



Covid-19 Impact: Winery Survey III

Oregon

25 Respondents

WineAmerica, the National Association for American Wineries, has conducted a series of online surveys of wineries and trade associations to assess the economic impact of the coronavirus crisis. This information is vital to members of Congress and the Administration who support the industry through various means.

This is the third survey of wineries, and focuses on the month of May in terms of operations, employment, tourism, sales and overall economic impact. Most American wineries have been able to continue operations, but have also lost money and will take some time to return to pre-Covid levels. A couple bright spots are the many innovative marketing initiatives by the wineries, and their proactive approach to seeking government aid to mitigate the economic effects of the pandemic.

Any questions about the survey may be directed to WineAmerica President Jim Trezise (jimtrezise@wineamerica.org).

Winery Information

1. Average Production (cases)

Average	Median
20,739	4,000

2. Average annual wine sales (Dollar value)

Average	Median
\$1,500,000	\$600,000

3. Pre- Covid Number of Employees (FTE, including Seasonal)

Average	Median	Minimum	Maximum
10	6	1	50

4. Normal Number of annual visitors (all locations)

Average	Median	Minimum	Maximum
8,430	5,000	5000	40,000

Coronavirus Impact

5. A. Based on prior years, or 2020 projections prior to the virus crisis, how many visitors did you EXPECT to see in May?

Average	Median	Minimum	Maximum
741	600	10	3,000

5. B. How many visitors did you ACTUALLY see during this period?

Average	Median	Minimum	Maximum
147	30	0	800

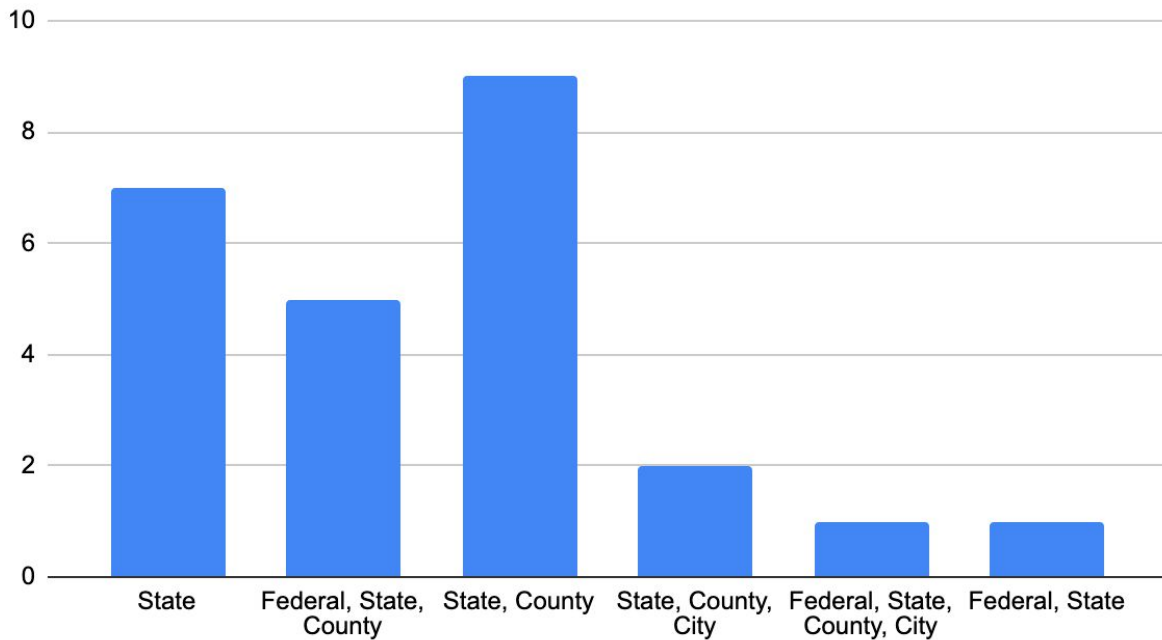
5. C. Calculated percentage change in visitors

Average	Median	Minimum	Maximum
-26%	-90%	-21%	-100%

6. Have you cancelled winery-specific or wine trail events during this period, and if so how many?

Average	Median	Minimum	Maximum
3.92	4	0	13

7. Have one or more levels of government recommended or required that you reduce or cease operations for a period of time? NB: 24 respondents (8.5%) were not ordered to close by any level of government.

