media to come to Oregon this spring, the OWB and Washington State Wine Commission continued with plans to host the 4th annual cross-border AVA media tour—but with a twist.

For five consecutive days, six members of the media met with winemakers from the two states for more than an hour each day in an engaging format that one writer called, “The best Zoom call I’ve ever been on.” The composition of the group was intentionally diverse, including four women, two people of color and writers from large media outlets on both coasts.

In June, OWB PR efforts were largely devoted to tasting rooms reopening after the pandemic shutdown. A number of press releases were issued when



Wine writers in attendance: Kathleen Willcox, Paige Comrie, Maria Hunt, Wanda Mann and Matt Bean

tasting rooms began to open their doors for onsite hospitality to help visitors navigate their options and anticipate changes to their wine tasting experiences. To support its partners, OWB developed a press release template for use by regional associations, and many used this to issue their own statements.

Wine Reviewers

Wine reviewers rating Oregon wines this year included Nick Stock from JamesSuckling.com, Erin Brooks from the Wine Advocate, and Charles Curtis MW from Decanter.

Nick Stock's January visit marked his third in 18 months. The people have been just as enticing to him as the wines: "Many variables influence winemaking here but the most exciting at the moment is the human factor." The report published after his visit this year offered glowing reviews of the state's Pinot noirs and Chardonnays. Top scoring wines—both rated 98 points—were Antica Terra's 2017 Pinot Noir Antikythera and Cristom's 2005 Jessie Vineyard Pinot Noir, the latter underscoring the aging potential of Oregon wines.

In April, the Wine Advocate published reviews of the 2017 vintage from Erin Brooks' July 2019 visit. Brooks awarded 90+ points to 63% of the 801 wines she tasted, her highest proportion of 90+ scores in an Oregon tasting to date. The highest scoring wine from this tasting was 2017 Pinot Noir Richard Hermann Cuvée from OO Wines.

The Decanter story, due out in September 2020, was compiled by Master of Wine Charles Curtis, whose planned visit shifted to a virtual one. Charles collected enough samples to conduct a well-attended virtual tasting via Instagram, shining a spotlight on nearly one dozen Oregon Chardonnay producers.

Wine Spectator's coverage of Oregon this year included a cover story, "Oregon's Pinot Power." Additionally, five Oregon wines landed on [Wine Spectator's 2019 Top 100 list](#).



Nick Stock tastes Oregon 2018 Pinot noir



WINE TOURISM

OREGON WINE TOURING GUIDE

In February, a refresh of the Oregon Wine Touring Guide [digital flipbook](#) was released with updated maps and tasting room listings. This edition included the same strong editorial content of the printed guide, most recently published in February 2019. The Touring Guide continues to be one of OWB's most visible tourism assets and is designed to educate wine consumers, inspire travelers and locals alike, and of course facilitate travel around Oregon's varied regions.

The fourth edition of the printed Touring Guide is available free of charge to individuals around the country and businesses throughout the Northwest.

From launch in 2019 through June 2020, consumers in 50 states had requested more than 6,500 individual copies. An additional 25,000 copies were distributed to more than 500 Oregon wineries and tourism businesses and another 22,000 were placed in hotel racks and other tourism hot spots for pickup. The digital guide has been viewed more than 4,500 times for an average duration of 11:15. In total, Oregon wine consumers around the country spent 845 hours exploring Oregon through the digital guide online.

Looking forward, OWB has begun production on the 2021-22 Oregon Wine Touring Guide with a new publishing partner, MEDIAmerica. In addition to serving many other clients, MEDIAmerica produces the statewide visitor guide for Travel Oregon and brings deep experience in tourism-driving assets to the relationship. As part of the editorial process, the industry was invited in June to contribute story ideas for the next publication. While the consideration window for the next guide has closed story ideas are accepted year round via the [Oregon Wine Touring Guide toolkit](#).

In concert with MEDIAmerica, OWB is committed to ensuring a diverse representation of writers, models and story subjects so that readers nationwide will see and hear from diverse perspectives. The fifth print edition is slated for release in April 2021.



Oregon Wine Touring Guide, 2019-2020

OREGON VINE PERKS

[Oregon Vine Perks](#) is a new consumer loyalty program developed to inspire sales of Oregon wine during COVID-19 stay-at-home orders, and visitation once tasting rooms reopened.

Any consumer who spent \$250 or more on Oregon wine between May 1, 2020, and Sept. 1, 2020, could upload receipts and receive an Oregon Vine Perks Pass in the mail. Vine Perks Pass holders will be able to show their pass at participating wineries around the state to unlock 2-for-1 tastings, discounts and VIP benefits through April 30, 2021. Every winery in Oregon was eligible to be featured in the program free of charge, and 161 wineries have enrolled with each winegrowing region represented. In total, more than 650 consumers received Oregon Vine Perks passes. The vast majority of pass holders live in Oregon.



OREGON WINES FLY FREE

Established in 2013, the Oregon Wines Fly Free program is a partnership between the OWB, Travel Oregon and Alaska Airlines. Oregon Wines Fly Free allows Alaska Airlines Mileage Plan™ members to check up to one case of wine for free when departing any Oregon airport, as well as receive a complimentary tasting at any participating winery. The program aims to incentivize tasting room visitation with complimentary tastings and case sales with waived baggage fees.

OWB continues to work with its partners to seek effective ways to promote this one-of-a-kind program, and all partners remain committed to the program with no end in sight. This year, print advertising to promote the program was secured in the Travel Portland Visitor Guide (180,000 copies) as well as the Oregon Wine Touring Guide (70,000 copies). Additionally, OWB distributes several thousand Oregon Wines Fly Free flyers in the Portland International Airport's Visitor Welcome Center annually. Digitally, Travel Oregon regularly mentions the program in online articles at traveloregon.com. Oregon Wines Fly Free features 367 participating wineries representing all of Oregon's winegrowing regions. Wineries can enroll and order printed tasting room material via the [program toolkit](#).



MARKET EXPANSION

TRADE RESOURCES AND COMMUNICATIONS

The [Oregon Wine Resource Studio](#) is a sales and training resource developed for members of the Oregon wine industry and those who support it. This mobile-friendly website contains a comprehensive suite of information and assets that illustrate the distinctive aspects of terroir, history and culture that combine to make Oregon a world-class winegrowing region.

The Resource Studio is the most current source of information for the Oregon Wine industry. Living up to its mission, within a week of the June approvals of the new Laurelwood District and Tualatin Hills AVAs, the Resource Studio incorporated a page for each AVA with regional statistics and newly commissioned maps.