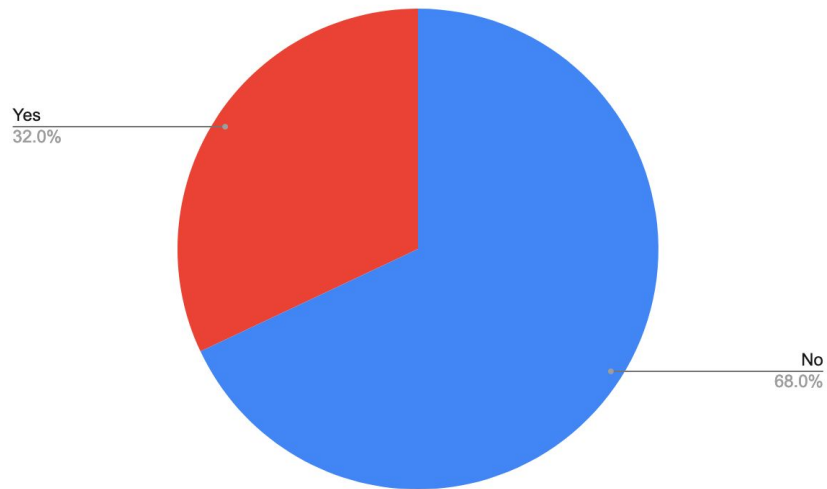


Count of Have one or more levels of government recommended or required that you reduce or cea...

8. Has your production stopped?

100% of respondents have continued production.

9. Has your production slowed?



10. During the Covid period (including May), how many employees (FTE) did you need to lay off, temporarily or permanently because of the Coronavirus?

Average	Median	Minimum	Maximum
3.18	1	0	24

11. During this period, what percentage of sales have you lost in your tasting rooms?

Average	Median	Minimum	Maximum
66%	80%	0%	100%

12. During this period, by what percentage did Direct-to-Consumer (DtC) sales increase or decrease?

Average	Median	Minimum	Maximum
14.3%	0%	-80%	+200

13. What percentage of wholesale sales (destined for off- and on-premise accounts) did you gain or lose compared with projections or the same period in the prior year?

Average	Median	Minimum	Maximum
-20%	-33%	-100%	+129%

14. Did you utilize any of the following marketing strategies to try and make up for losses?

Wine Club Specials	Reduced shipping costs	Special DTC Promotions	Curbside Winery Pickup	Home Delivery by Winery Personnel	Virtual Wine Tastings	None of the above
92%	88%	88%	96%	40%	24%	8%

15. During this period, how much in unanticipated expenses have you incurred for things like hand sanitizers, cleaning services, and other products or services that are not part of normal operations?

Average	Median	Minimum	Maximum
\$1100	\$500	\$0	\$7000

16. Combining your lost sales and unanticipated expenses during this period, what has been your total financial loss?

Average	Median	Minimum	Maximum
\$58,570	\$11,500	Gain of \$50,000	Loss of \$300,000

17. If the current situation continues through the end of June, how much do you anticipate for that month alone in terms of lost sales?

Average	Median	Minimum	Maximum
\$76,608	\$19,500	Gain of \$20,000	Loss of \$900,000

18. If the current situation continues through the end of June, how much do you anticipate for that month alone in terms of greater expenses?

Average	Median	Minimum	Maximum
\$3,052	\$300	\$0	\$50,000

19. If the current situation continues through the end of May, what would you expect the total financial impact to be?

Average	Median	Minimum	Maximum
\$55,114	\$17,350	\$0	\$500,052

20. If the current situation continues through the end of May, how many weeks do you feel it would take you to return to normal business in terms of employees, visitors, sales, and other factors?

Average	Median	Minimum	Maximum
23	16.5	1	52

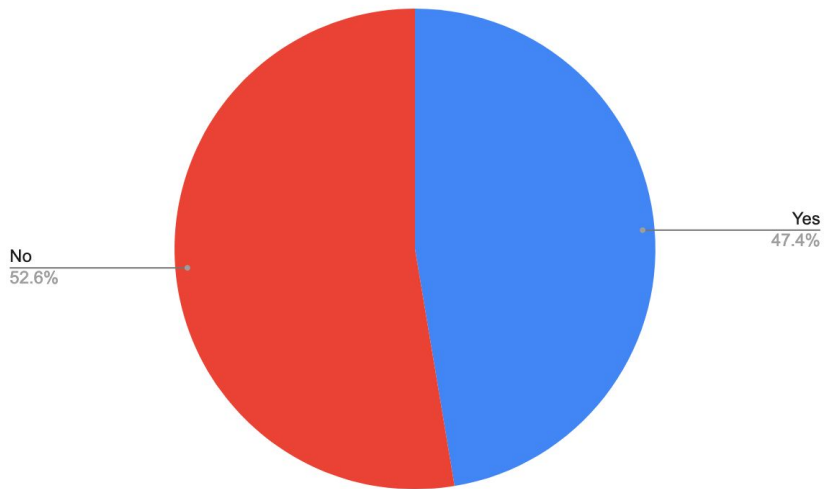
21. The \$2.2 trillion CARES Act contains several programs to help employees and small businesses, including wineries, through various grant and loan programs (the WineAmerica website has more detailed information about them). Have you applied for any of the following?

PPP	Economic Injury Disaster loan	USDA Disaster loans	None
68%	60%	12%	24%

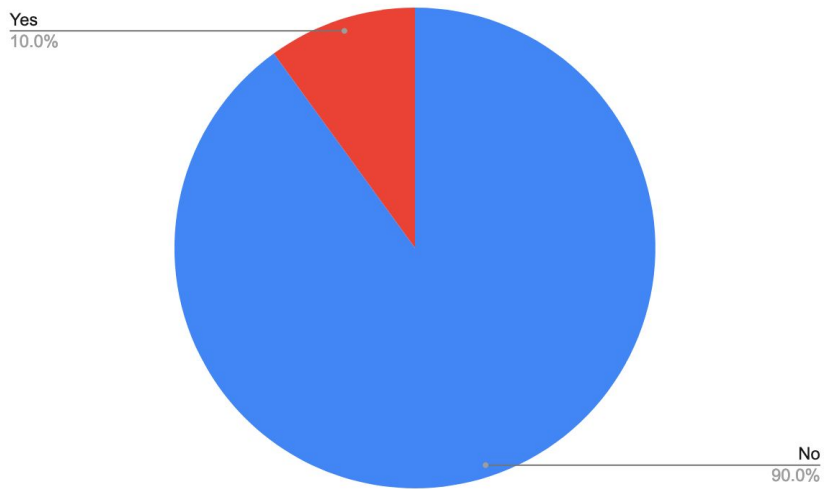
21A. Were you accepted for the Paycheck Protection Program?

All that applied were accepted.

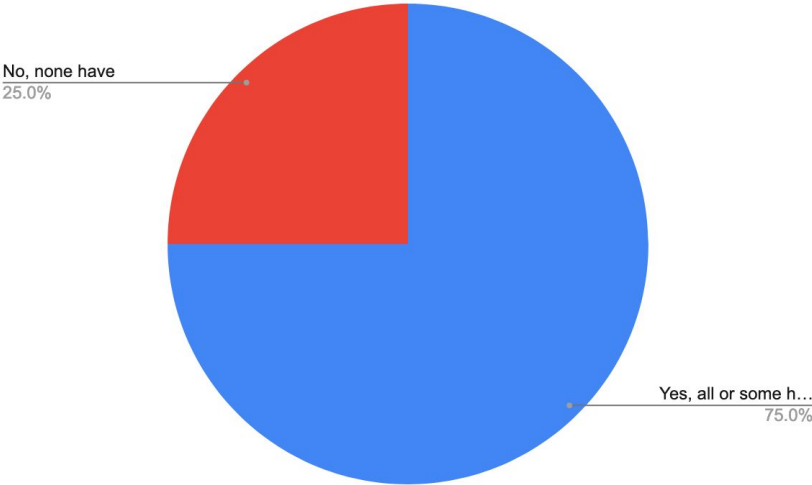
21B. Were you accepted for an Economic Injury Disaster Loan?