RESOURCE STUDIO BY THE NUMBERS 2019-2020

9k
users

76%
new users

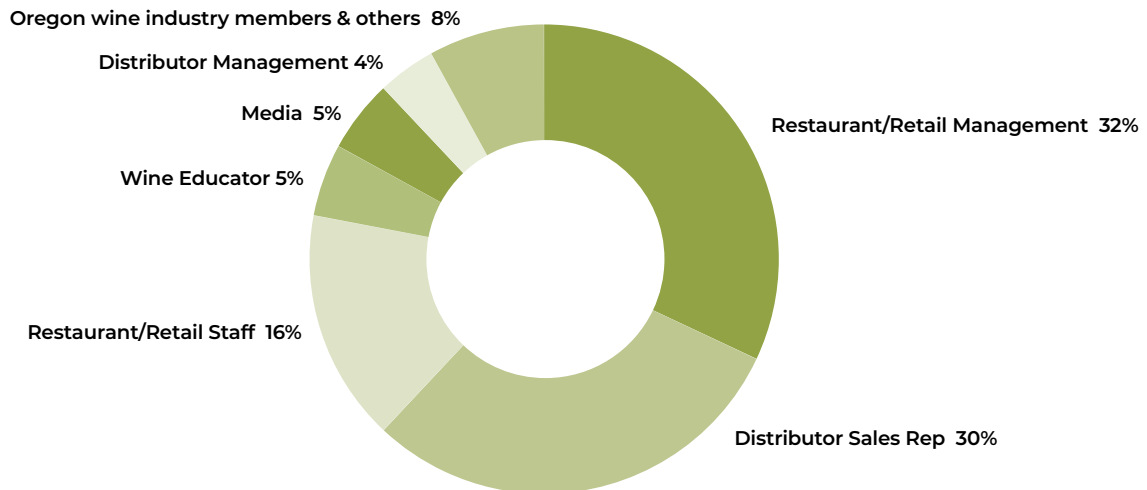
24%
return users

35k
pageviews

1,400
downloads

All users who download content from the Resource Studio opt into the OWB's trade newsletter list. With a recent update, this database of valuable contact information was refined and optimized. Users can now update their email profile, allowing the OWB to better understand and segment its trade audience. Of more than 7,000 trade contacts, about half have updated their profile.

TRADE AUDIENCE COMPOSITION:



LEARN OREGON

Learn Oregon is a 4-week online training using the most up-to-date and comprehensive information only the Oregon Wine Board can provide. Delivered via e-mail and offered throughout March, topics included Oregon Wine 101, environmental stewardship, labeling regulations and selling Oregon wine.

In Spring 2020, 721 people from around the world enrolled in Learn Oregon, representing diverse positions within the wine industry including buyers, distributor reps, media and winery staff. Due to the program running as the COVID-19 pandemic was unraveling, the completion rate was lower than the year prior. Nonetheless, 64 people completed the program and received a certificate.

OWB will be developing an updated version of Learn Oregon in 2020-21 to improve the user experience and allow the course to be taken anytime during the year.

OREGON WINE TRAIL EVENTS

An integral part of the OWB's Market Expansion efforts is a series of trade education and consumer engagement events in markets where category development data and Oregon brand availability confirm good potential for increased Oregon wine sales.

The creative concept for these events is "Oregon Wine Trail," invoking imagery of Oregon as a region of discovery and including design features

evocative of a visit to Oregon's wine country. Attendees are invited to explore the wines of Oregon along different trails such as Sustainably Grown and Diverse Whites. A handful of Oregon food purveyors are invited to showcase the food-friendliness of Oregon wines, drawing on the reputation that Oregon has built as a culinary destination.

In March 2020, OWB hosted its third domestic Oregon Wine Trail event, this time in San Francisco. Due to the ongoing uncertainty related to COVID-19 and expiring grant funding, the OWB made the difficult decision to pivot the final planned Oregon Wine Trail event from an in-person experience in Seattle to a virtual master class for media and trade. The class will be hosted in winter 2021 and is currently under development.



Domestic Oregon Wine Trail events are funded by a Specialty Crop Block grant from the U.S. Department of Agriculture and Market Access funds awarded by the Oregon State Legislature.

Oregon Wine Trail: San Francisco

On March 4, Oregon Wine Trail took over Terra Gallery in San Francisco for a day of Oregon wine tasting and learning. The event began with a trade master class entitled: *3 Masters, 2 Varieties, 1 State*. The class presented a multi-faceted discussion of Oregon's AVAs to 107 influential members of the trade

OREGON WINE TRAIL: SAN FRANCISCO



69%

Trade attendees reported they were "more likely to add Oregon wine to their business"



83%

Consumer attendees agreed they were "more likely to visit an Oregon wine region"



87%

Winery representatives reported they were satisfied or very satisfied with the event overall



91%

Winery representatives agreed they would participate in future Oregon Wine Trail events

and media. Eleven of Oregon's AVAs were represented through the lens of Pinot noir and the emerging Chardonnay movement that has captured the attention of critics around the country.

Following the master class, a walk-around tasting was attended by 270 trade and media professionals. To close the evening, a consumer walk-around tasting hosted another 270 guests.

As with other Oregon Wine Trail events, winery participation was open on a first-come, first-served basis with a regional quota imposed by the OWB to ensure diversity of representation. Representatives from 52 Oregon wineries of all sizes joined OWB in San Francisco.

"The master class was fantastic. I could sit through the same class again and would learn more. Packed with good information."

**- MASTER CLASS AND
TRADE TASTING ATTENDEE**

TEXSOM PARTNERSHIP

On Sunday, Aug. 18, for the third year in a row, the OWB hosted a lunch at the annual TEXSOM conference, which is considered by many to be the most prominent and influential wine trade education conference in the U.S. The conference attracts top wine buyers and offers seminars, networking opportunities and rare chances to taste premium wines from around the world.

OWB's sponsored lunch was attended by 175 TEXSOM volunteer sommeliers who were helping with wine service and logistics at the conference. Volunteers must apply and be selected by TEXSOM conference organizers for their professionalism and wine service experience. The majority were fine wine restaurant buyers studying for the Court of Master Sommelier exams and hailed from around the country.

At the lunch, OWB Education Manager Bree Stock MW gave a 15-minute overview of Oregon's diverse climates and geology through the lens of seven white wines of different varieties from the Willamette Valley and Southern Oregon. All of the wines showcased at the lunch had received high scores at the 2019 TEXSOM International Wine Awards (TIWA).

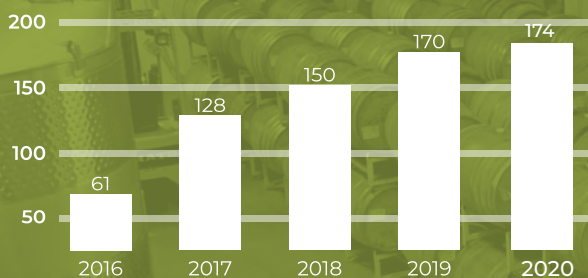
The TIWA competition, held annually in February, provides TEXSOM organizers exposure to wines and winegrowing regions through competition submissions. This subsequently influences the content presented at the



TEXSOM conference. To increase the presence of Oregon wines at future TEXSOM conferences by expanding Oregon's participation in TIWA, OWB continued encouraging wineries to enter the prestigious awards program by removing the barrier of shipping costs.

In 2020, award-winning Oregon wines increased to 174 from 170 in 2019. Most notably, Oregon wines honored with the top Gold award increased a staggering 140% this year with 24 Gold awards bestowed. Coveted TIWA Gold medals were only awarded to 12% of wine submissions.

OREGON'S 2019 TEXSOM INTERNATIONAL WINE AWARDS RESULTS



13
Oregon
AVAs



19
Varieties



10
Gold
Medals

INTERNATIONAL MARKETING

Globally, the awareness of Oregon wine continues to grow due to the reputation of Oregon as a world-class wine producing region. Leveraging the unique funding structure for OWB's international program as part of the Northwest Wine Coalition (NWC), OWB hosted events including trade shows as well as with key members of the international trade throughout the year. The OWB receives funding from the U.S. Department of Agriculture's Market Access Program as well as money from targeted grant opportunities, which are allocated for the promotion of Oregon wines outside the U.S. OWB also partners with Washington State Wine through the NWC to fully leverage these funds by sharing market agents, event costs and travel expenses.

In-Market Activities

As in years past, OWB saw an increase in interest and participation in its international programming. The U.K. continues to be a strong market for Oregon wines with more than 60 wineries represented. The interest in Oregon wines showed when OWB, along with the state wine associations of Washington, California and New York, hosted a U.S.A. master class in London in November. This event, emceed by Victoria Stephens-Clarkson MW, was an example of how OWB utilizes targeted grants for the promotion of Oregon wines. It was a first-of-its-kind collaboration between all four major U.S. wine-producing regions and was deemed a success by attendees for its uniqueness and wine quality. Oregon wines were mentioned as the favorites for most of the 25 attendees, who were hand-selected members of the trade and media. This tasting also served to help identify the strongest trade candidates to attend a future multi-state inbound tour.

Also in November, OWB Director and chair of the international marketing committee, Bob Morus from Phelps Creek Vineyards, and Marie Chambers, OWB vice president of finance and operations, were invited to join Governor Kate Brown's trade mission to South Korea and Japan as representatives of Oregon's wine and agricultural sectors. The latest publication from the Oregon Department of Agriculture ranks wine grapes seventh in Oregon's agriculture commodities. Japan and Korea are two important international markets for Oregon wine exports; Japan is Oregon's second largest export market after Canada. Many Oregon wineries have had strong relationships with Japanese importers for more than 15 years, and these long-term partnerships are important to building global recognition and appreciation for Oregon wines.

In late January, OWB hosted its inaugural Mexico City tasting. Representatives from 17 Oregon wineries made the trip to pour their wines for nearly 200 trade professionals. Prior to the main tasting, OWB hosted a VIP tasting targeted at wineries looking for representation as well as an Oregon 101 seminar. The seminar was packed to standing room only, which highlighted the level of interest in learning more about Oregon wine. This enthusiasm was echoed by the main tasting attendees who were thrilled not only to have Oregon wineries visiting their market, but also to taste wines from all over the state including the



The inaugural Mexico City tasting.

Willamette Valley, Columbia Gorge and Southern Oregon. Because of the positive response from attendees and wineries alike, Mexico will become a new developing target market for OWB's international strategy.

Another new effort in the past year was the creation of the Northwest Wine Certification Program, a partnership between OWB and Washington State Wine. The curriculum includes two levels of certification and is designed to integrate into existing trade and consumer wine education programs. Level One was introduced in February to students in Tokyo, Japan, and Seoul, South Korea, with a two-day course developed and conducted by Bree Stock MW. The students comprised 78 wine educators, trade professionals and media members who were successfully certified as Northwest Wine Specialists. Level

Two of this program is currently being built and OWB will look closely at these inaugural markets as well as others in Asia to drive this deeper level of Northwest wine knowledge and appreciation. Work is ongoing with wine educators to successfully embed the program into existing curricula.

Spring 2020 was supposed to be full of programming in global markets, but due to the coronavirus pandemic much of this programming has been put on hold. OWB and Wines of New Zealand were able to shift the planned Wines From The Edge master class from an in-person event to a virtual master class with 50 hand-selected trade members in London. The group included many Masters of Wine and key media influencers. The feedback was extremely positive, the format was praised for its inventiveness, and the wines were received with high accolades.

Inbound Activities

In late summer 2019, OWB hosted a group of eight top Japanese wine trade for the biennial Harvest Tour. The attendees were from all sectors of the trade—retailers, importers, sommeliers and media—and were selected because of their proven support of both Oregon and Washington wines. The tour covered the Columbia Gorge and the Willamette Valley with the intention of traveling to Southern Oregon as well, however fires in the area necessitated that portion



Students at the South Korea Pacific Northwest Wine Certification course

of the tour be canceled. To ensure Southern Oregon wines received their well-deserved exposure, OWB hosted a small, informal tasting of wines from the region. Overall, eight wineries were visited and wines from more than 20 producers were sampled by this prestigious group.

Postponed Activities

Unfortunately, many events in OWB's international marketing activity calendar were impacted by the pandemic and have been postponed. These included inbound tours, such as the International Summer Tour and U.K. Sommelier Tour, and in-market events, such as ProWein, a master class in Sweden, a Moscow tasting at the U.S. embassy, tastings in Toronto, Montreal and Calgary, and a tasting with the Liquor Control Board of Ontario.



INSIGHTS & INTEGRATION

CONSUMER INSIGHTS

Oregon Winery Visitor Profile Study

At the beginning of the 2018-19 fiscal year, OWB contracted with the University of Oregon's Institute for Policy Research and Engagement (IPRE) to conduct research to develop profiles of winery visitors in three of Oregon's major wine tourism regions*: Columbia Gorge, Rogue Valley and Umpqua Valley. By partnering with regional associations, wineries and tourism organizations in those AVAs, the research team collected more than 5,000 responses to a comprehensive survey throughout fall 2018 and winter 2019.

While the majority of this work was completed prior to the start of the 2019-20 fiscal year, the [final report](#) was refined and published in fall 2019. In addition to describing characteristics of winery visitors such as their demographics, travel behaviors, spending habits and perceptions of each wine region, the report includes broader findings from the IPRE team's research beyond this study. This work includes emerging trends in winery tourism and specific preferences and behaviors that wine industry and travel professionals should consider as they work to strengthen Oregon's wine sector.