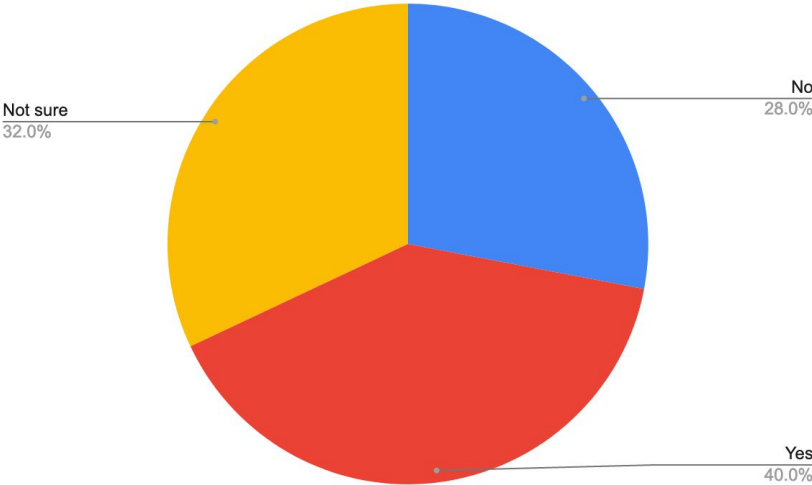
21C. Were you accepted for a USDA Disaster Loan?



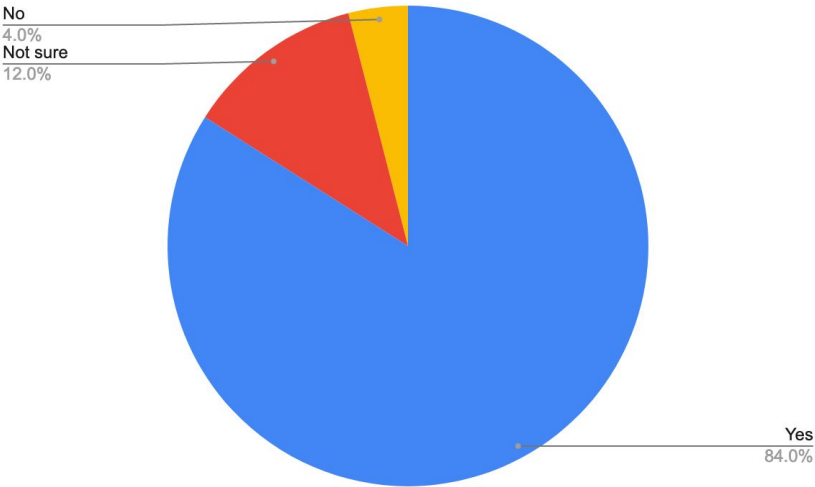
24. If you have laid off any employees, do you know if they have filed for Unemployment Insurance?