**The Willamette Valley Wineries Association commissioned a similar study specific to their region, conducted by travel research firm Destination Analysts. That report can be found [here](#).*



Photo: John Valls Photography

MARKET INSIGHTS

National Retail Sales

In March, OWB published a [market insights report](#) comprising an overview of the Oregon wine category's performance in off-premise retail accounts in 2019 using Nielsen data. The report included a snapshot of 18 U.S. markets and five retail price segments, revealing growth in the national retail marketplace that continues to outpace both the overall table wine category and other major wine producing states.

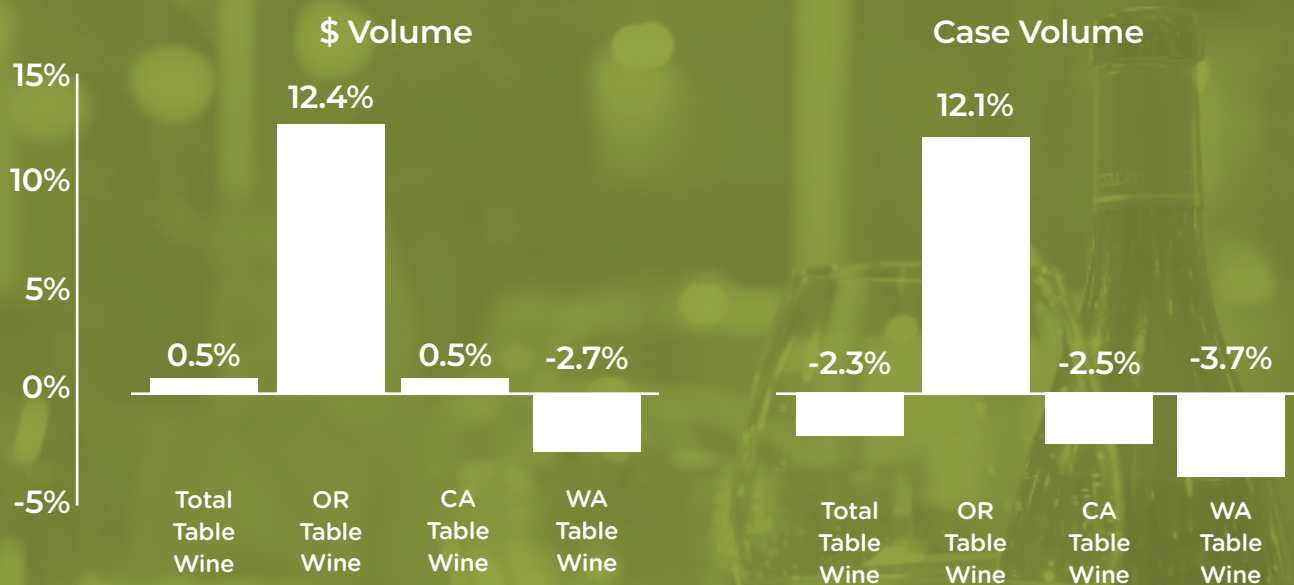
STRATEGIC PRIORITY 1

ENHANCE THE REPUTATION OF OREGON WINE

25

The data reflect sales from 346 Oregon wine brands and account for just over a quarter of Oregon wine sold across all channels globally. This information provides a directional indication of the vibrancy of the premium wine category and Oregon's position within it. The OWB makes the information available to Oregon wineries for use in conjunction with other market intelligence for crafting presentations and developing business plans.

NATIONWIDE CATEGORY GROWTH IN RETAIL OUTLETS



Source: Nielsen, Total US xAOC + Liq Plus, 52 w/e 12/28/19

DELIVER KNOWLEDGE & INSIGHTS

The Oregon Wine Board will advance the industry's collective intelligence in support of growing, making and selling quality wines

INDUSTRY EDUCATION

OREGON WINE SYMPOSIUM

Each year, OWB produces the [Oregon Wine Symposium](#), the premier wine industry education event in the Pacific Northwest, while the Oregon Winegrowers Association delivers a corresponding trade show. For two days in February, industry members gather at the Oregon Convention Center in Portland for rich learning and networking opportunities.

Educational content for the 2020 Symposium was presented across three tracks: Viticulture, Enology, and Sales & Marketing. Business Planning workshops featured accounting lessons and tutorials on the Oregon Wine Profit Planner, while the Direct-to-Consumer Roundtable offering was expanded to two sessions in its second year. General session speakers included the ever-popular Rob McMillan of Silicon Valley Bank, who returned to report on the State of the Wine Industry, and Dr. Greg Jones of Linfield University, who presented his perennially favorite Climatology Report.

The 2020 Symposium had the highest attendance to date with 1,536 Full Access attendees. Moreover, Spanish Interpretation registrations nearly doubled to 77. Attendees responding to the post-event survey reported high levels of overall satisfaction, rating the event 8.5 out of 10.

To continue to evolve the educational offerings at future Symposia, OWB's Education Committee has expanded to become more representative of the industry and invite a greater diversity of perspectives. In response to the new landscape formed by COVID-19, the 2021 Symposium will be conducted in a virtual format that will span four days.



Photos: CWK Photography

FINANCIAL TOOLS AND ACCOUNTING EDUCATION

The [Profit Planner](#) is a web-based tool designed to empower small vineyards and wineries to make business decisions—from pruning to pricing to packaging to personnel—that positively impact their bottom line. The Profit Planner was updated in 2020 to a more user-friendly format in partnership with the developers at Wine Business Education. Thanks to underwriting by the OWB, Oregon growers and producers can access this tool free of charge, a value of \$99 annually. There are currently 450 registered users within the Oregon wine industry.

To further the financial understanding of industry members, throughout January, OWB partnered with wine industry accountants at CraftedERP to deliver a series of webinars in basic finance and accounting. This series culminated in a seminar at Symposium attended by 85 industry members.



Oregon Wine Profit Planner Brochure

DIRECT SALES AND HOSPITALITY EDUCATION

In response to continued industry requests for more training for staff working in direct-to-consumer roles, OWB sponsored in-person and online trainings with WISE Academy and VingDirect.

OWB worked with WISE Academy to sponsor an Advanced Tasting Room Management seminar prior to the Oregon Wine Symposium in February. The workshop was heavily subsidized by the OWB and was attended by 100 industry members, with representation from each major AVA. Survey satisfaction was some of the highest seen with 98% of respondents stating they were highly likely to recommend the workshop to a colleague, plan to implement the workshop learnings in their business, and will seek more workshops like these when offered.

In response to stay-at-home measures implemented nationwide during the spring, OWB engaged VingDirect to offer online education training for tasting room managers and staff during May and June. OWB's sponsorship enabled industry professionals to access six modules for \$25 per course, a value of

\$199-\$399 each. Subjects offered included Virtual Tastings 101, Converting Wine Club Members, Reaching Out to Customers Online, Advanced Sales Boot Camp, and Managing Through a Crisis. More than 150 industry members took advantage of the discounted classes.

Finally, in June WISE Academy conducted three Oregon Tasting Room Forums in response to tackling reopening challenges during COVID-19. The three Zoom meetings were attended by 90 Oregon tasting room managers from across all regions. The recap of these meetings can be found on the [COVID-19 Toolkit](#) under DTC Education Resources.

INDUSTRY INSIGHTS

VINEYARD & WINERY REPORT

In September, the OWB published the [Vineyard & Winery Report](#) providing an overview of the 2018 harvest and illuminating growth within the Oregon wine industry over the preceding year. For the second year, data collection and analysis were conducted by a team of researchers at the University of Oregon's Institute for Policy Research and Engagement.

2018 OREGON VINEYARD & WINERY REPORT

Planted Acreage
35,972
 acres



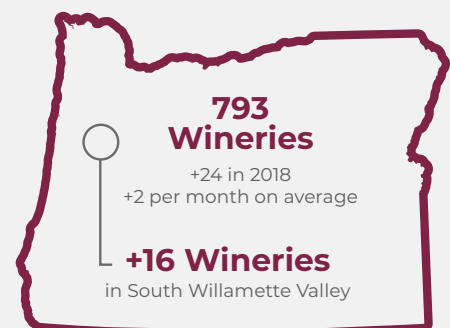
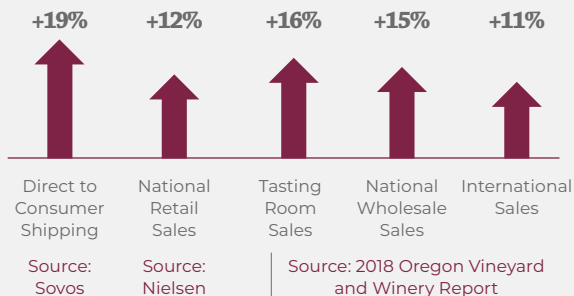
Wine Grape Production
100,360
 tons



Value of Grape Production
\$208 M



Sales growth across channels reflected the increasing demand for Oregon wine.



Source: 2017 and 2018 Oregon Vineyard and Winery Report, University of Oregon's Institute for Policy Research and Engagement (IPRE)

VITICULTURE & ENOLOGY RESEARCH

Providing funding to scientists focused on winegrape and wine research has long been a core pillar of the OWB's service to the industry. In the 2019-20 fiscal year, OWB granted \$417,500 to researchers working on deepening knowledge of and developing solutions for the most pressing and emerging challenges faced by Oregon grape growers and winemakers.

These projects align with the four areas of strategic priority for viticulture and enology research, as outlined by industry leaders and adopted by the Oregon Wine Board in late 2018.

STRATEGIC PRIORITIES FOR VITICULTURE & ENOLOGY RESEARCH



1. Wine Quality

Support advancements in wine quality and site expression by enhancing markers of quality in the vineyard and winery



2. Sustainable Production

Lead in developing sustainable practices to minimize inputs and reduce impact



3. Climate Change

Facilitate adaptation of vineyard and winemaking practices to future climatic conditions



4. Foundational Research

Foster viticulture and enology discovery that has the potential to provide foundations for future applications that address the other three strategic pillars

2019-2020 FUNDED RESEARCH PROJECTS

Laurent Deluc, Associate Professor, Department of Horticulture, Oregon State University
Determining the role of Auxin-Response Factor 4 in the timing of ripening initiation in Vitis vinifera

[Read update](#)  

Achala KC, Plant Pathologist and Assistant Professor, Department of Botany and Plant Pathology and Southern Oregon Research and Extension Center, Oregon State University

Grapevine trunk diseases in Oregon vineyards: A pilot project on epidemiology and management

[Read update](#)  

Walt Mahaffee, Research Plant Pathologist USDA-ARS-HCRL

Persistence of fungicide resistance in grape powdery mildew

[Read update](#) 

Marcelo Moretti, Assistant Professor, Department of Horticulture, Oregon State University

Moving away from herbicides and towards sustainable vineyard weed management



James P. Osborne, Extension Enologist, Department of Food Science and Technology, Oregon State University

Utilizing malolactic fermentation as a tool to prevent Brettanomyces bruxellensis wine spoilage

[Read update](#) 

Michael Qian, Professor, Department of Food Science and Technology, Oregon State University

Identification of smoke odorants by gas chromatography/olfactometry and assessment of smoke odorants in grapes and wine

[Read update](#)  

Patricia Skinkis, Professor and Viticulture Extension Specialist, Oregon State University

Characterizing Willamette Valley soil moisture and grapevine response under drying seasonal conditions

[Read update](#)   

Vaughn Walton, Professor and Horticultural Entomologist, Oregon State University

Improved understanding of virus transmission and management of key vector(s) associated with Grapevine Red Blotch Virus

[Read update](#)  

Jeremy B. Weisz, Associate Professor of Biology, Linfield University

Terroir and Microbiomes: Examining the impacts of environmental variations and farming practices on wine grape microbiomes



PROVIDE LEADERSHIP AND PARTNERSHIP

The Oregon Wine Board will harness statewide strength to unite and empower the Oregon wine industry

INDUSTRY COMMUNICATIONS

The OWB's [industry website](#) and biweekly [Grapevine Newsletter](#) are the primary sources of information on OWB's industry-facing offerings, opportunities and resources.

The Grapevine reaches nearly 2,200 members of the Oregon wine community and had a commanding average open rate of 29.5% and a 6.6% click-through rate, evidence of the value this resource provides the industry. Industry members who would like to be added to the OWB's distribution list can [sign up here](#).