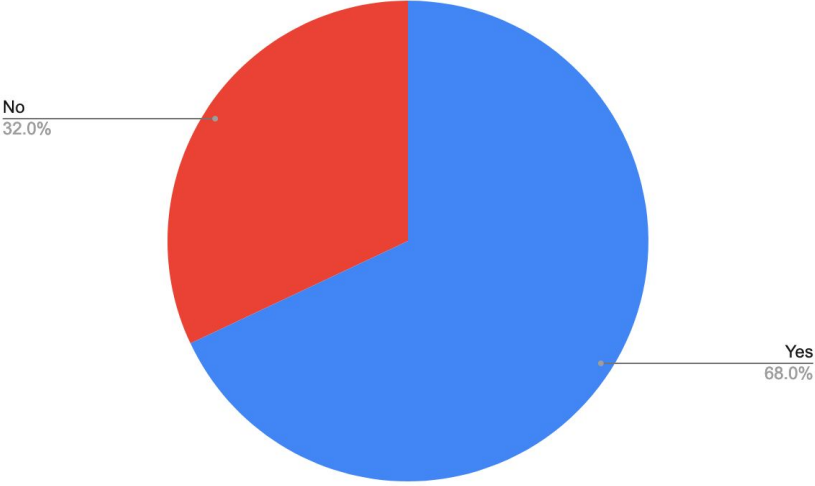
25. Do you feel that, so far, the federal government has been helpful in terms of mitigating the economic impact of this crisis?



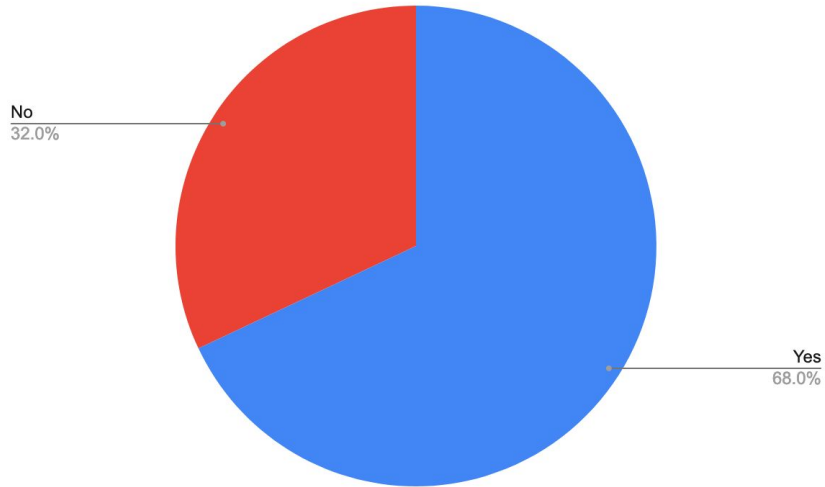
26. Do you feel that, so far, your state government has been supportive of your industry through measures such as defining the wine industry as “essential”, allowing new or relaxed marketing and distribution services such as curbside pick-up, home delivery, etc.?



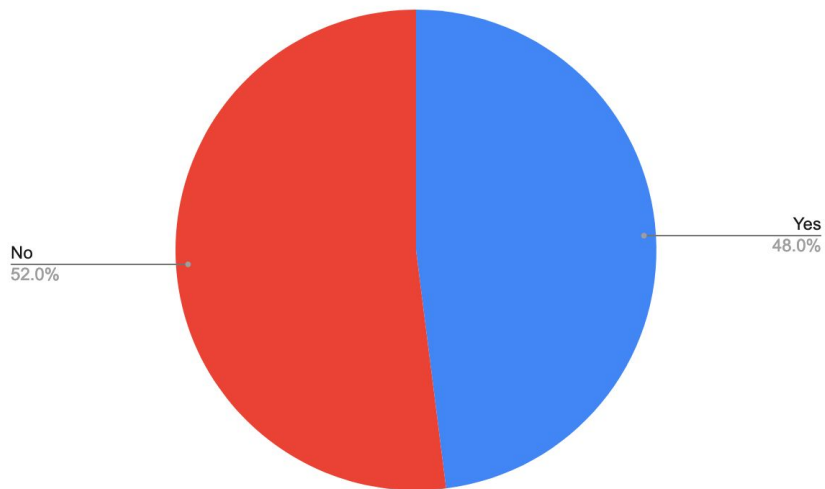
27. Has your tasting room opened in a limited capacity?



28. Have you adopted specific guidelines or best practices for reopening that are public?



29. Have you incurred unforeseen expenses with re-opening?



Thanks to all respondents. Contact jimtrezise@wineamerica.org with any questions.