INDUSTRY WEBSITE TRAFFIC BY THE NUMBERS 2019-20

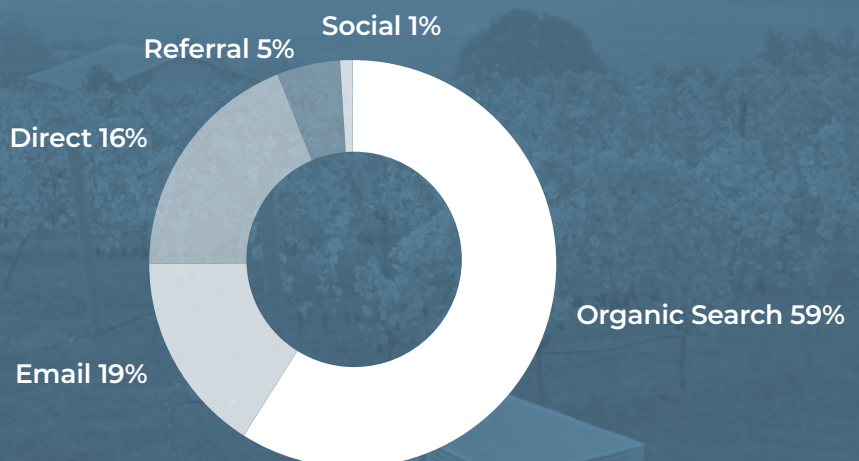
30,688
unique users

98,970
pageviews

48,243
sessions

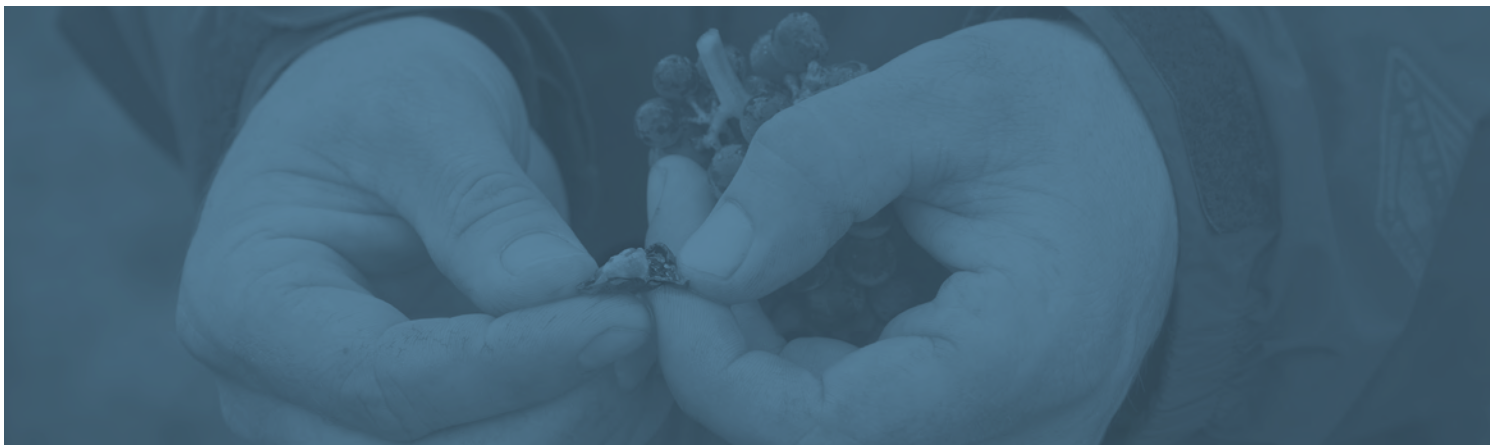
2:00
minutes per session

TRAFFIC SOURCE



The industry website offers a trove of information pertinent to owners and employees of Oregon's wine and grapegrowing businesses. It includes toolkits with guidance on taking advantage of OWB's marketing programs, a vast library of educational content, summaries of viticulture and enology research projects and much more.

The OWB also hosts a Facebook Group called the [Oregon Wine Industry Collaboration Space](#). This group is restricted to members of the Oregon wine industry and had 760 members at the end of June. The forum provides an opportunity for the Oregon wine community to interact on topics important to them, and offers the OWB an additional channel through which to share its most important and time-sensitive messages.



COVID-19 RESPONSE

In March, the reality for businesses, communities and families shifted dramatically and in unexpected ways with the onset of COVID-19. Like so many others, the Oregon wine industry has been deeply impacted by this pandemic in ways immediately evident and will continue to be in manners yet unknown.

During the spring, as in-person hospitality evolved to distanced transactions and restaurants closed their doors, the global demand system for fine wine experienced tectonic shifts, tilting heavily towards the e-commerce and off-premise channels. Most urgently, the emergency required businesses owners to re-examine their operating plans and budgets, and OWB managers did the same. As the season progressed, a rebalancing was required as guests began returning to wine country, but to experiences and offerings that might be fundamentally changed.

During the pandemic's early days, the OWB focused its efforts on providing timely resources, assistance and information to help the industry navigate the difficult terrain. These initiatives included:

- Quickly designing an online [COVID-19 Oregon Wine Industry Toolkit](#), providing a go-to library stocked with legal and regulatory advisory documents, research, OLCC news, media resources, promotional support program details and recorded webinars, which continues to be built as new needs and information emerge.
- Organizing regular industry Zoom forums to discuss the pandemic's impacts around the state, share ideas and best practices for managing through the crisis, and learning about ongoing developments at the state and federal level.
- Recruiting bankers, lawyers and accountants for webinars to help business owners navigate complex federal financial relief packages.
- Initiating roundtable industry discussions with growers from around the



Photo courtesy Sweet Cheeks Winery

state to discuss cost-control strategies and with sales professionals to look ahead at the ways current market dynamics are influencing the three-tier distribution model.

- Configuring a tracking dashboard to monitor Oregon's COVID-19 related press coverage and executing media relations campaigns to highlight the industry's charitable activities while keeping deadline-driven journalists up to date as the step-by-step reopening plan unfolded.
- Refreshing Oregon Wine Month digital graphics to extend the shelf life of the free materials sent to tasting rooms and national distributors, while reallocating Oregon Wine Month marketing money to #oregoninside and Oregon Vine Perks. These two new programs worked in tandem to stimulate short-term direct sales and preserve cash flow while encouraging wine tourism when possible.
- Arranging new discounts for Oregon wine industry members to take advantage of education opportunities offered by VingDirect, DTC Wine Workshops, WISE Academy and MTO Group.
- Investing in new functionality for the OWB's tasting room listings site, visit.oregonwine.org, enabling media and consumers to search for wineries that had updated their status to indicate whether they were back to hosting guests or they remained focused on curbside service.
- Expanding the functionality of the OWB's online Marketplace to serve emerging industry needs for communication and coordination.

With the pandemic persisting into the new fiscal year, the OWB is poised to remain nimble and steady as it buoys the industry through rough waters and prepares to emerge from this experience. And importantly, the strategic plan outlined at the front of this document provides OWB with valuable guidance on maintaining focus on the industry's collective success in the future.



OUR COMMITMENT TO CHANGE

DIVERSITY, EQUITY AND INCLUSION STATEMENT

In June, the Oregon Wine Board Directors and management team issued a statement affirming a collective commitment to racial equity. All nine directors and eight staff members will be undertaking education in the upcoming winter with an expert facilitator, and other efforts have begun to examine policies and practices to ensure OWB takes a proactive stance in the drive for equity in our organization.

OUR COMMITMENT TO CHANGE

Published June 2020

Let us start out by stating, unequivocally: Black Lives Matter.

Like you, the team and directors at the Oregon Wine Board have been processing, reflecting on and discussing our responsibility in the fight for racial equity in America. We must recognize the power of our platform and our potential to help build a just, equitable and thriving Oregon wine industry that in turn contributes to a just, equitable and thriving Oregon.

And yet for us to productively harness this power, we must first become more educated, aware and accountable ourselves, both as people and as professionals. This work will enable us to help Oregon's wine industry welcome and serve all—visitors, members of the trade, industry professionals—with equal respect and opportunity. We are committed to doing this work.

Our five-year strategic plan was built with input and inspiration from hundreds of industry members. It is fueled by our energy, insights, talents and collaborative instincts, but guided by our values. We are therefore also committed to cementing principles of equity thoroughly and thoughtfully into the work we are already undertaking in service to the industry. We are actively reviewing our programs, which span education, marketing, media relations and research, to identify where we can take meaningful, sustained action.

Here are the commitments we are making today:

Organizational Development and Accountability

The OWB directors and staff are committed to participating in education and training on the topics of equity and inclusion, which includes better understanding the ways racism historically and presently shapes our industry.

We have been working with the Governor's Diversity, Equity and Inclusion staff, inviting their assistance while we search for a professional partner to guide us further in this work, and intend to have completed an initial training program by the end of the summer. This is a first step at working to embed the principles of anti-racism and equity more fully into our organization's culture.

We will recruit for diversity for the Oregon Wine Board, staff and committees. We will set benchmarks for our organization so we can track and report on our progress.

Representation in Programs and Partnerships

We will ensure diverse race and gender representation in messaging across all audiences and channels.

This is especially pertinent as we embark on the work of developing a new Oregon Wine brand identity. In selecting our agency partner for this important project, we will consider the company's commitment to diversity and equity. We will do this for all partners we engage with, from event contractors to local printers and everyone in between.

Amplify Voices

We will collect and maintain a list of minority-owned Oregon wine businesses, and we will work with our partners to amplify minority-owned tourism businesses. We will share these resources through media relations and with our consumer audience.

We will recruit for diversity in our social spaces and the media professionals we connect with, including those we invite to Oregon for media tours.

Development Opportunities for Wine Professionals

We will implement a scholarship program for aspiring wine professionals of color in Oregon, underwriting attendance at the Oregon Wine Symposium and other wine education opportunities around the state. We will share the details of this program this fall.

We will strive to recruit diverse presenters and attendees across our educational offerings for the trade and industry.

This list is not by itself meaningful, as only through our action can we demonstrate our commitment to progress. As we grow, our efforts to establish equity in our work will grow too. It is our goal that in time, the principles of diversity, equity and inclusion will be proudly interwoven into the practices and processes of the Oregon Wine Board as part of our organizational DNA.

We know we have catching up to do. If you have ideas, needs or resources you would like us to consider, [please share them with us](#).

In community,
The Oregon Wine Board

FINANCIAL OVERVIEW

The Oregon Wine Board continued to supplement its annual grape assessment income with a Specialty Crop Block grant for out-of-state tasting events, a Wine County Plates Grant for the development of winery visitor profiles, a special allocation from the Oregon legislature for market access and research programs, and a significant investment in international marketing programs through the USDA's Market Access Program and Agriculture Trade Promotion program. Overall income for the year was \$2.9 million, of which nearly 23% came from grant and program related funding sources. This allowed OWB committees, management and Directors to continue their important work developing market access programs, funding research grant awards and expanding educational offerings.

The Board of Directors enhanced the technical research grant funding pool for a second year with the addition of \$87,500 allocated from the Market Access and Research Investment Strategy (MARIS) funding.

Expenses came in under budget for production of the annual Oregon Wine Symposium, which saw another boost in ticket sales due to higher attendance. Overall, the OWB continues to subsidize the event with a budget allocation of \$53,000, allowing ticket prices to remain affordable.

Unfortunately, many of OWB's spring marketing programs were affected by the COVID-19 pandemic and had to be repurposed or postponed. Some Oregon Wine Month funding was redirected to supporting the new Oregon Vine Perks program and funds related to an Oregon Wine Trail tasting event planned for Seattle are being redirected to a virtual education program to be delivered in the 2020-21 fiscal year. The media relations budget was effectively redistributed to support a virtual version of the cross-border AVA media tour hosted with the Washington State Wine Commission.

OWB added a new regional grant funding program in 2019-20 and supported the following regional marketing associations through the program: Rocks District Winegrowers, Umpqua Valley Winegrowers Association and Willamette Valley Wineries Association. This program will be carried forward in 2020-21 with the hope of providing funding to additional Oregon-based wine industry not-for-profits. More information about this program and the grant request form can be found on the [industry website](#).



Photo Allyson Kuhns for Eola Hills Wine Cellars

INCOME	BUDGETED	ACTUAL
Grape Assessment (\$25/ton)	1,890,141	1,953,139
Wine Tax (2¢/gal)	315,000	294,010
Symposium Revenue	188,00	332,930
Program Revenue	300,000	55,505
Grant Funds (Excluding MAP)	101,761	91,698
HB5006 Funds - MARIS	192,500	187,694
Other Income	6,000	5,004
TOTAL INCOME	2,993,402	2,919,980
EXPENSE	BUDGETED	ACTUAL
RESEARCH		
Viticulture & Enological Research Grants	437,500	417,500
Vineyard & Winery Study	72,000	71,000
Visitor Profile Study (WCLP)	18,761	11,471
Compensation, Admin and Travel	22,000	23,569
TOTAL RESEARCH	596,000	517,879
EDUCATION		
Symposium Programming	402,000	386,605
Profit Calculator Training	15,000	3,000
Other Industry Workshops	60,000	7,943
Compensation, Admin and Travel	119,000	120,331
TOTAL EDUCATION	596,000	517,879
MARKETING & COMMUNICATIONS		
Media Relations	158,500	138,598
International Marketing	156,000	153,156
Marketing Programs	443,000	282,274
Marketing Collateral	74,500	50,997
Market Research	35,000	12,300
Compensation, Admin and Travel	180,000	183,311
TOTAL MARKETING & COMMUNICATIONS	1,047,000	820,636
GENERAL & ADMINISTRATION		
Board Administration	20,000	15,529
Grant Writing Consultants	20,000	8,796
Industry Relations	35,000	37,505
Program Sponsorships	13,000	1,000
Office Administration	131,450	141,774
Compensation, Admin and Travel	837,000	805,642
TOTAL GENERAL & ADMIN	1,056,450	1,010,246
TOTAL EXPENSE	3,249,711	2,872,301

OREGON WINE INDUSTRY AWARDS

Each year at the Oregon Wine Symposium, the industry recognizes individuals for their contributions to the Oregon wine industry. Below are those who were honored in 2020.

Nominations are accepted year-round through the OWB [industry website](#).

FOUNDERS AWARD

Given to an individual whose pioneering, groundbreaking work has deeply influenced and advanced the interests of Oregon winegrowers and winemakers, fostering statewide collaboration.

HERB QUADY

OWNER, QUADY NORTH

PARTNER, BARREL 42 CUSTOM WINECRAFT AND
APPLEGATE VINEYARD MANAGEMENT



OUTSTANDING INDUSTRY LEADERSHIP AWARD

Recognizes an individual whose exemplary commitment and innovative leadership have contributed significantly to the advancement of the Oregon wine industry.

STEVE ROBERTSON | OWNER AND FOUNDER
DELMAS/SJR VINEYARD

VINEYARD EXCELLENCE AWARD

Given to a vineyard employee who demonstrates outstanding collaborative support under the supervision of vineyard directors and viticulturists. This person exemplifies remarkable technical knowledge, professionalism and an outstanding work ethic.

NAHUM BAHENA
ASSISTANT TO VINEYARD MANAGER
STIRLING WINE GRAPES

MOISES SOTELO | VINEYARD MANAGER
NEWGEN VINEYARD SERVICES

INDUSTRY PARTNER AWARD

Given to a person working in a field tangential to the wine industry whose cooperative approach has positively influenced the success of the Oregon wine industry and its members.

DR. GREG JONES | DIRECTOR OF THE EVENSTAD
CENTER FOR WINE EDUCATION
LINFIELD UNIVERSITY

BOARD SERVICE AWARD

Given in recognition of those who have completed their service on the Oregon Wine Board of Directors.

JOHN PRATT | OWNER
CELESTINA VINEYARD



BOB MORUS
Chairman
Phelps Creek
Vineyards



EUGENIA KEEGAN
Chair Emerita
Jackson Family Wines



KEVIN CHAMBERS
Vice Chairman
Koosah Farm



DONNA MORRIS
Treasurer
Winderlea Vineyard
and Winery



BERTONY FAUSTIN
Abbey Creek
Vineyard



HILDA JONES
Abacela Vineyards
and Winery



JUSTIN KING
King Estate Winery



BARBARA STEELE
Cowhorn Vineyard
and Garden



JASON TOSCH
Stoller Wine Group

MANAGEMENT TEAM



TOM DANOWSKI
President



MARIE CHAMBERS
VP Finance &
Operations



**CHRISTINA
DeARMENT**
Trade Relations and
Education Manager



STACEY KOHLER
Executive Assistant



KAI McMURTRY
Consumer Relations
Manager



SALLY MURDOCH
Communications
Manager



BREE STOCK MW
Education Manager



JESS WILLEY
Director of Strategic
Insights & Industry Relations

COMMITTEES & VOLUNTEERS

The Oregon Wine Board is indebted to the dozens of community members who volunteer on committees to help plan and produce programming that benefits the entire Oregon wine industry.

FINANCE COMMITTEE

The Finance Committee provides oversight on financial practices and procedures, previews Board reports and advises prior to external disclosures.

Chair: Donna Morris, Treasurer

Vice Chair: Bob Morus

Management Lead: Marie Chambers

VITICULTURE & ENOLOGY RESEARCH COMMITTEE

The Viticulture & Enology Research Committee consolidates near-term industry input on viticulture and enology research priorities; reviews and recommends applications for funding; and evaluates project progress.

Chair: Jason Tosch

Co-Vice Chairs: David Beck and John Pratt

Management Leads: Marie Chambers and Jess Willey

MEMBERS:

Leigh Bartholomew
Jim Bradshaw
Terry Brandborg
Robert Brittan
Johnny Brose
Tresider Burns
Ted Casteel
Leti Catoira
Elizabeth Clark*
Jason Cole

Dai Crisp
Scott Dwyer
Michael Fay
Chris Graves
Brian Gruber
Geoffrey Hall
Gina Hennen
Allen Holstein
Anthony King*
Erik Kramer
Bill Kremer

Ken Kupperman*
Mel Liebeck
Anna Matzinger
Ryan McAdams
Brian McCormick
Anneka Miller
Erica Miller
Kathy Miller
Karl Mohr
Michael Moore
Joey Myers*

Ray Nuclo
Dave Paige*
Tim Scott
Bruce Sonnen
Chad Vargas
Vince Vidrine
Karl Weichold

**Steering committee member*

EDUCATION COMMITTEE

The Education Committee advises and participates in development of an annual education calendar centered on the Oregon Wine Symposium.

Chair: Kevin Chambers

Vice Chair: Eugenia Keegan

Management Lead: Bree Stock MW

MEMBERS:

Viticulture & Enology:

Andrew Bandy Smith
Leigh Bartholomew
David Beck
Jeanne Beck
Ashley Campion
Scott Dwyer
Brian Gruber

Geoff Hall
Gina Hennen
Claire Jarreau
Greg Jones
Anthony King
James Osborne
Dan Rinke
Nichole Schulte
Patty Skinkis

Emily Terrell
Vince Vidrine
Karl Weichold

Business:

Ellen Brittan
Chris Cullina
Vanessa Hadick
Carrie Kalscheuer

Meg Murray
Jeff Peterson
Natalie Sigafos
Raechel Sims
Hallie Whyte

COMMITTEES & VOLUNTEERS

STRATEGIC MARKETING & COMMUNICATIONS COMMITTEE

The Strategic Marketing & Communications Committee consolidates industry input on strategic programs and priorities.

Chair: Donna Morris

Vice Chair: Barbara Steele

Management Lead: Jess Willey

MEMBERS:

Ellen Brittan
Craig Camp
Eugenia Keegan
Justin King
David Millman
Amy Prosenjak

*Thank you to all of the
industry's volunteer
committee members!*

INTERNATIONAL MARKETING COMMITTEE

The International Marketing Committee consolidates industry input on strategic programs and priorities.

Chair: Bob Morus

Vice Chair: Steve Thomson

Management Lead: Marie Chambers

MEMBERS:

David Adelsheim	John Gabelhausen	Howard Rossbach
Rob Alstrin	Ryan Harms	Thom Sichta
Shirley Brooks	Doyle Hinman	Alison Sokol Blosser
Randy Ford	Alexandra LaFontaine	Emily Zegar
Jon Foster	David Millman	
	Ryan Pennington	

INFORMATION SHARING TASK FORCE (ISTF)

The ISTF creates and facilitates awareness, adoption and engagement of opportunities, activities, key trends and developments in the Oregon wine community through active communications.

Management Lead: Sally Murdoch

MEMBERS:

Jason Hanson	Morgen McLaughlin	Andy Steinman
Jennifer Kerrigan	Jon Meuret	Corby Stonebraker-Soles
Joel Kiff	Rebecca Moore	Betty Tamm
Liz Knapke	Mary Olson	Jessica Thomas
Kim Kolb	Debby Phaneuf	Tom Waliser
Jean Kurtz	Luisa Ponzi	Dan Warnshuis
Jack La Rue	John Pratt	Nate Winters
Laurie Lewis	Sarah Reid	Karolyn Wright
Cathy Martin	Steve Robertson	Jill Zarnowitz
Brad Mayer	Annie Shull	
Brian McCormick	Scott Steingraber	

An up-to-date roster of committee leadership and members can be found on the OWB's [industry website](#).



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